Training Guide
Microsoft® Outlook 98

February 1999

DFAIT

Preparing Outlook 98 Exercise Files

Important

The data diskette included with this course contains several files that are used as the basis for student messages, contacts, and notes. Please note that many exercises will require use of e-mail. In such cases, use a colleague's e-mail address or your own. Also any messages you send will be stored in your Personal Mailbox Sent Items folder.

.doc Files on data disk

The **Journal.doc** and the **Specials List.doc** files are Word 97 document files for use with Section 6, Keeping a Journal and Utilizing Notes. You will be able to browse these files with WordPerfect 8.

.pst File on data disk

The **outlook98.pst** file on the data disk (A:\ drive) contains the initial data you need to install on your computer before you can work with the exercises in this manual. This data includes sent messages, contacts, and notes that you view in Section 1 and use from time to time in other sections. Once you open it, you will have a mailbox called OUTLOOK EXERCISES which you will work from when performing the exercises in this guide.

Adding your OUTLOOK EXERCISES Mailbox

To add the Outlook Exercise Mailbox containing the exercises used in this guide you need to copy outlook98.pst to your D:\ drive and open it from Outlook.

To copy outlook98.pst to your D:\ drive:

1. Create a folder on your D: drive called Training
2. Copy outlook98.pst to D:\Training

To open outlook98.pst:

1. Load Outlook
2. From the File menu, choose Open, Personal Folders (.pst)
3. Select **D:\Training\outlook98.pst** and choose OK.

Removing the OUTLOOK EXERCISES Mailbox

Once you complete the exercises in this guide you may wish to remove the OUTLOOK EXERCISES mailbox.

To remove the OUTLOOK EXERCISE Mailbox

1. From the Tools menu, choose Services.
2. Click OUTLOOK EXERCISES.
3. Click Remove and choose Yes.
4. Click OK.

Changing Outlook Default Settings

Make sure AutoPreview is the Inbox view and the Preview Pane is open. If there are such default messages in the Inbox as welcome messages from your network administrator or from Microsoft Exchange, permanently delete them.

Click Tools from the menu and choose Options. In the Outlook Options dialog box, make the following changes to the default settings:

- On the Preferences page, choose E-mail options. In the E-mail options dialog box, select the *Close original message on reply or forward* check box.

- Also in the E-mail options dialog box, choose Advanced E-mail Options, and then, in the Advanced E-mail Options dialog box, in the *When sending a message area,* select the Automatic name checking check box.

- On the Preferences page, choose Calendar Options. In the Calendar Options dialog box, in the Calendar work week area, in the Start time drop-down list box, enter 9:00 AM.

- On the Spelling page, make sure the *Always check spelling before sending* check box is deselected.

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Section 1

Acquiring the Basics

- Getting Started
- Getting Help
- Printing Documents
- Ending an Outlook Session

Section Skills and Their Importance

In the following section you will learn to:

- **Get started**
  Logging in to connect to your network and get your e-mail is an essential part of the startup procedure. To use Outlook efficiently, you need to recognize the parts of the Outlook window. You must be able to identify, use, and switch between Outlook folders to use all the Outlook features effectively.

- **Get help**
  On-line help is always available. You can display ToolTips or invoke the Office Assistant, Microsoft's newest interactive helper.

- **Print documents**
  You should set up your page so it prints clearly and gives you the information you want in the format you want it. You can preview your documents, select printing options, and send your document to the printer.

- **End an Outlook session**
  You must know when to minimize and when to exit from Outlook. If you want to leave Outlook running, you can minimize the Outlook window to a button on the taskbar. How you choose to exit from Outlook depends on what you will be doing later in the day.

Getting Started

Microsoft Outlook 98 is a software program that helps you manage your messages, your time, and your documents. Every day you have a variety of appointments and tasks, you send and receive messages, you open and close documents, you make notes, you call your colleagues and contacts, and you manage your files. Outlook integrates all these features into one program with one database. Outlook is most effective when used on a *network*, that is, when it is used with two or more computers that are physically connected.

With Outlook, you can record simple and complex appointments and resolve conflicting appointments. You can keep a list of tasks, somewhat like the to do list you might have on your desk, record information about business and personal contacts, review who you phoned and when, store notes and reminders to yourself, plan events for the entire year, and even track birthdays and anniversaries.

Starting Outlook

Once you are logged in to the network, you can start Outlook by double-clicking the Outlook icon on your desktop.

METHOD

To start Outlook:

1. Log in to the network.
2. On your desktop, double-click the Outlook icon.

EXERCISE

In the following exercise, you will start Outlook.

1. Log in to the network
2. Double-click the Outlook icon — *The Outlook window appears.*

END

Exploring the Outlook Window

The Outlook window, as illustrated in Figure 1-1, appears at start up. The window opens in its nonmaximized view displaying the Inbox. The window contains a title bar, menu bar, and status bar common to other Microsoft application windows. The toolbar contains context sensitive tools.

The *Outlook Bar* is a new screen element that contains *shortcuts* to the folders, where you store your information. You use the shortcuts, which store the folder location, just as you would use shortcuts on your desktop. You click a shortcut to access the information in your Inbox, your Calendar, your contact list, your task list, your Journal, and your notes. For example, when you click the Inbox shortcut, a list of the messages you received appears in the *information viewer,* that area of the Outlook window that displays the data for whatever folder is active. Group buttons at the top and the bottom of the Outlook Bar give you access to additional shortcuts to your remaining mail folders and to your file management folders.

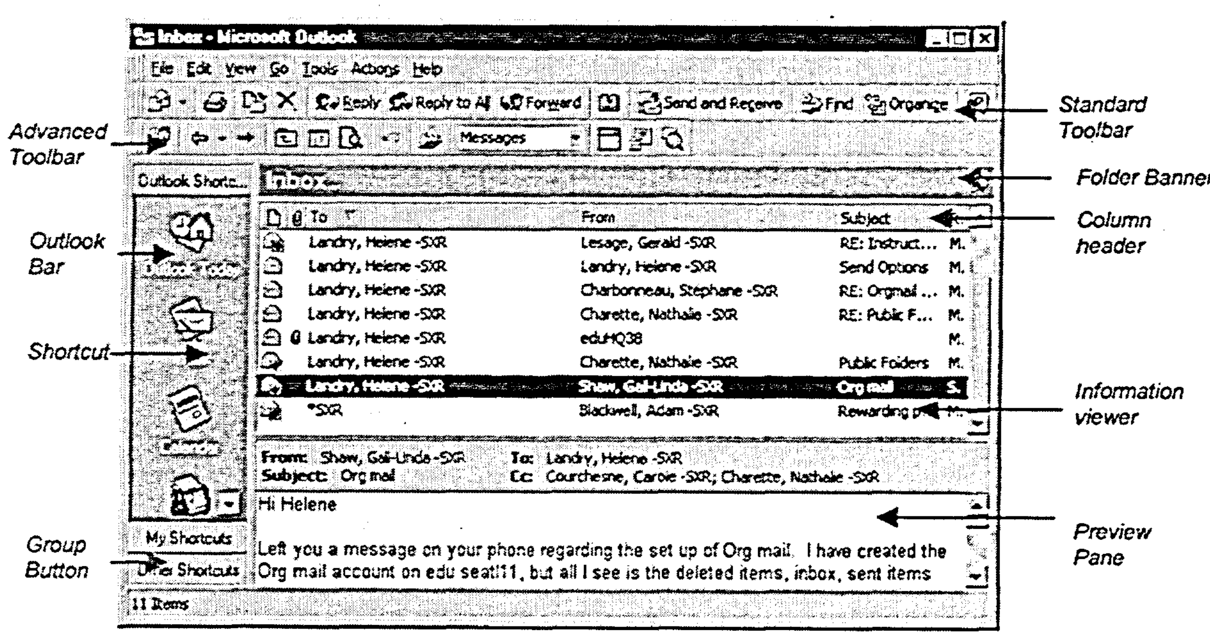


Figure 1-1: *The Components of the Outlook Window*

Table 1-1 describes the components of the Outlook window.

Component	Function
Outlook Bar	Holds folder shortcuts (icons) and buttons. Click a shortcut to activate an Outlook folder. Click a group button to access a different group of folders.
Standard and Advanced Toolbars	Hold context-sensitive buttons that provide shortcuts for many menu and keyboard commands.
Folder Banner	Displays the name of the active Outlook, Mail, or Other group folder. Click the name area to list all the subfolders.
Column headers	Categorize detailed information. Click to sort messages or tasks. Available in all Mail folders and in the Tasks folder.
Shortcuts	Icons on the Outlook Bar that provide access to Outlook folders.
Group buttons	Buttons that reveal additional groups of Outlook shortcuts.
Information viewer	The pane that displays the active Outlook folder.
Preview Pane	Displays the contents of selected message.

Table 1-1: *Outlook Window Components*

Navigating in Outlook

Microsoft Outlook 98 consists of the Outlook Shortcuts group, which is your time management tool; My Shortcuts group, which lets you process your e-mail; and the Other Shortcuts group, which gives you access to all your computer files.

Each Outlook feature functions as a program on its own, yet, because Outlook integrates the data into one database, the features work together to let you pull data from one directly into another.

The Outlook Shortcuts group gives you access to Outlook Today, the Inbox, Calendar, Contacts, Tasks, Journal, Notes, and Deleted Items folders. My Shortcuts group gives you access to the Drafts, Inbox, Sent Items, Outbox, and Deleted Items folders. The Inbox folder in the Outlook Shortcuts group is the same Inbox folder that is in My Shortcuts group. You simply access it from different groups. The Deleted Items folder is also accessible from both folders. The Other Shortcuts group gives you access to My Computer, Personal, Favorites and Public Folders folders.

You use the Outlook Bar shortcuts and the *Folder Banner* to navigate from folder to folder within Outlook. You can also use the Go menu to move from folder to folder.

Table 1-2 gives a brief description of each folder.

Shortcut	Folder	Function
	Outlook Today	Gives you an overview of your day. It lists the number of new e-mail messages, appointments and tasks for the day. Available in Outlook Shortcuts.
	Inbox	Holds and displays incoming e-mail. Available in Outlook Shortcuts and in My Shortcuts.
	Calendar	Lets you create and manage appointments, schedule meetings, and respond to invitations. Also gives you access to your tasks. Available in Outlook Shortcuts.
	Contacts	Holds your phone and address list. Available in Outlook Shortcuts.
	Tasks	Lets you list and prioritize what you need to do. Available in Outlook Shortcuts.
	Journal	Tracks e-mail, phone calls, and files you open. Available in Outlook Shortcuts.
	Notes	Lets you store and organize information you would normally jot down on paper or sticky notes. Available in Outlook Shortcuts.
	Drafts	Holds unfinished messages that are not sent. Available in My Shortcuts.
	Deleted Items	Stores deleted items so you can retrieve them, if necessary. Available in Outlook and in My Shortcuts.
	Sent Items	Holds copies of e-mail you have sent. Available in My Shortcuts.
	Outbox	Holds e-mail you sent that your e-mail system has not yet forwarded to the recipient. Available in My Shortcuts.
	My Computer	Represents the available drives on your computer and shows the folders, subfolders, and files available within each drive. Also accesses such features as Control Panel and Printers. Available in Other Shortcuts.

	Personal	Can be used to contain duplicates of mail folders as a backup copy. Personal folders are located on your computer's hard disk. Available in Other Shortcuts.
	Favorites	The folder in which you can store shortcuts to your favorite files, folders, and Web pages. Available in Other Shortcuts.
	Public Folders	Contains elements that can be read by everyone who can open the folder. Available in Other Shortcuts.

Table 1-2: *The Outlook Bar Folders and Their Functions*

The simplest way to navigate from folder to folder is by using the group buttons and the shortcuts on the Outlook Bar.

You can also navigate from folder to folder using the Folder Banner. When you click the banner, the complete Outlook *folder list* appears, showing you all folders accessible through Outlook.

A third way to access another folder is through the Go menu.

METHOD

To navigate in Outlook:

Outlook Bar method

1. On the Outlook Bar, click the desired group button.
2. Click the desired shortcut.

Folder Banner method

1. On the Folder Banner, click the name area.
2. From the folder list, choose the folder you want.

Menu method

1. From the Go menu, choose the folder you want.

EXERCISE

In the following exercise, you will navigate in Outlook.

1. If necessary, maximize the window

2. At the bottom of the Outlook Bar, click the My Shortcuts group button

   My Shortcutsl group button moves to the top of the Outlook Bar. The mail shortcuts appear.

3. Click the Sent Items shortcut

   *The words **Sent Items** and an envelope graphic appear on the Folder Banner. A list of your sent items appears.*

4. On the Folder Banner, click the words *Sent Items*

   The Outlook folder list appears.

5. Click the Notes folder

   *The word **Notes** and a graphic of a sticky note appear on the Folder Banner. Large icons of your notes appear in the information viewer.*

6. From the Go menu, choose Contacts

   *The word **Contacts** and a rotary card file appear on the Folder Banner. The information viewer shows the beginning of your contact list in alphabetical order and displays alphanumeric tabs for access to additional contacts.*

7. At the top of the Outlook Bar, click the Outlook Shortcuts group button

   The Outlook Bar displays the Outlook shortcuts.

8. Click the Calendar shortcut

   *The word **Calendar** and today's date appear on the Folder Banner. Your Calendar for today appears. You have no appointments for today. You do have three tasks.*

END

Getting Help

As a new user, you need to know where you can get help. When you have a question about Outlook, you can access online help quickly and easily. You can display ToolTips, use an *Office Assistant,* obtain a list of Help topics from Help Contents, or search for information about a specific topic using Help Index and Help Find. If you need help when you are using a dialog box, you can choose the Help button in the dialog box to see its related Help box.

In Outlook, the simplest Help aid is ToolTips. A ToolTip appears when you point the mouse pointer to a button on the toolbar. For example, if you point to the Print button, the ToolTip *Print* appears. If you click the Print button, you print the document.

Using an Office Assistant

The Office Assistant is an animated character that answers your questions about Outlook, occasionally volunteering tips as you work. When you activate the Office Assistant, a balloon that asks *What would you like to do?* appears. You can click a suggestion, type a question of your own, or view a tip. Figure 1-2 shows the Clippit Office Assistant with a balloon. The Office Assistant and the balloon cover part of the Outlook window.

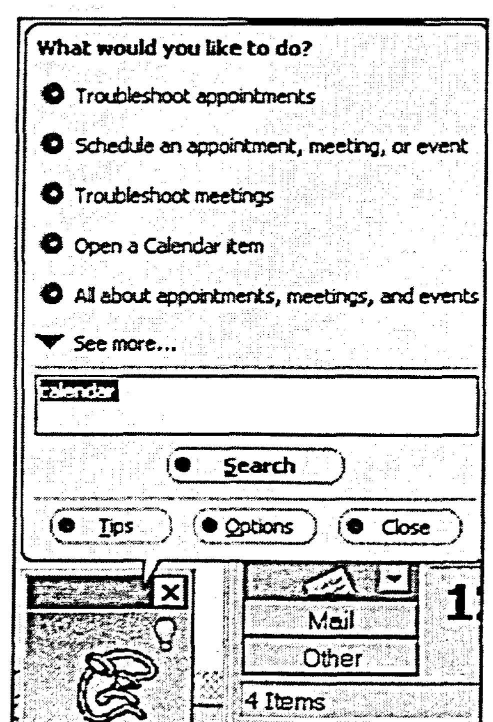


Figure 1-2: *The Clippit Office Assistant with a Balloon*

If the Office Assistant is not visible, you can make it appear by clicking the Office Assistant button on the toolbar. Figure 1-3 shows the Office Assistant button.

Figure 1-3: *The Office Assistant Button*

METHOD

To use an Office Assistant:

1. On the toolbar, click the Office Assistant button.
   or
1. If the Office Assistant is already open, click the Office Assistant.
2. In the balloon, choose Tips, and, after you read the tip, choose Close.
   or
2. In the balloon, in the *What would you like to do?* area, click a suggestion.
   or
2. In the balloon, in the text box, type a question, and then choose Search.
3. If necessary, repeat step 2.
4. After you read the text in the Help window, close the window.

EXERCISE

In the following exercise, you will use an Office Assistant.

1.	On the toolbar, click the Office Assistant button	*The Office Assistant and the balloon that asks **What would you like to do?** appear.*
2.	In the text box, type **calendar**	
3.	Choose Search	*Another Help balloon appears.*

4.	In the *What would you like to do?* area, click Calendar	*The Microsoft Outlook Help Topics* ***Calendar*** *page appears, identifying areas of the Calendar.*
5.	Position the mouse pointer over the call out containing the words *Date Navigator*	*The pointer becomes a hand.*
6.	Click the call out	*A help screen that explains Date Navigator appears.*
7.	Read the Help screen, and then click anywhere	*The help screen is closed.*
8.	Click another call out	*The help screen explaining the item appears.*
9.	Read the Help screen, and then click anywhere	*The help screen is closed.*
10.	Continue to examine the Help window, and, when you are finished, close the window	
11.	Click the Office Assistant	*The balloon appears.*
12.	Choose Tips	*Today's tip appears.*
13.	Read the tip, and then choose Close	
14.	Click the Office Assistant	*The balloon appears.*
15.	In the text box, type **How do I change the view?**	
16.	Choose Search	*Another balloon appears.*
17.	In the *What would you like to do?* area, click Change the view	*The Microsoft Outlook Help Topics* ***Change the view*** *page appears, explaining standard views and how to change them.*
18.	Read the text in the Help window, and then close the window	

END

Choosing an Office Assistant

Office 97 comes with nine built-in Office Assistants from which to choose. When you want to change the appearance of your Office Assistant, you use the Gallery page of the Office Assistant dialog box, shown in Figure 1-4, to make your choice.

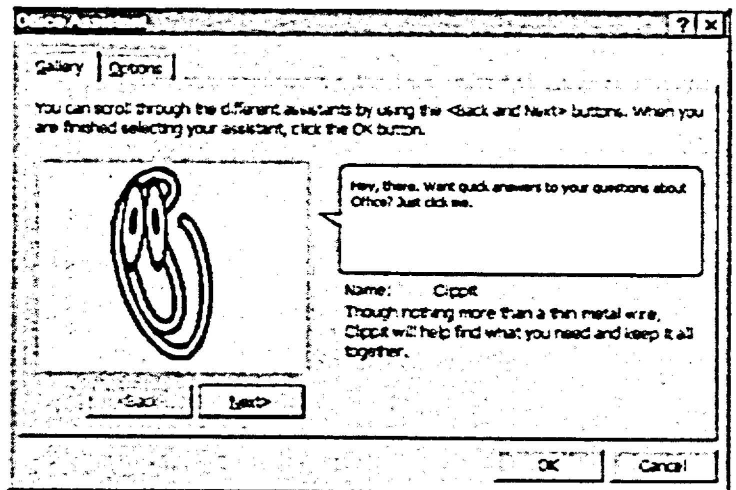


Figure 1-4: *The Gallery Page of the Office Assistant Dialog Box*

METHOD

To choose an Office Assistant:

1. Click the Office Assistant.
2. In the balloon, choose Options.
3. In the Office Assistant dialog box, select the Gallery tab.
4. Scroll through the assistants by clicking the Back and the Next buttons.
5. When you display the assistant you want, choose OK.

EXERCISE

In the following exercise, you will choose an Office Assistant.

1.	Click the Office Assistant	*The balloon appears.*
2.	Choose Options	*The Office Assistant dialog box appears.*
3.	Select the Gallery tab	*The Gallery page appears.*

4.	Click the Next button eight times	*The Office Assistants are scrolled through the preview pane.*
5.	Click the Back button as often as necessary to find the Office Assistant you want	
6.	Choose OK	*The chosen Office Assistant replaces the Clippit Office Assistant.*

END

Obtaining Context-Sensitive Help

You might sometimes need help when using a dialog box. During any step of a dialog box process, clicking the question mark to the left of the dialog box Close button and then clicking the area of the dialog box about which you have a question displays a *ScreenTip,* context-sensitive information about the area.

METHOD

To obtain context-sensitive help:

1. In any dialog box, click the question mark to the left of the Close button.
2. Click the area where you want help.
3. Read the information, and then click anywhere.

EXERCISE

In the following exercise, you will obtain context-sensitive help.

1.	Make sure the Calendar is open	
2.	From the Tools menu, choose Options	*The Calendar page of the Options dialog box appears.*
3.	Click the question mark to the left of the Close button	*A question mark appears beside the mouse pointer.*
4.	Click the button *E-mail options*	*The help information appears.*
5.	Read the information, and then click anywhere	*The help information disappears.*
6.	Choose Cancel to close the dialog box	

END

Printing Documents

You can print any Outlook files to carry with you when you are out of the office. If you usually carry a paper day planner, you can print the file in the size and layout of your planner. Using the Print dialog box, shown in Figure 1-5, and the Format page of the Page Setup dialog box, shown in Figure 1-6, you can select from a variety of layouts and print any number of sequential days for your calendar. You can print your contact list in numerous styles and sizes, including a size for your rotary card file. You can print your e-mail, your journal, and your tasks, as well. You can choose to preview your selection before printing to ensure that your layout, paper format, and date or alphabet range is correct.

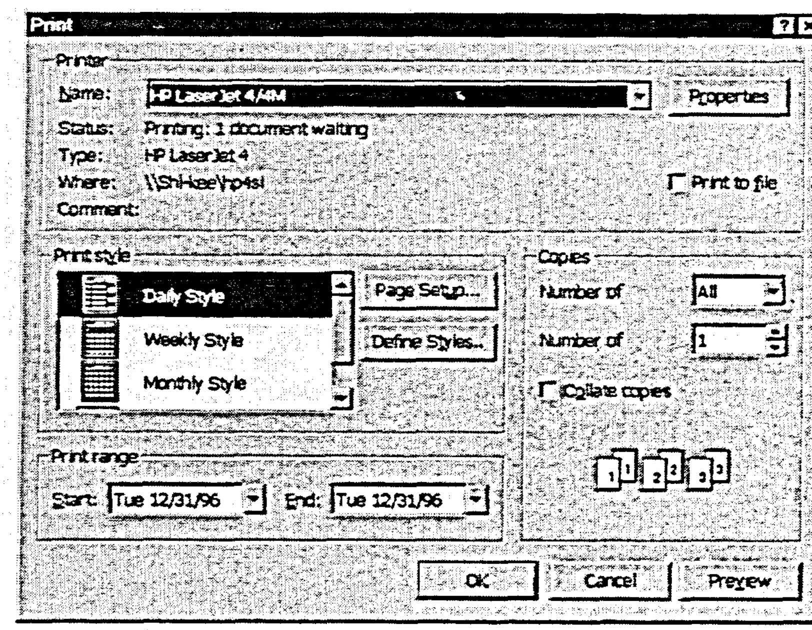


Figure 1-5: *The Print Dialog Box*

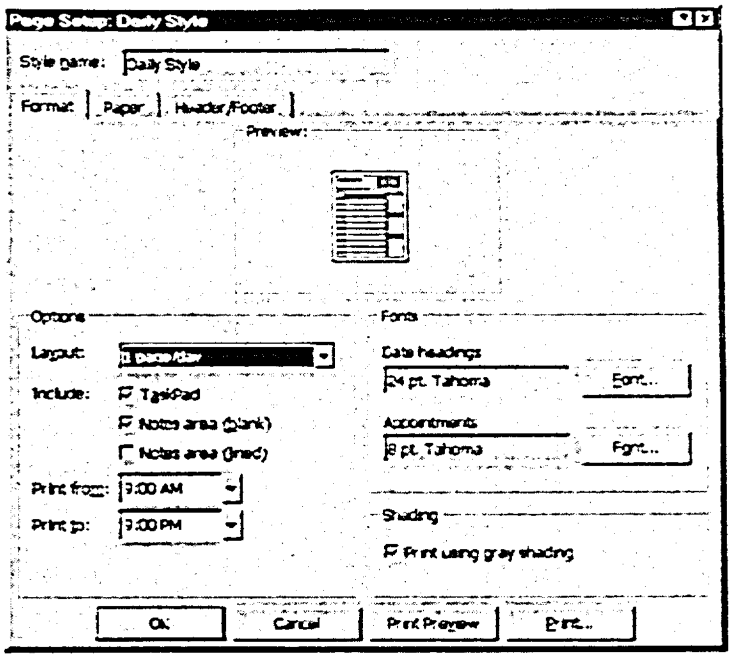


Figure 1-6: *The Format Page of the Page Setup Dialog Box*

Setting Up the Page

You might want to print today's schedule to carry to a local appointment, or you might prefer to print a full week's or month's schedule to take with you on a business trip. You might also need to print your Task list or your Contacts list. Outlook lets you print your information in whatever layout you specify and lets you customize the page.

METHOD

To set up the page for printing:

1. Open the Folder from which you want to print.
2. From the File menu, choose Print.
3. In the Print dialog box, choose Page Setup.
4. In the Page Setup dialog box, on the Format page, select the options you want.
5. Select the Paper tab.
6. On the Paper page, in the Paper area, select the options you want.
7. If desired, select the Header/Footer tab, and then type the desired header and/or footer.
8. Choose OK.

EXERCISE

In the following exercise, you will set up the page for printing.

1.	Make sure the Calendar is open	
2.	From the File menu, choose Print	*The Print dialog box appears.*
3.	Choose Page Setup	*The Page Setup dialog box appears.*
4.	On the Format page, in the Options area, from the Print from drop-down list, make sure 9:00 AM is selected	
5.	If necessary, from the Print to drop-down list, select 9:00 PM	
6.	Select the Paper tab	*The Paper page appears.*
7.	If necessary, in the Paper area, in the Type list, select Custom (the last selection in the list)	
8.	If necessary, in the Page area, in the Size list, select Day Timer Junior Pocket	*The preview pane in the Orientation area shows four pages.*
9.	Choose OK	*The Print dialog box reappears.*

END

Selecting Additional Printing Options

You can select additional printing options in the Print dialog box. This is where you select the style and the range of your printout.

METHOD

To select additional printing options:

1. Open the Print dialog box.
2. In the Print Style area, from the list of previews, select a style.
3. In the Print Range area, from the drop-down lists, select the range.

EXERCISE

In the following exercise, you will select additional printing options.

1. Make sure the Print dialog box is open

2. In the Print style area, from the Print style list, select Weekly Style

3. In the Print Range area, make sure the Start drop-down list displays today's date

4. From the End drop-down list, select the date one week from yesterday

END

Previewing and Printing a Document

You should preview your documents before printing them to make sure you have set your options exactly the way you want them. When you are satisfied with the appearance, you can print your document.

METHOD

To preview a document:

1. In the Print dialog box, choose Preview.
2. If desired, in the Print Preview window, position the magnifier over the area you want to examine in detail, and then click the area.
3. If dissatisfied with the appearance of the document, on the toolbar, choose Page Setup to open the Page Setup dialog box and to reset options. Then choose OK to return to the Print Preview dialog box.

To print a document from Print Preview:

1. On the toolbar, choose the Print button.
2. In the Print dialog box, choose OK.

To print a document from the Print dialog box:

1. Choose OK.

EXERCISE

In the following exercise, you will preview and print your Calendar.

1.	In the Print dialog box, choose Preview	*The Print Preview window appears displaying your Calendar for the current week.*
2.	Position the magnifier over the date at the top left, and then click the area	*The date area is magnified.*
3.	Click the area again	*The Calendar zooms out to show the full week.*

4.	On the toolbar, choose Page Setup	*The Page Setup dialog box appears.*
5.	If necessary, in the Options area, select the Arrange Top to bottom option button	*The Preview area shows the days of the week arranged to print top to bottom, Monday through Wednesday in the left column and Thursday through Sunday in the right column.*
6.	In the Options area, select the Arrange Left to right option button	*The Preview area shows the days of the week arranged to print left to right, Monday through Sunday.*
7.	Choose OK	*The Print Preview window reappears.*
8.	Choose Print	*The Print dialog box appears.*
9.	Choose OK	*The Calendar for this week and next is printed.*

END

Ending an Outlook Session

As with any Windows application, when you are not actively using a program, you can choose to minimize it or exit from it. After checking your mail and your calendar at the beginning of the day, you might want to minimize Outlook. This lets you check for messages periodically without signing in and out of the program repeatedly. It also lets Outlook send you reminders before your appointments. At the end of the work day, you should exit from Outlook and log off.

Saving Your Data

In many applications, you must take some action to save your data as you work and when you finish your work session. In a database application such as Outlook, many actions you take are automatically saved.

When you make entries in the information viewer, you activate the area of the pane in which you are working. As long as you are working in that area, you can freely make changes. When you write an appointment directly on your Calendar, write a note, write a task directly on your to do list, or enter an activity directly in your journal, Outlook saves your data as soon as you click anywhere outside the activated area.

You can also enter appointments, contacts, tasks, and journal items using windows Outlook provides. These windows allow you to enter far more detailed information than you enter directly in the information viewer. The windows have a button on the toolbar that lets you save and close the window; only in these windows do you indicate whether to save. If you close such a window without saving, Outlook provides a message box that asks, *Do you want to save change?* to warn you that you are closing the window without saving your data and to give you another opportunity to save what you entered.

When you receive a message, Outlook automatically saves it in your Inbox. After you read the message, you can have Outlook continue to save it in your Inbox or you can tell Outlook to save it in another folder. When you create an e-mail message to send, you can save it in your Drafts folder to send later or you can send it immediately, having Outlook automatically save it in your Sent Items folder.

Minimizing and Restoring Outlook

By minimizing Outlook rather than exiting from it, you can quickly return to Outlook to check your messages, appointments, and notes. When you minimize Outlook, Outlook continues to run in the background. The application is represented on the taskbar by a button that displays the active Outlook folder, as shown in Figure 1-7. When you have numerous programs running, the entire title is not usually visible. When you have a new message in your Inbox, Outlook displays an envelope icon on the taskbar that disappears when you read the message.

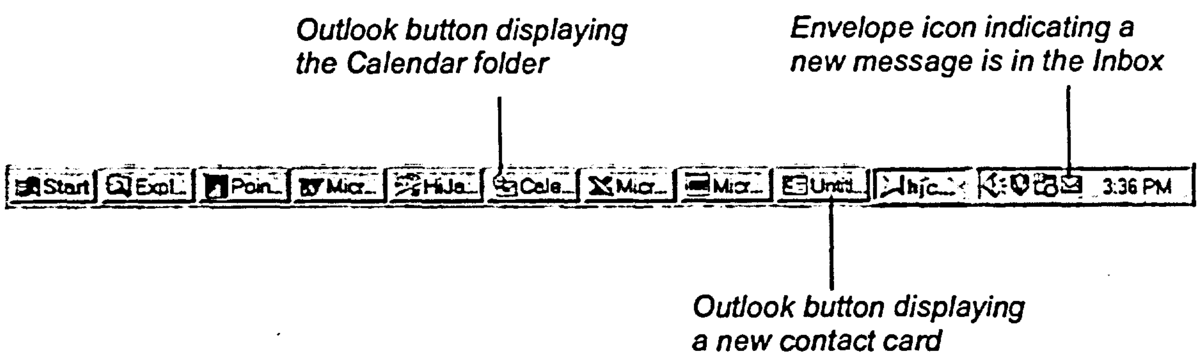


Figure 1-7: *Taskbar Showing Outlook Buttons*

When you want to restore the Outlook window, you simply click the Outlook button on the taskbar.

Exiting from Outlook and Logging Off

Two exit options are available from the File menu—Exit and Exit and Log Off. As your log in process to WinNT has already authenticated you as a user and there was no requirement for you to log in to Outlook, both options will close Outlook.

METHOD

To exit from Outlook:

1. From the File menu, choose Exit or Exit and Log Off
   or
1. Click the Close button.

EXERCISE

In the following exercise, you will exit from Outlook and log off.

1.	From the file menu, chose Exit and Log Off	*Outlook is closed.*

END

Section 1 Summary

To start Outlook and log in:

1. Log in to the network.
2. On your desktop, double-click the Outlook icon.
3. If necessary, in the Microsoft Mail dialog box, in the Mailbox text box, type your user ID.
4. In the Password text box, type your password.
5. Choose OK.

To navigate in Outlook:

Outlook Bar method

1. On the Outlook Bar, click the desired group button.
2. Click the desired shortcut.

Folder Banner method

1. On the Folder Banner, click the name area.
2. From the folder list, choose the folder you want.

Menu method

1. From the Go menu, choose the folder you want.

To obtain context-sensitive help:

1. In any dialog box, click the question mark to the left of the Close button.
2. Click the area where you want help.
3. Read the information, and then click anywhere.

To use an Office Assistant:

1. On the Standard toolbar, click the Office Assistant button.

   or

1. If the Office Assistant is already open, click the Office Assistant.
2. In the balloon, choose Tips, and, after you read the tip, choose Close.

   or

2. In the balloon, in the *What would you like to do?* area, click a suggestion.

   or

2. In the balloon, in the text box, type a question, and then choose Search.
3. If necessary, repeat step 2.
4. After you read the text in the Help window, close the window.

To choose an Office Assistant:

1. Click the Office Assistant.
2. In the balloon, choose Options.
3. In the Office Assistant dialog box, select the Gallery tab.
4. Scroll through the assistants by clicking the Back and the Next buttons.
5. When you display the assistant you want, choose OK.

To set up the page for printing:

1. Open the Folder from which you want to print.
2. From the File menu, choose Print.
3. In the Print dialog box, choose Page Setup.
4. In the Page Setup dialog box, on the Format page, select the options you want.
5. Select the Paper tab.
6. On the Paper page, in the Paper area, select the options you want.
7. If desired, select the Header/Footer tab, and then type the desired header and/or footer.
8. Choose OK.

To select additional printing options:

1. Open the Print dialog box.
2. In the Print Style area, from the list of previews, select a style.
3. In the Print Range area, from the drop-down lists, select the range.

To preview a document:

1. In the Print dialog box, choose Preview.
2. If desired, in the Print Preview window, position the magnifier over the area you want to examine in detail, and then click the area.
3. If dissatisfied with the appearance of the document, on the toolbar, choose Page Setup to open the Page Setup dialog box and to reset options. Then choose OK to return to the Print Preview dialog box.

To print a document from Print Preview:

1. On the toolbar, choose the Print button.
2. In the Print dialog box, choose OK.

To print a document from the Print dialog box:

1. Choose OK.

To exit from Outlook:

1. From the File menu, choose Exit or Exit and Log Off.
   or
1. Click the Close button.

Section 1 *Self-Check Exercise*

1. Start Outlook.
2. In My Shortcuts group, open the Deleted Items folder.
3. Switch to the Outlook Shortcuts group and read the notes in the Notes folder.
4. Ask the Office Assistant to give you information about making a recurring appointment.
5. Choose another Office Assistant.
6. From the Tools menu, choose Options. On the Preferences page of the Options dialog box, in the E-mail settings area, use context-sensitive help to learn what the E-mail Options button does.
7. Open the Contacts folder. Prepare to print your address cards in Card Style. If necessary, in the Page Setup dialog box, on the Paper page, select letter paper with the page sized for the Day Runner Classic paper planner. Preview and then print your cards.
8. Exit from Outlook.
9. Restart Outlook.
10. Close the Office Assistant.

Section 2

Communicating with Mail

- Using the Inbox
- Composing a New Message
- Forwarding and Replying to Messages
- Managing Messages Using Folders

Section Skills and Their Importance

In the following section you will learn to:

- **Use the Inbox**
  The Inbox is where you receive e-mail messages. You can read your messages, print them, and sort and filter them. You can also preview a message and decide whether to open it.

- **Compose a new message**
  You must address and type your new message. You can edit what you write, format text, and check your spelling. When you are satisfied with your message, you can send it.

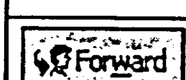
- **Forward and reply to messages**
  Sometimes you will send someone else a copy of a message you received. In addition, you will often respond to messages.

- **Manage messages using folders**
  As you add data to your folders, you might want to reorganize where you store the data and move your data from one folder to another. Sometimes you might want to delete data to eliminate files from your hard drive. If you find you deleted the wrong data, you can immediately recover it.

Using the Inbox

When new mail arrives in your Inbox, Outlook notifies you. Whether you are working in Outlook or have Outlook minimized and are working in another program, Outlook makes a sound and displays an envelope icon on the taskbar when new mail arrives. Outlook also briefly changes your mouse pointer to the shape of an envelope to notify you of your new message.

The Inbox, the Outbox, the Sent Items folder, the Drafts folder and the Deleted Items folder display the same two context-sensitive Mail toolbars, the Standard toolbar and the Advanced toolbar. The standard toolbar is displayed by default. To display the Advanced toolbar, from the **View** menu, choose **Toolbars, Advanced**. Table 2-1 summarizes the functions of these toolbar buttons.

Button	Name	Function
Standard Toolbar		
	New Mail Message	Opens the New Mail Message window so you can compose and send a message. The drop-down arrow gives you access to the New windows for the other Outlook features.
	Print	Prints the selected item. To select print options, click **File** menu and choose **Print**.
	Move to Folder	Displays a list of the folders that you can move an item to.
	Delete	Removes the selected item and moves it to the Deleted Items folder.
	Reply	Converts a message you received into a new message to which you can add comments. Then you can send your comments to the sender.
	Reply to All	Converts a message you received into a new message to which you can add comments. Then you can send the message and your comments to the sender and to everyone else who received the original message.
	Forward	Converts a message you received into a new message to which you can add comments. Then you can send the message to someone else.
	Address Book	Stores the e-mail addresses of all the names in your postoffice.

	Send and Receive	Connects to the server to send and receive messages if working off-line
	Find	Searches items for the word(s) your specify
	Organize	Displays or Hides the Organize pane for the currently selected folder so you can rearrange its contents.
	Office Assistant	Displays the Office Assistant.
Advanced Toolbar		
	Outlook Today	Displays the Outlook Today page.
	Back	Opens the previous item.
	Forward	Opens the next item.
	Up One Level	Opens the folder that is one level above the current folder.
	Folder List	Displays or hides the list of all folders.
	Print Preview	Shows how an item will look when you print it.
	Undo	Reverses the last command or deletes the last entry you typed.
	Rules Wizard	Automates processing messages by creating rules.
	Current View	Filters your messages by Last Seven Days, Sender, Unread Messages, and so forth. The drop-down arrow lets you select a filter.
	Group By Box	Groups your messages by a selected column header.
	Field Chooser	Allows you to add, remove and create fields for a form or a view.
	AutoPreview	Sets your message list to display the subject line and the first three lines of messages.

Table 2-1: *The Mail Toolbar Buttons*

Previewing and Opening Messages

Messages that others have sent you are stored in your Inbox. If you select the Inbox folder in the Outlook bar, a list of your messages appears in the information viewer. Each entry in the *message list* gives you information about the message, such as who sent it and its subject. This information is listed under the column headers, described in Table 2-2.

Column header	Function
	Indicates message importance.
	Indicates message type.
	Flags the message for later action.
	Indicates whether there is an attachment.
From	Identifies the sender of the message.
Subject	Identifies the subject of the message.
Received	Indicates when the message was received.

Table 2-2: *Column Headers*

Messages that you haven't read appear in bold in the message list. The bottom part of your information viewer displays the currently selected message in the Preview pane. In addition, you can preview messages by setting the message list to show you the first few lines of the message. When you open the full message, it appears in a message window, illustrated in Figure 2-1.

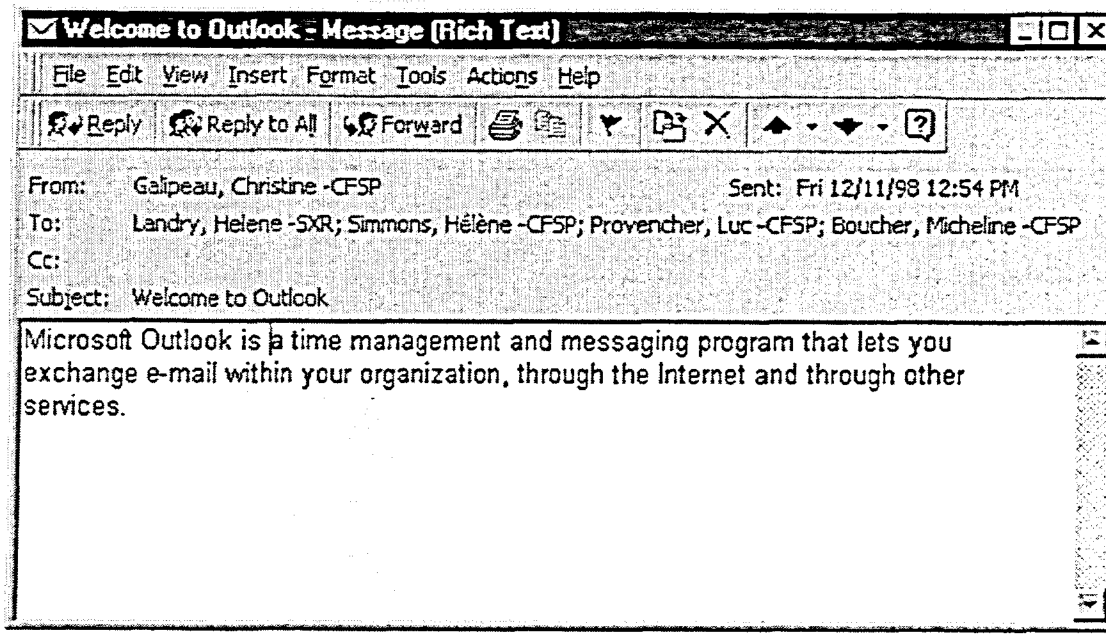


Figure 2-1: *The Message Window with a Received Message*

METHOD

To preview messages:

1. If necessary, on the Outlook Bar, click the Inbox shortcut.
2. On the Advanced toolbar, click the AutoPreview button.
   or
2. From the View menu, choose AutoPreview.

To display the Preview pane:

1. From the View menu, choose Preview Pane.

To open a message:

1. If necessary, on the Outlook Bar, click the Inbox shortcut.
   or
1. On the taskbar, double-click the envelope icon.
2. In the message list, double-click the message.

EXERCISE

In the following exercise, you will preview messages and you will open a message.

1.	If necessary, on the Advanced toolbar, click the AutoPreview button	*All messages display their first three lines.*
2.	In the message list, double-click the **Outlook** message	*The Message window opens.*
3.	Read the message	

END

Selecting and Printing a Message

You can print the message that is currently displayed. You can also print a message without opening it.

METHOD

To select a message:

1. In the message list, click the message.

To print a message:

1. Open the message.
   or
1. In the message list, select the message.
2. On the Standard toolbar, click the Print button.

Note: When printing from the message list, you can select multiple messages to print by pressing CTRL and selecting the desired messages. Release CTRL when you have selected all the desired messages.

EXERCISE

In the following exercise, you will print a message.

1.	Make sure the **Outlook** message is open	
2.	On the Standard toolbar, click the Print button	*The message is printed.*

END

Closing a Message

When you have finished reading a message, you should close it. The message still appears in your message list, but the text that appears is no longer bold.

METHOD

To close a message:

1. In the Message window, click the Close button.

EXERCISE

In the following exercise, you will close a message.

1.	In the **Outlook** message window, click the Close button	*The message is closed. The text that appears is no longer bold in the message list.*

END

Sorting Messages

You can sort your messages by any item shown in the column headers of the message list. To sort your messages, simply click the column header on which you want to sort. By default, the first time you click the column header the sort occurs in ascending order. The next time you click the column header it sorts in descending order.

METHOD

To sort messages:

1. In the message list, click the desired column header.
2. If desired, click the column header again to change the sort order.

EXERCISE

In the following exercise, you will sort messages.

1.	On the Outlook bar, click My Shortcuts button	*The Mail shortcuts appear.*
2.	Click the Sent Items shortcut	*The contents of the Sent Items folder appear in the information viewer.*
3.	In the column headers, click the To header	*The messages are sorted in alphabetical order based on the recipient name.*
4.	Click the Sent column header	*The messages are sorted by date and time order.*
5.	Click the Sent column header again	*The messages are sorted by date order opposite to the preceding step.*

END

Filtering Messages

You can *filter* your data in each Outlook folder by selecting a filter from the Current View drop-down list. When you filter messages, you display a specified subset of messages.

The Inbox Current View drop-down list gives you numerous criteria to use to filter the messages. Table 2-3 summarizes the Inbox Current View filters.

Name	Function
Messages	Shows the subject line of all messages in the folder.
Messages with AutoPreview	Shows the subject line and the first three lines of all unread messages in the folder. Shows the subject line only of other messages.
By Follow-Up Flag	Groups flagged messages first, then groups normal (unflagged) messages.
Last Seven Days	Shows only those messages received in the last seven days.
Flagged for Next Seven Days	Shows only those messages that are flagged for action in the next seven days.
By Conversation Topic	Groups messages alphabetically by subject.
By Sender	Groups messages alphabetically by sender.
Unread Messages	Shows unread messages only.
Sent To	Shows who else received the same message.
Message Timeline	Graphically shows when each message was received.

Table 2-3: *The Inbox Current View Filters*

METHOD

To filter messages:

1. On the Advanced toolbar, click the Current View drop-down list arrow.
2. From the drop-down list, select a filter.
3. If necessary, in the message box, select an option button, and then choose OK.

EXERCISE

In the following exercise, you will filter messages.

1.	Make sure you are in the Sent Items folder	
2.	On the Advanced toolbar, click the Current View drop-down list arrow	*The drop-down list appears.*
3.	From the drop-down list, select By Conversation Topic	*The messages are grouped by subject.*
4.	On the Advanced toolbar, click the Current View drop-down list arrow	*The drop-down list appears.*
5.	From the drop-down list, select By Follow-Up Flag	*The messages are all grouped as normal; no messages are flagged.*
6.	Filter the messages by Sent To	

END

Composing a New Message

To compose a new message, you use the New Message window, shown in Figure 2-2. You can open the New Message window from any Mail folder by clicking the New Mail Message button on the Standard toolbar.

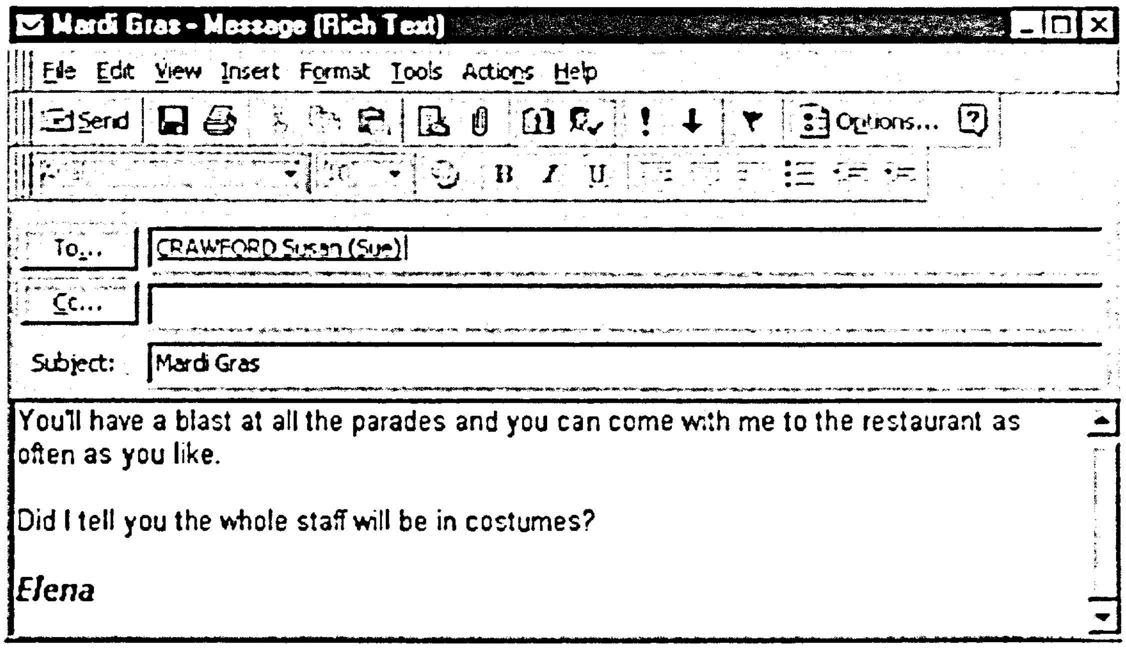


Figure 2-2: *The New Message Window with a New Message to Send*

To create and send a message, you must do three things. First, you must address the message. Second, you must type the body of the message, and third, you must send the message.

The buttons on the New Message window toolbar, described in Table 2-4, facilitate addressing and sending the message.

Button	Name	Function
	Send	Sends the message.
	Save	Saves the message to disk.
	Print	Prints the message.
	Cut	Cuts selected items and stores them in the Clipboard.
	Copy	Copies selected items and stores them in the Clipboard.
	Paste	Pastes the contents of the Clipboard at the insertion point.
	Signature	Displays additional automatic signatures that you can choose from and allows you to create new ones.
	Address Book	Opens the Address Book, which contains addresses for all addressees in your postoffice and in your personal address book.
	Check Names	Checks names that you type into the To field against names in the Address Book.
	Message Flag	Flags the message for later attention.
	Importance: High	Displays an exclamation point next to the message, indicating that its importance is high.
	Importance: Low	Displays a down arrow next to the message, indicating that its importance is low.
	Insert File	Inserts a file (attachment) in the message.
	Options	Allows you to change the default options before sending your messages.
	Office Assistant	Displays the Office Assistant.

Table 2-4: *New Message Window Toolbar Buttons*

Addressing and Typing a Message

To address a message, type the recipient's *user name* in the To text box. A user name is a unique name assigned to each Outlook user on your network. You can address a message to more than one recipient by separating each user name with a comma or a semicolon. If you'd like to send a courtesy copy of your message, type the recipient's name in the Cc text box.

You can also type the first few characters of the recipient's user name and then, if Outlook can match the characters you typed with a user name, Outlook fills in the remainder of the name for you automatically. When an underline appears beneath a name in the To text box, this indicates that Outlook has verified the name in the postoffice.

If you are not sure how to spell the recipient's name or you do not type well, you might prefer to use the To button to address your message. When you click the To button, the Select Names dialog box, shown in Figure 2-3, appears. Simply select the name of the recipient from the list.

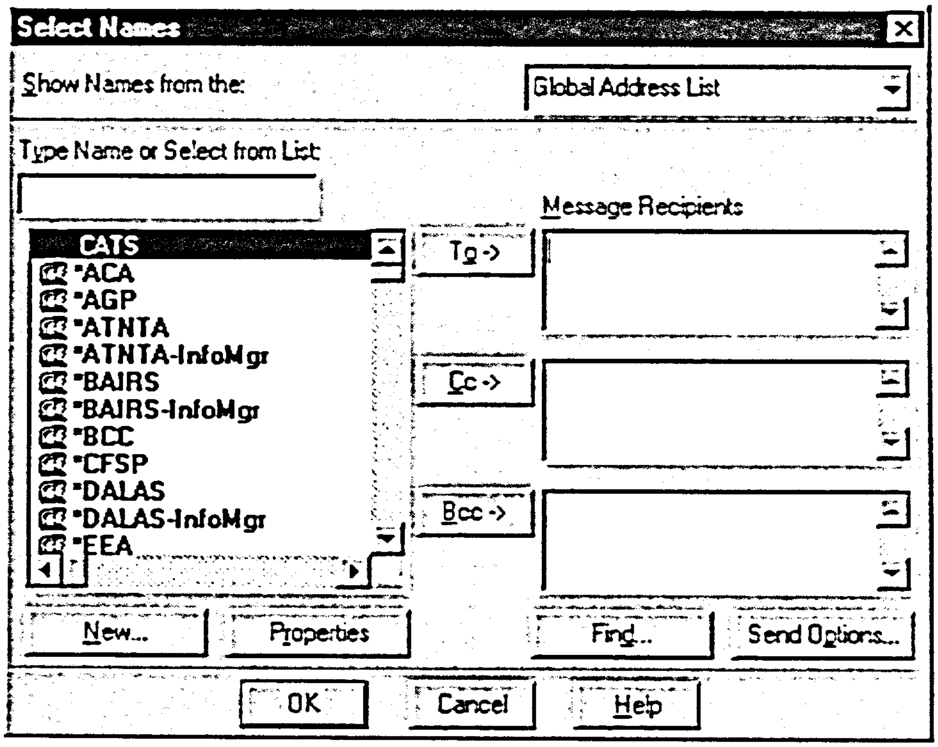


Figure 2-3: *The Select Names Dialog Box*

You should always type a short subject in the Subject text box. Your subject becomes the text in the line that the recipient sees in his or her message list when not using AutoPreview or the first line when using AutoPreview.

You can move from field to field by pressing TAB or by positioning the mouse pointer in the desired field and clicking the mouse button. After you've finished addressing the message, you can move to the message area and type your message.

METHOD

To address and type a message:

Check names method

1. In any Mail folder, on the Standard toolbar, click the New Mail Message button.
2. In the New Message window, in the To text box, type the recipient's user name.
3. If sending the message to multiple recipients, type , (comma) or type ; (semicolon), and then enter the next name.
4. Repeat step 3 as necessary.
5. If desired, in the Cc text box, type a user name(s).
6. In the Subject text box, type a short subject.
7. In the message area, type the text of your message.

Note: When you type the first few characters of the recipient's user name, Outlook can sometimes identify a match for the characters entered, and you need not type the full name.

Dialog box method

1. In any Mail folder, on the Standard toolbar, click the New Mail Message button.
2. In the New Message window, choose To.
3. In the Select Names dialog box, select a name from the list.
4. Choose To.
5. Repeat steps 3 and 4 as necessary.
6. Choose OK.
7. If desired, choose Cc.
8. In the Select Names dialog box, select a name from the list.
9. Choose To.
10. Repeat steps 8 and 9 as necessary.
11. Choose OK.

12. In the Subject text box, type a short subject.
13. In the message area, type the text of your message.

EXERCISE

In the following exercise, you will address a message. Then, you will type your message.

1.	On the Standard toolbar, click the New Mail Message button	*The New Message window appears.*
2.	If necessary, maximize the New Message window	
3.	In the To text box, type your partner's user name	
4.	Choose Cc	*The Select Names dialog box appears.*
5.	Select your instructor's name	
6.	Choose Cc	
7.	Choose OK	*The New Message window reappears.*
8.	In the Subject text box, type **Mail Activated**	
9.	In the message area, type the following text, including the grammatical error: **My Microsoft Outlook post office has been activated. I look forward to communication with you electronically.**	

Note: Do not correct typing errors you might make.

END

Editing Text

After you type a message, you might need to make some changes before you mail the message. There might be misspelled words or grammatical errors. You might decide to add or delete text. In Outlook, you can *edit*—insert, delete, and replace text—in any message you are composing.

The procedure for inserting and deleting text in Outlook is the same as in most Windows word-processing applications. You add text by placing the insertion point where you want to insert the text and typing the text. You move the insertion point by positioning the I-beam and clicking the mouse or by using the arrow keys. There are two ways to delete text. You can position the insertion point in the correct location and press **DELETE** or **BACKSPACE**, or you can select the text with the I-beam (drag the mouse to highlight the desired text) and press **DELETE**

Selecting text and then typing the replacement text lets you replace many characters quickly. You can easily replace a single word or a block of text ranging from a few words to several paragraphs.

METHOD

To insert text:

1. Position the insertion point where you want to insert the text.
2. Type the text.

To delete text:

1. Position the insertion point behind the first character you want to delete.
2. Press **BACKSPACE**

   or

1. Position the insertion point in front of the first character you want to delete.
2. Press **DELETE**

   or

1. Position the I-beam in front of the first character you want to delete.
2. Drag the I-beam over the text to be deleted.
3. Press **BACKSPACE** or **DELETE**

To replace a block of text:

1. Position the I-beam in front of the first character you want to replace.
2. Drag the I-beam over the text to be replaced.
3. Type the replacement text.

To replace a word:

1. Double-click the word.
2. Type the replacement text.

EXERCISE

In the following exercise, you will edit text.

1.	In the message you just typed, in the first sentence, place the insertion point between the word *activated* and the period	
2.	Press **SPACEBAR** and then type **today**	*The text is inserted, and existing text is pushed forward.*
3.	Place the insertion point after the word *communication* in the second sentence	
4.	Press **BACKSPACE** twice	*Two letters are deleted.*
5.	Without moving the insertion point, type **ng**	*Two letters are inserted.*
6.	In the first sentence, position the I-beam in front of the *h* in the word *has*	
7.	Drag to select the words *has been*	
8.	Type **is**	*The text is replaced.*

9.	In the second sentence, double-click the word *electronically*	*The word is selected.*
10.	Type **via e-mail**	*The word is replaced.*

END

Formatting Text

The Formatting toolbar in the New Message window lets you bold, italicize, and underline text. You can also change the color of the text, add bullets, and change the alignment. In addition, you can change your font with the Font and Font Size drop-down lists. Table 2-5 describes the buttons on the formatting toolbar.

Button	Name	Function
	Font Color	Displays selected text in a color. Clicking the drop-down arrow displays a color palette from which to select the font color.
	Bold	**Bolds** the selected text.
	Italic	*Italicizes* the selected text.
	Underline	<u>Underlines</u> the selected text.
	Align Left	Left-aligns selected text in the message.
	Center	Center-aligns selected text in the message.
	Align Right	Right-aligns selected text in the message.
	Justify	Aligns selected text to left and right margins.
	Bullets	Changes the selected text to bulleted text so that it starts with a bullet.
	Decrease Indent	Decreases the indentation of the text.
	Increase Indent	Increases the indentation of the text.

Table 2-5: *Formatting Toolbar Buttons*

Note: Many other mail programs can process only *ASCII*, or plain text, messages. Users of these programs will not see your formatting.

METHOD

To format text:

1. Select the text you want to format.
2. If desired, on the Formatting toolbar, click the desired button.
3. If desired, from the Font drop-down list, select a font.
4. If desired, from the Font Size drop-down list, select a font size.

EXERCISE

In the following exercise, you will format text.

1.	In the first sentence, select the word *Outlook*	*The word is highlighted.*
2.	On the Formatting toolbar, click the Italic button	*The word is italicized.*
3.	In the second sentence, select the words *via e-mail*	*The words are highlighted.*
4.	On the Formatting toolbar, click the Font Color button	*The color palette is displayed.*
5.	Choose Blue	*The words are colored blue.*
6.	Select the word *today*	*The word is highlighted.*
7.	From the Font drop-down list, select any font	*The font for the word is changed.*
8.	From the Font size drop-down list, select 12	*The font size for the word is changed to 12 points.*
9.	On the Formatting toolbar, click the Center button	*The message is centered.*
10.	On the Formatting toolbar, click the Align Right button	*The message is right-aligned.*
11.	On the Formatting toolbar, click the Align Left button	*The message is left-aligned.*

END

Working with Signatures

You can include your name, a standard message, or any other text at the end of messages you send by using Outlook's *Signature* feature. Depending on the type of messages you send, you might want to create several signatures. For example, first, you might create a formal signature that contains your first and last names and your title to use for messages to clients or others with whom you are not well acquainted. Next, you might also create an informal signature that includes only your first name for contacts you know well. You can create a signature from scratch, or you can base the signature on a file that is the same file format as your message file format.

You can create signatures at any time when you are working in Outlook. To begin creating signatures, you need to access the Options dialog box. If you want to create signatures when you are working in a new message window, you can open the Options dialog box by switching to the mail folder from which you opened the message window and then choosing Options from the Tools menu. From the Options dialog box, you access the Signature Picker dialog box, shown in Figure 2-4, and the Create New Signature dialog box, shown in Figure 2-5. From the Create New Signature dialog box, you also need to access the Edit Signature dialog box, shown in Figure 2-6. Once you create your signature(s) and close the Options dialog box, you can switch back to the new message window and choose a signature to include with the message.

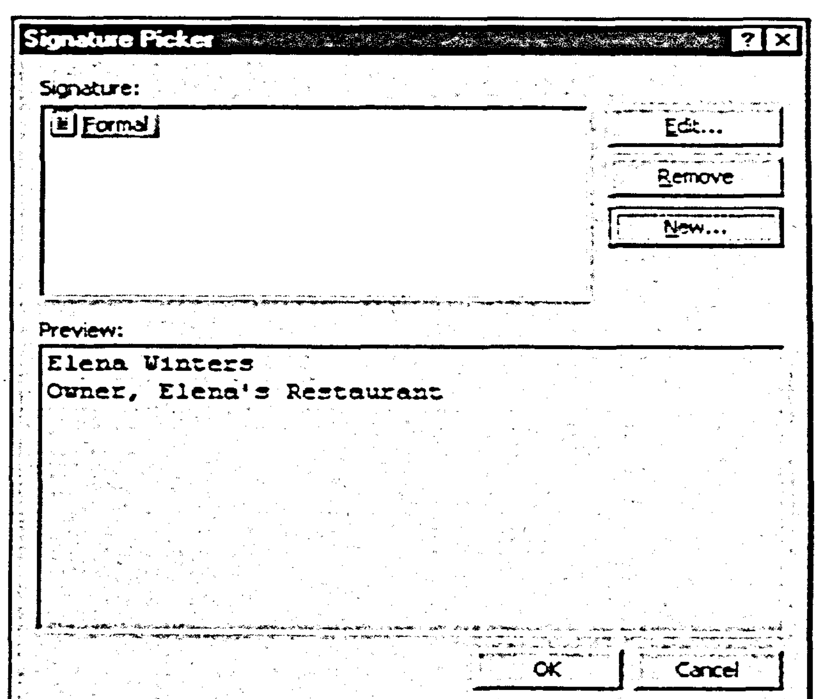


Figure 2-4: *The Signature Picker Dialog Box*

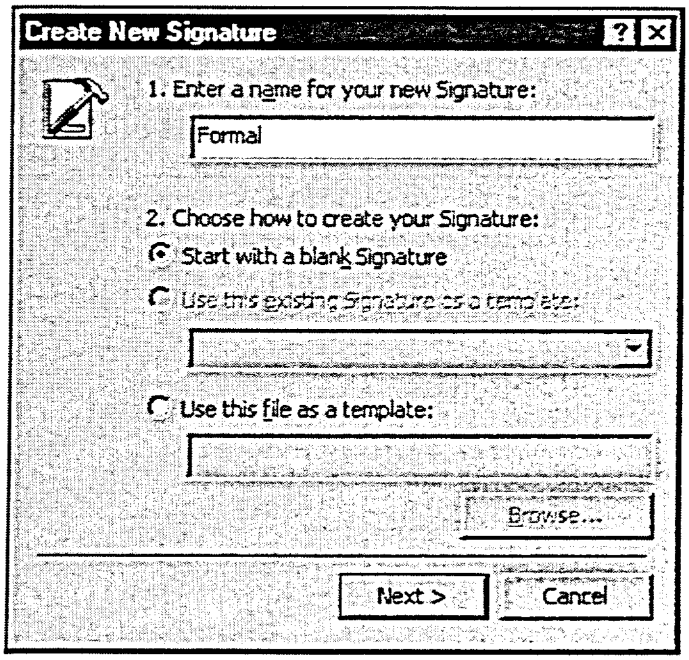


Figure 2-5: *The Create New Signature Dialog Box*

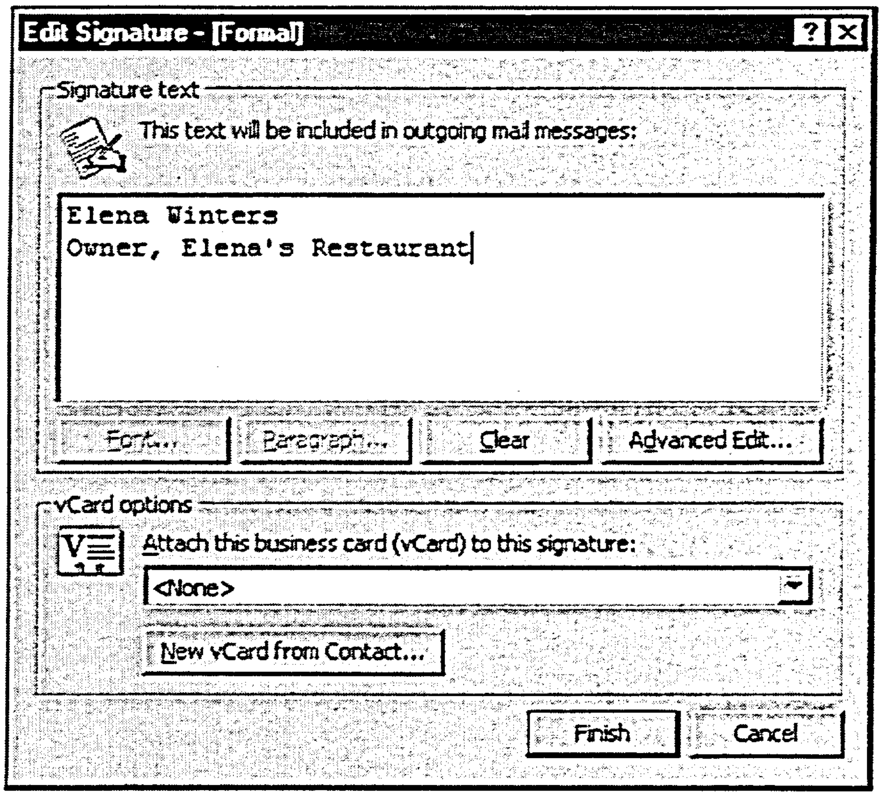


Figure 2-6: *The Edit Signature Dialog Box*

If you decide you don't want to use a signature after it has been created, you can remove the signature from the list of signatures. Deleting a signature from the list has no effect on the content of messages in which you have included the signature.

METHOD

To create signatures

1. If necessary, from the new message window, switch to the mail folder from which you opened the window.
2. In the mail folder, from the Tools menu, choose Options.
3. In the Options dialog box, select the Mail Format tab.
4. On the Mail Format page, in the Signature area, choose Signature Picker.
5. In the Signature Picker dialog box, choose New.
6. In the Create New Signature dialog box, in the *Enter a name for your new Signature* text box, type a name for the signature.
7. If necessary, in the *Choose how to create your Signature* area, select the desired option button and, if required, select a template signature or file.
8. Choose Next.
9. In the Edit Signature dialog box, in the Signature text area, in the *This text will be included in outgoing mail messages* text box, type the text for the signature.
10. If desired, in the vCard options area, select or define a business card to attach to the signature.
11. Choose Finish.
12. If desired, repeat steps 5 through 11 to define additional signatures.
13. In the Signature Picker dialog box, choose OK.
14. In the Options dialog box, choose OK.

To include a signature with a message

1. If necessary, open or switch to a new message window.
2. As desired, create the message.
3. Position the insertion point where you want the signature to appear.
4. On the Standard toolbar, click the Signature button.
5. From the Signature menu, choose the desired signature.

To remove signatures

1. If necessary, from the new message window, switch to the mail folder from which you opened the window.
2. In the mail folder, from the Tools menu, choose Options.
3. In the Options dialog box, select the Mail Format tab.
4. On the Mail Format page, in the Signature area, choose Signature Picker.
5. If necessary, in the Signature Picker dialog box, in the Signature list, select a signature to delete.
6. Choose Remove.
7. In the message box that asks, *Are you sure you want to permanently remove this Signature?* choose Yes.
8. As desired, repeat steps 5 through 7 to delete additional signatures.
9. In the Signature Picker dialog box, choose OK.
10. In the Options dialog box, choose OK.

EXERCISE

In the following exercise, you will work with signatures.

First, you will create signatures.

1. From the new message window, use the taskbar to switch to the Sent Items folder	
2. From the Tools menu, choose Options	*The Options dialog box appears.*
3. Select the Mail Format tab	*The Mail Format page appears.*
4. In the Signature area, choose Signature Picker	*The Signature Picker dialog box appears.*
5. Choose New	*The Create New Signature dialog box appears.*
6. In the Enter a name for your new Signature text box, type **Formal**	

7. If necessary, in the *Choose how to create your Signature* area, select the Start with a blank Signature option button

8. Choose Next — *The Edit Signature – [Formal] dialog box appears.*

9. In the Signature text area, in the *This text will be included in outgoing mail messages* text box, type your first and last names, press **Enter**, and then type your job title — *A two line formal signature is created.*

10. Choose Finish — *The Edit Signature dialog box closes, and the Signature Picker dialog box reappears. The new signature is listed in the dialog box and appears in the Preview window.*

11. Following the procedure described above, name and create a second signature that includes only your first name or nickname — *Two signatures are listed in the Signature Picker dialog box.*

12. In the Signature Picker dialog box, choose OK — *The Options dialog box reappears.*

13. Choose OK — *The dialog box closes, and the Sent Items folder reappears.*

Next, you will include a signature with a message.

14. Use the taskbar to switch to the new message window

15. Position the insertion point at the end of the message, and then press ENTER twice — *The insertion point moves down two lines.*

16. On the Standard toolbar, click the Signature button — *The Signature menu appears.*

17. Choose Formal — *Your Formal signature is inserted into the message.*

Now, you will remove signatures.

18. From the new message window, use the Windows NT taskbar to switch to the Sent Items folder	
19. From the Tools menu, choose Options	*The Options dialog box appears.*
20. Select the Mail Format tab	*The Mail Format page appears.*
21. In the Signature area, choose Signature Picker	*The Signature Picker dialog box appears.*
22. In the Signature list, select Formal	
23. Choose Remove	*A message box that asks,* ***Are you sure you want to permanently remove this Signature?*** *appears.*
24. Choose Yes	*The message box closes, and the signature is deleted.*
25. Following the procedure described above, remove the second signature from the list	
26. In the Signature Picker dialog box, choose OK	*The Options dialog box reappears.*
27. Choose OK	*The dialog box closes, and the Sent Items folder reappears.*
28. Use the taskbar to switch to the new message window	*The signature still appears in the message.*

END

Sending a Message

When you have finished typing the message, click the Send button on the toolbar. When you click the Send button, Outlook places your message in the Outbox. At regular intervals, the network checks your Outbox and sends the messages it contains. You can then find your message in the Sent Items folder.

You can set an option from the Tools menu to run a final spelling check when you send your message. If you set this option, then, when you send your message, if you still have a misspelled word, the Spelling dialog box, shown in Figure 2-7, appears, and it shows you your errors.

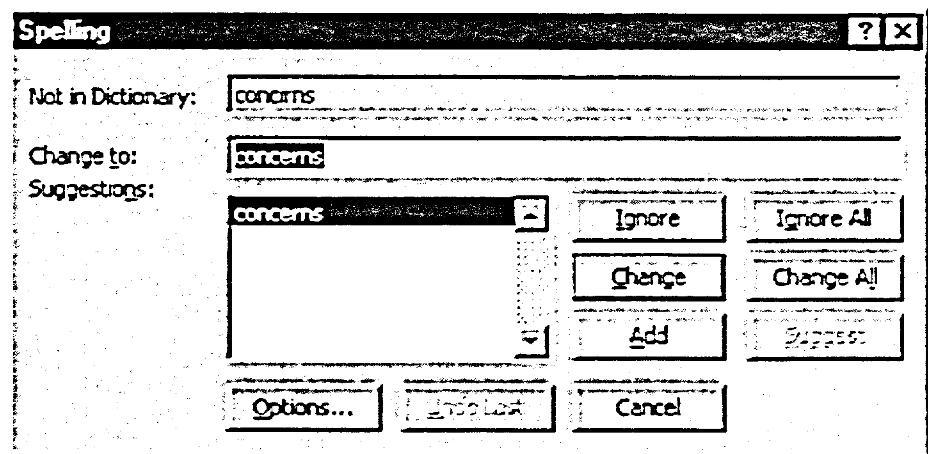


Figure 2-7: *The Spelling Dialog Box*

METHOD

To send a message:

1. In the New Message window, on the Standard toolbar, click the Send button.
2. If necessary, in the Spelling dialog box, examine the word that appears in the Not in Dictionary area.
3. If the word is spelled correctly, choose Ignore or Ignore All to accept the word for this message only or choose Add to add the word to your custom dictionary.
   or
3. If the word is spelled incorrectly, in the Suggestions area, select the correctly spelled word, if available, or correct the spelling in the Change to text field.

4. Choose Change or Change All to correct the spelling for this message.
5. Repeat steps 2 through 4 as necessary.

EXERCISE

In the following exercise, you will send a message.

1.	Make sure the message is still open	
2.	On the toolbar, click the Send button	*The Spelling dialog box appears. The Not in Dictionary area displays the word **concirns**. The Suggestions area suggests the word with the correct spelling.*
3.	Choose Change	*The spelling error is corrected.*
4.	If your name appears, choose Add	*Your name is added to the Custom Dictionary.*
5.	If necessary, correct spelling errors you made while entering the message text	*The message is sent.*

END

Forwarding and Replying to Messages

Outlook lets you forward and reply to messages that you receive. If you want to forward a message to someone who did not receive the original, use the Forward button on the toolbar. The Reply to Sender button lets you respond to the originator of the message, while the Reply to All button lets you respond to all the individuals who received the message.

Forwarding a Message

When you open a message and then click the Forward button, a New Message window opens containing the message you want to forward, as shown in Figure 2-8. The title bar shows an envelope icon followed by the letters FW: and then displays the subject of the original message. After you address the message, you can add a comment at the top of the message area and then send it.

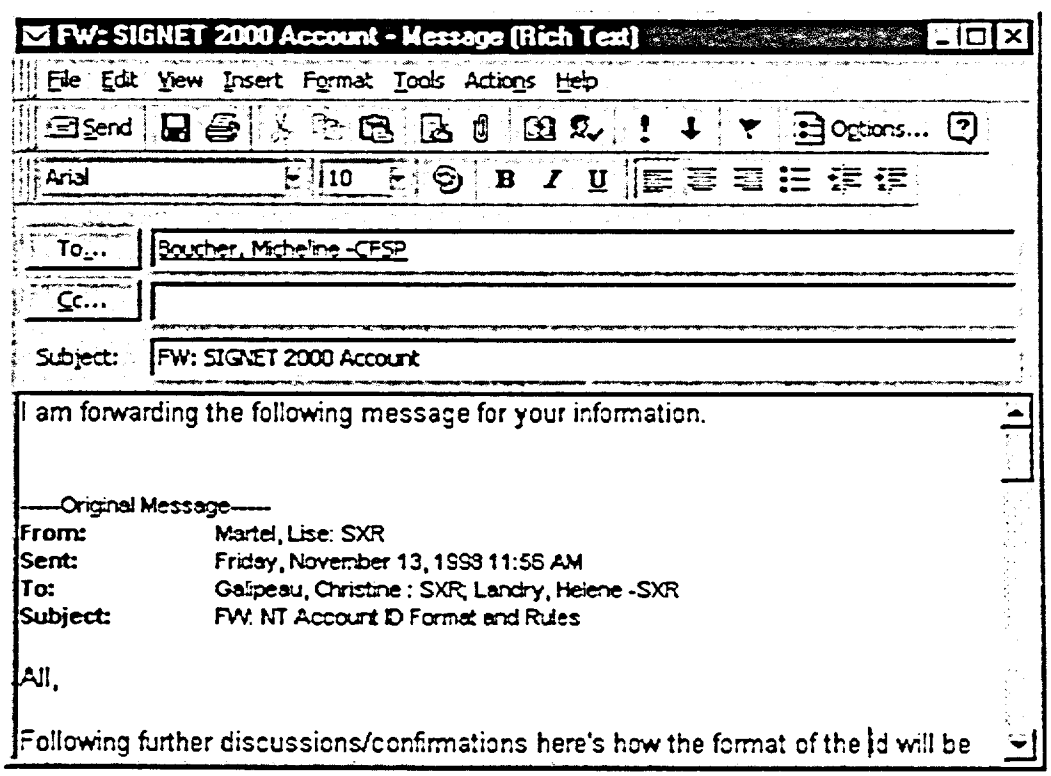


Figure 2-8: *The New Message Window When You Forward a Message*

METHOD

To forward a message:

1. Open the original message.
   or
1. In the message list, select the message.
2. On the Standard toolbar, click the Forward button.
3. Address the message.
4. If desired, at the top of the message area, type comments.
5. Send the message.

EXERCISE

In the following exercise, you will forward a message.

1.	In the Outlook Bar, click the Inbox shortcut	
2.	If necessary, check for new messages	
3.	In the message list, double-click the message your mail partner just sent you	*The message opens.*
4.	On the Standard toolbar, click the Forward button	*The message appears in the New Message window.*
5.	Follow your instructor's directions to address the message to someone else.	
6.	At the top of the message area, type **Look! [Your partner's name] has Outlook!**	
7.	Send the message	
8.	If necessary, close the original message	

END

Replying to a Message

When you reply to a message, you can reply to the originator only or you can reply to the originator and to everyone else who received the message. Click the Reply to Sender button to respond to the originator, or click the Reply to All button to respond to the originator and to everyone else who received the message. Figure 2-9 shows the New Message window when you reply to a message.

When you click a Reply button, a New Message window opens, just as it does when you are forwarding a message. In this case, however, the To text box is filled in for you with the original sender's address or the sender and all the recipients' addresses, and the insertion point is automatically positioned at the top of the message area.

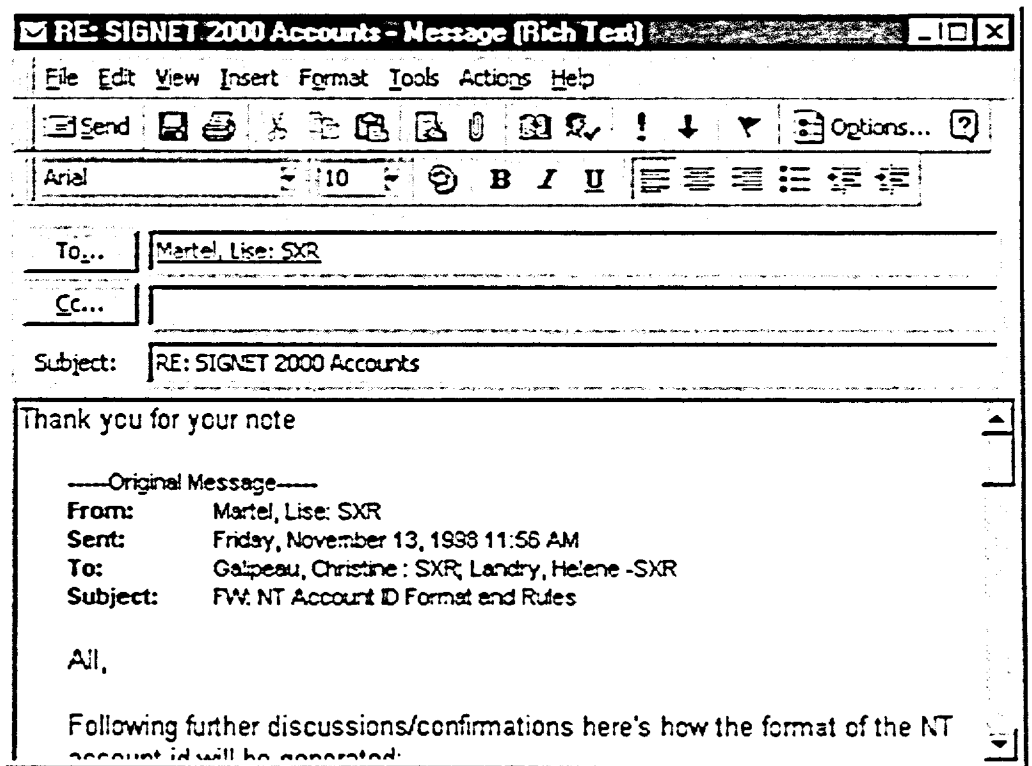


Figure 2-9: *The New Message Window When You Reply to a Message*

METHOD

To reply to a message:

1. Open the original message.
   or
1. In the message list, select the message.
2. On the Standard toolbar, click the Reply button.
   or
2. On the Standard toolbar, click the Reply to All button.
3. At the top of the message area, type your response.
4. Send the reply.

EXERCISE

In the following exercise, you will reply to a message.

1.	In the message list, open the message from your mail partner	
2.	On the Standard toolbar, click the Reply button	*The message appears in the New Message window with the original sender's name filled in and the insertion point positioned at the top of the original message area.*
3.	Type **Thanks for your note.**	
4.	Send the reply	
5.	If necessary, close the original message	

END

Managing Messages Using Folders

When your messages arrive, Outlook stores them in the Inbox. As messages accumulate, your Inbox can become a confusing jumble. To help you sort things out, you can create folders for orderly message storage.

After you've read a message, you can move it to a folder for storage or, if you don't need it anymore, you can delete it. Deleting messages saves you space in your mailbox.

You can manage your messages, and you can also manage data in other Outlook folders, using buttons on the Standard and Advanced toolbars. These buttons, summarized in Table 2-6, are common to all the Outlook folders.

Button	Name	Function
	Up One Level	Displays the folder one level above the subfolder in which you are working.
	Folder List	Toggles the folder list.
	Move to Folder	Moves a file from one folder to another.
	Delete	Removes the selected file from its folder and stores it in the Deleted Items folder. Permanently deletes the selected file from the Deleted Items folder.

Table 2-6: *The Outlook Folder Management Toolbar Buttons*

You open the My Shortcuts group folders from the Outlook Bar. But once you create subfolders, you might find it easier to use the folder list. The folder list displays a folder tree that looks like a folder tree you might see in Explorer and in My Computer. The Outlook folder list displays only the Outlook folders, as shown in Figure 2-10. When the folder list is collapsed, you see only the main folders. When the folder list is expanded, you see the subfolders, too. In the folder list, you can create new folders, move data from folder to folder, and delete and recover data.

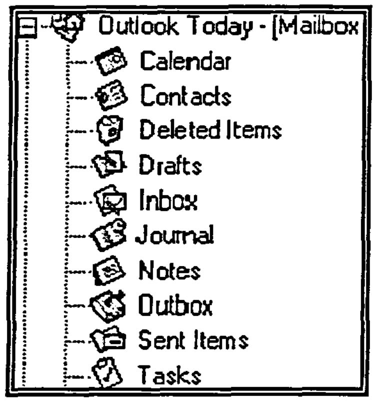


Figure 2-10: *A Collapsed Folder List*

Creating a Folder

As you collect more and more data, you might want to make additional folders in which to keep your records more neatly. For example, you might want to store messages related to one project in one folder and messages related to another project in another folder. And once you get on e-mail mailing lists, you can certainly use additional file folders in which to sort the mail you received and want to keep. To keep organized, you can create a new folder in the Create New Folder dialog box, shown in Figure 2-11.

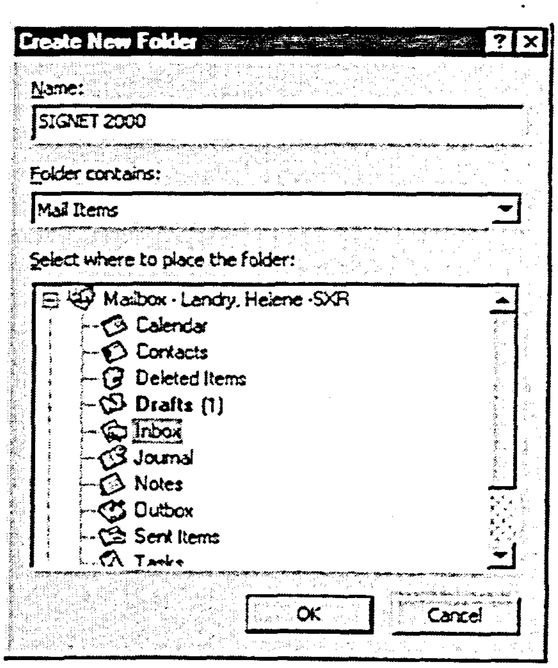


Figure 2-11: *The Create New Folder Dialog Box*

METHOD

To create a folder:

1. On the Advanced toolbar, click the Folder List button.
2. Select the folder to which you want to add a subfolder.
3. From the File menu, choose New, and from the New submenu, choose Folder.
4. In the Create New Folder dialog box, in the Name text box, type the name for the new subfolder.
5. Choose OK.

EXERCISE

In the following exercise, you will create new folders for your Inbox.

1.	On the Advanced toolbar, click the Folder List button	*The folder list appears.*
2.	Select the Inbox	*The message list appears.*
3.	From the File menu, choose New	*The New submenu appears.*
4.	Choose Folder	*The Create New Folder dialog box appears.*
5.	In the Name text box, type **Restaurant mail**	
6.	Choose OK	*The new folder appears in the folder list as a subfolder of the Inbox folder. The Inbox is selected.*
7.	From the File menu, choose New	*The New submenu appears.*
8.	Choose Folder	*The Create New Folder dialog box appears.*
9.	In the Name text box, type **Class**	
10.	Choose OK	*The second new subfolder appears in the folder list.*

END

Moving a Message to a Folder

Creating a folder hierarchy is helpful only if you use it to organize your messages. You should move a message from the Inbox to a long-term folder as soon as you read it and decide to keep it.

After you create new subfolders, you can move the messages you have stored in the Inbox folder to the subfolders you created. You can also move messages from one subfolder to another.

When you display the folder list, you can drag a message from one folder to another. You can also use the Move to Folder button on the toolbar to move files from one folder to another. The Move to Folder button displays a menu listing folders to which you have moved messages and also lets you access the Move Items dialog box. The Move Items dialog box, shown in Figure 2-12, lets you select any folder into which to move the selected file.

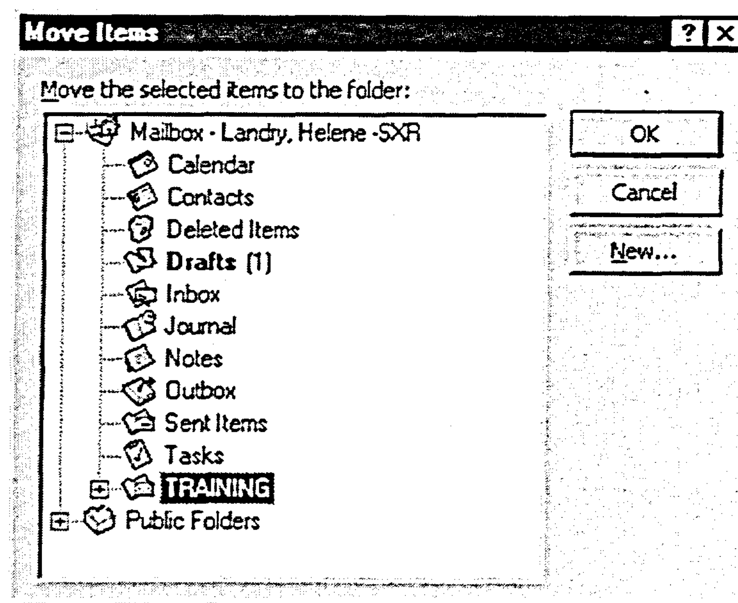


Figure 2-12: *The Move Items Dialog Box*

METHOD

To move a message to a folder:

Drag method

1. Display the folder list and expand it as necessary.
2. Drag the message to the appropriate folder.

Toolbar method

1. Select the message you want to move.
2. On the Standard toolbar, click the Move to Folder button.
3. From the menu, choose the appropriate folder.
   or
3. From the menu, choose Move to Folder.
4. In the Move Items dialog box, expand the folder list as necessary, and then select the appropriate folder.
5. Choose OK.

EXERCISE

In the following exercise, you will move messages to a folder.

1.	From the message list, drag the message from your partner to the **Class** folder	*The message is moved and disappears from the Inbox message list.*
2.	Select the Outlook message	
3.	On the Standard toolbar, click the Move to Folder button	*A menu appears.*
4.	Choose Move to Folder	*The Move Items dialog box appears.*
5.	Make sure the **Class** folder is selected, and then choose OK	*The message is moved and disappears from the Inbox message list.*
6.	In the folder list, select the **Class** folder	*Your partner's message and the Outlook message appear in the message list.*

END

Deleting and Restoring a Message

A cluttered Inbox makes it difficult to locate specific messages. You should delete messages you don't want to keep. You might want to review the messages in all folders periodically and delete messages that are no longer relevant. If you have a message you no longer want, you can delete it using the Delete button on the Standard toolbar.

Deleted items go to the Deleted Items folder. If you want to recover an item from the Deleted Items folder, you can easily select and restore it. But once you delete items from the Deleted Items folder, Outlook removes them completely from your computer. They do not go to the Recycle Bin and are no longer retrievable.

If you receive a notice that your mailbox is running out of space, you should check your Deleted Items folder for items that you can permanently delete.

METHOD

To delete an item and hold it:

1. Select the item you want to delete.
2. On the Standard toolbar, click the Delete button.

To restore deleted items:

1. Open the Deleted Items folder.
2. Select the item(s) you want to restore.
3. On the Standard toolbar, click the Move to Folder button.
4. From the menu, if the folder is listed, choose the folder.
   or
4. From the menu, if the folder is not listed, choose Move to Folder.
5. If necessary, in the Move Items dialog box, in the *Move the selected items to the folder:* list, select the folder and then choose OK.

To permanently delete items:

1. Open the Deleted Items folder.
2. Select the item(s) you want to delete permanently.
3. On the Standard toolbar, click the Delete button.
4. In the Office Assistant balloon or the message box, choose Yes.

EXERCISE

In the following exercise, you will delete and restore items.

1.	Make sure the **Class** folder is open	
2.	Select the **Outlook** message	
3.	On the Standard toolbar, click the Delete button	*The message is deleted.*
4.	Open the Deleted Items folder	*The message appears in the list.*
5.	Select the **Outlook** message	
6.	On the Standard toolbar, click the Move to Folder button	*The menu appears.*
7.	Choose Class	*The message is moved to the **Class** folder and disappears from the Deleted Items list.*
8.	Open the **Class** folder	*The message is restored.*
9.	Open the Sent Items folder	*The message list appears.*
10.	Delete the message to Linda Elengold	
11.	Open the Deleted Items folder	*The deleted message appears in the list.*
12.	Select the message	
13.	On the Standard toolbar, click the Delete button	*A message box that asks **Are you sure that you want to permanently delete the selected item(s)?** appears.*
14.	Choose Yes	*The message is permanently deleted.*
15.	On the Advanced toolbar, click the Folder List button	*The folder list closes.*

END

Section 2 Summary

To preview messages:

1. If necessary, on the Outlook Bar, click the Inbox shortcut.
2. On the Advanced toolbar, click the AutoPreview button.
   or
2. From the View menu, choose AutoPreview.

To display the Preview Pane:

1. From the View menu, choose Preview Pane.

To open a message:

1. If necessary, on the Outlook Bar, click the Inbox shortcut.
   or
1. On the taskbar, double-click the envelope icon.
2. In the message list, double-click the message.

To select a message:

1. In the message list, click the message.

To print a message:

1. Open the message.
   or
1. In the message list, select the message.
2. On the Standard toolbar, click the Print button.

To close a message:

1. In the Message window, click the Close button.

To sort messages:

1. In the message list, click the desired column header.
2. If desired, click the column header again to change the sort order.

To filter messages:

1. On the Advanced toolbar, click the Current View drop-down list arrow.
2. From the drop-down list, select a filter.
3. If necessary, in the message box, select an option button, and then choose OK.

To address and type a message:

Check names method
1. In any Mail folder, on the Standard toolbar, click the New Mail Message button.
2. In the New Message window, in the To text box, type the recipient's user name.
3. If sending the message to multiple recipients, type , (comma) or type ; (semicolon), and then enter the next name.
4. Repeat step 3 as necessary.
5. If desired, in the Cc text box, type a user name(s).
6. In the Subject text box, type a short subject.
7. In the message area, type the text of your message.

Dialog box method
1. In any Mail folder, on the Standard toolbar, click the New Mail Message button.
2. In the New Message window, choose To.
3. In the Select Names dialog box, select a name from the list.

4. Choose To.
5. Repeat steps 3 and 4 as necessary.
6. Choose OK.
7. If desired, choose Cc.
8. In the Select Names dialog box, select a name from the list.
9. Choose To.
10. Repeat steps 8 and 9 as necessary.
11. Choose OK.
12. In the Subject text box, type a short subject.
13. In the message area, type the text of your message.

To insert text:

1. Position the insertion point where you want to insert the text.
2. Type the text.

To replace a block of text:

1. Position the I-beam in front of the first character you want to replace.
2. Drag the I-beam over the text to be replaced.
3. Type the replacement text.

To replace a word:

1. Double-click the word.
2. Type the replacement text.

To delete text:

1. Position the insertion point behind the first character you want to delete.
2. Press BACKSPACE

or

1. Position the insertion point in front of the first character you want to delete.
2. Press DELETE

or

1. Position the I-beam in front of the first character you want to delete.
2. Drag the I-beam over the text to be deleted.
3. Press BACKSPACE or DELETE

To format text:

1. Select the text you want to format.
2. If desired, on the Formatting toolbar, click the desired button.
3. If desired, from the Font drop-down list, select a font.
4. If desired, from the Font Size drop-down list, select a font size.

To create signatures

1. If necessary, from the new message window, switch to the mail folder from which you opened the window.
2. In the mail folder, from the Tools menu, choose Options.
3. In the Options dialog box, select the Mail Format tab.
4. On the Mail Format page, in the Signature area, choose Signature Picker.
5. In the Signature Picker dialog box, choose New.
6. In the Create New Signature dialog box, in the *Enter a name for your new Signature* text box, type a name for the signature.
7. If necessary, in the *Choose how to create your Signature* area, select the desired option button and, if required, select a template signature or file.
8. Choose Next.
9. In the Edit Signature dialog box, in the Signature text area, in the *This text will be included in outgoing mail messages* text box, type the text for the signature.
10. If desired, in the vCard options area, select or define a business card to attach to the signature.
11. Choose Finish.
12. If desired, repeat steps 5 through 11 to define additional signatures.

13. In the Signature Picker dialog box, choose OK.
14. In the Options dialog box, choose OK.

To include a signature with a message

1. If necessary, open or switch to a new message window.
2. As desired, create the message.
3. Position the insertion point where you want the signature to appear.
4. On the Standard toolbar, click the Signature button.
5. From the Signature menu, choose the desired signature.

To remove signatures

1. If necessary, from the new message window, switch to the mail folder from which you opened the window.
2. In the mail folder, from the Tools menu, choose Options.
3. In the Options dialog box, select the Mail Format tab.
4. On the Mail Format page, in the Signature area, choose Signature Picker.
5. If necessary, in the Signature Picker dialog box, in the Signature list, select a signature to delete.
6. Choose Remove.
7. In the message box that asks, *Are you sure you want to permanently remove this Signature?* choose Yes.
8. As desired, repeat steps 5 through 7 to delete additional signatures.
9. In the Signature Picker dialog box, choose OK.
10. In the Options dialog box, choose OK

To send a message:

1. In the New Message window, on the Standard toolbar, click the Send button.
2. If necessary, in the Spelling dialog box, examine the word that appears in the Not in Dictionary area.
3. If the word is spelled correctly, choose Ignore or Ignore All to accept the word for this message only or choose Add to add the word to your custom dictionary.
   or
3. If the word is spelled incorrectly, in the Suggestions area, select the correctly spelled word, if available, or correct the spelling in the Change to text field.
4. Choose Change or Change All to correct the spelling for this message.
5. Repeat steps 2 through 4 as necessary.

To forward a message:

1. Open the original message.
   or
1. In the message list, select the message.
2. On the Standard toolbar, click the Forward button.
3. Address the message.
4. If desired, at the top of the message area, type comments.
5. Send the message.

To reply to a message:

1. Open the original message.
   or
1. In the message list, select the message.
2. On the Standard toolbar, click the Reply button.
   or
2. On the Standard toolbar, click the Reply to All button.

3. At the top of the message area, type your response.
4. Send the reply.

To create a folder:

1. On the Advanced toolbar, click the Folder List button.
2. Select the folder to which you want to add a subfolder.
3. From the File menu, choose New, and from the New submenu, choose Folder.
4. In the Create New Folder dialog box, in the Name text box, type the name for the new subfolder.
5. Choose OK.

To move a message to a folder:

Drag method

1. Display the folder list and expand it as necessary.
2. Drag the message to the appropriate folder.

Toolbar method

1. Select the message you want to move.
2. On the Standard toolbar, click the Move to Folder button.
3. From the menu, choose the appropriate folder.
   or
3. From the menu, choose Move to Folder.
4. In the Move Items dialog box, expand the folder list as necessary, and then select the appropriate folder.
5. Choose OK.

To delete an item and hold it:

1. Select the item you want to delete.
2. On the Standard toolbar, click the Delete button.

To restore deleted items:

1. Open the Deleted Items folder.
2. Select the item(s) you want to restore.
3. On the Standard toolbar, click Move to Folder button.
4. From the menu, if the folder is listed, choose the folder.
   or
4. From the menu, if the folder is not listed, choose Move to Folder.
5. If necessary, in the Move Items dialog box, in the *Move the selected items to the folder:* list, select the folder and then choose OK.

To permanently delete items:

1. Open the Deleted Items folder.
2. Select the item(s) you want to delete permanently.
3. On the Standard toolbar, click the Delete button.
4. In the Office Assistant balloon or the message box, choose Yes.

Section 2 *Self-Check Exercise*

1. Address a new message to your partner with the subject **Food Drive.**

2. In the message area, type the following text (include the misspellings). Use the AutoComplete tip.

   Dear Sir or Madam:

   Next week we're holding our anual food drive for the Orleans Parish Food Bank. We need non-perishible food items. Please bring your foodto my restaurant.

3. In the second sentence, insert the words **canned food and other** before the word *non-perishable.*

4. In the third sentence (*Please bring…*), add a space between *donations* and *to*. Then replace the word *food* with **donations.**

5. Change the formatting of the *Orleans Parish Food Bank* to 14 point italic. Align the message to the right. Then realign the message to the left.

6. Delete your AutoSignature, and then create a new AutoSignature using your full name.

7. Correct the spelling and send the message.

8. Preview and read a new message. Print the message. Move the message to the **Restaurant mail** folder.

9. Open the **Olajuwan Farewell** message.

10. Forward the message to your partner, typing the following comment at the top of the message area: **Would you like to bring something?**

11. In the Inbox, move the **Olajuwan** message to the **Restaurant mail** folder.

12. Open the **Vendor Meeting** message.

13. Reply to the sender with the following comment added at the top of the message area: **I would like to attend.**

14. In the Sent Items folder, create a **Business Mail** subfolder and a **Personal Mail** subfolder.

15. File the Joan Berkson and the Anne Marble sent items in the **Business Mail** subfolder. File the Susan Crawford sent item in the **Personal Mail** subfolder.

16. Delete the Susan Crawford Sent Item from the Sent Items **Personal Mail** subfolder and then restore it to the same folder.

17. Permanently delete the **Vendor Meeting** message.

18. Close the folder list.

Section 3

Organizing Contacts

- Creating a Contact List
- Managing Contacts

Section Skills and Their Importance

In the following section you will learn to:

- **Create a contact list**
  Outlook stores your contact list—names, business and home addresses, phone and fax numbers, e-mail addresses, web sites, and more—and gives you direct access to those contacts. You can also enter and update relevant information, including additional notes and reminders.

- **Manage contacts**
  You can view and sort your contact list in several ways, hiding and showing only the fields you want. You can even use the contact list to help you remember the name of a person who works for the company that you want to call. You can update, organize, and retrieve your contact list, grouping and sorting it as you prefer.

Creating a Contact List

When you open the Contacts folder, Outlook displays the *contact list,* illustrated in Figure 3-1, in the information viewer. The contact list contains names, phone numbers, and other important information about your business and personal associates. With a contact list, you can store, update, organize, and retrieve your colleagues' contact information. If you forget a contact's name, you can look that person up another way, such as by workplace or by any other field listed in the contact information.

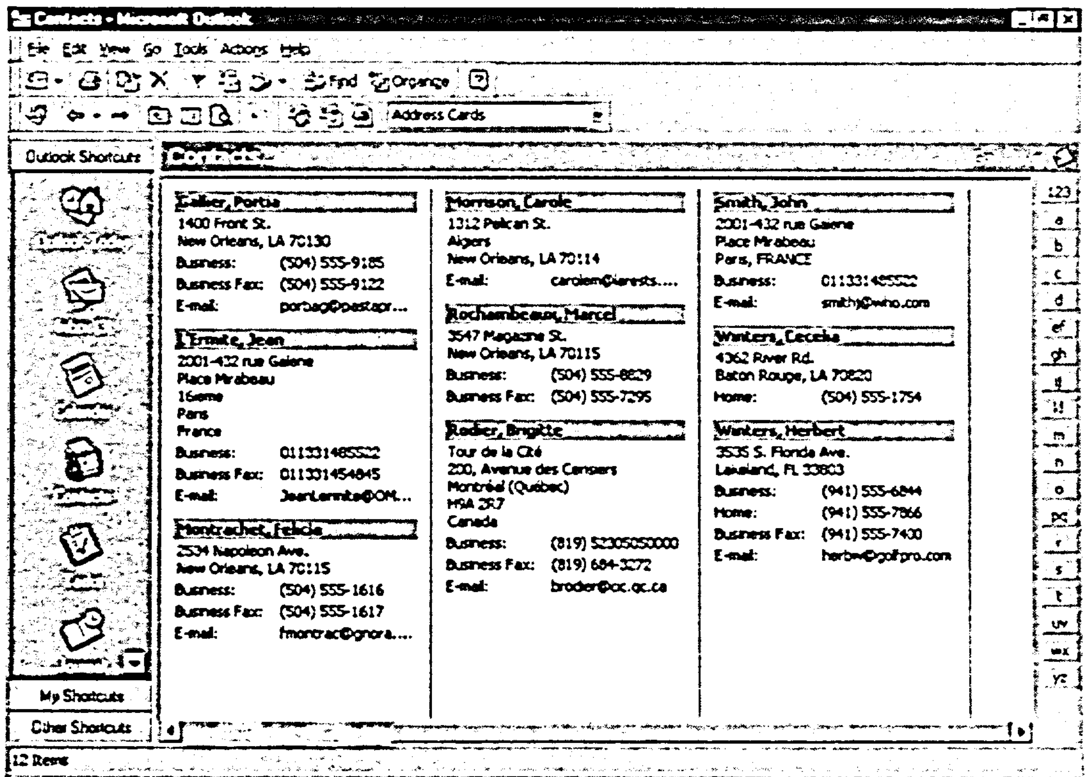


Figure 3-1: *The Contact List Displayed as Address Cards*

If you have more contacts stored in your folder than you can display at one time in the information viewer, you can click one of the alphanumeric tabs at the right of the screen to display the contact you want.

As in other Outlook folders, there are context-sensitive buttons on the toolbars that are available only in the Contacts folder. Table 3-1 describes the functions of these toolbar buttons.

Button	Name	Function
Standard Toolbar buttons		
	New Contact	Opens the New Contact window so that you can add a new contact address card. The drop-down arrow gives you access to the New windows for the other Outlook features.
	AutoDialer	If connected, places a call to your contact. The drop-down arrow displays the selected contact's phone numbers and gives you dialing options.
	New Message to Contact	Opens a New Message window addressed to the selected contact.
Advanced Toolbar buttons		
	New Meeting with Contact	Opens a New Meeting window addressed to the selected contact.
	New Task for Contact	Opens a New Task window assigned to the selected contact
	Explore Web Page	Opens the selected contact's web page.
	Current View	Filters your messages by Detailed Address Cards, Company, Location, and so forth. The drop-down arrow lets you select a filter.

Table 3-1: *The Contacts Toolbar Buttons*

Adding Contacts Manually

At the very least, your contact list should include names and phone numbers, but the more inclusive you make your list, the more helpful it can be to you. To add contacts, type your data into the New Contact window, illustrated in Figure 3-2, selecting tabs as appropriate to enter additional details.

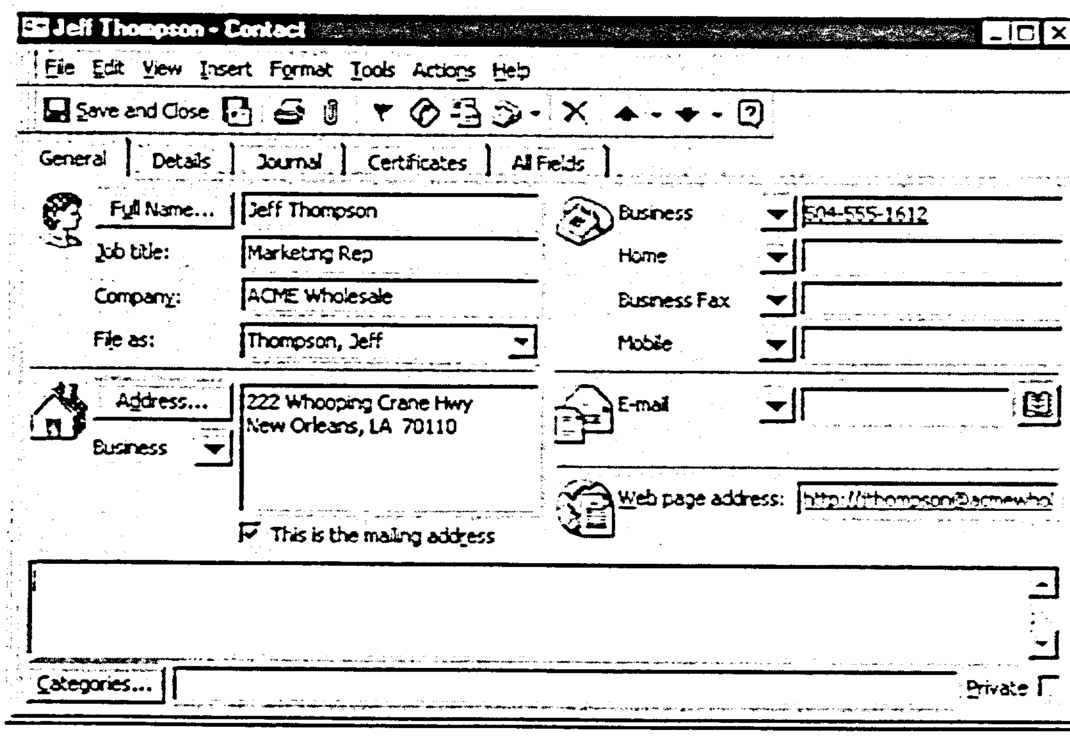


Figure 3-2: *The New Contact Window*

When you enter all the information in the New Contact window and save it, Outlook stores each contact in the contact list as an *address card.* Address cards in the contact list simulate business cards in your rotary or card file.

The Contact window has toolbar buttons of its own. Table 3-2 summarizes the function of the toolbar buttons peculiar to the Contact window.

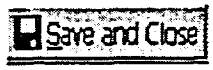
Button	Name	Function
	Save and Close	Saves the information in the window and closes the window.
	Save and New	Saves the information in the window and closes the window. Also opens a New Contact window.
	Insert File	Inserts a file in the large text box at the bottom of the window.
	Flag for Follow Up	Adds special text to the message to indicate that a follow-up action is required.
	Display Map of Address	Starts Internet Explorer and displays the Address Finder web page.
	New Message to Contact	Opens a message addressed to the contact
	AutoDialer	Starts Internet Explorer and displays the Address Finder web page
	Previous Item	Displays the previous Contact window. The drop-down arrow accesses the first item in the folder.
	Next Item	Displays the next contact window. The drop-down arrow accesses the last item in the folder.

Table 3-2: *The Contact Window Toolbar Buttons*

METHOD

To add contacts manually:

1. Open the Contacts folder.
2. On the Standard toolbar, click the New Contact button.
3. In the New Contact window, for all pages, fill in the text boxes, select the check boxes, and so forth, as appropriate.
4. On the toolbar, click the Save and Close button.
   or
4. On the toolbar, click the Save and New button to add another contact.

EXERCISE

In the following exercise, you will add contacts to your contact list manually.

1. From the Outlook Bar, open the Contacts folder — *The contact list appears in Address Cards view.*
2. On the Standard toolbar, click the New Contact button — *The New Contact window appears.*
3. Click on the Full Name... button
4. In the First: field, type **Jeff** use the TAB key to move to the Last: field and type **Thompson** then click on OK
5. In the Job title field type **Marketing Rep** and in the Company: field type **ACME Wholesale**
6. Click on the Address... button
7. In the Street field type **222 Whooping Crane Hwy,** in the City field type **New Orleans,** in the State/Province field type **LA** in the ZIP/Postal code field type **70110** then click on OK
8. Make sure the *This is the mailing address* check box is selected
9. In the Business field, type **504-555-1612**
10. In the E-mail field, type **jthompso@acmewhol.com**
11. On the toolbar, click the Save and Close button — *The contact list reappears.*
12. At the right of the screen, click the *t* alphanumeric button — *The **Jeff Thompson** address card appears in the contact list.*

13. Using the information shown in Table 3-3 as a guide, enter the first contact into your contact list

14. With your mail partner, select one of the remaining contacts for you to enter into your contact list and the other for your partner to enter, and then add the entry

END

Full Name	Job Title	Company	Business Address	City	State	Zip code	Business Phone number
Beth Wright	Marketing Rep	Kirk & Associates	1500 Veterans Memorial Blvd.	Metairie	LA	70005-2704	504-555-0296
Ray Martinez	Consultant	Kirk & Associates	334 Hardwin Ct.	Columbia	MD	21044-0928	410-555-7784
Judy Karras	Friend	JK Computer Services	9901 Ark Circle	Columbia	MD	21045-0012	410-555-1572

Table 3-3: *Contact List Information*

Selecting and Editing an Address Card

Your contacts might change jobs, get new phone numbers, or give you additional information that you want to store in your contact list. You can edit information in your contact list directly on the address card or in the Contact window.

METHOD

To select an address card:

1. Click the desired card.

To edit an address card:

1. Select the address card.
2. On the address card, type the changes.
   or
2. Double-click the address card.
3. In the Contact window, type the changes.
4. On the toolbar, click the Save and Close button.

EXERCISE

In the following exercise, you will edit address cards in your contact list.

1.	Make sure the Jeff Thompson address card is selected	*The address card is selected.*
2.	Click between the *H* and the *w* in *Hwy* in the business address	*The insertion point appears between the* ***H*** *and the* ***w*** *in* ***Hwy****.*
3.	Press BACKSPACE and then type **Pk**	*The business address is now* ***222 Whooping Crane Pkwy****.*
4.	Select the Beth Wright address card, and then double-click it	*The Beth Wright Contact window appears.*

5. In the large text box at the bottom of the window, type **Beth markets herbs and spices.**

6. On the toolbar, click the Save and Close button — *The Contact window closes and the changes are saved.*

END

Transmitting and Adding Contacts with E-mail

If colleagues have someone listed in their contact lists who you would like to include in your list too, your colleagues can e-mail the address card directly to you, just as you can e-mail similar cards to your colleagues. Then you can open the e-mail message and transfer the address card directly to your Contacts folder. Neither of you has to retype the information.

METHOD

To transmit contacts via e-mail:

1. Select the contact.
2. From the Actions menu, choose Forward.
3. In the New Message window, address and send the message.

To add contacts from e-mail:

1. Open the message with the address card.
2. Click the address card icon.
3. In the Message window, from the Edit menu, choose Copy.
4. Open the Contacts folder.
5. In the Contacts folder, from the Edit menu, choose Paste.

EXERCISE

In the following exercise, you will transmit and add contacts to your contact list with e-mail.

1. Make sure your contact list is open
2. Select the contact you created (and your mail partner did not create)
3. From the Actions menu, choose Forward

   The New Message window appears with the address card as an icon in the message area.
4. Address the new message to your partner, and then send it

5. Check for new mail, and then open your partner's message	
6. On your partner's message, click the address card icon	*The address card is selected.*
7. In the Message window, from the Edit menu, choose Copy	*The address card is copied to the Clipboard.*
8. Resize and reposition the Message window so you can see the Outlook bar	
9. Open the Contacts folder	
10. In the Contacts folder, from the Edit menu, choose Paste	*The address card is added to your contact list.*
11. On the taskbar, click the Message button to restore the Message window	
12. Close the Message window	

END

Managing Contacts

Besides organizing your contact list alphabetically by contact name, Outlook lets you view it by company name, location, and category. For example, if you cannot remember the name of a contact but do remember that person's workplace, you can view your contact list by company to find the contact. You can choose which fields you display and which you hide.

Showing and Hiding Fields

In the Contacts folder, you can view your contacts by address cards, phone list, category, company, or location. In addition, with the Show Fields dialog box, shown in Figure 3-3, you can change the fields that appear on the address cards.

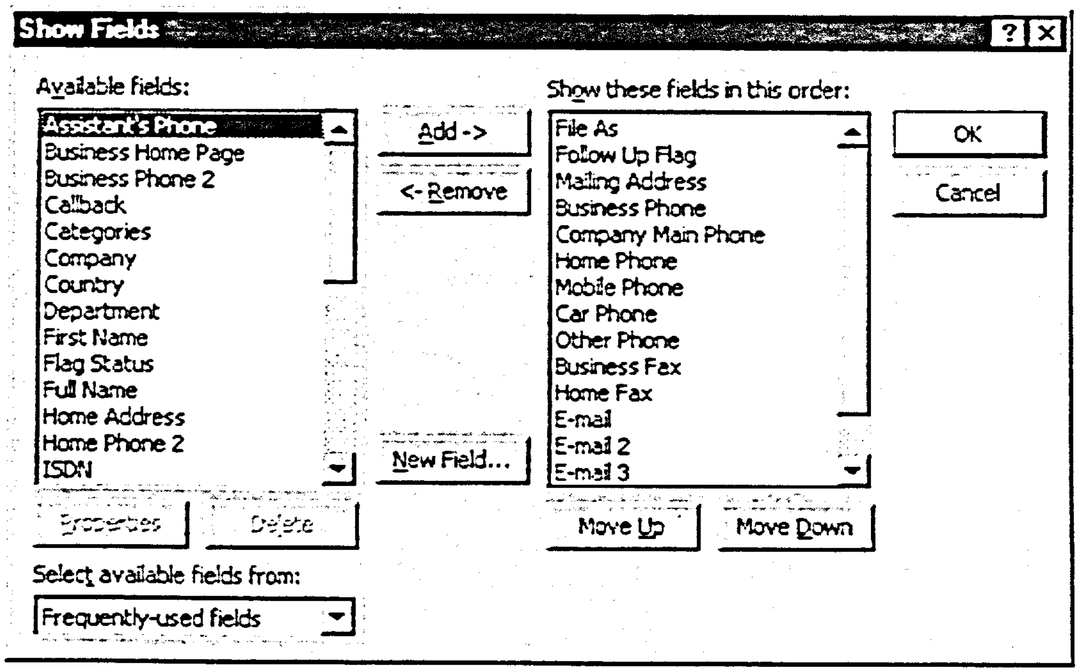


Figure 3-3: *The Show Fields Dialog Box*

METHOD

To show and hide fields:

1. From the View menu, choose Current View, Customize Current View.
2. On the View Summary dialog box, click the Fields button.
3. In the Show Fields dialog box, in the Available fields list box, select the field(s) you want to add to the view pane, and then choose Add.
   or
3. In the Show fields dialog box, in the *Show these fields in this order:* list box, select the field(s) you want to remove from the view pane, and then choose Remove.
4. If desired, choose New Field, and then create a new field.
5. If desired, in the *Show these fields in this order:* list, select a field and choose Move up or Move down.
6. Repeat step 4 as necessary to list the fields in the order you want them.
7. Choose OK.

EXERCISE

In the following exercise, you will show and hide fields.

1.	From the View menu, choose Current View, Curtomize Current View.	*The View Summary dialog box appears.*
2.	Click the Fields button.	*The Show Fields dialog box appears*
3.	In the Available fields list box, select Business Home Page	
4.	Choose Add	*Business Home Page appears at the bottom in the* ***Show these fields in this order:*** *list box*
5.	In the *Show these fields in this order:* list box, select Business Fax	

6. Choose Move Up repeatedly until Business Fax is below Company Main Phone in the list

7. Choose OK

The address cards show the Business Fax number on each card for which such a number is available.

END

Changing the Current View

Besides viewing address cards with one mailing address and a business and home phone number, you can change the Current View to display detailed address cards or a phone list that displays a contact with phone numbers but not addresses. You can group your contact list by company to find contacts whose name you forget.

When you change the Current View, you are applying a built-in filter. Table 3-4 summarizes the Contacts Current View filters.

Name	Function
Address Cards	Shows simple address cards for all contacts in the folder.
Detailed Address Cards	Shows detailed address cards for all contacts in the folder.
Phone List	Lists all contacts. You can sort the contacts by first or last name, company, and so forth.
By Category	Groups contacts by category.
By Company	Groups contacts by company.
By Location	Lists all contacts. You can sort the contacts by state and country as well as by first or last name, company, and so forth.
By Follow Up Flag	Groups contacts by flag. Also shows the due date for follow-up action for the flag.

Table 3-4: *The Contacts Current View Filters*

METHOD

To change the Current View:

Menu method

1. From the View menu, choose Current View.
2. From the Current View submenu, choose the desired view.

Advanced Toolbar method

1. Click the Current View drop-down list arrow.
2. From the drop-down list, select the view.

3. If necessary, in the Save View Settings message box, select the *Update the view "..." with the current View settings* option button.
4. Choose OK.

EXERCISE

In the following exercise, you will change the Current View of your contact list.

1.	Click the Current View drop-down list arrow	*The drop-down list appears.*
2.	Select Detailed Address Cards	*The Save View Settings message box might appear.*
3.	If necessary, select the *Update the view "Address Cards" with the current view settings* option button	
4.	Choose OK	*The address cards show more details.*
5.	Change the Current View to By Company	*The contacts are grouped by company.*
6.	If necessary, expand the list to show employees of Kirk & Associates	*Two names appear.*

END

Section 3 Summary

To add contacts manually:

1. Open the Contacts folder.
2. On the Standard toolbar, click the New Contact button.
3. In the New Contact window, for all pages, fill in the text boxes, select the check boxes, and so forth, as appropriate.
4. On the toolbar, click the Save and Close button.

   or

4. On the toolbar, click the Save and New button to add another contact.

To select an address card:

1. Click the desired card.

To edit an address card:

1. Select the address card.
2. On the address card, type the changes.

   or

2. Double-click the address card.
3. In the Contact window, type the changes.
4. On the toolbar, click the Save and Close button.

To transmit contacts via e-mail:

1. Select the contact.
2. From the Actions menu, choose Forward.
3. In the New Message window, address and send the message.

To add contacts from e-mail:

1. Open the message with the address card.
2. Click the address card icon.
3. In the Message window, from the Edit menu, choose Copy.
4. Open the Contacts folder.
5. In the Contacts folder, from the Edit menu, choose Paste.

To show and hide fields:

1. From the View menu, choose Current View, Customize Current View.
2. In the View Summary dialog box, click the Fields button.
3. In the Show Fields dialog box, in the Available fields list box, select the field(s) you want to add to the view pane, and then choose Add.

   or

3. In the Show fields dialog box, in the *Show these fields in this order:* list box, select the field(s) you want to remove from the view pane, and then choose Remove.
4. If desired, choose New Field, and then create a new field.
5. If desired, in the *Show these fields in this order:* list, select a field and choose Move up or Move down.
6. Repeat step 4 as necessary to list the fields in the order you want them.
7. Choose OK.

To change the Current View:

Menu method

1. From the View menu, choose Current View.
2. From the Current View submenu, choose the desired view.

Advanced Toolbar method

1. Click the Current View drop-down list arrow.
2. From the drop-down list, select the view.

3. If necessary, in the Save View Settings message box, select the *Update the view "..." with the current View settings* option button.
4. Choose OK.

Section 3 *Self-Check Exercise*

1. Add one of the following contacts to your contact list and arrange with your e-mail partner for your partner to add the other contact:

   Dr. Kelly Tucker, Nature's Best Bets, 1101 Chartres St, New Orleans, LA, 70116-2504, 504-555-9023.

   Charles Simon, Presto Pasta, 550 Esplanade Ave, New Orleans, LA 70116, 504-555-1094.

2. Send the contact you added in step 1 above to your e-mail partner.

3. Add the contact your e-mail partner sent you to your contact list.

4. Edit the business address of the Raymond Martinez contact to read **Hardwick Ct.**

5. Remove the field Business Home Page from the fields you display on your address cards. In the Show Fields dialog box, in *the Show these fields in this order:* list box, move Business Fax down three places.

6. Change your contact list Current View to Address Cards.

Section 4

Scheduling with Calendar

- Navigating in Calendar
- Making and Moving Appointments
- Managing Appointments

Section Skills and Their Importance

In the following section you will learn to:

- **Navigate in Calendar**
  To use your appointment book effectively, you can view a day, a week, or a month at a time. You can move from date to date, check advance appointments, and look up past events.

- **Make and move appointments**
  You can use the Calendar to record and track appointments. Using Outlook's Calendar features, you can create appointments, change them, and move them.

- **Manage appointments**
  You can designate regular appointments as recurring, set reminders, create tentative appointments, and cancel and delete appointments. When an event, such as a conference, occurs that lasts a full day or several days, you can mark it on the Calendar apart from your appointments, then schedule as usual.

Navigating in Calendar

In the Calendar folder, you can schedule *appointments* and review your *tasks.* An appointment is a scheduled activity that does not involve anyone else. A task is an activity you must perform and track to completion.

To manage your time effectively, you must be able to move easily from one date to another within your Outlook Calendar and to display each date in the desired view. The Calendar toolbar offers quick access to various Calendar views. The *Date Navigator,* which looks like a monthly calendar, helps you speedily move from one week or month to another. You can even show two time zones, which helps you when traveling or when working with someone at an office in another time zone. The *TaskPad* holds your to do list. Figure 4-1 shows the Calendar screen elements.

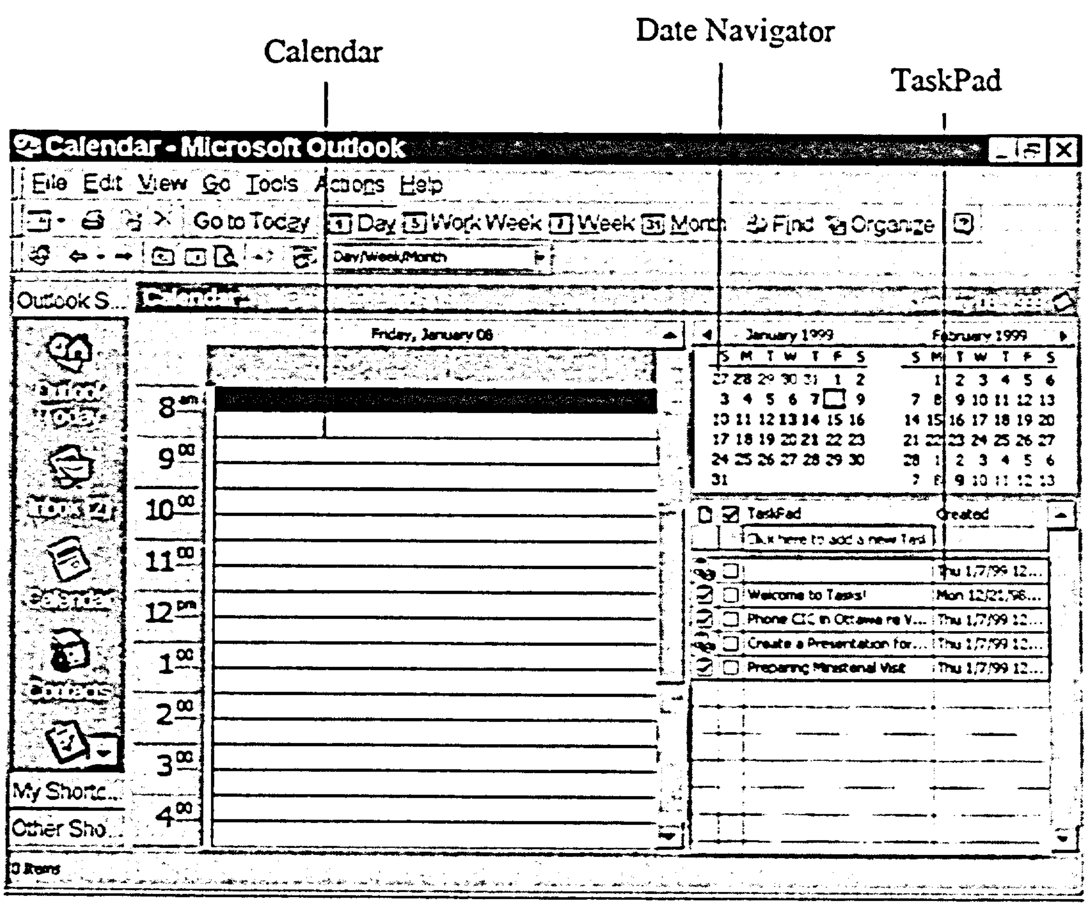


Figure 4-1: *The Calendar Screen Elements*

Viewing a Day, a Work Week, a Week, or a Month

In the Calendar, you can display your appointments by Day, Work Week, Week, or Month view. You can also choose to filter the Current View using the Advanced toolbar. Table 4-1 summarizes the built-in Current view filters.

Name	Function
Day/Week/Month	Shows the Calendar as an appointment book. Displays the date(s) selected on the Date Navigator.
Day/Week/Month View With AutoPreview	Same as the Day/Week/Month view, except the first lines of the text appear in each item.
Active Appointments	Lists all active appointments. You can sort appointments by Subject, Start Date, End Date, and so forth.
Events	Lists all active holidays and events.
Annual Events	Lists active annual events only.
Recurring Appointments	Lists recurring appointments only.
By Category	Groups active appointments by category.

Table 4-1: *The Calendar Current View Filters*

On the standard toolbar, the context-sensitive Calendar buttons provide you with a quick means to change views and to return to today's date. Some of these toolbar buttons are visible only when you maximize Outlook. Table 4-2 summarizes the Calendar standard toolbar buttons and their functions.

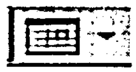
Button	Name	Function
Standard Toolbar buttons		
	New Appointment	Opens the New Appointment window so that you can create an appointment. The drop-down arrow gives you access to the New windows for the other Outlook features.
Go to Today	Go to Today	Displays today's date in Day, Week, or Month view.
1 Day	Day	Displays one day on the Calendar.
5 Work Week	Work Week	Displays one work week on the Calendar.
7 Week	Week	Displays one week on the Calendar.
31 Month	Month	Displays one month on the Calendar.
Advanced Toolbar buttons		
	Plan a Meeting	Invites attendees to a meeting, and displays invitees' schedules
Day/Week/Month	Current View	Filters your appointments by Active Appointments, Events, Recurring Appointments, and so forth. The drop-down arrow lets you select a filter.

Table 4-2: *The Calendar Toolbar Buttons*

METHOD

To view a day, a work week, a week, or a month:

1. On the toolbar, click the button for the view you want.

EXERCISE

In the following exercise, you will view a day, a work week, a week, and a month.

1.	Open the Calendar folder	*The Calendar for today, the Date Navigator, and the TaskPad appear in Day/Week/Month view.*
2.	On the Standard toolbar, click the Work Week button	*The Calendar changes to Work Week view.*
3.	On the Standard toolbar, click the Week button	*The Calendar changes to Week view.*
4.	On the Standard toolbar, click the Month button	*The Calendar changes to Month view. The Date Navigator and the TaskPad are hidden.*
5.	On the scroll bar, click the top scroll arrow once	*The Month view starts and ends one week earlier.*
6.	On the scroll bar, drag the scroll box up about ¼ inch slowly	*As you drag, a box that gives you the starting date for the five-week period that would appear when you release the pointer appears, with the date changing as you continue to drag.*
7.	On the Standard toolbar, click the Go to Today button	*The Calendar continues to appear in its current view, but it changes the time period displayed to include the current day.*
8.	On the Standard toolbar, click the Day button	*The Calendar changes to Day view, showing today's date. The Date Navigator and the TaskPad reappear.*

END

Using the Date Navigator

The Date Navigator, shown in Figure 4-2, is not only a monthly calendar but gives you quick access to any date you want. You might have one or two months displayed in your Date Navigator, depending on your screen resolution. By adjusting the pane size, you can expand the Date Navigator to display more months. You adjust the pane size using the double-headed arrow mouse pointer, shown in Figure 4-3.

When the Calendar opens, the Date Navigator highlights today's date (January 2, 1997, as shown). It always displays today's date with a box around it so you can find it easily. And it displays dates on which you have scheduled appointments in bold.

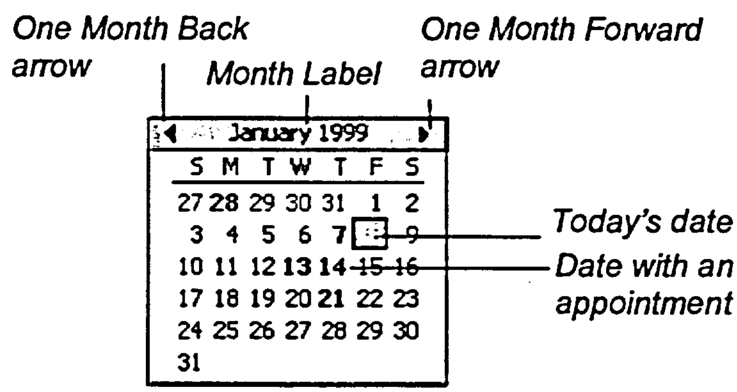


Figure 4-2: *The Date Navigator*

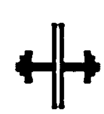


Figure 4-3: *The Double-Headed Arrow Mouse Pointer*

METHOD

To view appointments for a day during the current month:

1. On the Date Navigator, click the desired date.

To adjust pane size to show a different number of months in the Date Navigator:

1. Position the mouse pointer over the border between the panes you want to adjust.
2. When the mouse pointer becomes the double-headed arrow mouse pointer, drag the border to the desired position.

To view appointments in another month:

1. Click the One Month Back arrow once for each previous month or the One Month Forward arrow once for each future month.
   or
1. Click and hold the month label, and then, on the pop-up month list, drag the mouse pointer to the desired month.
2. Click the desired date.

EXERCISE

In the following exercise, you will use the Date Navigator to view dates in your Calendar.

1.	On the Date Navigator, click tomorrow's date	*The Calendar for tomorrow appears.*
2.	On the Date Navigator, click the One Month Forward arrow	*Next month's Date Navigator appears. The Calendar for the date you selected appears.*
3.	On the Date Navigator, click the 25th of the displayed month	*The Calendar for the 25th of the displayed month appears.*
4.	On the Date Navigator, click the One Month Forward arrow two times	*The Date Navigator for three months from now appears. The Calendar for the 25th of the month three months from today appears.*
5.	Click and hold the month label	*The pop-up month list appears.*
6.	Drag the mouse pointer to the current month	*This month's Date Navigator appears. The Calendar for the 25th of this month appears.*

7.	On the Standard toolbar, click the Go to Today button	*The Calendar for today appears.*
8.	Position the mouse pointer over the border that separates the Calendar from the Date Navigator	*The mouse pointer becomes the double-headed arrow mouse pointer.*
9.	Drag the border to the left	*The border does not appear to move; however, a vertical line that indicates that you can view one more month in the Date Navigator appears while you are dragging. Once you release the mouse button, a calendar for an additional month appears in the Date Navigator.*
10.	On the Date Navigator, click any date next month	*The Calendar for the date you selected appears.*
11.	Position the mouse pointer over the border that separates the Date Navigator from the TaskPad	*The mouse pointer becomes the double-headed arrow mouse pointer.*
12.	Drag the border down	*The border does not appear to move; however, a horizontal line that indicates that you can view additional months appears while you are dragging. Once you release the mouse button, more calendars appear in the Date Navigator.*
13.	Drag the vertical border back to the right	*One column of calendars disappears in the Date Navigator.*
14.	Drag the horizontal border that separates the Date Navigator from the TaskPad up	*The Date Navigator is restored to its default appearance.*
15.	Click the Go to Today toolbar button	*The Calendar for today appears.*

END

Viewing a Range of Dates, Several Weeks, and Discontiguous Days

You can also use the Date Navigator to view selected days, such as a five-day work week, the next three Tuesdays, three weeks, or whatever days you like. If the days are contiguous, you can drag across them to display them. If they are discontiguous, you select the days by holding **CTRL** and clicking the desired dates, just as you would select multiple files in Microsoft Explorer.

METHOD

To view a range of dates:

1. On the Date Navigator, drag across the dates.

To view several weeks:

1. Position the mouse pointer near the left edge of the Date Navigator.
2. When the pointer changes from pointing left to pointing right, drag the pointer along the left edge of the Date Navigator for the desired weeks.

To view discontiguous days:

1. Press and hold **CTRL**
2. On the Date Navigator, click each date you want to view.
3. Release **CTRL**

EXERCISE

In the following exercise, you will view a range of dates, three weeks, and discontiguous days.

1.	On the Date Navigator, drag from today's date through the next two days	*Today, tomorrow, and the next day appear on your Calendar.*
2.	Position the mouse pointer near the left edge of the Date Navigator	*The pointer changes to an arrow pointing right.*

3.	Drag the pointer along the left edge of the Date Navigator for the second and third full weeks of this month	*The second and third full weeks of this month appear on your Calendar.*
4.	On the Date Navigator, click today's date	*Today's date is selected and appears on your Calendar.*
5.	Press and hold **CTRL**	
6.	On the Date Navigator, click the date one week from today	*Today's date and the date one week from today appear on your Calendar.*
7.	Release **CTRL**	
8.	On the Date Navigator, click today's date	*Only today's date appears on your Calendar.*

END

Showing Two Time Zones

When you work regularly with an office in another time zone, you might find it helpful to display that office's time zone as well as your own when displaying the Calendar. This can help you plan phone calls for the right time of day. You set the time zone display in the Time Zone dialog box, shown in Figure 4-4.

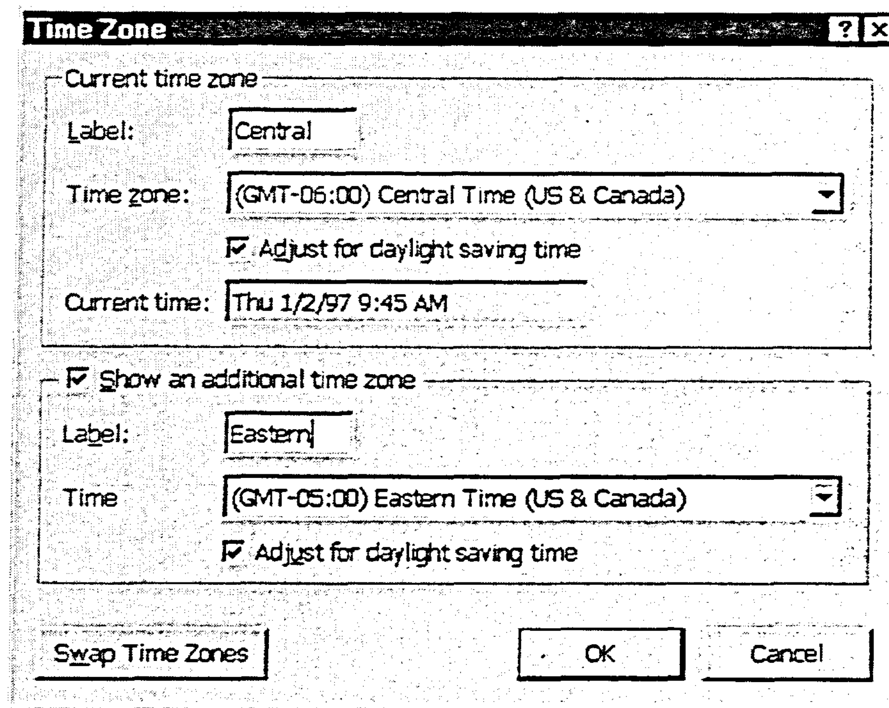


Figure 4-4: *The Time Zone Dialog Box*

METHOD

To show two time zones:

1. In the Calendar, from the Tools menu, choose Options.
2. In the Options dialog box, on the Preferences page, choose Calendar Options...
3. In the Calendar Options dialog box, choose Time Zone.
4. In the Time Zone dialog box, in the Current time zone area, in the Label text box, type a short name for the current time zone.
5. Select the *Show an additional time zone* check box.
6. In the additional time zone area, in the Label text box, type a short name for the second time zone.
7. In the Time drop-down list, select a time zone.

8. If that time zone uses daylight savings time during the spring and summer, select the *Adjust for daylight saving time* check box.
9. Choose OK.
10. In the Calendar Options dialog box, choose OK.
11. In the Options dialog box, choose OK.

Note: To change your current time zone to the second time zone, in the Time Zone dialog box, choose Swap Time Zones. This, however, affects all times displayed in all your Windows-based programs, not just the time displayed in Outlook.

EXERCISE

In the following exercise, you will show two time zones.

1.	From the Tools menu, choose Options	*The Options dialog box appears.*
2.	In the Options dialog box, choose the Preferences tab and choose the Calendar Options button	
3.	In the Calendar Options dialog box, choose Time Zone	*The Time Zone dialog box appears.*
4.	In the Current time zone area, in the Label text box, type a short name for your time zone	
5.	Select the *Show an additional time zone* check box	*The additional time zone area appears.*
6.	If necessary, select the text in the Label text box, and then type a short name for the time zone directly to the east of your current time zone	
7.	In the Time drop-down list, select the time zone directly to the east of your current time zone (the next earlier time in the drop-down list)	

8.	If necessary, select the *Adjust for daylight saving time* check box	
9.	Choose OK	*The Options dialog box reappears.*
10.	Choose OK	*The Calendar displays your time zone adjacent to the Calendar and the second time zone to the left of your time zone.*

END

Making and Moving Appointments

Outlook gives you the flexibility you need to manage your appointments. You usually make appointments in the Day view of the Calendar, although you can also set an appointment in the Work Week, Week and the Month views. You can edit and move appointments as required in all views. Working in the information viewer, you can edit an appointment by inserting and deleting text, just as you do in a Mail message.

Sometimes you must move an appointment to another day. You can easily modify the date of an appointment in the Day, Work Week and Week views. To move an appointment within the same calendar week, you can drag and drop it within Day, Work Week and Week views. To move an appointment farther away in time, you can drag it to the Date Navigator.

Creating Appointments

The most basic method of making an appointment is simple—click a time slot or drag a time period in your Calendar to select it, and then type a description of the appointment. As you type the text of an appointment, the text appears on the screen. If the displayed time slot is not wide enough, the text wraps automatically to the next line when it gets to the right edge of the appointment area.

When you finish describing an appointment, Outlook saves the entry as soon as you click somewhere outside the appointment time slot. Even if you choose to exit the program, you do not need to click a Save button or choose Save from a menu to save your appointment.

You can make a more detailed appointment using the New Appointment window, shown in Figure 4-5. In this window, you can enter additional comments about the appointment, such as the materials you should bring with you to the appointment, directions to the location, and so forth.

By default, Outlook sends you a reminder about your appointments before each appointment. If you want to cancel the reminder or change the interval before the appointment for the reminder to appear, you can do so in the New Appointment window. A bell icon appears in the time slot to indicate that you set a reminder for the appointment.

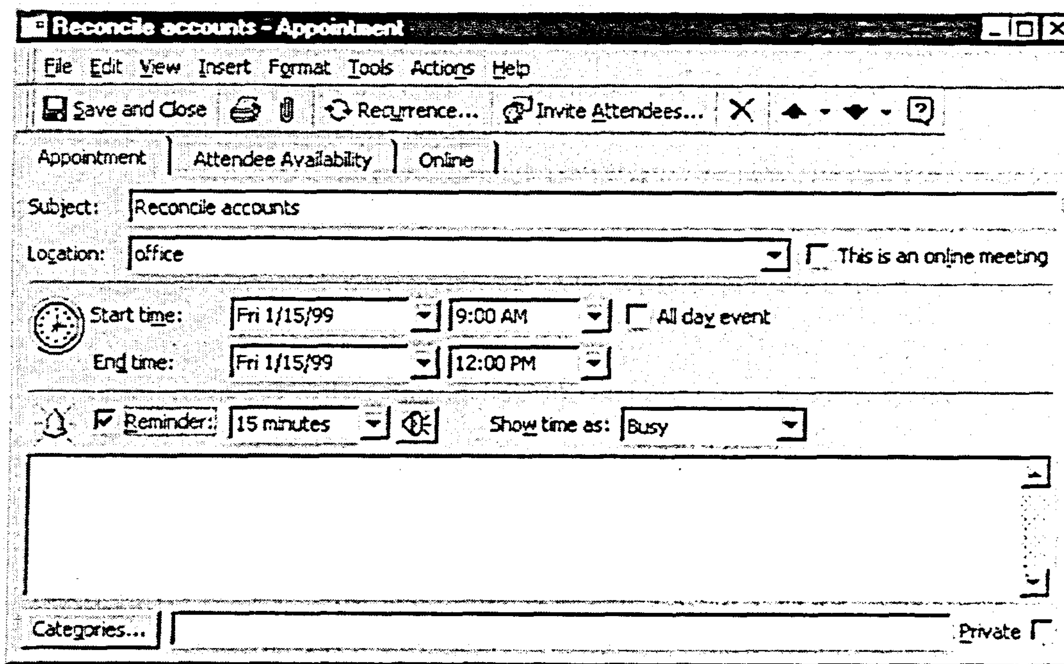


Figure 4-5: *The New Appointment Window*

You access the New Appointment window by clicking the New Appointment button located on the Calendar toolbar.

METHOD

To select a time slot or time period:

1. In the Calendar (Day, Work Week, Week, or Month view), display the desired date.
2. Click the time slot.
   or
2. Drag through as many time slots as necessary.

To create a basic appointment:

1. Select a time slot or time period.
2. Type a description.

To create a detailed appointment:

1. If desired, select a time slot or time period.
2. Double-click the selected time slot or time period.
   or
2. On the Standard toolbar, click the New Appointment button.

3. In the New Appointment window, type a subject for the appointment.
4. In the Location combo box, type the location or select it from the drop-down list.
5. If necessary, modify the Start time and End time displayed.
6. If desired, in the large text box at the bottom of the page, type comments about the appointment.
7. On the toolbar, click the Save and Close button.

Note: Instead of selecting an appointment date on the Date Navigator or typing numbers for the date or time, you can use Microsoft's *AutoDate* feature. Simply type a description of the date—for example, next Tuesday, two months from today, from tomorrow until the end of the month—or time—an hour ago, noon, five o'clock pm—in the Start time and End time combo boxes. You can also type the names of holidays that fall on the same date every year—Valentine's Day, Veterans Day, Halloween. Outlook translates your descriptions into dates.

EXERCISE

In the following exercise, you will create appointments.

1.	At your instructor's direction, click a thirty-minute time slot approximately one hour from the current time	*The time slot is selected.*
2.	Type **Call to check for new deliveries**	*A **Call to check for new deliveries** appointment appears in your selected time slot.*
3.	Position the mouse pointer over the 2:00 P.M. time slot	
4.	Drag through the 3:00 P.M. time slot	*A 1½-hour time period is selected. The previous appointment is saved.*
5.	Type **Design new floor plan**	*A **Design new floor plan** appointment appears in your selected time slot.*

6.	On the Standard toolbar, click the New Appointment button	*The New Appointment window appears. The previous appointment is saved.*
7.	On the Appointment page, in the Subject text box, type **Reconcile accounts**	
8.	In the Location combo box, type **office**	
9.	In the left Start time combo box, select the date and then type **first Monday of next month**	
10.	In the right Start time combo box, select the time and type **nine a.m.**	*The entry in the left Start time combo box changes to show the actual date when you clicked or tabbed to the next data entry field.*
11.	In the right End time combo box, select the time and type **noon**	*The entry in the right Start time combo box changes to show the time in numerals when you clicked or tabbed to the next data entry field.*
12.	In the Reminder area, make sure the Reminder check box is selected	
13.	In the Reminder drop-down list box, make sure 15 minutes is selected	
14.	In the large text box at the bottom of the window, type **Get someone to cover phones.**	*The entry in the right End time combo box changes to show the time in numerals when you clicked or tabbed to the next data entry field.*

15.	On the toolbar, click the Save and Close button	*The Calendar for today reappears.*
16.	Display the Calendar for the first Monday of next month	*The Calendar appears displaying the new appointment on the first Monday of next month.*

END

Selecting an Appointment and Modifying the Date in Day View

When you modify appointment details, you need to select the appointment before you can edit it. Figure 4-6 shows the Calendar with an appointment selected.

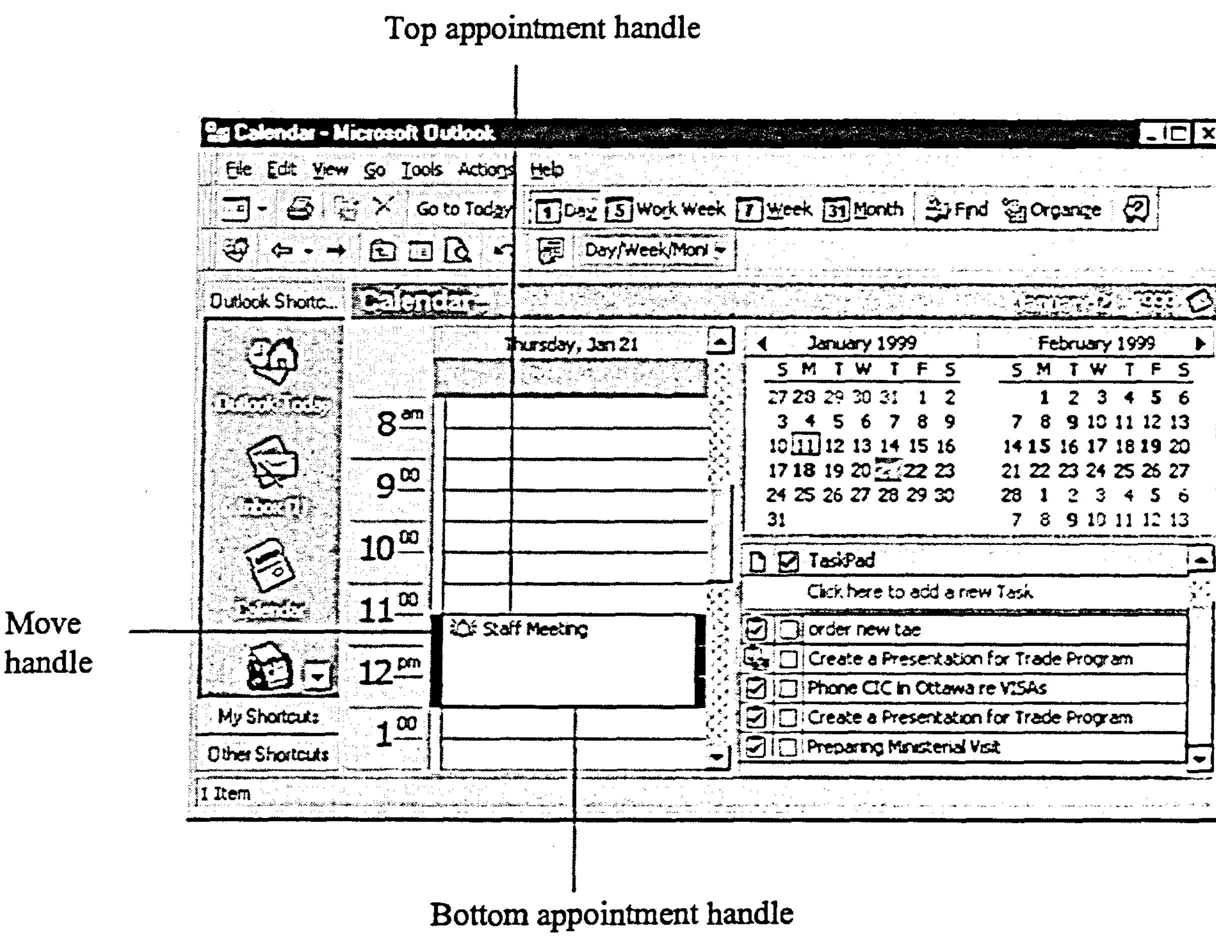


Figure 4-6: *The Calendar with an Appointment Selected*

When you must move an appointment to a different week, the simplest way is to use the Date Navigator in Day view. You position the mouse pointer over the *move handle,* which is the blue line to the left of the appointment. The pointer becomes a four-headed arrow, shown in Figure 4-7, which you use to drag the appointment to the Date Navigator. You select the appointment when you begin to drag it. If you want to reschedule the appointment for the following month, you can adjust the Date Navigator's width to show two months.

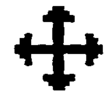


Figure 4-7: *The Mouse Pointer When Positioned over the Move Handle*

METHOD

To select an appointment:

1. Click the appointment.

To change the date of an appointment in Day view:

1. Position the mouse pointer over the move handle.
2. When the pointer becomes a four-headed arrow, click and drag the appointment to the desired date on the Date Navigator.
   or
2. When the pointer becomes a four-headed arrow, click the move handle.
3. From the Edit menu, choose Cut.
4. On the Date Navigator, click the new date or time.
   or
4. Display the desired day.
5. From the Edit menu, choose Paste.

EXERCISE

In the following exercise, you will move the date of an appointment from one week to another and from one month to another in Day view.

1.	Display today's appointments in Day view	
2.	Adjust the Date Navigator to show two months	
3.	Position the mouse pointer over the move handle of the *Design new floor plan* appointment	*The mouse pointer becomes a four-headed arrow.*
4.	Drag the appointment to Friday of next week on the Date Navigator	*The appointment now takes place on Friday of next week and Friday of next week appears in the Calendar.*

5.	Position the mouse pointer over the move handle	*The mouse pointer becomes a four-headed arrow.*
6.	Drag the appointment to the first Wednesday of next month on the Date Navigator	*The appointment now takes place on the first Wednesday of next month and the first Wednesday of next month appears in the Calendar.*
7.	Position the mouse pointer over the move handle	*The mouse pointer becomes a four-headed arrow.*
8.	Click the move handle	
9.	From the Edit menu, choose Cut	*The appointment is placed on the Clipboard.*
10.	On the Standard toolbar, click the Go to Today button	*Today's date appears in the Calendar.*
11.	From the Edit menu, choose Paste	*The appointment is scheduled for today at its original time.*
12.	Adjust the Date Navigator to show just one month	

END

Modifying the Date in Week View

You can also move an appointment in Week view. You can drag it to a new date displayed on the calendar or on the Date Navigator. Figure 4-8 shows the Calendar in Week view.

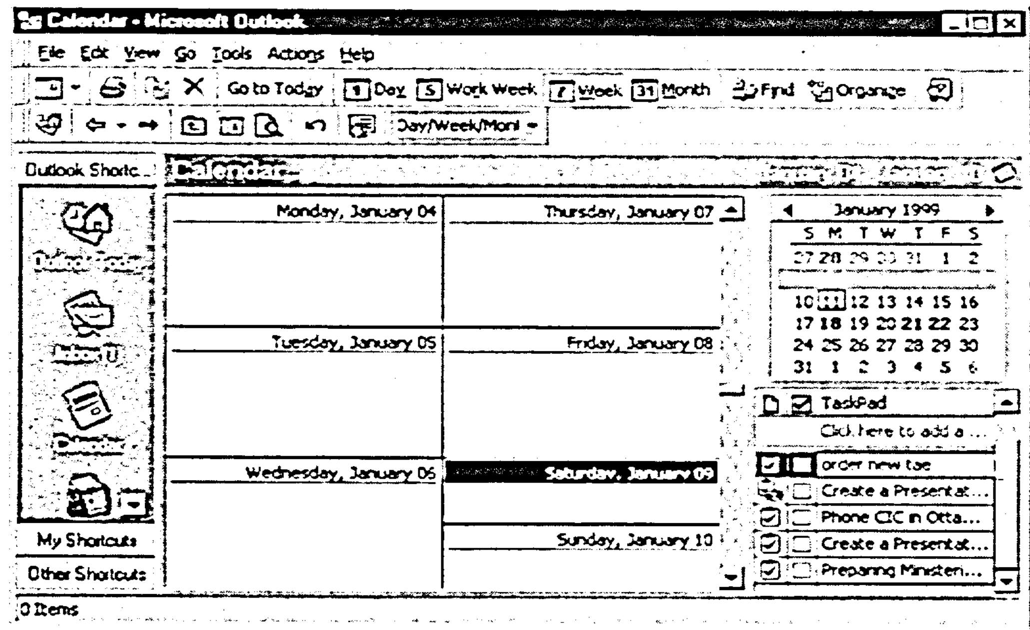


Figure 4-8: *The Calendar in Week View*

METHOD

To modify the date of an appointment in Week view:

1. Position the mouse pointer over the time area of the appointment.
2. When the pointer becomes a four-headed arrow, drag the appointment to the new date on the Calendar or on the Date Navigator.

EXERCISE

In the following exercise, you will modify the date of your appointment in Week view.

1.	On the Standard toolbar, click the Week button	*The Week view appears.*
2.	Position the mouse pointer over the time area of the *Design new floor plan* appointment	*The mouse pointer becomes a four-headed arrow.*
3.	Drag the appointment to Friday on the Calendar	*The appointment now takes place on Friday from 2:00 P.M. to 3:30 P.M.*
4.	Position the mouse pointer over the time area of the appointment	*The mouse pointer becomes a four-headed arrow.*
5.	Drag the appointment to Wednesday on the Date Navigator	*The appointment now takes place on Wednesday.*
6.	If today is not Wednesday, position the mouse pointer over the time area of the appointment	*The mouse pointer becomes a four-headed arrow.*
7.	Drag the appointment to today's date on the Calendar	*The appointment now takes place today.*
8.	On the toolbar, click the Day button	*Today's Calendar appears in Day view.*

END

Changing the Time of an Appointment

Outlook lets you easily modify the beginning and ending times of an appointment. If you must move an appointment to another time slot in the same day, you can drag it there with the move handle. You can change just the startup time of an appointment by dragging the top *appointment handle* with the double-headed arrow or change just the ending time of an appointment by dragging the bottom appointment handle with the double-headed arrow. The appointment handles are the blue borders at the top and the bottom of a selected appointment that allow you to change the appointment beginning and ending times.

METHOD

To move an appointment to another time slot on the same day:

1. Position the mouse pointer over the move handle.
2. When the pointer becomes a four-headed arrow, drag the appointment to the new time slot.

To change the startup time or the ending time of an appointment:

1. Position the mouse pointer over an appointment handle.
2. When the pointer becomes a double-headed arrow, drag the appointment handle to the new time.

EXERCISE

In the following exercise, you will change the time of your appointment.

1.	Position the mouse pointer over the move handle of the *Design new floor plan* appointment	*The mouse pointer becomes a four-headed arrow.*
2.	Drag the appointment one hour later	
3.	Select the appointment again	
4.	Position the mouse pointer over the top appointment handle	*The mouse pointer becomes a double-headed arrow.*
5.	Drag the top handle to 1:30 P.M.	*The appointment now begins at 1:30 P.M.*

6. Position the mouse pointer over the bottom appointment handle	*The mouse pointer becomes a double-headed arrow.*
7. Drag the bottom handle to 3:00 P.M.	*The appointment now ends at 3:00 P.M.*

END

Managing Appointments

Outlook provides a variety of more complex time-management capabilities, including creating *recurring appointments* and *tentative appointments*. Recurring appointments are those appointments in your schedule that occur regularly, such as a biweekly review of orders or preparing a monthly report. Tentative appointments are those appointments for which you need to reserve a time slot even though they might not take place.

You can also mark *events,* days on which you observe or celebrate something while conducting business as usual. For example, you would mark your birthday as an event. You can also mark a conference as an event, and then schedule the individual sessions you plan to attend as appointments.

In addition, should you need to cancel an appointment, Outlook lets you delete it so you can schedule another appointment in your newly freed time period.

Creating Recurring Appointments

When you schedule a recurring appointment, Outlook automatically places all future occurrences of the appointment in your Calendar for the period you specify. The Appointment Recurrence dialog box, illustrated in Figure 4-9, lets you define recurring appointments.

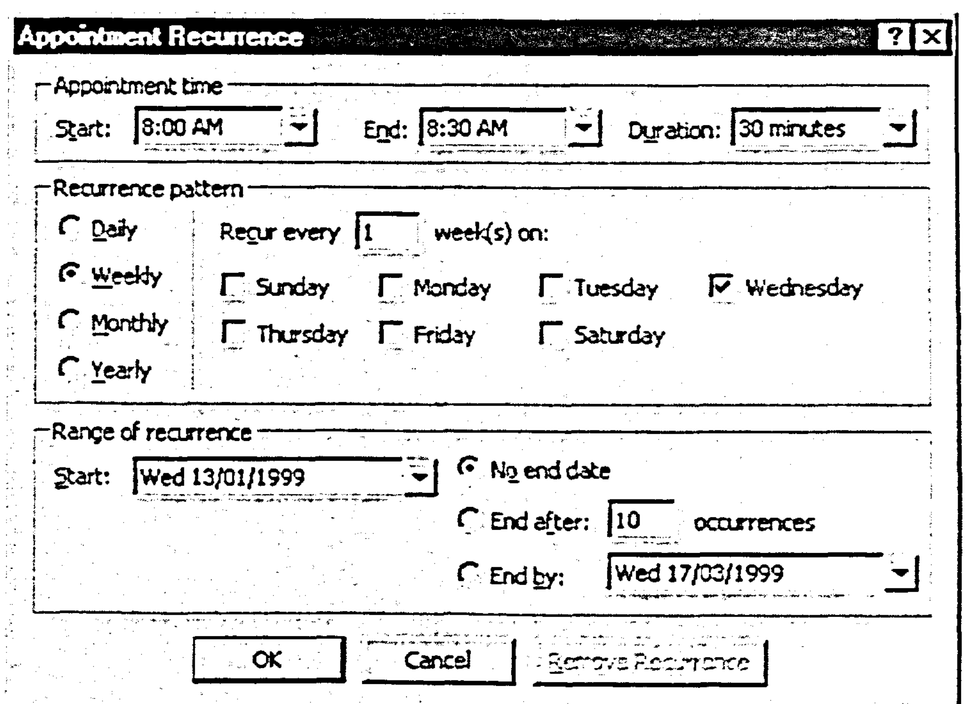


Figure 4-9: *The Appointment Recurrence Dialog Box*

When you have scheduled a recurring appointment, your Calendar shows the Recurrence icon, a circle made from two arrows, which appears at the left of the appointment, as shown in Figure 4-10.

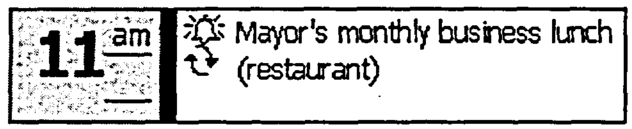


Figure 4-10: *A Recurring Appointment Displaying The Recurrence Icon*

METHOD

To create a recurring appointment:

1. Select a time slot or time period.
2. From the Actions menu, choose New Recurring Appointment.
3. In the Appointment Recurrence dialog box, in the Recurrence pattern area, in the left column, select a time period option button.
4. In the Recurrence pattern area, in the right column, select the appropriate option button or check boxes and, if necessary, fill in the required information.
5. In the Range of recurrence area, select the appropriate end date option button and fill in required information.
6. Choose OK.
7. Complete the New Appointment window, and then, on the toolbar, click the Save and Close button.

EXERCISE

In the following exercise, you will create a recurring appointment.

1.	On the Calendar, select 11:00 A.M. to 2:00 P.M. on the third Monday of next month	
2.	From the Actions menu, choose New Recurring Appointment	*The Appointment Recurrence dialog box appears over the New Appointment window.*

3. In the Recurrence pattem area, in the left column, select the Monthly option button

4. In the Recurrence pattem area, in the right column, select the second option button

5. In the Range of recurrence area, make sure the No end date option button is selected

6. Choose OK — *The New Appointment window appears.*

7. In the Subject text box, type **Mayor's monthly business lunch**

8. In the Location text box, type **restaurant**

9. In the large text box at the bottom of the window, type **The mayor always orders stuffed grape leaves.**

10. On the toolbar, click the Save and Close button — *The appointment appears on the Calendar displaying the subject and the location. The appointment displays the Recurrence icon.*

END

Editing Recurring Appointments

You can edit recurring appointments by reopening the Appointment Recurrence dialog box. Before this dialog box appears, however, the Open Recurring Item message box, shown in Figure 4-11, appears. In this message box, you specify whether the change is for this occurrence only or for the entire series.

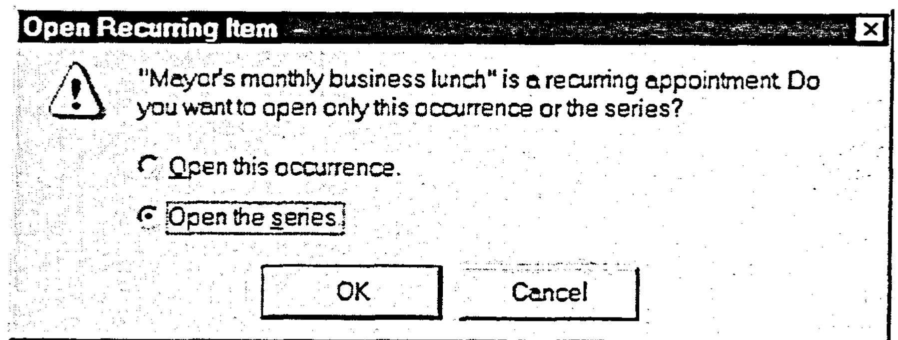


Figure 4-11: *The Open Recurring Item Message Box*

METHOD

To edit a recurring appointment:

1. Double-click the appointment.

   or

1. Select the appointment, and then, from the File menu, choose Open/Selected Items.
2. In the Open Recurring Item message box, select the desired option button, and then choose OK.
3. In the Recurring Appointment window, make the changes.
4. If desired, from the Appointment menu, choose Recurrence.
5. In the Appointment Recurrence dialog box, make the changes.
6. Choose OK.
7. In the Recurring Appointment window, on the toolbar, click the Save and Close button.

EXERCISE

In the following exercise, you will edit a recurring appointment.

1. If necessary, select the *Mayor's business lunch* appointment
2. From the File menu, choose Open/Selected Items — *The Open Recurring Item message box appears.*
3. Select the Open the series option button
4. Choose OK — *The Recurring Appointment window appears.*
5. In the Subject text box, select the word *monthly* and type **biweekly**
6. From the Appointment menu, choose Recurrence — *The Appointment Recurrence dialog box appears.*
7. In the Recurrence pattern area, in the left column, select the Weekly option button
8. In the Recurrence pattern area, in the right column, select the number in the *Recur every...weeks* text box, and then type **2**
9. Choose OK — *The Recurring Appointment window shows the appointment recurring every two weeks beginning with the selected date.*
10. On the toolbar, click the Save and Close button — *The edited appointment appears on the Calendar.*

END

Creating Tentative Appointments

Sometimes you might want to reserve a time slot even if you are not sure an appointment is definite. For example, if you want to attend a training class but your supervisor has not approved the expense yet, you can mark the time slot as a tentative appointment. Tentative appointments display a light blue move handle to the left of the appointment.

METHOD

To create a tentative appointment:

1. Create an appointment but do not close the New Appointment window.
2. From the Show time as drop-down list, select Tentative.
3. On the toolbar, click the Save and Close button.

EXERCISE

In the following exercise, you will create a tentative appointment.

1.	On the Date Navigator, select next Tuesday	*The Calendar displays next Tuesday.*
2.	On the Calendar, select the time period from 9:00 A.M. to 1:30 P.M.	
3.	On the toolbar, click the New Appointment button	*The New Appointment window appears.*
4.	In the Subject text box, type **Excel 97 training class**	
5.	From the Show time as drop-down list, select Tentative	
6.	On the toolbar, click the Save and Close button	*The appointment appears on the Calendar. The move handle is light blue.*

END

Inserting Events

You can remember special business and personal days by inserting them using the New Event window, shown in Figure 4-12. Outlook displays events at the head of your Calendar, as illustrated in Figure 4-13. Here is a simple place to list pay days, birthdays, anniversaries, and other significant events that do not require appointments during your work day. If the event lasts several days, Outlook displays it every day for its duration.

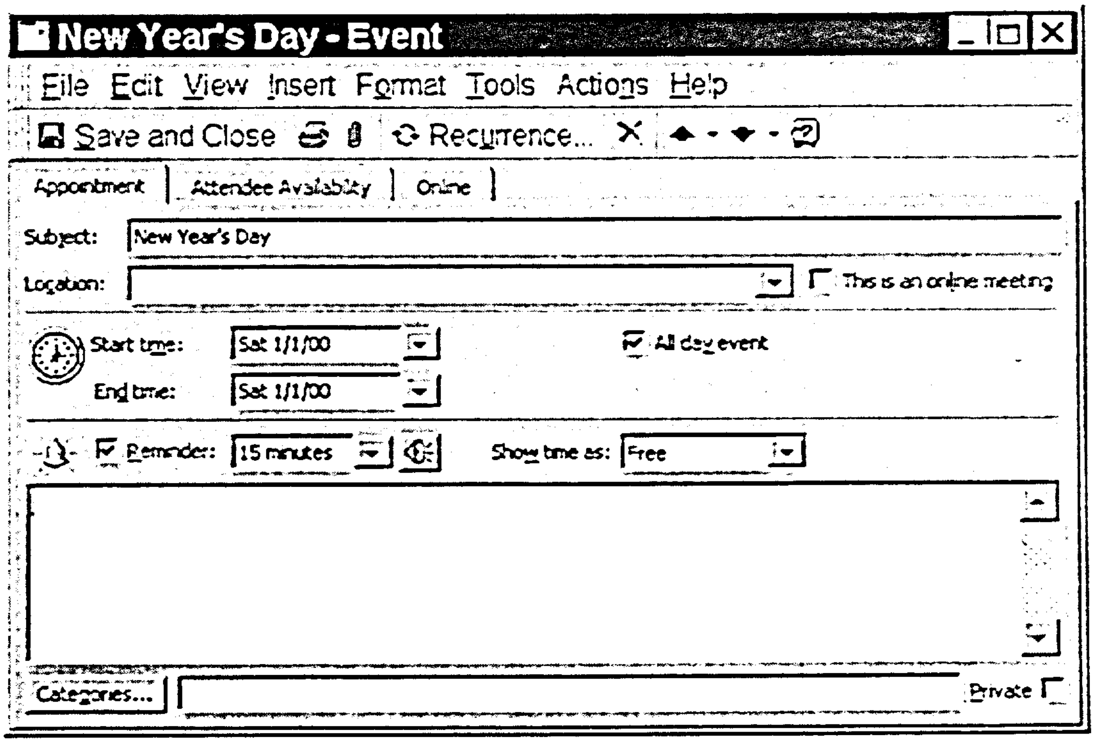


Figure 4-12: *The New Event Window*

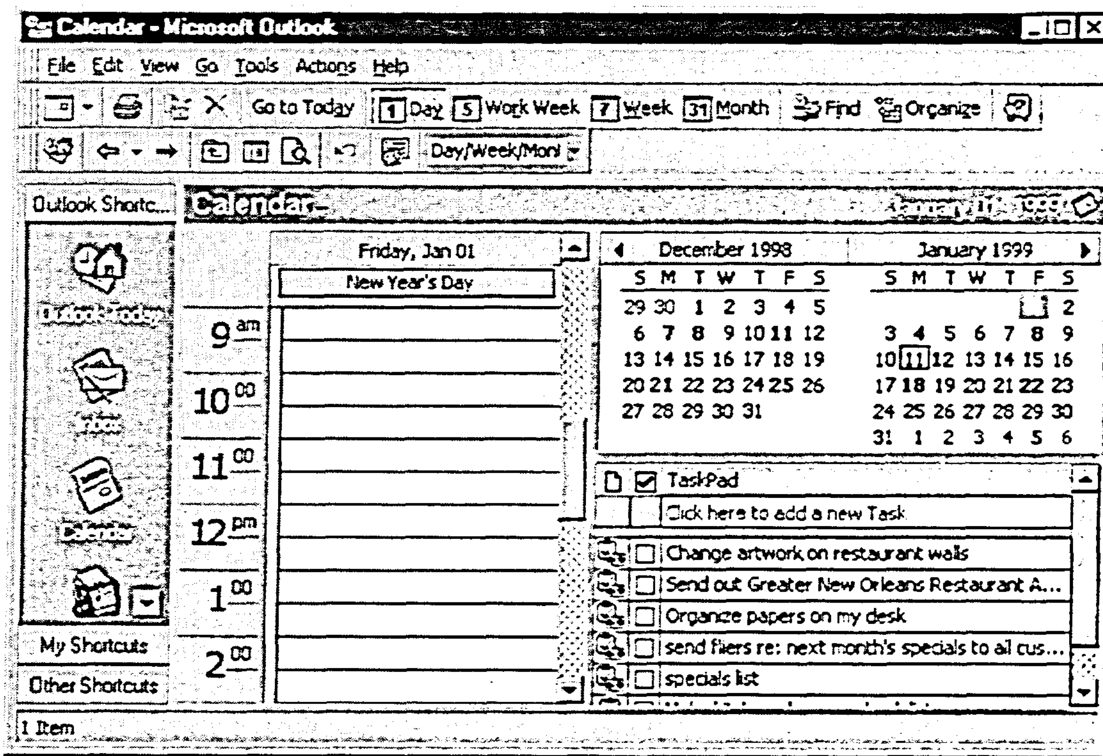


Figure 4-13: *The Calendar with an Event Displayed*

METHOD

To insert events:

1. From the Actions menu, choose New All Day Event.
2. In the New Event window, complete the text boxes, select the options buttons and check boxes, and so forth, as if you were creating a new appointment.
3. Make sure the All day event check box is selected.
4. Make sure Free is selected in the Show time as: drop-down list box.
5. On the toolbar, click the Save and Close button.

EXERCISE

In the following exercise, you will insert an event.

1.	From the Actions menu, choose New All Day Event	*The New Event window appears.*
2.	In the Subject text box, type **New Year's Day**	
3.	From the Start time drop-down calendar, type January 1, 2000	
4.	Make sure the All day event check box is selected	
5.	Make sure Free is selected in the Show time as: drop-down list box	
6.	On the toolbar, click the Save and Close button	*The Calendar reappears.*
7.	Go to the date you selected for New Year's Day	*The event appears above the Calendar on the selected date.*

END

Deleting Appointments

You should delete appointments as soon as you cancel them. Prompt deletions keep your Calendar up-to-date and give you and your colleagues an accurate picture for setting meetings. You can use the toolbar button to delete appointments.

METHOD

To delete an appointment:

1. Select the appointment.
2. From the Edit menu, choose Delete.
   or
2. On the toolbar, click the Delete button.

EXERCISE

In the following exercise, you will delete an appointment.

1. Display today's date
2. In the Calendar, select the *Call to check for new deliveries* appointment
3. On the Standard toolbar, click the Delete button — *The appointment is deleted.*

END

Restoring Deleted Appointments

If you delete an appointment in error and realize your mistake immediately after the deletion, you can restore it quickly. If you take any other action before restoring the appointment, however, you must recreate the deleted appointment from scratch.

METHOD

To restore a deleted appointment immediately after deleting it:

1. From the Edit menu, choose Undo Delete.

   or

1. On the Advanced toolbar, click the Undo Delete button.

EXERCISE

In the following exercise, you will restore a deleted appointment.

1. On the Advanced toolbar, click the Undo Delete button	*The **Call to check for new deliveries** appointment is restored.*

END

Section 4 Summary

To view a day, a work week, a week, or a month:

1. On the Standard toolbar, click the button for the view you want.

To view appointments for a day during the current month:

1. On the Date Navigator, click the desired date.

To adjust pane size to show a different number of months in the Date Navigator:

1. Position the mouse pointer over the border between the panes you want to adjust.
2. When the mouse pointer becomes the double-headed arrow mouse pointer, drag the border to the desired position.

To view appointments in another month:

1. Click the One Month Back arrow once for each previous month or the One Month Forward arrow once for each future month.
   or
1. Click and hold the month label, and then, on the pop-up month list, drag the mouse pointer to the desired month.
2. Click the desired date.

To view a range of dates:

1. On the Date Navigator, drag across the dates.

To view several weeks:

1. Position the mouse pointer near the left edge of the Date Navigator.
2. When the pointer changes from pointing left to pointing right, drag the pointer along the left edge of the Date Navigator for the desired weeks.

To view discontiguous days:

1. Press and hold CTRL
2. On the Date Navigator, click each date you want to view.
3. Release CTRL

To show two time zones:

1. In the Calendar, from the Tools menu, choose Options.
2. In the Options dialog box, on the Preferences page, choose Calendar Options.
3. In the Calendar Options dialog box choose Time Zone.
4. In the Time Zone dialog box, in the Current time zone area, in the Label text box, type a short name for the current time zone.
5. Select the *Show an additional time zone* check box.
6. In the additional time zone area, in the Label text box, type a short name for the second time zone.
7. In the Time drop-down list, select a time zone.
8. If that time zone uses daylight savings time during the spring and summer, select the *Adjust for daylight saving time* check box.
9. Choose OK.
10. In the Calendar Options dialog box choose OK.
11. In the Options dialog box, choose OK.

To select a time slot or time period:

1. In the Calendar (Day, Work Week, Week, or Month view), display the desired date.
2. Click the time slot.
   or
2. Drag through as many time slots as necessary.

To create a basic appointment:

1. Select a time slot or time period.
2. Type a description.

To select an appointment:

1. Click the appointment.

To create a detailed appointment:

1. If desired, select a time slot or time period.
2. Double-click the selected time slot or time period.
   or
2. On the Standard toolbar, click the New Appointment button.
3. In the New Appointment window, on the Appointment page, in the Subject text box, type the subject.
4. In the Location combo box, type the location or select it from the drop-down list.
5. If necessary, modify the Start time and End time displayed.
6. If desired, in the large text box at the bottom of the page, type comments about the appointment.
7. On the toolbar, click the Save and Close button.

To change the date of an appointment in Day view:

1. Position the mouse pointer over the move handle.
2. When the pointer becomes a four-headed arrow, click and drag the appointment to the desired date on the Date Navigator.
   or
2. When the pointer becomes a four-headed arrow, click the move handle.
3. From the Edit menu, choose Cut.
4. On the Date Navigator, click the new date or time.
   or
4. Display the desired day.
5. From the Edit menu, choose Paste.

To modify the date of an appointment in Week view:

1. Position the mouse pointer over the time area of the appointment.
2. When the pointer becomes a four-headed arrow, drag the appointment to the new date on the Calendar or on the Date Navigator.

To move an appointment to another time slot on the same day:

1. Position the mouse pointer over the move handle.
2. When the pointer becomes a four-headed arrow, drag the appointment to the new time slot.

To change the startup time or the ending time of an appointment:

1. Position the mouse pointer over an appointment handle.
2. When the pointer becomes a double-headed arrow, drag the appointment handle to the new time.

To create a recurring appointment:

1. Select a time slot or time period.
2. From the Actions menu, choose New Recurring Appointment.
3. In the Appointment Recurrence dialog box, in the Recurrence pattern area, in the left column, select a time period option button.

4. In the Recurrence pattern area, in the right column, select the appropriate option button or check boxes and, if necessary, fill in the required information.
5. In the Range of recurrence area, select the appropriate end date option button and fill in required information.
6. Choose OK.
7. Complete the New Appointment window, and then, on the toolbar, click the Save and Close button.

To edit a recurring appointment:

1. Double-click the appointment.
   or
1. Select the appointment, and then, from the File menu, choose Open / Selected Items.
2. In the Open Recurring Item message box, select the desired option button, and then choose OK.
3. In the Recurring Appointment window, make the changes.
4. If desired, from the Appointment menu, choose Recurrence.
5. In the Appointment Recurrence dialog box, make the changes.
6. Choose OK.
7. In the Recurring Appointment window, on the toolbar, click the Save and Close button.

To create a tentative appointment:

1. Create an appointment but do not close the New Appointment window.
2. From the Show time as: drop-down list, select Tentative.
3. On the toolbar, click the Save and Close button.

To insert events:

1. From the Actions menu, choose New All Day Event.
2. In the New Event window, complete the text boxes, select the options buttons and check boxes, and so forth, as if you were creating a new appointment.
3. Make sure the All day event check box is selected.
4. Make sure Free is selected in the Show time as: drop down list box.
5. On the toolbar, click the Save and Close button.

To delete an appointment:

1. Select the appointment.
2. From the Edit menu, choose Delete.
   or
2. On the Standard toolbar, click the Delete button.

To restore a deleted appointment immediately after deleting it:

1. From the Edit menu, choose Undo Delete.
   or
1. On the Advanced toolbar, click the Undo Delete button.

Section 4 Self-Check Exercise

1. On the Friday before the third Monday of next month, make a one-hour appointment located in your office beginning at 9:00 A.M. to review preparations for the mayor's biweekly luncheon. Make a note that says: **Order all ingredients for stuffed grape leaves.**

2. Move the appointment to the Thursday before the third Monday, and then move it forward thirty minutes to start at 9:30 A.M.

3. Shorten the appointment to end at 10:00 A.M.

4. Display Friday of the previous week. Make a one-half hour appointment that recurs weekly at 4:30 P.M. to review your staples inventory.

5. Change the inventory appointment to biweekly.

6. On the second Tuesday of every month, create a recurring appointment from 6:00 P.M. to 9:00 P.M. to teach a culinary course at the New Orleans Culinary Institute.

7. Set a reminder for the culinary course for two hours before the course begins.

8. On the fourth Friday following the current date, create a tentative appointment from 5:30 P.M. to 6:00 P.M. for a haircut at Snippits.

9. Delete the haircut appointment and restore it immediately.

10. View your appointments for this week, and then view your appointments for the entire month. Then return to Day view.

11. Show only your time zone.

12. Insert your birthday as an event in your calendar.

13. Restore your Calendar to today's date in Day view.

Section 5

Organizing Tasks

- Working with Tasks
- Managing Tasks

Section Skills and Their Importance

In the following section you will learn to:

- **Work with tasks**
  Outlook can help you manage most professional and personal tasks. You create new tasks, edit them, make them recurring, and, if necessary, delete them. You can view them in detail in the Tasks folder or in brief on the TaskPad in the Calendar folder.

- **Manage tasks**
  With Outlook, you can set priorities for tasks, track them, and mark them completed. You can even automatically regenerate a task after you complete it. You can also group and sort your tasks by their priority, due date, or any other property by which you choose to group or sort.

Working with Tasks

Tasks are activities or duties you must perform and track through completion. Tasks can be work-related, such as completing and sending in time sheets, or personal, such as purchasing tickets to an event.

The Tasks folder, shown in Figure 5-1, lets you define your tasks. You can display all tasks in a simple list or a detailed list, show only active tasks, show tasks for the next seven days, show overdue tasks, or view your tasks by other criteria.

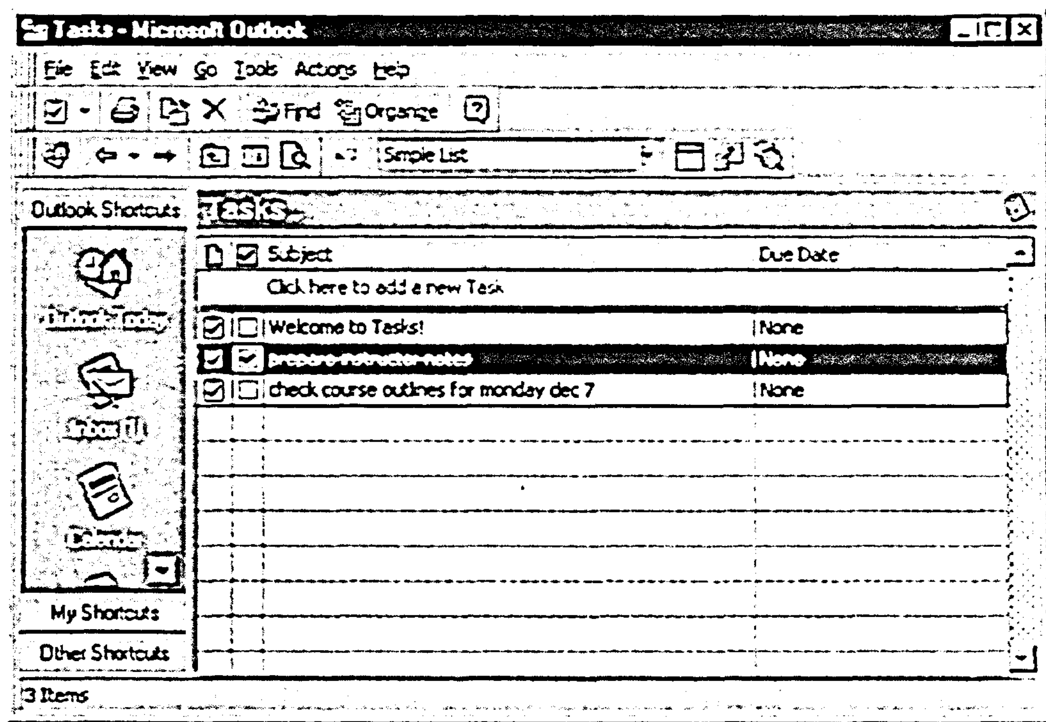


Figure 5-1: *Tasks in Simple List View*

The TaskPad in your Calendar shows active tasks that you should complete within the next seven days. You can add to the task list in the Tasks folder or on the TaskPad.

Creating a Task

You can create a simple task in your list by clicking the *Click here to add a new Task* text box on the task list in the Tasks folder or on the TaskPad in the Calendar. You then enter your information and click anywhere else on the task list or press ENTER to save your data. To add more detailed information, however, you must use the New Task window, shown in Figure 5-2. In the Task window, you can show the start and due dates, the status, and the priority of the task. You can also set a reminder for the task.

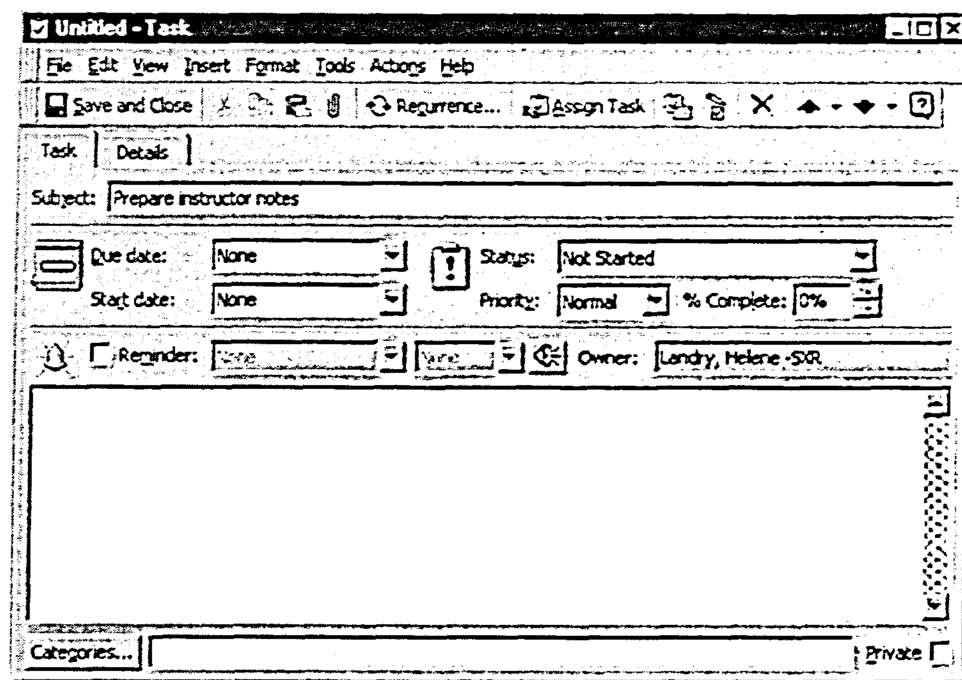


Figure 5-2: *The New Task Window*

You access the New Task window by clicking the New Task button on the toolbar. Table 5-1 summarizes the context-sensitive Tasks toolbar buttons.

Standard Toolbar		
Button	**Name**	**Function**
	New Task	Opens the New Task window so you can create a new task. The drop-down arrow gives you access to the New windows for the other Outlook features.
Advanced Toolbar		
	Current View	Filters your tasks by Active Tasks, Next Seven Days, Completed Tasks, and so forth. The drop-down arrow lets you select a filter.
	Group By Box	Groups your messages by a selected column header.
	AutoPreview	Sets your task list to display the subject line and the contents of the large text box at the bottom of the Task window.

Table 5-1: *The Tasks Toolbar Buttons*

METHOD

To create a task:

Task list method

1. Click the *Click here to add a new Task* text box.
2. In the text box, type the subject.
3. If necessary, click the Due Date text box.
4. Enter a due date.
   or
4. Click the Due Date drop-down arrow, and then select a date from the Date Navigator.
5. Click anywhere else on the task list.
   or
5. Press ENTER

New Task window method

1. On the toolbar, click the New Task button.
   or
1. From the Actions menu, choose New Task.
2. In the Task window, on the Task page, in the Subject text box, type the subject.

3. In the Start date combo box, type the start date or click the Start date drop-down arrow and choose a start date from the Date Navigator, and then in the Due date combo box, type the due date or click the Due date drop-down arrow and choose a due date from the Date Navigator.
4. If desired, set a reminder.
5. If desired, in the large text box at the bottom of the window, add notes.
6. On the toolbar, click the Save and Close button.

EXERCISE

In the following exercise, you will create tasks.

1.	Open the Tasks folder	*The task list appears in Simple List view.*
2.	Click the *Click here to add a new Task* text box	*The insertion point is in the subject text box. The word* ***None*** *appears in the Due Date text box.*
3.	Type **collect recipes for culinary course**	
4.	Click the Due Date text box	*The Due Date text box becomes a combo box.*
5.	Type **first Tuesday of next month**	*The text appears in the Date Due box.*
6.	Press **ENTER**	*The new task is added to the task list. The due date appears as a date.*
7.	On the toolbar, click the New Task button	*The New Task window appears.*
8.	On the Task page, in the Subject text box, type **Make signs for Food Festival stand**	
9.	In the Start Date drop down list box click the down arrow and choose the Today button	*Today's date appears in the Start combo box.*

10. In the Due Date drop down list box, click the down arrow, and choose the first Monday in next March — *The date of the first Monday in next March appears in the Due combo box.*

11. On the toolbar, click the Save and Close button — *The task appears on the task list.*

12. Add the tasks in Table 5-2 to your task list

END

Task	Start Date	Due Date
Buy copy pape	today	next Tuesday
Send fliers re: next month's specials to all customers who left business cards	next Monday	Friday after next Monday
Call suppliers about discounts for bulk orders	today	month from today

Table 5-2: *Additional Tasks for Task List*

Selecting and Editing a Task

Tasks are often not completed as initially conceived. You might find it necessary to change the end date of a task or to edit the task description. You edit tasks in the Task window. You can also make simple edits directly on the task list.

METHOD

To select a task:

1. Click the task.

To edit a task:

Task list or TaskPad method
1. Select the task.
2. Make the change.
3. Click anywhere else on the task list.
   or
3. Press ENTER

Task window method
1. Double-click the task.
   or
1. Select the task, and then, from the File menu, choose Open / Selected Items.
2. In the Task window, make the change.
3. On the toolbar, click the Save and Close button.

EXERCISE

In the following exercise, you will edit tasks.

1.	On the task list, click the *collect recipes for culinary course* Due Date text box	*The task is selected. The columns to the left of the due date become blue. The drop-down arrow appears.*
2.	Select the due date and type **tomorrow**	

3.	Click anywhere else on the task list	*Tomorrow's date appears in the Due Date text box. The edit is saved.*
4.	Click the *get info on food festival* Subject task box	*The task is selected. The columns to the left and the right of the subject become blue.*
5.	Double-click the task	*The* ***get info on food festival - Task*** *window appears.*
6.	In the Due combo box, select the text and then type **today**	
7.	Choose Save and Close	*The task list reappears. The task displays the new due date.*
8.	Click the *order new tablecloths* task	*The task is selected.*
9.	From the File menu, choose Open / Selected items	*The* ***order new tablecloths - Task*** *window appears.*
10.	In the notes area, change the number of square tablecloths to 12	
11.	On the toolbar, click the Save and Close button	*The task list reappears.*

END

Making a Task Recurring

Some tasks you do routinely—for example, you pick up your paycheck every other Friday. You can define these routine tasks as *recurring tasks* so that they are always on your task list. You see the task listed only once, but whenever you complete the task, the next occurrence then appears on the task list.

You schedule recurring tasks in the Task window using the Task Recurrence dialog box, shown in Figure 5-3. If a task already appears on your task list and you want to make it recurring, you can select the task, open its Task window, and then click the Recurrence button on the toolbar.

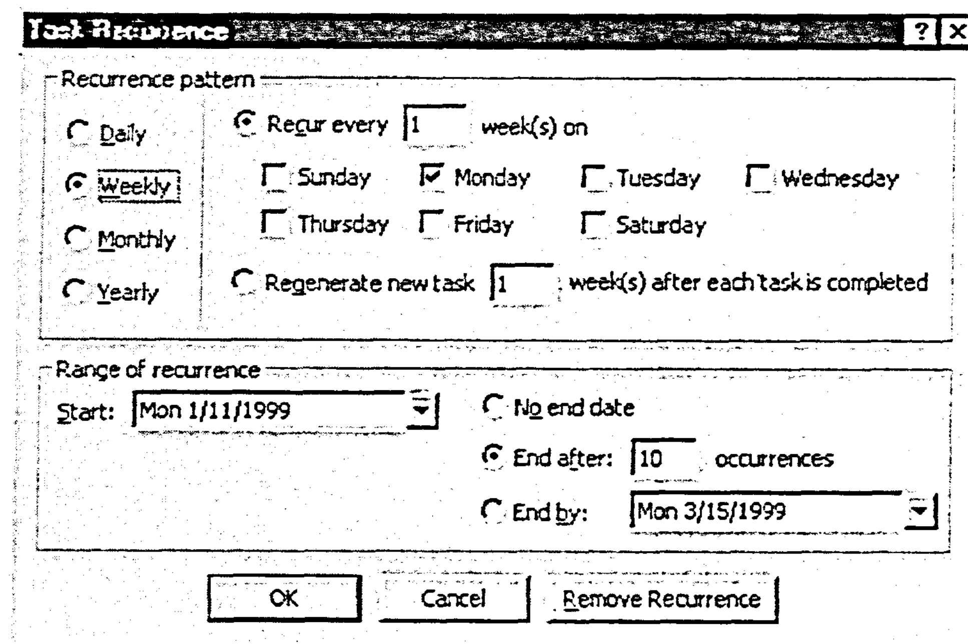


Figure 5-3: *The Task Recurrence Dialog Box*

Once you have designated a task as recurring, the Icon field displays the Recurring Task icon, a clipboard with the recurring task symbol, two arrows in a circle on a gray box, as shown in Figure 5-4. This symbol is similar to the recurring appointment symbol.

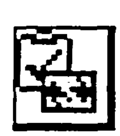


Figure 5-4: *The Recurring Task Icon*

METHOD

To make a task recurring:

1. Select a task and open the Task window.
   or
1. Create a task but do not close the Task window.
2. On the toolbar, click the Recurrence button.
3. In the Task Recurrence dialog box, in the Recurrence pattern area, in the left column, select a time period option button.
4. In the Recurrence pattern area, in the right column, select the appropriate option button or check boxes and, if necessary, fill in the required information in the appropriate text boxes.
5. In the Range of recurrence area, select the appropriate end date option button and fill in the required information.
6. Choose OK.
7. In the Task window, on the toolbar, click the Save and Close button.

EXERCISE

In the following exercise, you will make a task recurring.

1. Select the *send fliers re: next month's specials…* task and open the Task window
2. On the toolbar, click the Recurrence button — *The Task Recurrence dialog box appears.*
3. In the Recurrence pattern area, in the left column, select the Monthly option button.
4. In the Recurrence pattern area, in the right column, select the second option button
5. In the Range of recurrence area, select the End after option button, and then select the text in the text box and type **6**

6.	Choose OK	*The Task window reappears. An information area that tells you when the task is due, when the task starts, and how long it is effective appears just below the tabs.*
7.	On the toolbar, click the Save and Close button	*The task is recurring. The task list reappears. The icon cell displays the Recurring Task icon.*

END

Deleting and Restoring a Task

When you are no longer responsible for a task on your task list and you have not done any work on it, you should delete the item from your list. If you delete a task in error, you can immediately restore it.

Note: Since Outlook is a record of your activities, you should not delete partially completed and completed tasks. This can be especially important when auditors come by or when it is time for your annual performance appraisal.

METHOD

To delete a task:

1. Select the task.
2. On the toolbar, click the Delete button.

To restore a deleted task immediately after deleting it:

1. From the Edit menu, choose Undo Delete.
   or
1. On the advanced toolbar, click the Undo Delete button.

EXERCISE

In the following exercise, you will delete and restore a task.

1.	Select the *buy copy paper* task	
2.	On the toolbar, click the Delete button	*The task disappears from the task list.*
3.	On the advanced toolbar, click the Undo Delete button	*The task reappears on the task list.*

END

Managing Tasks

If you have many tasks, you might want to view your task list differently. As in the Mail folder, you can sort your tasks by clicking the column headers. In addition, you can filter your task list to show a subset of your tasks by clicking the Current View drop-down arrow.

The Tasks Current View drop-down list on the Advanced toolbar gives you numerous criteria to use to filter the messages. Table 5-3 summarizes the Tasks Current View filters.

Name	Function
Simple List	Shows the subject line, task type, status, and due date of all tasks.
Detailed List	Shows the Simple List with such additional details as priority, whether there are attachments, and categories.
Active Tasks	Shows only those tasks that are incomplete.
Next Seven Days	Shows only those tasks due in the next seven days.
Overdue Tasks	Shows only those tasks that are overdue.
By Category	Groups tasks by category.
Assignment	Groups tasks by who assigned them to you.
By Person Responsible	Groups tasks by who is responsible for their completion.
Completed Tasks	Shows only completed tasks.
Task Timeline	Graphically shows when each task was assigned, its duration, and its completion date.

Table 5-3: *The Tasks Current View Filters*

When you assign priorities to your tasks, you can decide which task to work on based on its importance and its due date. You should also track the status of a task and check it off when you complete it.

Setting the Priority for a Task

While it is important that you complete all tasks punctually, some tasks are more important than others, and you should work on them first. Outlook lets you set the priority on tasks so you can quickly evaluate how to best use your time. You can use the Task window to set your task priority or, if you already have a task on your list, you can display the list in a detailed view and add a priority symbol to the task by clicking the Priority column header, shown in Figure 5-5. The symbol for low priority is a blue arrow pointing down and for high priority is a red exclamation point. Normal priority has no symbol.

Figure 5-5: *The Priority Column Header*

Note: The Priority column header is not visible when you filter your Current View as Simple List or as Task Timeline.

METHOD

To set the priority for a task:

Task window method

1. Select a task and open the Task window.
   or
1. Create a task but do not close the Task window.
2. In the Task window, click the Priority drop-down list box, and then select a priority.
3. On the toolbar, click the Save and Close button.

Detailed list method

1. In any task list view that shows the Priority column, click the Priority column cell for the task.
2. From the drop-down list, select a priority.
3. Click anywhere on the task list.
   or
3. Press ENTER

EXERCISE

In the following exercise, you will set the priority for several tasks.

1. Open the *buy copy paper* Task window	
2. Click the Priority drop-down list box, and then select High	
3. On the toolbar, click the Save and Close button	*The task list reappears.*
4. On the toolbar, click the Current View drop-down list arrow, and then select Active Tasks	*A red exclamation point appears in the Priority column cell of the* ***buy copy paper*** *task.*
5. Click the priority column cell for the *get info on food festival* task	*A drop-down list appears.*
6. Select High	*A red exclamation point appears in the Priority column.*
7. Click anywhere on the task list	*The priority is saved.*

END

Tracking a Task's Status and Marking a Task Completed

Each time you work on a task, you should track its status on the Status page of the Task window, shown in Figure 5-6. You can enter such details as how many hours the task lasted, who to bill, who you contacted, and so forth on this page. You can show that a task is in progress and approximate how close to completion you are on the Task page.

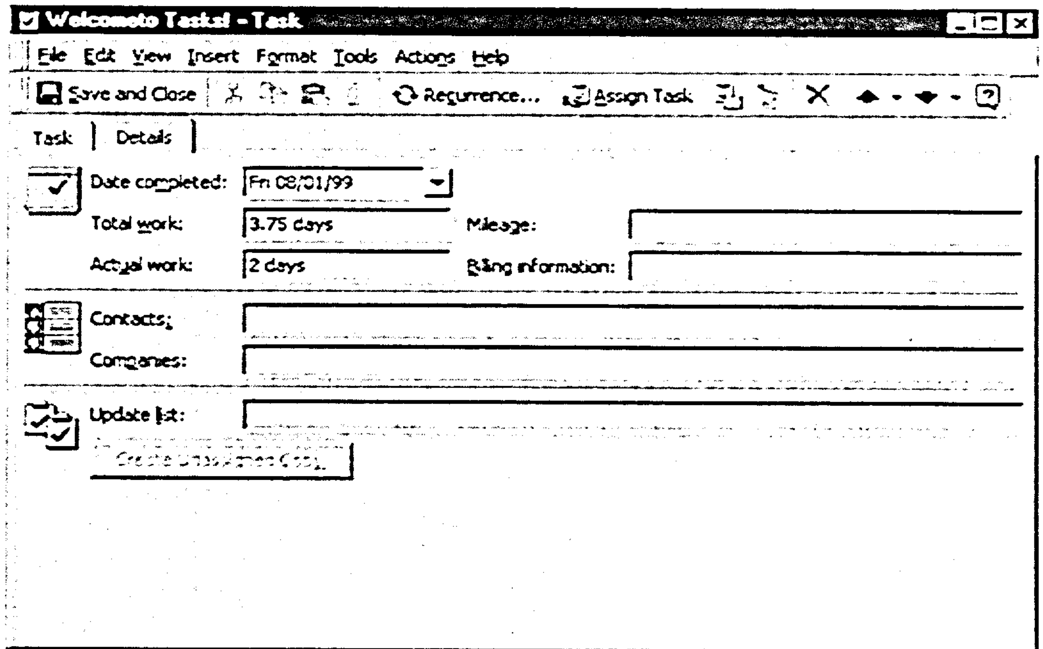


Figure 5-6: *The Details Page of the Task Window*

When you finish a task, you should mark it as completed so that it no longer appears on your active tasks list. You can simply check it off on your TaskPad or task list using the check box in the Complete column or you can mark it in the Task window. Figure 5-7 shows the Complete column header.

Figure 5-7: *The Complete Column Header*

Note: The Complete column header is only visible when you filter your Current View as Simple List.

METHOD

To track a task's status:

1. Open the task window.
2. On the Task page, click the Status drop-down list box, and then select a status.
3. In the % Complete spin box, click a spin arrow or enter a percentage.
4. Select the Details tab.
5. On the Details page, enter the desired details in the appropriate text boxes.
6. On the toolbar, click the Save and Close button.

To mark a task completed:

1. On the TaskPad or on the task list in Simple List view, select the Complete check box for the completed task.
   or
1. In the Task window, on the Task page, click the Status drop-down list box, and then select Completed.
2. On the toolbar, click the Save and Close button.

EXERCISE

In the following exercise, you will track a task's status and you will mark tasks completed.

1.	Open the Calendar folder	
2.	On the TaskPad, select the *buy copy paper* Complete check box	*A check appears in the Complete check box and a line appears through the subject.*
3.	Open the Tasks folder	
4.	Click the Current View drop-down list arrow, on the advanced toolbar and then select Simple List	
5.	On the task list, select the *order new tablecloths* Complete check box	*A check appears in the Complete check box and a line appears through the subject and the due date.*

6.	From the task list, open the *call suppliers about discounts for bulk orders* Task window	
7.	On the Task page, click the Status drop-down list box, and then select In Progress	
8.	In the % Complete spin box, type **10%**	
9.	On the toolbar, click the Save and Close button	*The task list reappears.*
10.	From the task list, open the *get info on food festival* Task window	
11.	On the Task page, click the Status drop-down list box, and then select Completed.	*The text in the % Complete text box becomes 100%.*
12.	Select the Details tab	*The Details page appears.*
13.	In the Total work text box, type **20 minutes**	
14.	In the Actual work text box, type **20 minutes**	
15.	In the Mileage text box, type **none**	
16.	On the toolbar, click the Save and Close button	*The task list reappears. A check appears in the Complete check box and a line appears through the subject and the due date.*

END

Using Task Timeline View

Filtering the Current View as Task Timeline, shown in Figure 5-8, shows you your task list in timeline format. When you view your tasks with this filter, you can visually analyze which tasks you must work on to complete everything in a timely fashion. You can open the Task window from this view to enter data.

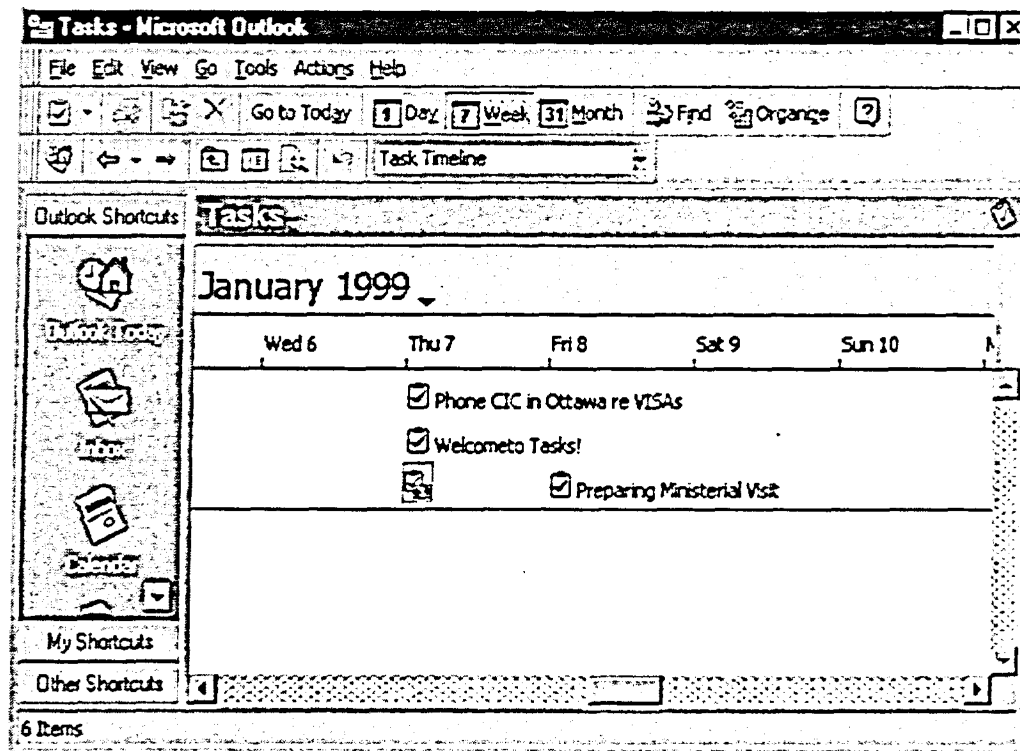


Figure 5-8: *The Tasks Folder in Task Timeline View*

METHOD

To use Task Timeline view:

1. On the Advanced toolbar, click the Current View drop-down arrow, and then select Task Timeline.
2. Examine the timelines.
3. If desired, select a task, and then double-click it.
4. In the Task window, make desired changes.
5. On the toolbar, click the Save and Close button.

EXERCISE

In the following exercise, you will use Task Timeline view.

1.	On the advanced toolbar, click the Current View drop-down arrow	*The drop-down list appears.*
2.	Select Task Timeline	*The task list appears in Task Timeline view.*
3.	Examine the list	
4.	Return the Current View to Simple List	

END

Section 5 Summary

To create a task:

Task list method

1. Click the *Click here to add a new Task* text box.
2. In the text box, type the subject.
3. If necessary, click the Due Date combo box.
4. Enter a due date.

   or

4. Click the Due Date drop-down arrow, and then select a date from the Date Navigator.
5. Click anywhere else on the task list.

   or

5. Press ENTER

New Task window method

1. On the toolbar, click the New Task button.

   or

1. From the Actions menu, choose New Task.
2. In the Task window, on the Task page, in the Subject text box, type the subject.
3. In the Start date combo box, type the start date or click the Start date drop-down arrow and choose a start date from the Date Navigator, then in the Due date combo box, type the due date or click the Due date drop-down arrow and choose a due date from the Date Navigator.
4. If desired, set a reminder.
5. If desired, in the large text box at the bottom of the window, add notes.
6. On the toolbar, click the Save and Close button.

To select a task:

1. Click the task.

To edit a task:

Task list or TaskPad method

1. Select the task.
2. Make the change.
3. Click anywhere else on the task list.

   or

3. Press ENTER

Task window method

1. Double-click the task.

   or

1. Select the task, and then, from the File menu, choose Open.
2. In the Task window, make the change.
3. On the toolbar, click the Save and Close button.

To delete a task:

1. Select the task.
2. On the toolbar, click the Delete button.

To restore a deleted task immediately after deleting it:

1. From the Edit menu, choose Undo Delete.

   or

1. On the Advanced toolbar, click the Undo Delete button.

To make a task recurring:

1. Select a task and open the Task window.

   or

1. Create a task but do not close the Task window.
2. On the toolbar, click the Recurrence button.

3. In the Task Recurrence dialog box, in the Recurrence pattern area, in the left column, select a time period option button.
4. In the Recurrence pattern area, in the right column, select the appropriate option button or check boxes and, if necessary, fill in the required information in the appropriate text boxes.
5. In the Range of recurrence area, select the appropriate end date option button and fill in the required information.
6. Choose OK.
7. In the Task window, on the toolbar, click the Save and Close button.

To set the priority for a task:

Task window method
1. Select a task and open the Task window.
   or
1. Create a task but do not close the Task window.
2. In the Task window, click the Priority drop-down list box, and then select a priority.
3. On the toolbar, click the Save and Close button.

Detailed list method
1. In any task list view that shows the Priority column, click the Priority column cell for the task.
2. From the drop-down list, select a priority.
3. Click anywhere on the task list.
   or
3. Press ENTER

To track a task's status:

1. Open the task window.
2. On the Task page, click the Status drop-down list box, and then select a status.
3. In the % Complete spin box, click a spin arrow or enter a percentage.
4. Select the Details tab.
5. On the Details page, enter the desired details in the appropriate text boxes.
6. On the toolbar, click the Save and Close button.

To mark a task completed:

1. On the TaskPad or on the task list in Simple List view, select the Complete check box for the completed task.
   or
1. In the Task window, on the Task page, click the Status drop-down list box, and then select Completed.
2. On the toolbar, click the Save and Close button.

To use Task Timeline view:

1. On the Advanced toolbar, click the Current View drop-down arrow, and then select Task Timeline.
2. Examine the timelines.
3. If desired, select a task, and then double-click it.
4. In the Task window, make desired changes.
5. On the toolbar, click the Save and Close button.

Section 5 *Self-Check Exercise*

1. Add **hire assistant chef** to your task list. Set the priority as high.
2. Add **make kitchen clean-up check list** to your task list.
3. Add **send out Greater New Orleans Restaurant Association mailing** to your task list. Set this up as a task that recurs monthly on the fifth of each month. Show this as a one-year commitment.
4. You have an hour appointment to interview Fatty LaMonte tomorrow morning for the assistant chef position. Show the *Hire assistant chef* task as in progress and 25 percent complete.
5. Change the *collect recipes for culinary course* task to read **get recipes from Charlotte for culinary course**
6. Delete the *Make signs for Food Festival stand* task, and then restore it.
7. Examine your task list in Task Timeline view. Then, view your task list in Next Seven Days view.

Section 6

Keeping a Journal and Utilizing Notes

- Tracking Activities
- Working with Notes

Section Skills and Their Importance

In the following section you will learn to:

- **Track activities**
  You can set your Journal to record your activities each time you open a document in any of the Microsoft Office 98 suite of applications. You can also add to your Journal manually. Then you can use different Journal views to analyze how you spend your time and to show what documents you worked on and when you worked on them. In addition, you can set up the Journal so that you can use a Journal entry as a shortcut to the document shown.

- **Work with notes**
  Outlook lets you jot down notes that you can leave on-screen, edit, and delete. These notes are of the informal, sticky note type. You can color code your notes to help you find those related to one subject more easily. You can also change the size of the note icons in the information viewer.

Tracking Activities

The Journal is a folder in which you can record the occurrence of certain items such as meetings, tasks or E-mail messages. You can set options to record items that you send, receive, or create for selected contacts. Figure 6-1 shows a sample journal viewed by entry type in month view. The timeline shows E-mail messages and when they were opened.

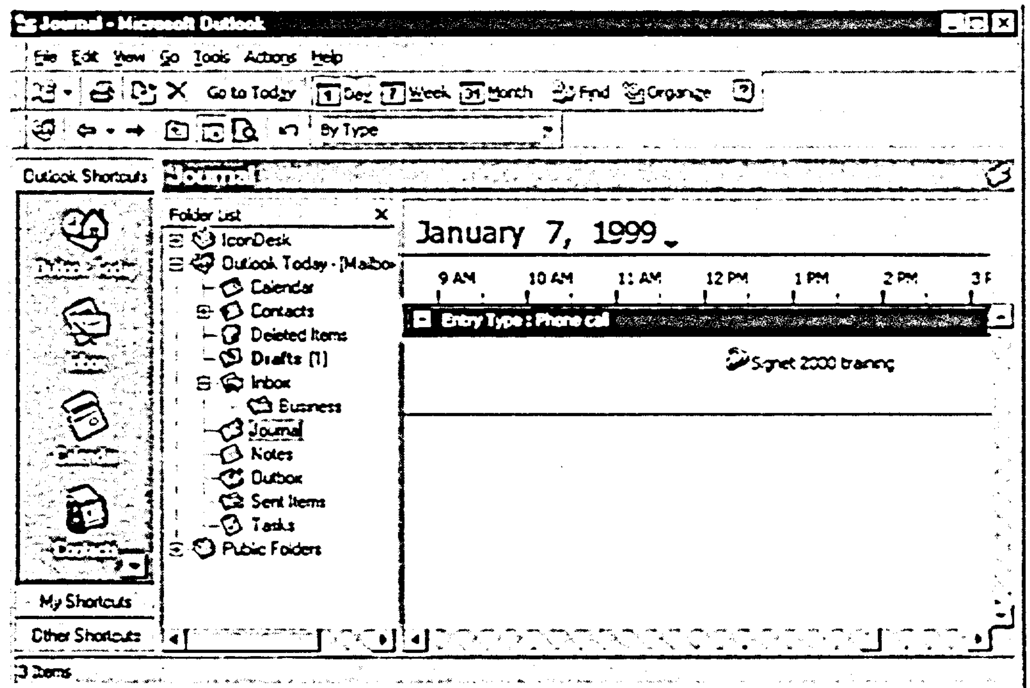


Figure 6-1: *A Sample Journal Filtered by Entry Type in Month View*

You can set up the Journal to record your Outlook activities automatically. You can also list your other activities manually, whether you want to record a conversation, an appointment, a contact, or anything else of importance.

You might need to verify when you worked on a document or talked with a colleague. In such a case, you can use your Journal to find your activity. Several filters show timelines that emphasize the date and duration of the contact, while the remaining filters document the quantity of activity. You can change whether the timeline displays a day, a week, or a month by clicking the Day, Week, or Month buttons on the toolbar, as you did in the Calendar folder. If you want to open a document that is listed in your Journal, you can open it directly from the Journal listing.

The Journal Current View drop-down list gives you numerous criteria to use to filter the activities. Table 6-1 summarizes the Journal Current View filters.

Name	Function
By Type	Groups activities by application type in timeline format.
By Contact	Groups activities by contact in timeline format.
By Category	Groups activities by category in timeline format.
Entry List	Lists all activities recorded. Shows the date, duration, contact, and category.
Last Seven Days	Shows the entry list for the last seven days.
Phone Calls	Lists phone calls.

Table 6-1: *The Journal Current View Filters*

Table 6-2 summarizes the context-sensitive Journal toolbar buttons.

Button	Name	Function
	New Journal	Opens the New Journal Entry window so you can create a new activity. The drop-down arrow gives you access to the New windows for the other Outlook features.
By Type	Current View	Filters your journal items by Type, Contact, Last Seven Days, and so forth. The drop-down arrow lets you select a filter.
Go to Today	Go to Today	Displays today's date in Day, Week, or Month Current View.
1 Day	Day	Displays one day on the timeline.
7 Week	Week	Displays one week on the timeline.
31 Month	Month	Displays one month on the timeline.

Table 6-2: *The Journal Toolbar Buttons*

Recording Activities Automatically

You set up the Journal to record your activities automatically in the Journal Options dialog box, shown in Figure 6-2. This dialog box governs recording e-mail messages, meetings, tasks assigned to others, activities with contacts. You access the Journal Options dialog box from the Preferences page of the Options dialog box.

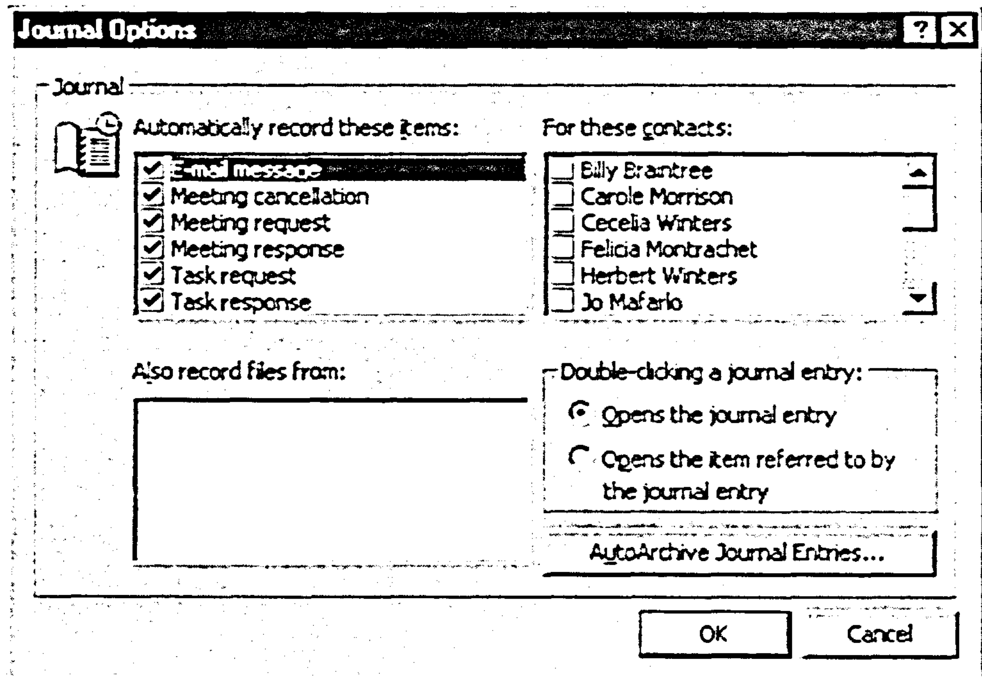


Figure 6-2: *The Journal Page of the Options Dialog Box*

METHOD

To record activities automatically:

1. From the Tools menu, choose Options.
2. Select the Preferences tab.
3. Click on the Journal Options button.
4. In the Journal Options dialog box, in the *Automatically record these items:* list, select the appropriate check boxes.
5. In the *For these contacts:* area, select the appropriate check boxes.
6. Choose OK.

Recording Activities Manually

You use the New Journal Entry window, shown in Figure 6-3, to record manually such activities as conversations, timesheet data, and letters and faxes sent and received that you cannot record automatically. You access the New Journal Entry window by clicking the New Journal button on the Standard toolbar.

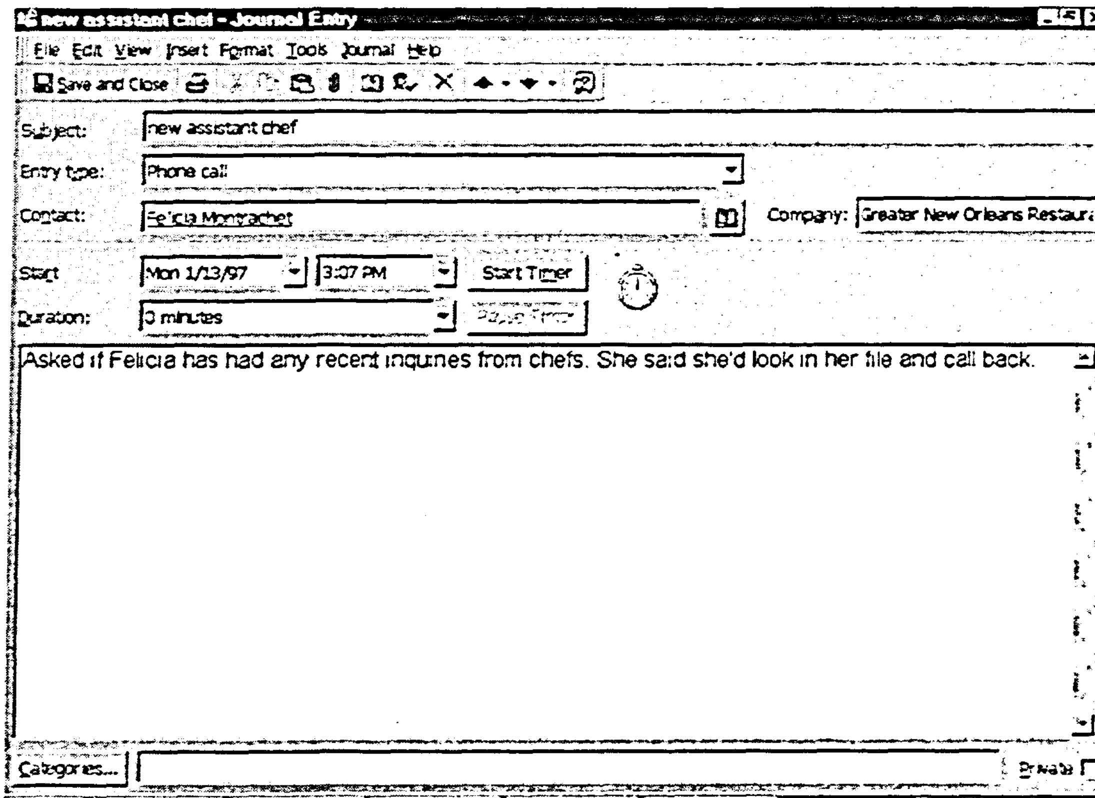


Figure 6-3: *The New Journal Entry Window*

METHOD

To record activities manually:

1. On the Journal toolbar, click the New Journal button.
   or
1. From the Journal menu, choose New Journal Entry.
2. In the New Journal Entry window, in the Subject text box, type a description.
3. In the Entry type drop-down list box, select the entry type.
4. Fill in the remaining text boxes, as appropriate.
5. On the toolbar, click the Save and Close button.

EXERCISE

In the following exercise, you will record activities manually.

1. On the Journal toolbar, click the New Journal button — *The New Journal Entry window appears.*
2. In the Subject text box, type **new assistant chef**
3. Make sure that Phone call is selected as the Entry type
4. In the Contact text box, type **Felicia Montrachet**
5. In the Company text box, type **Greater New Orleans Restaurant Assoc.**
6. In the large text box at the bottom of the window, type **Asked if Felicia has had any recent inquiries from chefs. She said she'd look in her file and call back.**
7. On the toolbar, click the Save and Close button — *The Journal reappears showing Entry Type: Phone Call.*
8. Expand the Entry Type: Phone Call — *Your phone call activity appears.*
9. Change the Current View to By Contact — *Your contact with Felicia Montrachet appears. In addition, the list includes the author of this book as the contact for* ***Journal.doc****.*

END

Setting Shortcut Opening Options and Using a Journal Entry as a Shortcut

Suppose you are looking for a document you worked on a week ago and you can no longer recall its name. You can open items you tracked in your Journal to find the document you want.

The way you set up the Journal page of the Options dialog box determines whether you open the document directly or you open the Journal Entry window and then the document. By default, double-clicking opens the Journal Entry window.

METHOD

To set shortcut opening options:

1. From the Tools menu, choose Options.
2. On the Preference page of the Options dialog box, click the Journal Options button and in the *Double-clicking a journal entry:* area, select an option button.
3. Choose OK.

To use a Journal entry as a shortcut:

1. Double-click the Journal entry.
2. If necessary, in the Journal Entry window, double-click the shortcut in the large text box at the bottom of the window.

EXERCISE

In the following exercise, you will set shortcut opening options and you will use a Journal entry as a shortcut.

1.	Change the view to Last Seven Days	
2.	If necessary, position the double-headed mouse pointer over the border that separates the Subject and the Start column headers, and then drag the border to the right	*The Subject column becomes wider, allowing you to see the whole drive path.*

3.	In the Subject column, double-click **A:\Journal.doc**	*The Journal.doc Journal Entry window appears.*
4.	In the large text box at the bottom of the window, double-click the **Journal.doc** shortcut	*Word Perfect 8.0 loads and the document opens.*
5.	Close the document and exit from Word Perfect 8.0	*The Journal Entry window reappears.*
6.	Close the Journal Entry Window	*The Journal reappears.*

END

Working with Notes

Outlook's Notes folder lets you write casual sticky notes to yourself that you can leave on-screen as a reminder. If you have notes related to an appointment, a contact, or a task, you should write such notes in the text boxes provided in the entry windows. You can write and edit the sticky notes and delete them when you no longer need them.

Table 6-3 describes the functions of the Notes toolbar buttons.

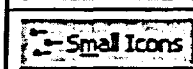
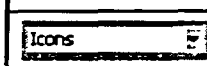
Button	Name	Function
Standard Toolbar		
	New Note	Opens a New Note so you can create a new memo. The drop-down arrow gives you access to the New windows for the other Outlook features.
	Large icons	Shows files and items as large icons.
	Small icons	Shows files and items as small icons.
	List	Shows files and items as a list.
Advanced Toolbar		
	Current View	Filters your notes by icons, list, last seven days, color, and so forth. The drop-down arrow lets you select a filter.

Table 6-3: *The Notes Toolbar Buttons*

You filter the Notes using the Current View drop-down list. Table 6-4 lists the built-in filters.

Name	Function
Icons	Displays an icon and the full text of each note.
Notes List	Lists each note and lets you sort by subject, date created, and category.
Last Seven Days	Lists the notes created in the last seven days.
By Category	Groups notes by category.
By Color	Groups notes by color.

Table 6-4: *The Notes Current View Filters*

Writing a Note

You write notes in the Notes folder. When you click the New Note button, you see an untitled note that has the current date and time at its bottom. When you finish writing a note, as shown in Figure 6-4, you click its Close button to store it in the Notes folder.

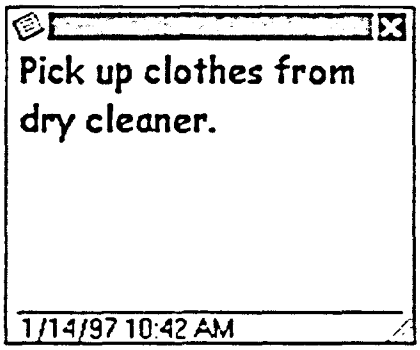


Figure 6-4: *A Note*

METHOD

To write a note:

1. In the Notes folder, click the New Note button.
   or
1. From the Note menu, choose New Note.
2. On the note, type your text.
3. Click anywhere outside the note to leave the note open.
   or
3. Click the Close button to close the note.

EXERCISE

In the following exercise, you will write notes.

1.	Open the Notes folder	*Your notes appear.*
2.	On the toolbar, click the New Note button	*An untitled note appears.*
3.	On the note, type **Pick up clothes from dry cleaner.**	
4.	Click outside the note	*The note stays open and appears in the information viewer and on the taskbar.*
5.	From the Note menu, choose New Note	*An untitled note appears.*
6.	On the note, type **Ask Charlotte to attend the interview tomorrow.**	
7.	Click the Close button	*The note is closed and appears in the information viewer.*
8.	On the taskbar, click the dry cleaner note	*The note becomes active.*
9.	Close the note	

END

Opening and Editing a Note

A note must be open to edit it. You use the same editing techniques that you use in Word or in your e-mail.

METHOD

To open a note:

1. Double-click the note.

To edit a note:

1. If necessary, open the note.
2. Make the changes.
3. If desired, close the note.

EXERCISE

In the following exercise, you will open and edit a note.

1.	Double-click the note that says, *Ask Charlotte to attend the interview tomorrow.*	*The note opens.*
2.	Between the word *Charlotte* and the word *to* type **today**	*The word is inserted.*
3.	Close the note	

END

Organizing Notes

Besides sorting and viewing your notes just as you do other Outlook data, you can color code your notes and you can change the icon size to read your notes better.

Color Coding a Note

When you color code your notes by subject, category, project, or other criteria, you can quickly identify related notes when you are looking at the notes in Icon view. You change the color of a note when the note is open.

METHOD

To color code a note:

1. Open the note.
2. In the upper-left corner of the note, click the note icon.
3. From the drop-down menu, choose Color.
4. From the submenu, choose a color.
5. If desired, close the note.

EXERCISE

In the following exercise, you will color code a note.

1.	Open the *Ask Charlotte today to attend the interview tomorrow* note	
2.	In the upper-left corner of the note, click the note icon	*A drop-down menu appears.*
3.	Choose Color	*A submenu appears.*
4.	Choose Pink	*The color of the note changes to pink.*
5.	Close the note	
6.	Change the Current View to By Color	*The notes are grouped by color.*

7. Expand the Pink notes — *The* ***Ask Charlotte today to attend the interview tomorrow*** *note appears.*

8. Collapse the notes, and then change the Current View back to Icons

END

Changing Icon Size

You can change the size of the note icons just as you change icon size in Windows Explorer. Outlook provides three buttons on the standard toolbar that determine icon size and placement—Large Icons, Small Icons, and List—shown in
Figure 6-5.

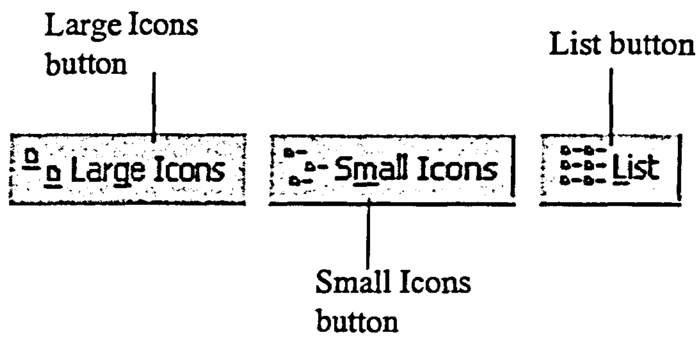


Figure 6-5: *The Icon Buttons*

The large icon size is the default size. When you click the Large Icon button, the notes are arranged horizontally across the information viewer with the text below each icon. When you click the Small Icon button, the icons are arranged horizontally with the text to the right of each icon. Clicking the List button gives you small icons arranged in a vertical list with the text to the right of each icon.

METHOD

To change icon size:

1. On the standard toolbar, click an Icon button.

EXERCISE

In the following exercise, you will change icon size.

1.	On the toolbar, click the Small Icons button	*The icons become small and display the text to the right of the icons.*
2.	On the toolbar, click the List button	*The icons appear in a vertical list with the text to the right of the icons.*
3.	On the toolbar, click the Large Icons button	*The icons become large and display horizontally with the text below the icons.*

END

Section 6 Summary

To record activities automatically:

1. From the Tools menu, choose Options.
2. Select the Preferences tab.
3. Click on the Journal Options button.
4. In the Journal Options dialog box, in the *Automatically record these items:* list, select the appropriate check boxes.
5. In the *For these contacts:* area, select the appropriate check boxes.
6. Choose OK.

To record activities manually:

1. On the Journal toolbar, click the New Journal button.
   or
1. From the Journal menu, choose New Journal Entry.
2. In the New Journal Entry window, in the Subject text box, type a description.
3. In the Entry type drop-down list box, select the entry type.
4. Fill in the remaining text boxes, as appropriate.
5. On the toolbar, click the Save and Close button.

To set shortcut opening options:

1. From the Tools menu, choose Options.
2. On the Journal page of the Options dialog box, in the *Double-clicking a journal entry:* area, select an option button.
3. Choose OK.

To use a Journal entry as a shortcut:

1. Double-click the Journal entry.
2. If necessary, in the Journal Entry window, double-click the shortcut in the large text box at the bottom of the window.

To write a note:

1. In the Notes folder, click the New Note button.
   or
1. From the Note menu, choose New Note.
2. On the note, type your text.
3. Click anywhere outside the note to leave the note open.
   or
3. Click the Close button to close the note.

To open a note:

1. Double-click the note.

To edit a note:

1. If necessary, open the note.
2. Make the changes.
3. If desired, close the note.

To color code a note:

1. Open the note.
2. In the upper-left corner of the note, click the note icon.
3. From the drop-down menu, choose Color.
4. From the submenu, choose a color.
5. If desired, close the note.

To change icon size:

1. On the standard toolbar, click an Icon button.

Section 6 Self-Check Exercise

1. Reset the Journal so that it no longer automatically records your e-mail, meeting, and task-related activities. Set double-clicking to open the Journal entry.

2. Add a fax from Felicia Montrachet to your Journal. Felicia sent you three assistant chef referrals.

3. View your Journal by phone calls. Add a call to Felicia Montrachet to thank her for the fax.

4. View your Journal by type. Expand the view to see all your phone calls.

5. Write a note to invite your sister to visit for Mardi Gras. Change the text to include her family.

6. Make all the personal notes blue and the business notes pink.

7. Change the Current View to By Color. Expand the Notes list so you can see all notes.

8. Change the Current View to Icons. Change to small icons.

9. Exit and log off from Outlook.

Section 7

Using Advanced Management Features

- Using Outlook Today
- Managing Items
- Customizing Outlook
- Organizing Messages
- Creating Rules

Section Skills and Their Importance

In the following section you will learn to:

- **Use Outlook Today**
  Outlook Today lets you view your Calendar appointments and Tasks for the current date. You may also access your Inbox messages and find Contacts.

- **Manage items**
  As you accumulate Outlook items, you can archive inactive items to store them out of your way. When you need an archived item, you can import your archived files to use them. Outlook provides search tools to help you find items you misplace. When you add categories to your items, you can group them and find them faster. When you work with long lists, Outlook's grouping feature helps you display only the items you want to examine. You can also create your own filters to display specific items.

- **Customize Outlook**
  You can set your Outlook options to achieve the look you want. You can add, move, and delete shortcuts on the Outlook Bar.

- **Organizing messages**
  Outlook makes it easy for you to organize your Inbox by using the Organize page. You can create and move messages to folders and color code messages from the Organize pane.

- **Creating Rules**
  Rules allow you to specify how you want you incoming mail handled. You may create simple rules using the Organize pane or use the Rules wizard create detailed rules.

Using Outlook Today

When you click the Outlook Today shortcut on the Outlook Bar, the Outlook Today folder opens. By default Outlook Today gives you a comprehensive overview of your calendar and tasks for the next five days. It also lets you know how many messages are in your Inbox. In addition, Outlook Today lets you quickly find a contact. You can customize Outlook Today so that items are displayed in the way you prefer. Figure 7-1 shows the Outlook Today page.

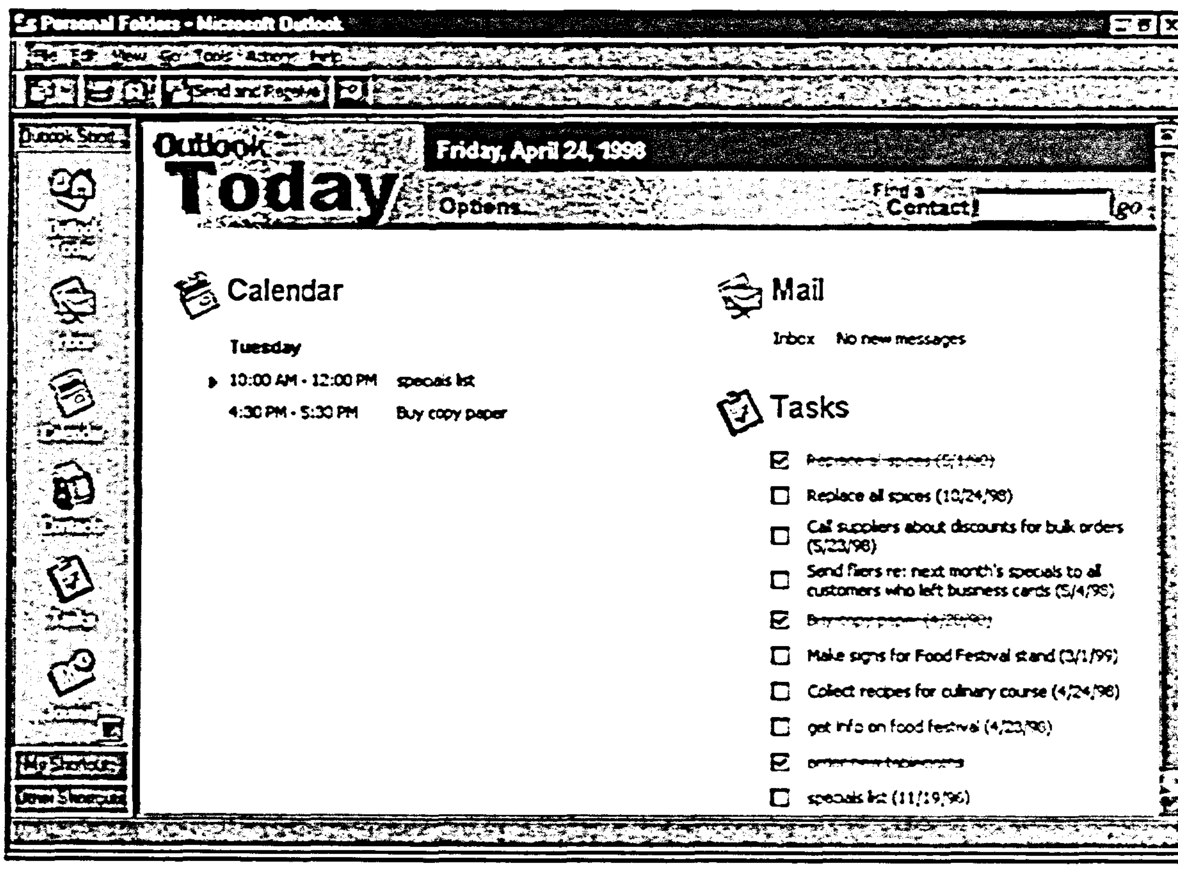


Figure 7-1: *The Outlook Today Page*

Navigating with Outlook Today

On the Outlook Today page, when you point to a folder shortcut, a folder name, or an individual item, the pointer becomes a hand and, if appropriate, the name or item is underlined. Clicking the shortcut or folder name opens the folder, just as clicking a shortcut on the Outlook Bar displays the folder. Clicking an item opens the item window.

METHOD

To open an Outlook folder in Outlook Today

1. On the Outlook Today page, point to a folder shortcut or a folder name.
2. When the pointer becomes a hand or when the folder name is underlined, click the shortcut or name.

To open a calendar item in Outlook Today

1. On the Outlook Today page, point to the calendar item.
2. When the pointer becomes a hand and the item is underlined, click the item.

Completing a Task in Outlook Today

When you are working with tasks in Outlook Today, you can do more than just open a task window to examine a task. You can also mark a task completed on the Outlook Today page.

METHOD

To complete a task in Outlook Today

1. Click the check box to the left of the task.

Finding a Contact in Outlook Today

The Find a Contact text box, which appears in the upper right of the Outlook Today page, lets you search for a contact. To do so, type the contact's name in the text box, and then click the word *go* that appears to the right of the box. As appropriate, Outlook searches your address books and contact records for the contact. Depending on the results of the search, Outlook might give you the opportunity to select the appropriate contact from a list before displaying the contact's information.

METHOD

To find a contact in Outlook Today

1. In the Find a Contact text box, type the contact name.
2. To the right of the text box, point to the word *go*.
3. When the pointer becomes a hand and the word *go* is underlined, click the word.
4. If necessary, in the Advanced Find window, double-click the found contact record.
   or
4. If necessary, in the Check Names dialog box, select the desired contact from the list and then choose Properties.
5. As desired, close the dialog box(es).

Setting Outlook Today Options

You can customize Outlook Today to display from one to seven days in the calendar. You can also customize Outlook Today to display a simple task list showing all active tasks or only today's tasks. If you prefer, you can set Outlook Today to become the Outlook startup page, which means that the Outlook Today will appear when you start the program. If you change your mind about options you set, you can redefine them at any time.

METHOD

To set Outlook Today options

1. On the Outlook Today page, at the top of the page, point to the word *Options*.
2. When the pointer becomes a hand and the word *Options* is underlined, click the word.
3. As appropriate, on the Outlook Today Options page, define the desired options.
4. At the top of the page, point to the words *Back to Outlook Today*.
5. When the pointer becomes a hand and the words are underlined, click the words.

Managing Items

When your Outlook items become out of date, you can store them or delete them. You can *archive* them automatically after a specified time interval or archive them manually. When you archive your items, you store them in your My Documents folder on your hard drive. You can retrieve archived items at any time.

Another way to make item management easier for yourself is to specify *categories* for your items. A category is a keyword or a phrase you add to an item to help identify it. Designating categories helps you find and group your items. In addition, by creating your own filters, you can show and hide items according to your own criteria.

Setting Up AutoArchiving

In no time, you can collect a tremendous amount of Outlook data, especially e-mail messages, that can crowd your folders and make it difficult to find wanted items. You can manually transfer individual files to a storage area, but it is more efficient to let Outlook archive older data on a regular basis and store the data for you in your My Documents folder.

Setting up AutoArchiving is a two-step process: First you set the intervals in the AutoArchive dialog box, shown in Figure 7-2. You access the AutoArchive dialog box from the Other page of the Tool / Options dialog box. Then you set the options in the Properties dialog box for each folder. You set the options in each folder's Properties dialog box except for the Contacts folder, which cannot be AutoArchived.

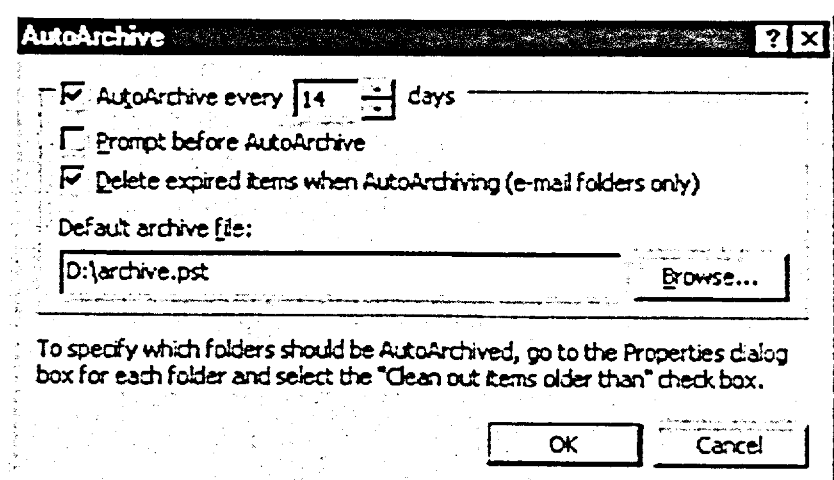


Figure 7-2: *The AutoArchive Dialog Box*

The default *aging period* for Calendar, Tasks, and Journal is six months; for Sent Items and Deleted Items, it is two months. By default, Outlook archives your data every two weeks. This means that every two weeks Outlook checks your data files to see if any are older than their aging period. When Outlook finds files that fit this profile, it asks you at start up whether to archive them. You can change the aging period for each folder on the AutoArchive page of a folder's Properties dialog box.

If you want to AutoArchive the data in your Inbox and Notes folders, you must turn on the AutoArchive feature for these folders yourself. You turn on the AutoArchive feature for these folders using the AutoArchive page of the Properties dialog box for the folder you want to archive. Figure 7-3 shows the AutoArchive page of the Inbox Properties dialog box.

After you set up AutoArchiving, the feature automatically activates whenever you start Outlook. If the aging period for a folder has expired, Outlook displays a message box at startup that asks, *Do you want to AutoArchive now?* You then choose whether to complete the archiving process. If you do not choose to archive at the time of the notice, Outlook does not notify you about archiving again until the AutoArchive period for the next folder has expired.

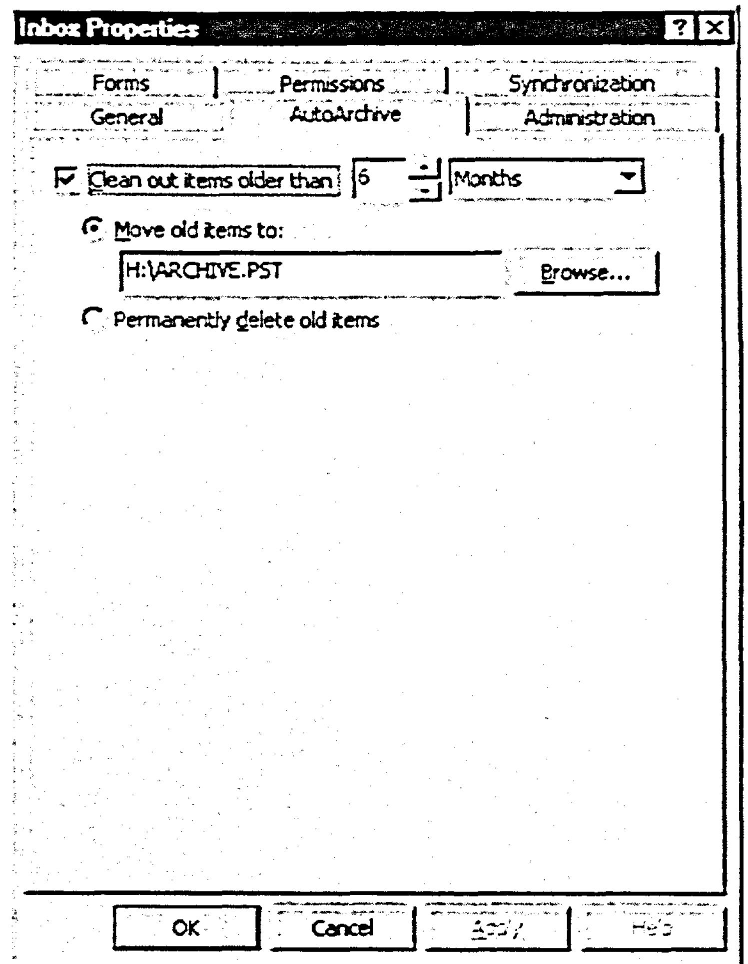


Figure 7-3: *The AutoArchive Page of the Inbox Properties Dialog Box*

METHOD

To set up AutoArchiving:

1. From the Tools menu, choose Options.
2. In the Options dialog box, select the Other tab.
3. On the Other page, click the *AutoArchive* button.
4. In the *AutoArchive every...day(s) at startup* spin box, enter the number of days.
5. Choose OK and close the Options dialog box.
6. On the Outlook Bar, right-click an Outlook shortcut.
7. In the shortcut menu, choose Properties.
8. In the Properties dialog box, select the AutoArchive tab.
9. On the AutoArchive page, if necessary, select the *Clean out items older than* check box.

10. In the *Clean out items older than* spin box, enter the number of units, and from the drop-down list, select the calendar period.
11. If necessary, choose Browse, and in the Find Personal Folders dialog box, select the drive and path for the archive file.
12. Choose OK.

EXERCISE

In the following exercise, you will set up AutoArchiving.

1.	Start Outlook and log on	*Reminders might appear.*
2.	If necessary, dismiss all reminders	
3.	Open the Tasks folder	*The task list appears in the information viewer.*
4.	Make sure the Current View is Simple List	
5.	Sort the list by Due Date, displaying the oldest task first	
6.	From the Tools menu, choose Options	*The Options dialog box appears.*
7.	Select the Other tab	*The Other page appears.*
8.	Click the AutoArchive button	*The AutoArchive dialog box appears*
9.	Make sure the *AutoArchive every* check box is selected	
10.	In the *AutoArchive every ... day(s) at startup* spin box, enter **7**	
11.	Make sure the *Default archive file:* area displays the file path **D:\archive.pst**	
12.	Choose OK	
13.	On the Outlook Bar, right-click the Journal shortcut	*The shortcut menu appears.*

14. Choose Properties — *The Journal Properties dialog box appears.*

15. Select the AutoArchive tab — *The AutoArchive page appears.*

16. In the *Clean out items older than* spin box, enter **2**, and in the drop-down list box, make sure Months is selected

17. Choose Browse

18. In the Find Personal Folders dialog box, select **D:\archive.pst**

19. Choose OK — *The data in the Journal older than two months is set to be archived the next time you open Outlook.*

END

Archiving Manually

If you want to archive a folder immediately, you use the Archive dialog box, shown in Figure 7-4, which you access from the File menu. If you want to archive your Contacts folder, you can only archive it manually.

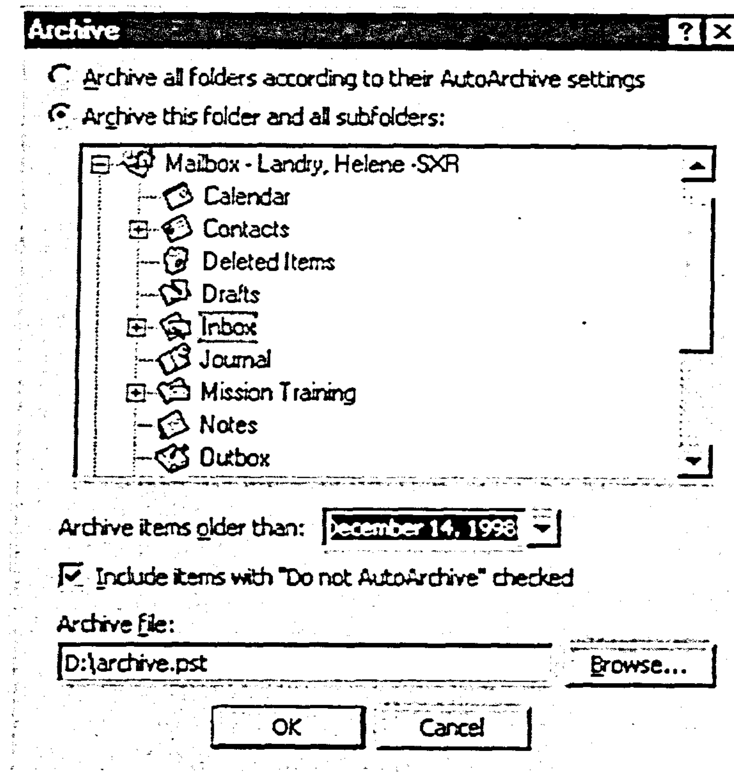


Figure 7-4: *The Archive Dialog Box*

METHOD

To archive manually:

1. From the File menu, choose Archive.
2. In the Archive dialog box, select the *Archive this folder and all subfolders:* option button.
3. In the folder list, select a folder.
4. From the *Archive items older than:* drop-down Date Navigator, select a date.
5. Choose OK.

EXERCISE

In the following exercise, you will archive manually.

1.	From the File menu, choose Archive	*The Archive dialog box appears.*
2.	Make sure the *Archive this folder and all subfolders:* option button is selected	
3.	In the folder list, make sure the Tasks folder is selected	
4.	From the *Archive items older than:* drop-down Date Navigator, select today's date two months ago	
5.	In the Archive file text box, make sure **D:\archive.pst** appears	
6.	Choose OK	*The items in the Tasks folder older than two months are archived.*
7.	If a message box appears that says, *AutoArchive is ready to archive now. Do you want to have old items archived now?* Choose No	

END

Retrieving Archived Items

Once the aging period has been reached, Outlook sends you a message at startup that asks if you want it to AutoArchive your files. Your Yes response activates archiving, and Outlook stores your old files for you.

The easiest way to retrieve archived items is to open the archive file, D:\archive.pst. When you open d:\archive.pst, Outlook will create a new mailbox called Archive Folders, seen in Figure 7-5, which will remain in your Folder List until you choose to remove it. Once the Archive Folders is in your Folder list you will not have to open d:\archive.pst to retrieve your archived items since they will automatically appear in the Archive Folders.

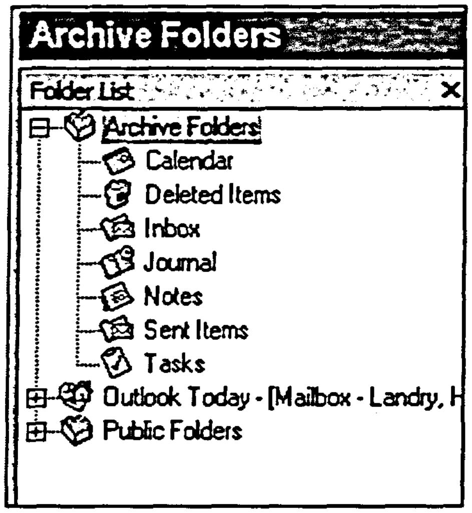


Figure 7-5: *The Archive Folders in the Folder List*

METHOD

To retrieve archived items:

1. From the File menu, choose Open, Personal Folders File (.pst).
2. Select D:\archive.pst.
3. Choose OK.
4. The Archive Folders appears with your archived items (folders and contents).

EXERCISE

In the following exercise, you will retrieve archived items.

1.	From the File menu, choose Open, Personal Folders File (.pst)...	*The Open Personal Folders dialog box appears,*
3.	In the *Open Personal Folders* dialog box, select d:*archive.pst*	
4.	Choose OK	*The Archive Folders appears in the Folder List,*

END

Creating and Applying Categories

Assigning a category to each Outlook item helps you sort and find your data. Outlook supplies a Master Category List that you can use as is, but as your data entries become more task specific, you might find it helpful to add your own categories to the list. Your category designation can be a keyword or a phrase, and you can apply it to related items stored in different folders. For example, you can keep track of all messages, tasks, appointments, and contacts related to a Mardi Gras celebration by assigning a category named Mardi Gras to each of them. You apply categories with the Categories dialog box, shown in Figure 7-6, and create categories with the Master Category List dialog box, shown in Figure 7-7.

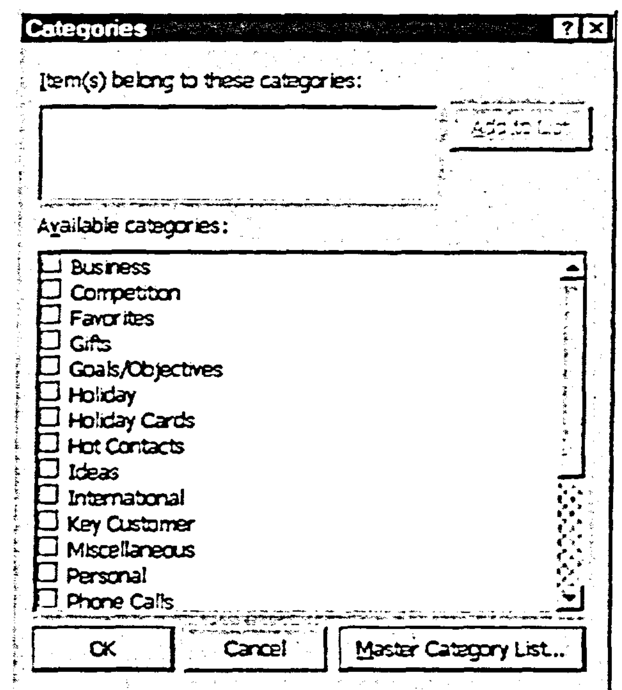


Figure 7-6: *The Categories Dialog Box*

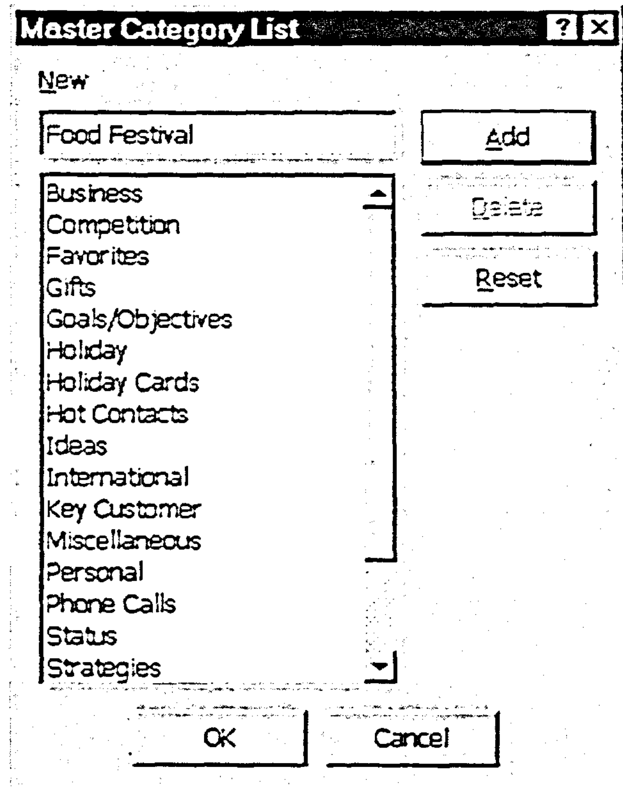


Figure 7-7: *The Master Category List Dialog Box*

METHOD

To create and apply categories:

1. Create or open an appointment, task, or contact.
2. At the bottom of the window, choose Categories.
3. If necessary, in the Categories dialog box, choose Master Category List.
4. In the Master Category List dialog box, in the New text box, type the new category.
5. Choose Add.
6. Repeat steps 4 and 5 as necessary.
7. Choose OK.
8. In the Categories dialog box, select a category.
9. Choose OK.

EXERCISE

In the following exercise, you will create and apply categories.

1.	Open the Contacts folder	*The general contact list appears in the information viewer.*
2.	Open the Association members subfolder	*The Association members contact list appears.*
3.	Select the Felicia Montrachet address card, and then double-click it	*The Contact window opens.*
4.	At the bottom of the window, choose Categories	*The Categories dialog box appears.*
5.	Choose Master Category List	*The Master Category List dialog box appears.*
6.	In the New text box, type **Food Festival**	
7.	Choose Add	*Food Festival appears in the list.*
8.	Choose OK	*The Categories dialog box reappears with Food Festival in the Available categories list.*
9.	Select Food Festival	
10.	Choose OK	*The new category is designated.*
11.	Save and Close the address card	
12.	If the Folder list is displayed, close it	

END

Finding Items

Once you receive and send numerous e-mail messages, list many contacts, and post lots of notes, you might find it difficult to remember where you stored a certain piece of information. For example, you might remember that you ordered a new stock pot, but you might forget from which supplier you placed your order. You use the Find and the Advanced Find windows, shown in Figure 7-8 and Figure 7-10, to locate your items. You can access the Find Pane from the Tools menu or Find button of the Standard toolbar, shown in Figure 7-9. You can access the Advanced Find window from the Tools menu or by right-clicking a folder and choosing Advanced Find from the Shortcut menu. The Find Pane allows you to perform From, Subject and text message searches while the Advanced Find window allows more search criteria.

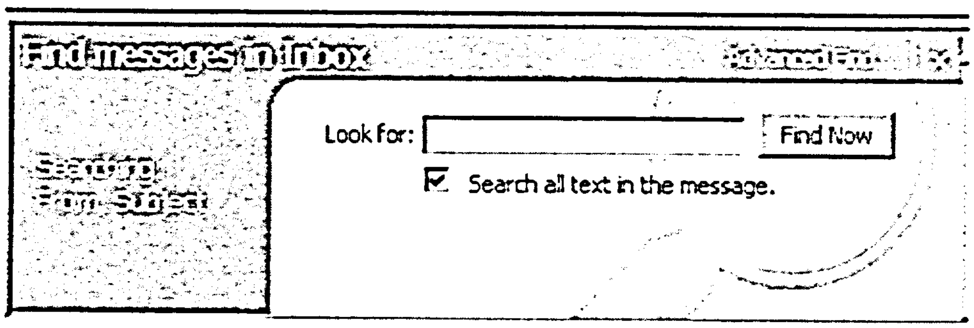


Figure 7-8: *The Find Pane*

Figure 7-9: *The Find Button*

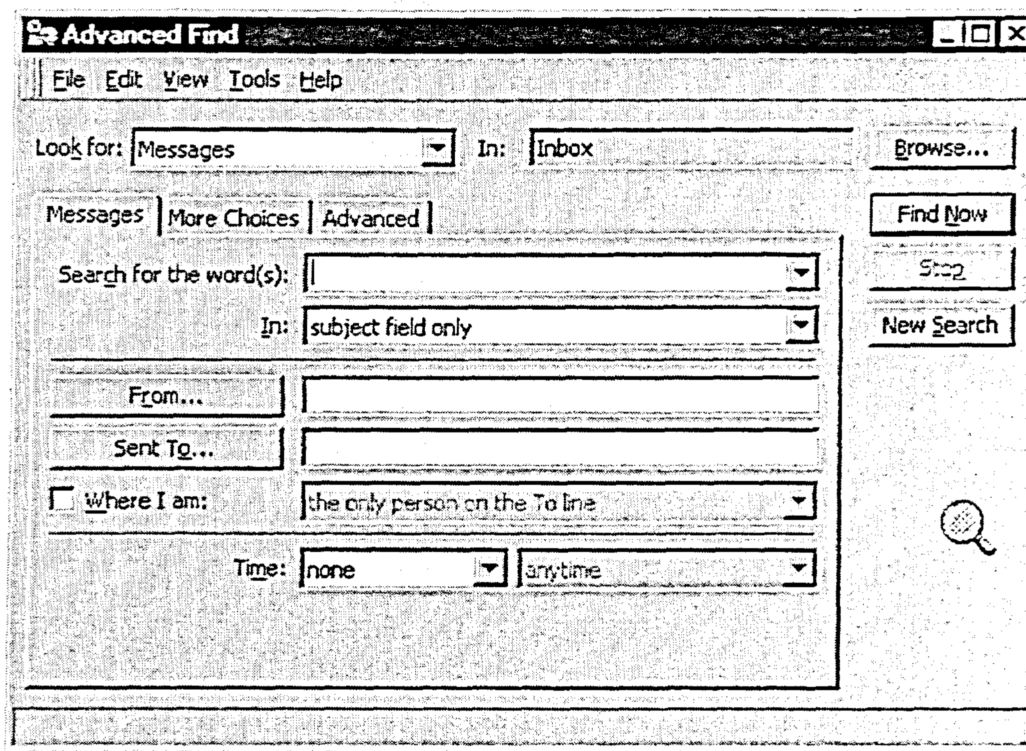


Figure 7-10: *The Advanced Find window*

METHOD

To find items:

1. On the toolbar, click the Find button.
   or
1. From the Tools menu, choose Find.
2. In the Find window, from the Look for field, enter a recipient's name or a keyword(s).
3. If necessary, click the *Search all text in a message* check box.
4. Click Find Now.

To find items from the Advanced Find window.

1. From the Tools menu, choose Advanced Find
   or
1. Right-click a folder and choose Advanced Find
2. From the Look for drop-down list, select an item to search.
3. In the Advanced Find window, in the *Search for the word(s)* combo box, type the word(s) for which you want to search.

4. If necessary, from the In drop-down list, select the message part(s) to search.
5. If desired, in the From text box, type a name.
6. If desired, in the Sent To text box, type a name.
7. If desired, select the More Choices tab.
8. On the More Choices page, if desired, choose Categories to select a category.
9. Choose Find Now.
10. If a folder list appears, double-click the desired folder to view its contents.
11. Close the Find window.

or

11. Choose New Search, and then repeat steps 2 through 11.

EXERCISE

In the following exercise, you will find items using the Advanced Find.

1.	From the Tools menu, choose Advanced Find.	*The Advanced Find window appears displaying context-sensitive information.*
2.	From the Look for drop-down list, select Messages	*The Find window changes to display the Messages information.*
3.	Choose Browse	*The Select Folder(s) dialog box appears.*
4.	Select Sent Items, and then choose OK	*Sent Items appears in the In box.*
5.	In the *Search for the word(s)* combo box, type **rice**	
6.	From the In drop-down list, select *subject field and message body*	
7.	Choose Find Now	*One message appears at the bottom of the window.*
8.	Double-click the message	*The message opens.*
9.	Close the Message window	

10.	From the Look for drop-down list, select Contacts	*A message box that says* ***This will clear your current search*** *appears.*
11.	Choose OK	*The Contacts page appears.*
12.	Select the More Choices tab	*The More Choices page appears.*
13.	Choose Categories	*The Categories dialog box appears.*
14.	Select Food Festival, and then choose OK	
15.	Choose Find Now	*The Felicia Montrachet contact appears at the bottom of the window.*
16.	Double-click the contact	*The Contact window opens.*
17.	Close the Contact window	
18.	Close the Find window	

END

Grouping Items

You can group your messages or other items by any column header when you filter your data using a Current View that displays a list. By grouping the items, you can view a condensed list that shows each entry only once. For example, suppose you regularly send your patrons a brochure advertising the month's specials, you send orders to three provisioners, and you drop your brother and your sister an occasional note. Your full message list displays the name of every patron who receives a brochure, every provisioner from whom you placed orders, and your brother and sister. But if you group your list by subject, then your condensed list shows only three items: brochure, order, and note. If you want to examine all orders, then you expand the order group to view every order.

The easiest way to group your items is by using the Group By Box, which appears below the Folder Banner and above the column headers when you turn on grouping. Figure 7-11 shows the Group By Box. You display the Group By Box by clicking the Group By Box button of the Advanced toolbar, shown in Figure 7-12.

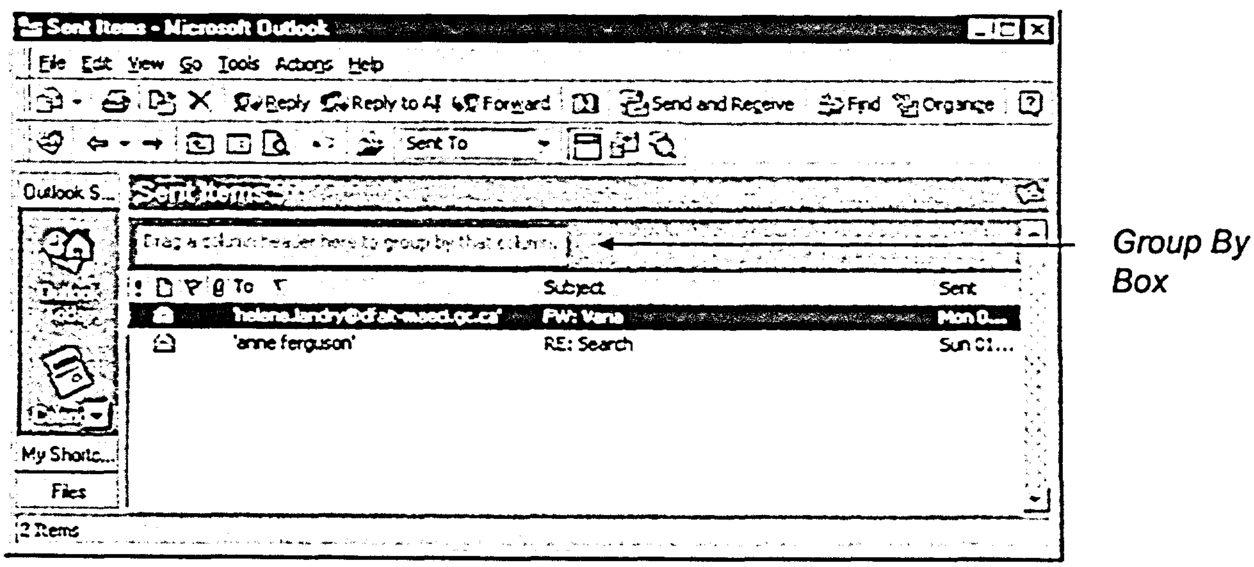


Figure 7-11: *The Group By Box Displayed below the Folder Banner*

Figure 7-12: *The Group By Box Button of the Advanced toolbar*

METHOD

To group items:

1. On the toolbar, click the Group By Box button.
2. Drag the desired column header to the box that says *Drag a column header here to group by that column.*

To turn grouping off:

1. Drag the Group By column header back to its original location.
2. On the toolbar, click the Group By Box button.

EXERCISE

In the following exercise, you will group items and then turn grouping off.

1.	Open the Sent Items folder	
2.	On the Advanced toolbar, click the Group By Box button	*A box that says **Drag a column header here to group by that column.** appears below the Folder Banner and above the column headers.*
3.	Drag the To column header to the box	*Red arrows that indicate where you should place the column header appear. The message list is sorted alphabetically by recipient, and only the recipients' names appear. Each name has a + (plus sign) to its left.*
4.	Click the + to the left of Crawford, Susan (Sue)	*A list of the messages to Susan Crawford appears.*
5.	Drag the To column header back to its original location	*Red arrows that indicate where you should place the column header appear.*
6.	On the Advanced toolbar, click the Group By Box button	*The grouping feature is turned off and the message list returns to its default format.*

END

Creating and Clearing a Filter

Each time you use the Current View drop-down list to change your view, you are applying a filter to your items. When you view your tasks, for example, you can view the simple list that shows every task, the active tasks list that shows only tasks for which you are still responsible, or the completed tasks list.

Suppose you want to view all tasks that are related to your activities for the Greater New Orleans Restaurant Association. You can create a filter of your own to show only those tasks that have the text *Association* or *Assoc.* in the subject field or the message body.

You show or hide items using the Filter dialog box, shown in Figure 7-13. Each Outlook folder has a context-sensitive page in the Filter dialog box, so that each filter's suggested search fields are relevant to the folder in which you set up the filter. If you specify multiple search criteria fields, only the items that meet all criteria appear. If you specify multiple search criteria in only one field, then items that meet any of the criteria within that field appear.

When you want to restore the Current View, you clear the filter.

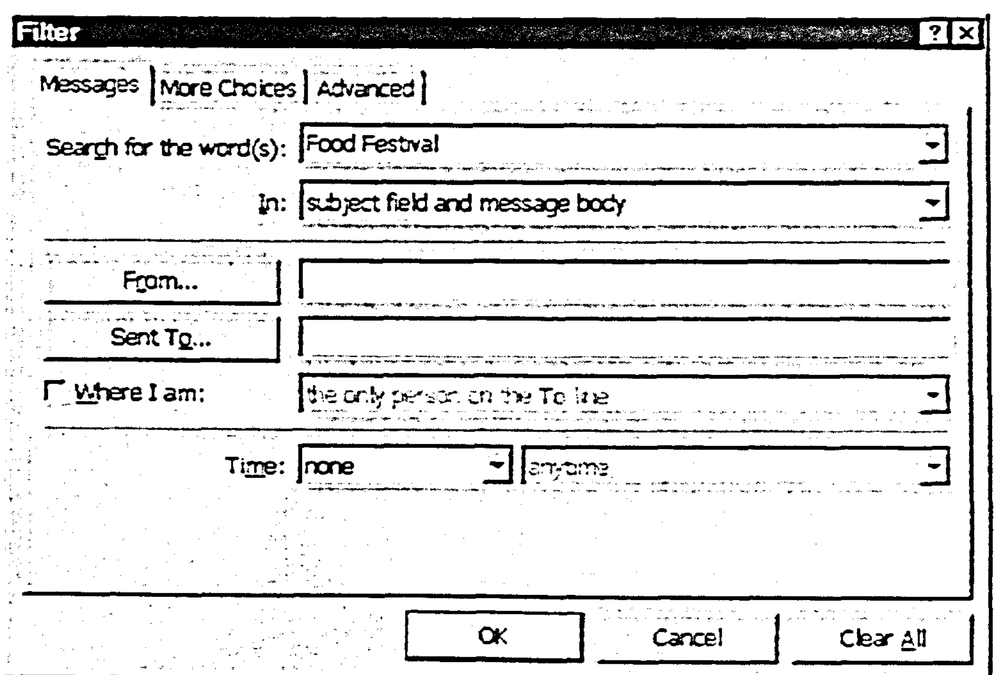


Figure7-13: *The Filter Dialog Box Displaying the Context-Sensitive Messages Page*

METHOD

To create a filter:

1. Select any folder.
2. From the View menu, choose Current View.
3. From the Current View submenu choose Customize Current View.
4. In the View Summary dialog box, click on the Filter button.
5. In the *Search for the word(s):* combo box, enter the search criteria.
6. Choose OK.

To clear a filter:

1. From the View menu, choose Current View.
2. From the Current View submenu choose Customize Current View.
3. In the View Summary dialog box, click on the Filter button.
4. In the Filter dialog box, click on the Clear all button.
5. Click on OK.

EXERCISE

In the following exercise, you will create and clear a filter.

1.	Make sure the Sent Items folder is open	
2.	Right-click the mouse in the Information Viewer and choose Filter	*The Filter dialog box appears.*
3.	On the Messages page, in the *Search for the word(s):* combo box, type **booth**	
4.	From the In: drop-down list, select *subject field and message body*	
5.	Choose OK	*The message list displays the only sent item that contains the specified word.*

6.	Open, read, and close the message	*The word **booth** is in the body of the message.*
7.	Right-click the mouse in the Information Viewer and choose Filter	*The Filter dialog box appears.*
8.	Choose Clear All	*The **Search for the word(s):** combo box becomes blank. The In: list box displays **subject field only***
9.	Choose OK	*All sent items appear in the message list.*

END

Customizing Outlook

Outlook's default settings might not suit your needs. You can reset certain general options as well as options specific to each folder. You can add shortcuts to the Outlook Bar and move them to a convenient location. And you can also change your password to keep up with your security needs.

Setting Options

The Options dialog box has seven pages on which you can set options the way you want them. The Other page, shown in Figure 7-14, lets you make changes that apply throughout Outlook. The remaining pages let you set options for specific Outlook features.

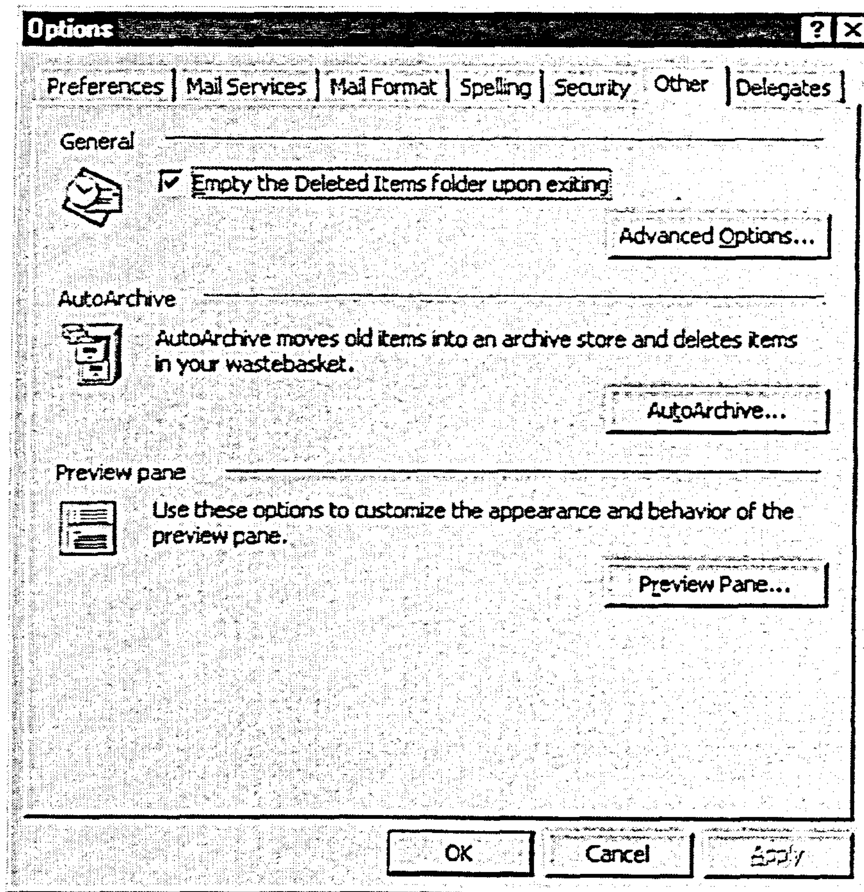


Figure 7-14: *The Other Page of the Options Dialog Box*

METHOD

To set options:

1. From the Tools menu, choose Options.
2. In the Options dialog box, select a tab.
3. On the selected page, select the desired check boxes and option buttons.
4. Select the desired items from the lists.
5. As desired, select additional tabs and repeat steps 3 and 4.
6. Choose OK.

EXERCISE

In the following exercise, you will set options.

1.	From the Tools menu, choose Options	*The Options dialog box appears.*
2.	Select the Other tab	*The Other page appears.*
3.	In the General settings area, select the *Empty the Deleted Items folder upon exiting* check box	
4.	Select the Preference tab and click the Calendar Options button.	*The Calendar Options dialog box appears.*
5.	In the Calendar working hours area, from the Start time drop-down list, select 9:00 AM, and from the End time drop-down list, select 5:00 PM	
6.	Choose OK	
7.	Select the Preference tab and in the Calendar area, set the default reminder time to 10 minutes	
8.	From the Preference page, click the Journal Options button	*The Journal page appears.*

9.	In the For these contacts area, select Charles Simon and Clio Hebert	
10.	Choose OK	*The new options are set.*
11.	Exit from Outlook	*A message box that asks,* ***Are you sure you want to permanently delete all the items and subfolders in the "Deleted Items" folder?*** *appears.*
12.	Choose Yes	
13.	Open Outlook	*Outlook opens in the Calendar folder. The workday starts at 9:00 A.M. and ends at 5:00 P.M.*

END

Adding Shortcuts to the Outlook Bar

Once you create new subfolders, you can display shortcuts to them on the Outlook Bar. Adding shortcuts gives you easy access to your new folders.

METHOD

To add shortcuts to the Outlook Bar:

1. Right-click the Outlook Bar.
2. From the shortcut menu, choose Outlook Bar Shorcut.
3. In the Add to Outlook Bar dialog box, in the Folder list, select the desired folder.
4. Choose OK.

EXERCISE

In the following exercise, you will add shortcuts to the Outlook Bar.

1.	Right-click the Outlook Bar	*The shortcut menu appears.*
2.	Choose Outlook Bar Shortcut	*The Add to Outlook Bar dialog box appears.*
3.	In the OUTLOOK EXERCISES mailbox, expand the Contacts folder, and then select Association members	
4.	Choose OK	
5.	Scroll to the end of the Outlook Bar	*The shortcut to the Association members contact list appears at the bottom of the Outlook Bar.*
6.	Right-click the Outlook Bar	*The shortcut menu appears.*
7.	Choose Outlook Bar Shortcut	*The Add to Outlook Bar dialog box appears.*
8.	In the Contacts folder list, select Friends and Family	

9.	Choose OK	*The shortcut to the Friends and Family contact list appears below the Association members shortcut on the Outlook Bar.*
10.	Click the Association members shortcut	*The Association members contact list appears.*
11.	Click the Friends and Family shortcut	*The Friends and Family contact list appears.*

END

Moving a Shortcut on the Outlook Bar

You can rearrange the shortcuts so that the ones you use most frequently are at the top of the shortcut list and appear when you open Outlook or you click one of the group buttons on the Outlook Bar.

METHOD

To move a shortcut on the Outlook Bar:

1. Drag the shortcut to the desired position between other shortcuts (or between the top or the bottom edge of the Outlook Bar and the end shortcut).

EXERCISE

In the following exercise, you will move a shortcut on the Outlook Bar.

1. Drag the Association members shortcut to the bottom of the Outlook Bar

   A black horizontal line with arrowheads at its ends appears at each spot where you can position the shortcut.

2. Drag the Association members shortcut to the position below the Contacts shortcut

3. Drag the Friends and Family shortcut to the position below the Association members shortcut

END

Removing a Shortcut from the Outlook Bar

When you no longer need a shortcut you added to the Outlook Bar, you can easily remove it.

METHOD

To remove a shortcut from the Outlook Bar:

1. Right-click the shortcut you want to remove.
2. From the shortcut menu, choose Remove from Outlook Bar.
3. In the *Are you sure you want to remove this folder shortcut?* message box, choose Yes.

EXERCISE

In the following exercise, you will remove a shortcut from the Outlook Bar.

1.	Right-click the Friends and Family shortcut	*The shortcut menu appears.*
2.	Choose Remove from Outlook Bar	*The message box that asks* ***Are you sure you want to remove this folder shortcut?*** *Appears.*
3.	Choose Yes	*The Friends and Family shortcut is removed from the Outlook Bar.*

END

Organizing Messages

When your messages arrive, Outlook stores them in the Inbox. As messages accumulate, your Inbox can become a confusing jumble. You can manage your messages by storing them in folders you create and by defining rules and color-coding for specific types of messages. If you don't need a message once you read it, you can delete it, which saves space on your hard drive and removes clutter from your Inbox.

Displaying and Hiding the Organize Pane

On the Standard toolbar, clicking the Organize button splits the information viewer so that the Ways to Organize Inbox pane, or Organize pane, appears in the top pane and the message list moves to the bottom pane. You can use the Organize pane, shown in Figure 7-15, to create a folder, to move a message, to define a rule, and to color-code messages. The Organize button is a toggle switch. You click it to open the Organize pane and click the button again to close the pane. You can also use the menus and toolbar buttons for most organizing functions.

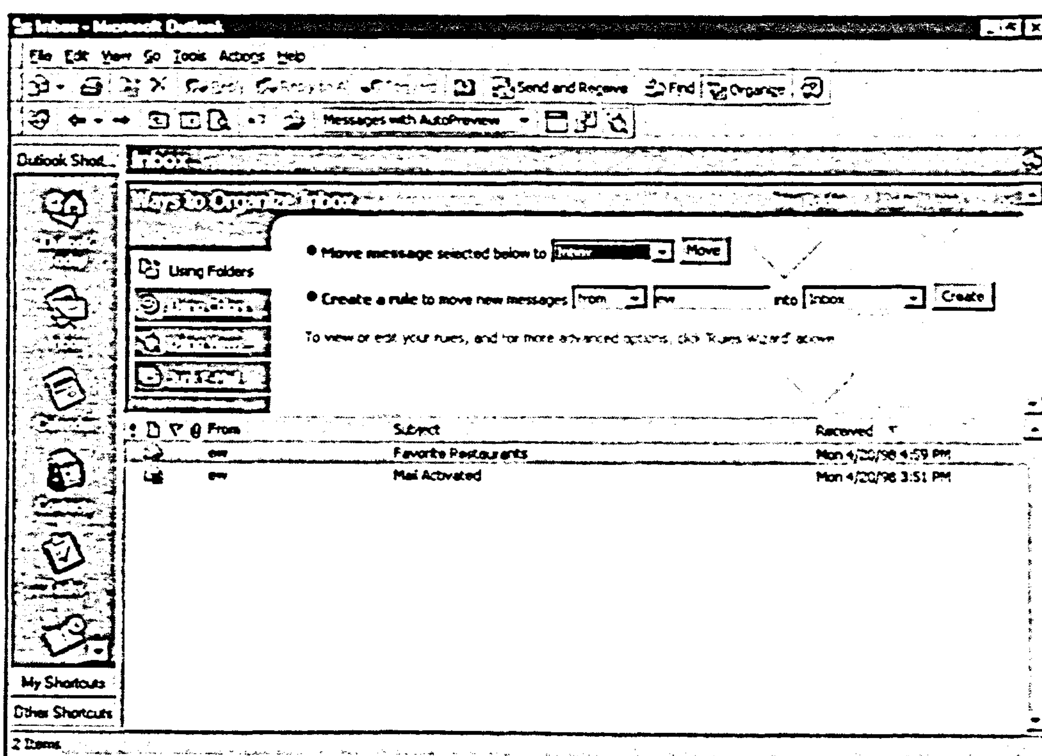


Figure 7-15: The Organize pane in the Information Viewer

METHOD

To display or hide the Organize pane

1. In any folder, on the Standard toolbar, click the Organize button.

To create a folder using the Organize pane

1. In any mail folder, display the Organize pane.
2. In the Organize pane, choose New Folder.
3. In the Create New Folder dialog box, in the Name text box, type the name for the new folder.
4. Choose OK.
5. If a message box asking if you want to add the shortcut to your Outlook Bar appears, choose Yes or choose No.

To move a message to a folder using the Organize pane

1. In any mail folder, from the message list, select the message to move.
2. Display the Organize pane.
3. In the Organize pane, if necessary, in the *Move message selected below* bulleted item, from the drop-down list, select a folder.
4. If necessary, in the Select Folder dialog box, select a folder and then choose OK.
5. Choose Move.

Color-Coding Messages

You can have Outlook color-code messages you receive from or send to a specific correspondent so that you can immediately identify messages that meet your criteria. For example, you might color-code all messages from a supplier blue and all messages to a client red. Color-coding affects the relevant messages in the folder in which you are working when you create the rule and all relevant messages that are subsequently moved into or received in that folder; if you want to color-code messages in other folders, you must define the color-coding in each folder. If you change your mind about a color you are using after you set up color-coding, you can color-code the relevant messages again so that they appear in another color or in black. You color-code messages in the Organize pane on the Using Colors page, shown in Figure 7-16.

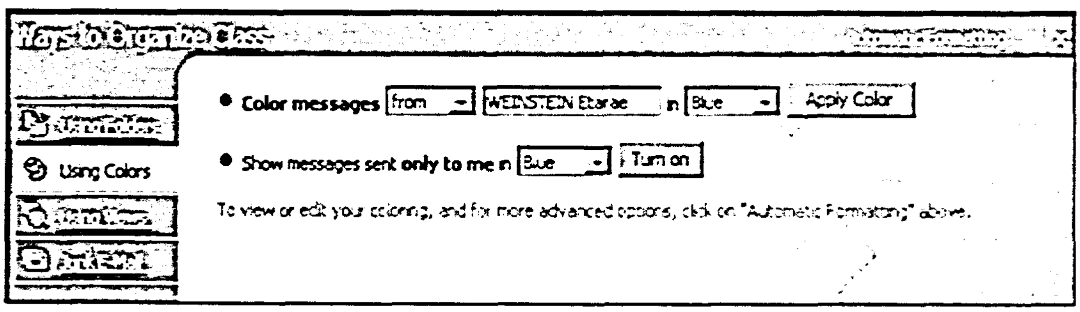


Figure 7-16: The Using Colors Page of the Organize pane

METHOD

To color-code messages

1. In any mail folder, from the message list, select a message to or from someone whose messages you want to color-code.
2. Display the Organize pane.
3. In the Organize pane, click the underlined text *Using Colors*.
4. If necessary, in the *Color messages* bulleted item, from the first drop-down list, select an option.
5. If necessary, in the text box, select the name or type the appropriate user name.
6. If necessary, from the second drop-down list, select a color.
7. Choose Apply Color.

Using a Rule

Rules let you manage incoming and outgoing messages by allowing you to define actions that apply to certain messages. You use the Organize pane to create a simple rule and the Rules wizard to create a detailed rule to automatically move, delete, forward, or flag specific types of messages. For example, you might create a rule to notify you whenever messages from your advertising manager arrive in your Inbox. If you decide you no longer want a rule once you create it, you can delete it. Figure 7-17 shows the initial Rules Wizard dialog box.

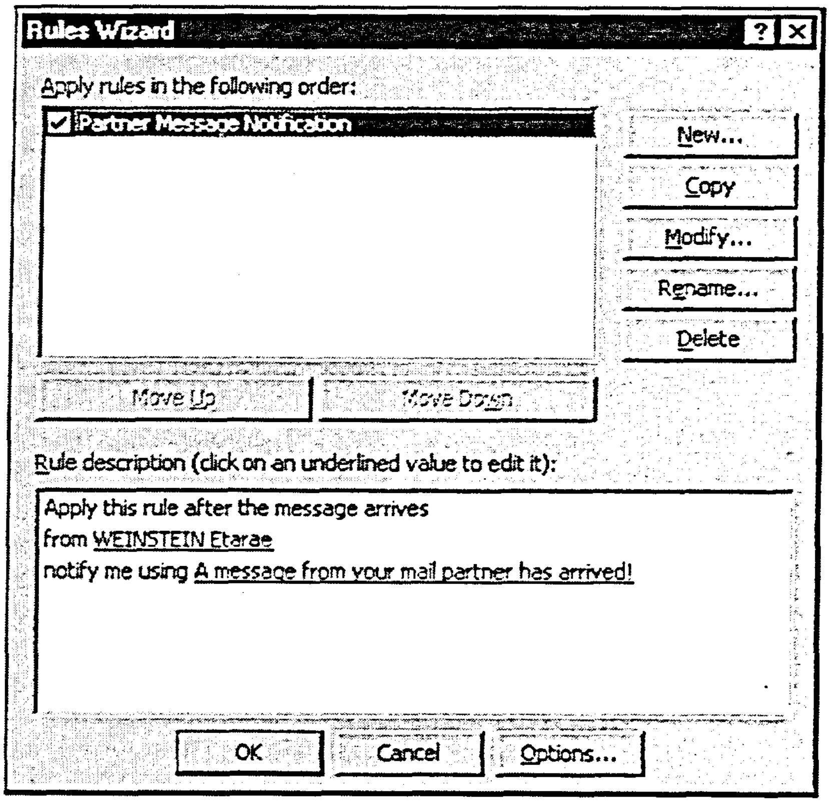


Figure 7-17: The Rules Wizard Dialog Box with One Rule

METHOD

To create a simple rule

1. In any mail folder, from the message list, select a message to or from someone for whose messages the rule will apply.
2. Display the Organize pane.
3. If necessary, in the Organize pane, in the *Create a rule to move new messages* bulleted item, from the drop-down list, select an option.
4. If necessary, in the text box, select the name and then type the user name.
5. If necessary, from the into drop-down list, select a folder.
6. Choose Create.

To create a detailed rule

1. In any mail folder, from the Tools menu, choose Rules Wizard.
   or
1. In any mail folder, display the Organize pane, and then, in the Organize pane, choose Rules Wizard.
2. In the Rules Wizard dialog box, choose New.
3. On the Rules Wizard page, from the *Which type of rule do you want to create* list, select a type.
4. Choose Next.
5. If necessary, in the next Rules Wizard page, in the *Which condition(s) do you want to check* list, deselect and/or select appropriate check box(es).
6. If necessary, in the *Rule description* text box, click an underlined value to replace it with your limiter.
7. If a dialog box appears, provide the requested information, and then choose OK.
8. Choose Next.
9. If necessary, on the next Rules Wizard page, in the *What do you want to do with the message* list, deselect and/or select the appropriate check box(es).
10. If necessary, in the *Rule description* text box, click an underlined value to replace it with your limiter.
11. If a dialog box appears, provide the requested information, and then choose OK.
12. Choose Next.

13. As necessary, on the next Rules Wizard page, in the *Add any exceptions (if necessary)* area, deselect and/or select appropriate check box(es).
14. Choose Next.
15. On the next Rules Wizard page, in the *Please specify a name for this rule* text box, type a name.
16. If desired, select or deselect the *Turn on this rule* check box.
17. Choose Finish.
18. In the Rules Wizard dialog box, to create another rule, choose New, and then repeat steps 3 through 17.
    or
18. In the Rules Wizard dialog box, choose OK.

To delete a rule

1. If necessary, in any mail folder, from the Tools menu, choose Rules Wizard.
   or
1. In any mail folder, display the Organize pane, and then, in the Organize pane, choose Rules Wizard.
2. In the Rules Wizard dialog box, in the rules list, select a rule.
3. Choose Delete.
4. In the message box, choose Yes.
5. In the Rules Wizard dialog box, choose OK.

Section 7 *Summary*

To open an Outlook folder in Outlook Today:

1. On the Outlook Today page, point to a folder shortcut or a folder name.
2. When the pointer becomes a hand and, if appropriate, the folder name is underlined, click the shortcut or name.

To open a calendar item in Outlook Today:

1. On the Outlook Today page, point to the calendar item.
2. When the pointer becomes a hand and the item is underlined, click the item.

To complete a task in Outlook Today:

1. Click the check box to the left of the task.

To find a contact in Outlook Today:

1. In the Find a Contact text box, type the contact name.
2. To the right of the text box, point to the word *go*.
3. When the pointer becomes a hand and the word *go* is underlined, click the word.
4. If necessary, in the Advanced Find window, double-click the found contact record.
   or
4. If necessary, in the Check Names dialog box, select the desired contact from the list and then choose Properties.
5. As desired, close the dialog box(es).

To set Outlook Today options:

1. On the Outlook Today page, at the top of the page, point to the word *Options*.
2. When the pointer becomes a hand and the word *Options* is underlined, click the word.
3. As appropriate, on the Outlook Today Options page, define the desired options.
4. At the top of the page, point to the words *Back to Outlook Today*.
5. When the pointer becomes a hand and the words are underlined, click the words.

To set up AutoArchiving:

1. From the Tools menu, choose Options.
2. In the Options dialog box, select the Other tab.
3. On the Other page, click the *AutoArchive* button.
4. In the *AutoArchive every...day(s) at startup* spin box, enter the number of days.
5. Choose OK and close the Options dialog box.
6. On the Outlook Bar, right-click an Outlook shortcut.
7. In the shortcut menu, choose Properties.
8. In the Properties dialog box, select the AutoArchive tab.
9. On the AutoArchive page, if necessary, select the *Clean out items older than* check box.
10. In the *Clean out items older than* spin box, enter the number of units, and from the drop-down list, select the calendar period.

11. If necessary, choose Browse, and in the Find Personal Folders dialog box, select the drive and path for the archive file.
12. Choose OK.

To archive manually:

1. From the File menu, choose Archive.
2. In the Archive dialog box, select the *Archive this folder and all subfolders:* option button.
3. In the folder list, select a folder.
4. From the *Archive items older than:* drop-down Date Navigator, select a date.
5. Choose OK.

To retrieve archived items:

1. From the File menu, choose Open, Personal Folders File (.pst).
2. Select D:\archive.pst.
3. Choose OK.
4. The Archive Folders appears with your archived items (folders and contents).

To create and apply categories:

1. Create or open an appointment, task, or contact.
2. At the bottom of the window, choose Categories.
3. If necessary, in the Categories dialog box, choose Master Category List.
4. In the Master Category List dialog box, in the New text box, type the new category.
5. Choose Add.
6. Repeat steps 4 and 5 as necessary.
7. Choose OK.
8. In the Categories dialog box, select a category.
9. Choose OK.

To find items:

1. On the toolbar, click the Find button.

or

1. From the Tools menu, choose Find.
2. In the Find window, from the Look for field, enter a recipient's name or a keyword(s).
3. If necessary, click the *Search all text in a message* check box.
4. Click Find Now.

To use the Advanced Find.

1. From the Tools menu, choose Advanced Find

or

1. Right-click a folder and choose Advanced Find
2. From the Look for drop-down list, select an item to search.
3. In the Advanced Find window, in the *Search for the word(s)* combo box, type the word(s) for which you want to search.
4. If necessary, from the In drop-down list, select the message part(s) to search.
5. If desired, in the From text box, type a name.
6. If desired, in the Sent To text box, type a name.
7. If desired, select the More Choices tab.
8. On the More Choices page, if desired, choose Categories to select a category.
9. Choose Find Now.
10. If a folder list appears, double-click the desired folder to view its contents.
11. Close the Find window.

or

11. Choose New Search, and then repeat steps 2 through 11.

To group items:

1. On the toolbar, click the Group By Box button.
2. Drag the desired column header to the box that says *Drag a column header here to group by that column.*

To turn grouping off:

1. Drag the Group By column header back to its original location.
2. On the toolbar, click the Group By Box button.

To create a filter:

1. Select any folder.
2. Right click the mouse in the Information Viewer.
3. Select Filter.
4. In the *Search for the word(s):* combo box, enter the search criteria.
5. Choose OK.

To clear a filter:

1. Right-click the Information Viewer.
2. Select Filter.
3. In the Filter dialog box, choose Clear all.

To set options:

1. From the Tools menu, choose Options.
2. In the Options dialog box, select a tab.
3. On the selected page, select the desired check boxes and option buttons.
4. Select the desired items from lists.
5. As desired, select additional tabs and repeat steps 2 through 4.
6. Choose OK.

To add shortcuts to the Outlook Bar:

1. Right-click the Outlook Bar.
2. From the shortcut menu, choose Outlook Bar Shorcut.
3. In the Add to Outlook Bar dialog box, in the Folder list, select the desired folder.
4. Choose OK.

To move a shortcut on the Outlook Bar:

1. Drag the shortcut to the desired position between other shortcuts (or between the top or the bottom edge of the Outlook Bar and the end shortcut).

To remove a shortcut from the Outlook Bar:

1. Right-click the shortcut you want to remove.
2. From the shortcut menu, choose Remove from Outlook Bar.
3. In the *Are you sure you want to remove this folder shortcut?* message box, choose Yes.

To create a folder using the Organize pane:

1. In any mail folder, display the Organize pane.
2. In the Organize pane, choose New Folder.
3. In the Create New Folder dialog box, in the Name text box, type the name for the new subfolder.
4. Choose OK.
5. If a message box asking if you want to add the shortcut to your Outlook Bar appears, choose Yes or choose No.

To move a message to a folder using the Organize pane:

1. In any mail folder, from the message list, select the message to move.
2. Display the Organize pane.
3. In the Organize pane, if necessary, in the *Move message selected below* bulleted item, from the drop-down list, select a folder.
4. If necessary, in the Select Folder dialog box, select a folder and then choose OK.
5. Choose Move.

To color-code messages:

1. In any mail folder, from the message list, select a message to or from someone whose messages you want to color-code.
2. Display the Organize pane.
3. In the Organize pane, click the underlined text *Using Colors.*
4. If necessary, in the *Color messages* bulleted item, from the first drop-down list, select an option.
5. If necessary, in the text box, select the name and then type the appropriate user name.
6. If necessary, from the second drop-down list, select a color.
7. Choose Apply Color.

To create a simple rule:

1. In any mail folder, from the message list, select a message to or from someone for whose messages the rule will apply.
2. Display the Organize pane.
3. If necessary, in the Organize pane, in the *Create a rule to move new messages* bulleted item, from the drop-down list, select an option.
4. If necessary, in the text box, select the name and then type the user name.
5. If necessary, from the into drop-down list, select a folder.
6. Choose Create.

To create a detailed rule:

1. In any mail folder, from the Tools menu, choose Rules Wizard.
   or
1. In any mail folder, display the Organize pane, and then, in the Organize pane, choose Rules Wizard.
2. In the Rules Wizard dialog box, choose New.
3. On the Rules Wizard page, from the *Which type of rule do you want to create* list, select a type.
4. Choose Next.
5. If necessary, in the next Rules Wizard page, in the *Which condition(s) do you want to check* list, deselect and/or select appropriate check box(es).
6. If necessary, in the *Rule description* text box, click an underlined value to replace it with your limiter.
7. If necessary, in the *[limiter]* dialog box, provide the requested information, and then choose OK.
8. Choose Next.

9. If necessary, on the next Rules Wizard page, in the *What do you want to do with the message* list, deselect and/or select the appropriate check box(es).
10. If necessary, in the *Rule description* text box, click an underlined value to replace it with your limiter.
11. If necessary, in the *[limiter]* dialog box, provide the requested information, and then choose OK.
12. Choose Next.
13. As necessary, on the next Rules Wizard page, in the *Add any exceptions (if necessary)* area, deselect and/or select appropriate check box(es).
14. Choose Next.
15. On the next Rules Wizard page, in the *Please specify a name for this rule* text box, type a name.
16. If desired, select or deselect the *Turn on this rule* check box.
17. Choose Finish.
18. In the Rules Wizard dialog box, to create another rule, choose New, and then repeat steps 3 through 17.

    or

18. In the Rules Wizard dialog box, choose OK.

To delete a rule:

1. If necessary, in any mail folder, from the Tools menu, choose Rules Wizard.

or

1. In any mail folder, display the Organize pane, and then, in the Organize pane, choose Rules Wizard.
2. In the Rules Wizard dialog box, in the rules list, select a rule.
3. Choose Delete.
4. In the message box, choose Yes.
5. In the Rules Wizard dialog box, choose OK.

Section 7 *Self-Check Exercise*

1. Set Outlook to AutoArchive every 14 days. Set the Journal aging period to six months. Archive all items in your Calendar that are more than one month old. Then retrieve your archived items.

2. Create a category called **Wholesalers** and apply it to the contact Jeff Thompson.

3. Find, open, read, and then close the sent **Invoice** message and the sent message that mentions Mardi Gras.

4. Group your tasks by due date. Display all tasks with no due date. Then ungroup your tasks.

5. Create a filter to view only those tasks that have Food Festival in the subject or notes fields. Then clear the filter.

6. Reset your options so that Outlook no longer empties the Deleted Items folder upon exiting. Set Outlook to start up in the Inbox. Set the Calendar to show your work day starting at 8:30 AM and ending at 5:30 PM. Set the Appointment Reminder default to 15 minutes.

7. On the Outlook Bar, create a new shortcut to your Inbox Business folder and move the shortcut to just below the Inbox shortcut.

8. Delete the Association members shortcut and the Business shortcut from the Outlook Bar.

9. Exit Outlook.

Section 8

Optimizing Mail Functions

- Using Address Books
- Working with Personal Distribution Lists
- Using Message Features

Each name in bold in an address book indicates a *group address,* a unique name that references a group of Outlook users. When you address mail to a group, each individual in the group receives the message. If group names appear in the Postoffice Address List, these names have been created by your system administrator. You can use the group addresses, but you cannot change who is in the group.

Several buttons in the Select Names dialog box help you use your address books more effectively. Table 8-1 describes these buttons.

Button	Function
New	Click to enter a new name and address for a recipient. You can also add the names you create to your Personal Address Book.
Properties	Select a name in the left or the right pane, and then click this button to display information about that recipient.
Find	Click to search one or more address books for names.
Send Options	Specify options for sending a message to the selected name. The options vary based on the selected address book.

Table 8-1: *Buttons in the Select Names Dialog Box*

Adding a Name to Your Personal Address Book

If you frequently send e-mail to the same people, you can add them to your Personal Address Book. You can easily add names and their associated addresses from other address books, or you can add a name and address for someone to whom you regularly send e-mail on the Internet. If you want to add more information about people to whom you send e-mail frequently, you might prefer to list them in your contact list, but if you only want to keep track of a name and address, it is simpler to list them in your Personal Address Book.

You add names to your Personal Address Book with the Select Names dialog box. You can also add the names without opening a new message by using the Address Book window, shown in Figure 8-2. You open this window by clicking the Address Book button on the Standard toolbar.

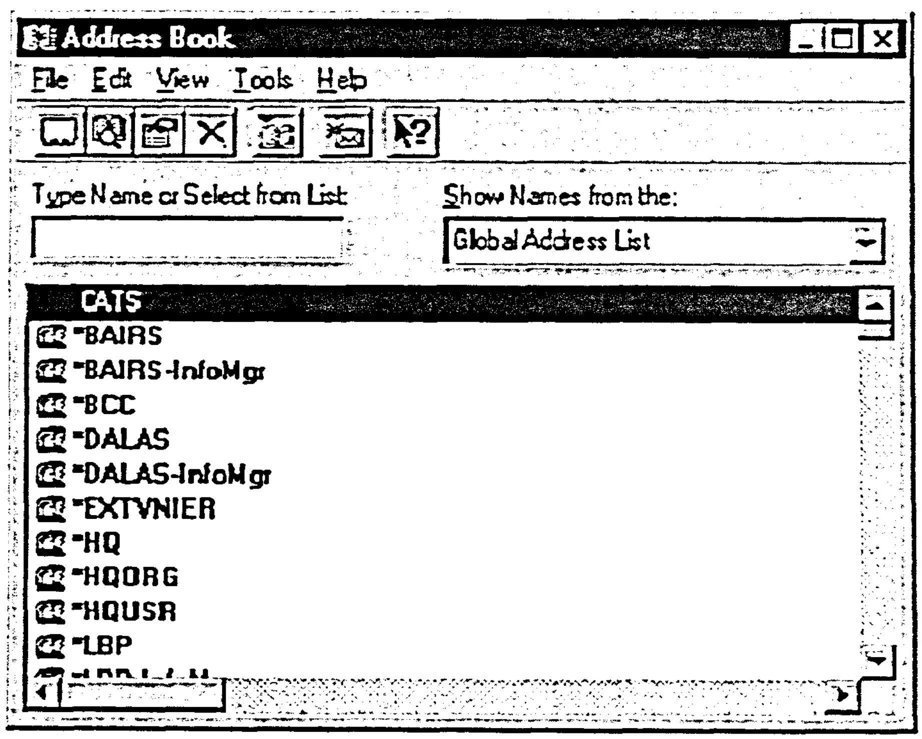


Figure 8-2: *The Address Book Window*

The Address Book window toolbar buttons, described in Table 8-2, let you perform your address book management tasks quickly and easily.

Button	Name	Function
	New Entry	Displays the New Entry dialog box for entering new user names.
	Find Items	Displays the Find dialog box, which helps you locate names.
	Properties	Displays the Properties dialog box, which gives you information about the user address and lets you add information about the user.
	Delete	Deletes the selected user name from your Personal Address Book.
	Add to Personal Address Book	Adds the selected user name to your Personal Address Book.
	New Message	Opens a new message window.
	Help	Accesses help on Outlook functions, menu commands, dialog boxes, and parts of the window.

Table 8-2: *Address Book Window Toolbar Buttons*

When adding a new name to your Personal Address Book, use the New Entry dialog box, shown in Figure 8-3, to select the type of entry, such as Microsoft Mail Address or Internet Address.

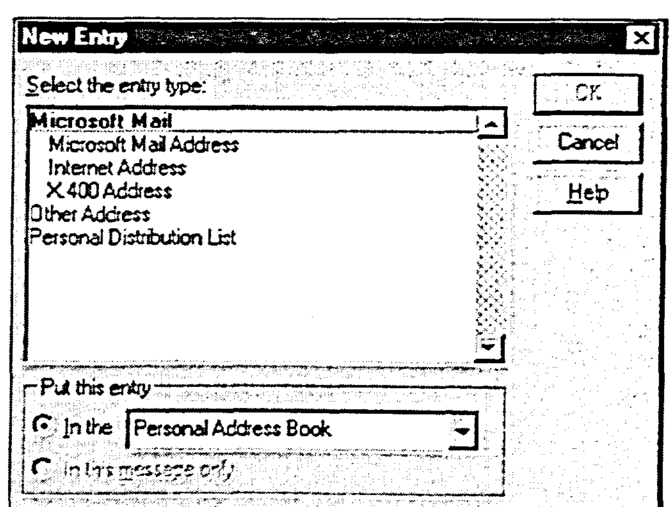


Figure 8-3: *The New Entry Dialog Box*

METHOD

To add a name to your Personal Address Book:

Inbox method

1. On the Standard toolbar, click the Address Book button.
2. If necessary, in the Address Book window, from the *Show Names from the:* drop-down list, select the address book from which you want to add a name.
3. From the address list, select the name(s) you want to add to your Personal Address Book.
4. On the Address Book window toolbar, click the Add to Personal Address Book button.
5. Close the Address Book window.

New message method

1. On the New message toolbar, click the Address Book button.
2. If necessary, in the Select Names dialog box, from the *Show Names from the:* drop-down list, select the address book from which you want to add a name.
3. From the address list, select the name(s) you want to add to your Personal Address Book.
4. Choose Properties.
5. In the Properties dialog box, choose Personal Address Book.
6. Choose OK.
7. Close the Address Book window.

EXERCISE

In the following exercise, you will add names from another address book to your Personal Address Book.

1.	On the Standard toolbar, click the Address Book button	*The Address Book window appears.*
2.	Select an address book from the *Show Names from the:* drop-down list	
3.	From the address list, select your partner's name	

4.	On the Address Book window toolbar, click the Add to Personal Address Book button	*The name is added to your Personal Address Book.*
5.	Press and hold **CTRL**, select all remaining students, and then release **CTRL**	
6.	On the address Book window toolbar, click the Add to Personal Address Book button	*The names are added to your Personal Address Book.*

END

Creating an Alias in Your Personal Address Book

When you want to add a name and its associated address to your Personal Address Book and that name and address are not listed in any of your postoffice address lists or in your contact list, you create an alias to represent that name and address. Choose a name that you can remember easily that is nonetheless distinctive from the other names in your address books. When you click the New Entry button on the Address Book window toolbar, the New Entry dialog box appears and lets you choose the entry type: Microsoft Mail Address, Internet Address, or X400 Address. You enter the alias in a New Address Properties dialog box, such as the one shown in Figure 8-4 for an Internet address.

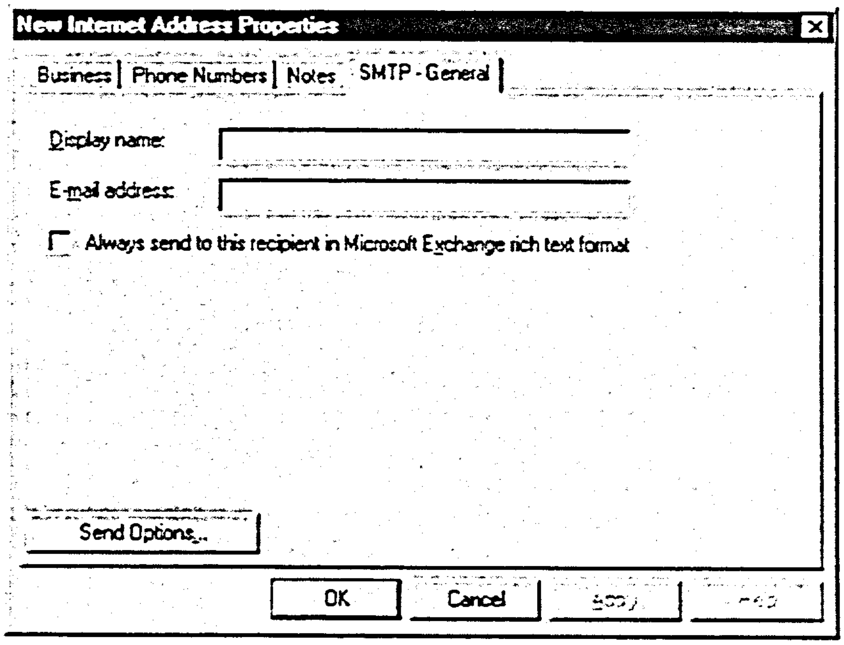


Figure 8-4: *The New Internet Address Properties Dialog Box*

METHOD

To create an alias in your Personal Address Book:

1. On the Standard toolbar, click the Address Book button.
2. On the Address Book window toolbar, click the New Entry button.
3. In the New Entry dialog box, select the entry type.
4. Choose OK.
5. On the STMP-General page of the New Address Properties dialog box, in the Display Name text box, type the name you want to use to represent this address.

6. In the E-Mail Address text box, type the e-mail address.
7. Choose OK.

Note: In network setups, you can only add addresses to your Personal Address Book. The system administrator adds names to the other address books.

EXERCISE

In the following exercise, you will create an alias in your Personal Address Book.

1.	Make sure the Address Book window is still open	
2.	On the Address Book window toolbar, click the New Entry button	*The New Entry dialog box appears.*
3.	Select Internet Address	
4.	Choose OK	*The New Address Properties dialog box for the entry appears.*
5.	On the SMTP-General page of the New Internet Address Properties dialog box, type a name in the Display Name field	
6.	Type the Internet e-mail address in the E-Mail Address field	
7.	Choose OK	*The New Address Properties dialog box is closed and the new name is added to your Personal Address Book.*
8.	From the *Show Names from the:* drop-down list, select Personal Address Book	*The names you just selected appear in the name list.*
9.	Close the *Address Book window*	

END

Selecting a Default Address Book

You might be a member of a large network that has many smaller networks, each of which has its own address book. You can select the default address book to display by using the Addressing page of the Services dialog box, shown in Figure 8-5. In addition, if you find that you primarily send messages to people listed in a certain address book, you can change the order in which Outlook searches the address books for addresses so that Outlook checks your most used address book first.

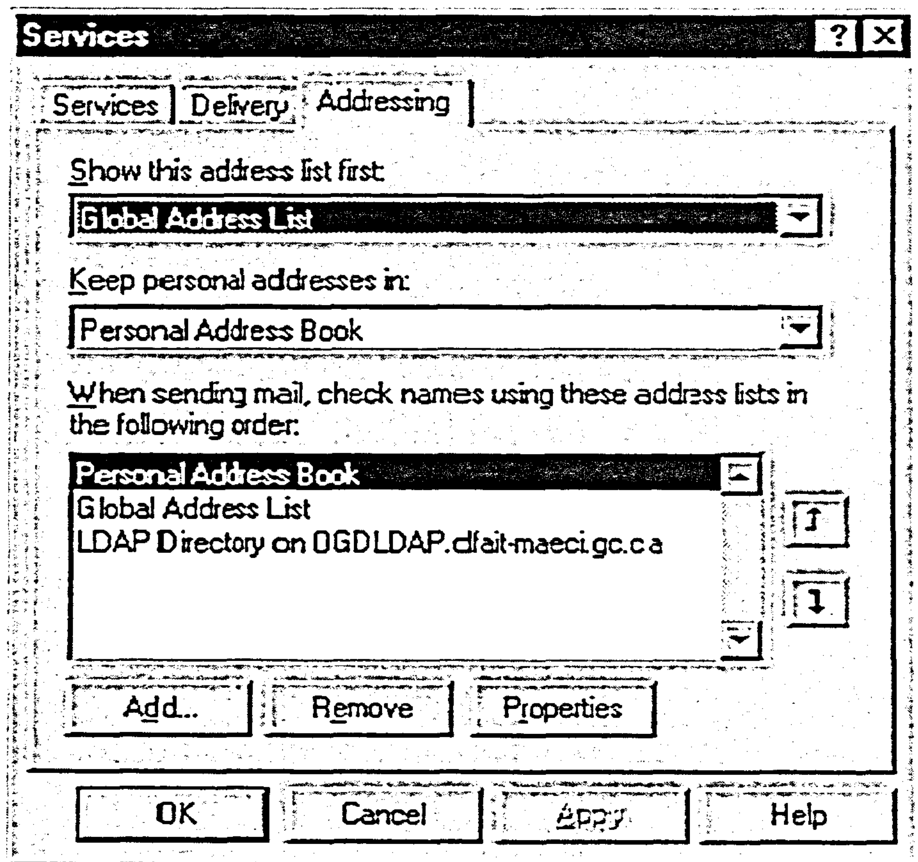


Figure 8-5: *The Addressing Page of the Services Dialog Box*

METHOD

To select a default address book:

1. From the Tools menu, choose Services.
2. In the Services dialog box, select the Addressing tab.
3. On the Addressing page, from the *Show this address list first:* drop-down list, select the desired address book.

4. If desired, from the *When sending mail, check names using these address lists in the following order:* list, select an address book, and then choose the up or the down arrow to change the priority order.
5. Choose OK.
6. Exit from and restart Outlook.

EXERCISE

In the following exercise, you will select your Personal Address Book as your default address book.

1.	From the Tools menu, choose Services	*The Services dialog box appears.*
2.	Select the Addressing tab	*The Addressing page of the Services dialog box appears.*
3.	From the *Show this address list first:* drop-down list, select Personal Address Book	
4.	Choose OK	*Your default address book is selected.*
5.	Exit from and restart Outlook	*Your Personal Address Book is now the default address book.*
6.	On the Standard toolbar, click the Address Book button	*The Address Book window appears. The* ***Show Names from the:*** *drop-down list displays Personal Address Book.*

END

Working with Personal Distribution Lists

In addition to the group addresses created by your postoffice administrator, you can create your own personal distribution lists. For example, if you often send messages to members of a project team or committee, you might want to create a group to save you time and trouble. Once you've created a personal distribution list, you can use it just as you use any other name to address a message. It is easy to add and delete members.

Creating a Personal Distribution List

You create a new personal distribution list similarly to creating and adding names to a Personal Address Book. The New Entry dialog box gives you access to the New Personal Distribution List Properties dialog box, shown in Figure 8-6. From here, you add members to your list.

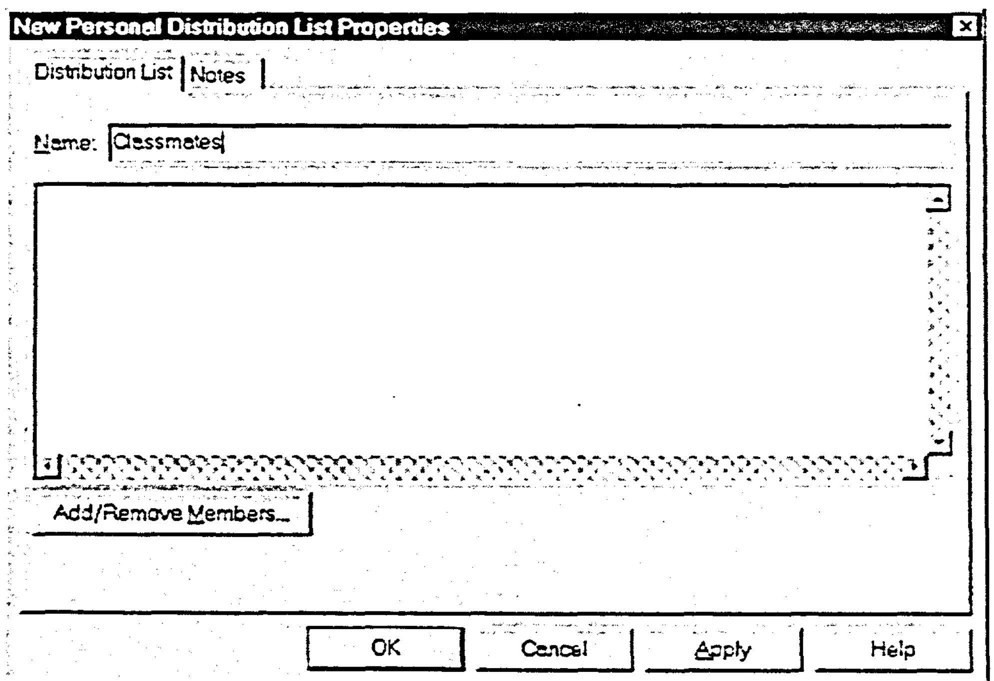


Figure 8-6: *The New Personal Distribution List Properties Dialog Box*

METHOD

To create a personal distribution list:

1. On the Standard toolbar, click the Address Book button.
2. On the Address Book window toolbar, click the New Entry button.
3. In the New Entry dialog box, from the Select entry type list, select Personal Distribution List, and then choose OK.
4. In the New Personal Distribution List Properties dialog box, in the Name text box, type a name for your personal distribution list.
5. Choose Add/Remove Members.
6. Select the names.
7. Choose Members.
8. Choose OK.
9. In the New Personal Distribution List Properties dialog box, choose OK.
10. Close the Address Book window.

EXERCISE

In the following exercise, you will create a personal distribution list.

1.	Make sure the Address Book window is open	
2.	On the Address Book window toolbar, click the New Entry button.	*The New Entry dialog box appears.*
3.	From the *Select the entry type:* list, select Personal Distribution List, and then choose OK	*The New Personal Distribution List Properties dialog box appears.*
4.	In the Name text box, type **Classmates**	
5.	Choose Add/Remove Members	*The Edit Members of Classmates dialog box appears.*

6.	Press and hold **CTRL**, select your mail partner and three other classmates, and then release **CTRL**	*The members are selected.*
7.	Choose Members	*The names appear in the personal distribution list pane.*
8.	Choose OK	*The names are added to the pane in the New Personal Distribution List Properties dialog box.*
9.	Choose OK	*Your personal distribution list name appears in your Personal Address Book name list in bold.*

END

Editing a Personal Distribution List

You might want to add members to a personal distribution list, or you might need to remove existing members. To edit your lists, open the List Properties dialog box.

METHOD

To add personal distribution list members:

1. On the Standard toolbar, click the Address Book button.
2. If necessary, in the Address Book window, from the *Show Names from the:* drop-down list, select Personal Address Book.
3. In the address list, double-click the name of the personal distribution list to which you want to add members.
4. In the List Properties dialog box, choose Add/Remove Members.
5. In the Edit Members dialog box, select the name(s) you want to add to the group.
6. Choose Members.
7. Choose OK.
8. In the List Properties dialog box, choose OK.

To remove personal distribution list members:

1. On the Standard toolbar, click the Address Book button.
2. If necessary, in the Address Book window, from the *Show Names from the:* drop-down list, select Personal Address Book.
3. In the address list, double-click the name of the personal distribution list from which you want to remove members.
4. In the List Properties dialog box, choose Add/Remove Members.
5. In the Edit Members dialog box, select the name(s) you want to remove from the group.
6. Press DELETE
7. Choose OK.
8. In the List Properties dialog box, choose OK.

EXERCISE

In the following exercise, you will edit a personal distribution list.

1.	Make sure the Address Book window is open	
2.	In the *Select Names from the* drop-down list, make sure Personal Address Book is displayed	
3.	Double-click the personal distribution list name *Classmates*	*The Classmates Properties dialog box appears.*
4.	Choose Add/Remove Members	*The Edit Members of Classmates dialog box appears.*
5.	In the address list, select another student's name	
6.	Choose Members	*The student's name is added to the group.*
7.	In the personal distribution list, select any name	
8.	Press **DELETE**	*The name is removed.*
9.	Choose OK	*The changes are accepted.*
10.	Choose OK	*The Classmates Properties dialog box is closed.*

END

Deleting a Personal Distribution List

You should keep your Personal Address Book a manageable size so that you can easily find entries. When you complete a project, for example, you no longer need a personal distribution list for that project, so you should delete the list.

METHOD

To delete a personal distribution list:

1. On the Standard toolbar, click the Address Book button.
2. From the *Show Names in the:* drop-down list, select Personal Address Book.
3. In your Personal Address Book, select the personal distribution list you want to delete.
4. Press DELETE
5. In the message box that asks, *Are you sure that you want to permanently remove the selected user(s) from this Address Book?* choose Yes.

EXERCISE

In the following exercise, you will delete a personal distribution list.

1.	Make sure the Address Book window is open	
2.	In the *Select Names from the:* drop-down list, make sure Personal Address Book is displayed	
3.	Select the personal distribution list name *Classmates*	*The Classmates Properties dialog box appears.*
4.	Press DELETE	*A message box that asks* ***Are you sure that you want to permanently remove the selected user(s) from this Address Book?*** *Appears.*
5.	Choose Yes	*The personal distribution list is deleted.*
6.	Close the Address Book window	

END

Using Message Features

Outlook includes numerous message features that make your e-mail operations simple. For example, Outlook lets you save and close a message without sending it so that you can work on it later. Outlook provides spelling options that speed up your text entry and automatically make corrections. If you are asking message recipients for their opinions, Outlook lets you include voting buttons in your message that indicate acceptance or rejection and automatically return the responses to you. Outlook also lets you set such message options as importance and return receipt, and lets you attach files to your messages. Should you realize that you inadvertently sent a message to the wrong recipient, Outlook lets you recall your message if the recipient hasn't opened it. If you receive a message for which you must take follow-up action, Outlook provides a means to flag the message for later attention.

Saving and Closing a Message without Sending It

If you need to end your work session but have not completed a message or do not wish to send it yet, you can save the message without sending it. If you try to close an unsent message, a message box warns you to save your work before closing. The unsent message then appears in the message list in your Draft folder. You can open the saved message and resume work on it or send it at any time.

METHOD

To save and close a message without sending it:

1. In the New Message window, on the toolbar, click the Save button.
2. Close the window.

To send a saved message:

1. Open the Drafts folder.
2. Open the saved message.
3. Complete and send the message.

EXERCISE

In the following exercise, you will save and close a message without sending it.

1. Create a new message	
2. Address the message to your e-mail partner	
3. In the Subject text box, type **Mardi Gras Plans**	
4. In the New Message window message area, type **The attached file lists our restaurant's plans for Mardi Gras.**	
5. On the toolbar, click the Save button	
6. Close the New Message window	*The message subject appears in the message list.*
7. Open the Drafts folder	*The saved message appears in the message list*
8. Open the **Mardi Gras Plans** message	
9. Complete and send the message	*The message is now stored in the Sent Items folder*

END

Setting Spelling Options

You should write your messages as carefully as you write other documents. Careless spelling and grammar errors reflect poorly on you. You set spelling options in the Spelling Tab of the Options dialog box, shown in Figure 8-7.

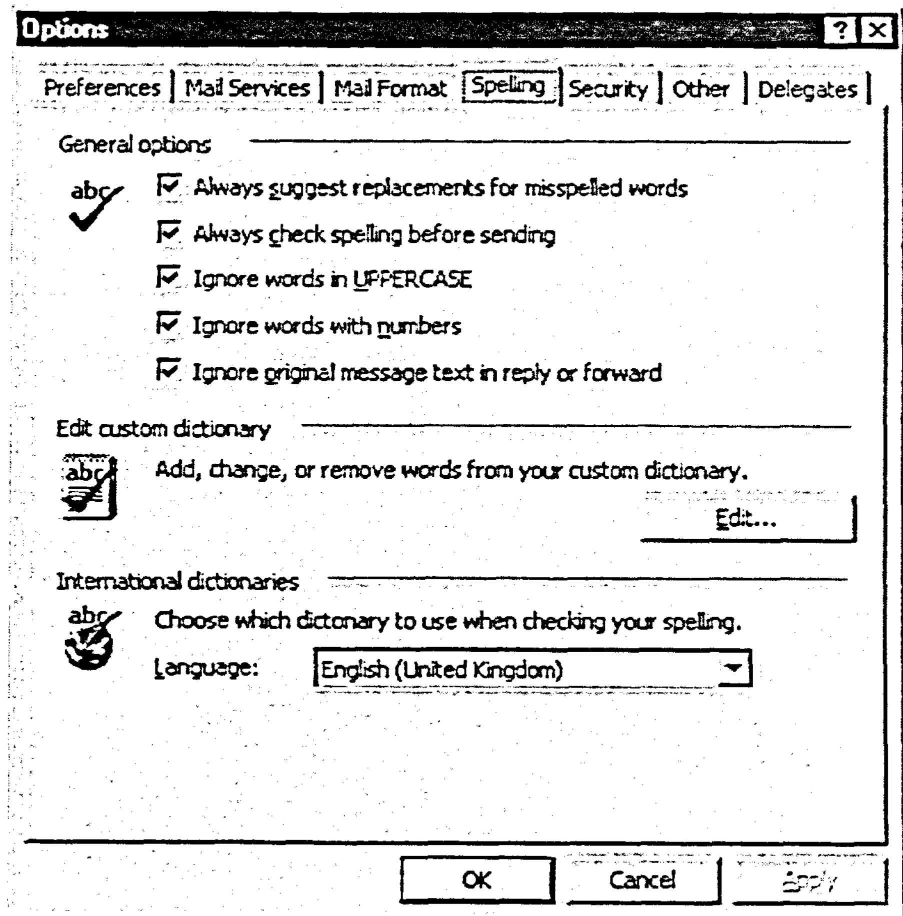


Figure 8-7: *The Spelling Page of the Options Dialog Box*

METHOD

To set spelling options:

1. From the Tools menu, choose Options.
2. In the Options dialog box, select the Spelling tab.
3. On the Spelling tab, select the check boxes for the desired feature.
4. Choose OK.

EXERCISE

In the following exercise, you will set spelling options.

1.	From the Tools menu, choose Options	*The Options dialog box appears.*
2.	Select the Spelling tab	*The Spelling page appears.*
3.	If necessary, select the following check boxes: Always suggest replacements for misspelled words Always check spelling before sending Ignore words in UPPERCASE Ignore words with numbers Ignore original message text in reply or forward	
4.	Choose OK	*The Options dialog box closes.*

END

Setting and Using Message Options

When you know the message you are sending is especially important (or, likewise, unimportant) you can mark it to show the recipient its urgency. If you set the importance of a message to high, the recipient sees a red exclamation point in the message list. If you set the importance to low, the recipient sees a blue down arrow. If the importance is normal, the recipient sees no icon beside the message in the message list.

When you request a delivery receipt or a read receipt, Outlook automatically sends you a receipt that tells you when your message was delivered or was read.

You use the Message Options dialog box shown in Figure 8-8, to set options for the current message only. You must click the Options button on the Untitled Message window's toolbar to display it. Table 8-3 summarizes the options.

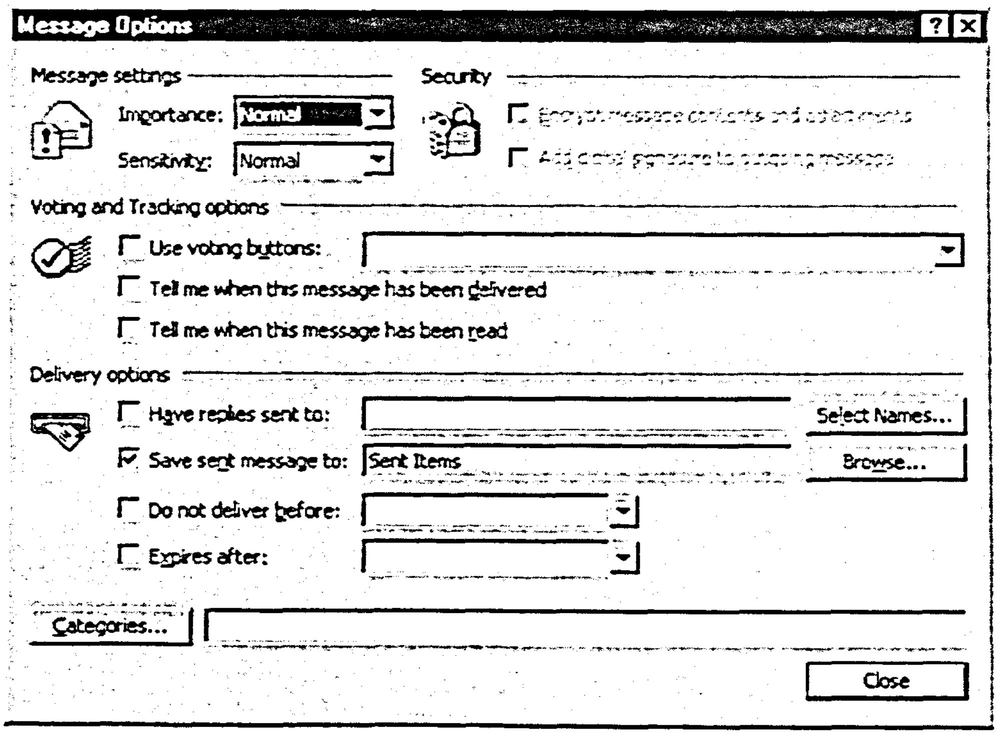


Figure 8-8: *The Message Options Dialog Box*

Option type	Name	Function
Message settings	Importance	Sets the message importance to high or low.
Message settings	Sensitivity	Sets the message sensitivity to personal, private, or confidential.
Voting and Tracking Options	Use voting buttons	Adds labeled buttons to your message so recipients can respond to a proposal with a click of the button.
Voting and Tracking Options	Tell me when this message has been delivered	Requests a receipt when the message has been delivered.
Voting and Tracking Options	Tell me when this message has been read	Requests a receipt when the recipient opens the message.
Delivery Options	Have replies sent to	Assigns someone else to receive the replies to a message.
Delivery Options	Save sent message to	Saves a copy of the sent message in the specified folder.
Delivery Options	Do not deliver before	Sets the earliest possible delivery date.
Delivery Options	Expires after	Deletes a message if it is not delivered by the specified date.

Table 8-3: *Message Options*

METHOD

To set the importance for a message:

1. On the New Message window toolbar, click the Importance: High button or the Importance Low button.
   or
1. In the Options dialog box, in the Message settings area, from the Importance drop-down list, select Low, Normal, or High.

To set General, Delivery, and Tracking options for a message:

1. In the Options dialog box, in the Delivery options area, select the desired options check boxes.
2. Where necessary, select details from the drop-down list.

EXERCISE

In the following exercise, you will set and use message options.

1.	Create a new message and address it to your partner	
2.	On the toolbar, click the Importance: High button	
3.	In the Subject field, type **Sub for me?**	
4.	In the message area, type **I'd like to go away this weekend. Can you sub for me?** and then press ENTER twice	
5.	Type your initials, using lowercase letters, and then press SPACEBAR	*Your name appears.*
6.	Click the Options button	*The Options dialog box appears.*
7.	In the Message settings area, make sure the Importance drop-down list box displays High	
8.	In the Voting and Tracking options area, select the *Tell me when this message has been read* check box and choose Close	
9.	Send the message	
10.	When you receive the Sub for me? message, check its importance	*A red exclamation point appears in the Priority column.*
11.	Open and read the message	
12.	When you receive the Read Report message indicating receipt of your message, open it, read it, and then close it	

END

Using Voting Buttons

An additional Voting and Tracking option available in a new message is using voting buttons. When you use voting buttons, you make it easy for the recipient to respond to a question. The recipient sees the buttons in the new message above the tabs. When the recipient chooses a button, Outlook displays a message box like those shown in Figure 8-9 that asks the recipient to confirm the response. The recipient can select the *Edit the response before sending* option button to include a message with the vote. Once the recipient chooses OK, Outlook automatically sends a message to the sender that shows the recipient's response.

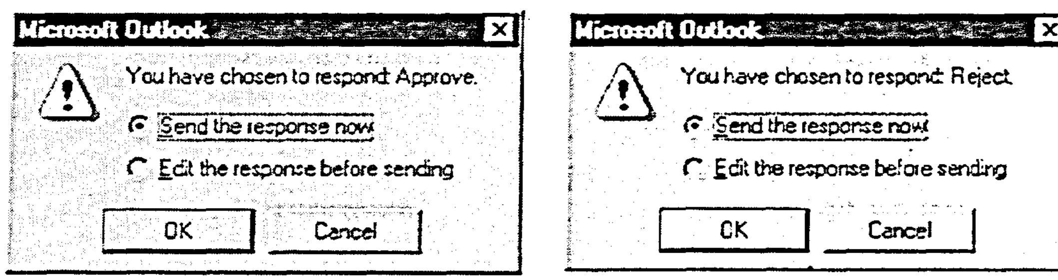


Figure 8-9: *Voting Message Boxes*

METHOD

To attach voting buttons to a message:

1. In the Options dialog box, select the Use voting buttons check box.
2. From the Use voting buttons drop-down list, select Approve;Reject, Yes;No, or Yes;No;Maybe.

To respond to a voting message:

1. In the voting message, choose a response button.
2. In the message box, select an option button.
3. Choose OK.
4. If editing the message, in the text box, type your message, and then send it.

EXERCISE

In the following exercise, you will use voting buttons.

1.	Create a new message and address it to your partner	
2.	In the Subject field, type **Band**	
3.	In the message area, type **I think Elena should hire a band. What's your opinion?**	
4.	Click the Options button	*The Options page appears.*
5.	Select the Use voting buttons check box	*Approve;Reject appears in the drop-down list box.*
6.	Click the Use voting buttons drop-down arrow to see the other button options, select Approve;Reject and choose Close.	
7.	Send the message	
8.	If necessary, check for new mail	
9.	Open and read the Band message from your partner	*The Approve and Reject voting buttons appear above the tabs.*
10.	Choose a voting button	*A message box appears.*
11.	Choose OK	*Outlook automatically sends your vote to the sender and closes the message.*
12.	When you receive the message indicating your partner's vote, open it, read it, and then close it	

END

Flagging a Message

When you send a message, you can flag it for follow-up, for the recipient's information, for forwarding, for a call, or for other actions. You can also flag messages you receive. You use the Flag for Follow-up dialog box, shown in Figure 8-10, to attach the flag. You can even indicate the date by which you or the recipient should act.

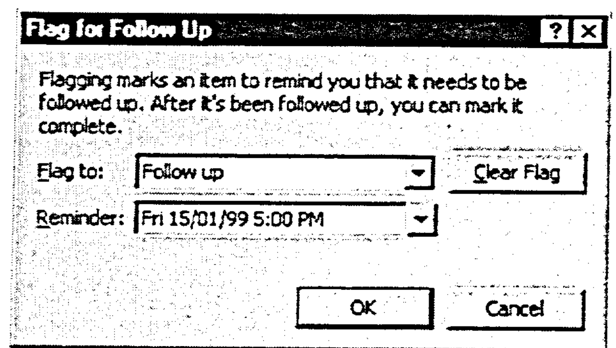


Figure 8-10: *The Flag for Follow-Up Dialog Box*

The message list displays a flag on the message line to indicate that a message is flagged. When you open the message, you see an information area below the tabs that displays the flagged message, as shown in the sample message in Figure 8-11.

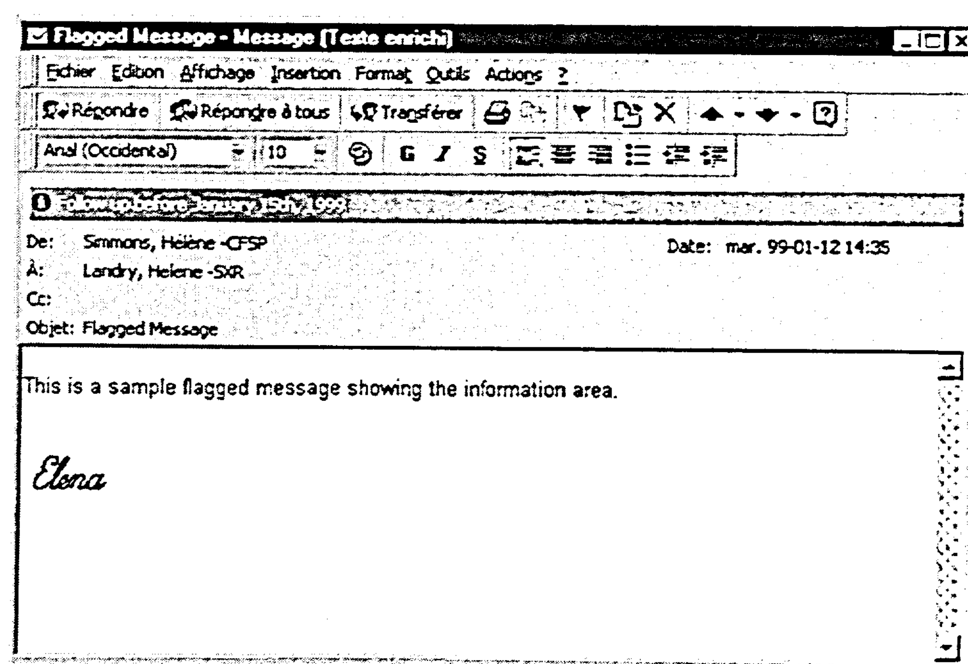


Figure 8-11: *A Sample Flagged Message Showing the Information Area*

METHOD

To flag a message:

1. On the Message window toolbar, click the Message Flag button.
2. In the Flag Message dialog box, click the Flag drop-down list arrow, and then select the flag.
3. In the By combo box, enter the due date.
4. Choose OK.

EXERCISE

In the following exercise, you will flag messages.

1.	Open the Sent Items folder	
2.	Open the **Mardi Gras** message	
3.	On the Message toolbar, click the Message Flag button	*The Flag Message dialog box appears.*
4.	Click the Flag drop-down list arrow to see other flag options, and then accept Follow up	
5.	In the Reminder combo box, type **tomorrow**	
6.	Choose OK	*The information area below the tabs displays tomorrow's date in the flagged message.*
7.	Close the message	*The flag appears beside the subject in the message list.*

END

Recalling a Message

You might send an e-mail message and then decide you want it back. You can recall a message any time before the recipient opens it, even if it has been delivered. There is, however, a time lag between when you recall a message and when it is successfully recalled. You recall a message using the Recall This Message dialog box, shown in Figure 8-12. You access this dialog box from the message's Actions menu.

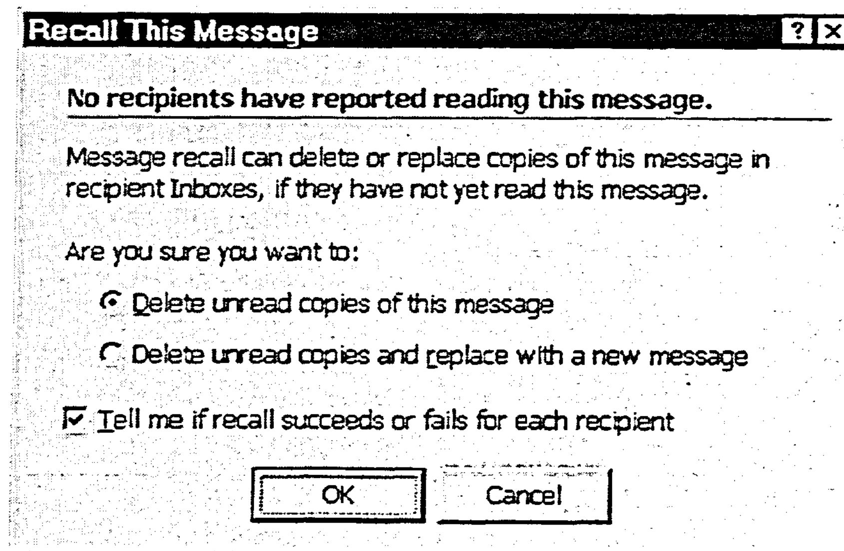


Figure 8-12: *The Recall This Message Dialog Box*

When you choose the *Delete unread copies of this message* option button, the message stays in your Sent Items folder but contains an information area that says, *You attempted to recall this message on [date and time of attempt].* When you choose the *Delete unread copies and replace with a new message* option button, the message contains an information area that says, *This message has not been sent.* Once the recall is successful, you receive a message in your Inbox that informs you that your message was recalled.

When you recall a message that has been delivered, the recipient might see the original message in his or her Inbox and a second message that says the sender attempted to recall the message. If the recipient cooperates and does not open the message, both messages disappear from the Inbox shortly thereafter.

METHOD

To recall a message:

1. From the Sent Items folder message list, open the message.
2. From the Actions menu, choose Recall This Message.
3. In the Recall This Message dialog box, select an option button.
4. Choose OK.

EXERCISE

In the following exercise, you will send and then recall a message.

1.	Prepare and send a message to your e-mail partner with the subject *Mardi Gras Plans*	
2.	From your Sent Items folder message list, open the *Mardi Gras Plans* message	
3.	From the Actions menu, choose Recall This Message.	*The Recall This Message dialog box appears.*
4.	Select the *Delete unread copies and replace with a new message* option button	
5.	Make sure the *Tell me if recall succeeds or fails for each recipient* check box is selected	
6.	Choose OK	*The message is recalled and is open. An information area that says* ***This message has not been sent*** *appears below the tabs.*
7.	Close the message	

END

Attaching a File

Outlook is an excellent tool for sending simple text messages. It is also great for sending complex information or different types of files that you include as *attachments.*

You use the Insert File button in the New Message window to attach a file to a message. An attachment is most frequently a data file created by a Windows application. For example, you might want to create a map providing directions to a meeting location in a graphics application and attach the file to a meeting invitation message. You use the Insert File dialog box, shown in Figure 8-13, to select and attach files to a message.

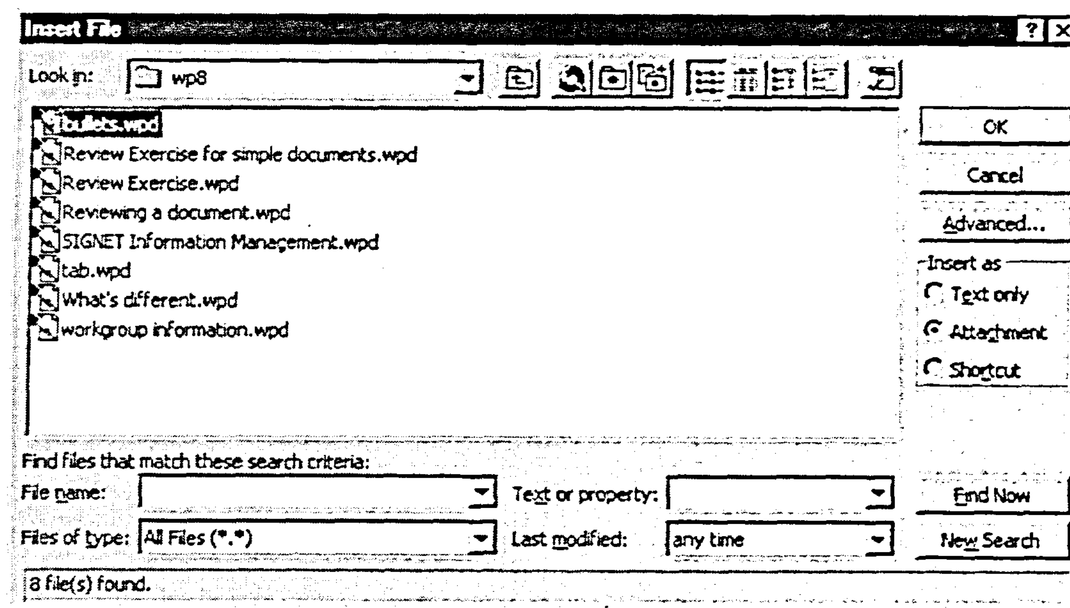


Figure 8-13: *The Insert File Dialog Box*

You can frequently identify the type of file attached to a message by examining the attachment icon in the message. For example, Figure 8-14 shows a message containing a text attachment and a graphic attachment. You might also want to include information in the message text about the kind of file the attachment is, in case the recipient does not have access to the application needed to open and use the attachment.

Although you can attach any type and number of files to a message, not all e-mail services can deliver messages with large attachments or with multiple attachments, so you might want to send only one large attachment per message.

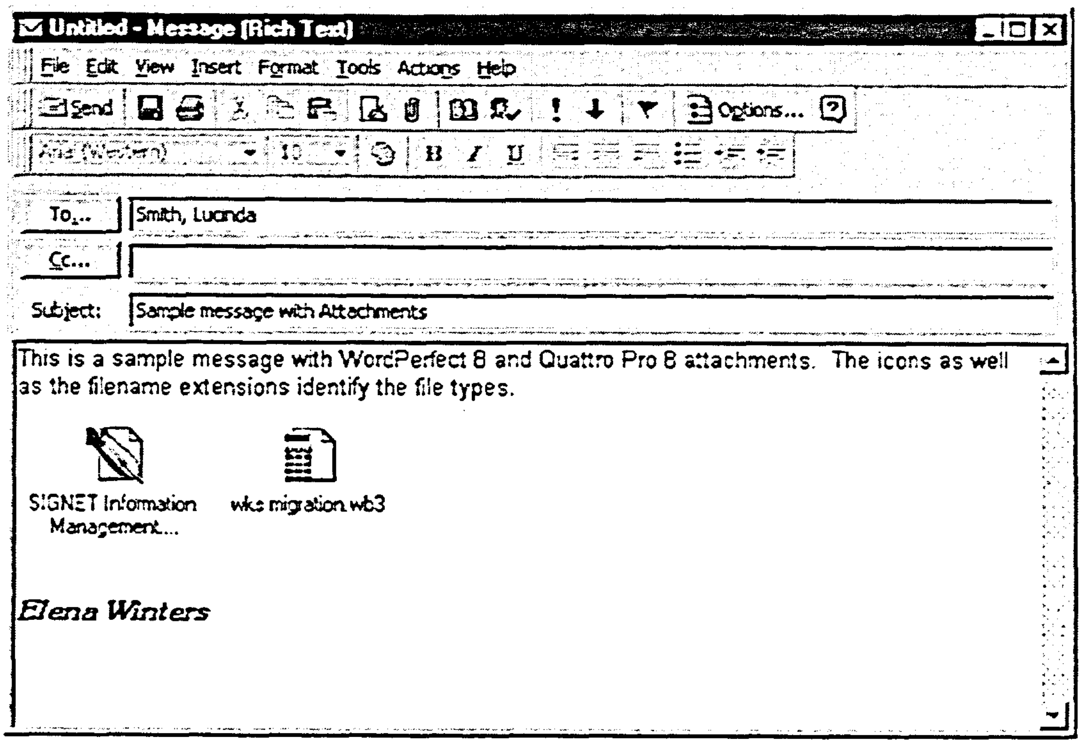


Figure 8-14: *A Sample Message with Attachments*

METHOD

To attach a file:

1. In a new message, position the insertion point in the message area where you want to attach the file.
2. On the toolbar, click the Insert File button.
   or
2. From the Insert menu, choose File.
3. In the Insert File dialog box, select the desired drive, folder, and file.
4. Choose OK.

EXERCISE

In the following exercise, you will insert a file in a message and send the message.

1.	Prepare a new message addressed to your e-mail address, type **Mardi Gras Plans** for the subject and place the insertion point in the message text field	
2.	On the toolbar, click the Insert File button	*The Insert File dialog box appears.*
3.	Select the **A:** drive	*The files in the folder are listed.*
4.	In the File Name list, select **Elena's Mardi Gras Plans.doc**	
5.	Choose OK	*The file is attached to the message.*
6.	Send the message	*A second copy of the message appears. The information area shows that you attempted to recall this message.*
7.	Close the message	

END

Opening, Closing, and Saving an Attached File

You need to view and open attachments in the messages you receive. To open an attachment, you must have the program that created the attached data file loaded on your computer (or have a special viewer utility). When you open an attachment, the program in which the attachment is embedded is automatically started. After you look at the attachment, you might want to save it.

METHOD

To open an attached Windows data file:

1. In the message, double-click the attachment icon.

To save an attachment:

Save Attachment dialog box method

1. In the message window, from the File menu, choose Save Attachments.
2. In the Save All Attachments dialog box, select the attachment(s) you want to save, choose OK, and then, in the next Save All Attachments dialog box, select the drive and folder where you want to save the attachment.
3. If desired, in the File name text box, type a new name for the attachment.
4. Choose Save.

Mouse method

1. In the Other Shortcuts group, open My Computer.
2. Select the folder where you want to save the attachment.
3. Drag the attachment icon from the message to the folder.

EXERCISE

In the following exercise, you will open, close, and save an attachment.

1.	Open the ***Mardi Gras Plans*** message in your Inbox	
2.	In the message body, double-click the attachment icon	*The Opening Mail Attachment Dialog Box appears*
3.	Click Open it and choose OK	*The attachment appears*
3.	Examine the document, and then close it	
4.	In the message window, from the File menu, choose Save Attachments	*The Save Attachment dialog box appears.*
5.	Make sure the **H:\doc** folder is selected	
6.	Type **Mardi Gras** for the filename	
7.	Choose Save	*The attachment is saved.*
8.	Close the message	

END

Section 8 Summary

To add a name to your Personal Address Book:

Inbox method

1. On the Standard toolbar, click the Address Book button.
2. If necessary, in the Address Book window, from the *Show Names from the:* drop-down list, select the address book from which you want to add a name.
3. From the address list, select the name(s) you want to add to your Personal Address Book.
4. On the Address Book window toolbar, click the Add to Personal Address Book button.
5. Close the Address Book window.

New message method

1. On the New message toolbar, click the Address Book button.
2. If necessary, in the Select Names dialog box, from the *Show Names from the:* drop-down list, select the address book from which you want to add a name.
3. From the address list, select the name(s) you want to add to your Personal Address Book.
4. Choose Properties.
5. In the Properties dialog box, choose Personal Address Book.
6. Choose OK.
7. Close the Address Book window.

To create an alias in your Personal Address Book:

1. On the Standard toolbar, click the Address Book button.
2. On the Address Book window toolbar, click the New Entry button.
3. In the New Entry dialog box, select the entry type.
4. Choose OK.
5. On the STMP-General page of the New Address Properties dialog box, in the Display Name text box, type the name you want to use to represent this address.
6. In the E-Mail address text box, type the e-mail address.
7. Choose OK.

To select a default address book:

1. From the Tools menu, choose Services.
2. In the Services dialog box, select the Addressing tab.
3. On the Addressing page, from the *Show this address list first:* drop-down list, select the desired address book.
4. If desired, from the *When sending mail, check names using these address lists in the following order:* list, select an address book, and then choose the up or the down arrow to change the priority order.
5. Choose OK.
6. Exit from and restart Outlook.

To create a personal distribution list:

1. On the Standard toolbar, click the Address Book button.
2. On the Address Book window toolbar, click the New Entry button.
3. In the New Entry dialog box, from the Select entry type list, select Personal Distribution List, and then choose OK.
4. In the New Personal Distribution List Properties dialog box, in the Name text box, type a name for your personal distribution list.
5. Choose Add/Remove Members.

6. Select the names.
7. Choose Members.
8. Choose OK.
9. In the New Personal Distribution List Properties dialog box, choose OK.
10. Close the Address Book window.

To add personal distribution list members:

1. On the Standard toolbar, click the Address Book button.
2. If necessary, in the Address Book window, from the *Show Names from the:* drop-down list, select Personal Address Book.
3. In the address list, double-click the name of the personal distribution list to which you want to add members.
4. In the List Properties dialog box, choose Add/Remove Members.
5. In the Edit Members dialog box, select the name(s) you want to add to the group.
6. Choose Members.
7. Choose OK.
8. In the List Properties dialog box, choose OK.

To remove personal distribution list members:

1. On the Standard toolbar, click the Address Book button.
2. If necessary, in the Address Book window, from the *Show Names from the:* drop-down list, select Personal Address Book.
3. In the address list, double-click the name of the personal distribution list from which you want to remove members.
4. In the List Properties dialog box, choose Add/Remove Members.
5. In the Edit Members dialog box, select the name(s) you want to remove from the group.
6. Press DELETE
7. Choose OK.
8. In the List Properties dialog box, choose OK.

To delete a personal distribution list:

1. On the Standard toolbar, click the Address Book button.
2. From the *Show Names in the:* drop-down list, select Personal Address Book.
3. In your Personal Address Book, select the personal distribution list you want to delete.
4. Press DELETE
5. In the message box that asks, *Are you sure that you want to permanently remove the selected user(s) from this Address Book?* choose Yes.

To save and close a message without sending it:

1. In the New Message window, on the toolbar, click the Save button.
2. Close the window.

To send a saved message:

1. Open the Drafts folder.
2. Open the saved message.
3. Complete and send the message.

To set spelling options:

1. From the Tools menu, choose Options.
2. In the Options dialog box, select the Spelling tab.
3. On the Spelling page, select the check boxes for the desired feature.
4. Choose OK.

To set the importance for a message:

1. On the New Message window toolbar, click the Importance: High button or the Importance Low button.
   or
1. In the Options dialog box Message settings area, from the Importance drop-down list, select Low, Normal, or High.

To set General, Delivery and Tracking options for a message:

1. In the Options dialog box, in the Delivery options area, select the desired options check boxes.
2. Where necessary, select details from the drop-down list.

To attach voting buttons to a message:

1. In the Options dialog box, select the Use voting buttons check box.
2. From the Use voting buttons drop-down list, select Approve;Reject, Yes;No, or Yes;No;Maybe.

To respond to a voting message:

1. In the voting message, choose a response button.
2. In the message box, select an option button.
3. Choose OK.
4. If editing the message, in the text box, type your message, and then send it.

To flag a message:

1. On the Message window toolbar, click the Message Flag button.
2. In the Flag Message dialog box, click the Flag drop-down list arrow, and then select the flag.
3. In the By combo box, enter the due date.
4. Choose OK.

To recall a message:

1. From the Sent Items folder message list, open the message.
2. From the Actions menu, choose Recall This Message.
3. In the Recall This Message dialog box, select an option button.
4. Choose OK.

To attach a file:

1. In a new message, position the insertion point in the message area where you want to attach the file.
2. On the toolbar, click the Insert File button.
   or
2. From the Insert menu, choose File.
3. In the Insert File dialog box, select the desired drive, folder, and file.
4. Choose OK.

To open an attached Windows data file:

1. In the message, double-click the attachment icon.

To save an attachment:

Save Attachments dialog box method

1. In the message window, from the File menu, choose Save Attachments.
2. In the Save All Attachments dialog box, select the attachment(s) you want to save, choose OK, and then, in the next Save All Attachments dialog box, select the drive and folder where you want to save the attachment.
3. If desired, in the File name text box, type a new name for the attachment.
4. Choose Save.

Mouse method

1. In the Other Shortcuts group folder, open My Computer.
2. Select the folder where you want to save the attachment.
3. Drag the attachment icon from the message to the folder.

Section 8 Self-Check Exercise

1. Add your instructor to your Personal Address Book.
2. Select the Global Address List as the default address book.
3. Exit from Outlook and restart it.
4. Create a personal distribution list called *Everyone* that includes your instructor and all the members of your class except for yourself.
5. Use your Personal Address Book to address a message to Everyone. In the Subject text box, type **Dinner.** In the message area, type **Let's meet at Elena's after class. Can you make it?** Save and close the message.
6. Reopen the *Dinner* message. Turn off the spelling options that suggest corrections and capitalize the first letter of a sentence.
7. In the *Dinner* message, from the **A:** drive, attach the file **Directions.bmp.**
8. In the *Dinner* message, set the message importance level as high. Add voting buttons that say Yes and No. Have replies sent to your instructor. Request a receipt when the message has been read. Then send the message.
9. Open the message from your partner. (Ignore all the other messages.) Open the attachment. Save the attachment in the **H:\doc** folder as **To Elena's.bmp**. Close the attachment. Choose a response button and send your reply.
10. When you receive a Read Report message indicating receipt of your message, open it, read it, and then close it. Ignore all other Read Report messages.
11. Address a new message to your partner. In the Subject text box, type **My Favorite Places.** Flag the message: For Your Information. In the message area, type **Here they are:** and then press SPACEBAR. Type the following places: **Accra, Athens, Buenos Aires**
12. Send the message and immediately recall it. Send the message again.

13. Remove your instructor from the *Everyone* personal distribution list. Then add yourself to the list.

14. Delete the *Everyone* personal distribution list.

Section 9

Working with Contacts

- Refining Your Contact List
- Accessing Contacts Directly

Section Skills and Their Importance

In the following section you will learn to:

- **Refine your contact list**
  When you have several contacts from one company, you can copy the information you have already entered about the company and use it with each new contact. To make locating contacts easier, you can use Outlook's File As feature.

- **Access contacts directly**
  You can access a contact's web page directly from the Contact window, just as you can address an e-mail message to a contact. In addition, you can manage your favorite web pages while working in Outlook.

Refining Your Contact List

As you add more and more contacts, you might find that several address cards have similar information. You can easily add new contacts from the same company or organization by retrieving the information you have previously entered. You might also find that, as your contact list grows, you remember a contact's first name or nickname or other piece of information but not the last name. Using Outlook's File as feature, you can designate under what name to file the address card.

Adding a Contact from the Same Company

Sometimes you might want to add multiple contacts who work for the same company to your contact list. Outlook lets you reproduce company information on a new address card to which you then add the individual information. This procedure is faster than creating a new address card from scratch, since the company name and address and sometimes even the business phone number are the same.

METHOD

To add a contact from the same company:

1. Select an address card from the company.
2. From the Actions menu, choose New Contact from Same Company.
3. In the New Contact window, enter the appropriate information.
4. On the toolbar, click the Save and Close button.

EXERCISE

In the following exercise, you will add a contact from the same company.

1. Open the Contacts folder
2. Select the Clio Hebert address card

3. From the Actions menu, choose New Contact from Same Company	*The New Contact window appears displaying Company, Address, and Phone data*
4. In the Full Name text box, type **Marietta LaPierre**	
5. In the Job title text box, type **Chef**	
6. On the toolbar, click the Save and Close button	*The address card for Marietta LaPierre appears in the contact list.*

END

Using the File as Feature

You might find it helpful to file your contacts by information other than their last names. For example, you might want to file your dentist as Dentist instead of as Dr. Jones. The File as feature lets you designate how to show your contacts on the address cards. You can also file your contacts by company name or by a combination of their name and their company name. If you prefer to list them by nickname or position, you can type that information into the File as combo box as well. Figure 9-1 shows a Contact window with the default File as drop-down list giving you five built-in File as selections.

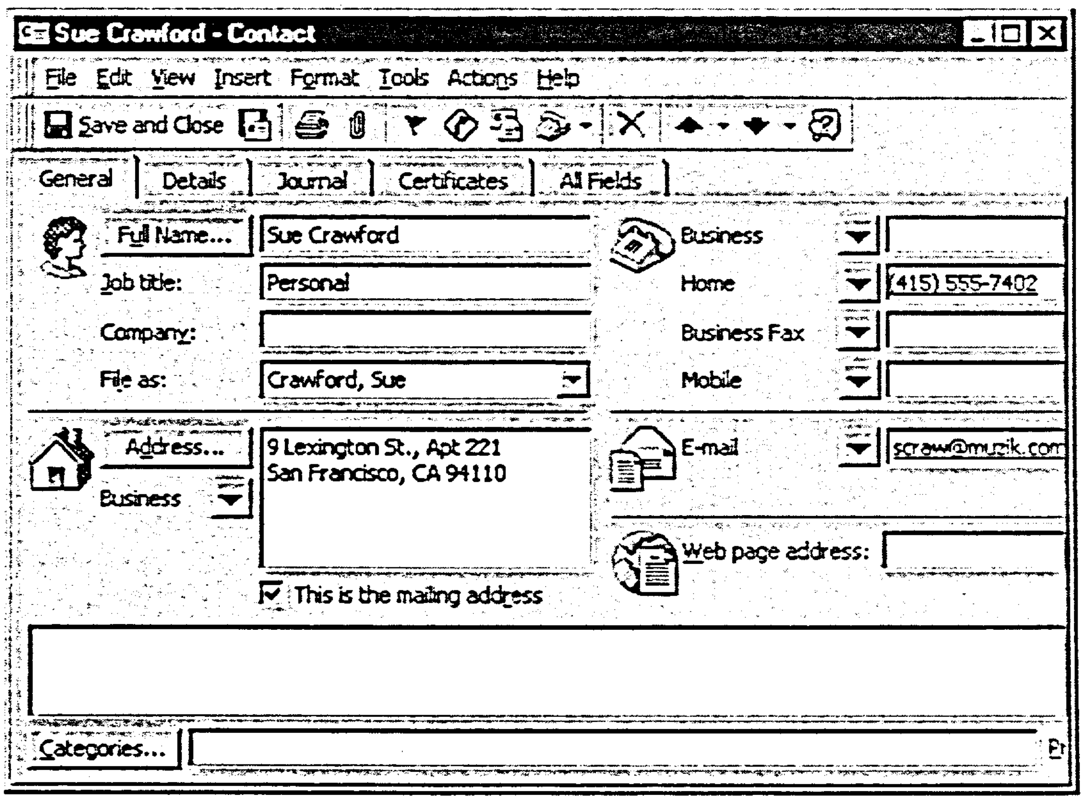


Figure 9-1: *The Contact Window Showing the File as Drop-Down List*

METHOD

To use the File as feature:

1. Double-click the address card.
2. In the Contact window, from the File as drop-down list, select a listing.
   or
2. In the Contact window, in the File as combo box, type the listing.
3. On the toolbar, click the Save and Close button.

EXERCISE

In the following exercise, you will use the File as feature.

1.	Double-click the Marietta LaPierre address card	*The Marietta LaPierre - Contact window opens.*
2.	In the contact window, from the File as drop-down list, select Gumbo Gulch	
3.	On the toolbar, click the Save and Close button	*The address card appears in the contact list as Gumbo Gulch, not as LaPierre, Marietta.*

END

Accessing Contacts Directly

Outlook helps you keep in touch with your contacts by providing automatic features that let you send an e-mail message to a contact using the address on the address card, connect you to a contact's web page, or dial a contact from your computer. To use the *AutoDial* feature that dials your contact, you must have a modem.

Sending a Message to a Contact

It's useful to fill out as much information on an address card as possible. When you fill in an e-mail address on a contact's address card, you can then send a message directly to the contact from the address card. Every time you add an e-mail address to an address card, you add an address to the e-mail Contacts address book. When you click the New Message to Contact toolbar button, shown in Figure 9-2, a New Message window opens with the message addressed to the contact. In order to see your Contacts folder in the Address Book, you must first add it to the Outlook Address Book.

Figure 9-2: *The New Message to Contact Button*

METHOD

To add your Contacts to the Address Book:

1. Right mouse click the Contacts folder
2. Select Properties.
3. Select the Outlook Address Book tab.
4. Select "Show this folder as an e-mail Address Book"and click OK.

To send a message to a contact:

Contact folder method

1. Double-click an address card.
2. In the Contact window, on the toolbar, click the New Message to Contact button.
3. In the New Message window, compose and send the message.

Inbox method

1. On the Inbox toolbar, click the Address Book button.
2. In the Address Book window, from the *Show Names from the:* drop-down list, select Outlook Address Book Contacts.
3. Select the contact.
4. On the toolbar, click the New Message button.
5. In the New Message window, compose and send the message.
6. Close the Address Book window.

EXERCISE

In the following exercise, you will send a message to a contact.

1.	Create an address card for your e-mail partner, including your partner's name and e-mail address	
2.	On the toolbar, click the New Message to Contact button	*The New Message window appears already addressed to your partner.*
3.	In the Subject text box, type **Message to Contact**	
4.	In the message area, type a brief message	
5.	Send the message	

END

Accessing a Contact's Web Page

To connect to a web page, you must have a web browser such Netscape Navigator installed. When you fill in the web page address text box on a contact's address card, you can then access the contact's web page directly from the selected address card. When you click the Explore Web Page button on the Advanced toolbar, shown in Figure 9-3, Outlook automatically opens your Internet browser and displays the contact's web page directly.

Figure 9-3: *The Explore Web Page Button*

METHOD

To access a contact's web page:

1. Select an address card.
2. On the Advanced toolbar, click the Explore Web Page button.

EXERCISE

In the following exercise, you will access a contact's web page.

1. Make sure your partner's Contact window is open	
2. In the Web page text box, type http://www.msnbc.com and click Save and Close.	
3. On the Advanced toolbar, click the Explore Web Page button	*the Internet browser displays your partner's web page.*

END

Section 9 Summary

To add a contact from the same company:

1. Select an address card from the company.
2. From the Actions menu, choose New Contact from Same Company.
3. In the New Contact window, enter the appropriate information.
4. On the toolbar, click the Save and Close button.

To use the File as feature:

1. Double-click the address card.
2. In the Contact window, from the File as drop-down list, select a listing.

   or
2. In the Contact window, in the File as combo box, type the listing.
3. On the toolbar, click the Save and Close button.

To add the Contact folder to the Outlook address book

1. Right mouse click the Contact's folder.
2. Select Properties.
3. Select the Outlook Address Book tab.
4. Select *Show this folder as an e-mail Address Book* and click OK.

To send a message to a contact:

Contact folder method

1. Double-click an address card.
2. In the Contact window, on the toolbar, click the New Message to Contact button.
3. In the New Message window, compose and send the message.

Inbox method

1. On the Inbox toolbar, click the Address Book button.
2. In the Address Book window, from the *Show Names from the:* drop-down list, select Outlook Address Book and then Contacts.
3. Select the desired contact.
4. On the toolbar, click the New Message button.
5. In the New Message window, compose and send the message.
6. Close the Address Book window.

To access a contact's web page:

1. Select an address card.
2. On the Advanced toolbar, click the Explore Web Page button.

Section 9 *Self-Check Exercise*

1. Add a new contact from Nature's Best Bets to your contact list. The contact, Andra Gautier, is a sales associate. Use the File as feature to file Andra under her company name.

   Hint: Find other contacts who work for the same company.

2. Send a new message to your partner, addressing the message by using your partner's address card. For the Subject, type **Self-Check** and, in the message area, type **This is a test.**

3. Open your partner's web page by using your partner's address card. Then use the browser's Address box to go to the MCI Internet Resources web page (**http://www.mci.com/resources**).

4. Close the browser and all open Contact windows.

Section 10

Working with Other Users

- Scheduling Meetings
- Managing Tasks

Section Skills and Their Importance

In the following section you will learn to:

- **Schedule meetings**

  Using Outlook's scheduling features, you view your colleagues' Calendars to choose a meeting time and plan a meeting. You can even plan a recurring meeting or schedule an event.

  Outlook lets you send meeting invitations, to which you can attach notes and documents. When you receive an invitation, you respond to it. When someone agrees to attend a meeting, Outlook automatically puts the meeting on the recipient's and on the sender's Calendars.

  You also review meeting information through your Calendar. You can find out who plans to attend, and you can reschedule or cancel a meeting when necessary. If you change a meeting time or date, Outlook notifies all the other attendees.

- **Manage tasks**

  You schedule your tasks or delegate tasks to colleagues and contacts and track their progress. If a colleague assigns a task to you, you respond to your colleague and, if necessary, place the task on your Calendar. If someone declines your task request, you can reclaim ownership of it.

  Some tasks you must repeat after a certain time period rather than at recurring intervals; you regenerate such tasks. When you receive a message that is not specifically a task request, perhaps from someone who does not use Outlook, you can create a task from the message by creating a new item from an existing one. You can also use this process to put a meeting on your Calendar.

Scheduling Meetings

A *meeting* is a scheduled activity that involves other people and can also involve *resources,* which include equipment, locations, and other people. You eliminate phone tag and coordination problems when you and your colleagues arrange meetings and assess work load and task status for a project by examining one another's Outlook folders from your own computers.

One of Outlook's greatest strengths is its capacity to let you work with others. For example, you could use Outlook to manage the steps involved in evaluating employee performance, as shown in Table 10-1.

Step	Purpose
Task	Evaluate employee performance.
Appointment	Write appraisals.
Meeting	Session with employees in conference room to explain purpose of appraisals. Need computer with projection capability to run a slide show that gives overview of evaluation process.
Meetings	Sessions with individual employees.
Task	Track status and mark completed.

Table 10-1: *Steps Needed to Evaluate Employee Performance*

Inviting Colleagues and Setting a Meeting Time

When you want to schedule a meeting, you click the Plan a Meeting toolbar button, shown in Figure 10-1. This button accesses the Plan a Meeting dialog box, shown in Figure 10-2, which lets you invite colleagues and set a meeting time.

Figure 10-1: *The Plan a Meeting Button*

In the Plan a Meeting dialog box, Outlook lets you see your schedule and the schedule of everyone else on your network whom you invite to the meeting.

Appointments shown as busy appear in blue, as tentative appear in light blue, and as out of the office appear as purple.

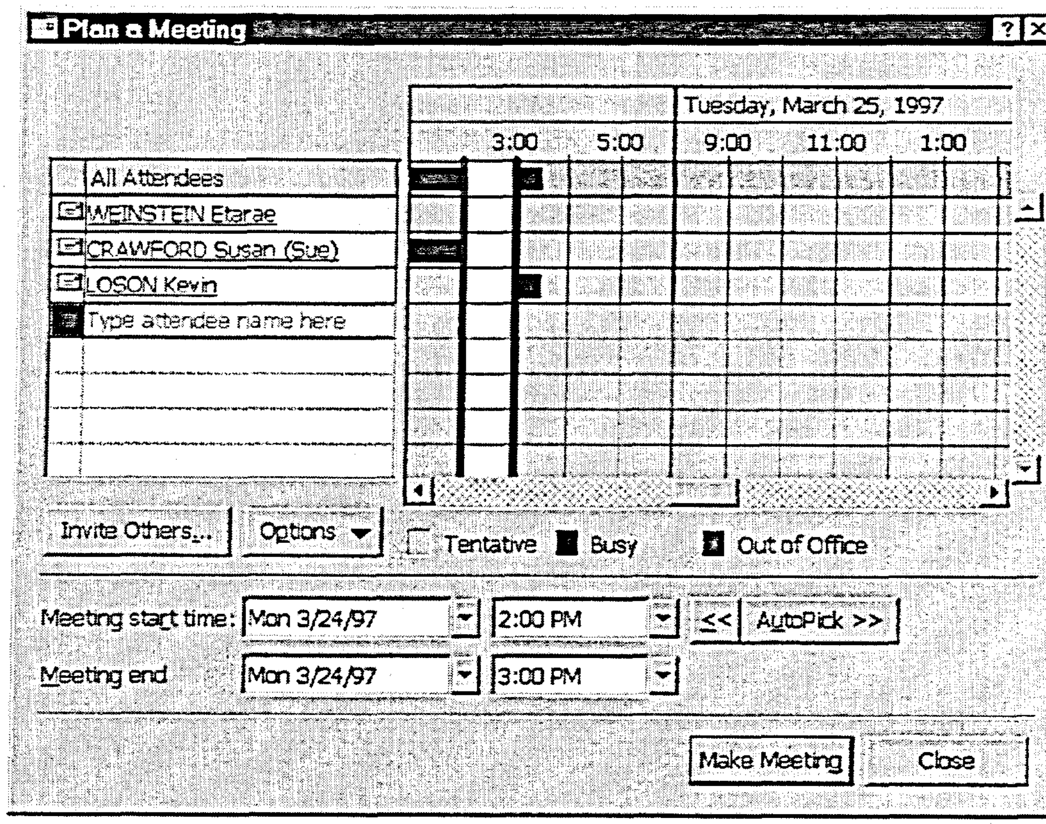


Figure 10-2: *The Plan a Meeting Dialog Box*

When you select a time for the meeting and choose Make Meeting, a Meeting Message window appears addressed to the invitees and shows the meeting time, as shown in Figure 10-3. You complete the meeting details in the Meeting Message window. If the meeting is a recurring meeting, you use the Recurrence button to access the Appointment Recurrence dialog box to set the frequency of the meetings. After you enter all meeting details, you send the message to the addressees.

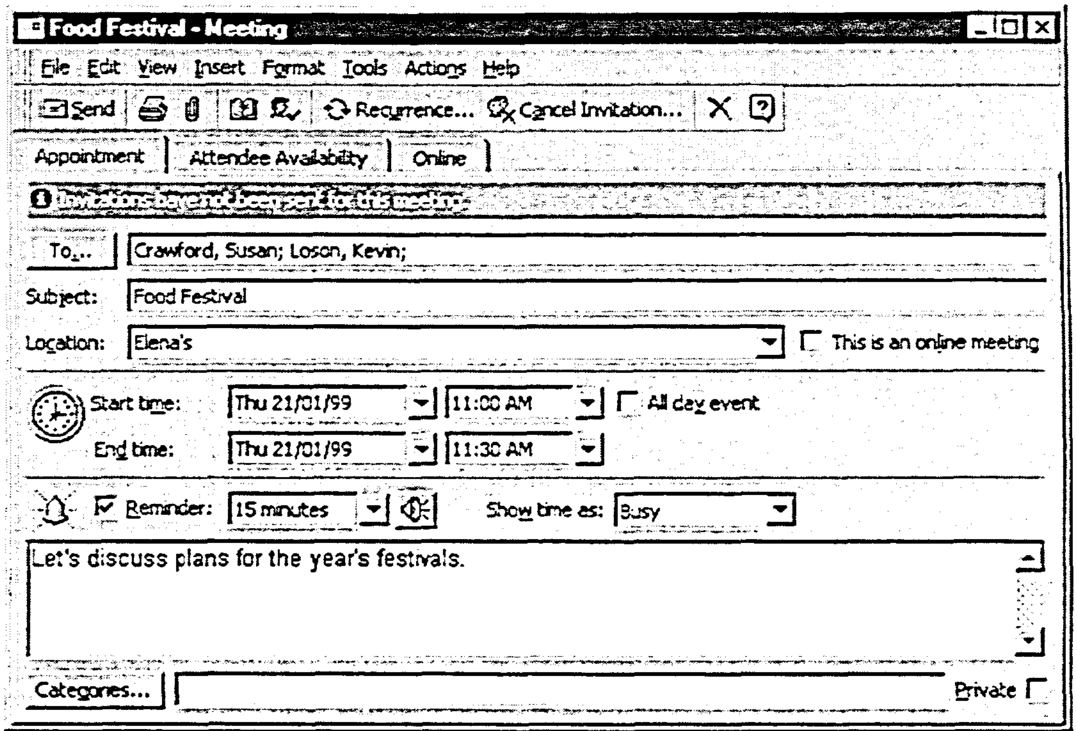


Figure 10-3: *The Meeting Message Window*

METHOD

To invite colleagues and set a meeting time:

1. On the Calendar Advanced toolbar, click the Plan a Meeting button.
2. In the Type attendee name here text box, type the names of the invitees.
   or
2. Choose Invite Others, and in the Select Attendees and Resources dialog box, from the Name list, select the names of the invitees.
3. Choose Required, Optional, or Resources, and then choose OK.
4. On the planner, examine all attendees and resources schedules.
5. In the Meeting start time and Meeting end time combo boxes, select dates and times for the meeting.
   or
5. Choose AutoPick.
6. Choose Make Meeting.
7. In the Meeting Message window, complete the information, and then send the message.

EXERCISE

In the following exercise, you will invite colleagues and set a meeting time.

1.	Open the Calendar folder	
2.	Schedule appointments according to Table 10-2	
3.	On your Calendar, display tomorrow's date	*Your appointment for tomorrow appears.*
4.	On the toolbar, click the Plan a Meeting button	*The Plan a Meeting dialog box appears, displaying your user name and your schedule for tomorrow.*
5.	In the Type attendee name here text box, type the user name of one of your workgroup partners, and then press ENTER	*Your partner's schedule appears in the planner.*
6.	Choose Invite Others	*The Select Attendees and Resources dialog box appears showing the user name of the partner whom you have selected.*
7.	From the Name list, select your other partner(s)'s user name(s), and then choose Required	*All your partners' user names appear in the Required list.*
8.	Choose OK	*Your partners' schedules appear in the planner.*
9.	Examine everyone's schedule	
10.	In the first Meeting start time combo box, select the date indicated in Table 10-3, and in the second combo box, select the first available time	

11. In the first Meeting end combo box, select the same date, and in the second combo box, select a time one hour after the start time

12. Choose Make Meeting

    A Meeting message window appears addressed to your partners and showing the meeting time.

13. In the Subject area, type **Food Festival**

14. In the Location area, type **Elena's**

15. In the message area, type **Let's discuss plans for next year's festival.**

16. Send the message

17. Examine your Calendar for tomorrow, the day after tomorrow, and the day one week from today

    Your Calendar displays the meeting you originated as well as the meetings your workgroup partners created.

END

Student	Subject	Date	Time	Show time as
Student1	A	tomorrow	9:00-10:00	Out of Office
	B	day after tomorrow	2:30-4:00	Busy
	C	one week from today	1:00-2:00	Tentative
Student2	D	tomorrow	11:00-12:00	Tentative
	E	day after tomorrow	9:00-10:00	Out of Office
	F	one week from today	4:00-5:30	Busy
Student3	G	tomorrow	2:00-3:00	Busy
	H	day after tomorrow	8:30-10:00	Tentative
	I	one week from today	11:00-12:30	Out of Office

Table 10-2: *The Workgroup Appointment Schedule*

Student	Date
Student1	tomorrow
Student2	day after tomorrow
Student3	week from today

Table 10-3: *The Workgroup Meeting Schedule*

Inviting a Contact to a Meeting

Usually, your meetings are not limited to only those colleagues who are in your e-mail postoffice. You might also meet with a contact for whom you have an address card in your contact list.

To automate inviting a contact to a meeting, you must fill in the contact's e-mail address on the contact's address card. You can then drag the address card onto the Calendar shortcut on the Outlook Bar to begin the invitation process.

METHOD

To invite a contact to a meeting:

1. Drag the contact's address card onto the Calendar shortcut on the Outlook Bar.
2. In the Meeting Message window, complete the information and then send the message.

Note: If your Outlook Address Book appears in your address book list, you can also address meeting invitations directly to your contacts using the address book.

EXERCISE

In the following exercise, you will invite a contact to a meeting.

1. If necessary, create an address card including an e-mail address and close the Contact window
2. Drag the contact card onto the Calendar shortcut on the Outlook Bar — *A Meeting Message window appears addressed to your partner and showing the meeting time.*
3. In the Subject text box, type **Advertising Campaign**
4. In the Location text box, type **Elena's office**

5. In the message area, type
   Let's critique the brochure.

6. Send the message

END

Responding to a Meeting Request

When you schedule a meeting and send the invitation message, the meeting automatically appears on your Calendar. Invited colleagues receive your message and decide whether to attend, just as you decide whether to attend a meeting or an event to which you are invited.

The received message, such as the invitation shown in Figure 10-4, includes response buttons (similar to voting buttons) on the toolbar that you use to respond to the meeting organizer to indicate whether you accept the invitation, you tentatively accept, or you decline. You can check your Calendar to make sure you have enough time before and after the meeting to meet your other commitments.

The meeting appears on your Calendar as a tentative meeting until you accept the invitation, at which time it appears as confirmed on your Calendar. If you decline the invitation, the meeting disappears from your Calendar. Before you respond, you can add a note to your reply. When you respond, Outlook automatically sends your response to the meeting organizer.

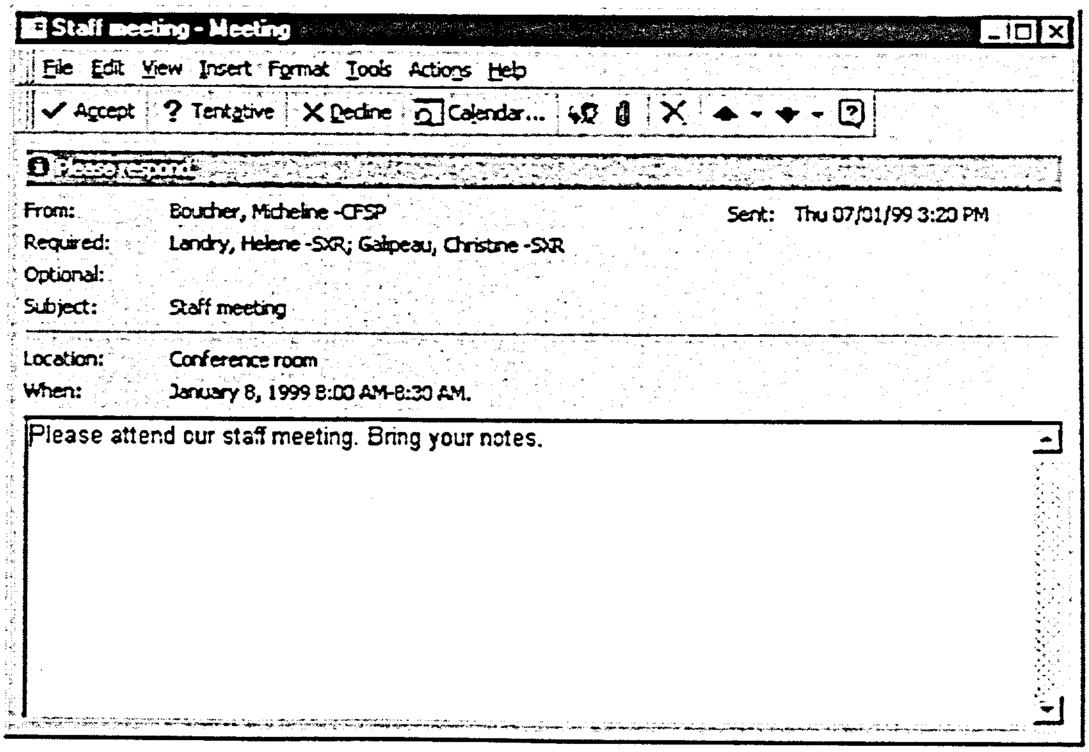


Figure 10-4: *An Invitation to a Meeting*

METHOD

To respond to a meeting request:

1. In the invitation message, on the toolbar, click the Calendar button.
2. Examine and then close your Calendar.
3. Choose Accept, Tentative, or Decline.
4. In the message box that asks, *Do you want to include comments with your response?* select an option button, and then choose OK.
5. If necessary, in the Accepted Meeting Response message window, type a response and/or attach a file.
6. Send the message.

EXERCISE

In the following exercise, you will respond to meeting requests.

1.	If necessary, check for new mail	
2.	Open the Inbox	
3.	Open the first *Food Festival* message from one of your workgroup partners	*The invitation appears with response buttons on the toolbar.*
4.	On the toolbar, click the Calendar button	*The meeting appears as a tentative meeting on your Calendar and displays a light blue move handle.*
5.	Examine and then close your Calendar	*The invitation reappears.*
6.	Choose Accept	*A message box that says* ***This meeting has been accepted and will be moved to your Calendar*** *and that asks,* ***Do you want to include comments with your response?*** *appears.*

7.	Select the *Don't send a response* option button, and then choose OK	
8.	Open the second *Food Festival* message	*The invitation appears with response buttons on the toolbar.*
9.	On the toolbar, click the Calendar button	*The meeting appears as a tentative meeting on your Calendar and displays a light blue move handle.*
10.	Examine the time slot for your previously scheduled meeting	*The move handle on this meeting time slot is now blue*
11.	Close your Calendar	*The invitation reappears.*
12.	Choose Decline	*A message box that asks,* ***Do you want to include comments with your response?*** *appears.*
13.	Select the *Edit the response before sending* option button, and then choose OK	*The Declined: Meeting Response message window appears.*
14.	In the message window, type **Sorry, but I don't intend to be on the committee.**	
15.	Send the message	
16.	Examine the time slot on your Calendar for the meeting you just declined	*The tentative meeting has disappeared.*
17.	Open the *Advertising Campaign* message and accept the meeting invitation	*The meeting is scheduled on your Calendar.*

END

Reviewing Meeting Information

When attendees accept your invitation, the meeting also appears on their Calendars. When you open the first response, you see whether that invitee plans to attend. When you open the second and later responses, you see a running tabulation of responses.

When you open the Meeting window, the Appointment page shows you the tabulated responses, the meeting time and location, and the text of the message you sent to all attendees. The Attendee Availability page, shown in Figure 10-5, shows you the status of each attendee and lets you invite more attendees.

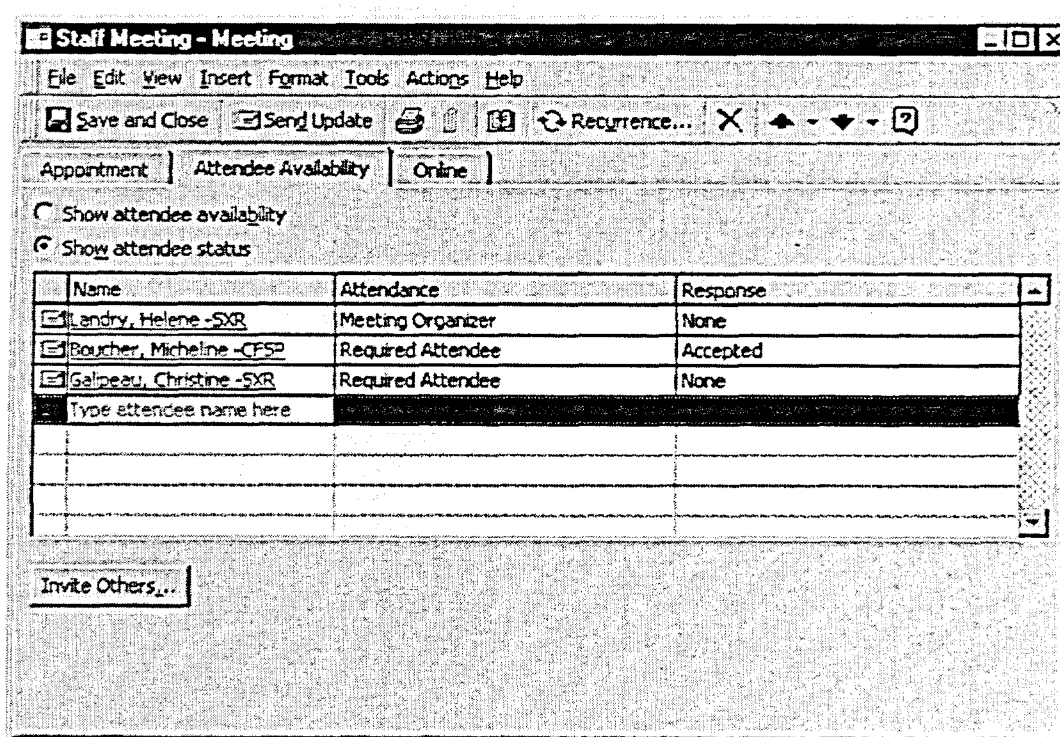


Figure 10-5: *The Attendee Availability Page of the Meeting Window*

METHOD

To review meeting information:

1. On your Calendar, double-click the meeting.
2. In the Meeting window, on the Appointment page, examine the tabulated responses, the meeting time and location, and the text of the message sent to all attendees.
3. Select the Attendee Availability tab.
4. On the Attendee Availability page, examine the status of each attendee.

EXERCISE

In the following exercise, you will review meeting information.

1.	On your Calendar, double-click the *Food Festival* meeting you organized	*The Meeting window appears showing the Appointment page. An information line tells you that one person accepted your invitation and one declined.*
2.	Select the Attendee Availability tab	*The Meeting Planner page appears.*
3.	Examine the status of each attendee	*You can read which partner accepted the invitation and which declined.*
4.	Close the Meeting window	
5.	In the Inbox, open and read the message from the workgroup partner who declined to attend your meeting, and then close the message	

END

Rescheduling and Canceling a Meeting

As the meeting organizer you can reschedule or cancel a meeting. Outlook reminds you to notify the attendees of the changes you make with the update and cancellation message boxes. Figure 10-6 shows an update message box.

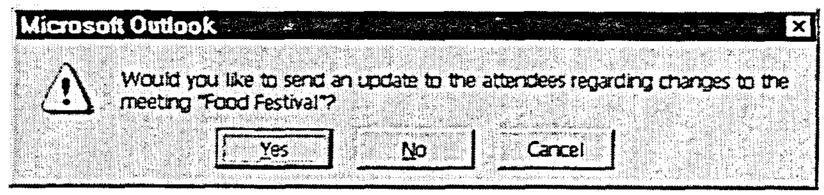


Figure 10-6: *An Update Message Box*

As an attendee, you can change your mind about attending a meeting you accepted or tentatively accepted by opening the Meeting window and selecting a new response button. Outlook sends your change to the meeting organizer.

METHOD

To reschedule a meeting:

1. On your Calendar, move the meeting to a new time slot.
2. In the message box that asks, Would you like to send an update...? choose Yes.
3. Review the Meeting message and, if necessary, make changes.
4. On the toolbar, click the Send Update button.

To cancel a meeting:

1. On your Calendar, select the meeting.
2. On the toolbar, click the Delete button.
3. In the message box that says, *The attendees have not been notified...*, select an option button, and then choose OK.

To cancel your attendance at a meeting:

1. On your Calendar, double-click the meeting.
2. In the Meeting window, select the Decline voting button.

EXERCISE

In the following exercise, you will reschedule a meeting and cancel a meeting.

1. On your Calendar, move the *Food Festival* meeting you scheduled to the time slot one hour later	*A message box that asks,* ***Would you like to send an update...?*** *appears.*
2. Choose Yes	*The Meeting message window with the details about the meeting you are moving appears.*
3. In the message area, below the current text, type **I was stuck in traffic and need more time.**	
4. On the toolbar, click the Send Update button	
5. On your Calendar, select the *Advertising Campaign* meeting	
6. On the toolbar, click the Delete button	*A message box that says,* ***The attendees have not been notified....*** *appears.*
7. Select the *Send cancellation and delete meeting* option button	
8. Choose OK	*The meeting is cancelled and all attendees are notified.*
9. Check for new mail and then open the messages	*The meetings are rescheduled and then cancelled.*
10. On the Calendar, double-click a meeting scheduled by one of your workgroup partners	
11. In the Meeting window, select the Decline voting button	*The meeting is removed from your Calendar, and a message that says you declined the meeting invitation goes to the meeting originator.*

Scheduling an Event

You can also add events to your colleagues' Calendars using the Plan a Meeting dialog box. You schedule an event as you would schedule a meeting, but in the Meeting message window, you select the All day event check box. When you select this check box, the time combo boxes disappear and the Meeting message window becomes an Invited Event message window, as shown in Figure 10-7.

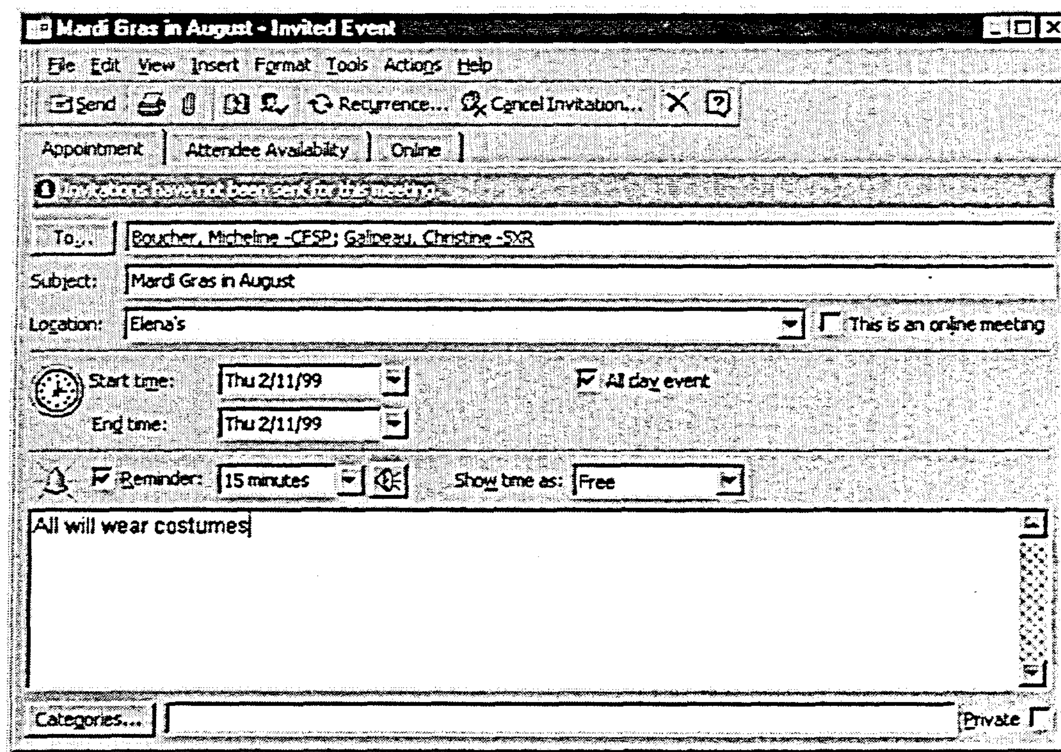


Figure 10-7: *The Invited Event Message Window*

Since an event lasts a whole day or longer and doesn't require an appointment, you can schedule events regardless of your colleagues' schedules. Suppose, for example, that your company wants to schedule a blood drive and arranges for a blood mobile to be available for two days. You can place the event on your colleagues' Calendars and then let your colleagues individually schedule their appointments with the blood mobile staff.

METHOD

To schedule an event:

1. Invite colleagues and set a meeting time for the desired date(s).
2. In the Meeting message window, select the All day event check box.
3. In the Invited Event message window, complete the information and send the message.

EXERCISE

In the following exercise, you will schedule an event.

1.	Invite your workgroup partners and set a meeting time according to the schedule in Table 10-4	
2.	In the Meeting message window, select the All day event check box	*The meeting times disappear. The title bar now shows the message window as Invited Event.*
3.	From the End time drop-down Date Navigator, select the last day of the month	
4.	In the Subject text box, type **Mardi Gras in [your month, as designated in Table 10-4]**	
5.	In the Location text box, type **Elena's**	
6.	In the message area, type **All servers will wear costumes.**	
7.	Send the message	
8.	Open the Mardi Gras in [a summer month] messages and then examine your Calendar for June, July, and August	*The event is listed every day for each of the months. No meetings or appointments are scheduled in connection with these events.*

END

Student	Date
Student1	next June 1
Student2	next July 1
Student3	next August 1

Table 10-4: *The Workgroup Event Schedule*

Completing Tasks

When you have tasks on your task list, you should schedule time to complete them. If you are working with colleagues on a project, Outlook lets you coordinate tasks with others in your network group. You can even assign tasks to others, as they can assign tasks to you.

Scheduling a Task

Moving tasks from your task list to your Calendar is easy. If you are working in your Tasks folder, you simply drag a task from your task list onto the Calendar shortcut on the Outlook Bar. If you are working in the Calendar folder, you select a time slot and then drag a task from the TaskPad directly onto the Calendar. Outlook opens an Appointment window that displays your task as the subject of the appointment. You then add details to the Appointment window to schedule work on the task. Figure 10-8 shows a task in an appointment window.

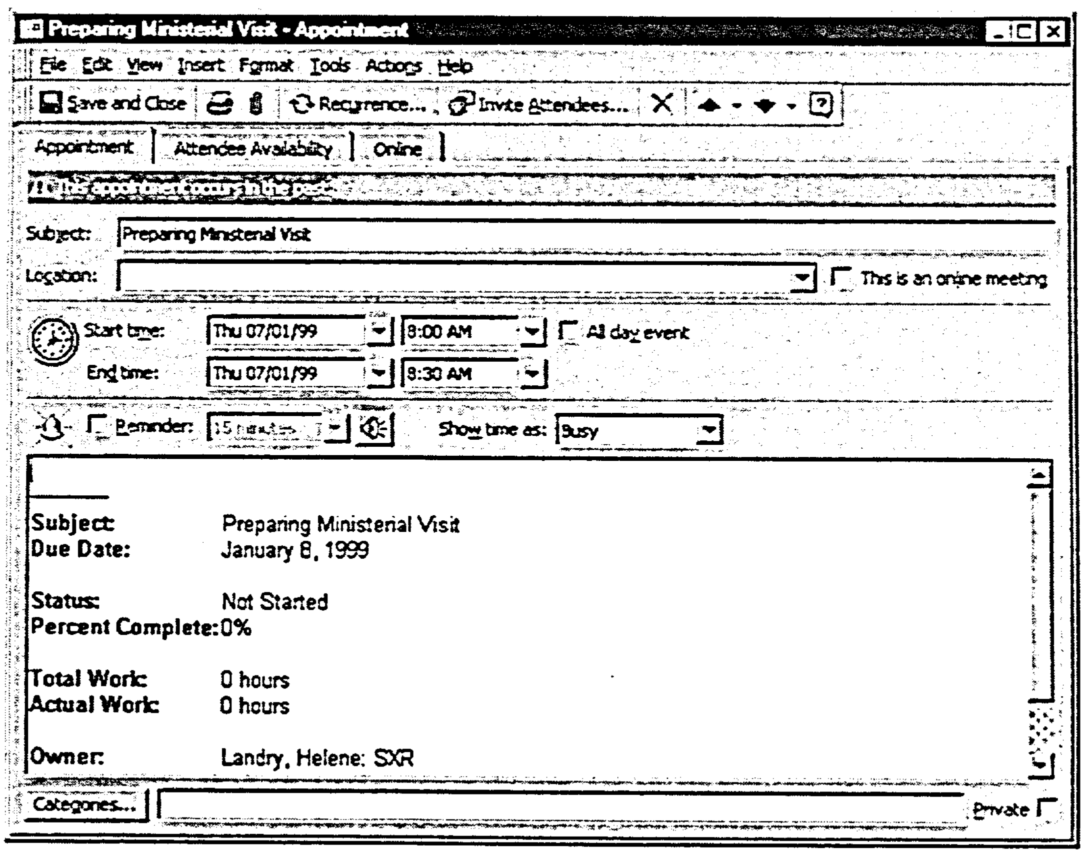


Figure 10-8: *A Task in an Appointment Window*

METHOD

To schedule a task:

1. In the Tasks folder, drag a task onto the Calendar shortcut on the Outlook Bar.
   or
1. In the Calendar folder, select a time slot, and then drag a task onto the Calendar.
2. If necessary, in the Appointment window, in the Start time area, from the drop-down Date Navigator, select a date, and from the time drop-down list, select a time.
3. If necessary, in the End time area, from the drop-down Date Navigator, select a date, and from the time drop-down list, select a time.
4. On the toolbar, click the Save and Close button.

EXERCISE

In the following exercise, you will schedule a task.

1.	Open the Tasks folder	
2.	Drag the Make kitchen clean-up check list task onto the Calendar shortcut on the Outlook Bar	*An Appointment window showing the task in the Subject text box and the details in its message area appears.*
3.	In the Start time area, from the drop-down Date Navigator, select a week from tomorrow, and from the time drop-down list, select 4:30 PM	
4.	In the End time area, make sure the date is a week from tomorrow, and from the time drop-down list, select 5:00 PM	
5.	On the toolbar, click the Save and Close button	*The task is scheduled on your Calendar.*

6.	Open the Calendar folder and examine the 4:30-5:00 time slot for one week from tomorrow	*The Make kitchen clean-up checklist task is scheduled.*
7.	Select the 10:00-noon time slot on the same date as the Make kitchen clean-up checklist task	
8.	From the TaskPad, drag the Change artwork on restaurant walls task onto the Calendar.	*When you start to drag the task, the blue coloring that indicates the selected time slot disappears. An Appointment window showing the task in the Subject text box and the details in its message area appears.*
9.	On the toolbar, click the Save and Close button	*The task is scheduled on your Calendar.*
10.	Examine the 10:00-noon time slot	*The Change artwork on restaurant walls task is scheduled.*

END

Regenerating a Task

Sometimes you need to start a task all over again some time after you have completed it. For example, you might want to clean off your desk monthly but you find you occasionally do it sooner. In such a case, you use the Task Recurrence dialog box, shown in Figure 10-9, to regenerate the task so that you remind yourself to clean off your desk one month after you last did it. Instead of designating that the task recur daily, weekly, monthly, or yearly on a certain day of that time period, you select the Regenerate new task option button and set up the task for regeneration after one month.

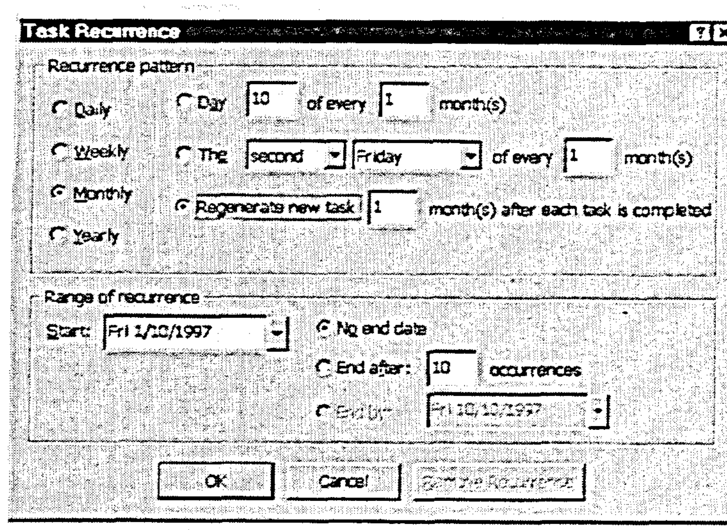


Figure 10-9: *The Task Recurrence Dialog Box Set to Regenerate a New Task*

METHOD

To regenerate a task:

1. Select a task and open the Task window.
   or
1. Create a task but do not close the Task window.
2. On the toolbar, click the Recurrence button.
3. In the Task Recurrence dialog box, in the Recurrence pattern area, select a time period option button, and then select the Regenerate new task option button and the numeral in the time period text box and enter the appropriate figure.
4. Choose OK.
5. In the Task window, on the toolbar, click the Save and Close button.

EXERCISE

In the following exercise, you will regenerate a task.

1.	Open the Tasks folder	
2.	Click the New Task button	*The New Task window appears.*
3.	In the Subject text box, type **Replace all spices**	
4.	On the toolbar, click the Recurrence button	*The Task Recurrence dialog box appears.*
5.	In the Recurrence pattern area, in the left column, select the Monthly option button	
6.	In the Recurrence pattern area, in the right column, select the Regenerate new task option button, select the text in the time period text box, and then type **6**	
7.	Choose OK	*The* ***Replace all spices*** *Task window reappears. The information area says* ***Due today. Due 6 months after this task is completed effective [today's date].***
8.	In the Due combo box, select the text, and then type **Next Friday** and then click the Subject text box	*The information area specifies in how many days the task is due.*
9.	On the toolbar, click the Save and Close button	*The task appears in the task list.*
10.	Mark the *Replace all spices* task completed	*A check appears in the Complete check box and a line appears through the subject and the due date. A new* ***Replace all spices*** *task appears with the due date six months from today.*

END

Assigning a Task to Someone Else

Just as you and your colleagues can see one another's Calendars to plan meetings, you can also see one another's task lists. You can assign a task to a colleague or to a contact and track that person's progress completing the task. If your contacts are not part of your network group, then you can send them the request, but you cannot track the progress automatically.

Once you assign a task to someone else, you cannot change the information in the task window. Outlook keeps track of who owns the task and notifies you whenever the new owner updates the status of the task. You use the Task message window, shown in Figure 10-10, to assign tasks.

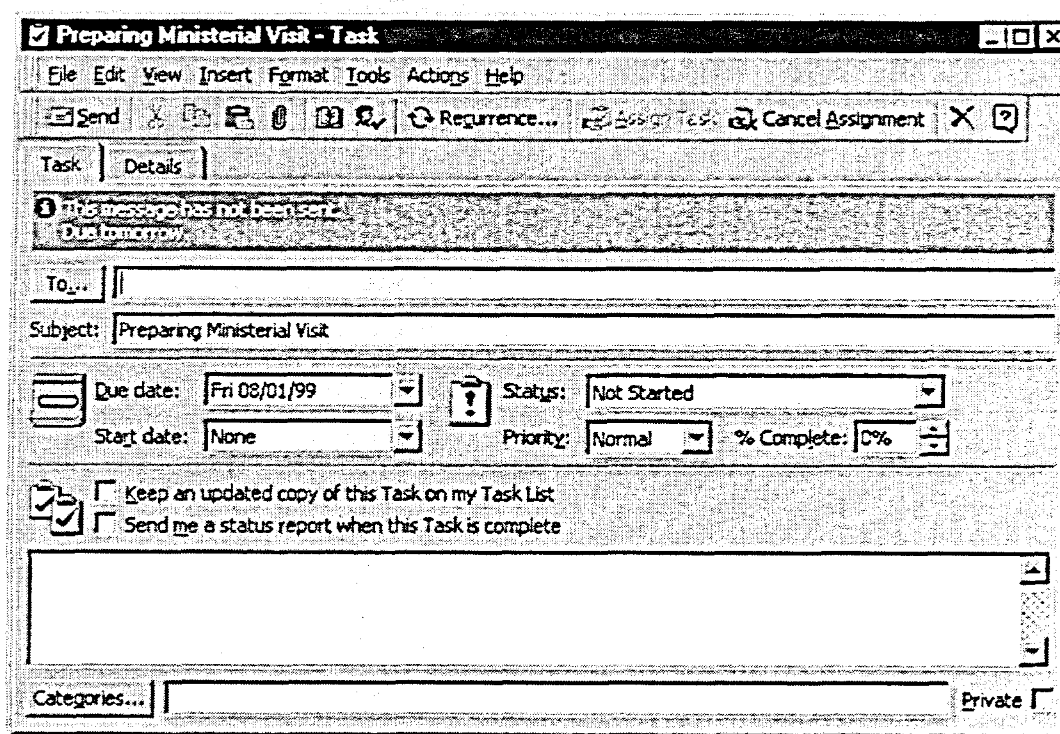


Figure 10-10: *The Task Message Window*

METHOD

To assign a new task to someone else:

1. From the Actions menu, choose Assign Task .
2. In the Task message window, address the request, enter a subject, and fill in appropriate information.
3. Make sure the *Keep an updated copy of this Task on my Task List* check box is selected.

4. Make sure the *Send me a status report when this Task is complete* check box is selected.
5. Send the message.

To assign a previously created task to someone else:

1. Double-click the task.
2. In the Task window, on the toolbar, click the Assign Task button.
3. In the Task message window, address the request, enter a subject, and fill in appropriate information.
4. Make sure the *Keep an updated copy of this Task on my Task List* check box is selected.
5. Make sure the *Send me a status report when this Task is complete* check box is selected.
6. Send the message.

EXERCISE

In the following exercise, you will assign a new task and a previously created task to someone else.

1.	From the Actions menu, choose New Task Request	*The Task message window showing the task in the Subject text box appears.*
2.	Address the request to your mail partner	
3.	In the Subject text box, type **Dessert Bake Off**	
4.	In the Due combo box, type **six months from today**	
5.	In the Start combo box, type **today**	*The text in the Due combo box becomes the date six months from today.*
6.	In the message area, type **Will you organize and run the contest?**	*The text in the Start combo box becomes today's date.*

7. Make sure the *Keep an updated copy of this Task on my Task List* check box and the *Send me a status report when this Task is complete* check box are selected	
8. Send the message	*The task list reappears.*
9. Double-click the *send fliers re: next month's specials…* task	*The Task window appears.*
10. On the toolbar, click the Assign Task button	*The Task message window showing the task in the Subject text box appears.*
11. Address the request to your mail partner	
12. In the Due combo box, type **25th of month**	
13. In the message area, type **Can you do this?**	*The text in the Due combo box becomes the actual date.*
14. Make sure the *Keep an updated copy of this Task on my Task List* check box and the *Send me a status report when this Task is complete* check box are selected	
15. Send the message	*Message boxes might appear that warn you that the due date for this task has passed and that you have changed a start date on a recurring task.*
16. As necessary, choose Yes and OK	

END

Responding to a Task Request

When you receive a task request, response buttons appear on the message toolbar that let you accept or decline the request. When you select a button, Outlook sends your response to the original owner of the task. If you accept the task, you become its new owner, and Outlook adds it to your task list. When you mark the task complete, Outlook automatically notifies the original task owner that you have completed the task. Figure 10-11 shows a received task request with response buttons on the toolbar.

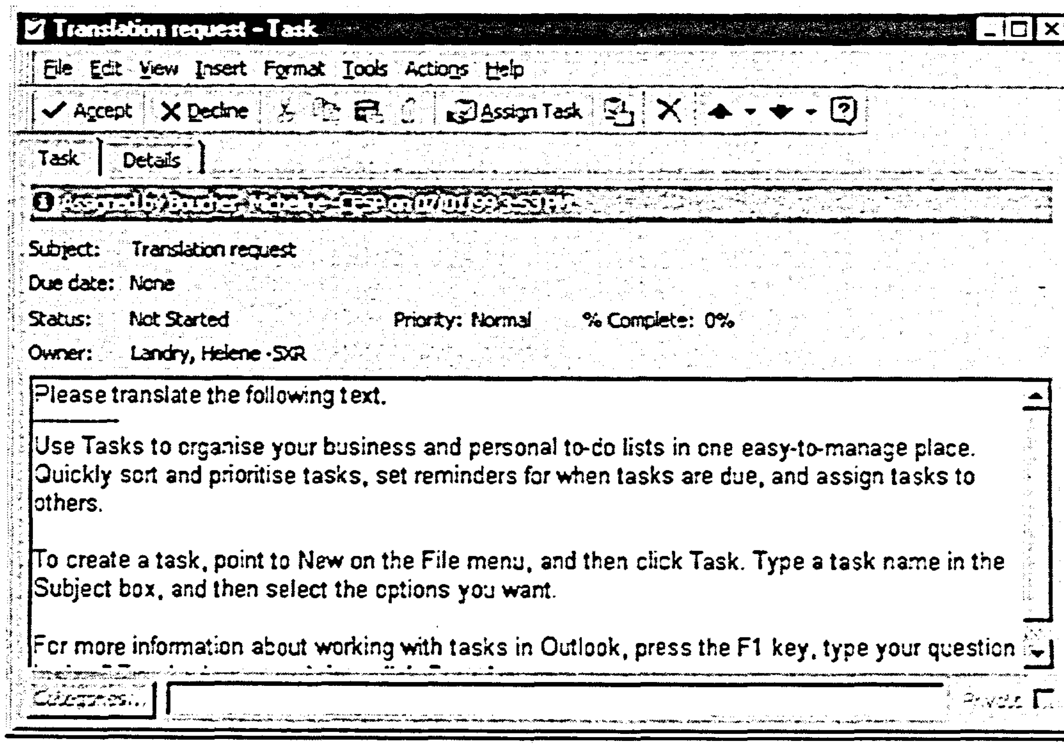


Figure 10-11: *A Received Task Request with Response Buttons*

The message toolbar also contains an Assign Task button, shown in Figure 10-12, that you can use if you do not want to perform the task yourself but want to reassign the task to a third person. You assign the task as if you were the original owner.

Figure 10-12: *The Assign Task Button*

If you decline a task assignment, Outlook returns your response to the original owner of the task and places your copy of the task in your deleted items folder.

METHOD

To accept or decline a task request:

1. In the task request message, on the toolbar, click the Accept or the Decline button.
2. In the message box, select the *Send the response now* option button, and then choose OK.
   or
2. In the message box, select the *Edit the response before sending* option button, and then choose OK.
3. If necessary, in the message window message area, type your response, and then send the message.

To reassign a task request:

1. In the task request message, on the toolbar, click the Assign Task button.
2. In the Task message window, address the task to the assignee.
3. In the message area, type a message.
4. If desired, select the *Keep an updated copy of this task on my task list* check box.
5. If desired, select the *Send me a status report when this task is complete* check box.
6. Send the message.

EXERCISE

In the following exercise, you will decline a task request and reassign a task request.

1. If necessary, check for new messages
2. In the Inbox, open the *Dessert Bake Off* message
3. On the toolbar, click the Decline button — *A message box that asks* ***Do you want to edit the response before sending it?*** *appears.*
4. Select the *Send the response now* option button, and then choose OK
5. If necessary, open the *send fliers re: monthly specials…* message
6. On the toolbar, click the Assign Task button — *The Task message window showing the task and the message appears.*
7. Address the task to one of your workgroup partners
8. In the message area, type **I don't have the time. Can you do this?**
9. Send the message — *A message box that warns,* ***The due date for this Task has passed,*** *appears.*
10. Choose Yes

END

Reclaiming Ownership of a Declined Task

If your colleague declines a task, you can reclaim ownership of it by returning the task to your task list.

METHOD

To reclaim ownership of a declined task:

1. In the message that contains the declined task request, from the Actions menu, choose Return to Task List.
2. In the Task window, on the toolbar, click the Save and Close button.

EXERCISE

In the following exercise, you will reclaim ownership of a declined task.

1.	If necessary, check for new messages	
2.	Open the Task Declined: Dessert Bake Off message	
3.	From the Actions menu, choose Return to Task List	*The Task window appears.*
4.	On the toolbar, click the Save and Close button	*The message disappears from the message list.*
5.	Examine your task list	*The task is returned to your task list.*

END

Creating a New Item from an Existing One

When you drag an item from a list in one folder onto the shortcut for another folder, Outlook's *AutoCreate* feature automatically creates a new item from the item you dragged. For example, if you drag a contact from the contact list onto the Inbox shortcut, AutoCreate addresses a new message to the contact. If you drag a note onto the Tasks folder shortcut, AutoCreate creates a new task from the note.

Suppose you receive a message that requests that you perform a task, but the message was not sent as a task request. When that happens, you use AutoCreate to create a new task from the message. When you drag the message from the Inbox onto the Task folder shortcut on the Outlook Bar, Outlook automatically converts the message to a task and copies the entire message to the large text box at the bottom of a New Task window. It also copies key data from the existing item to relevant fields in the new item. Figure 10-13 shows a new task that was created from a message.

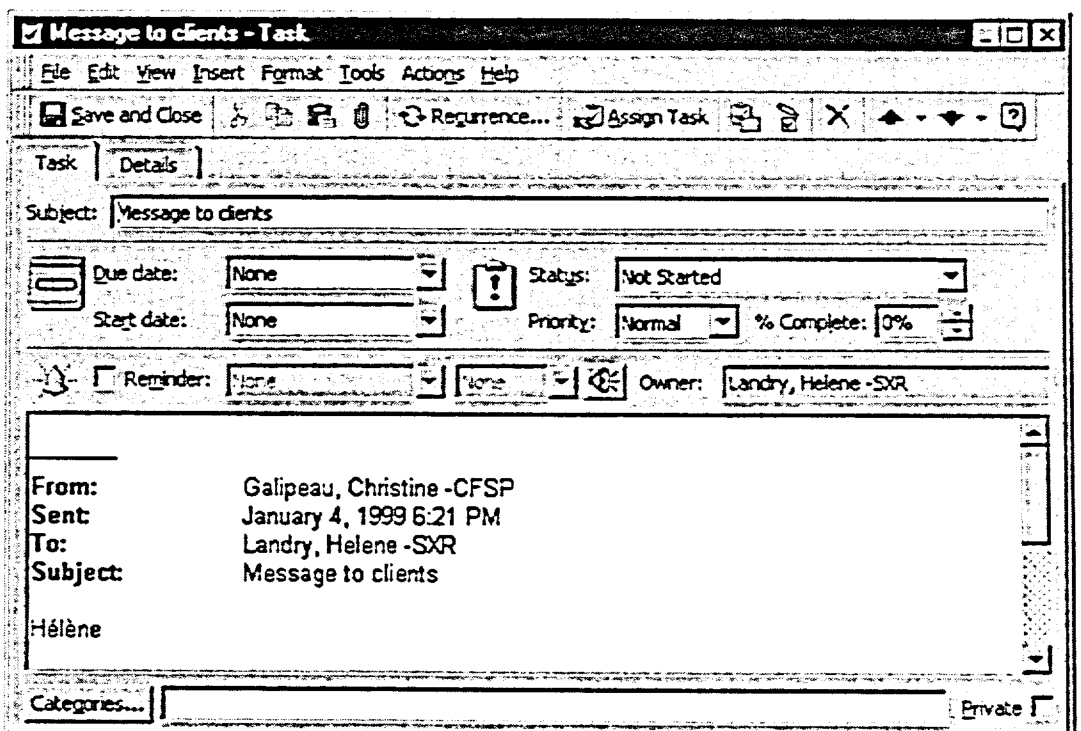


Figure 10-13: *A New Task Created from a Message*

METHOD

To create a new item from an existing one:

1. From an item list, drag an item onto the shortcut on the Outlook Bar.
2. In the folder window, if necessary, add more details.
3. On the toolbar, click the Save and Close button.

EXERCISE

In the following exercise, you will create new items from existing ones.

1.	Open the Contacts folder	
2.	From your contact list, drag your mail partner's address card onto the Inbox shortcut on the Outlook Bar	*The New Message window appears addressed to your partner.*
3.	In the Subject text box, type **Recipe Request**	
4.	In the message area, type **Please give me your recipe for Baklava.**	
5.	Send the message	
6.	Check for new mail	
7.	From the Inbox, drag the recipe request onto the Tasks shortcut on the Outlook Bar	*The Task window showing the message subject as the Task subject and the message details in the large text box appears.*
8.	On the toolbar, click the Save and Close button	
9.	Open the Tasks folder and examine the task list	*The new task appears in the list.*

END

Section 10 Summary

To invite colleagues and set a meeting time:

1. On the Calendar Advanced toolbar, click the Plan a Meeting button.
2. In the Type attendee name here text box, type the names of the invitees.
   or
2. Choose Invite Others, and in the Select Attendees and Resources dialog box, from the Name list, select the names of the invitees.
3. Choose Required, Optional, or Resources, and then choose OK.
4. On the planner, examine all attendees and resources schedules.
5. In the Meeting start time and Meeting end time combo boxes, select dates and times for the meeting.
   or
5. Choose AutoPick.
6. Choose Make Meeting.
7. In the Meeting Message window, complete the information, and then send the message.

To invite a contact to a meeting:

1. Drag the contact's address card onto the Calendar shortcut on the Outlook Bar.
2. In the Meeting Message window, complete the information and then send the message.

To respond to a meeting request:

1. In the invitation message, on the toolbar, click the Calendar button.
2. Examine and then close your Calendar.
3. Choose Accept, Tentative, or Decline.
4. In the message box that asks, *Do you want to include comments with your response?* select an option button, and then choose OK.
5. If necessary, in the Accepted Meeting Response message window, type a response and/or attach a file.
6. Send the message.

To review meeting information:

1. On your Calendar, double-click the meeting.
2. In the Meeting window, on the Appointment page, examine the tabulated responses, the meeting time and location, and the text of the message sent to all attendees.
3. Select the Attendee Availability tab.
4. On the Attendee Availability page, examine the status of each attendee.

To reschedule a meeting:

1. On your Calendar, move the meeting to a new time slot.
2. In the message box that asks, Would you like to send an update…? choose Yes.
3. Review the Meeting message and, if necessary, make changes.
4. On the toolbar, click the Send Update button.

To cancel a meeting:

1. On your Calendar, select the meeting.
2. On the toolbar, click the Delete button.
3. In the message box that says, *The attendees have not been notified...*, select an option button, and then choose OK.

To cancel your attendance at a meeting:

1. On your Calendar, double-click the meeting.
2. In the Meeting window, select the Decline voting button.

To schedule an event:

1. Invite colleagues and set a meeting time for the desired date(s).
2. In the Meeting message window, select the All day event check box.
3. In the Invited Event message window, complete the information and send the message.

To schedule a task:

1. In the Tasks folder, drag a task onto the Calendar shortcut on the Outlook Bar.

   or
1. In the Calendar folder, select a time slot, and then drag a task onto the Calendar.
2. If necessary, in the Appointment window, in the Start time area, from the drop-down Date Navigator, select a date, and from the time drop-down list, select a time.
3. If necessary, in the End time area, from the drop-down Date Navigator, select a date, and from the time drop-down list, select a time.
4. On the toolbar, click the Save and Close button.

To regenerate a task:

1. Select a task and open the Task window.

   or
1. Create a task but do not close the Task window.
2. On the toolbar, click the Recurrence button.
3. In the Task Recurrence dialog box, in the Recurrence pattern area, select a time period option button, and then select the Regenerate new task option button and the numeral in the time period text box and enter the appropriate figure.
4. Choose OK.
5. In the Task window, on the toolbar, click the Save and Close button.

To assign a new task to someone else:

1. From the Actions menu, choose New Task Request.
2. In the Task message window, address the request, enter a subject, and fill in appropriate information.
3. Make sure the *Keep an updated copy of this Task on my Task List* check box is selected.
4. Make sure the *Send me a status report when this Task is complete* check box is selected.
5. Send the message.

To assign a previously created task to someone else:

1. Double-click the task.
2. In the Task window, on the toolbar, click the Assign Task button.
3. In the Task message window, address the request, enter a subject, and fill in appropriate information.
4. Make sure the *Keep an updated copy of this Task on my Task List* check box is selected.
5. Make sure the *Send me a status report when this Task is complete* check box is selected.
6. Send the message.

To accept or decline a task request:

1. In the task request message, on the toolbar, click the Accept or the Decline button.
2. In the message box, select the *Send the response now* option button, and then choose OK.
   or
2. In the message box, select the *Edit the response before sending* option button, and then choose OK.
3. If necessary, in the message window message area, type your response, and then send the message.

To reassign a task request:

1. In the task request message, on the toolbar, click the Assign Task button.
2. In the Task message window, address the task to the assignee.
3. In the message area, type a message.
4. If desired, select the *Keep an updated copy of this task on my task list* check box.
5. If desired, select the *Send me a status report when this task is complete* check box.
6. Send the message.

To reclaim ownership of a declined task:

1. In the message that contains the declined task request, from the Actions menu, choose Return to Task List.
2. In the Task window, on the toolbar, click the Save and Close button.

To create a new item from an existing one:

1. From an item list, drag an item onto the shortcut on the Outlook Bar.
2. In the folder window, if necessary, add more details.
3. On the toolbar, click the Save and Close button.

Section 10 Self-Check Exercise

1. Schedule the Dessert Bake Off as a three-day event beginning six months from today.

2. Invite your workgroup partners to a four-hour meeting to judge the Dessert Bake Off entries at 10:00 A.M., according to the schedule in Table 10-5.

Student	Date
Student1	first day of contest
Student2	second day of contest
Student3	last day of contest

Table 10-5: *The Workgroup Judging Schedule*

3. From the Contacts folder, invite your mail partner to judge the contest, too.

4. Accept the invitations you receive from your workgroup partners and decline the invitation from your mail partner.

5. Review the meeting information you have received concerning the meeting you originated.

6. Reschedule the meeting for one hour later, and notify everyone of the change. Then cancel the meeting, again notifying everyone.

7. Add these tasks to your task list:

   - Design a display ad for Elena to place in the Sunday issue of the *Times-Picayune.*

   - Have breakfast at Brennan's.

   - Write a mini review as Elena's listing for the New Orleans edition of the *Gregarious Gourmet.*

8. Schedule designing the display ad for your first free time tomorrow.

9. Mark the breakfast at Brennan's task complete and regenerate it for four months after completion.

10. Assign writing the mini review to your mail partner. Tell your partner to complete the task within one week. Also assign your partner to locate additional places where Elena can advertise nationally.

11. Accept your partner's assignment to write the mini review but reassign the assignment to locate advertisers to one of your workgroup members.

12. Reclaim ownership of the task to write the mini review.

13. Change your notes into tasks.

14. Schedule at any available times the tasks you just created from your notes.

15. Create a new message from a contact card and then close the message window without sending or saving the message.

Section 11

Working with Templates and Forms

- Working with Templates
- Utilizing Forms

Section Skills and Their Importance

In the following section you will learn to:

- **Work with templates**
  Outlook provides several message templates you can use again and again. You simply retrieve the template and add current information. Outlook provides built-in templates and lets you create more on your own.

- **Utilize forms**
  The Outlook dialog boxes and windows with which you have been working are standard Outlook forms. These forms, as well as any you download from the Web can be edited. You can then open and use these forms.

Working with Templates

Many messages you send have the same format and style time after time. For example, you might use e-mail to send out memos. Instead of creating the message from scratch each time you need to send a new one, you can create a message with a standard style and format once and save it as a *template.*

A template is a reusable document that defines the structure and layout of the specific type of message. It should include common elements that appear within the message in specific locations or at repeated intervals. Such elements might include a company logo, repeating titles and text, and text styles, to name a few.

You can modify a message based on a template exactly the same way that you would modify a message you create from scratch. You change the message resulting from the template and not the template itself. Changes you make in this message do not affect future messages you create with the template. Only changes you make to the template itself appear in future publications.

Outlook comes with built-in templates you can use to give your messages flair. You can modify these templates or design your own. Outlook templates have the **.oft** extension.

Using a Template

Most built-in Outlook templates simulate decorative stationery. The While you were out template simulates the popular pink memo you see in many offices. You can use these templates for your informal correspondence and to get ideas to produce your own custom-designed templates. Once you create a template of your own, you can use it in exactly the same way as using a built-in template. You select templates in the Choose Form dialog box, shown in Figure 11-1.

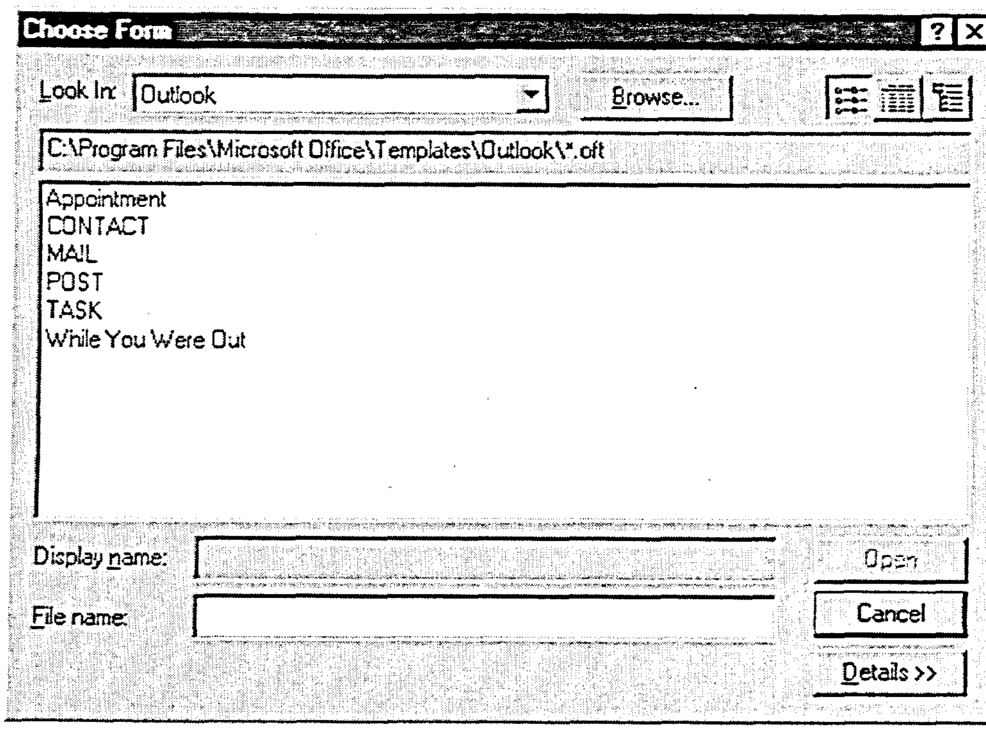


Figure 11-1: *The Choose Form Dialog Box*

METHOD

To use a template:

1. From the File menu, choose New.
2. From the submenu, choose Choose Form.
3. In the Choose Form dialog box, click on the down arrow on the Look in drop-down box and choose Templates in File System.
4. If a message appears stating Directory change failed. Defaulting to previous directory, click on OK.
5. If the active folder is not C:\Program Files\Microsoft Office\Templates\Outlook then use the Browse button to point to point to this folder.
6. Choose a template and click on the Open button.
7. Compose and send the message.

EXERCISE

In the following exercise, you will use a template.

1.	Open the Inbox	
2.	From the File menu, choose New	*The New submenu appears.*
3.	Click Choose Form	*The Choose Form dialog box appears.*
4.	In the Choose Form dialog box, click on the down arrow on the Look in drop-down box and choose Templates in File System.	*The Templates in File System page appears.*
5.	If a message appears stating Directory change failed. Defaulting to previous directory, click on OK.	
6.	If the active folder is not C:\Program Files\Microsoft Office\Templates\Outlook then use the Browse button to point to point to this folder.	
7.	Select **While You Were Out.oft**	
8.	Choose Open	*The template appears with a design in the left margin.*
9.	Close the template without sending a message	
10.	From the File menu, choose New	*The New submenu appears.*
11.	Choose Choose Form	*The Choose Form dialog box appears.*
12.	In the Choose Form dialog box, click on the down arrow on the Look in drop-down box and choose Templates in File System.	*The Templates in File System page appears.*

13. If a message appears stating Directory change failed. Defaulting to previous directory, click on OK.

14. If the active folder is not C:\Program Files\Microsoft Office\Templates\Outlook then use the Browse button to point to point to this folder.

15. Select **Mail.oft**

16. Choose Open

    The template appears with a design in the left margin.

17. Address the template to your partner, add a friendly message, and then send the message

END

Creating a Template

To create a template, you must first define the layout and the repeating elements. When you save this message as a template, Outlook automatically saves it in the Template directory. All message templates you create appear in the Choose Form dialog box under Templates in File System in the Look in drop-down list box.

METHOD

To create a template:

1. Compose the message you want to use as a template.
2. From the File menu, choose Save As.
3. In the File name text box, type a name for the template.
4. In the Save as type drop-down list box, select Outlook template (*.oft).
5. Make sure the Save list displays the drive and path containing the Outlook templates.
6. Choose Save.

EXERCISE

In the following exercise, you will create a template and then use it.

1. Open a new message
2. In the message area, type **Memo** and then press **ENTER** twice
3. Format the word *Memo* in Arial, 16 points, bold and italic, and center the text
4. From the File menu, choose Save As — *The Save As dialog box appears.*
5. In the File name text box, type **Memo**
6. From the Save as type drop-down list, select Outlook Template (*.oft)

7.	Make sure the Save list displays the drive and path containing the Outlook templates	
8.	Choose Save	*The template is saved.*
9.	Close the template	
10.	From the File menu, choose New / Choose Form	*The Choose Form dialog box appears*
11.	In the Choose Form dialog box, click on the down arrow on the Look in drop-down box and choose Templates in File System.	
12.	If a message appears stating Directory change failed. Defaulting to previous directory, click on OK.	
13.	If the active folder is not C:\Program Files\Microsoft Office\Templates\Outlook then use the Browse button to point to point to this folder.	
14.	Select **Memo.oft**	*The template opens. Only the word **Memo** appears. You can reuse the template to send another message.*
15.	Address the message to your partner and in the message area, below the word *Memo,* type **All servers should try on costumes by Monday and send the message**	

END

Utilizing Forms

A *form* is a fill-in-the-blank item that helps you enter and view information in an orderly way. You are already familiar with Outlook forms because you have used Message windows, Contact windows, Task windows, Appointment windows, Outlook templates, dialog boxes, and so forth.

Outlook has two types of forms. The first is a message form, such as the Vacation Request or the While You Were Out form, that you use to send information to others. The second is a post form, such as the Classified Ad, that you display in a public folder on the network. Post forms are similar to message forms in that they provide an area in which the viewer can respond to the originator.

Installing Sample Forms

From time to time, Microsoft provides more forms on its Free Stuff page on the World Wide Web. You can access this page directly from the Help menu, Microsoft on the Web, Microsoft Office Home Page.

Using a Form

Once you have installed the free Microsoft forms on your workstation, you can open them. To use company forms from your network, the network administrator must make them available. Such forms as the Vacation Request form and the While You Were Out form, shown in Figure 11-2, are ready to use as is; but other forms, such as the Classified Ads form, just let you see how you can use a form. You cannot send them to your network workgroup unless you have administrator privileges to put them into the *Organization Forms Library*. This library is where your network administrator makes forms available for network-wide use.

When you receive a form, you see it as a form only if you have the same form loaded in your Outlook folder. Otherwise, the form arrives as an ordinary message.

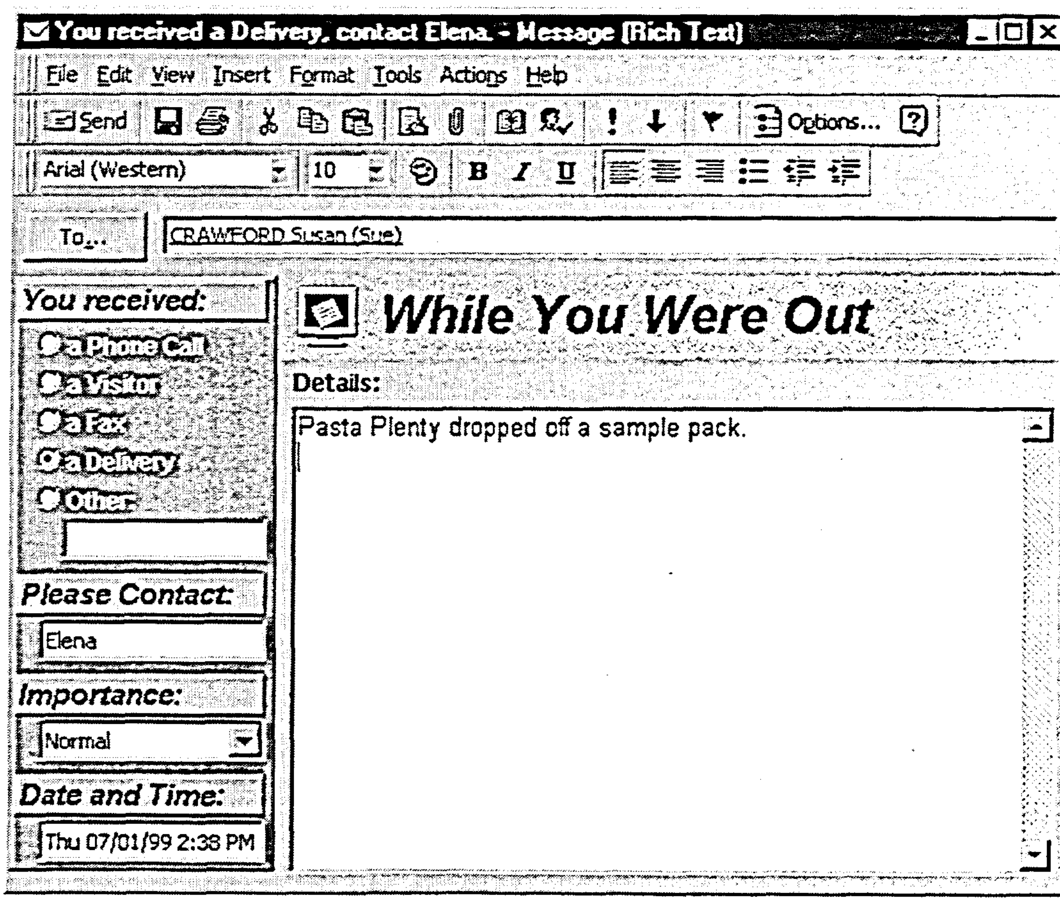


Figure 11-2: *The While You Were Out Form*

METHOD

To use a form:

1. From the File menu, choose New.
2. From the New submenu, choose Choose Form.
3. In the New Form dialog box, from the drop-down list box, make sure Personal Forms Library is selected.
4. From the list box, select the form, and then choose OK.
5. In the New [Sample Form] window, enter the information.
6. If necessary, on the toolbar, click the Send button.

Creating a Form

After you work extensively with forms, you might want to restructure or enhance an existing form or create a new form from scratch to meet your office needs. You can modify an existing form and save it as a file.

Modifying an Existing Form

The simplest way to create your own form is to modify an existing form. You can add custom pages, choosing the fields you want on each page. Outlook's AutoLayout feature automatically sizes each field. You add *controls* to the page using the Toolbox, shown in Figure 11-3, which you access by clicking the Control Toolbox button on the Form toolbar, shown in Figure 11-4. A control is a graphical object within a form that lets you enter or view data or accomplish a task, such as running a macro. Outlook uses controls as the basis for building forms.

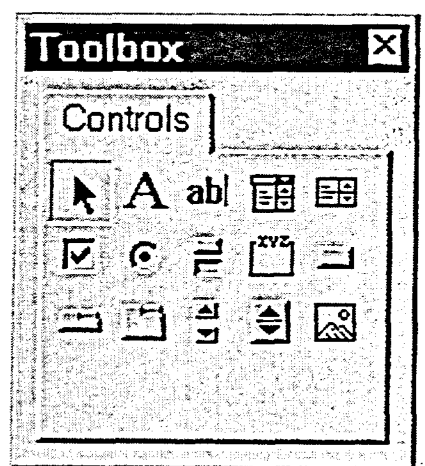


Figure 11-3: *The Toolbox*

Figure 11-4: *The Control Toolbox Button*

Table 11-1 describes the functions of the controls.

Tool button	Tool name	Function
	Select Objects	Selects, sizes, moves, and edits controls.
	Label	Creates an unattached text label
	TextBox	Creates a text box control.
	ComboBox	Creates a combo box control in which you can select from a list of values or enter a value.
	ListBox	Creates a list box control in which you can select from a list of values.
	CheckBox	Creates a check box control.
	OptionButton	Creates an option button control.
	ToggleButton	Creates a toggle button control by which a yes/no value can be selected.
	Frame	Creates a functional and visual control group.
	CommandButton	Creates a command button that you can use to activate a macro or module.
	TabStrip	Groups related controls.
	MultiPage	Presents multiple pages as a single set.
	ScrollBar	Sets the value of another control based on the position of the scroll box.
	SpinButton	Creates a command button that lets you increase or decrease a number.
	Image	Creates a frame in which you can display an unchanging image.

Table 11-1: *Toolbox Tool Functions*

Figure 11-5 shows the Contact (Design) window, which is the Contact window with five customizable additional pages. Page 2 of this form appears with modifications. Parentheses around page names on the tabs indicate that those pages are hidden.

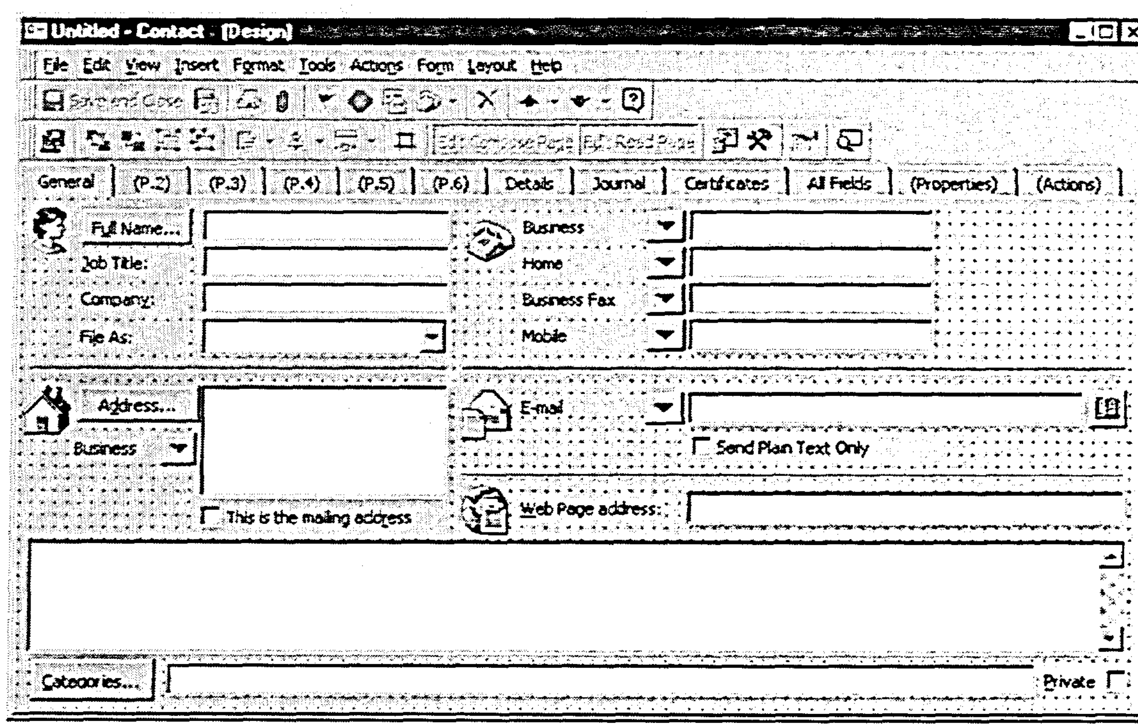


Figure 11-5: *The Contact (Design) Window*

METHOD

To add pages to an existing form:

1. Open the form you want to modify.
2. From the Tools menu, choose Forms, choose Design This Form.
3. Select a page tab.
4. From the Form menu, choose Rename Page.
5. In the Rename Page dialog box, in the Page name text box, type a page name, and then choose OK.

To add fields to a new page:

1. From the Field Chooser dialog box, drag a field onto the new page.
   or
1. In the Field Chooser dialog box, choose New, and in the New Field dialog box, fill in the text boxes and then choose OK.

To add controls to a new page:

1. On the toolbar, click the Control Toolbox button, and then, from the Toolbox, drag a control and its label area to the page.
2. Click a label area and then click it again; then type the label into the label area.

To hide a page:

1. Select the page tab, and then, from the Form menu, choose Display This Page to deselect the check.

To set properties for the form:

1. Select the (Properties) tab, and on the Properties page, in the Form Caption text box, type a name for the form; to be able to send a copy of the form in e-mail, select the *Send form definition with item* check box; and then select the other options you want.

To publish a form:

1. From the Tools menu, choose Forms / Publish this form.
2. In the Look In field, choose Personal Forms Library.
3. Enter a Display Name.
4. Choose Publish.

To open a new form:

1. From the File menu, choose New / Choose Form
2. From the Look In field, choose Personal Forms Library.
3. Select the form to open.
4. Choose Open.

EXERCISE

In the following exercise, you will modify an existing form.

1.	Open the Contacts folder	
2.	Open a New Contact window	
3.	From the Tools menu, choose Forms, Design This Form	*The Contact (Design) window appears.*
4.	Select the (P.2) tab	*(P.2), including the Field Chooser dialog box, appears.*
5.	From the Field Chooser dialog box, drag Assistant's Phone onto the upper left part of the page	*The label and a text box are placed on the page. The parentheses disappear from the page name, and the page becomes a visible part of the form.*
6.	From the Field Chooser dialog box, drag Pager to a position just below Assistant's Phone	*The label and a text box are placed on the page.*
7.	From the Form menu, choose Rename Page	*The Rename Page dialog box appears.*
8.	In the Page text box, type **Additional Info** and then choose OK	*The page name appears on the tab.*
9.	Click the Control Toolbox button	*The Toolbox appears.*
10.	Drag the Toolbox to the lower left corner of the screen	
11.	Drag the option button onto the grid twice	*Two option buttons with label areas appear.*
12.	Drag the option buttons and their label areas to the left to align them with the other items on the page	
13.	Click the first option button label area, and then click it again	*An area in which you can type a label appears.*

14. Type **Always call assistant before using pager number**

Part of your typing is hidden because it is too long for the label area.

15. Position the mouse pointer over the center right selection handle, and, when the pointer becomes a double-headed arrow, drag the label area to the right about halfway across the page

Your typing fits into the label area.

16. From the Tools menu, choose Forms / Publish this form

17. From the Look In field, choose Personal Forms Library

18. Enter **New Contact** in the Display Name field

19. Click Publish

20. Close the form without saving changes

21. From the File menu, choose New / Choose Form

22. Choose Personal Forms Library

23. Select **New Contact** and choose Open

24. Enter a name for the new contact, a job title and a company name

25. Click the Additional Info page

26. Enter the Assistant's phone number, a Pager number and click the Always call assistant before using pager number option

27. Save and close the contact

END

Section 11 Summary

To use a template:

1. From the File menu, choose New.
2. From the submenu, choose Choose Form.
3. In the Choose Form dialog box, click on the down arrow on the Look in drop-down box and choose Templates in File System.
4. If a message appears stating Directory change failed. Defaulting to previous directory, click on OK.
5. If the active folder is not C:\Program Files\Microsoft Office\Templates\Outlook then use the Browse button to point to point to this folder.
6. Choose a template and click on the Open button.
7. Compose and send the message.

To create a template:

1. Compose the message you want to use as a template.
2. From the File menu, choose Save As.
3. In the File name text box, type a name for the template.
4. In the Save as type drop-down list box, select Outlook template (*.oft).
5. Make sure the Save list displays the drive and path containing the Outlook templates.
6. Choose Save.

To use a form:

1. From the File menu, choose New.
2. From the New submenu, choose Choose Form.
3. In the New Form dialog box, from the drop-down list box, make sure Personal Forms is selected.
4. From the list box, select the form, and then choose OK.
5. In the New [Sample Form] window, enter the information.
6. If necessary, on the toolbar, click the Send button.

To add pages to an existing form:

1. Open the form you want to modify.
2. On the Tools menu, choose Design Outlook Form.
3. Select a page tab.
4. From the Form menu, choose Rename Page.
5. In the Rename Page dialog box, in the Page name text box, type a page name, and then choose OK.

To add fields to a new page:

1. From the Field Chooser dialog box, drag a field onto the new page.

or

1. In the Field Chooser dialog box, choose New, and in the New Field dialog box, fill in the text boxes and then choose OK.

To add controls to a new page:

1. On the toolbar, click the Control Toolbox button, and then, from the Toolbox, drag a control and its label area to the page.
2. Click a label area and then click it again; then type the label into the label area.

To hide a page:

1. Select the page tab, and then, from the Form menu, choose Display This Page to deselect the check.

To set properties for the form:

1. Select the (Properties) tab, and on the Properties page, in the Form Caption text box, type a name for the form; to be able to send a copy of the form in e-mail, select the *Save form definition with item* check box; and then select the other options you want.

To save a form in the open file folder:

1. From the File menu, choose Save.

To save a form as a file or as a template:

1. From the File menu, choose Save As.
2. In the Save As dialog box, in the Save in box, select the folder.
3. In the File name combo box, enter a name.
4. From the Save as type drop-down list, select a file type.
5. Choose Save.

To publish a form:

1. From the Tools menu, choose Forms / Publish this form.
2. In the Look In field, choose Personal Forms Library.
3. Enter a Display Name.
4. Choose Publish.

To open a new form:

1. From the File menu, choose New / Choose Form
2. From the Look In field, choose Personal Forms Library.
3. Select the form to open.
4. Choose Open.

Section 11 *Self-Check Exercise*

1. Send your e-mail partner a message using the While you Were Out template. Choose a Fax under the You Received heading and type the message **I have the fax you were expecting, please see me** in the Details window.

2. Create a new message template. First, create a new message, in the subject text box type **Staff Schedule, Week of**. In the message area, create a table using the Tab key with the headings shown in Table 11-2. Save the template as Staff Schedule.

Employee	Mon	Tue	Wed	Thur	Fri	Sat	Sun
Baptiste							
Claire							
Valerie							
Charlotte							

Table 11-2: *Staff Schedule Template Data*

3. Use the Staff Schedule template to send your e-mail partner the schedule for next week, using the data shown in Table 11-3.

Employee	Mon	Tue	Wed	Thur	Fri	Sat	Sun
Baptiste	2-8	2-8		2-10	4-12	4-12	2-8
Claire		5-10	5-10	5-8	5-10	3-10	
Valerie						10-6	10-6
Charlotte	4-8	4-8	4-8			2-10	2-10

Table 11-3: *Staff Schedule for Next Week*

Glossary

address books Address lists your network administrator sets up that include the names and corresponding e-mail addresses of everyone on your network. See Personal Address Book.

address card All information stored about a contact. Similar to a business card in a rotary file.

aging period The time interval from when data is first entered in an Outlook folder until it is automatically stored in an archive.

appointment An activity scheduled on your Calendar that does not involve anyone else.

appointment handle The blue borders at the top and the bottom of a selected appointment that allow you to changethe appointment beginning and ending times.

archive To store out-of-date Outlook items away from the main Outlook data folder.

ASCII The American Standard Code for Information Interchange.

AutoComplete A Microsoft feature that displays the word you are probably tping. If the word displayed is correct, press Enter to complete the typing.

AutoCorrect A Microsoft feature that automatically places phone calls from your computer.

AutoDate A Microsoft feature that lets you enter a time or a date as a word or phrase that Outlook then translates into a date. For example, if you type Halloween, Outlook changes the word to 10/31/yyyy, where yyyy is the year in which Halloween next occurs.

AutoText A Microsoft feature that lets you add words to you AutoComplete tip database.

category A keyword or phrase that helps you sort and find data.

contact list Your personal address book, including names, addresses, phone numbers, notes, and other information.

control A graphical object within a form that lets you enter or view data or accomplish a task.

Date Navigator Displays the calendar and enables you to go to desired dates.

edit Insert, delete, and replace text.

event A day on which you observe or celebrate something, such as a birthday or an anniversary, while conducting business as usual.

filter Display a specified subset of messages, appointments, contacts, tasks, notes,or journal entries.

Folder Banner The title bar at the top of the information viewer.

folder list The folder tree in which you create new Outlook folders, move data from folder to folder, archive data,delete and recover data, sort data, and find data.

form A fill-in -the-blank item that helps you enter and view information in an orderly way.

group address A unique name that references a group of Outlook users.

hyperlink When clicked, jumps from a web page address in a message to the web page on the Internet.

information viewer The pane that displays the active Outlook folder.

meeting An activity scheduled on your Calendar that involves other people and can also involve resources.

message list All messges in a Mail subfolder.

move handle The vertical colored line to the left of an appointment that lets you move the appointment

network A group of two or more computers which are physically connected. The network allows you to send information to other computers and receive information from other computers.

Office Assistant This on-screen helper can provide tips and help you search for answers.

Organization Forms Library Where your network administrator makes forms available for network-wide use.

Outlook Bar The Window element that contains shortcuts to Outlook's features and folders.

Personal Address Book An address list you set up that includes the names or aliases and corresponding e-mail addresses of people with whom you correspond frequently. See address books.

Personal Forms Library Where you store forms you are not sharing.

recurring appointment An appointment that occurs regularly, such as a biweekly day off in a flex work schedule.

recurring task A task that occurs regularly, such as picking up your paycheck every other Friday.

resource A person, location, or piece of equipment.

ScreenTip Context-sensitive help.

shortcut Icons on the Outlook Bar that store the folder location and provide access to Outlook folders.

synchronize To update network folders with changes you have made offline and to update offline folders with changes you have made online so that the folders are identical.

task A specific duty that you must perform and usually complete within a specific time frame.

TaskPad The area on the Calendar that displays your tasks.

template A reusable message with a defined structure and layout.

tentative appointment An appointment that reserves a time slot in your Calendar but might not take place.

user name The e-mail identification name assigned to each user on a network and used to address a message. Can be a full e-mail address or an alias that substitutes for the full address.

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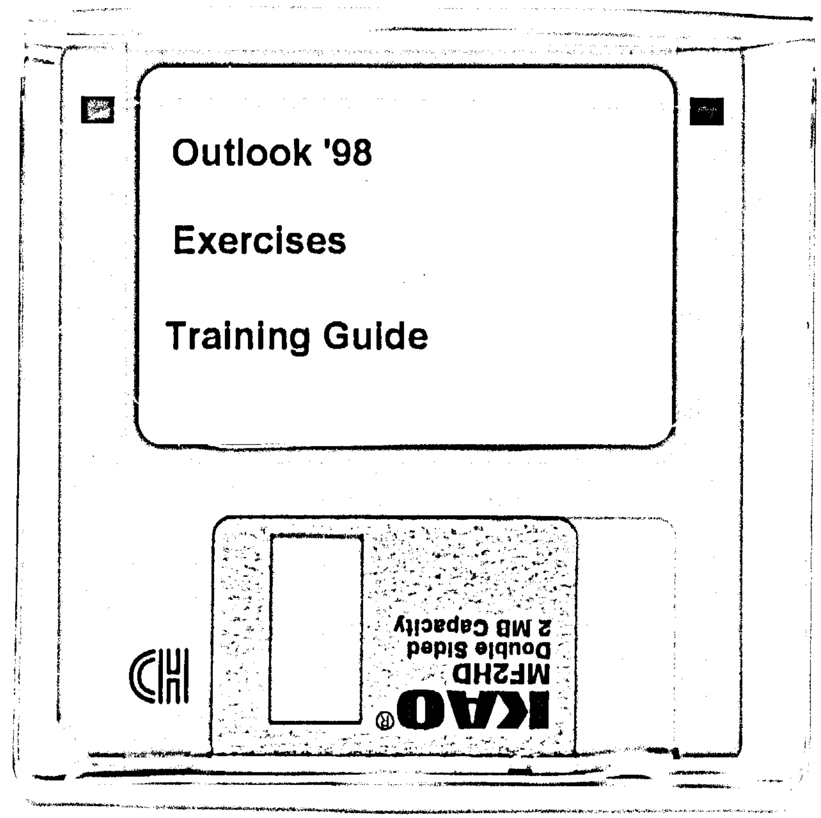
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