



Time and Contact Management Using Outlook: Outlook Productivity

Greg Creech

Using Outlook for our time and contact management is an excellent way of staying organized and productive. This session encompasses many shortcuts, tips and tricks, and tailoring Outlook's Mail, Calendar, Contacts, and Tasks to suit your needs. This training helps you in efficiency and providing excellent service to your contacts,

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Oops! and Legal Stuff

While I have made every effort to ensure the accuracy of this document, including grammar and instructions, I make mistakes. (Surprise!) If you find an error or want to provide constructive feedback, please contact me. Thank you! Enjoy!

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A few items you should know about me:

- ✓ International Association of Administrative Professionals Business Partner and Member
- ✓ American Society of Training and Development Member
- ✓ Society of Human Resources Management Member
- ✓ Microsoft Office User Specialist Certification – Master Expert and Instructor
- ✓ CompTIA Certified Technical Trainer +
- ✓ A+ Certified Systems Technician through CompTIA
- ✓ Microsoft Certified Technical Trainer
- ✓ 2007 Southern Region University Continuing Education Association Award Winner for the Top Non-Credit Programs
- ✓ 2009 Southern Region Association of Continuing Higher Education's Faculty Award winner for my work at Emory University's Center for Lifelong Learning
- ✓ Former National Speakers Association Member

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IAAP and Greg Creech

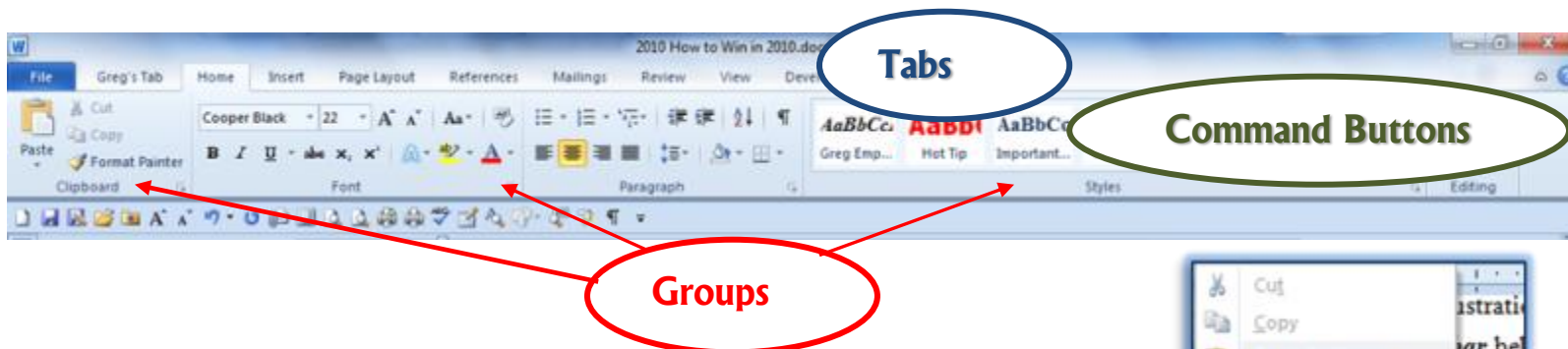
On January 5, 1981, I entered the world of being an administrative professional as the only male Steno Clerk in Columbia, SC at Southern Bell. As my manager, Becky Davis, introduced me to all of the women, one funny woman exclaimed: “Well, there goes the steno pool; they let a rooster in the hen house!” Later in the day, I used an IBM Selectric typewriter to type a proposal. As I typed, I noticed the silence in the room and looked up to see everyone staring at me. The funny woman said: “I’ve never seen a man that could type like that. Who would’ve thought.” I could type 70 WPM with no mistakes. I worked in Sales and Marketing at AT&T in many clerical, administrative, and operations management positions. My longest responsibility for over 10 years was as a Compensation Manager in Sales and Marketing for various sales organizations, and in 1998, I took an early retirement buy out package as an Operations Manager. AT&T supported my comedy, musical, and motivational presentations internally and externally, too, so I had the best of both worlds: administrative position and entertaining presenter. I continue to enjoy at&t as a customer and supplier as I train on and develop Access databases for at&t.

Since 1998, I have pursued my passion and love of technology, education, comedy/humor, music, and administration. In April 2006 for Administrative Professional Day, I presented my musical, humorous stress management speech at Midlands Technical College with over 650 admins in my home town of Columbia, SC. Four months later, I and Mary Stuckey, my neighbor, were at a neighborhood meeting and she informed me that she was being installed as President – Georgia Division of IAAP. Mary and I have been neighbors for 9 years at that point and we never knew of our administrative connections. I told her about my presentations and programs. In November 2006 at an IAAP Educational Seminar in Macon, GA I presented my humorous, musical presentation on business communication, stress management, and career development entitled “SMILE”. I joined IAAP in 2007. The presentation was a hit and IAAP blesses me frequently allowing me to present at chapter meetings, conferences, and other events. Being included on this Louisville Summit conference is an absolute dream come true for me and I owe much thanks to my sisters in the Georgia and South Carolina chapters for all of the persistent and consistent recommendations, referrals, prayers, and compliments since the beginning. I hope you enjoy my presentation as much as I enjoy presenting it.

Welcome!

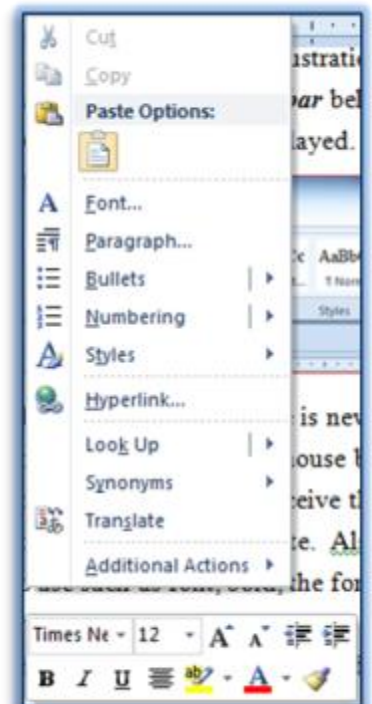
The New Interface

One of the best new features of *Office* is the new *user interface* including the *Quick Access Toolbar, Tabs, and Ribbon*. Microsoft calls this type of interface a results-oriented interface and I must agree – you truly will get to your desired results, effects, and functionality with less time and minimized frustrations – for the most part. The number of *dialogue boxes* has decreased and *Task Panes* are still around to assist you. The good old toolbars, such as Standard and Formatting, that us old-timers have used since the early 1990's are gone, except for one – the new *Quick Access toolbar*. Without a doubt using the new Office Suite will increase your productivity and make getting to functions much easier and with fewer clicks and less frustration. The *Home Tab* in *Word 2010* displays here with the *Quick Access Toolbar* below the Ribbon and above the Ruler



and the *Home Tab's Groups and Command Buttons* displayed.

Besides the increase functionality using the *tabs* and ribbon, there is new power in using the shortcut menus with “right clicking” or using the secondary mouse button. When you “right click” or use your secondary mouse button you still receive the *Shortcut menu* including some of your favorite commands, such as copy and paste. Also you receive a *Mini Toolbar* containing favorite commands to use such as font, bold, the format painter and other often used commands. This is another time saving feature for applying formatting to selected areas of your document, spreadsheet, presentation and other Office files.



There is the new scrolling **Zoom**, replacing the **Zoom box**, in the status bar of all applications that changes your view as you scroll through your percentages. A picture of the new scrolling zoom is at right and allows you to see your changes in “real time” rather than guessing the percentage you need.



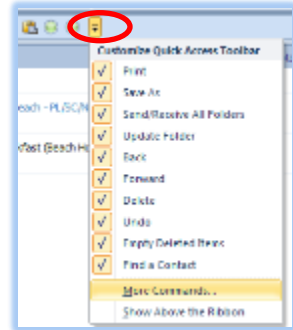
Microsoft Office offers a preview of your formatting, too, such as when you select your text and scroll through the fonts or font size the application will show you the effect changes before you make your final click or selection. Microsoft calls this feature **Live Preview** and saves a lot of time.

We will examine these **new user interface features** and new ways to getting to old functionality, such as how the tabs and ribbons work in using popular formatting options for Outlook. We will look at common features across the, such as the **return of File in Office 2010/2013, Customizing the Ribbon**, and **the Quick Access toolbar**. We will examine some of the new functionality in Outlook using the new interface.

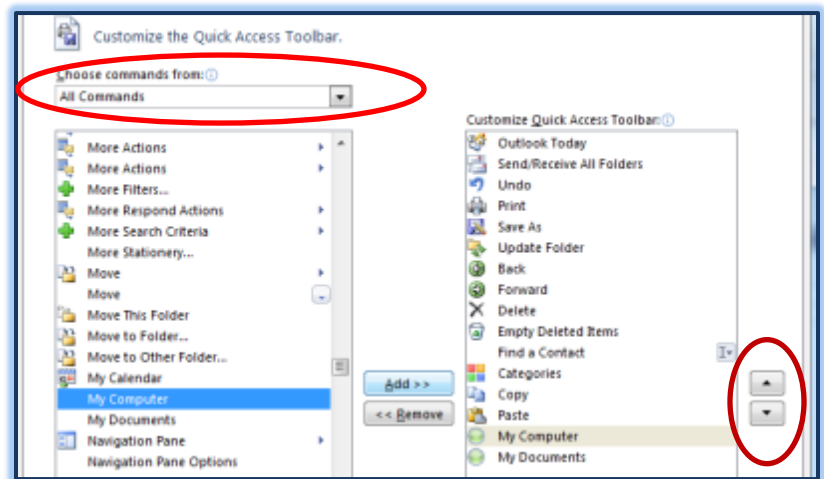
Quick! Access the Toolbar

The Quick Access Toolbar in Outlook

1. With Outlook open, Click the Quick Access Toolbar's Option arrow and add the buttons from the shortcut menu as displayed here. The Quick Access Toolbar is usually in the upper left corner of your screen.
2. Using the Quick Access Toolbar's options pane add the commands by clicking the check box and the command appears on your toolbar. You'll have to keep opening the menu each time you add a command. After adding the buttons from the shortcut menu, Click the arrow again and at the Customize Quick Access Toolbar click the More Commands... option.



We will add your favorite Outlook buttons using the Popular Commands item in the Choose commands from: box and then use the All Commands item in the Choose commands from box. Using the Popular and the All Commands items, add your favorite button by selecting the button on the left area of your screen and click the Add button to include the button on your toolbar. You may double click the button you want to add, too, and this will add the selected button to your Quick Access Toolbar.



Using the Arrow keys at the right of your Customize Quick Access Toolbar pane, you may move the selected button to a new location. I have the move arrows circled above.

Here are some of my favorite commands to add to and rearrange on my Outlook Quick Access Toolbar:

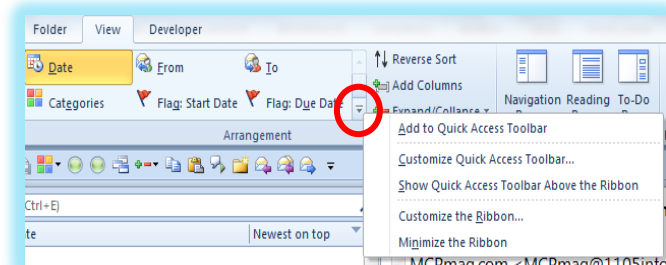
- ✓ Outlook Today
- ✓ Categories
- ✓ My Computer
- ✓ My Documents
- ✓ Open in New Window
- ✓ Expand/Collapse Groups
- ✓ Copy
- ✓ Paste
- ✓ Next 7 Days (Calendar view)
- ✓ Monthly View (Calendar view)
- ✓ Speak

Click Ok.

Now, that we have customized our Quick Access Toolbar it is time for us to customize our Ribbon with our own Tab – A Terrific New Feature in Office.

➤ Hot Tip! Outlook has several Quick Access Toolbars you will need to customize depending on the item, such as Contacts, Mail that you are using. The Quick Access Toolbar we customized carries across all of the main Outlook screens for the Outlook objects, but, like the Ribbon, changes when we create a new email, a new appointment, or a new contact. So, you will have plenty of practice adding your favorite button.

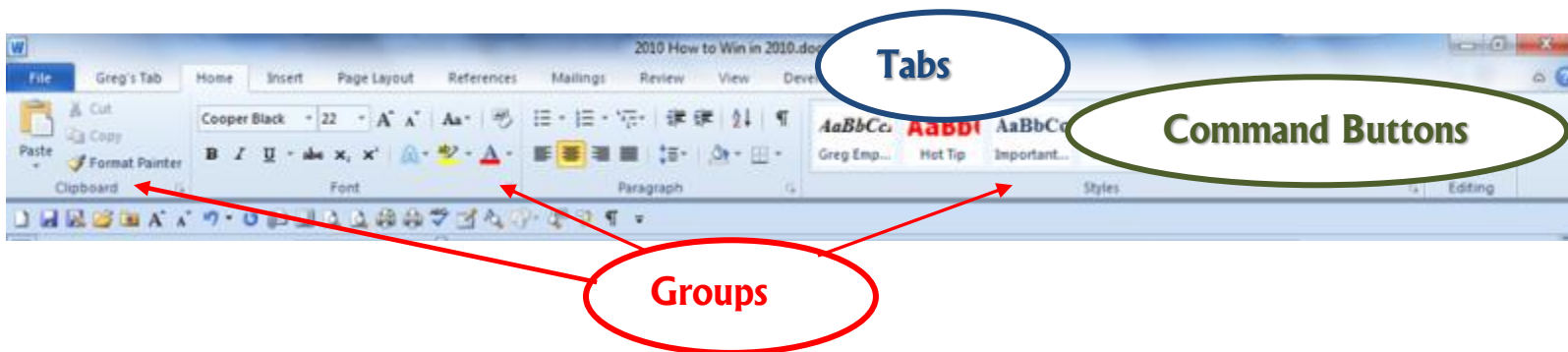
Another Hot Tip! You may add buttons to your Quick Access Toolbar by right clicking the button on your ribbon and from the menu choose Add to Quick Access Toolbar. I am adding my Arrange by menu to my Quick Access toolbar by having my Inbox open and from the



View Tab on the Ribbon right click the More arrow for Arrange by and from the menu clicking Add to Quick Access Toolbar. ➤

Productive Ribbon, but Where are the Bows?

The **Home Tab** appears below. The **Ribbon** is composed of **Tabs**, **Command Buttons** (aka Icons), and **Groups**. As you can see, the **Ribbon** is packed with Command buttons,



menu items, and are organized in a logical manner. However, getting accustomed to where your previous icons, menu items, and other shortcuts from previous versions of **Office** is a bit challenging. Here's an example of how my old habits in the applications are hard to change, and I bet you will experience the same. The **Views** in Word and PowerPoint have always been at the lower left corner of your screen – now the **Views** in Word and PowerPoint have moved to the left of the screen – a simple rearrangement, but I can't count the number of times I still go to the lower right part of my screen to change a view and then realize OOPS! the views have moved on me.

An Important Note 🏹 - *Your screen resolutions will affect the number of commands you may see in a group. The lower the resolution your computer is set the fewer commands you may see – the group will display an arrow for you to expand and view the commands. The higher the resolution the more commands you may view in a group without the need to expand the group. For example, with my screen resolution set at 800 x 600 my Editing Group required me to expand the group in order to view and use the commands. With my screen resolution set at 1024 X 768 my editing group displays the Find, Replace, and Select Commands. You may change your resolution settings using the Display Properties in Windows.*

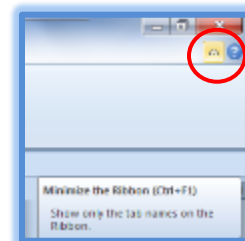
Microsoft's Office **Ribbon** is productive, beautiful, and combines our previous toolbars, menus, and task pane features in a much easier and a more powerful way of working with the applications. As a 25-year veteran of using these products, I got excited when we

moved from command menus to icons, now we can have the best of all of the worlds with ***The Ribbon***, especially the ability to customize ***the Ribbon*** in Office as we accomplished earlier. I think you are going to find the ***Ribbon*** a bit confusing at first. For me, old habits die hard and I had to accustom my life and work without the Menu bar and Standard/Formatting Toolbar. And the ***Live Preview Feature*** introduced in Office 2007 that displays your selected text's new format based on hovering your cursor over a style, font, or size "freaked" me out at first. However, once I worked with the new Ribbon and features that pop out of nowhere or are enhanced greatly, such as the new ***Mini Toolbar*** that appears with your ***Shortcut Menu*** when you right-click, I find it difficult to use previous versions of Office. The new version of Office is much easier to use and to teach than any other version, especially for our youth and those new to ***Microsoft's Office***. Here's two neat ways of increasing your productivity using ***the Ribbon***.

Two important and time saving Hot Tips for you in using the Ribbon and Tabs!

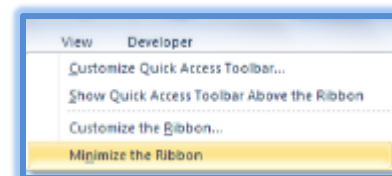
➤ **Hot Tip 1: Minimize the Ribbon! Four ways to minimize the Ribbon – First, the Ribbon takes up a lot of space on your screen. You may minimize the Ribbon and use it only when you click on a Tab.**

1. Office 2010 has the new Minimize Ribbon arrow at the top of your window next to the Help button. The Minimize the Ribbon button appears at right. With the Ribbon minimized the button becomes the Expand the Ribbon button.



2. To minimize the ribbon double click the active Tab's Name. Double clicking a tab expands/minimizes the ribbon, too.

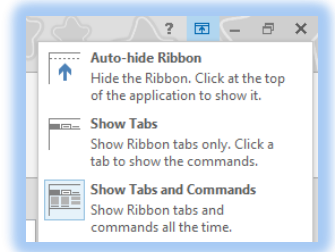
3. Right click on any tab or command button on the Ribbon and from the short cut menu choose Minimize the Ribbon at the bottom of the menu.



4. Keyboard shortcut of CTRL + F1 – when you press your CTRL (Control) and the F1 keys simultaneously on your keyboard the Office application minimizes and expands your Ribbon, too. ➤

Why minimize The Ribbon? The Ribbon takes a lot of space. With the Ribbon minimized you have more room in which to work on your file. With the Ribbon minimized, to use a tab, you click the tab and the Ribbon's tab expands for you to use the Command Buttons. After clicking the button you want and you click back into the body of your document, worksheet, or presentation the Ribbon minimizes again. This is similar to using the old Menu bar. The difference is the Menu bar was vertical and text oriented and the Ribbon is horizontal and more graphically oriented.

**Office 2013
Feature**



Office 2013 – New Feature: Outlook 2013 has the new Ribbon options button and menu as displayed here. You may use the Auto-hide feature and collapse and expand your ribbon from this menu. The shortcuts above work to collapse and expand the ribbon in 2013.

➤ Hot Tip 2: Second, if you have a scroll wheel/button on your mouse and the Ribbon is NOT minimized, you may scroll through the different tabs rather than clicking the tab. Moving your cursor to the Ribbon and rolling your scrolling button/wheel up or down changes the tabs for you! You must first click on a tab for this to work; otherwise, the application will scroll through your file – not the Ribbon. ➤

☹ **An Important Gotcha!** With the Ribbon minimized you cannot scroll through the Tabs as described above. You'll have to maximize the ribbon in order to scroll through your tabs and command items. ☹

Try these two shortcuts, I think you'll like using these two features in Office.

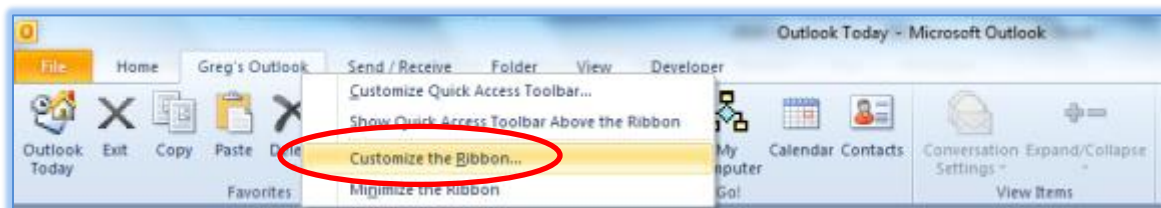
Customizing the Ribbon – Your Own Tab and Groups

One of the disadvantages of Office 2007 was the inability to customize the ribbon and add your favorite and popular command buttons to your own tab as you could create toolbars and add your icons in Office 2003 and its predecessors. With Office 2010/2013 you can create your own tab and groups then add your favorite command buttons. We'll build our own tab with often-used command buttons, now.

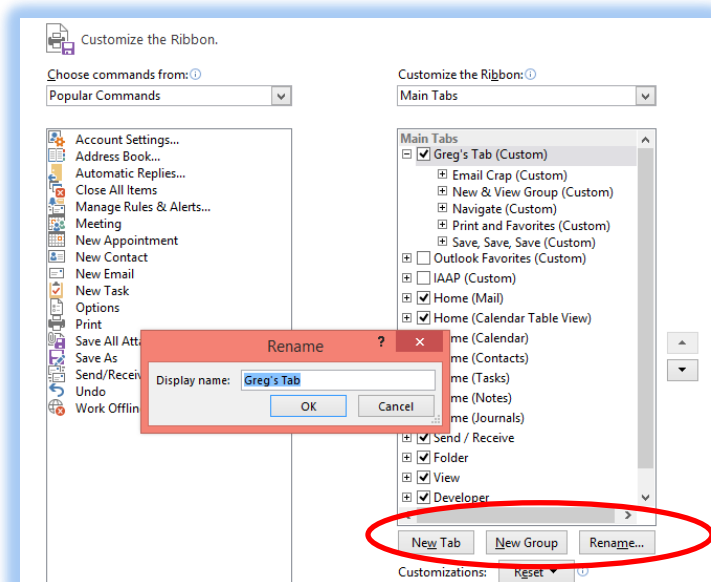
Outlook's Custom Tab

The process of creating and customizing your tab and groups in Outlook is the same as in Word and Excel only the type of commands that we want differ. We will create a tab and a group and add some of our favorite Outlook buttons to it.

- 1. Activate your Customize Ribbon pane in your Outlook Options by**

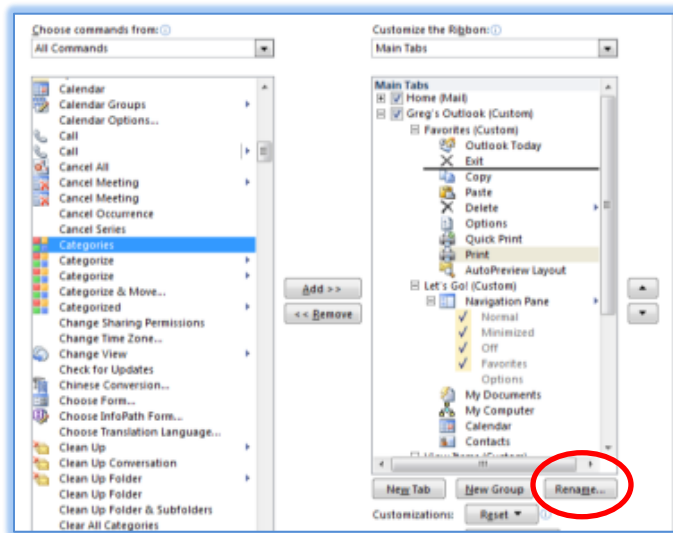


- right clicking on a Tab on the Ribbon and Clicking Customize the Ribbon from the shortcut menu as displayed here with my Custom Tab named Greg's Tab.**
- 2. Create a New Tab by Clicking the New Tab button at the bottom of the Customize the Ribbon pane and then rename**



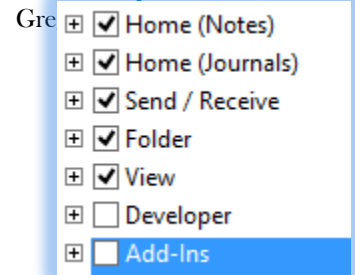
the tab – I am naming my tab - Greg's Tab.

3. Next create a New Group and rename the group. I have created a Favorites, Let's Go, and View Items groups.
4. Create and rename other groups if you wish.
5. Change your Choose commands from box to All Commands. Outlook alphabetically shows ALL of the available commands. I am adding the Categories button to my Favorites Group on my Tab by clicking and dragging the button from the left part of my screen to the right part of the pane illustrating my Tab and Groups. I am placing the button under Exit and above Copy.
6. Similar to the Quick Access Toolbar I add my Outlook Today, Copy, Paste, My Documents, My Computer, and other important and often used Outlook Commands. You should add the buttons and groups as you use Outlook and have your favorite commands in one place.
7. Also, I like changing my buttons especially for My Computer and My Documents. After adding the button, I select the button and then click the Rename button. While I can change the name of the button through the Display name box, I can change the picture or icon for the command, too. I am using the first button (the robot) for my button and I'm changing the button name to Greg's Computer. Click OK.





8. After customizing your tab, groups, and command buttons, Click OK. You have your own, productive Tab in Outlook to use in all of the objects and items in Outlook. You may click the check boxes next to the tab's name in the Customize Ribbon pane to display or not to display the tab in the Ribbon.

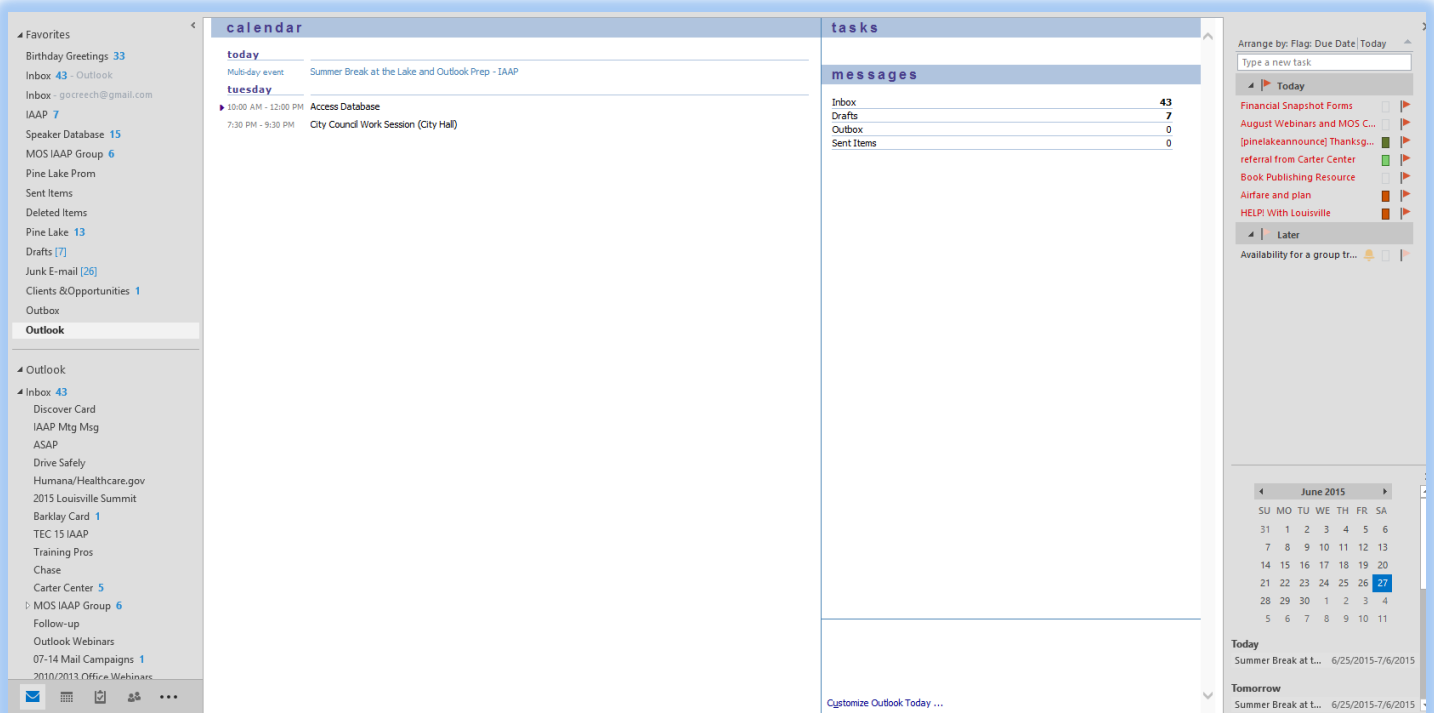


⊗ **An Important Gotcha! In Outlook, your custom tab will not display in some of the items, such as New Message, New Appointment, etc. and your Quick Access Toolbar changes, too.** ⊗

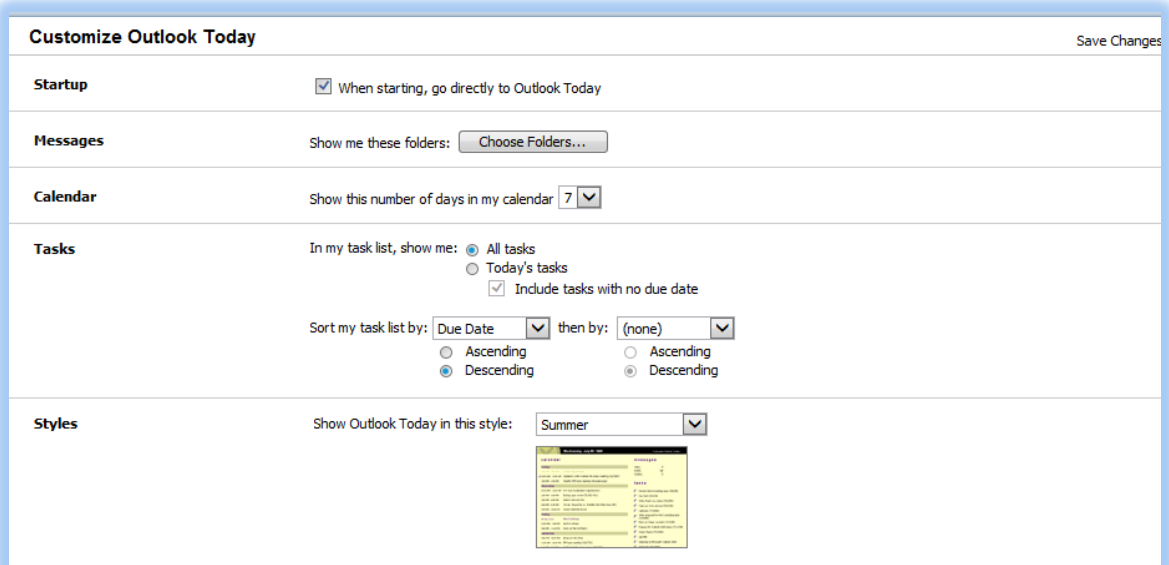
Outlook Today (Yesterday and Tomorrow)

Main Screen

Outlook features a nice tool entitled **Outlook Today**. The **Outlook Today** feature displays the **Outlook Navigation** bar, your **Calendar entries**, **Tasks**, and number of new messages in your common mailbox folders (**In**, **Out**, and **Drafts**). With **Outlook Today** automatically opened at startup, you may view your week or days ahead on your calendar and tasks to complete so **Outlook Today** is also Outlook Tomorrow and the Next Week. *Pictured below is my Outlook Today view with the different areas of my screen. My Navigation Pane and To-Do Bar are visible below, too. Outlook Today is the top level folder in Outlook's Navigation pane.*



Click on the **Customize Outlook Today** button on the **Outlook Today** screen to activate the pane pictured below; this pane allows you to tailor your **Outlook Today** screen.



Customize Outlook Today Save Changes

Startup ☒ When starting, go directly to Outlook Today

Messages Show me these folders: Choose Folders...


Calendar Show this number of days in my calendar: 7

Tasks In my task list, show me: ☒ All tasks ☐ Today's tasks ☒ Include tasks with no due date

Sort my task list by: Due Date then by: (none)

☐ Ascending ☒ Descending ☐ Ascending ☒ Descending

Styles Show Outlook Today in this style: Summer



This is one of the first areas of *Outlook* that you should view and set the items. As we examine each of *Outlook's* features, we will look at the many options associated with each object. For our *Outlook Today* customization, the items should be set as you wish.

Don't Hesitate, Let's Navigate!

The *Navigation Pane* is at the left area of your Outlook screen. This is a quick, easy, and powerful way to manage your Outlook objects and items. As the name suggests, you may quickly maneuver within all of the Outlook objects, such as *Calendar* and *Contacts*, and to *Folders* within the objects using the *Navigation Pane*. You may right click on a folder and receive the shortcut menu pictured below. I am displaying the cascading menu after I right click my *Inbox* Folder. From this menu you may quickly perform common tasks and functions such as Copy or

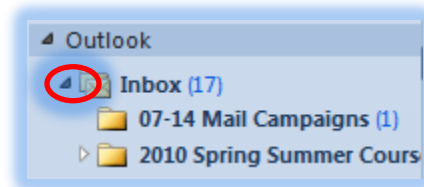
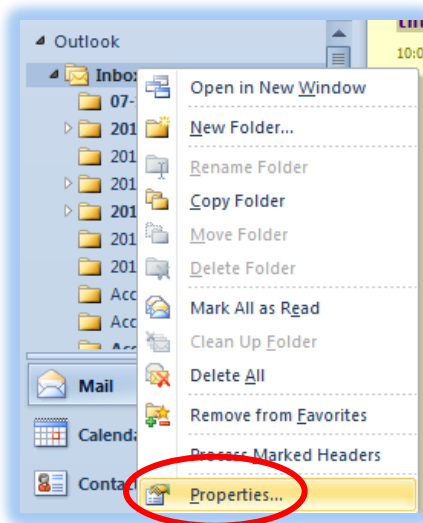
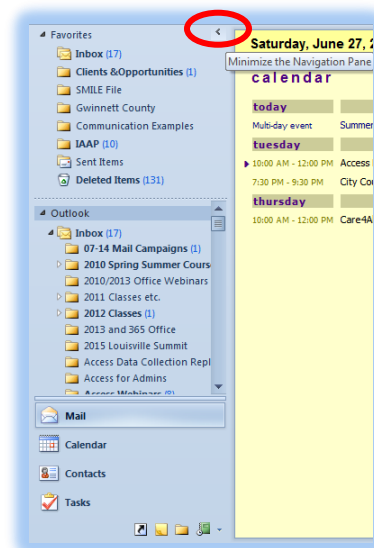
Rename (*Note: You are not permitted to*

rename the Inbox Folder – thank goodness and other important common folders, such as Sent items.). An important item that we

will use in this course for our Outlook objects and folders is the *Properties item* at the end of the shortcut menu. The *Properties item* will display an important menu for us to view items such as the size of our folders.

✈ **A Hot Tip! You may quickly minimize the Navigation Pane by clicking the minimize arrow (<) at the right side of your Navigation Pane Title. After minimizing the Navigation**

Pane you may maximize by clicking the maximize arrow (>) This is displayed above and circled for you. You may collapse and expand your folders and groups by using the chevrons- circled at right for you. Try both of these features. You may still use the minimized Navigation Pane to maneuver to your Outlook folders and objects. I also added the Expand and Collapse button to my Tab in the Ribbon and the Quick Access Toolbar. ✈



We will examine the *Navigation Pane* in detail as we learn each of the Outlook objects, such as *Contacts* and *Calendar*. First, we will learn how to customize and use the *Navigation Pane* using our *Shortcuts Navigation pane*.

Folders



Folders and managing large amounts of data, particularly Email, have been popular in Outlook with the **Folder tab** makes managing and creating Folder easier than ever.

New and Actions – The *New and Actions Group* creates new folders and manages current folders for you. You should create lots of folders in Outlook to store your messages, contacts, and even create different calendars. Once you create a new folder, the *Actions group* permits you to copy, move, rename, and delete the selected folder. Note: Since I have my **Inbox** selected Outlook will not permit me to **Move**, **Delete**, or **Rename** this important folder; however, I can rename, copy, delete, and perform other actions on Folders that I create for clients, as a reference, and so on.

Clean Up, Favorites, and Properties – The theses groups allow you to manage your folders and create action items, such as rules. I like showing my often used **Folders in Favorites** which is a section of the *Navigation Pane* at the top for you to quickly maneuver to your popular and regularly used folders. You can set your **AutoArchive** options here and click the Folder Properties for view the folder size, description, and your **AutoArchive** information.

You should select your Inbox and review these settings and place your Inbox, Drafts, Sent Items in Favorites.

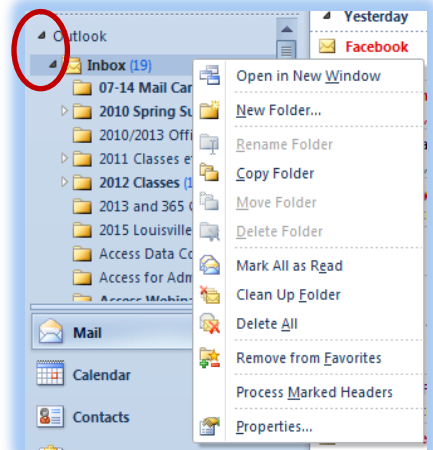
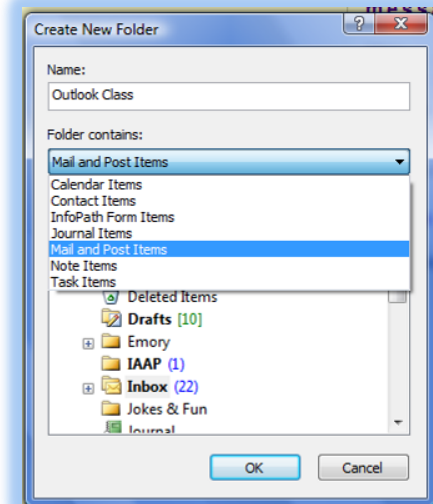
Creating A Folder

Here's how you create your own folders:

1. **Click the New Folder Button on the Folder Tab. Also, I use the New Folder button I add to my Quick Access Toolbar; this is the quickest and easiest method for me. Notice from the menu, that the Keyboard Shortcuts are CTRL+SHIFT+E to create New Folder.**
2. **The new Folder dialogue box opens**

3. In the First Box (Name) type an appropriate name for your folder,
4. In the Folder contains box use the Drop Down listing to select the type of folder you wish to create
5. A very important box is where to place the folder. After you enter a name and the type of folder, choose where to store your folder. You can have folders (directories) with sub-folders (sub-directories). For example, under Contacts, I have folders for Personal contacts, Professional contacts, and other contacts that are specific for a mailing. I will place my new Mail folder as a sub Folder for my Inbox. **BE CAREFUL!** A lot of people forget where they put their folders and claim Outlook "ate it", when the folder is accidentally buried underneath another folder or sub-folder. Clicking the arrow expands or collapses your folder for viewing.
6. When complete, click OK and your folder appears in your folder list - ready to store your Outlook items.

➤ **A Hot Tip! When you right click a folder the menu at right displays. This is another handy shortcut menu for you to quickly Copy your folder, Open your folder, or create a New folder. The Properties item at the bottom is important to know the size of your folder and other attributes of the folder.** ➤



Copying and Moving Outlook Items

There are several different steps that you may use to copy or move your Outlook items, such as contacts, emails, appointments, tasks, and other items. We will look at various means of copy/moving your Outlook items. We will use contacts for our exercises here but these same procedures work with other Outlook objects and items.

Here are the steps to copy a contact.

- 1. Click the Contact Button on the Navigation Pane to activate your contacts.**
- 2. Locate the contact you wish to copy and Click it to select it.**
- 3. Press the CTRL key on your keyboard and keep the key pressed as you Click and Drag your contact to the folder in the Navigation Pane you wish. When the folder is highlighted, release your mouse button and then release the CTRL key. Always release your mouse button first and then the CTRL key; otherwise, Outlook will MOVE not COPY your contact. You can move a contact or other Outlook item simply by clicking the item and dragging it to the folder you wish at the top of your Navigation Pane.**
- 4. Your contact copies for you.**

✍ **A Hot Tip! You may select multiple items that are continuous by clicking the first contact you want, pressing the shift key on your keyboard and then clicking the last contact you want to copy – All contacts between these are selected for you. Now, you may press your CTRL key and drag the selected contacts to another contacts folder. You may select various contacts that are NOT continuous by clicking the first contact you want, pressing the CTRL key and clicking the contacts you want to select (keeping the CTRL key pressed). As you click, the contacts highlight or select for you. Once selected you may copy or move them to another folder as previously described. You may**

press the CTRL + A keys together to select ALL of your items and then move or copying all of the items at once. ➤

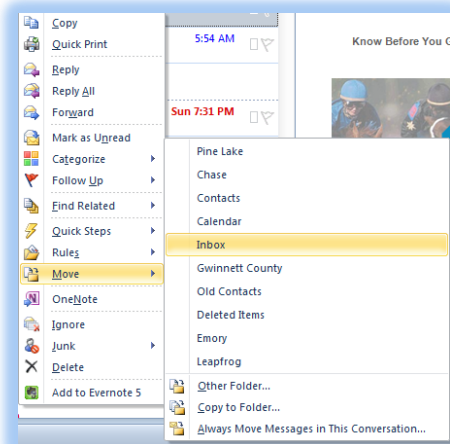
We have used the click and drag method of copying. There are other methods of copying/cutting and pasting your Outlook folders and items. *After you select your items and have them highlighted, you may also use these methods of Copy or Move:*

- ✓ **Keyboard shortcuts of CTRL + C for Copy or CTRL + X for Cut and CTRL + V for Paste,**
- ✓ **Right Click for short cut menu to copy or cut and then right click where you wish to paste and choose paste from the shortcut menu,**
- ✓ **Use the Move Group and the Move menu on the Home Tab for email messages and the Actions Group on the Home Tab for contacts. Using the Other Folder item, activates the full menu of folders to move/copy your Outlook selections.**

Using your folders

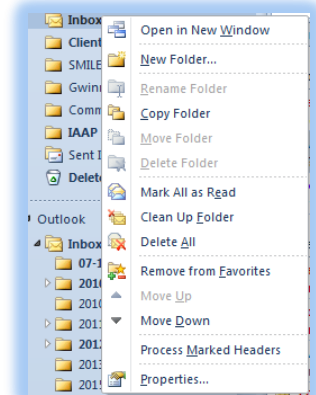
Making your folder convenient (and to remember that you created it) is essential to using it. *From your main email window, You can move or copy email messages to your folder, here's how:*

- *To move the message(s) Click and Drag the item (e-mail message or several messages at once) to your folder of choice. To copy the message by click and dragging press your CTRL (Control) key while you click and drag your message to the correct folder.*
- *Select your items to move to a folder and use the Move to Folder button on your Home tab,*
- *Right click on your message(s) to move and choose the Move option – the Shortcut menu appears at right. After you hover over the Move item, the Move menu appears for you to select the folder to move your item.*
- *With your Message open you may use the Move to Folder in the Action Group on the Message Tab.*



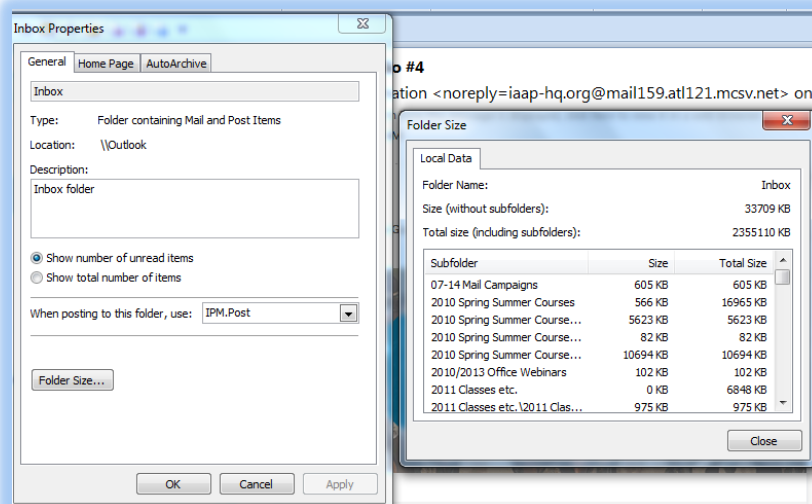
Folder Management

Right clicking a folder will produce the menu displayed on the next page for you to manage your folder and accessibility. This menu allows you to access most, if not all, of the features you will need to copy, move, or delete the folder. The shortcut menu allows you rename your folder and to click the **Properties** item to received detailed descriptions of your folder. *✎ Certain folders such as the Inbox, Outbox, Sent Items, will not allow you to Delete them, Rename them or other attributes that folders you create will allow you to accomplish.* ✎ Below, my **Properties** box for my **Inbox** appears. I use this to know my folder size.



Here's how to know your folder size.

1. Right click on your folder in Folder View.
2. Trace to and Click Properties.
3. From the Properties dialog box ensure that you are in the General Tab, Click the Folder Size button (My Properties box is pictured below).
4. The Folder Size dialogue box opens displaying the size of this Folder and the associated Subfolders.
5. The Properties box has other tabs to assist in your Folder properties, such as using AutoArchive.



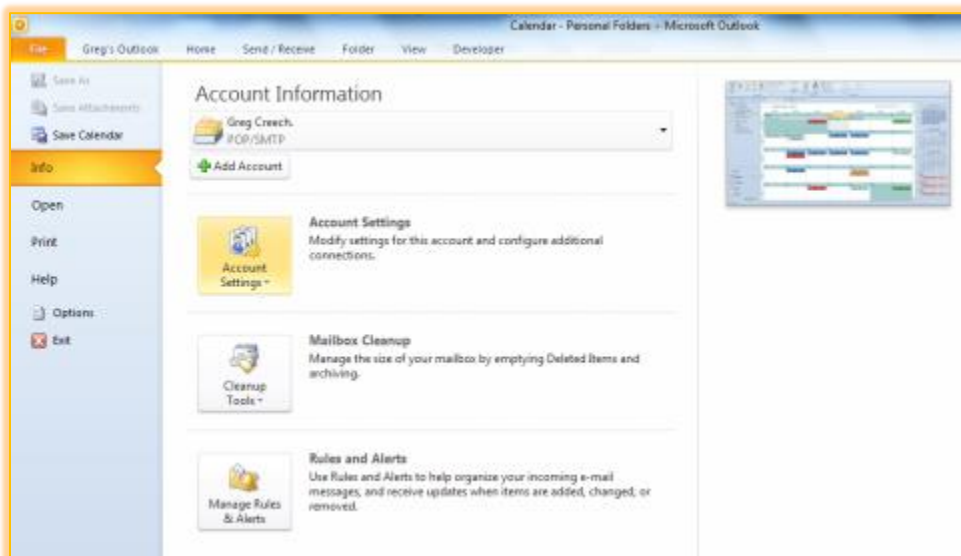
The Return of File!

There were many improvements in *Microsoft's Office* 2010/2013 with the release of Office 2007; however, using the *Microsoft Office Button*, pictured at right, instead of good, ol' **File** was not one of the improvements and therefore disappears (YEAH!) with Office 2010. A *File Tab* returns *bigger and better than ever*.



Outlook's File Tab

With some many different types of objects and items in Outlook, the *File Tab* in Outlook is different and will change based on the type of object and item in which you are working in Outlook. My *Info Pane* appears here; this pane contains the *Add Account* and *Account Information item* for you to view your *Account Settings* and edit/change them from the subsequent menus. Outlook's *File Tab* doesn't contain the *Recent pane* nor the *Save*, *Save As*, and other commands found in Word, Excel, PowerPoint, Publisher, and Access.



🦋 **Hot Tip! If you use an Exchange server for your Outlook or other servers your File Tab displays different settings for you, such as using the Out of Office Assistant and Delegation. I am using Outlook in a stand-alone mode without an Exchange server.** 🦋

Outlook Options

General Pane

Outlook Options were disorganized since Outlook Version 1.0 and the previous menus and organization were cumbersome. *Outlook 2010* improves the organization and the interface for accessing many important and fundamental options that affect Outlook overall.

With Outlook 2010/2013 open, click the File Tab and then click the Options item at the bottom of the left pane above Exit.

Your *Outlook*

Options pane

opens at the

General pane.

This is similar to

other Office

applications with

your *User name*,

Show Mini

Toolbar on

selection, and

Color scheme.

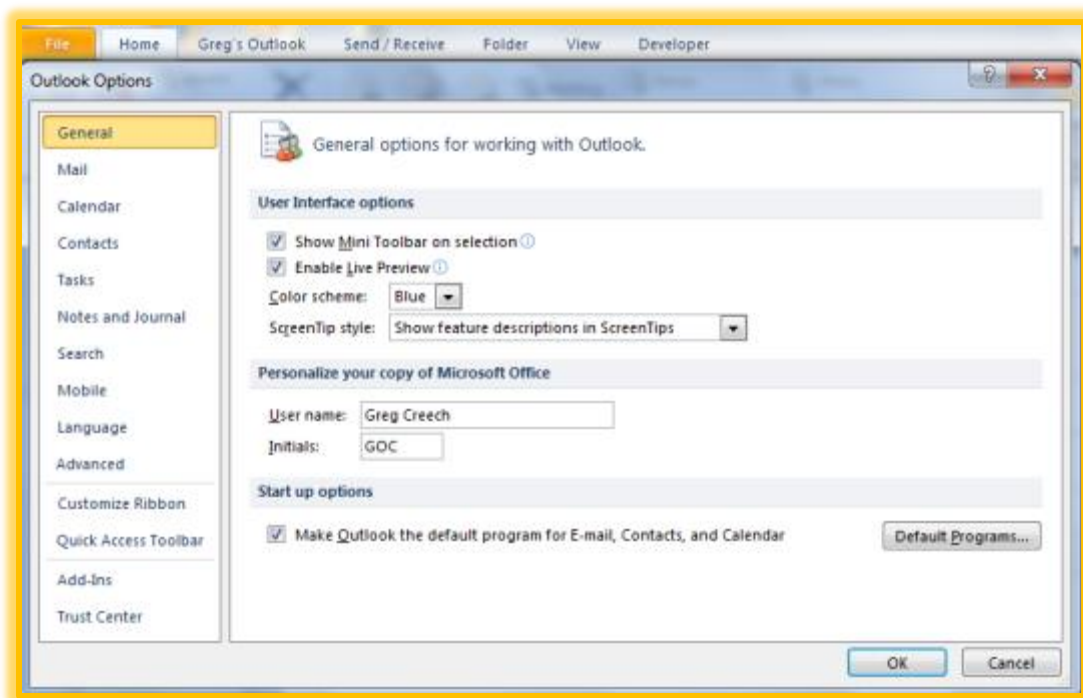
You should set

your preferences

here for *Outlook*.

I also make sure I

make *Outlook* my default program for my E-mail, Contacts, and Calendar.

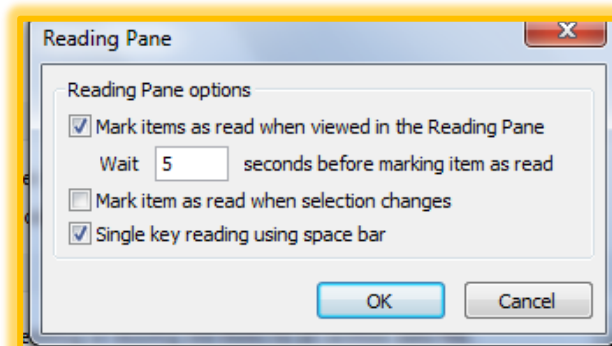
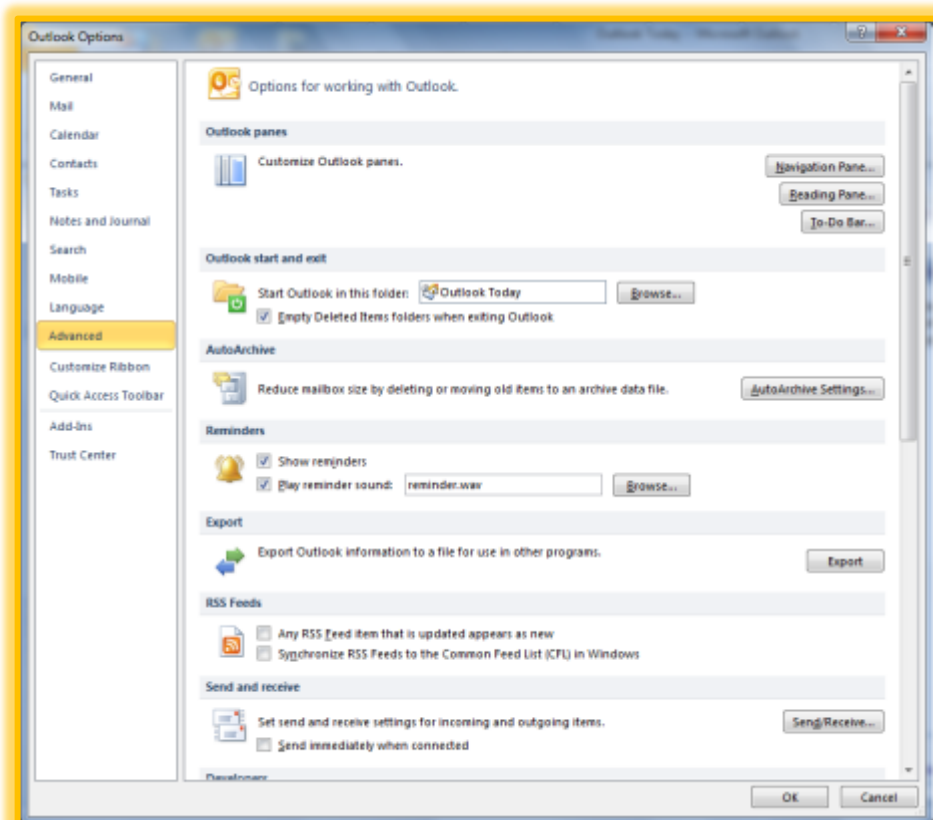


The *Outlook Options* pane has several items that we have studied thus far, such as *Customize Ribbon* and *Quick Access Toolbar*. I will overview some of the important items starting with *Advanced* and *Mail Options*.

Advanced Options

The Advanced options are not advanced at all and contain some of the most important settings that guide your use of Outlook. You will want to review these options and set them as you convert to Microsoft's Outlook 2010/2013.

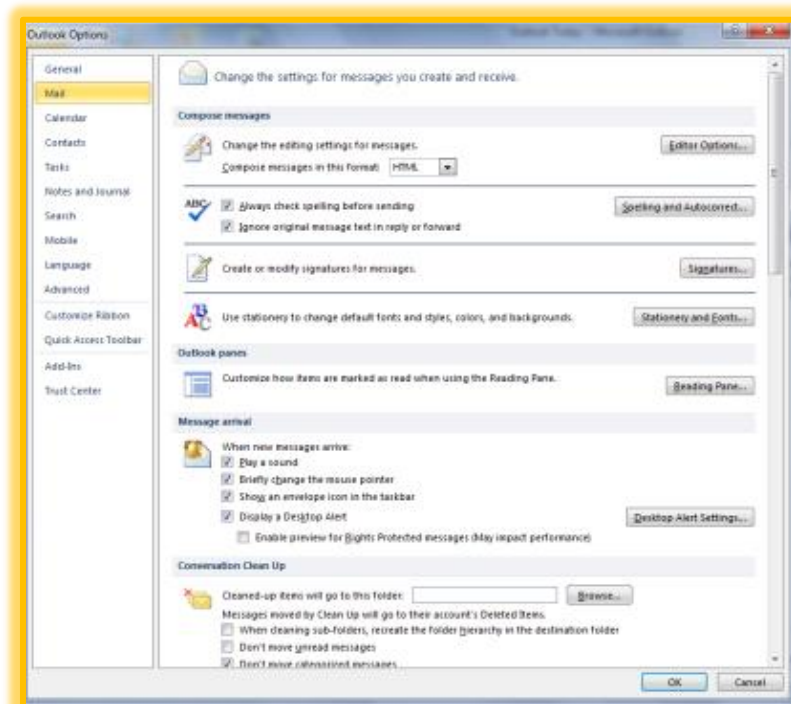
- 1. With your Outlook Options open, Click the Advanced item.**
- 2. You should review the Outlook panes and set those options. We will review these in detail in a later section particularly the To-Do Bar. There are other ways of quickly accessing your Navigation, Reading, and To-Do bar options which we will learn later. Pictured here are the Reading Pane Options which I make sure I change the option of moving from one message to another – I accidentally change messages from Read to Unread by moving my cursor. I like using the first option of marking my messages as read after a minimum of 5 seconds – that gives me time to preview the message and decide if I need to open it.**
- 3. Set your options here if you like**



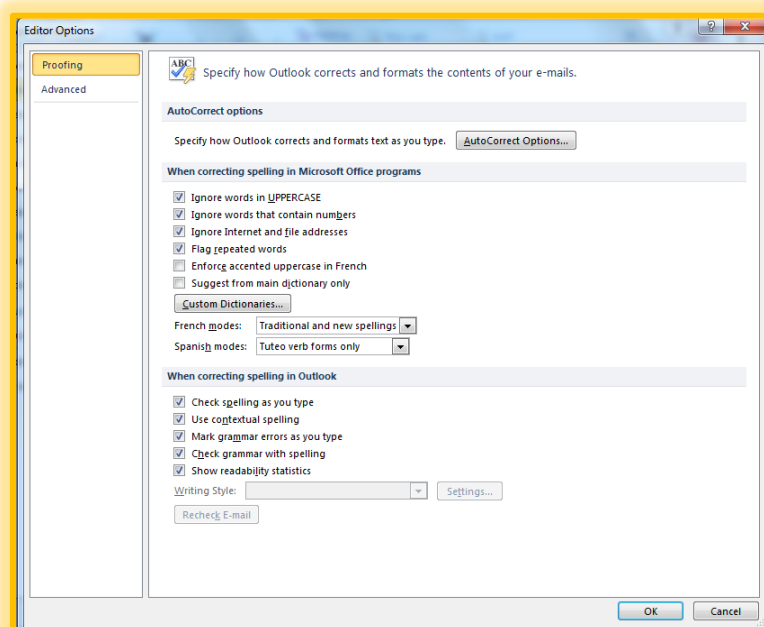
Mail Options

Your *Mail Options* are packed with all sorts of items for review for formatting and managing your email messages and folders. Some of the items that you want to know are:

- 1. Editor and Spelling and AutoCorrect Options – setting your important proofing and spelling suggestions. I have all of my spelling help activated and I have the Show Readability Statistics checked. We will work with AutoCorrect later.**

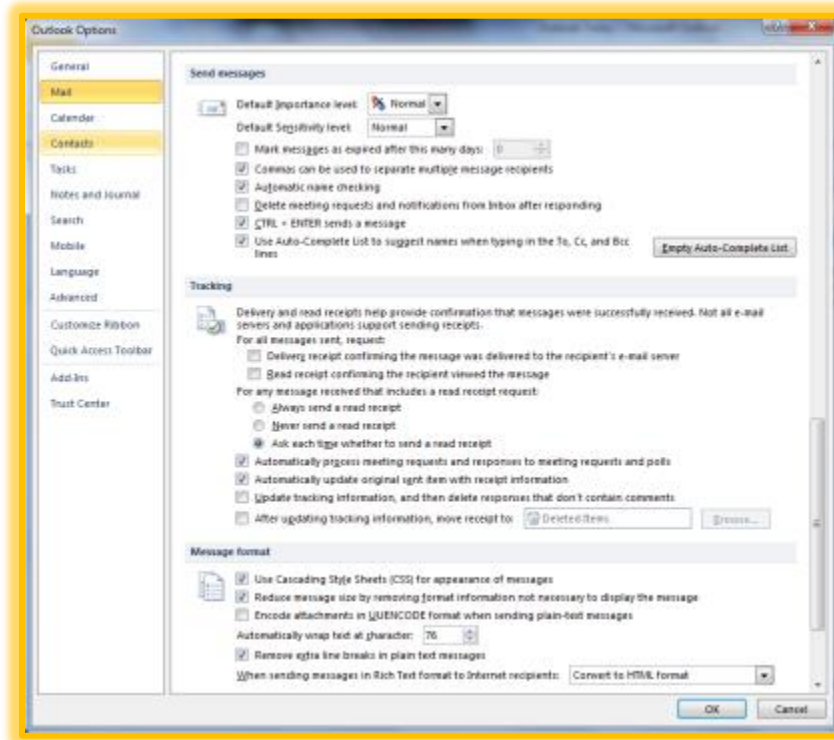


➤ **Hot Tip! When you compose a message and activate your spell checker through the F7 Key on your keyboard or the Button on your Ribbon, Outlook will display a screen letting you know what grade level you are writing and the percentage of passive voice sentences and other information. This is not on by default and you must go through the spell check to receive the Readability Statistics pane.** ➤





2. **Signatures** – providing information at the bottom of all your email messages. You should include your contact information and may have different signatures for new messages and replies/forwards as well as select different signatures based on the accounts you are using.
3. **Message arrival** – setting how you want to know about incoming messages – I have all of my options chosen and I modified my Desktop Alert through the Desktop Alert Settings so my desktop alert remains in view for a longer period.
4. **Send messages** - This section provides ways of setting your Importance and Security Levels on ALL of your messages, using commas instead of semi-colons to separate your email addresses, and I have unchecked the *Delete meeting requests and notifications from inbox after responding* because I like to keep this message for future reference and assistance. I certainly like using my keyboard short cut of CTRL + Enter to send a message and I have Outlook suggest names in my to, cc and bcc address lines. I haven't needed nor wanted to Delete my Auto Complete List History.
5. **Tracking** – This allows you set your Delivery and Read Receipts for ALL of your messages; there are options that allow you to only set Delivery and Read receipts for specific messages which is what I use. This section provides ways for you to determine how you respond to read receipts, too.



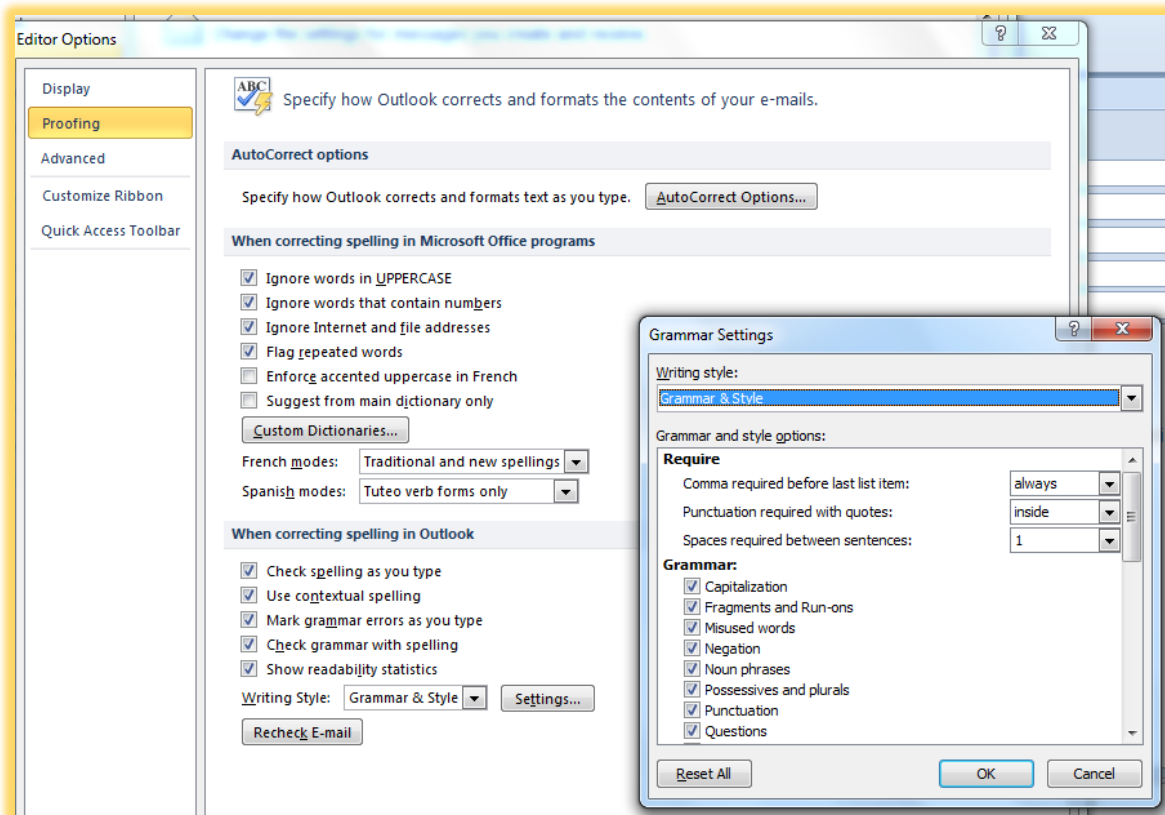
You should review the other *Outlook Objects*' options, too, to set your *Calendar*, *Contacts*, *Tasks*, and other items in Outlook.

Message Options

When you are creating a message, the Options in your File Tab is different than in the overall Mail Options that we reviewed allowing you more preferences.

Let's look at some of the Options you have when creating emails.

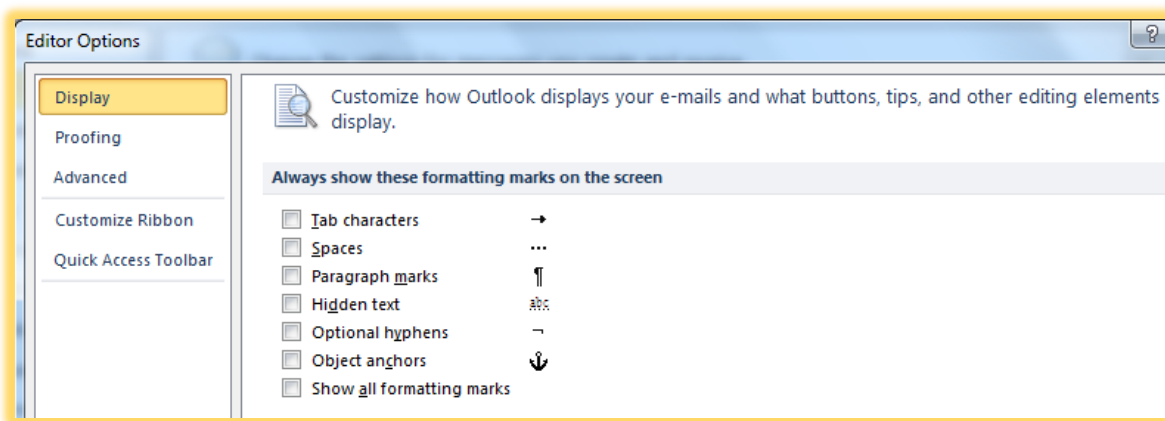
- 1. Create a new Email. Click the File Tab and the Options item.**
- 2. At the Mail pane, click the Spelling and AutoCorrect button and**



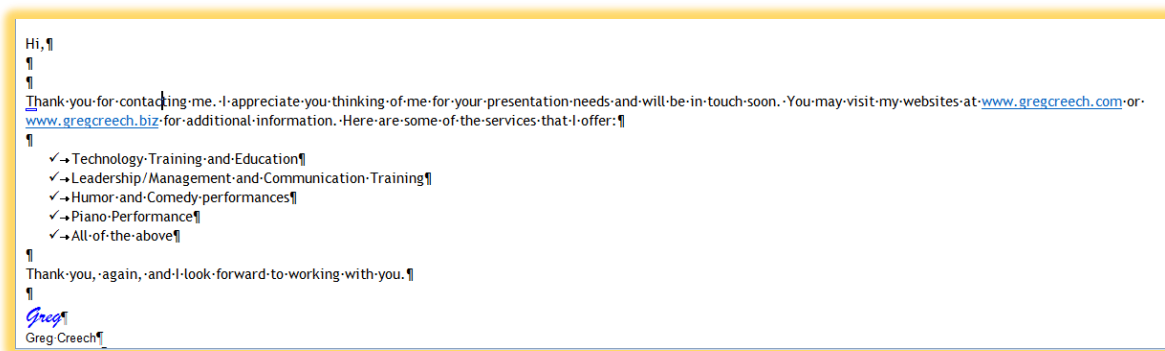
the Editor Options pane appears. Click the Proofing item and then the Settings. . . button at the bottom of the pane. Your Grammar Settings pane displays for you to set your Grammar and Style for your email messages. I have my comma required before last list item at always, punctuation is inside of my quotes, and I

have one space between sentences. I have set my Grammar to ignore contractions and use of first person. You should set these according to your style and preferences. Click OK after making your selections.

The Display tab in the Editor Options allows you to show your punctuation marks in your email.



Here's my email message with the Show all formatting marks item checked. After reviewing my email, I return to the Editor Options and uncheck the box.



🔥 Hot Tip! When making these changes in Editor Options in one email, these options stay on for ALL of your email messages, so you need only go through your Spelling and Grammar selections once. 🔥

Outlook's Format Text Tab

The Outlook's *Format Text Tab* allows you to change your font, paragraphs, styles, and other attributes of your text and words in your *Notes* area and body of your Email, Contacts, Appointments, and Tasks. Remember you may use your *Mini Toolbar* for formatting as well, especially when you are working in another tab – the *Mini Toolbar* is particularly helpful. The *Message Tab* in Email messages contain formatting for your in the Basic Text group. Here's an overview of the Format Text Tab and the Groups.



Clipboard – This Group contains the important cut, copy, paste, and Format Painter. These buttons allow you to move and duplicate your text, items, or objects and to copy your formatting of your text. The Dialogue box launcher will activate the Clipboard Task Pane for you to add items as you cut/copy from the web or other applications.

Format – This Group only appears on the Email object and is not included in the Format Text Tab for Appointments, Tasks, and Contacts. This Email Group allows you to change to overall format of your Email message – the Default is HTML, but based on your email server and that of the person you are communicating you may change this to Plain Text or Rich Text.

Font – This Group allows you to format your selected text with a different font, font size, bold, italics, underline, and case. There are many other options for you by clicking the Font Dialogue box, which provides a dialogue box for other formatting attributes.

Paragraph – Affects your paragraphs for bullets, numbering, outlines, indents, spacing, and alignment of your text. Like the Font Group, the Paragraph Dialogue box launcher activates Dialogue boxes for you to use to format your paragraphs further.

Styles – Styles are predefined formats and create a structure and attractive appearance of your text using the Headings. You may change your Styles, Colors, Fonts and other

attributes using the Change Styles command button and menu. The Dialogue box launcher here activates your Styles task pane to use instead of the style gallery.

Editing— This Group allows you to find and to replace certain text within the Notes area or body of your email, appointments, and tasks. The select object allows you to select or highlight objects that are behind your text or to select text with similar formatting.

1. **Create a new message. After entering text, select the text and practice using the items in the Font and Paragraph group for formatting your text, including creating a bullet list.**
2. **You will find the Format Text Tab very similar to Word's Home Tab.**
3. **Once you complete your message, press the F7 key or the Spell Check button. Outlook activates your spell checker to review your message for spelling and other items that you selected using the Options pane.**
4. **If you activated Readability Statistics that we learned earlier, the Readability Statistics pane displayed below appears. The pane lets me know important information about Passive Voice sentences and grade level I'm writing.**



Readability Statistics	
Counts	
Words	74
Characters	408
Paragraphs	9
Sentences	4
Averages	
Sentences per Paragraph	4.0
Words per Sentence	11.0
Characters per Word	5.0
Readability	
Passive Sentences	0%
Flesch Reading Ease	66.8
Flesch-Kincaid Grade Level	6.6
OK	

Outlook's Insert Tab

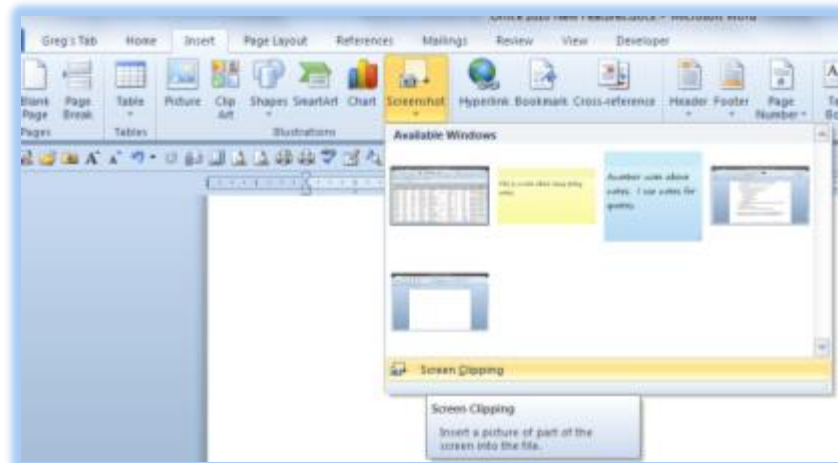


Screenshot Editing and Clipping

Wow! What an Improvement – as a writer and specifically a technical writer I use many screenshots in my documents as you can tell from this manual. The process required several steps in the past or the use of a third party vendor to accomplish robust and quick screen shot editing and use. Office 2010 provides **Screenshot editing** built into the applications.

With files and programs open and active, you may use the **Insert tab** and **Screenshot**.

I like using **Screen Clipping** because whichever file you were previously working you may click **Screen Clipping** and the previous file opens and dims for you to click and drag the area that you wish to insert your **Screenshot**. If you simply click the item in the **Available Window** menu, the entire screen inserts into your file. After the insertion then you will need to perform



2023 Database Management - Microsoft Excel												2023-09-01	
File Home Insert Layout References Formulas Data Review View Developer													
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Clipboard Font Paragraph Styles Cells Tables Data Tools													
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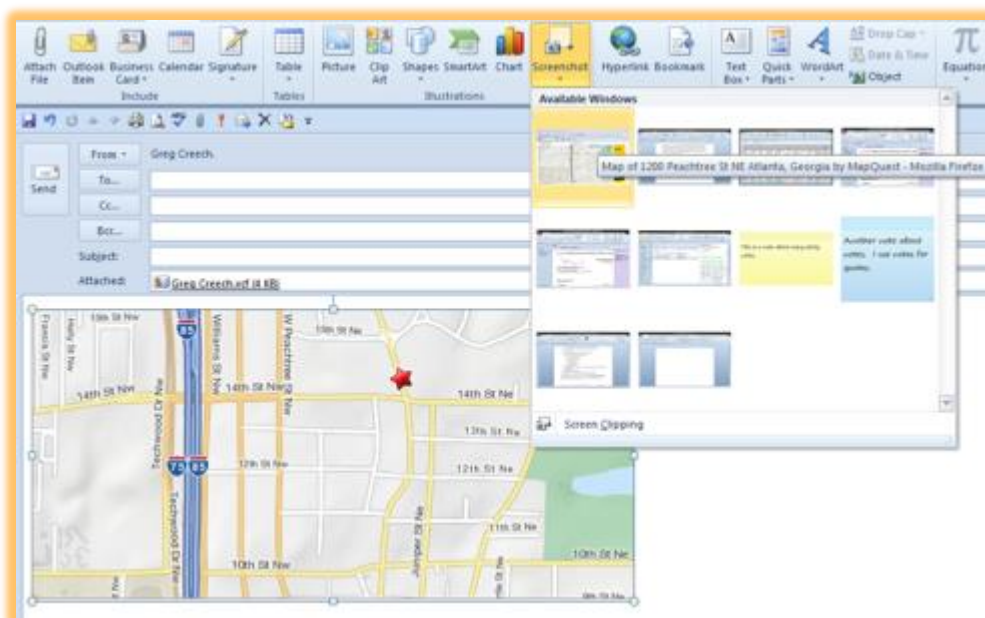
any formatting, such as cropping and resizing.

As an example, I open an Excel workbook with a listing of clients; this file appears first in my list of **Available Windows**. As displayed above I am choosing **Screen Clipping** and since I was in the Excel worksheet last, Office opens my Excel worksheet and dims for me to click and drag to select the area I want to insert into the document as displayed here. After I click and drag the area and then release my mouse button, this area automatically inserts into my Word document!

In Outlook, I want to insert a portion of a map for a client that is “directionally challenged” (a man no doubt). After using a map program to locate the address, I open Outlook and a new mail message. I click the **Insert Tab** and **Screenshot**. The first item in the **Available Windows** is the map. When I click **screen**

clipping Outlook minimizes and the mapping web application activates for me to choose the area I want including in the email. After clicking, dragging, and releasing my mouse button, the area inserts into my email message as displayed here. This saves a lot of time, especially for all of the screenshots you see in my manuals and books.

If you have Windows 7 there is a nice Snipping Tool that you may use as well. The **Snipping Tool** allows you to Snip your Desktop and other items that may not include in the Office screenshot. You may use this feature for error messages and other alerts from your computer to email to a technical support person.



⊗ **An Important Gotcha! You may not (actually CAN NOT) have your files/applications minimized to view in the Screenshot menu. Your files must be open, active, and not minimized.** ⊗

Let's Practice using this new feature.

1. **Open Outlook and create a new email message.**
2. **Next Open Excel and the Track Workbook. Sort the worksheet by customer name we only want to send ABC information to the client as a screenshot in the Email message. After sorting your table alphabetically by client, return to your Email.**
3. **Click in the body of your Email and your Insert Tab items activate. Click the Screenshot button and Outlook displays your Available Windows – notice the Excel Workbook is the first pane in the window.**
4. **Click Screen Clipping, Office leaves Outlook and opens the Excel Workbook for you which dims. Click the cross hair cursor and drag the information for ABC Company as displayed above. After you click and drag, release your mouse button and Office inserts the Screenshot into your email.**

	Order	Date	Customer	Word	Excel	PowerPoi	Access	Outlook	Total	Paid?
7	101	1/2/2012	A. B. C. Co	5	-	5	-	5	\$750.00	Yes
8	109	1/4/2012	A. B. C. Co	-	7	5	-	5	\$850.00	Yes
9	152	1/22/2012	A. B. C. Co	-	-	-	55	-	\$2,750.00	Yes
10	176	1/8/2012	A. B. C. Co	5	-	5	-	5	\$750.00	Yes
11	184	1/16/2012	A. B. C. Co	-	7	5	7	5	\$1,200.00	Yes
12	119	1/7/2012	ABC Co	-	-	10	-	10	\$1,000.00	Yes
13	134	1/14/2012	ABC Co	50	20	-	10	-	\$4,000.00	Yes
14	145	1/20/2012	ABC Co	-	-	10	5	5	\$1,000.00	Yes
15	149	1/21/2012	ABC Co	30	20	-	20	-	\$3,500.00	Yes
16	102	1/2/2012	Adam, Allan	-	1	1	1	1	\$200.00	Yes
17	177	1/9/2012	Adam, Allan	-	1	1	1	1	\$200.00	Yes
18	126	1/9/2012	Bates Motel	48	30	39	2	-	\$5,950.00	No

Clicking an item in your Available Windows inserts the entire screen for you to edit and crop. You should practice Screenshot editing by inserting a map or either item from the Internet into an Outlook email.

👉 **Hot Tip! Only the previous file in which you were working allows screen clipping. Otherwise, Outlook inserts the entire screen image or dialogue box when you click an item in your screen shot gallery of available screens.** 👉

Attaching Files, Outlook Items, and Photos

While *Outlook's Insert Tab* contains some of the items similar to Word and Excel, Outlook has other commands that are very helpful in using Outlook. For example, the *New Email Insert Tab* contains *Calendar*. Let's use some of the popular *Insert Tab* commands in Outlook; pictured below is the *Insert Tab* for a *New Email Message*. The *Insert Tab* like the *Format Tab* will gray out commands that are not available, except when in the body of an email message or the *Notes* section of a *Calendar*, *Task*, or *Contact*.



1. **Open a new mail message.**
2. **Click in the body of the message and type in text for a message.**
3. **Click the Attach File button and browse to where you store your files/folders for this manual and insert/attach the Budget Excel workbook.**
4. **Next, Click the Attach Item button and navigate to your Contact folder and select a contact to attach and email someone.**
5. **Insert your business card in the email, too.**
6. **Add a picture or Clip Art in the body of your email using the Picture button in the Illustrations Group.**
7. **Insert the date and time at the top of your email message.**
8. **Insert a horizontal line between your paragraphs of your email.**
9. **If you want to use a signature for your email you may choose your signatures from the list provided by the Signature button in the Include group.**
10. **Use some of the other buttons to add items to your email – we will work with tables and charts later.**

The Attach File Command is any object or file external to Outlook; the Outlook Item Attachment Command is ANY item, such as Appointment,

Contact, Email, Task, etc. that is internal to Outlook. I use both of these a lot in Outlook.

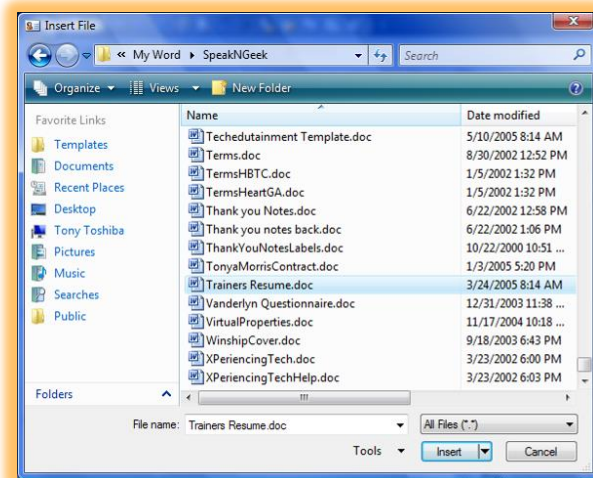
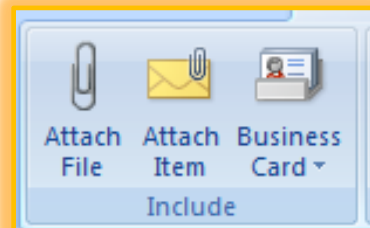
⊗ **Important Gotcha!** Outlook will place your attachments in the body of your email if your email is formatted as Rich Text and Outlook will place your attachments at the top of your email in the Attachment box if you use Plain Text or HTML Text formats. The Options Tab in the New Message pane contains the Plain Text, Rich Text, and HTML formats in the Format Group. ⊗

Insert Files and Outlook Items

Outlook allows you to place any type of file in the notes area. For example, my clients and friends send me their resumes, letters, and other documents. I attach important documents and files in this area so I won't have to go on a "seek and seizure" mission to locate a client's resume or proposal. You may attach external files using the *Attach File* button or *Attach an Outlook email, task, or other object*. The *Include Group* allows you to insert your or another contacts business card using the *Business Card* button.

Let's insert a file on one of you contacts.

- 1. Open a contact and click in the notes area of the contact.**
- 2. Click the Insert Tab and then click the Attach File icon – pictured at right.**
- 3. You will need to go browsing to locate the file you wish to attach. Maneuver to a folder containing a file to attach. Select the file and click the Insert button or simply double click the file to automatically insert the file and return you to your contact screen. An icon will display signifying you have an attached file.**
- 4. Double click the file to open it.**

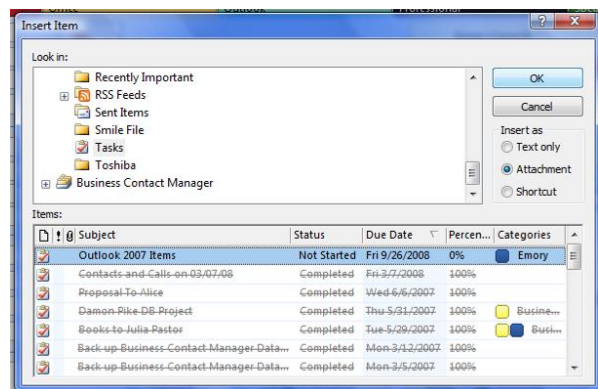


*I have attached a Word document entitled **Trainers Resume.doc** to my contact information.*

✍ **A Hot Tip! You can insert multiple files at once by clicking one file to insert and pressing your Shift key and with your Shift key pressed click another file to insert – Windows will select all files contiguously for you. You may press your CTRL (Control) key and click files that are NOT continuous. Either method of selecting files that are continuous using the Shift key or that are not continuous using the CTRL (Control) key are quick and easy methods of selecting multiple files in the same folder. You may use these methods throughout Outlook to select multiple objects and items at once.** ✍

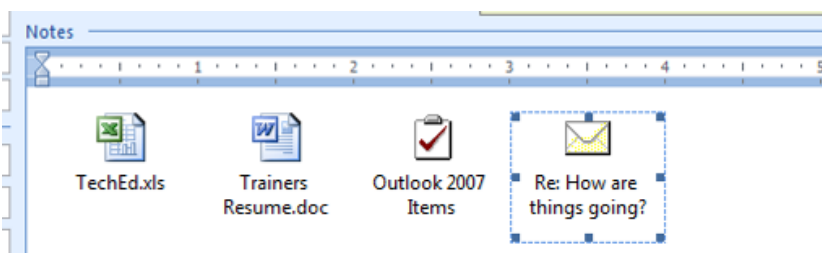
Next, let's insert an Outlook Item.

1. Click the Attach Item Button.
2. You will need to Navigate to the Folder and item you wish to insert using the Look in and Items section of your Insert Item pane. I am inserting a task Items.
3. Select your item Click OK.
4. A icon appears for you and your inserted item.



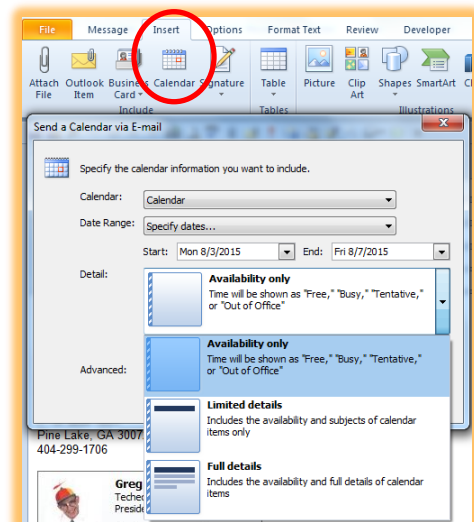
My Notes pane appears at right with the files and items I have attached. You may click and drag to rearrange your files and items. My

attachment do not appear in the header of the email but in the body of the email because my email format is not HTML.



Insert Calendar

An item that I like using in the Insert Tab is the Calendar command. Clicking this command button retrieves a dialogue box with drop down lists from which you choose the calendar, date range, and the detail you want sent in the email. Outlook inserts a beautiful calendar with your options selected.



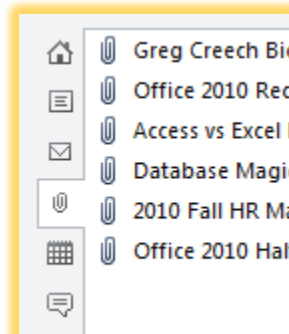
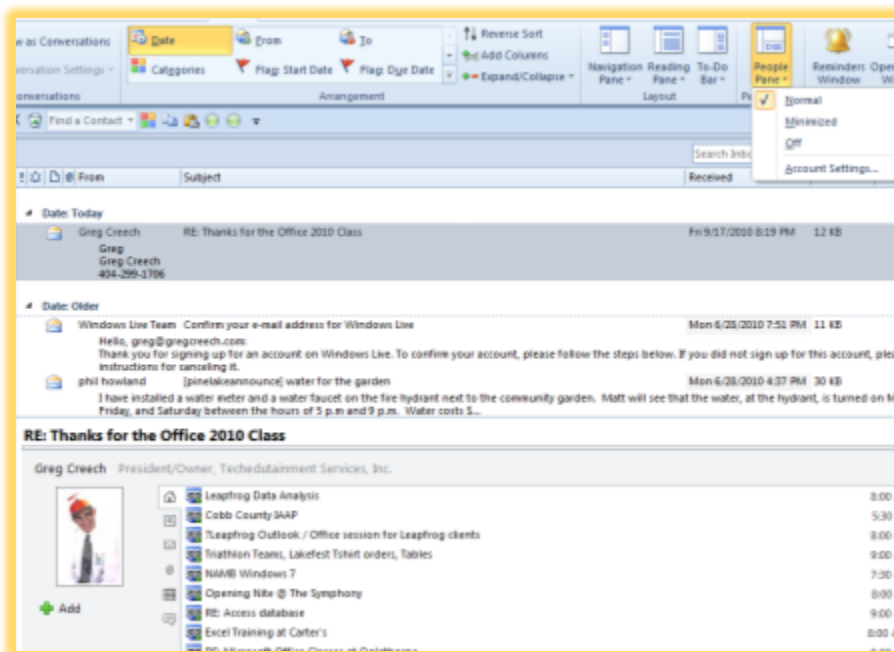
Lookout for Outlook's New Features

Outlook 2010/2013 has many new features and uses the Ribbon and new interface across the application, unlike Outlook 2007. We will examine some of the neat new features and overview some of the important tabs in Outlook such as the *View Tab*, *Send/Receive* and *Folder*.

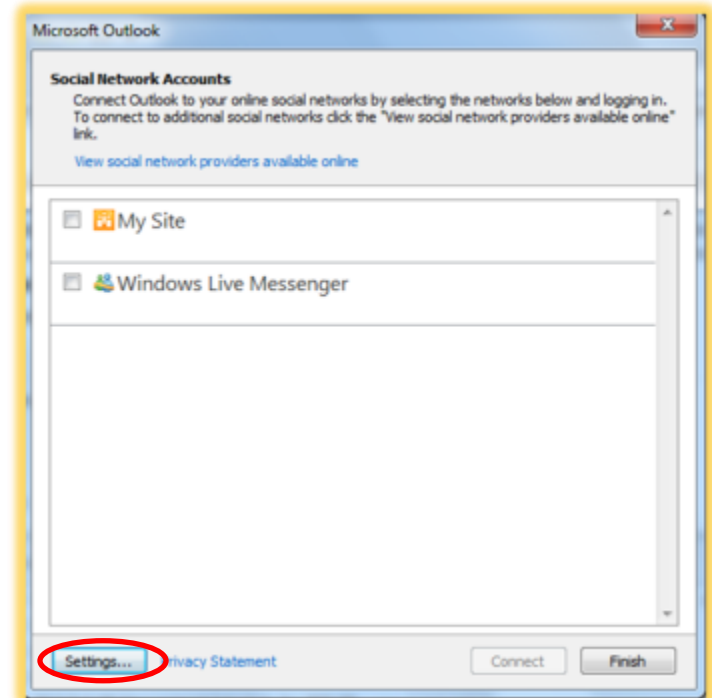
Outlook's People Pane

Outlook has finally moved into the new century. The *People Pane* is a popular pane for you to use to view ALL email messages, appointments, social network information, attachments, and so on for the person who you select. Here are the steps to activate your *People Pane* and set options.

1. Go to your **Inbox** (or any email folder) and Click the **View Tab**.
2. Click the **People Pane** command button and from the cascading menu choose **Normal**.
3. With any message selected you will see all of the **Emails**, **Appointments**, **Attachments**, and other items from that person. I have an email from myself selected and Outlook displays all of my information associated with me. The **Home** button displays all of your items. I have clicked the **Attachment** button displayed at right and all of my attachments appear. You can view **Calendar** appointments, emails, **RSS** and **News Feeds** and so on using these buttons.



- 4. The People Pane and Outlook allow you to add your Social Networks, such as Facebook and LinkedIn. After pressing the Settings button at the bottom of the Social Network Accounts Pane, Outlook prompts you for our login and password information. When you select an email or other item, Outlook displays the Social Network information rather than the Outlook information about the person. Also, this option may not be available for your organization to use Social Networks; however, most organizations allow you to use Outlooks' People Pane for view your emails, appointments, etc. with your Outlook. While I have the Social Networks active on my home computer, I prefer using the People Pane without Social Networks on my other computers. Using the People helps to get to specific emails, appointments, attachments and other items so much quicker and easier than before and puts the items in one nice neat pane.**
- 5. Use the People Pane button you can turn it off and you can use the borders to resize the People Pane, too.**

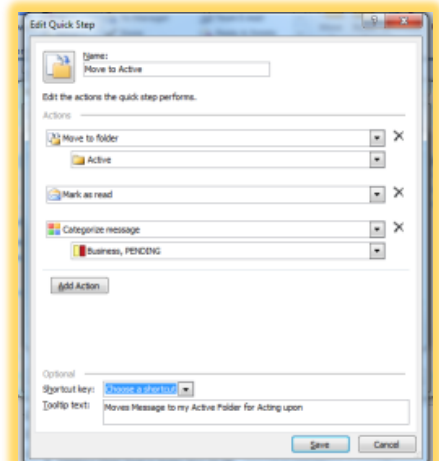
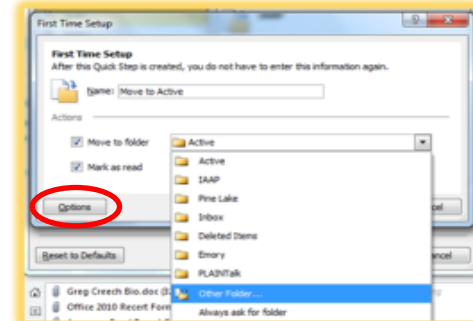
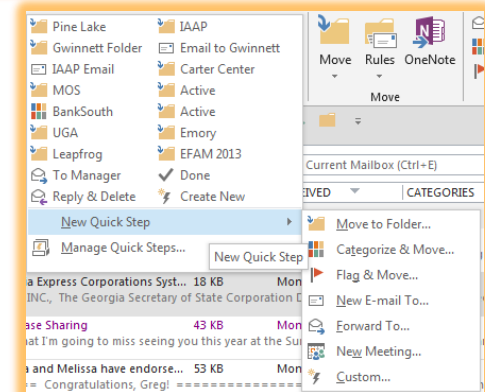
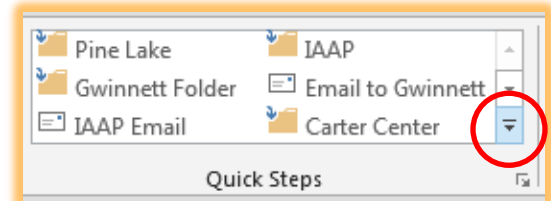


Outlook Quick Steps

Outlook's new **Quick Steps** feature is really cool and easy to set-up. This is an user-friendly way of creating shortcuts known as **macros**. **Quick steps** allows you to set the actions you take to perform a task, such as moving an email

message to a specific folder and assigning items to a category. The task completes with one click rather than several selections and clicks. You should create many quick steps to help you perform your repetitive tasks with one click rather than several. You will notice many actions and items that you may perform using **Quick Steps**. *Here's how to set-up a Quick Step for moving a message and assigning a category to the message.*

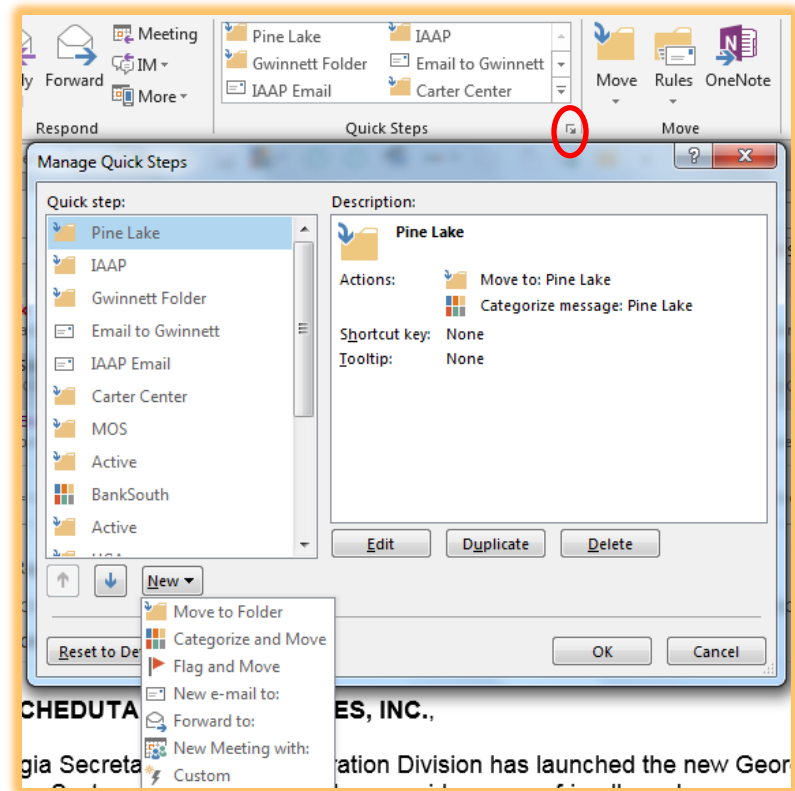
1. In the Home Tab of your Email object, Click the Dialogue Box launcher arrow or the See More arrow (circled above) and from the menu choose New Quick Step and then Click Move to Folder.
2. At the First Time Setup Box click the Options button at the bottom of the pane.
3. The Edit Quick Step pane appears. Name your Quick Step – I am moving a selected message(s) to my Active folder.
4. Next you may change your action or keep the Move to folder action, which I am keeping this action.
5. Next, click in the box under the action to choose your folder you may need to navigate or browse to find the folder you wish if it is not in the list by choosing the other folder item in your list.



6. Select the folder you wish to move the message to and Click OK.
7. I am keeping the Mark as Read item then I am creating another action to assign the message to categories. You may add other actions, too.
8. You may use a shortcut key to perform the action, too, by assign the Quick Step to one of the shortcut keys in the list.
9. I am provided a Tooltip text describing my Quick Step action as well.
10. Click Save.
11. Your Quick Step appears in your Quick Step pane ready for you to use and save time and steps.

The dialogue box launcher (circled at right) provides the Manage Quick Steps pane allow you to edit, create new, and move your Quick Steps.


🔥 **Hot Tip! Using Quick Steps for emailing to a group of people is great as is forwarding messages to a group of people using Quick Steps. The New Meeting with Quick Step is helpful, too.** 🔥

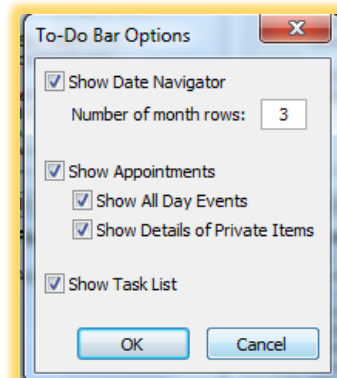
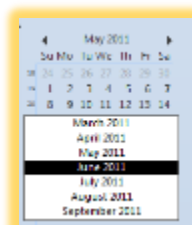
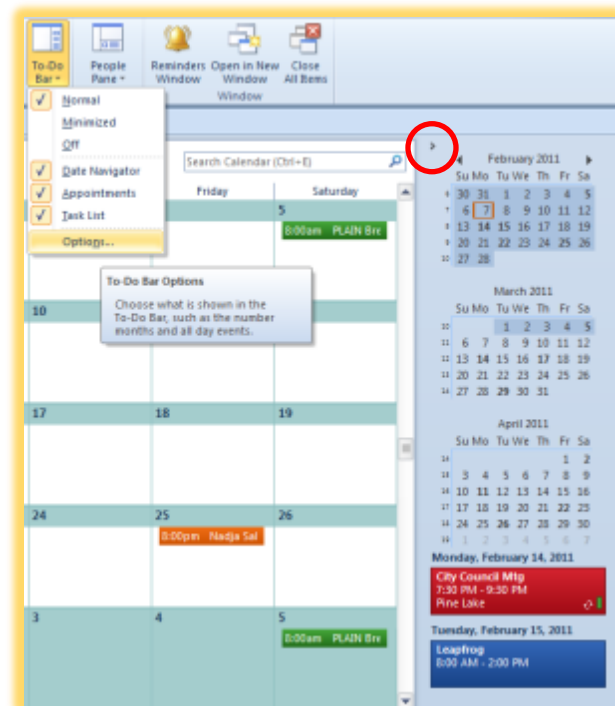


The To-Do Bar

A feature introduced in Outlook 2007 and worth reviewing here is the **To-Do Bar**. In Outlook 2007 had a new **To-Do Bar** for you to display your calendar, upcoming appointments, and Tasks. You can activate the **To-Do Bar** through the **View Tab** and clicking the **To-Do Bar Command button**. As displayed at right you may choose your items for viewing and the **Options...** item allows you to set the number of months, appointments, and tasks to view.

Hot Tips! Here are some Hot Tips N Tricks in using the To- Do Bar:

- ✓ You can double click the items on your To-Do bar's calendar, appointments, or tasks to open those items. (Outlook 2013 provides a preview of the item.)
- ✓ You may minimize the To-Do Bar using the Minimize arrow (>) which is circled at right for you. (Not available in Outlook 2013.)
- ✓ You can click on the Month header on your calendar and a series of previous and future months appear for you to quickly navigate to as displayed at right. (Not available in Outlook 2013.)
- ✓ You may click an email message and drag it to a specific date on your To-Do bar's calendar and Outlook creates an Appointment with the email text in the notes section and at the correct date. (Not available in Outlook 2013.) 

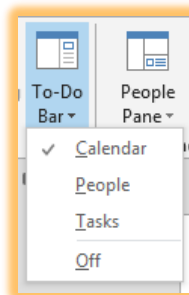


My **To-Do Bar Options** pane displays at right with my **To-Do Bar**.

⊗ **An Important Gotcha! You must activate the To-Do Bar in each of your objects.** Unlike the Navigation Pane which automatically appears in all of your views; not so with the activating the To-Do Bar. I used the View Menu item in Contacts and Calendar to activate my To-Do Bar in those objects. ⊗

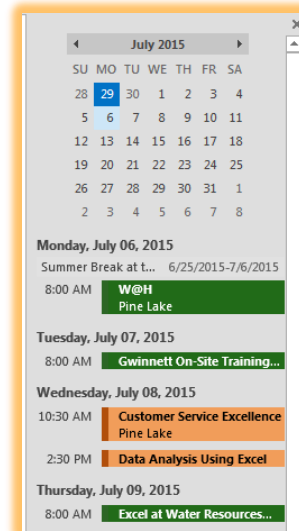
Outlook 2013 To-Do Bar

One drawback with Outlook 2013 is the To-Do bar doesn't allow click and dragging an email to a specific date to create an appointment on that date. You'll have to use the Open In New Window command that we learn later. You don't have as many options for your To-Do Bar in Outlook 2013, but you may still view your Calendar, People (Contacts), and Tasks. I like using the Calendar and having my appointments



display for the week or day that I click on in my To-Do Bar's calendar. I can view my email messages and then navigate to certain dates using my To-Do Bar's calendar. This helps me in quickly respond to email messages about availability. The appointments in the To-Do Bar have your category color displayed, too.

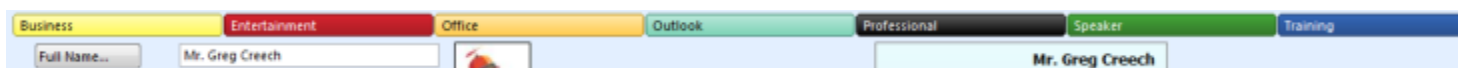
**Office 2013
Feature**



Color Categories!

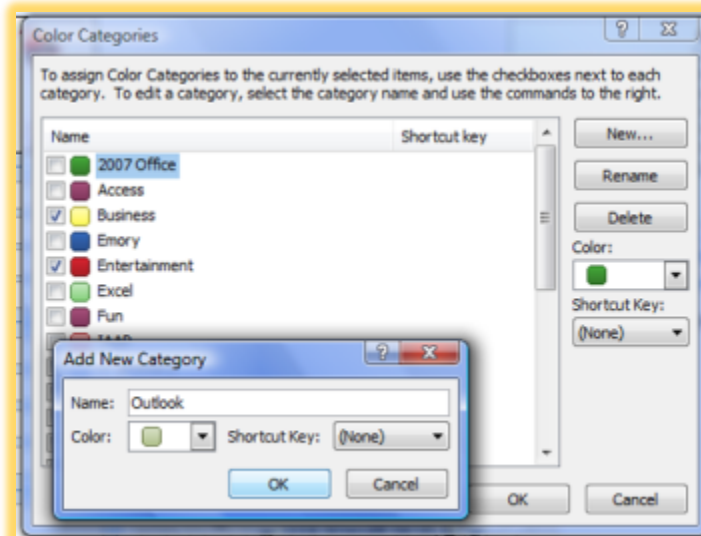
Using *Color Categories* is an excellent tool for organization; this is another feature introduced in Office 2007 that you should use in Office 2010/2013. You should assign your contacts, calendar appointments and meetings, and e-mail messages to color categories. *Categories* allow you to assign a person to more than one type of group or item. I use *Categories* to organize my contacts by type of business, type of service, type of account (good, bad, or prospect) and many other ways to help find and use contacts and other Outlook Items as a category group.

1. **Open a Contact and in the Contact Tab, click the Categories button in the Tags Group. A picture of the Categories cascading menu appears at right. I have added many of my own categories, as you can see. You should and may assign a contact to multiple categories for tracking and grouping.**
2. **To assign a Category simply click one or more of your color items. Assign yourself to several Categories. Your category name and color appear at the top of your contact. I assign my contacts to many categories so I may use the contact in various categories for Mail merge with Word, to send an email based on a Category, and other important areas. Here are my colorful categories.**



Please get into the habit of using this important efficiency tool. You can create, edit, and delete category choices by clicking the *All Categories button*. *Let's create your own Category.*

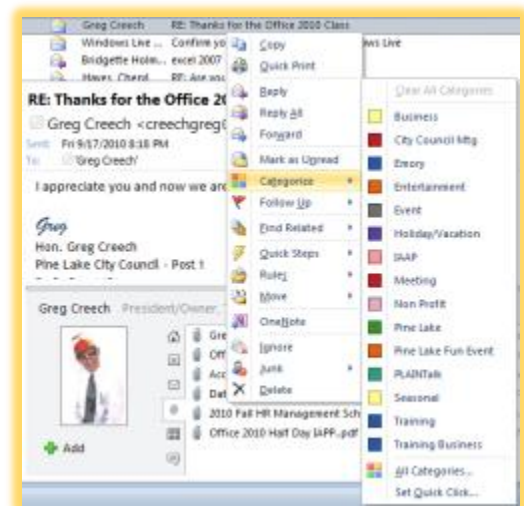
1. Click the **All Categories. . . button** and the menu at right appears – **Color Categories.**
2. Click the **New button** and Add a **New Category** as I am accomplishing for Outlook. Type your **New Category Name**, choose a **color** and assign a **Shortcut key** if you like.
3. Click **OK** for Outlook to accept and use your new category.



4. You can select a **Category** and **Delete** it or you may **Rename** a **Category** using the **Rename** button. You may change your **color** and **shortcut key** from your **Color Categories Pane**, too. Create many categories and assign your contacts as you create them to a category or two or three. . .

5. Click **OK** to exit the **Color Categories Pane**. Click the **Save and Close Button** for your **Contact** or **Calendar item** you are using **Categories**.

I customize my category list often in order to organize my contacts, appointments, and other items by a specific customer, type of account, business partner, or family member. You may always right click on an item, such as Calendar Appointment, Contact, Task, or as pictured at right an email message and assign a Category from the Shortcut Menu.



♪ If you import contacts or upgrade Outlook, not all of your categories may be in the list. You will see the words – Not In Master Category List in your Color Categories Pane. You will want to add or delete these categories. ♪

When you initially begin using Outlook, you will have categories, such as Red Category, Blue Category and so on. When you start assigning Categories you can give the color category a name. You can reuse colors for other categories. We'll look at how we can view our emails, contacts, and calendar by category later.

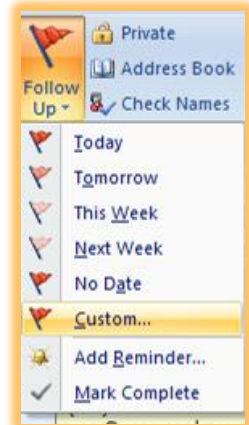
Follow-up Flags

If you need to create a reminder for an action to occur in relation to a contact, you may have your contact(s) selected and Click the **Follow-up Flag** button on the *Home Tab*. *The Follow-up Flag alerts you and reminds you of an action item that is to occur for a contact.*

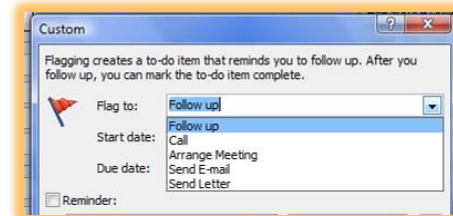


Let's create a Follow-up Flag for a contact that you created or use your contact information.

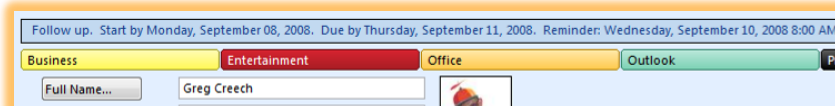
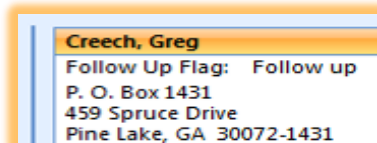
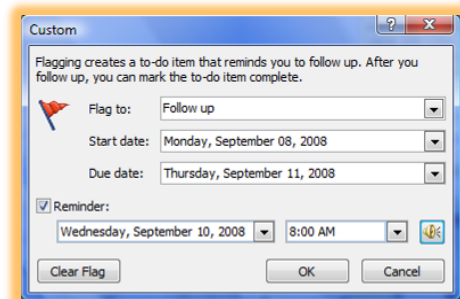
1. With your contact open in the General Pane or with the contact selected in the main contact window, Click the Follow-up Flag button.
2. The Follow-up Flag cascading menu appears when you click the button – you may choose your date from this menu – I am choosing custom.



The Flag for Follow-Up dialog box appears for you to select the type of Flag, such as an E-mail message or Call, and to set the Start Date, Due date, and date and time for the Reminder.



1. The Flag to: Drop Down box allows you to specify the type of follow-up action that is to occur – Select the type of Follow-up you wish for your contact.
2. The Start and Due Dates drop down box will provide a calendar for you to choose a due date.
3. Set your Reminder Date and Time.
4. After completing the information, Click OK.
5. Your contact has the Follow-Up Flag indicator in the Main contact window and when you open the contact the follow-up information is at the top



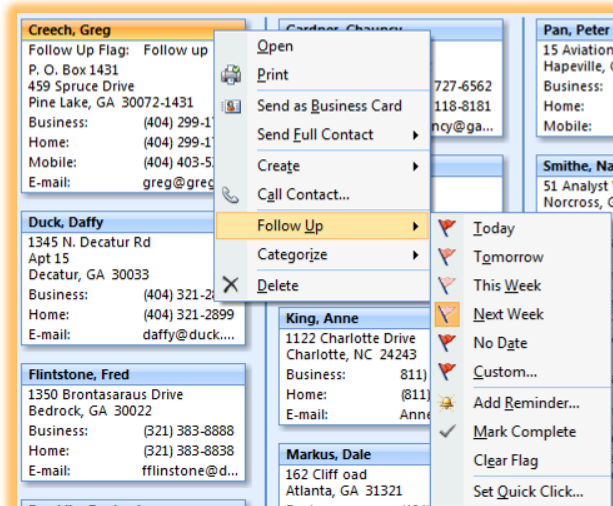
of your form above the Categories – these are pictured for you at right.

✍ You can delete or complete the flag by right clicking the contact with the follow up flag and from the shortcut menu click Clear Flag or Complete Flag. ✍

Displayed at right is the shortcut menu you will receive when you right click on a contact with a follow up flag.

On the Main Contact window, right click on the contact in which you placed the follow-up flag.

Notice all of the actions you may perform through using the shortcut menu. There are many shortcut menus and time saving devices in Outlook, such as right clicking on an Outlook contact to receive a shortcut menu to perform many actions on that contact.



✍ A Hot Tip! When you Right Click on a Contact in the Main Contact Screen the Short cut menu allows you to perform many actions, such as Create Meetings and Emails through the Create item. The Short cut menus allow you work with your Follow-up and Categories, too. The Shortcut menu displayed above with the Follow-up section expanded. Outlook 2013's short cut menu expands to include Copy and Move to with additional items. ✍

Once your Follow-up date and time arrive, your item will appear in red to alert you. Outlook will remind you, too, based on your settings in your Follow-up pane.



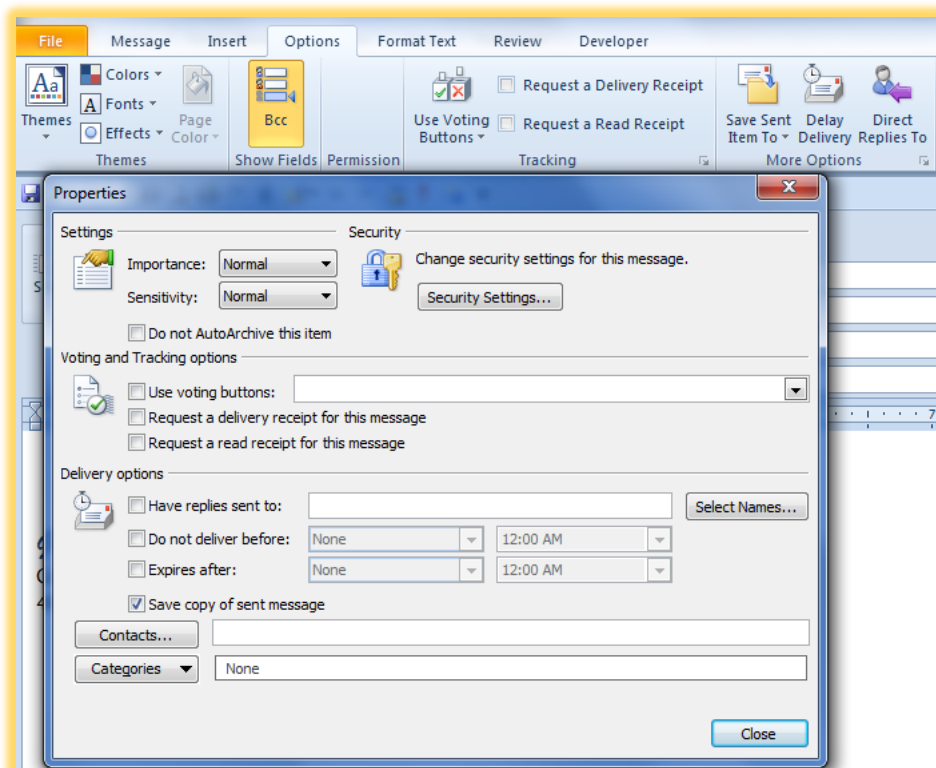
Once you clear the flag or complete it, the red disappears and a message appears as displayed at right. Notice that Outlook documents not only when the Follow-up flag is due

Follow up. Completed on Wednesday, September 03, 2008.

but also when you completed the Follow-up item.

Message Options Tab

An important tab in your E-mail message screen is the new *Message Options Tab*. The *Options tab* and the *Message Properties dialogue box* that you receive when you click the *More Options Dialogue box arrow* allow you to set your *Importance*, use *voting buttons*, *request delivery* and *read receipts* for your message, and other delivery options. You may associate contacts that are not receiving this e-mail to your e-mail message and set your *categories*, too. *Mail Format* and *Outlook Options dialogue boxes* from the *File Tab* for your mail messages affected *ALL* of your messages, using the *Options Tab and Pane* allows you to set your options for a specific message.



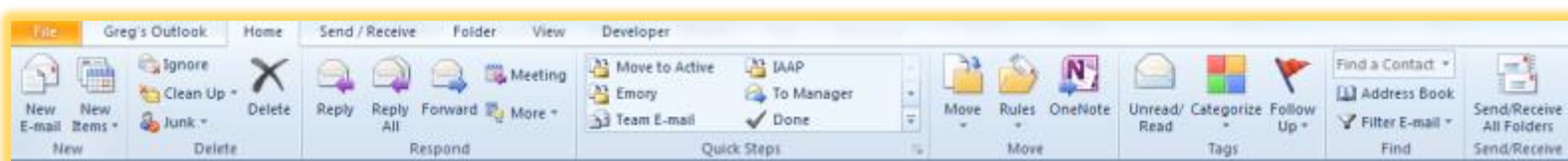
- 1. In your Mail Message, Click the Options Icon,**
- 2. Set a different theme for colors and fonts if you wish in the Themes group.**
- 3. If you wish to use or view the Bcc click that button – I am using the Show Bcc feature.**
- 4. Outlook allows you to use Voting buttons and other types of response for your emails, too.**

- 5. Set other items that you may wish for e-mail, such as Delivery and Read Receipts, in the Tracking group.**
- 6. When you use the More Options Group buttons, Outlook activates the Message Properties dialogue box for you to set your Delivery options for replies, delivery date and time, as well as expiration date and time. These options allow to set when a message is delivered or if the message expires Outlook can delete it for you or archive the message**
- 7. The bottom of the pane allows you to set your categories as we accomplished with contacts and to associate the email with a contact that is not receiving the email.**
- 8. After selecting your options, click Close in the message options pane.**

Home Tab

Like the Home Tab in Word, Excel, and PowerPoint, Outlook's object **Home Tab** provides common commands that allow you to create new items, view your items, and other features I will overview here. We will look at **Email**, **Calendar**, and **Contacts'** **Home Tabs**. Using your own Outlook folders and objects let's review these important items in Outlook.

At Home with Email



Here are some of the important items that you should use for the Email's Home Tab. So, open your Outlook at the Email object on the Navigation Pane.

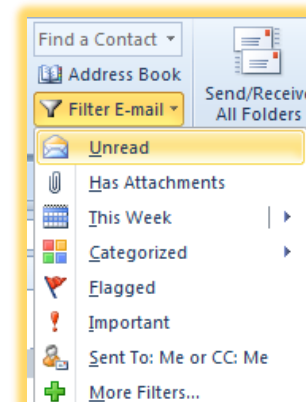
New Group – The New Group across the Outlook Application allows you to create new Emails, Appointment, Contacts, To-Dos, etc. within the Object, such as New Email. The **New Items** allows you to create items that are not part of this object, such as creating a New Appointment in the Email object. I use this so much that I have placed this on my **Quick Access Toolbar** and My Custom Outlook Tab so I am never far away from creating anything new in Outlook.

Delete and Respond – These two groups replace common icons in previous versions of Outlook. You can delete at will and use the good old Reply, Reply All, and Forward from this Group. The More button in the group permits you to forward your message in a variety of ways – as an attachment or text message.

Quick Steps – We covered this important group earlier.

Tags Group – We have looked Categories previously; you may quickly mark an email as either read or unread by clicking the **Read/Unread** button and assign a follow-up using the Follow-up Flag.

Find and Send/Receive – The last two Groups on the Home Tab are ones that I use early and often, particularly when I have many emails jamming my Inbox. The **Filter Email** is a nice addition to Office 2010 and allows you to quickly review specific emails such as **Unread**, with a **Follow-up Flag**, or **Important**. The **More Filters** option allows you to search on **Keywords** in an

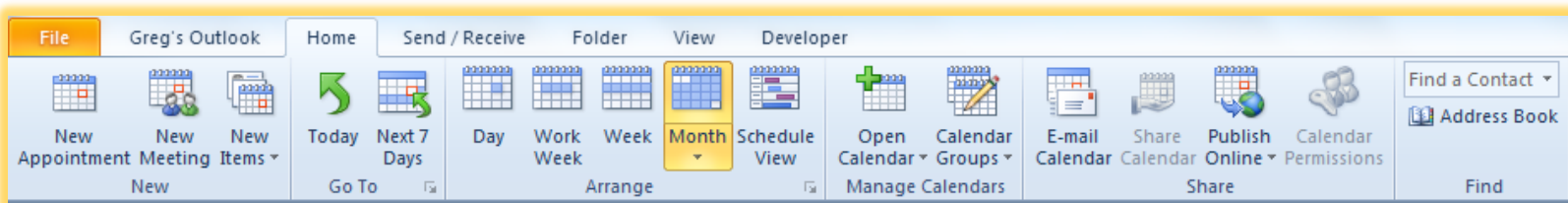


Email message and even highlights the search for you! This is very useful with hundreds (or even thousands) of email to wade through.

The **Send/Receive** forces a send/receive with a click or you may press the **F9** key in lieu of click this button. While you may set your **Send/Receive** settings in the Outlook options, at times, you will want to “force” a **Send/Receive** and this button does the trick.

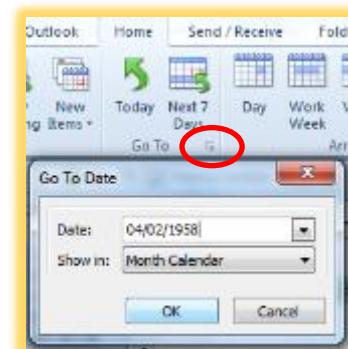
At Home with Calendar

I have used Outlook’s calendar for over 20 years and can recall meetings I held in June 1998. With each version of Outlook, the Calendar improves. ***So open your Calendar and let’s look at some of the neat features, as we review the Home Tab for your Calendar.***

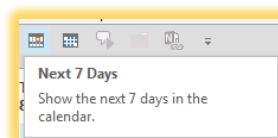


New and Go To – Like Email you may quickly set-up a **New appointment** or **Meetings** as well as other Outlook item in the **New Group**. The **Go To** group offers a quick way to navigate back to your current date using the **Today** button or to view your **Next 7 days** in the weekly view. ***I am glad that Outlook includes the Next 7 days Go To View; I have many clients request a weekly view when the week doesn’t begin on a Sunday or Monday and now we have this ability in 2010.***

When you are looking another date, navigating back to the current date is easy simply by clicking the **Today** button. If you click *the Dialogue box launcher* or Press the **CTRL + G** keys Outlook activates the **Go To Date Pane** for you to enter or select a date to navigate. I have entered my birthdate (yes, Outlook goes back that far!) and clicked ok. After I notice the day I was born, I clicked the **Today** button to travel ahead quickly 50+ years to the current date.

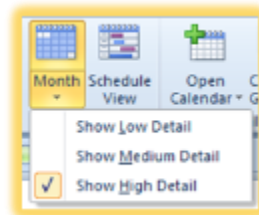


Outlook 2013 removes the Next 7 days button, so I added the button to my appointment’s Quick Access Toolbar which is displayed at right. You’ll have to



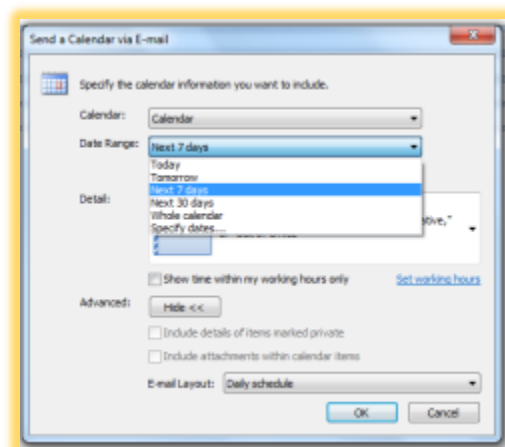
use the All Commands selection in your Customize Quick Access Toolbar menu to add this button that is not in the Ribbon.

Arrange – There are many views to explore in Outlook’s Calendar and the **Arrange Group** offers quick and easy ways to view your Calendar. You should click each one of these items to view your calendar by day, week, and month. As pictured at right, the Month view allows you to select the level of detail to view in your **Monthly View**. Also, the **Schedule View** is new for Office 2010 and is particularly useful for looking at multiple calendars and the free/busy times in one view for various calendars. We will look at this more in the **View Tab**.



Manage and Share Calendars – These Groups allow you to **Manage** other people’s calendar if they give you permission and you are using an **Exchange Server** for Outlook. You may open another Calendar (.pst) file from here, too. You can publish your Calendar to the web and you can email your Calendar. **Here’s how to Email a part of your Calendar.**

1. **Click the Email Calendar button, Outlook opens your email ready to attach and put your calendar in the body of the email and Outlook opens the Send a Calendar via E-mail pane. Select your date range or specify a custom range, decide the level detail you wish your recipient to view and the working hours or entire day/night. The Advance options allow you to show private appointments and to include attachments. The E-mail Layout offers a Daily Schedule or to List your Events.**
2. **Click OK, after confirming your date range, click Continue and Outlook inserts your calendar dates as an attachment and in the body of your E-mail.**



At Home with Contacts

The **Contact Home Tab** provides ways of managing your **Contacts**, creating new contacts, viewing your contacts, and using Outlook's **Communication tools** with your



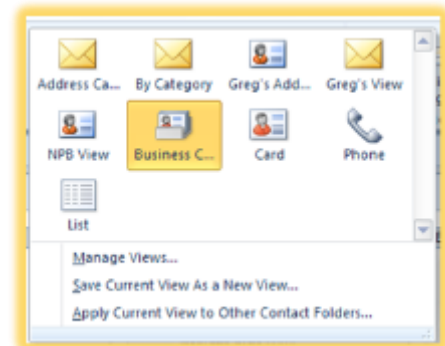
contacts.

Like with the other items in Outlook the **Contact Home Tab** includes the ability to Share your **Contacts** and use **Tags**, such as **Categorize**.

New – The **New Group** allows you to create an individual contact or you may create a group of **Contacts** (AKA **Personal Distribution List**), and to create other new Outlook Items, such as email, appointment, task, etc.

Communicate – The **Communicate group** permits you to select a contact (or contacts) and create an e-mail, meeting, task, or other items from this Group based on your select contact(s).

Current View – As with other Outlook objects views are important and easy in Outlook 2010. When you click the **See More arrow** your gallery expands for you to selected different views – my favorites are **Address Cards**, **Business Cards**, **By Category**, **Phone**, and views that I customize and save such as NPB and Greg's View. You should open your Contacts and preview each View.



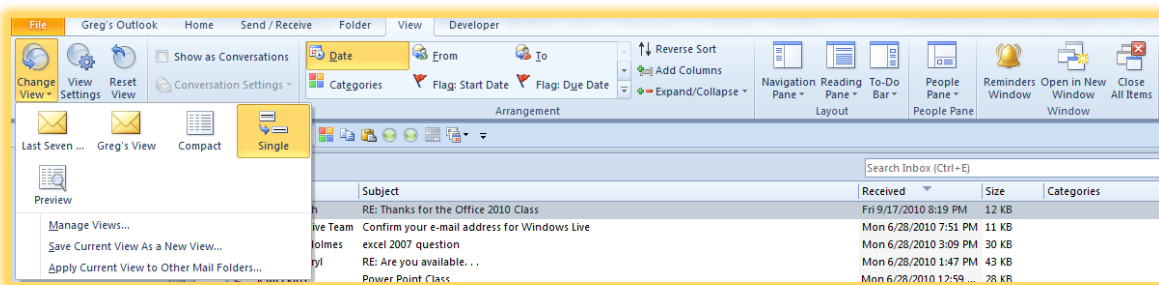
Actions and Share – The **Actions Group** allows you to quickly **Move** a contact to another folder and to active the **Mail Merge Wizard** to work with Word. The **Share Groups** offers a quick way to email your contact to another person through the **Forward Contact** command button and cascading menu.

View Tab

Due to Outlook's various object types the View Tab is important to see your information in a variety of ways and organization. We will overview E-mail, Calendar, and Contacts and some of the important Views and functions.

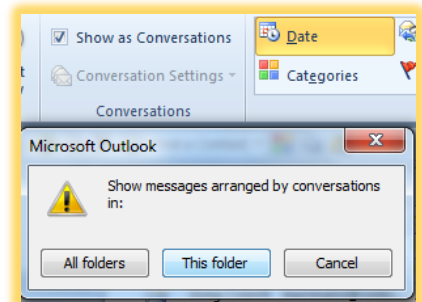
You should have an Email Folder open, such as Inbox, Sent Items, etc. and try each of these items below.

E-Mail Views

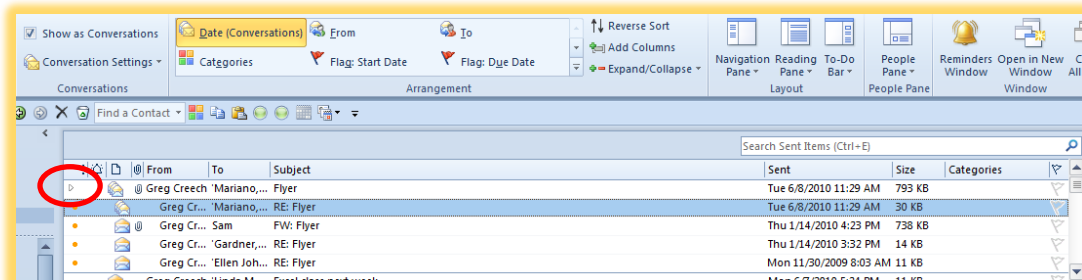


Current View - The First Group, *Current View*, on the *E-Mail* views allows you to change your *Current view* using the *Change View* and *View Settings* button. You can add fields, filters, and sorts to your current view and create your own view as I have with Greg's View. However, the default view is usually fine for most people and you can quickly sort and filter your view using the *Arrangement Group* or Click column headers, such as Subject, Size or Categories to quickly and easily change your sort.

Conversation - The *Conversations View* for E-mail organizes your email message by subject and the most current email is first and the previous emails list underneath the most current email. This view is helpful for consolidating and organizing any length email exchange of replying and receiving emails about a common subject from several people. When you click the *Show as Conversations* box to check it, Outlook asks you which to folder to apply the view all



folders or this folder. I usually only want the current and active folder I'm working

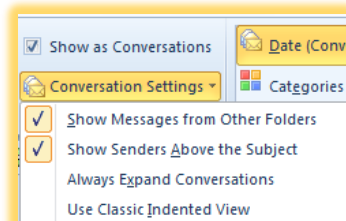


in for this view. I have displayed here my **Conversations view** of a Subject of Flyer.

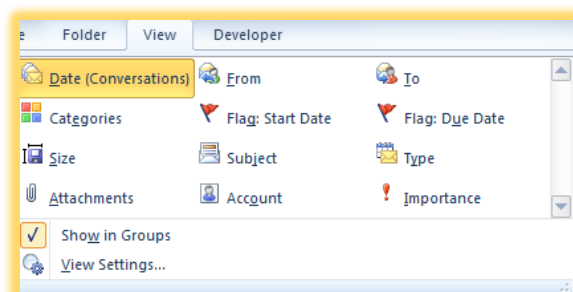
This assembled all

emails with the subject Flyer for me. The arrow circled above allows you to expand and to collapse your view so you may see the detail messages or not. The **Conversation View Settings** allow you to display messages from other folders that use the same **Subject**. You may **Expand the Conversations** automatically, too; I usually like to use the arrow as described above to expand my conversation for a particular subject and email.

Click **the Show as Conversations** again to uncheck it to turn off this view when you are finished.

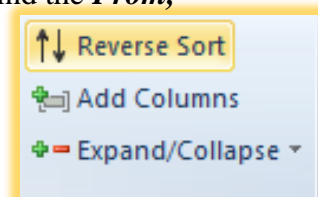


Arrangement – The **Arrangement Group** is an important Group for Email. This pane allows you to click and select various sorts and views. By default your emails are sorted and organized by date from the most recent. However, you will want to see your emails sorted and organized differently at times and this pane at right helps you accomplish sorting and viewing quickly and easily.

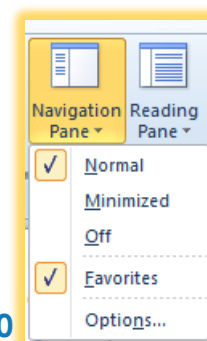


With your email Inbox or other folder open you should try these different views and sorts to understand what each will accomplish. I find the **From**, **Size**, **Account** (since I have four different email accounts that feed into Outlook), and **Attachments**.

The **Reverse Sort**, **Add Columns** and **Expand/Collapse** changes your views, too. I have added columns such as **From**, **Categories**, and others. You can quickly **Expand and Collapse** your groups; however, you may find using the small arrows next to your Groups just as easy to expand/collapse your information. The **Reverse Sort** is a button that I rarely use, because I sort by clicking the column header. **Clicking a column header such as Received, To, From, or Subject changes the Sort for you in Ascending Order and clicking the Column Header again changes to sort to descending.**

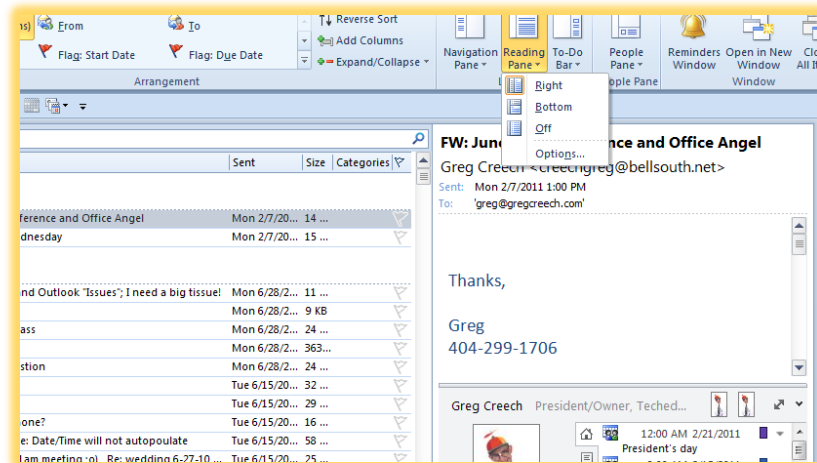


Navigation Pane – The **Navigation Pane** is integral in moving around in Outlook and activating your objects. I always have my **Favorites** active, since I have so many folders, I like using the **Favorites** by having my often used **Folders** at the top of the **Navigation Pane**. I use the **Minimize arrow** on the **Navigation pane** to Minimize my



Navigation Pane I do not use the cascading menu at right. For **Options** I have all of my Outlook objects in my Pane, such as **Journal, Notes, and Shortcuts**. I never turn off my **Navigation Pane**.

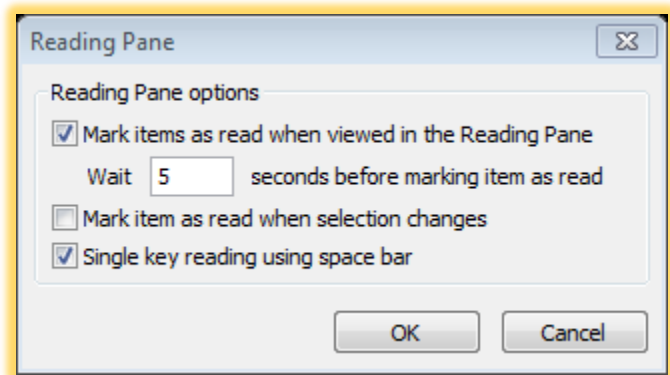
Reading Pane – As old timer of Outlook I prefer my **Reading Pane** at the bottom of the screen and this increases my ability to perform sorting and other functions easier than having the pane at the right. I am displaying my **Reading Pane** at right and have increased the width of my inbox so the column headers appear for me to sort. My **People pane** is beneath the **Reading Pane**.



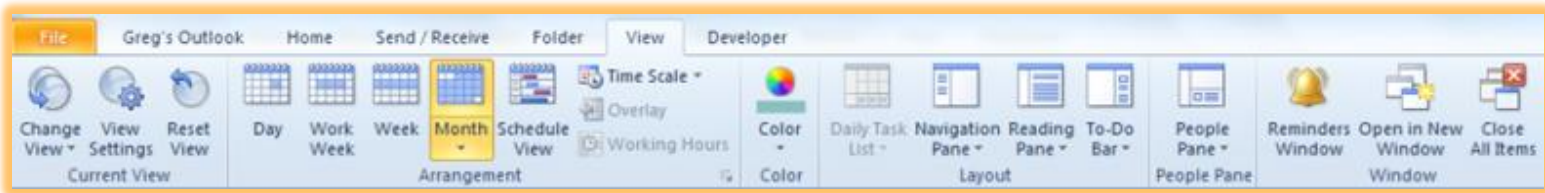
The **Options** for the **Reading Pane** are important for you to set. For example, I have unchecked the **Mark item as read when selection changes**, because I will accidentally move from one message to another and not realize that I have moved and the message becomes unread.

Therefore, I have changed my options to **Mark items as read when viewed in the Reading Pane**

for 5 seconds – this provides enough time for me to realize I have the message selected and to preview the message. I like the **Single key reading using space bar** because this scrolls through your message in the **Reading Pane** when you press the space bar and when you reach the end of the current message Outlook navigates to the next message as you press your space bar and continue to scroll through your text and other messages.



Calendar Views



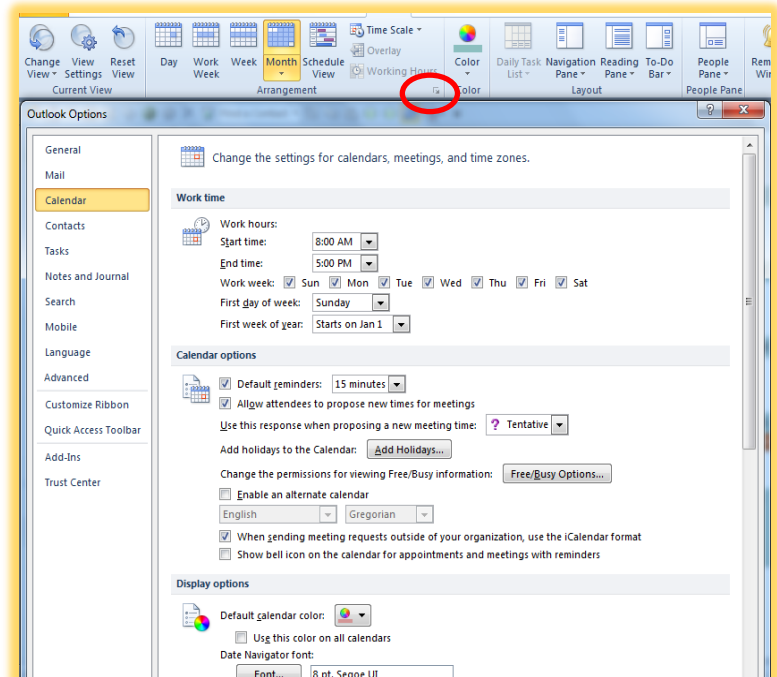
Current View - Like E-mail, you may change your View in the *Current View Group* and like E-mail, you have the *Navigation Pane*, *Reading Pane*, *To-Do Bar*, and *People Pane* features here with similar options, so I will not review these items. You can decide for each Outlook object if you want these panes visible or not. We have previewed the *Arrangement Group* in the Home Tab, but we will concentrate on the New Feature of *Grouping your Calendars* and using the New *Schedule View*.

The *Change Views* pane and gallery displays at right for you. Generally, I like my Calendar in a Calendar View such as *Day*, *Month*, or *Week* but there are times I like viewing my Calendar a table format such as *By Category* or *List*. This pane makes it easy to change your view from a Calendar view to a table view. You should look at *List* and if you use Categories by *Category* views. When you change your View to a table view, your *Arrangement Group* changes with similarities of E-mail to add columns, reverse sort, and so on.



With your Calendar open change your Views and then look at your Calendar in all of the Arrangement Views such as Day, Week, and Month.

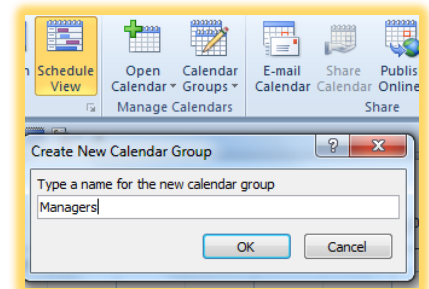
Arrangement - When you click the *Arrangement Dialogue Box launcher*, Outlook opens your *Calendar Options* for you to set important items, such as your workweek and time, using more than one time zone, Adding Holidays, and setting your default color. You should review



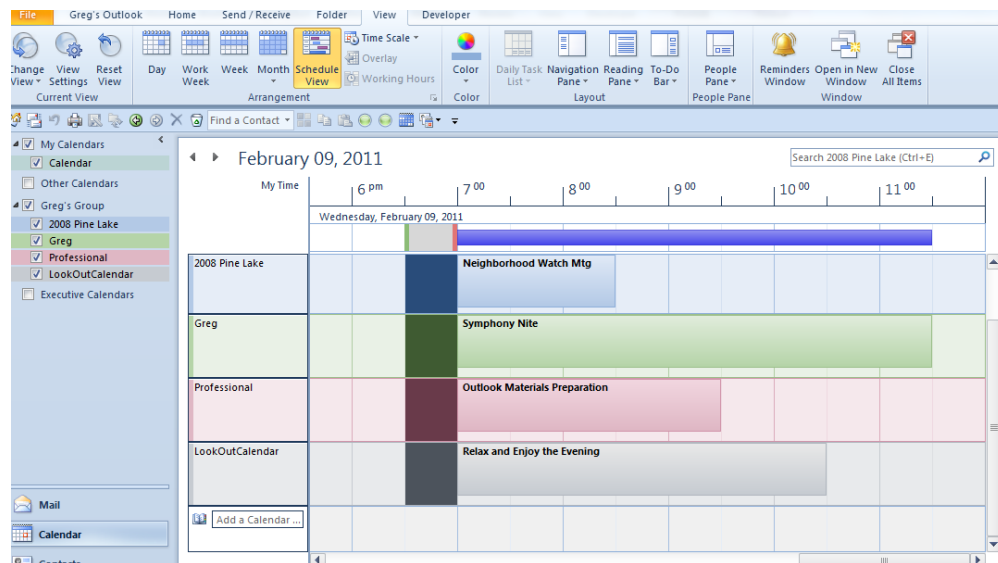
these options to decide which work best for you and your calendar.

Outlook Schedule View and Calendar Grouping

You can create a grouping of calendars for other people, resources, etc. and click a check box to display your individual and group calendars. Outlook expands the view for Meetings into the ***Schedule view***, so that now you can view multiple calendars in a more comprehensive and helpful view by dates and timeframes (you may change the timeframe in increments such as hourly, 30 minutes). You may create a ***Group*** using the Home Tab, as displayed at right. I am naming a Calendar Group Managers; after clicking OK Outlook takes me to the contacts I want to use for the Calendar. The Exchange Server, Delegates, and Permission may or may not allow this feature for you. I created several calendars and use the Grouping feature for those calendars. You can change a Calendar from one group to another by clicking and dragging. As displayed below, you can see how nice

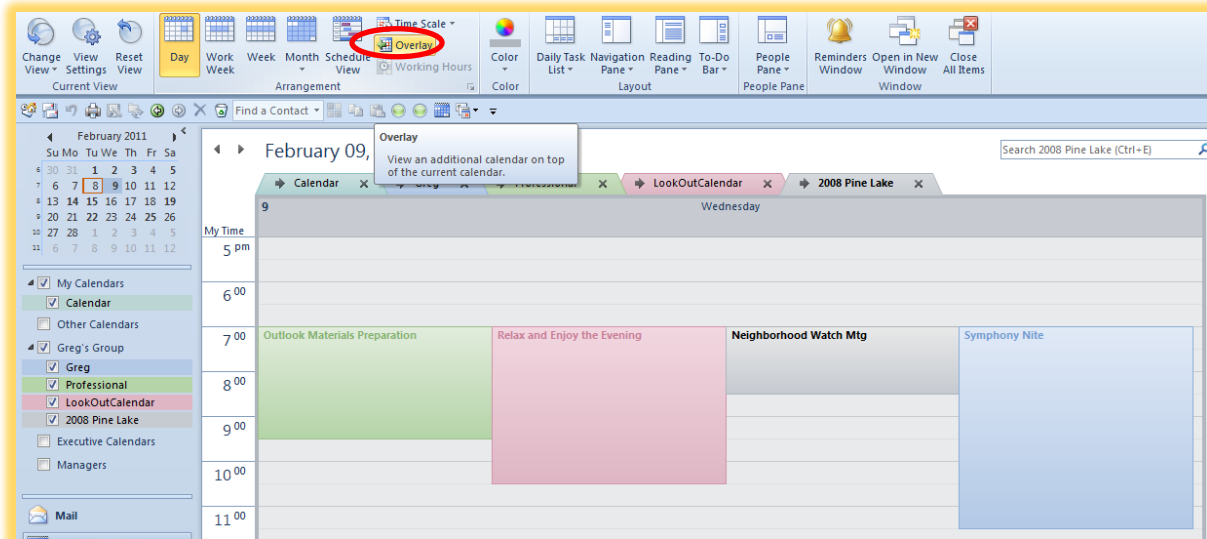


using ***Schedule view*** is for these Calendars showing me the events for different Calendars at 7:00 PM on February 09, 2011. Also, notice the different coloring of the calendars for organization and ease of viewing. The ***Navigation Pane*** makes it easy to check a calendar on to display or uncheck to hide the calendar or Group.



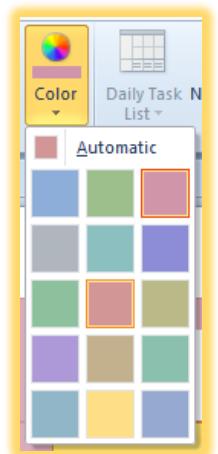
This is a nice and neat new feature of Outlook 2010.

If you do not use the *Schedule View*, but prefer the Day, Week, or Month views, Outlook uses the *Overlay Mode* as displayed here for you. With Multiple Calendars selected or using a *Group*, you may use the view displayed below. Notice the arrows at the Tab for

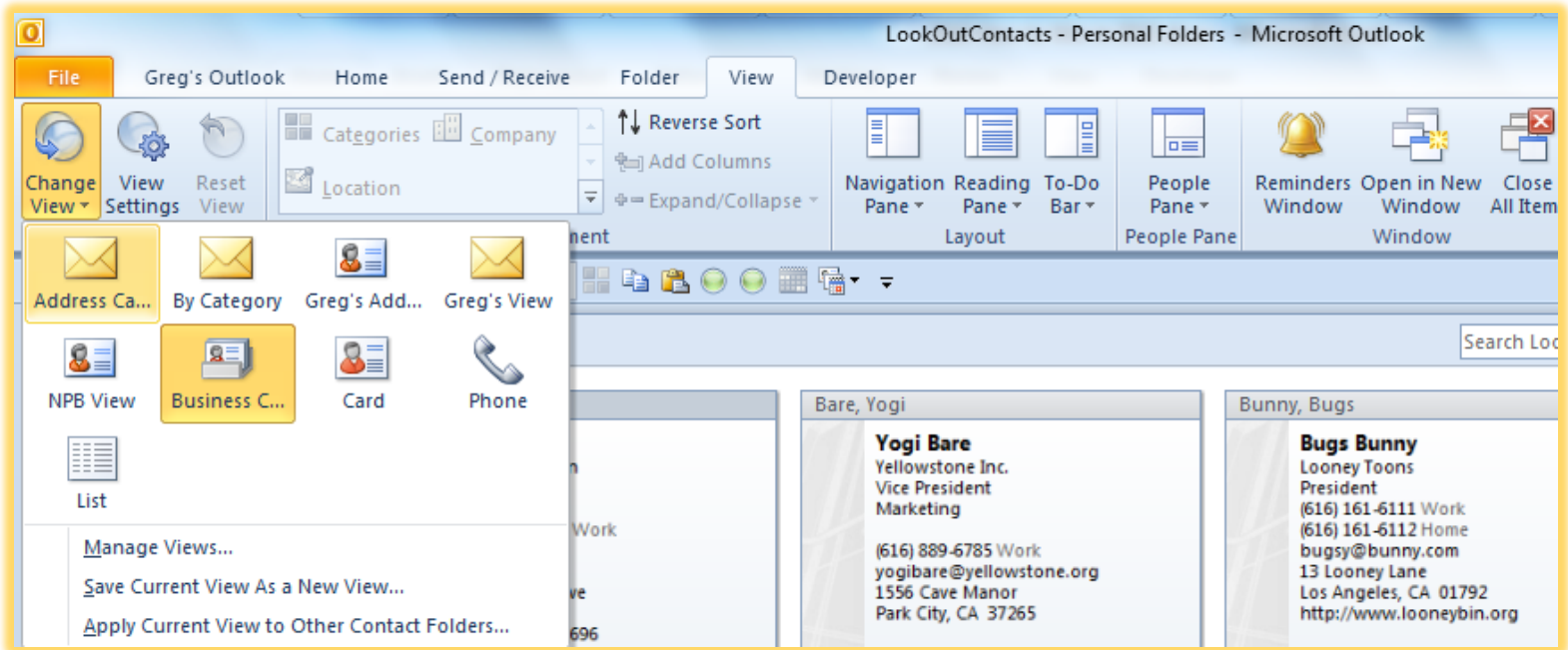


the Calendar you can click the arrow to remove this from the *Overlay* mode. You cannot use the *Overlay* Mode with *Schedule View*. I like using both depending upon my needs of viewing multiple calendars as if they were one.

Color – You may color your Calendar quickly and easily using the *Calendar Color* Button displayed here.



Contact Views

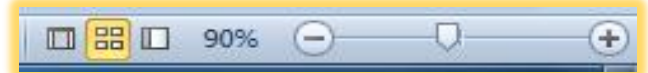


Your *Contact Views* offer many ways of reviewing your contacts. I have displayed my information in *Business Cards*. Using the *Current View Group*, you may look at your information as *Address Cards*, create your own view, or look at your information in a table format using the *Phone* and *List* views.

Arrangement – The *Arrangement Group* for Contacts will not activate until you view your information in a *Table* view, such as *By Category*, *Phone*, or *List*. From here you can sort by several ways and view your information differently and Add Columns, etc. With your *Contacts* in a view, look at these different views, especially *List* and *Phone* View.

View Shortcuts

Outlook provides simple **View Shortcuts** to turn on and off the **To-Do Bar**, **Navigation Pane** and other views. The **View Shortcuts** appear on the **Status Bar** next to the **Zoom Slider** at the bottom right of your screen and the **Calendar and Contact View Shortcuts** are pictured below. Click these in your various views to see the effects of **Normal**, **Classic**, **Address Cards Only**, and the other views available at a click. The **Calendar Shortcuts** appears at left and **Contact Shortcuts** at right with the **Zoom Slider**.



Outlook 2013 has the **Reading View** and **Normal View** and that's it for the Outlook objects. These quick views expand your Navigation Pane and other panes, such as the To-Do Bar or the Reading view minimizes the Navigation Pane, and other panes for you. I particularly like using the Reading view when I am viewing Outlook items side-by-side using the **Open In New Window** feature that we will learn.

Office 2013
Feature

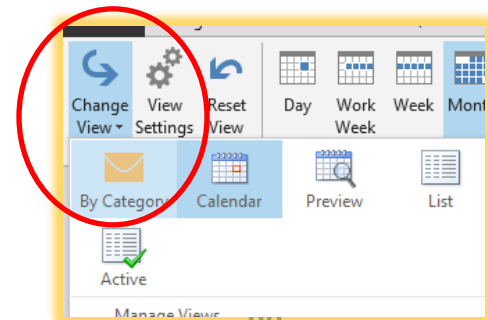


Categories View

As we have seen, Outlook has many different types of views in which to work with your Outlook objects. Mail and Tasks views are in a table format and Calendar and Contact views are in special views for seeing your information in calendar formats and contacts in business card, address card and other formats. Using a table view for Calendar and Contacts is popular. We will learn how to view our information using the Categories that we created earlier.

I have used Categories in Outlook for many years and I have organized my business tremendously using Categories. In the Categories View, I can send emails, create meetings and appointments, and perform other tasks, such as a Mail Merge with Word.

I'll use my calendar and contacts for my Category viewing.

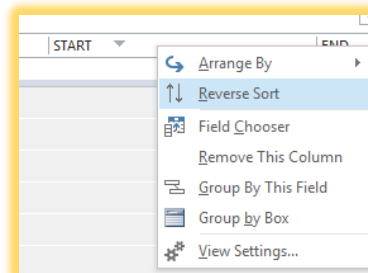


1. In the View Tab and the first group, click the Change View button for a gallery of views. Click the By Category button.
2. Your view changes to a table view with column headings and your information in columns. Using the Expand/Collapse button on our Quick Access Toolbar or the button in the Ribbon and the View tab makes organizing your information easy. I collapse all of my Category groups and then I click the Expand arrow to view my details. Below I have expanded my Excel category to view where I'm teaching Excel and any item on my calendar using the Excel category.
3. Using this view, I can quickly sort my information by clicking the

	SUBJECT	LOCATION	START	END	RECCURENCE PATTERN	CATEGORIES
	Click here to add a new Appo...					
▲	Categories: Excel: 529 item(s)					
📅	Emory Excel Level 2		Wed 8/31/2016 8:00 AM	Wed 8/31/2016 5:00 PM		Excel
📅	Emory Excel Level 2		Wed 8/24/2016 8:00 AM	Wed 8/24/2016 5:00 PM		Excel
📅	Excel Level 3		Wed 8/17/2016 8:00 AM	Wed 8/17/2016 5:00 PM		Excel
📅	Data Analysis using Excel (Emo...		Fri 7/29/2016 8:00 AM	Fri 7/29/2016 1:00 PM		Excel
📅	Emory Excel Level 2		Thu 7/14/2016 8:00 AM	Thu 7/14/2016 5:00 PM		Excel

column header or I can right click the column header for a more extensive menu that includes Sorting. The shortcut menu for my Start Column displays here.

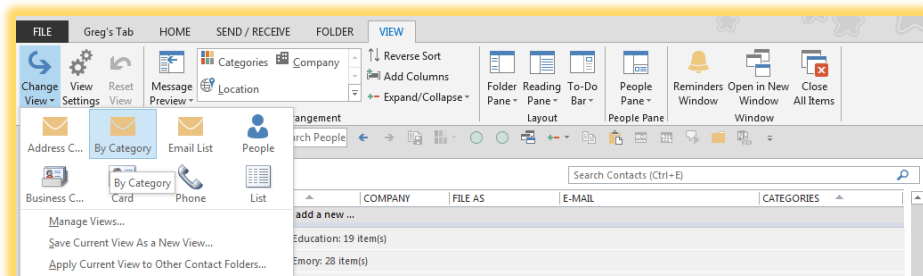
4. After using my Category view, I change back to my Calendar view using the Change View button.



Like Calendar, I like using categories with my Contacts, too. The process is the same in view your information in a category view.

🔥 A Hot Tip: Using categories for your contacts allows you to assign one person to multiple categories and you may use a category to create a mail message or a meeting. 🔥

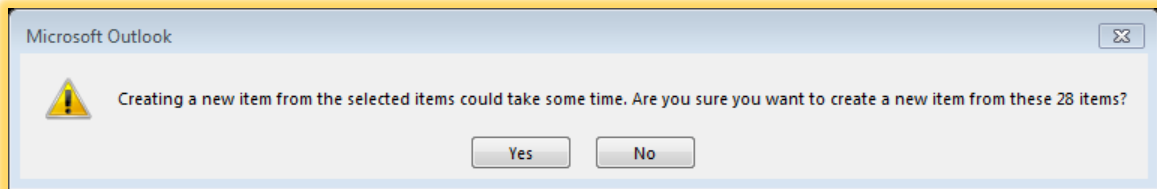
1. In you contacts view, Click your View Tab and Change View and from the gallery click By Category.
2. Like calendar, Outlook displays





your contacts in a table view with columns and column headers with which to sort and organize your information.

- 3. If you click a category header and drag it to your Mail item, Outlook may create an email with the email addresses in the To field based on the category. The message below appears**



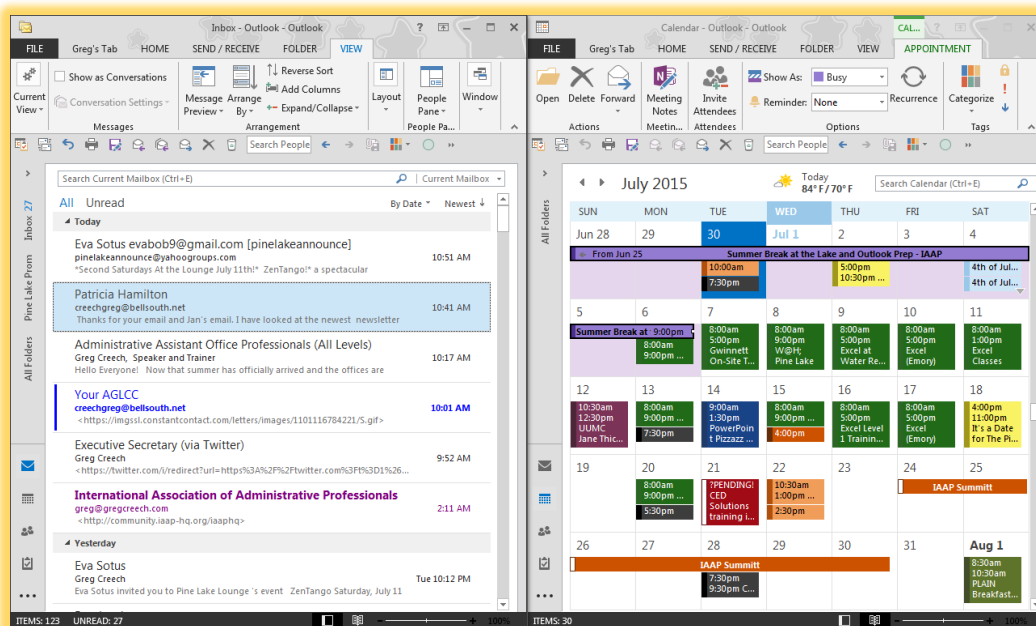
informing that this could take some time to create. I click Yes and my new email with the addresses appears ready for me to compose and send. OR Outlook creates an email with the contacts' information.

Open In New Window

At times you will want to view two Outlook objects simultaneously. For example, I like viewing my Inbox and my Calendar side by side or my Inbox and my Sent Items side-by-side. Using the *Open in New Window command* in the View tab allows you to open Outlook twice to view objects and folders side-by-side. I add the *Open in New Window button* to my *Quick Access Toolbar* and my custom tab in the Ribbon, so I don't have to go to the *View tab* to use this command.

Let's use Open in New Window to view our Inbox and Calendar side-by-side.

1. Be in your inbox and from the View tab click the Open in New Window button.
2. Outlook opens your Inbox in a separate view. From this view, click your Calendar in the Navigation pane and Outlook displays your calendar in the window.
3. Using the Windows snap feature position your Calendar on the right side of your screen and then move your Inbox by clicking and dragging the title bar to the left part of your screen.
4. My Inbox and Calendar appear side-by-side below and both are in the Reading view mode. You may maximize the window in which you wish to work and Outlook keeps the other window open for you to toggle back and forth if you like.

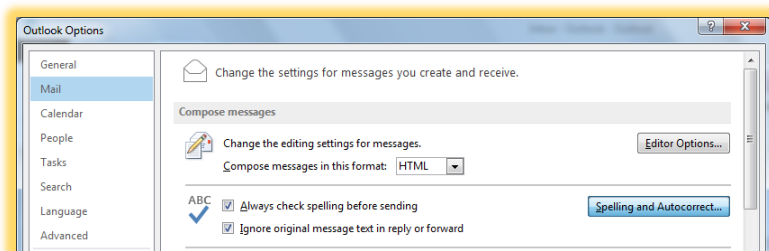


AutoCorrect

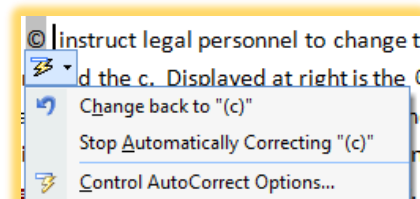
Using **AutoCorrect** features in the Office Suite can be one of the most productive tools in the applications and it can be one of the most frustrating tools in the applications.

Although clients learn this feature and trainers/consultants try to emphasize this important feature, it still goes underutilized. Knowing that **AutoCorrect** is where the Office suite changes the word about to about and that AutoCorrect is where you turn off some annoying self-correcting items, such as capitalizing the first letter of a sentence. I have a client that doesn't use capital letters in her name, I have a customer whose name begins with two capital letters, and I may have a customer named About – AutoCorrect could drive me crazier than I am, if I didn't know how to change or stop these automatically altered items. You can

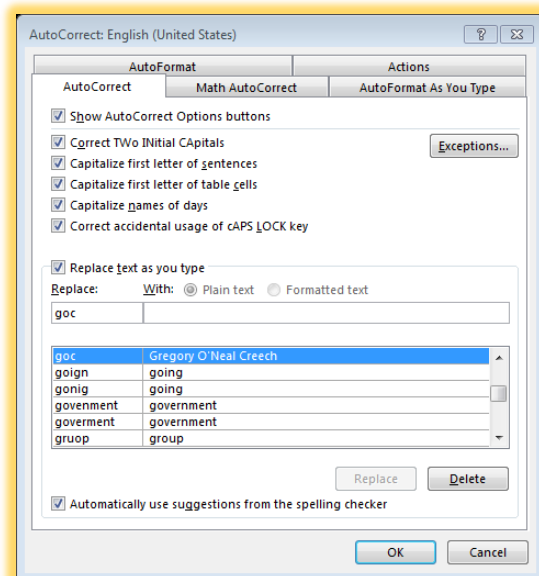
always activate the **AutoCorrect** features through the **File Tab**, clicking the **Options** button at the bottom of the pane, and from the **Options** screen and the **Email** item and the item, and finally clicking the **Spelling**



and **AutoCorrect** button as displayed at right. This feature spans the Office Suite in one form or another. When you use an **AutoCorrect** feature or item a small, blue rectangle will appear under the **AutoCorrect** word or item, clicking the little, blue bar will activate the **AutoCorrect** Options icon (it has a lightning bolt). One of the most annoying items for the Legal Profession is AutoCorrect's using the (c) to change to the copyright symbol ©. I instruct legal personnel to change the AutoCorrect feature to use dashes or another symbol to surround the c. Displayed at right is the AutoCorrect Options. This is a great utility to be familiar with and to use often. Displayed at right is the full **AutoCorrect Options menu** that activates through the Mail Options or from the AutoCorrect box's Control AutoCorrect Options.



☺ Notice this happy face – AutoCorrect can enter this for you by typing a colon : and a closing parenthesis) or ☹ the



frowny face (this is what I use for the Important Gotcha's in this book) is the colon : and opening parenthesis (. Try it, you'll like it.

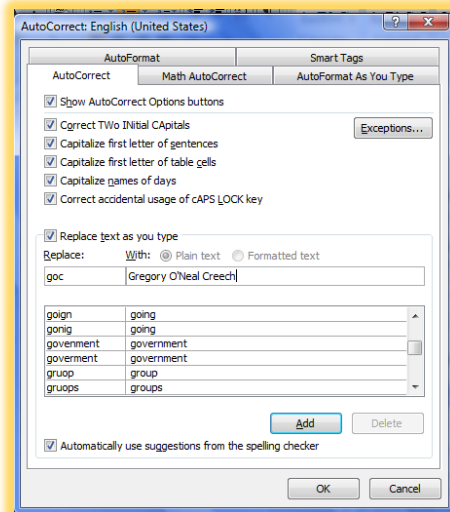
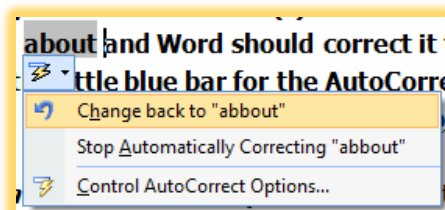
Here are some of the important reasons to use AutoCorrect:

- ✓ Automatically capitalize acronyms,
- ✓ Correctly spell words that you typically misspell,
- ✓ Automatically types your name, address, etc with a "code" or keyboard shortcut,
- ✓ Automatically enters entire paragraphs, letters, and disclaimers with a "code" or keyboard shortcut,
- ✓ Insert your favorite symbols and characters with a "code" or keyboard shortcut.

☹ **An Important Gotcha!** If you use the "Stop Automatically Correcting" item on the AutoCorrect Options Icon Shortcut menu, it will **DELETE YOUR AutoCorrect ENTRY**. Word will not only stop automatically correcting for this incident of AutoCorrect but also for all future items; you will have to add the AutoCorrect Entry, again for it to be available. The Change back to option will facilitate most of your AutoCorrect nuisances. Anytime AutoCorrect is used by Word a blue bar underlines the item waiting for you to click it to get the AutoCorrect icon. ☹

Let's learn the important features of AutoCorrect

1. **Open a new email type your name and then (c) and the Copyright symbol should appear or type abbout and Outlook should correct it to about.**
2. **Return to the item, and click the little blue bar for the AutoCorrect Options**
3. **Change it back to the original input of (c) or "abbout" – this is pictured at right.**
4. **Return back and click the Control AutoCorrect Options to activate the menu below. Notice the options that you can have AutoCorrect perform for you, such as Capitalize first letter of sentences, if you uncheck this it will not automatically correct for you. Notice the area where you can edit or input new AutoCorrect items.**

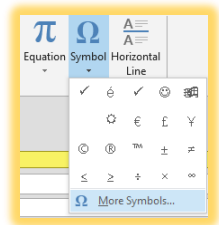


AutoCorrect Symbols

The copyright © AutoCorrect option we entered earlier is a symbol. AutoCorrect has other symbols for trademark ™ (type (tm) to enter this for you), registered trademark ®, (type (r) for this). Also, I showed you the smiley and frowny faces and the keystrokes – these are a type of symbol, too. Symbols are a type of font and include other fonts like Webdings, Wingdings (displayed at right), and other special fonts. While these may not look like fonts, they are. You may format them, as with any font, such as size, color, and other formatting. Let's create our own AutoCorrect symbols, as I have accomplished with this book for the notes ♪ and the jalapeño pepper 🌶. Let's accomplish this together following the steps in the next section.

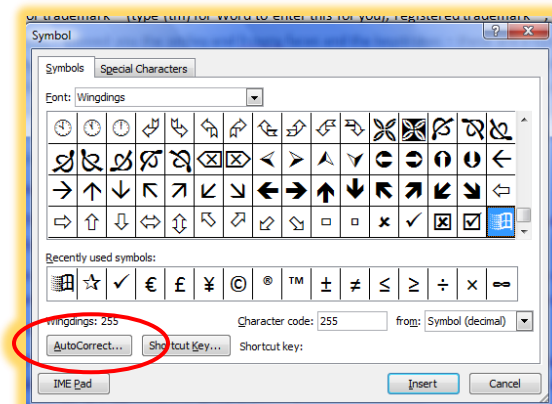
Here's some important notes on Symbols and AutoCorrect

- ✓ *The Symbol dialogue box activates through using the Insert Tab on the Ribbon and selecting Symbol and clicking More symbols as displayed at right.*
- ✓ *In Word, you may activate this menu through the Home Tab item and then Bullets and Define New Bullets as we accomplished earlier.*
- ✓ *Using symbols with AutoCorrect is very popular for engineers, accountants, linguists etc to add items such as degree symbols, foreign currencies, and other language's special characters.*



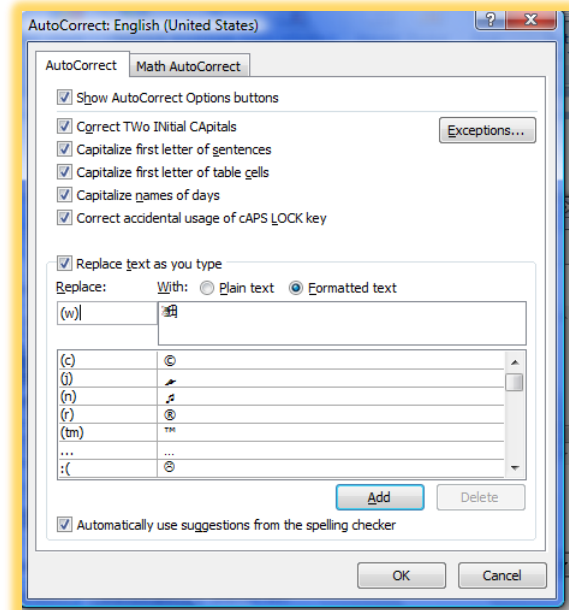
Let's use the symbol dialogue box and create an **AutoCorrect** entry for it. Outlook allows you to insert a symbol AND go to AutoCorrect or assign a keystroke for your symbol.

- 1. In a blank email, click the Insert Tab and the Symbol button.**
Notice the predefined symbols in your gallery that you may use.
- 2. Click More Symbols. . .**
- 3. The Symbol Dialogue box appears.**
- 4. Choose the font you wish to work with (Webdings and Wingdings are popular symbol fonts, as I related earleir).**
- 5. Next select a symbol by clicking it.**





6. Click the AutoCorrect button at the bottom of your pane.
7. The AutoCorrect dialogue box opens with your symbol in the With section.
8. Next type your keyboard strokes for this symbol in the Replace box – I have typed (w) for my Microsoft Windows symbol.
9. Click Add
10. Next click OK.
11. You return to the symbol dialogue box. Next we'll give this another keyboard shortcut. ♪ CARE should be used in assigning keyboard shortcuts because many keyboard shortcuts are already assigned in the Office applications – you don't want to overwrite important shortcuts like CTRL + C which is the shortcut for copy. ♪ I'm not using a Shortcut Key for my entry.
12. After adding your symbol to AutoCorrect in Outlook try it out on a new email.

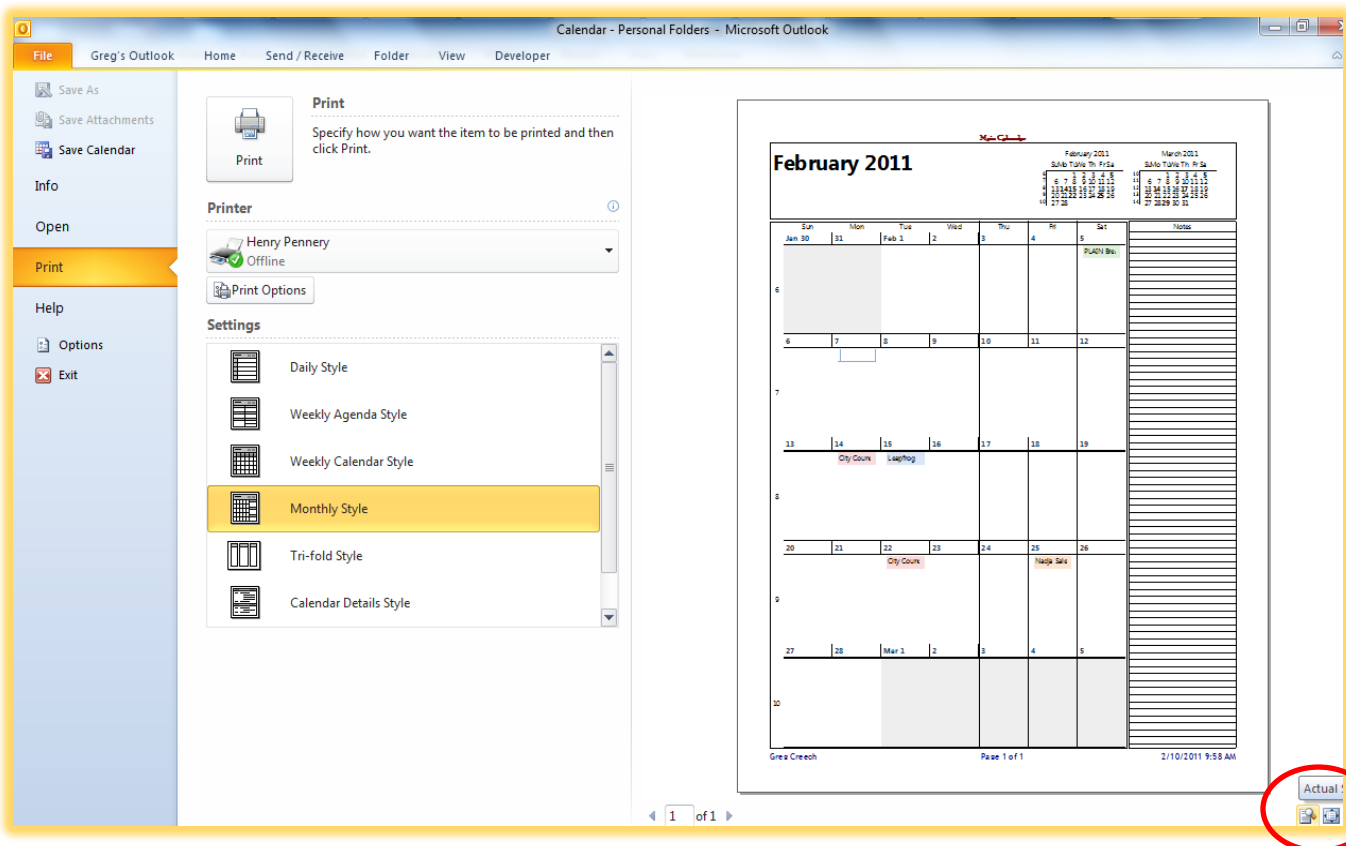


Printing in Outlook

Calendar

Like the other Office Applications, Outlook uses the *New Print pane in the File Tab*. I will use *Calendar* and *Contacts* for these examples of Printing in Outlook and using the new Print Pane.

With your calendar open, press the CTRL + P keys or Click the File Tab and then Click the Print item to view your Calendar. I am viewing my Calendar in Monthly Style – click each one of these options to view your Calendar in the different styles. You may click in your Calendar in the Print Preview Pane to Zoom and you may use the buttons in the lower right corner of the screen to change your viewing area, too. I have circled the view buttons at the bottom of the screen for you to try different views, such as Actual Size or One Page.

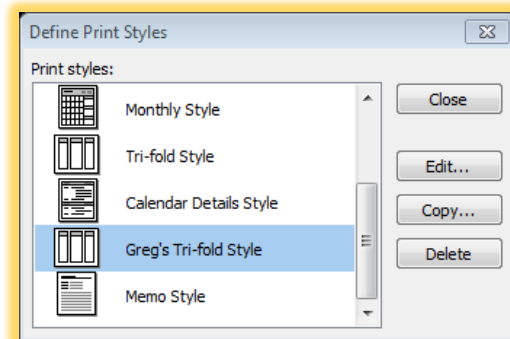
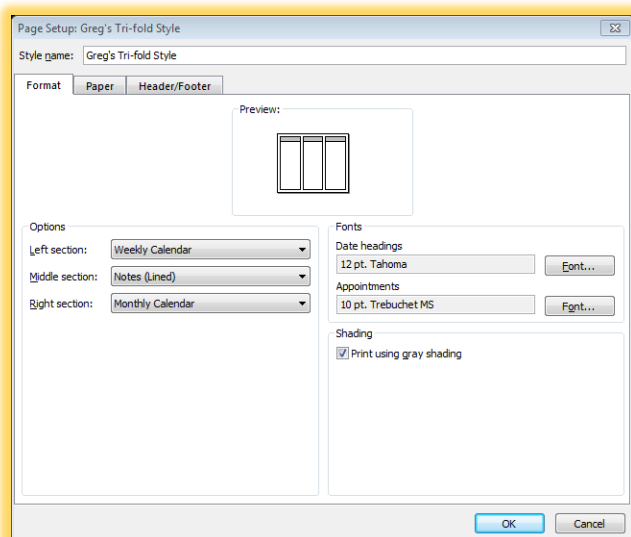
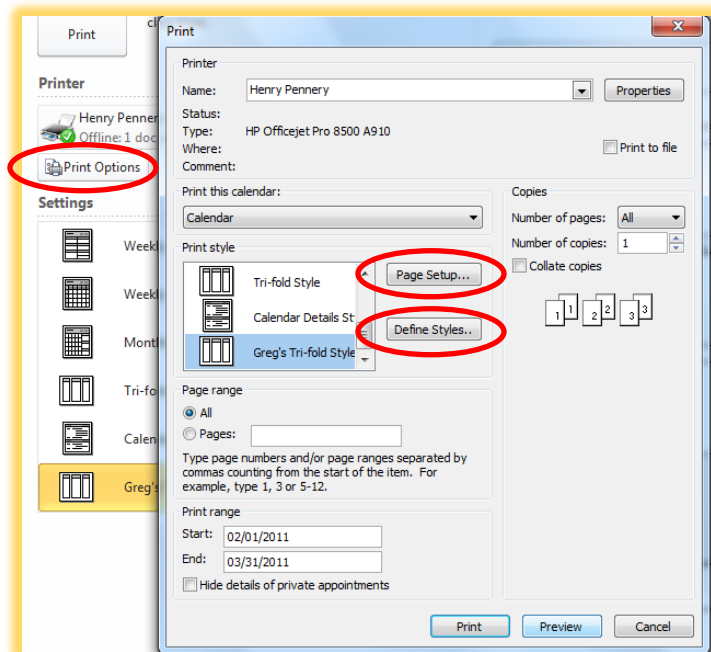


An important button for you to customize your **Printing** and **Page Layout** is the **Print Options** button as circled at right for you. This **Print dialogue box** is important for these reasons:

- ✓ Set your Number of Copies,
- ✓ Choose a different Printer,
- ✓ Set your Print Page Range,
- ✓ And VERY important – Choosing your Date Print Range at the bottom of the pane.

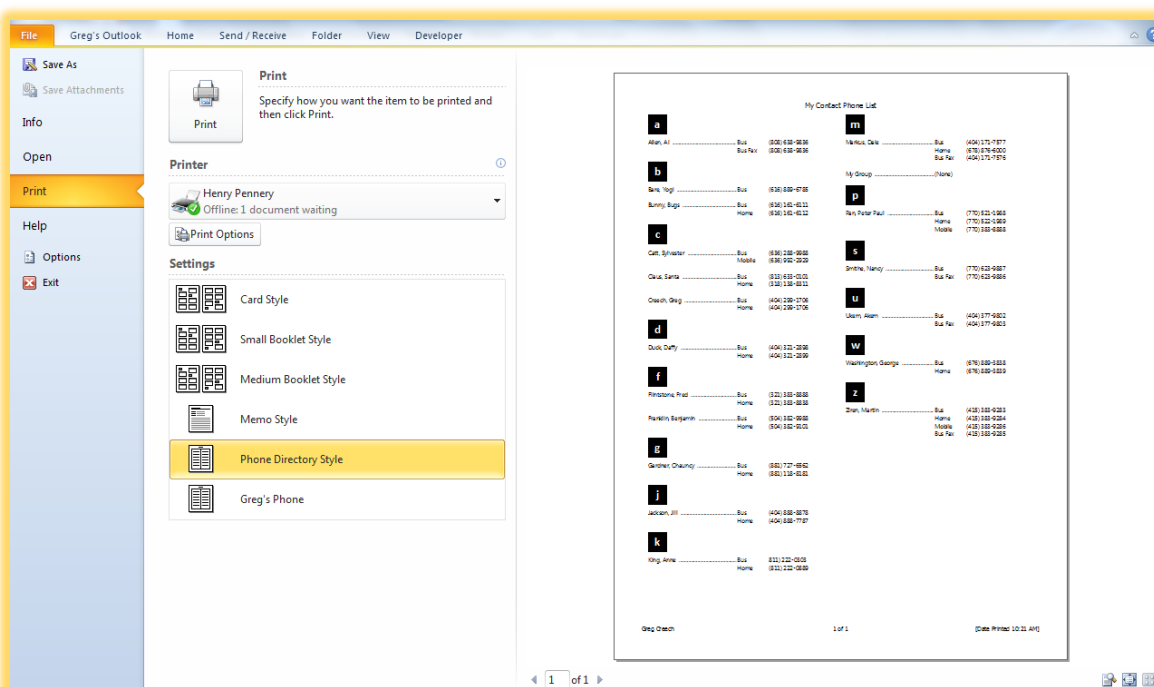
I have my own **Print Style** for **Tri-fold printing** that I am setting my date range and other items. The **Page Setup** button, also circled, allows you to create your **Format** (Displayed Below), **Header/Footer**, and type of paper, etc.

The **Define Styles** allows you to create your printing style as I have accomplished with my Tri Fold Style. **After making your changes Clicking Preview returns you to the File Tab.**



Contact

Like ***Calendar***, ***Contact printing*** has plenty of various ways of printing your contact information from card styles to phone list as I have displayed here. You can create your own style and change your ***Header/Footer***, paper and other items using your ***Print Options, Page Setup, and Define Styles*** button as we accomplished with the ***Calendar***. Open your ***Contact folder*** and Press ***CTRL + P*** or use the ***Print item in the File Tab*** to view your ***Contacts*** in the various styles to print.

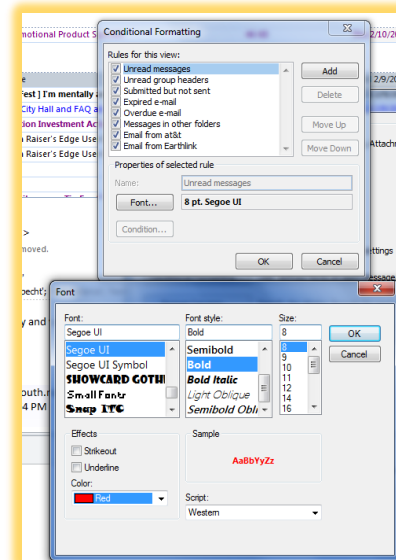
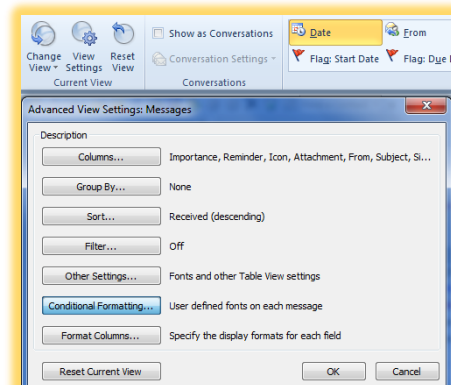


Organize and Automatic Formatting: Gone but Not Forgotten

Conditional Formatting

Outlook 2010/2013 does not have two popular previous features of Outlook – Organize and Automatic Formatting. Outlook users enjoyed using these features to color code messages based upon criteria, such as who sent a message, account used to send a message, items in the subject, and the list goes on. People liked to changed Unread Messages that are bold to include a color to give another indication that this was a New, Unread Message. Outlook 2010/2013 uses Conditional Formatting under the View Tab and View Settings. Here is an overview of using the replacement for Organize and Automatic Formatting; I am setting a color for messages I receive based on the account the message is sent – I have five email accounts and color code each one.

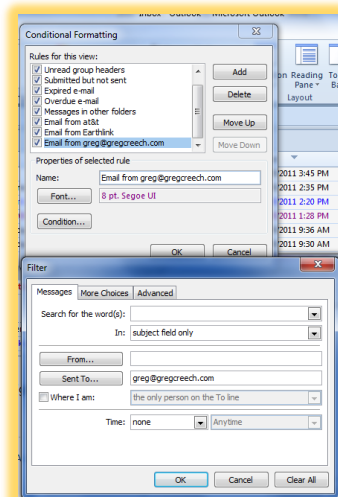
- 1. You should have your Email and Inbox in view.**
- 2. Click the View Tab and Click the View Settings Button.**
- 3. The Advance View Settings Manager Pane opens.**
- 4. Click Conditional Formatting and the Conditional Formatting Pane opens. There are several formats that Outlook uses by default, such as your unread messages being bold. With my Unread messages selected, I clicked the Font button to change my formatting so my unread messages will use the color red and include the bold. My panes are displayed at right.**
- 5. I have added new Conditional Formatting that once I read a message the message unbolds but changes color based on the account that I received the message. For example, when I receive message to**



my fsdf.com account the message in in blue and when I receive messages from greg@gregcreech.com and read them the message is in purple, etc. I created the new Conditional Formatting by clicking the Add button at the Conditional Formatting pane. I gave the action a name, changed my font to purple, and then clicked the condition button and from the filter pane entered the criteria for the formatting. I clicked OK several times and any messages from this account the font turned purple.

I know this was easier in previous versions of Outlook and perhaps Organize will be back in Outlook 2020!

You may set all types of formatting based on who the message is from, accounts, and many choices.



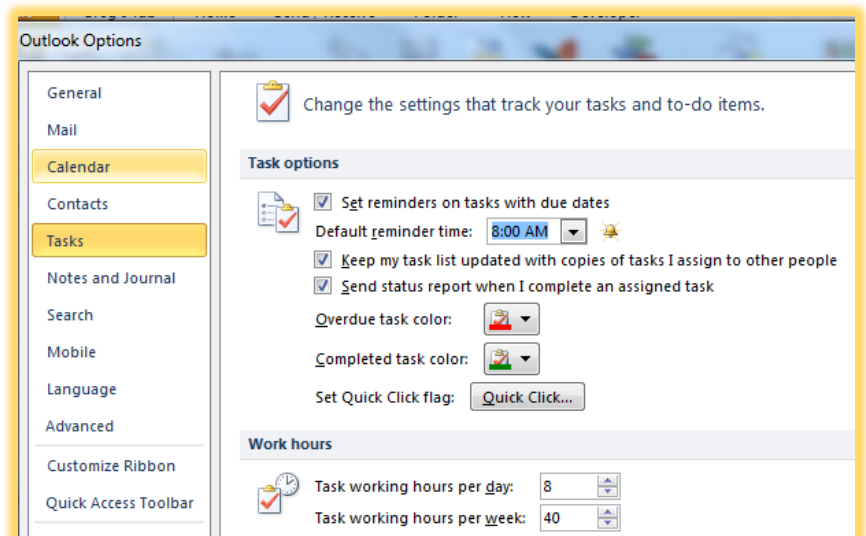
LookOut! The Task Master

Tasks are a good way to track your progress and document your projects as you are working on them. **Tasks** have very similar buttons and interface much like the other objects we have studied and should be familiar to you. You can create all kinds of tasks and assign them to others and track the progress of the task.

Task Options

Using the Options button in the File Tab and selecting the Tasks object provides the menu below for your colors and other options.

From here you may change your colors, set your reminder time, and decide your workweek hours.

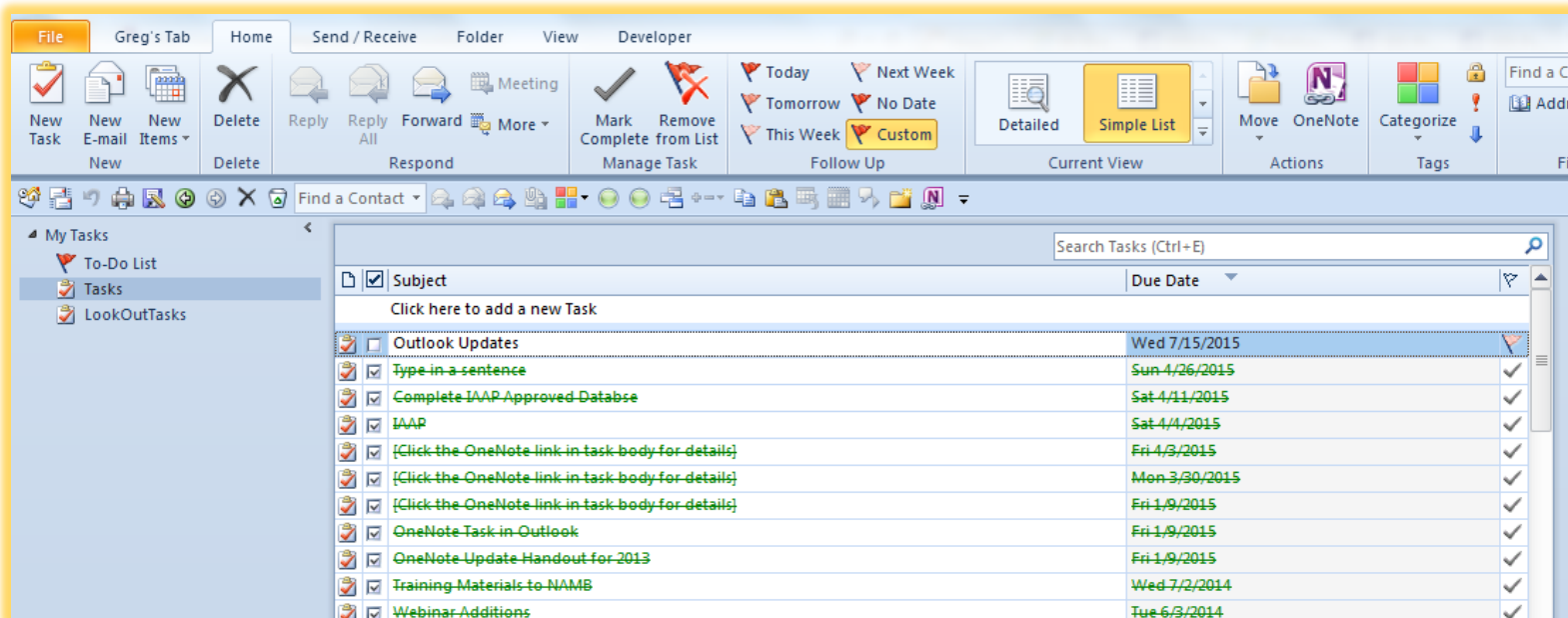


Task Window

Clicking the Task icon on your Outlook Navigation Pane's window activates your main Task Pane window in a Table format with column headers. To begin a new task, you may click your new icon and from the drop down list select New Task.

In your Navigation Pane, Click your Task Group. Your To-Do List or Task list appears; I am in the Detailed List View and my list is sorted by Due Date from Latest to Earliest.

The Ribbon and Home Tab that activate have the same functions as our other Outlook objects. Just as we have studied in E-mail, you may change these columns by right clicking a column and choosing the shortcut items you wish. I have my Outlook Updates selected.

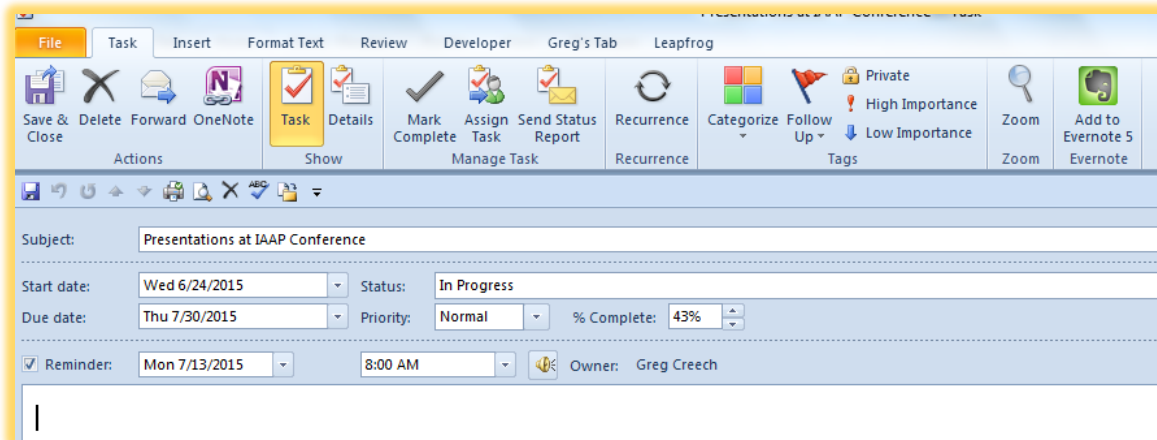


The screenshot shows the Outlook interface with the Task window open. The ribbon at the top includes tabs for File, Greg's Tab, Home, Send / Receive, Folder, View, and Developer. The Home tab is active, showing various task-related icons like New Task, New E-mail, and Delete. The Task window is displayed in a table format with columns for Subject and Due Date. The tasks are sorted by Due Date from latest to earliest.

Subject	Due Date
Outlook Updates	Wed 7/15/2015
Type in a sentence	Sun 4/26/2015
Complete IAAP Approved Database	Sat 4/11/2015
IAAP	Sat 4/4/2015
[Click the OneNote link in task body for details]	Fri 4/3/2015
[Click the OneNote link in task body for details]	Mon 3/30/2015
[Click the OneNote link in task body for details]	Fri 1/9/2015
OneNote Task in Outlook	Fri 1/9/2015
OneNote Update Handout for 2013	Fri 1/9/2015
Training Materials to NAMB	Wed 7/2/2014
Webinar Additions	Tue 6/3/2014

Creating and Editing a task

Click the New Task button in your Home Tab's Task Window.

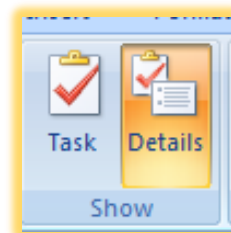


A sample task with the Task displaying is here. Like other objects, such as appointments and contacts, I am associating *Categories* with my *Task* and providing *Start Date*, *Due Date*, and *Reminders*. I add attachments and other items as I progress to my completion date.

Task Tab

Details View

The Details button on the Show Group for a task displays the completion date, Total and Actual work and can track your mileage and billing information.



With your New Task Form/Pane, Enter information for a task. **The only field you have to type in are the Subject field. Most of the fields contain convenient drop down listing boxes for you to select your entry. The date fields, the priority, status, and % Complete fields are populated for you with default values. You may want to change them to fit your needs.**

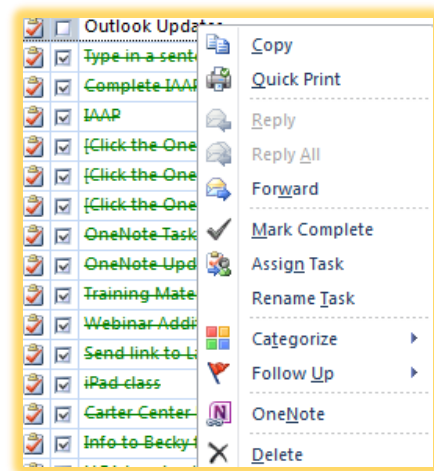
♫ Be careful with High Priorities, like email, – you don't want everything you do to be a high or Important priority, especially if you assign the task to others. ♫

As with other objects, assigning a category or categories will help you organize your tasks.

After entering information for your task, Click the Save and Close icon.

You return to your Task or To-Do list.

As you work on your task or project, you will want to update your progress. To open a task for editing and updating, you may double click the task in your *Task Window or your To-do List*. Also, you may right click your task and choose from several options. When right clicking a task the menu at right displays for you to Copy, Print, Mark Complete, or Assign task as well as other quick options for you. You may set your Follow-up and Categories for the shortcut menu, too.

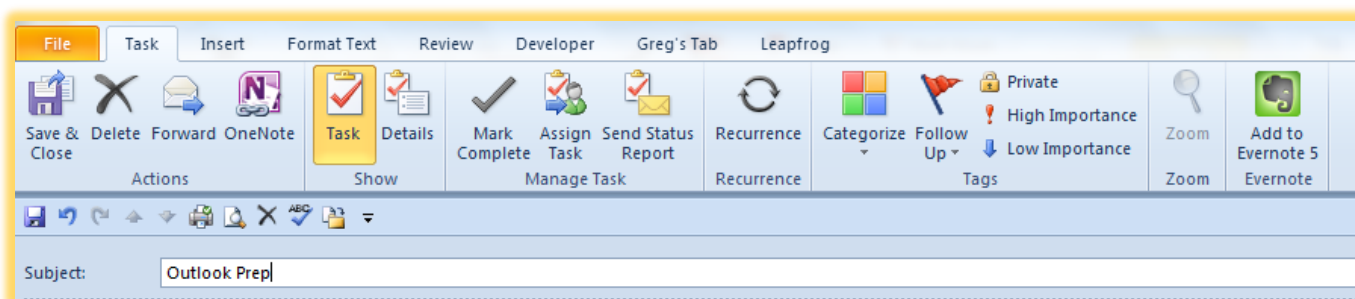


- 1. In your task window, double-click the Task icon for your task and open it.**
- 2. Change your status and % Complete.**
- 3. Click Save and Close.**

➤ Hot Tip! Outlook considers Follow-ups as To-Do Items and appear in your Tasks as To-Dos, so you are never far away from your follow-ups and To-Dos. ➤

Assigning a Task

Task assignment is very similar to *Meeting Request*. As you make or after you have made a task, you may assign the task to others. The individuals have the right to **Accept, Decline, or Tentatively accept** your task. They will receive an e-mail and may choose to accept or decline your task. Outlook will send you an email with their comments and approval or disapproval as the case may be. *✍ I don't assign tasks in this manner without first phoning or talking to the person. Receiving a task e-mail without discussing the task with the assignee like this is rude. ✍*

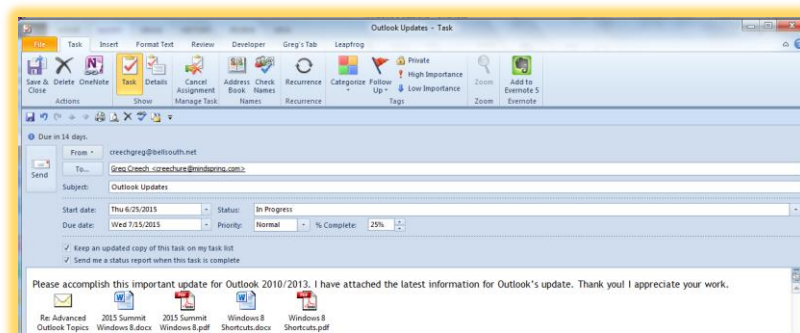


Let's assign a task and examine Outlook's process and screens for Assigning Tasks.

- 1. Create a Task or Edit an Existing Task – my sample task for Outlook displays above.**
- 2. On your Task Tab and the Manage Task Group you will see the Assign Task button.**

Notice the buttons on the Manage Task group – these buttons allow you to send a status report if you own the task and Mark the task as Complete when the you accomplish the task.

- 1. Click the Assign Task Icon. Outlook adds the To: email field to your task and Check boxes for you to Keep an updated copy of the task on your task list so as the assignee makes changes and updates to the task you will be notified. Once the task is completed you will receive as status report alerting you to the completion and**



when the task was completed. Outlook add the Cancel Assignment icon to your toolbar. Notice that you may use the Insert File button as I have accomplished above and you may make this a recurring task like we achieved in Recurring appointments in our Calendar.

After you send the e-mail you will not have control over your task. You loose control because you are no longer the owner of the task. When the recipient accepts the task they are the owner and send you updates and progress reports. If they decline your task, you become the owner again and control your task (but alas you'll have to go search for others to assign your task or just do the task yourself). Assigning tasks, like Meetings, work best in a shared server environment. Outlook and the assignee can send status reports and updates to you using the task view and form.

2. After you finish your task form and assignment, Click the Send button. Since you are no longer the owner of the task, Outlook will alert you that task will turn off your reminder. Your task icon will change on your Task Main view.

The recipient will receive an email to Accept or Decline the task.

After I accept the task, I own the task and can provide status reports and updates, until the task is complete. You may right click on the email message and Accept or Decline the task from the shortcut menu, too. Outlook will track your task and when complete will notify the owner and the assignee will lose control of the task once it is complete – ownership of the task reverts to the original owner/creator of the task and the assignment.

LookOut! The Outlook Journal

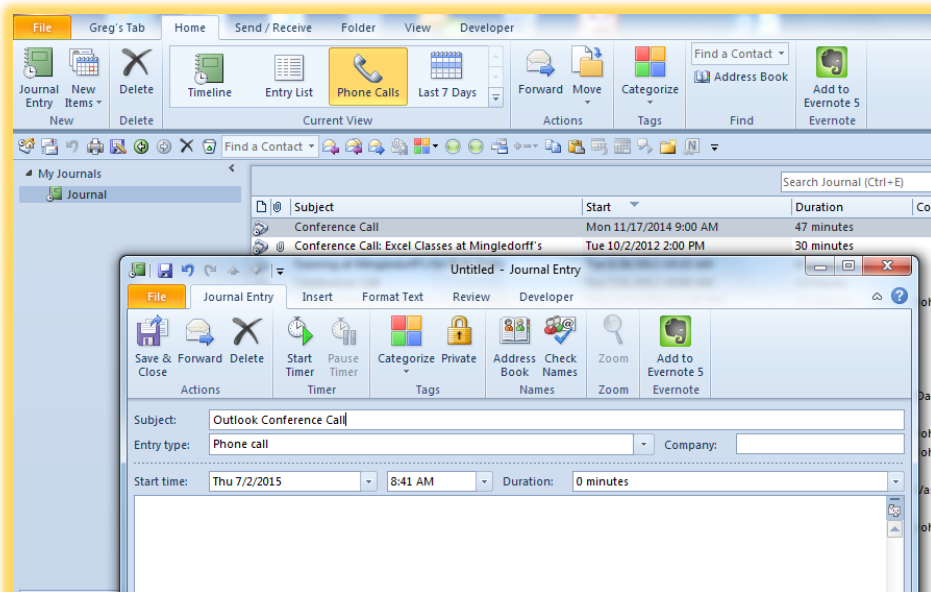
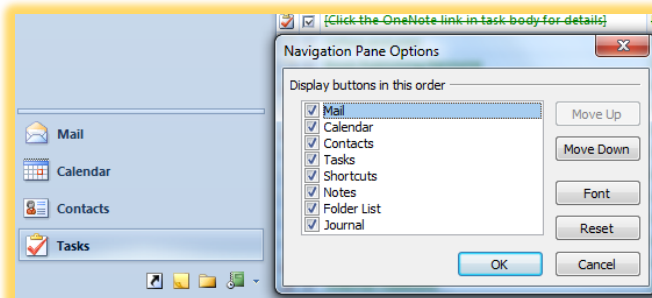
Office 2013
Feature

Outlook 2013 omits the Journal from the Navigation Pane and places the Journal in the Folders View as a Folder. Using the Folders view, you will see Journal in your list.

You can track many types of items using Outlook and the Journal provides ways of tracking information not covered in Calendar, Mail, Tasks, or Contacts.

Let's create a Phone Call Journal entry.

1. Using 2010 your Journal can be a button on your Navigation pane as displayed at right with the Navigation Pane Options. Using 2013 you will need to activate your Folders view and you will see Journal in your Folder list to open the Journal.
2. With your Journal open, Click your Journal entry.
3. Ensure the Entry type is Phone Call.
4. Click the Start Timer button on your Journal Entry Tab and the clock begins timing your call and will update the duration box for you. Also, assign categories to your call. This is helpful in retrieving your phone call.

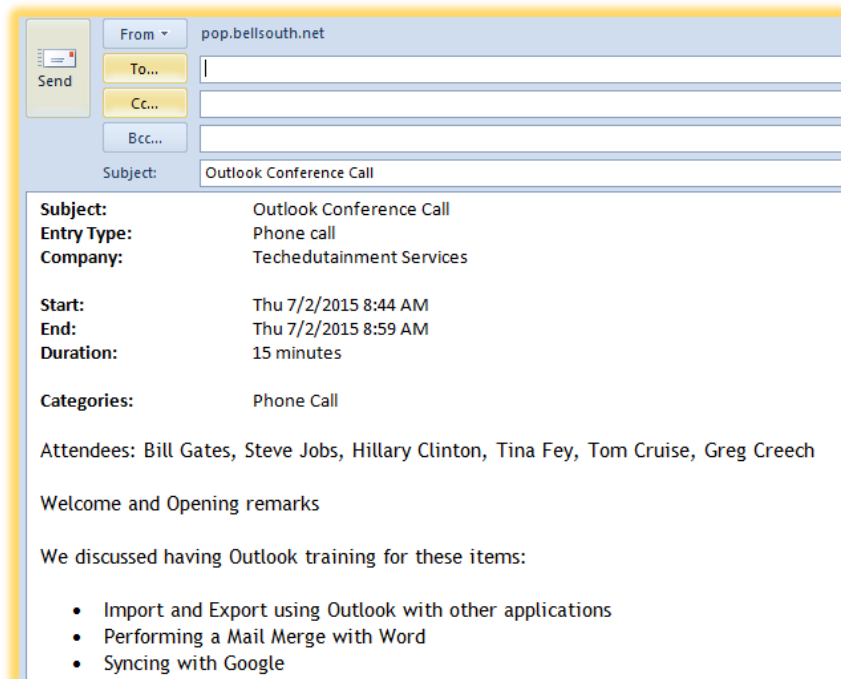
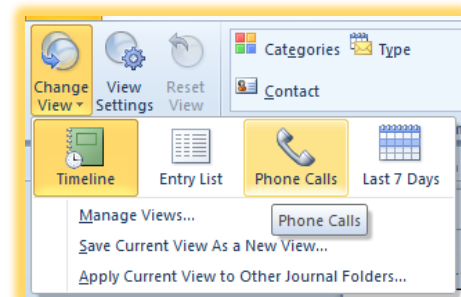


- 5. As the call progresses, you may enter notes or other items to document the phone call.**
- 6. After the call completes, click the Save and Close button. A completed screen appears below for a conference call.**

You can create many types of Entries. As we accomplished above, I have selected Phone call and Outlook has timed it for me. After you select your options and completed your Journal entry, *Click Save and Close*. You can view your journal entries using the **Journal** button on your *Navigation pane* or in *Outlook 2013 the Folders View and the Journal Folder*.

I can open the details of the Conference Call by double clicking the Client Conference Call icon and the Journal entry screen opens. Also, notice the View Tab; you can view your Journal in various ways using the Change View button and gallery.

✍ A Hot Tip! If you use the Journal to view your Conference call, you can click the Phone Call entry and drag it to your Mail button on the Navigation Pane. Outlook creates a message with ALL of the information including date, time, duration of the call and your notes in the body of your e-mail message. You simply address the e-mail message to the recipients and send the message. My email message with my conference call displays below. ✍



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