Book III

Outlook

Chapter 1: Getting Acquainted with Outlook

In This Chapter

- ✔ **Getting around in Outlook**
- ✔ **Viewing folders in different ways**
- ✔ **Categorizing items so that you can locate them easily**
- ✔ **Searching in folders**
- ✔ **Deleting items**
- ✔ **Backing up your Outlook file**
- ✔ **Importing e-mail and contact information from other software programs**
- ✔ **Archiving old-and-in-the-way items**

*T*his chapter pulls back the curtain and gives you a first glimpse of *Outlook*, the e-mailer and personal organizer in the Office 2010 suit of programs. Read on to find out once and for all what Outlook does, how to get from folder to folder, and the different ways to view the stuff in folders. You can find advice about keeping folders well organized, deleting stuff, backing up an Outlook file, and cleaning out items in folders that you no longer need.

What Is Outlook, Anyway?

Outlook isn't in character with the rest of the Office programs. It's a little different in that what you see on-screen changes when you click a Navigation pane button on the left side of the window. Click a Navigation pane button — Mail, Calendar, Contacts, Tasks, Notes, Folder List, or Shortcuts — and you go to a different Outlook window altogether.

Outlook can be confusing because the program serves many different purposes. To wit, Outlook is all this:

✦ **An e-mail program:** You can use it to send and receive e-mail messages and files, as well as organize e-mail messages in different folders so that you can keep track of them. (See Chapter 3 of this mini-book.)

Navigating the Outlook Folders

The first thing you should know about Outlook is this: All items are kept in folders, as shown in Figure 1-1. E-mail messages when they arrive are kept in the Inbox folder. Calendar items are kept in the Calendar folder. Notes are kept in the Notes folder. When you want to undertake a new task, you go to a different folder.

Navigation pane

Selected folder

To-Do bar
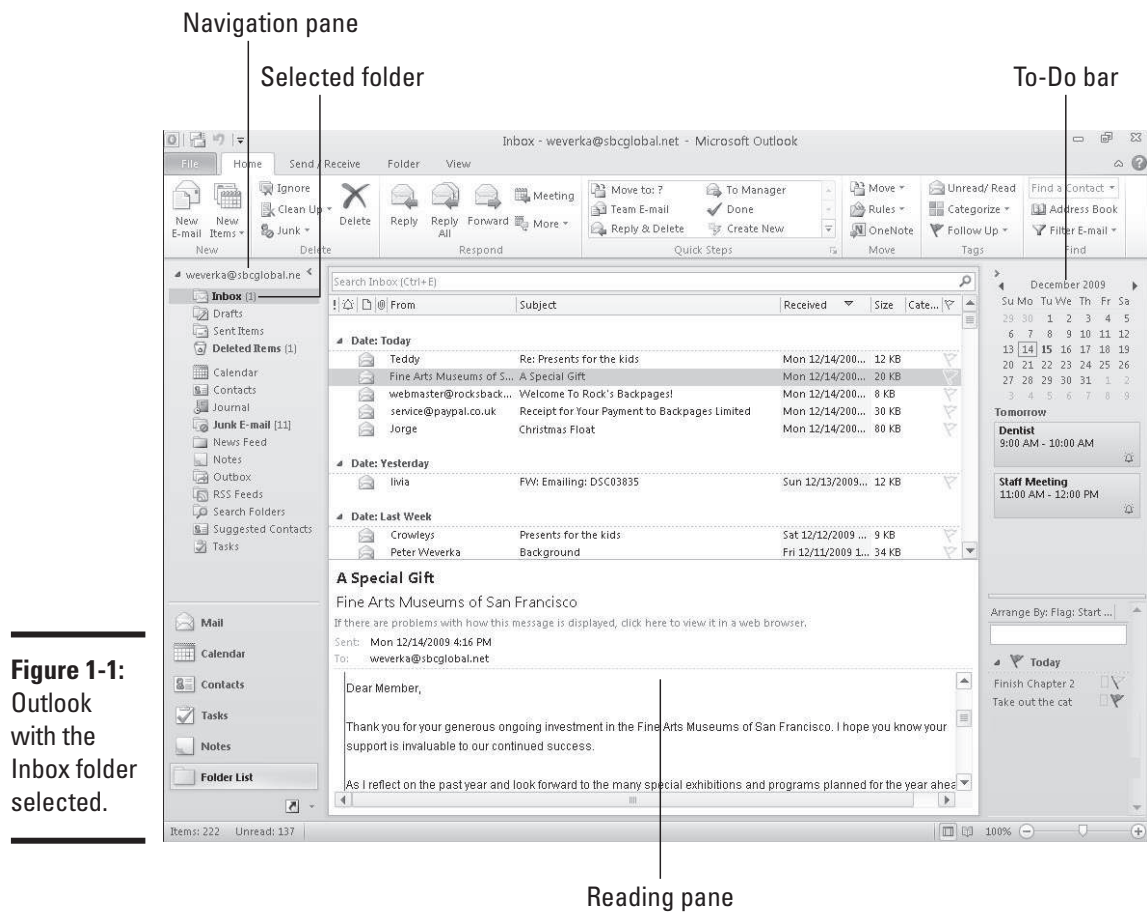
Figure 1-1: Outlook with the Inbox folder selected.

Reading pane

Here are the ways to get from folder to folder in Outlook and undertake a new task:

✦ **Navigation pane:** Click a button in the Navigation pane — Mail, Calendar, Contacts, Tasks, or Notes — to go to a folder. The Navigation pane appears on the left side of the window (refer to Figure 1-1).

✦ **Folder List:** Click the Folder List button (or press Ctrl+6) and select a folder in the Navigation pane. For example, to read incoming e-mail messages, select the Inbox folder (refer to Figure 1-1). The Folder List button is located at the bottom of the Navigation pane.

TIP You can open a folder in a new window. To do so, right-click a Navigation pane button or folder name and choose Open in New Window. To close a window you opened this way, click its Close button (the *X* in the upper-right corner).

Wrestling with the Navigation Pane and To-Do Bar

Outlook is designed for you to move from folder to folder with no trouble. All you have to do to open a new folder is click a button or folder icon in the Navigation pane. However, sometimes the Navigation pane gets in the way. You need the extra space for reading e-mail messages or rummaging in the Contacts folder. Here are instructions for wrestling with the Navigation pane, To-Do Bar, and Reading pane:

✦ **Hiding and displaying the Navigation pane:** As I explain earlier, the Navigation pane appears on the left side of the window and offers buttons and folder names that you can click to go to different folders (refer to Figure 1-1). Click the Expand or Maximize buttons in the Navigation pane (or press Alt+F1) to display or hide it. You can also go to the View tab, click the Navigation Pane button, and choose an option on the drop-down list.

✦ **Hiding and displaying the To-Do Bar:** The *To-Do Bar* appears on the right side of the screen and shows your calendar, upcoming appointments, and tasks arranged by due date (refer to Figure 1-1). Click a calendar day to open the Calendar on that day. Double-click an appointment to open an Appointment window, or a task to open a Task window. To display or hide the To-Do Bar, click its Expand or Minimize button (or press Alt+F2). You can also go the View tab, click the To-Do Bar button, and choose an option on the drop-down list.

✦ **Hiding and displaying Reading pane:** The *Reading pane* appears on the right side or bottom of the window and gives you a more detailed look at an item you selected. It comes in handy when you're reading e-mail because you can read a message and still view your message list (refer to Figure 1-1). To display or hide the Reading pane, go to the View tab, click the Reading Pane button, and choose Right, Bottom, or Off from the drop-down list. When the Reading pane is displayed, you can also hide it by dragging its border to the bottom or right side of the window.

Getting a Better View of Items in a Folder

Because you spend so much time gazing at folders, it pays to know the different ways to view items in folders. Each folder offers different ways of viewing its contents. Go to the Home tab and View tab to discover different techniques for viewing items. Figure 1-2 shows the Contacts folder in Business Cards view. You can see contacts in business card form by going to the Home tab and choosing Business Cards in the Current View gallery. I explain different ways of looking at items in folders throughout this mini-book.

Figure 1-2:
The
Contacts
folder in
Business
Cards view.
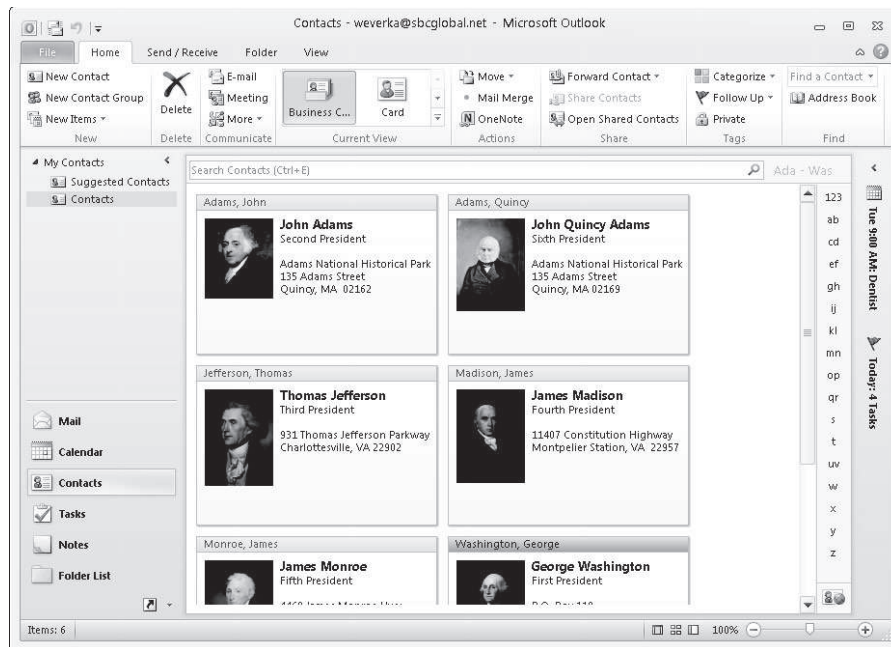
Categorizing Items

One of your biggest tasks in Outlook, if you choose to accept it, is to categorize items in folders so that you can find and deal with them. Finding items can be a chore in a folder with a lot of items, but by categorizing items, you can find the ones you're looking for. Categories are color-coded to make identifying them easier. After you assign a category to an item, you can arrange items in folders by category, and in so doing, find items. Categorizing is a great way to stay on top of all the chores you have to do.

Creating a category

Follow these steps to create a category for organizing folder items:

1. **Select an item in a folder to which you want to assign your new category.**

2. **On the Home tab, click the Categorize button and choose All Categories on the drop-down list.**

You see the Color Categories dialog box, as shown in Figure 1-3. At this point, you can create a category from scratch or revamp one of Outlook's color-named categories:

• *Creating your own category:* Click the New button to open the Add New Category dialog box, as shown in Figure 1-3. Then enter a name for your category and choose a color from the drop-down list. While you're at it, you can open the Shortcut Key drop-down list

Choose the category on the drop-down list that you want to assign by "quick-clicking" in the Category column.

Arranging items by category in folders

To arrange items by category in a folder, select the folder in the Navigation pane and use one of these techniques:

✦ On the View tab, choose Categories in the Arrange By gallery.

✦ In a list, click the Categories column heading to sort items by category.

You can also click the Categorized button on the (Search Tools) Search tab to organize the results of a search by category.

Searching for Stray Folder Items

If you can't locate an item in a folder by scrolling, changing views, or any other means, run a search. To start your search, go to the folder you want to search and click in the Search box (or press Ctrl+E). You can find the Search box below the Ribbon. As soon as you click in the Search box, Outlook opens the (Search Tools) Search tab so that you can describe what you're seeking, as shown in Figure 1-4.

Search box

Figure 1-4: Describe what you're searching for on the (Search Tools) Search tab.

Search results (with keywords highlighted)
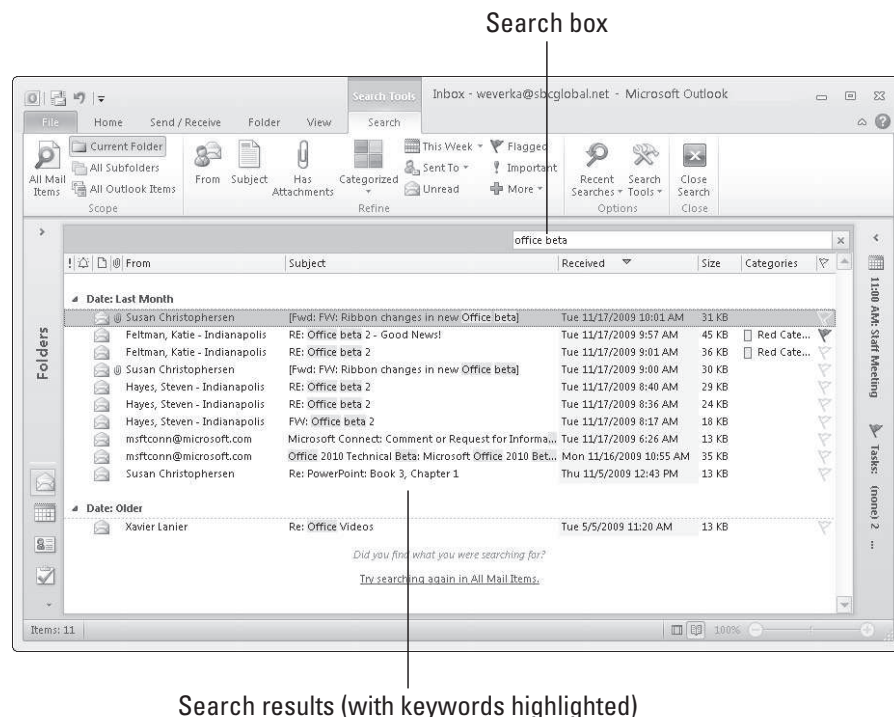
Choosing Refine options

To narrow a search, click buttons in the Refine group on the (Search Tools) Search tab. After you click a button, Outlook provides a place in the Search box for you to enter a keyword. Which buttons appear in the Refine group depends on which folder you search.

In a folder that contains e-mail, for example, you can click the From button and enter a sender name in the Search box to search for e-mails you received from a particular person. You can click the Subject button and enter a keyword to search the subject descriptions in e-mail you received.

Conducting an advanced search

If, woe is me, you can't find what you're looking for with an instant search or a refined search, you can try your luck with an advanced search. On the (Search Tools) Search tab, click the Search Tools button and choose Advanced Find on the drop-down list. You see the Advanced Find dialog box. In the Look For drop-down list, choose what you want to search for. Click the Browse button to open the Select Folder(s) dialog box, where you can select more than one folder to search in. Then choose options in the three tabs to formulate your search. Which options are available depends on which folder you're searching.

Deleting E-Mail Messages, Contacts, Tasks, and Other Items

Outlook folders are notorious for filling quickly. E-mail messages, contacts, and tasks soon clog the folders if you spend any time in Outlook. From time to time, go through the e-mail folders, Contacts window, Task window, and Calendar to delete items you no longer need. To delete items, select them and do one of the following:

✦ Click the Delete button.

✦ Press the Delete key.

✦ Right-click and choose Delete.

Deleted items — e-mail messages, calendar appointments, contacts, and tasks — land in the Deleted Items folder in case you want to recover them. To delete items once and for all, open the Deleted Items folder and start deleting like a madman.

To empty the Delete Items folder altogether, right-click the folder and choose Empty Folder. You can also visit the File tab, choose Info, click the

Cleanup Tools button, and choose Empty Deleted Items Folder on the drop-down list.

Be sure to check out "Running the Mailbox Cleanup command" at the end of this chapter. It explains a quick way to delete unwanted Inbox messages.

Finding and Backing Up Your Outlook File

All the data you keep in Outlook — e-mail messages, names and addresses, calendar appointments and meetings — is kept in a `.pst` file on your computer. Locating this file on your computer sometimes requires the services of Sherlock Holmes. The file isn't kept in a standard location. It can be any number of places, depending on the operating system on your computer and whether you upgraded from an earlier version of Office.

The all-important `.pst` file is hiding deep in your computer, but you need to find it. You need to know where this file is located so that you can back it up to a CD, flash drive, or other backup medium. It holds clients' names and the names of relatives and loved ones. It holds the e-mail messages you think are worth keeping. It would be a shame to lose this stuff if your computer failed.

Here's a quick way to find the `.pst` file on your computer and back it up:

File

1. **On the File tab, choose Info.**

The Account Information window opens.

2. **Click the Account Settings button and choose Account Settings on the drop-down list.**

You see the Account Settings dialog box.

3. **Go to the Data Files tab.**

This tab is shown in Figure 1-5. It lists the location of your `.pst` file (or files).

4. **Select your `.pst` file and click the Open File Location button.**

Windows Explorer opens, and you see the folder where your `.pst` file is kept.

5. **Close Outlook.**

Sorry, but you can't back up a `.pst` file if Outlook is running.

6. **To back up the file, right-click it in Windows Explorer, choose Send To on the shortcut menu, and choose the option on the submenu that represents where you back up files.**

If an accident befalls your computer, copy the backup `.pst` file that you made into the folder where the `.pst` file is stored on your computer.

Importing E-Mail and Addresses from Another Program

Suppose that you've been using Outlook Express, Lotus Organizer, or another e-mail program to handle your e-mail and contact addresses, but now you've become a convert to Outlook. What do you do with the e-mail messages and names and addresses in the other program? You can't let them just sit there or you can import them into Office and pick up where you left off.

File

To import e-mail and contact addresses from another program, go to the File tab, choose Open, and click the Import button. You see the Import and Export Wizard. What you do next depends on where you now do your e-mailing and address tracking:

✦ **Outlook Express:** Select Import Internet Mail and Addresses and click Next. In the Outlook Import Tool dialog box, select Outlook Express, select check boxes to decide what to import (Mail, Addresses, and/or Rules), and click the Finish button.

✦ **Eudora:** Select Import Internet Mail and Addresses and click Next. In the Outlook Import Tool dialog box, select Eudora, choose options to decide what to do about duplicate entries, and click the Finish button. In the Browser for Folder dialog box, select the file where the Eudora data is kept and click OK.

✦ **Lotus Organizer:** Select Import from Another Program or File, click Next, select a Lotus Organizer, and click Next again. Click Next while you go along. You're asked how to handle duplicate items, to locate the Lotus Organizer data file, and to select an Outlook folder to put the data in.

TIP

Before you import e-mail and addresses from another program, weed out the e-mail messages and addresses you no longer need. Why ferry this stuff into Outlook when you no longer need it?

Cleaning Out Your Folders

Getting rid of unneeded items in folders is essential for good mental health. All that clutter can be distressing. Earlier in this chapter, "Deleting E-Mail Messages, Contacts, Tasks, and Other Items" explains how to muck out folders by emptying them. These pages explain two more techniques for removing detritus from folders — archiving and the Mailbox Cleanup command.

Archiving the old stuff

In some cases, Outlook puts e-mail messages, tasks, and appointments older than six months in the *Archive folder,* a special folder for items that Outlook

Chapter 2: Maintaining the Contacts Folder

In This Chapter

✔ **Recording information about a new contact**

✔ **Creating a contact group**

✔ **Locating a contact in the Contacts folder**

✔ **Printing contact information in the Contacts folder**

In *pathology* (the study of diseases and how they're transmitted) a *contact* is a person who passes on a communicable disease, but in Outlook, a *contact* is someone about whom you keep information. Information about contacts is kept in the Contacts folder. This folder is a super-powered address book. It has places for storing people's names, addresses, phone numbers, e-mail addresses, Web pages, pager numbers, birthdays, anniversaries, nicknames, and other stuff besides. When you enter an e-mail address, you can get it straight from the Contacts folder to be sure that the address is entered correctly. As I explain in Book II, Chapter 5, you can also get addresses from the Contacts folder when you generate form letters, labels, and envelopes for mass mailings in Word.

This short but happy chapter explains how to maintain a tried-and-true Contacts folder, enter information about people in the folder, create contact groups to make sending the same message to many people easier, find a missing contact, and print the information in the Contacts folder.

Maintaining a Happy and Healthy Contacts Folder

A Contacts folder is only as good and as thorough as the information about contacts that you put into it. These pages explain how to enter information about a contact and update the information if it happens to change.

Don't despair if you have been using another software program to track addresses. Chapter 1 of this mini-book explains how to import those addresses into Outlook without having to reenter them.

Contact Groups for Sending Messages to Groups

The captain of the volleyball team and the secretary of the PTA are examples of people who have to send e-mail messages to the same group of people on a regular basis. You might be in the same boat. You might have to send e-mail messages to the same 10 or 12 people from time to time. Entering e-mail addresses for that many people each time you want to send e-mail is a drag. To keep from having to enter so many e-mail addresses, you can create a *contact group*, a list with multiple e-mail addresses. To address your e-mail message, you simply enter the name of the contact group, not the individual names, as shown in Figure 2-3.
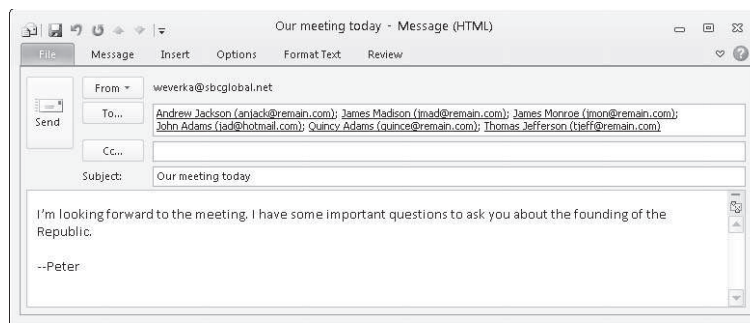
Figure 2-3: Instead of entering many addresses (top), enter a contact group name (bottom).
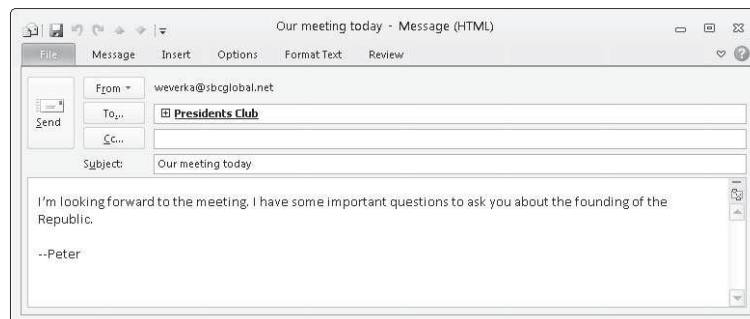
Creating a contact group

Follow these steps to bundle e-mail addresses into a contact group:

1. **On the Home tab, click the New Contact Group button (or press Ctrl+Shift+L).**

   You see the Contact Group window, as shown in Figure 2-4.

2. **Enter a descriptive name in the Name text box.**

Finding a Contact in the Contacts Folder

The Contacts folder can grow very large, so Outlook offers a number of ways to locate contacts. After you find the contact you're looking for, double-click the contact's name to open the Contact form window. Here are some techniques for locating a contact in the Contacts folder:

✦ **Use the scrollbar:** Click the arrows or drag the scroll box to move through the list.

✦ **Click a letter button:** Click a letter button on the right side of the window to move in the list to names beginning with a specific letter.

✦ **Change views:** On the Home tab, go to the Current View gallery and choose a view option: Business Card, Card, Phone, or List. Changing views often helps in a search.

✦ **Type a name in the Find a Contact text box:** On the Home tab, enter a name or e-mail address in this text box and press Enter.

✦ **Search Contacts text box:** Enter a keyword in the Search Contacts text box (see Chapter 1 of this mini-book for instructions about searching for items in folders).

✦ **Search by category:** Categorize contacts as you enter them and switch to By Category view to arrange contacts by category (see Chapter 1 of this mini-book for information about categories).

Printing the Contacts Folder

The paperless office hasn't arrived yet in spite of numerous predictions to the contrary, and sometimes it's necessary to print the Contacts folder on old-fashioned paper. For times like these, I hereby explain the different ways to print the Contacts folder and how to fiddle with the look of the printed pages.

TIP

To print information about a single contact, double-click his or her name to open the Contact window. Then press Ctrl+P, and in the Print window, click the Print button.

Different ways to print contact information

Follow these steps to print information about contacts in the Contacts folder:

1. **On the Home tab, open the Current View gallery and choose a view.**

Which printing options you get when you print information from the Contacts folder depends on which view of the Contacts folder is showing when you give the command to print:

Chapter 3: Handling Your E-Mail

In This Chapter

↙ **Addressing, sending, replying to, and forwarding e-mail messages**

↙ **Sending files and pictures with e-mail**

↙ **Understanding the HTML, plain text, and rich text format**

↙ **Receiving e-mail and files over the Internet**

↙ **Organizing and managing your e-mail**

↙ **Creating and using different folders to store e-mail**

↙ **Preventing junk e-mail**

"*N*either snow nor rain nor heat nor gloom of night stays these couriers from the swift completion of their appointed rounds," reads the inscription on the Eighth Avenue New York Post Office Building. E-mailers face a different set of difficulties. Instead of snow, rain, or gloomy nights, they face the task of having to manage volumes of e-mail.

This chapter explains the basics of sending and receiving e-mail, but it also goes a step further to help you organize and manage your e-mail messages. It shows you how to send files and pictures with e-mail messages, and postpone sending a message. You can also find out how to be advised when someone has read your e-mail, reorganize e-mail in the Inbox window, and be alerted to incoming messages from certain people or from people writing about certain subjects. This chapter shows you how to create folders for storing e-mail and explains how to prevent junk e-mail from arriving on your digital doorstep.

Addressing and Sending E-Mail Messages

Sorry, you can't send chocolates or locks of hair by e-mail, but you can send digital pictures and computer files. These pages explain how to do it. You also discover how to send copies and blind copies of e-mail messages, reply to and forward e-mail, send e-mail from different accounts, and postpone sending a message. Better keep reading.

Figure 3-4:
Putting off
sending
an e-mail
message.
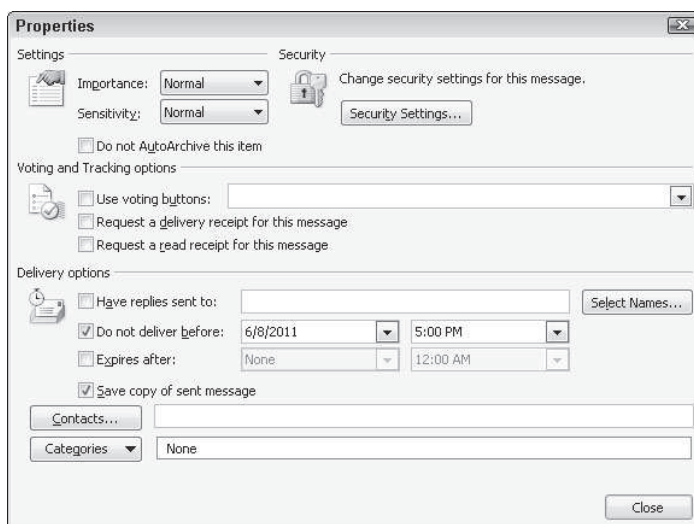
Being Advised When Someone Has Read Your E-Mail

Outlook offers a command whereby you can be informed when someone has received or read an e-mail message you sent. You can even send a mini-ballot to someone else, solicit their vote, and have the vote sent to you by e-mail. To perform this magic trick, start in the Message window and go to the Options tab. In the Tracking group, select one or more of these options:

✦ **Use Voting Buttons:** Voting buttons are included on a drop-down list in the e-mail message you send. Choose a set of buttons from the drop-down list, as shown in Figure 3-5. The recipient clicks the Vote button, chooses an option on a drop-down list, and the response is sent to you in the form of an e-mail message with the word Approve, Reject, Yes, No, or Maybe in the subject line.

✦ **Request a Delivery Receipt**: You're informed by e-mail after the message is delivered. Select the Request a Delivery Receipt check box. To be informed, however, you and the recipient must use the same Exchange Server, and the recipient must choose to inform you that the message was delivered. Don't count on this one really working.

✦ **Request a Read Receipt:** The message box appears, as shown in Figure 3-5. If the recipient clicks the Yes button, a Message window appears immediately so that he or she can send an e-mail informing you that the message was read. The message, when it arrives on your end, lists the date and time that the response message was sent. Select the Request a Read Receipt check box.

The Receipt Read message box

Voting buttons

Figure 3-5:
Making sure
that you get
a response.
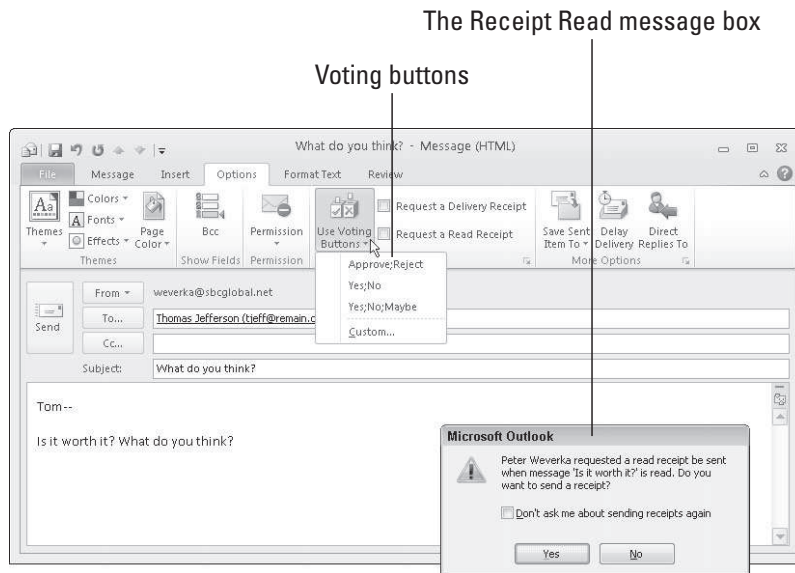
All about Message Formats

Outlook offers three formats for sending e-mail messages: HTML, plain text, and rich text. What are the pros and cons of the different formats? How do I choose a format for my e-mail messages? I'm so glad you asked.

The three message formats

Outlook offers these three formats for sending e-mail messages:

✦ **HTML format:** These days, almost all e-mail is transmitted in HTML (HyperText Markup Language) format, the same format with which Web pages are made. If HTML is the default format you use for creating messages in Outlook — and it is unless you tinkered with the default settings — the e-mail messages you send are, in effect, little Web pages. HTML gives you the most opportunities for formatting text and graphics. In HTML format, you can place pictures in the body of an e-mail message, use a background theme, and do any number of sophisticated formatting tricks.

✦ **Plain text format:** In plain text format, only letters and numbers are transmitted. The format doesn't permit you to format text or align paragraphs in any way, but you can rest assured that the person who receives the message can read it exactly as you wrote it.

✦ **Rich text format:** The third e-mail message format, rich text, is proprietary to Microsoft e-mailing software. Only people who use Outlook and Outlook Express can read messages in rich text format, and I don't recommend it for that reason.

When someone sends you an e-mail message, you can tell which format it was transmitted in by looking at the title bar, where *HTML, Plain Text,* or *Rich Text* appears in parentheses after the subject of the message. Outlook is smart enough to transmit messages in HTML, plain text, or rich text format when you reply to a message that was sent to you in that format.

Choosing a format for your e-mail messages

Follow these instructions if you need to change the format in which your e-mail messages are transmitted:

✦ **Changing the default format:** On the File tab, choose Options. In the Options dialog box, go to the Mail category. From the Compose Messages in This Format drop-down list, choose HTML, Rich Text, or Plain Text.

✦ **Changing the format for a single e-mail message:** In the Message window, go to the Format Text tab and click the HTML, Plain Text, or Rich Text button.

Receiving E-Mail Messages

Let's hope that all the e-mail messages you receive carry good news. These pages explain how to collect your e-mail and all the different ways that Outlook notifies you when e-mail has arrived. You can find several tried-and-true techniques for reading e-mail messages in the Inbox window. Outlook offers a bunch of different ways to rearrange the window as well as the messages inside it.

Getting your e-mail

Starting in the Inbox folder on the Send/Receive tab, here are all the different ways to collect e-mail messages that were sent to you:

✦ **Collect all e-mail:** Click the Send/Receive All Folders button (or press F9). Mail is sent from and delivered to all your e-mail accounts.

✦ **Collect mail for the Inbox folder only:** Click the Update Folder button (or press Shift+F9).

✦ **Send all unsent mail:** Click the Send All button.

✦ **Collect e-mail from a single account (if you have more than one):** Click the Send/Receive Groups button, and on the drop-down list, choose the name of a group or an e-mail account. (See the sidebar, "Groups for handling e-mail from different accounts," later in this chapter to find out what groups are.)

✦ **Collect e-mail automatically every few minutes:** Click the Send/Receive Groups button and choose Define Send/Receive Groups on the

Groups for handling e-mail from different accounts

Groups are meant to help people who have more than one e-mail account handle their e-mail. To begin with, all e-mail accounts belong to a group called All Accounts. Unless you change the default settings, all your e-mail accounts belong to the All Accounts group, and e-mail is sent by and received from all your e-mail accounts at the same time.

If you want to change these default settings, go to the Send/Receive tab, click the Send/Receive Groups button, and choose Define Send/Receive Groups on the drop-down list. You see the Send/Receive Groups dialog box (refer to Figure 3-6). Follow these instructions in the dialog box to change how you handle e-mail from different accounts:

✔ **Excluding an account from the All Accounts group**: Exclude an account if you don't want to collect its e-mail on a regular basis. Maybe you want to collect mail from this account sporadically. To exclude an account, select the All Accounts group and click the Edit button. You land in the Send/Receive Settings – All Accounts dialog box. In the Accounts list, select the account you want to exclude and deselect the Include the Selected Account in this Group check box.

✔ **Creating a new group:** Create a new group if you want to establish settings for a single e-mail account or group of accounts. Click the New button in the Send/Receive Groups dialog box, enter a name in the Send/Receive Group Name dialog box, and click OK. You see the Send/Receive Settings dialog box. For each account you want to include in your new group, select an account name and then select the Include the Select Account in This Group check box.

✔ **Choosing settings for a group:** In the Send/Receive Groups dialog box, select the group whose settings you want to establish. At the bottom of the dialog box (see Figure 3-6), select whether to send and receive e-mail when you press F9, whether to send and receive automatically every few minutes, and whether to send and receive when you exit Outlook.
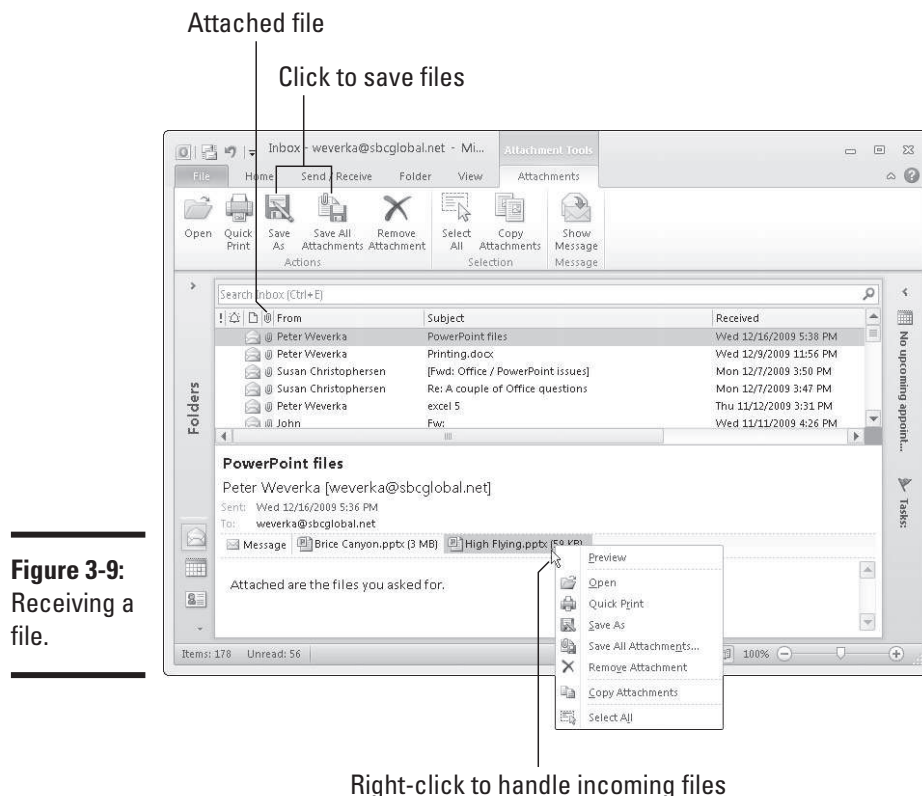
Reading Your E-Mail in the Inbox Window

Messages arrive in the Inbox window, as shown in Figure 3-7. In the window, unread messages are shown in boldface type and have envelope icons next to their names; messages that you've read (or at least opened to view) are shown in Roman type and appear beside open envelope icons. In the Folder List, a number in parentheses beside the Inbox folder and Deleted Items folder tells you how many unread messages are in those folders. (The number in square brackets beside the Drafts and Junk E-Mail folders tells you how many items, read and unread, are in those folders).

To read a message, select it and look in the Reading pane, or to focus more closely on a message, double-click it to open it in a Message window, as shown in Figure 3-7.

in the Inbox window appear as if it has never been opened, right-click it and choose Mark As Unread.

Handling Files That Were Sent to You

You can tell when someone sends you files along with an e-mail message because the paper clip icon appears in the Attachment column of the Inbox window (if column headings are displayed), as shown in Figure 3-9. The name of the file that was sent to you appears in the Reading pane (if the Reading pane is open) and in the Message window as well if you open the message in a window.

Attached file

Click to save files

Figure 3-9: Receiving a file.

Right-click to handle incoming files

Files that are sent to you land deep inside your computer in a subfolder of the Temporary Internet Files folder where you will never find them. The best way to handle an incoming file is to save it right away to a folder where you can find it when you need it.

Saving a file you received

To save a file that was sent to you and stash it in a folder of your choice, do one of the following:

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✦ Click to select the filename, and on the (Attachment Tools) Attachments tab, click the Save As button and save the file using the Save Attachment dialog box. Click the Save All Attachments button to save more than one file.

✦ Right-click the filename, choose Save As on the shortcut menu, and save the file in the Save Attachment dialog box. Right-click and choose Save All Attachments to save more than one file.

Opening a file you received

Use any of the following ways to open a file that was sent to you:

✦ Double-click the filename.

✦ Click to select the filename, and on the (Attachment Tools) Attachments tab, click the Open button.

✦ Right-click the filename and choose Open on the shortcut menu.

If the file you receive is a Word, PowerPoint, Excel, or Publisher file, you can preview it inside the Message window or Reading pane. To do so, right-click the filename and choose Preview on the shortcut menu.

Techniques for Organizing E-Mail Messages

If you're one of those unfortunate souls who receives 20, 30, 40 or more e-mail messages daily, you owe it to yourself and your sanity to figure out a way to organize e-mail messages such that you keep the ones you want, you can find e-mail messages easily, and you can quickly eradicate the e-mail messages that don't matter to you. Outlook offers numerous ways to manage and organize e-mail messages. Pick and choose the techniques that work for you.

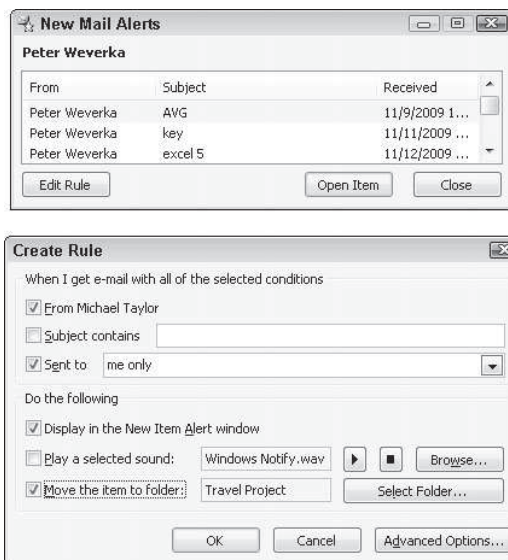In a nutshell, here are all the techniques for organizing e-mail messages:

✦ **Change views in the Inbox window:** On the View tab, click the Change View button and choose a view. Earlier in this chapter, "Reading Your E-Mail in the Inbox Window" explains all the ways to change views.

✦ **Delete the messages that you don't need:** Before they clutter the Inbox, delete messages that you're sure you don't need as soon as you get them. To delete a message, select it and click the Delete button on the Home tab, press the Delete key, or right-click and choose Delete.

✦ **Move messages to different folders:** Create a folder for each project you're involved with, and when an e-mail message about a project arrives, move it to a folder. See "All about E-Mail Folders," later in this chapter.

✦ **Move messages automatically to different folders as they arrive:** Instead of moving messages yourself after they arrive, you can tell

Complex rules with the Rules Wizard

Use the Rules Wizard to create complex rules that earmark messages with words in the message body or earmark messages sent to contact groups. You can also create a rule to flag messages automatically or delete a conversation (the original message and all its replies).
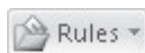
To run the Rules Wizard, go to the Home tab, click the Rules button, and choose Manage Rules & Alerts. You see the Rules and Alerts dialog box. On the E-Mail Rules tab, click the New Rule button and keep clicking Next in the Rules Wizard dialog boxes as you complete the two steps to create a rule:

✦ **Step 1:** Choose the rule you want to create or how you want to be alerted in the New Mail Alerts window (refer to Figure 3-11).

✦ **Step 2:** Click a hyperlink to open a dialog box and describe the rule. For example, click the Specific Words link to open the Search Text dialog box and enter the words that earmark a message. Click the Specified link to open the Rules and Alerts dialog box and choose a folder to move the messages to. You must click each link in the Step 2 box to describe the rule.

To edit a rule, double-click it in the Rules and Alerts dialog box and complete Steps 1 and 2 all over again.

All about E-Mail Folders

Where Outlook e-mail is concerned, everything has its place and everything has its folder. E-mail messages land in the Inbox folder when they arrive.

To delete a folder you created, open it, go to the Folder tab, and click the Delete Folder button. Items in the folder are deleted along with the folder itself. To rename a folder, open it, go to the Folder tab, click the Rename Folder button, and enter a new name.

Figure 3-12: Creating a new folder.

Yes, You Can Prevent Junk Mail (Sort Of)

Outlook maintains a folder called Junk E-Mail especially for storing junk e-mail, or *spam* as the digital variety is sometimes called. E-mail messages with certain words or phrases in the Subject line — *for free!*, *money-back guarantee*, *order now* — are routed automatically to the Junk E-Mail folder, where they needn't bother you. What's more, you can add senders' names to the Blocked Senders list and route mail from those senders straight into the Junk E-Mail folder.

WARNING!

As nice as it is, the Junk E-Mail folder has one fatal flaw — sometimes a legitimate e-mail message finds its way into the folder. From time to time, you have to look in the Junk E-Mail folder to see whether something of value is in there — and that sort of defeats the purpose of routing messages automatically to the Junk E-Mail folder. You still have to look through all that junk e-mail!

Realistically, the only way to prevent getting junk e-mail is to safeguard your e-mail address. These pages explain how to help stamp out junk mail in your lifetime by using features inside Outlook and taking preventive measures.

Defining what constitutes junk e-mail

Outlook maintains a *Safe Senders* and *Blocked Senders list* to help distinguish e-mail from junk e-mail. To help Outlook recognize junk e-mail and route it to the Junk E-Mail folder, you can take these measures to add addresses to the lists:

Chapter 4: Managing Your Time and Schedule

In This Chapter

✔ **Understanding how the Calendar works**

✔ **Going to different dates in the Calendar**

✔ **Scheduling appointments and events**

✔ **Rescheduling an activity**

✔ **Getting different views of your schedule**

The purpose of the Outlook Calendar is to keep you from arriving a day late and a dollar short. Use the Calendar to schedule meetings and appointments. Use it to make the most of your time. This chapter explains how to go from day to day, week to week, and month to month in the Calendar window. It shows you how to schedule and reschedule appointments and meetings and look at your schedule in different ways.

Introducing the Calendar

Use the Calendar to juggle appointments and meetings, remind yourself where you're supposed to be, and get there on time. Surveying your schedule in the Calendar window is easy. Merely by clicking a button, you can tell where you're supposed to be today, any given day, this week, this work week, this month, or any month.

Figure 4-1 shows, for example, someone's schedule during the work week of December 14–18 (a work week comprises Monday through Friday, not Monday through Sunday). All you have to do to find out how busy you are on a particular day, week, or month is gaze at the Calendar window. Whether someone invites you to a meeting or wants to schedule an appointment, you can open the Calendar and see right away if your schedule permits you to attend the meeting or make the appointment.

Click to change views   Date Navigator
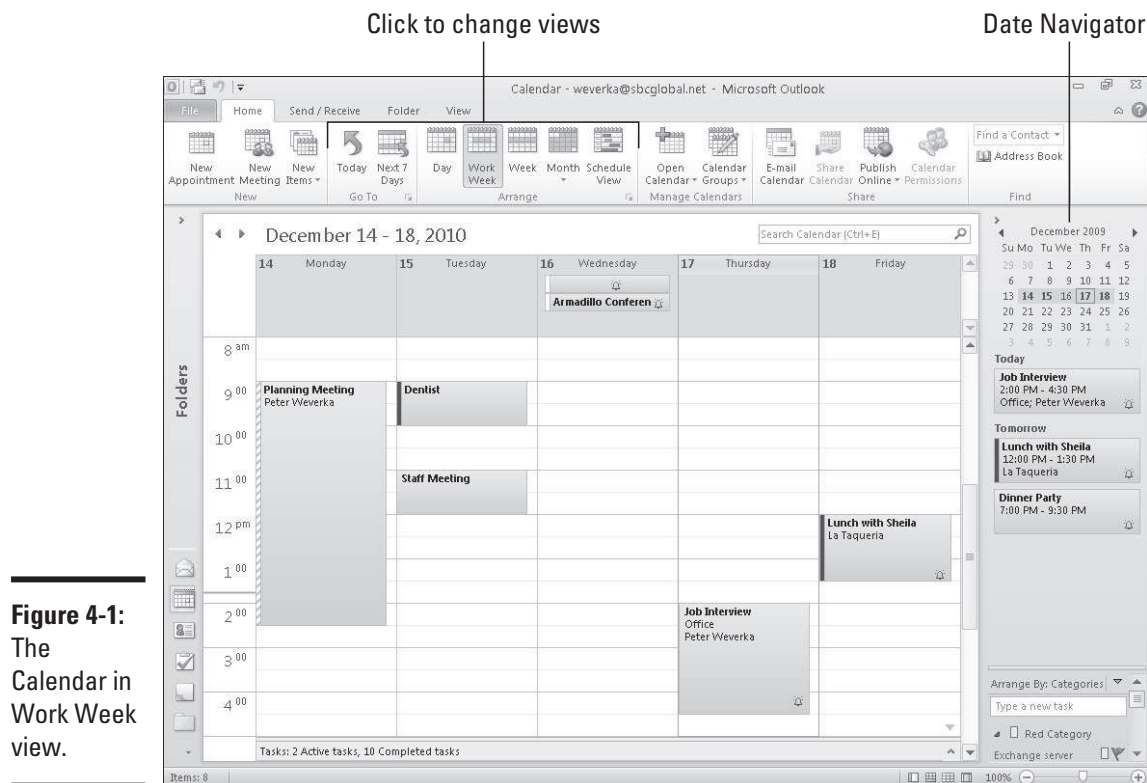
Outlook gives you opportunities to categorize meetings and appointments so that you can tell at a glance what they're all about. Moving a meeting or appointment is simply a matter of dragging it elsewhere in the Calendar window. By double-clicking a meeting or appointment in the Calendar window, you can open a window to find out where the meeting takes place or read notes you jotted down about the meeting. You can even make a bell ring and the Reminder message box appear when a meeting or appointment is forthcoming.

TIP

To make the Task List, an abbreviated Tasks window, appear below the Calendar window, go to the View tab, click the To-Do Bar button, and choose Task List on the drop-down list. Chapter 5 of this mini-book explains how to schedule tasks in the Tasks window.

The Different Kinds of Activities

REMEMBER

For scheduling purposes, Outlook makes a distinction between appointments, events, and meetings. Meetings, however, aren't everybody's concern. If your computer is connected to a network and the network uses the Microsoft Exchange Server, you can use Outlook to invite colleagues on the network to come to meetings. But if your computer isn't on a network, don't bother with meetings. Schedule appointments and events instead. You can schedule the following activities:

✦ **Appointment:** An activity that occupies a certain time period on a certain day. For example, a meeting that takes place between 11 a.m. and 12 p.m. is an appointment.

✦ **Recurring appointment:** An appointment that takes place daily, weekly, or monthly on the same day and same time each day, week, or month. A weekly staff meeting is a recurring appointment. The beauty of recurring appointments is that Outlook enters them weeks and months in advance in the Calendar window. You don't have to reenter these appointments over and over.

✦ **Event:** An activity that lasts all day. A trade show, for example, is an event. A birthday is an event. A day spent on vacation is also an event (is it ever!). On the Calendar, events and recurring events appear first.

✦ **Recurring event:** An all-day activity that takes place each week, month, or year. Unromantic (or forgetful) users of Outlook are hereby advised to schedule these recurring events in the Calendar: Valentine's Day, their significant other's birthday, and first-date and wedding anniversaries. Thanks to Outlook, no one will ever accuse you again of being cold-hearted or indifferent.

✦ **Meeting:** Same as an appointment except that you can invite others to attend. Scheduling meetings isn't covered in this book. See your network administrator for details.

Seeing Your Schedule

Going to a different day, week, or month

Use these techniques to go to different days, weeks, or months in the Calendar window:

✦ **To today:** On the Home tab, click the Today button. Clicking this button selects today's date on your calendar in whatever view you happen to be in.

✦ **To the next seven days:** On the Home tab, click the Next 7 Days button to see the next seven days starting with today's date.

✦ **To a specific day:** Click a day in the Date Navigator in the To-Do bar. You can also press Ctrl+G and select a day in the Go To Date dialog box. If you don't see the Date Navigator, go to the View tab, click the To-Do Bar button, and choose Date Navigator on the drop-down list.

✦ **To the previous or next day, work week, week, or month:** Click a Back or Forward arrow. These arrows are in the upper-left corner of the Calendar window and on either side of the month name in the Date Navigator.

TIP

Here's a quick way to go from month to month in the Date Navigator: Click the month name in the Date Navigator and hold down the mouse button. You see a list of month names. Drag the pointer to the name of the month you want to go to.

Use the scroll bar on the right side of the window to travel from hour to hour in Day view and Work Week view. In Week view and Month view, manipulating the scroll bar takes you from week to week.

Rearranging the Calendar window

To get a sense of what is expected of you and where you're supposed to be, go to the Home or View tab and click one of these buttons to rearrange your view of the Calendar window:

✦ **Day:** Shows today's date only.

✦ **Work Week:** Shows Monday through Friday of this week.

✦ **Week:** Shows the entire week, Sunday through Saturday.

✦ **Month:** Shows the entire month. In Month view, you can open the drop-down list on the Month button and choose a Detail option (Low, Medium, or High) to see increasing levels of information about the appointments and meetings you've scheduled.

Scheduling Appointments and Events

Now that you know how the Calendar window works, the next step is to fill the pages of the Calendar with all kinds of busywork. These pages explain how to schedule activities, schedule recurring activities, and magically transform an e-mail message into a Calendar item. You can find many intriguing shortcuts on these pages.

Scheduling an activity: The basics

Follow these basic steps to schedule an appointment, recurring appointment, event, or recurring event:

1. **Select the day in which you want to schedule the activity.**

TIP

If the activity occupies a certain time period, you can select the time period in Day or Week view and save yourself the trouble of entering a time period in the Appointment window. To select a time period, drag downward in the Calendar window. To create a half-hour appointment,

Using an e-mail message to schedule an appointment

Here's a neat little trick that can save you time when e-mail correspondence has to do with scheduling an appointment. To get a head start on scheduling, drag the e-mail message from the Inbox folder to the Calendar folder in the Navigation pane. On the theory that you want to schedule an appointment around the information in the e-mail message, the Appointment window appears on-screen. For the subject of the appointment, Outlook enters the subject of the e-mail message. The text of the e-mail message appears in the window as well. Fiddle with the particulars of the appointment and click the Save & Close button.

Scheduling an event

Select the All Day Event check box in the Appointment window (refer to Figure 4-2) to schedule an event, not an appointment. As I explain earlier, an event is an activity that lasts all day. In the Calendar, events are listed at the start of the day before appointments and meetings.

Canceling, Rescheduling, and Altering Activities

Canceling, rescheduling, and altering appointments and events is pretty easy. You can always double-click an activity to open an Appointment or Event window and change the particulars there. And you can take advantage of these shortcuts:

✦ **Canceling:** Select an activity, go the (Calendar Tools) Appointment tab, and click the Delete button. When you click the Delete button to cancel a recurring activity, a drop-down list appears on the Delete button so that you can delete one occurrence of the activity or the entire series.

✦ **Rescheduling:** Drag the activity to a new location in the schedule. Release the mouse button when the activity is in the new timeslot.

✦ **Changing start and end times:** In Day, Work Week, or Week view, move the pointer over the top or bottom of the activity and start dragging when you see the double arrow.

✦ **Changing the description:** Click in the activity's box and start typing or editing.

Chapter 5: Tasks, Reminders, and Notes

*T*his short chapter describes some Outlook goodies that were neglected in the other chapters of this mini-book. It explains how the Tasks window can help you meet your deadlines and how to be alerted when an activity is looming, a task deadline is arriving, an e-mail message needs your attention, or someone in your Contacts folder needs love and attention. Finally, it explain Outlook's digital stick 'em notes.

Tasks: Seeing What Needs to Get Done

As shown in Figure 5-1, use the Tasks window to see what needs to be done, when it's due, and whether it's overdue. On this list, due dates clearly show how smartly the whip is being cracked and how close you are to meeting or missing deadlines. A gray line appears across tasks that are done. Tasks that are overdue appear in red. Read on if you want to find out how to enter a task, attach a file to a task, and manage tasks in the Tasks window.

Examining tasks in the Tasks window

Juggling many different tasks is a high art, and to help you get better at it, the Tasks window offers these techniques for examining tasks that need doing:

✦ **Choose To-Do List or Tasks in the Navigation pane:** Under My Tasks at the top of the Navigation pane, choose To-Do List to examine all tasks, including those you fashioned from e-mail messages and Calendar appointments; choose Tasks to see only the tasks you set for yourself in the Tasks folder.

✦ **Arrange tasks:** On the View tab, open the Arrange By gallery and choose an option to arrange tasks on the Tasks list by Due Date, Category, Importance, or one of the other options.

✦ **Change views:** On the Home or View tab, click the Change View button and choose a View option. For example, choose Overdue or Next 7 Days to focus on the tasks that *really* need doing.

To display tasks on the To-Do bar (refer to Figure 5-1), go to the View tab, click the To-Do Bar button, and choose Task List. No matter which folder you're viewing in Outlook, you can double-click a task on the To-Do bar and see it in a Task window.

Handling and managing tasks

When the time comes to manage the tasks in the Tasks window, I hope you are a stern taskmaster. Here's advice for handling and managing tasks:

✦ **Marking a task as complete:** Click the check box beside the task name in the Tasks window. Outlook draws a line through completed tasks.

✦ **Deleting a task:** Select the task and click the Delete button or press the Delete key.

✦ **Editing a task:** Double-click a task in the Tasks window to open the Task window and change the particulars there.

Reminders for Being Alerted to Activities and Tasks

Outlook offers the Reminder message box to alert you when an appointment or event from the Calendar is about to take place (see Chapter 4 of this mini-book), when a task deadline is looming (see the preceding topic in this chapter), when an e-mail message needs a reply (see Chapter 3 of this mini-book), or when someone whose name is in your Contacts folder needs attention (see Chapter 2 of this mini-book).

Making Notes to Yourself
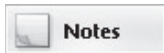
As shown in Figure 5-4, notes resemble the yellow stick 'em notes that you often see affixed to manuscripts and refrigerator doors. Click the Notes button in the Navigation pane to go to the Notes window. Write a note to mark down a deadline, for example, or remind yourself to take out the cat. Here are instructions for doing all and sundry with notes:
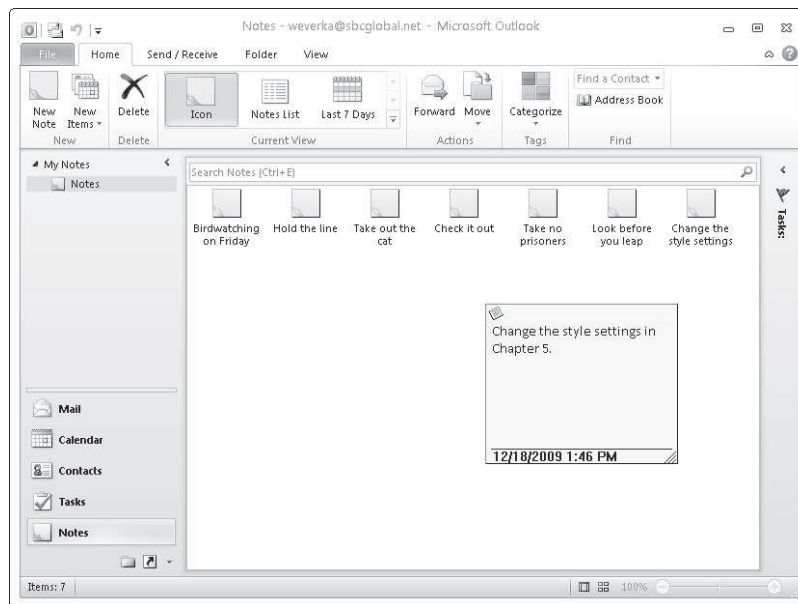
Figure 5-4:
Notes, notes, and more notes.

✦ **Creating a note:** Click the New Note button (or press Ctrl+N) and type the note in the Note window. Then click outside the window. You can create a note when you're not in the Notes window by clicking the New Items button and choosing More Items⇨Note on the drop-down list (or by pressing Ctrl+Shift+N).

✦ **Opening a note:** Double-click a note to read it in its Note window.

✦ **Forwarding a note:** To forward a note to someone in an e-mail message, right-click the note and choose Forward. A Message window opens so that you can address the message. The note arrives in the form of a file attachment, and the recipient must have Outlook in order to read it.

✦ **Deleting a note:** Select the note and click the Delete button or press the Delete key.