

5 Outlook 365

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IN THIS CHAPTER

- » Getting around in Outlook
- » Searching in folders
- » Deleting items
- » Archiving old-and-in-the-way items

Chapter 1

Outlook Basics

This chapter pulls back the curtain and gives you a first glimpse of *Outlook*, the emailer, calendar, and personal organizer in the Office 365 suite of applications. 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, 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 onscreen changes when you click a Navigation button on the bottom of the window. Click a Navigation button — Mail, Calendar, People, Tasks, Notes, Folders, or Shortcuts — and you go to a different Outlook window altogether.

Outlook serves many purposes. To wit, Outlook is all this:

- » **An email program:** You can use it to send and receive email messages and files, as well as organize email messages in different folders so that you can keep track of them. (See Chapter 3 of this minibook.)
- » **An appointment scheduler:** Outlook is a calendar for scheduling appointments and meetings. You can tell at a glance when and where you're

expected, be alerted to upcoming appointments and meetings, and invite coworkers to meetings. (See Chapter 4 of this minibook.)

- » **An address book:** The application can store the addresses, phone numbers, and email addresses of friends, foes, clients, and family members. Looking up this information in the Contacts folder is easy. (See Chapter 2 of this minibook.)
- » **A task reminder:** Outlook is a means of planning projects. You can tell when deadlines fall and plan your workload accordingly. (See Chapter 5 of this minibook.)
- » **A notes receptacle:** This part of the program is a place to jot down notes and reminders. (See Chapter 5 of this minibook.)

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. Recently arrived email messages are kept in the Inbox folder. Calendar items are kept in the Calendar folder. Contact information is kept in the People folder.

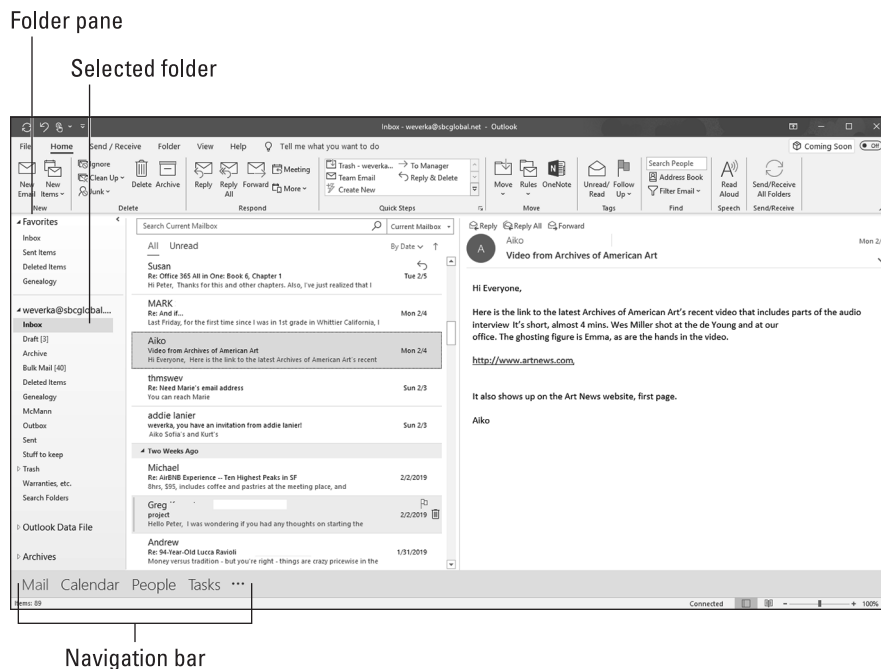


FIGURE 1-1: Mail window with the Inbox folder selected.

When you want to undertake a new task, you go to a different folder:



REMEMBER

» **Folder pane:** Select a folder in the Folder pane (refer to Figure 1-1). For example, click the Inbox folder to read incoming mail.

If you don't see the Folder pane, go to the View tab, click the Folder Pane button, and choose Normal on the drop-down list.

» **Navigation bar:** Click a button on the Navigation bar — Mail, Calendar, People, and so on (refer to Figure 1-1). Clicking one of these buttons displays folders that have to do, respectively, with the Mail, the Calendar, Contacts, and so on.



TIP

You can open a folder in a new window. To do so, right-click a Navigation button or folder name and choose Open in New Window.



TIP

If an abridged version of the Navigation bar appears along the bottom of the Outlook window and you want to see a Navigation bar like the one in Figure 1-1, click the Navigation Options button (the three dots on the Navigation bar) and choose Navigation Options on the pop-up list. The Navigation Options dialog box opens. Deselect the Compact Navigation check box and click OK.

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.

For example, select a contact or an email message.

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 1-2. 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 1-2. Then enter a name for your category and choose a color on the drop-down list. While you're at it, you can open the Shortcut Key drop-down list and choose a shortcut key combination for assigning your new category to items. Click the OK button in the Color Categories dialog box.
- **Renaming a category:** In the Color Categories dialog box (see Figure 1-2), select a color category and click the Rename button. Then enter a new name in place of the old one. You can choose a different color for your category by choosing a color in the Color drop-down list. To assign it a shortcut key, open the Shortcut Key drop-down list and choose a shortcut key combination.

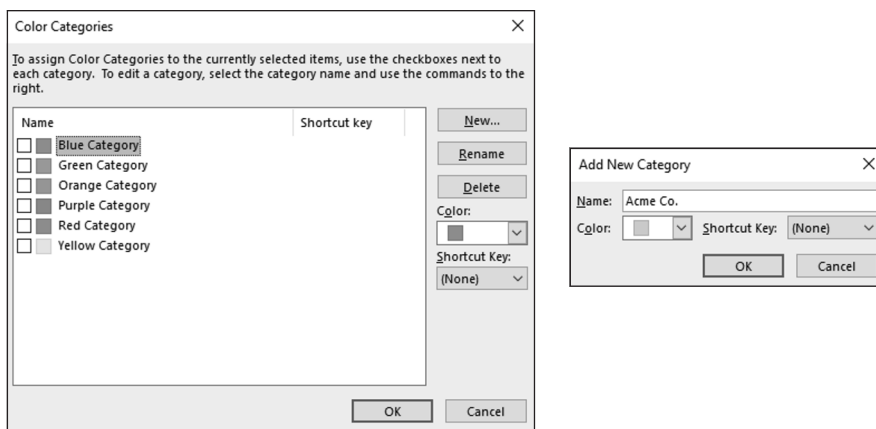


FIGURE 1-2: Click the New button or Rename button to create a new category.

To delete a category, return to the Color Categories dialog box, select the category's name, and click the Delete button. Although the category is deceased, items to which you assigned the category keep their category assignments.

Assigning items to categories

Follow these steps to assign a category to a folder item:

1. **Select the item.**
2. **On the Home tab, click the Categorize button and choose a category on the drop-down list.**

You can also right-click, choose Categorize, and select a category on the shortcut menu, or press a Ctrl+key combination if you assigned one to the category. An item can be assigned more than one category.

To remove a category assignment, select the item, click the Categorize button, and choose Clear All Categories.

Arranging items by category in folders

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

- » On the View tab, choose Categories in the Arrangement 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 a 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 1-3.

As the following pages explain, you can conduct an instant search, narrow your search by choosing Refine options, or conduct an advanced search starting from the (Search Tools) Search tab. Search results appear in the window below the Search box. To close the search and go back to seeing the contents of your folder, click the Close Search button (the X on the right side of the Search box).



TIP

Here's a fast way to run a search: Click the Recent Searches button on the (Search Tools) Search tab and choose a search on the drop-down list to rerun one of the last six searches you conducted.

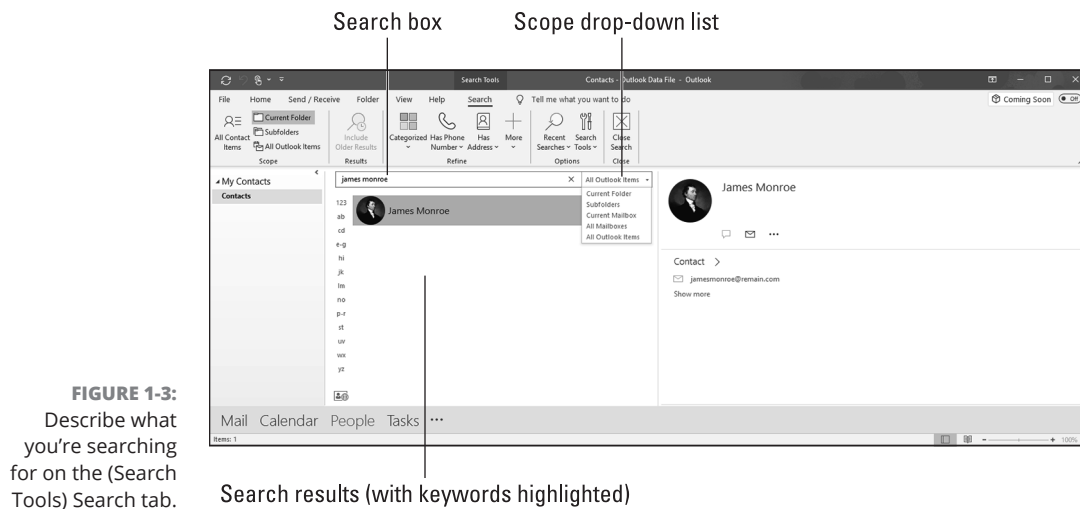


FIGURE 1-3: Describe what you're searching for on the (Search Tools) Search tab.

Conducting an instant search

What Microsoft calls an “instant search” is a keyword search of the folder you’re viewing. If a keyword you enter in the Search box is found in an email message, calendar appointment, contact, or other item, the item appears in the search results and the keyword is highlighted (refer to Figure 1-3). Search results begin appearing as soon as you start to type. You don’t have to press the Enter key to begin the search.



TIP

To change how instant searches are conducted, click the Search Tools button on the (Search Tools) Search tab and choose Search Options on the drop-down list. You go to the Search category in the Outlook Options dialog box. From there, you can choose which folders are searched and how search results are displayed when you conduct an instant search.

Refining a search

Refine a search when an instant search brings up too many or too few search results. Starting on the (Search Tools) Search tab, refine your search by changing its scope and choosing Refine options.

Changing the scope of a search

How wide the scope of a search is determines how many results are found in the search. Use these techniques to narrow or widen searches:

- » Click a button in the Scope group on the (Search Tools) Search tab.
- » Open the Scope drop-down list to the right of the Search box and choose an option (refer to Figure 1-3).

The options for changing the scope for searches are the following:

- » **Current Folder:** Searches the folder you selected on the Folder pane. You can also press Ctrl+Alt+K.
- » **Subfolders:** Expands the search to include the folder you selected on the Folder pane as well as its subfolders. You can also press Ctrl+Alt+Z.
- » **Current Mailbox (for email searching only):** Expands a search for email to include all folders that contain email, including the Drafts and Sent Items folders. You can also press Ctrl+Alt+A.
- » **All Outlook Items:** Expands the search to all Outlook folders. Move the pointer over the search results to see a pop-up box that lists which folder an item is stored in.

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 email, for example, you can click the From button and enter a sender name in the Search box to search for emails you received from a particular person. You can click the Subject button and enter a keyword to search the subject descriptions in email 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, as shown in Figure 1-4. In the Look 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.

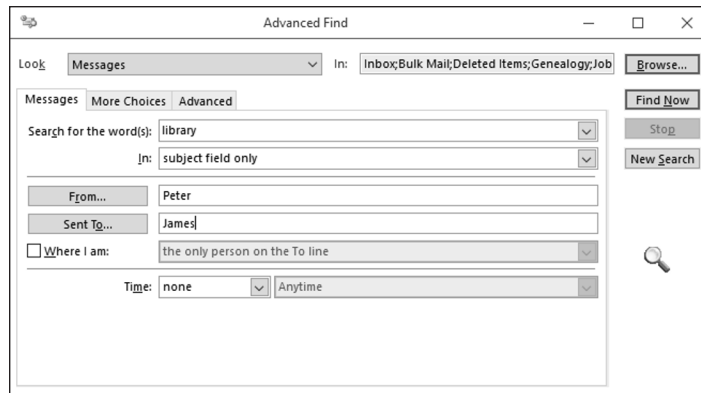


FIGURE 1-4: Pinpoint what you're searching for in the Advanced Find dialog box.

Deleting Email Messages, Contacts, Tasks, and Other Items

Outlook folders are notorious for filling quickly. Email messages, contacts, and tasks soon clog the folders if you spend any time in Outlook. From time to time, go through the email 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:

- » On the Home tab, click the Delete button.
- » Press the Delete key.
- » Right-click and choose Delete.



REMEMBER

Deleted items — email 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 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.

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 Email 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 email messages, tasks, and appointments older than six months in the *Archive folder*, a special folder for items that Outlook thinks are stale and not worth keeping anymore. Outlook calls sending these items to the Archive folder “autoarchiving.” Items that have been archived aren’t lost forever. You can visit them by opening the Archive Folders folder and its subfolders on the Folder pane. These folders and subfolders are created automatically the first time you archive items.

Archiving is a way of stripping your mail folders, tasks lists, and calendar of items that don’t matter anymore. How and when items are archived is up to you. To archive items, you can archive them on your own, establish a default set of archiving rules that apply to all folders, or, if a folder needs individual attention and shouldn’t be subject to the default archiving rules, establish special rules for that folder. Each folder can have its own set of archiving rules or be subject to the default rules.

To tell Outlook how to archive old stuff:

- » **Establishing default archiving rules:** On the File tab, choose Options to open the Outlook Options dialog box. Then, on the Advanced tab, click the AutoArchive Settings button. You see the AutoArchive dialog box shown in Figure 1-5. See the upcoming section “Default archiving rules.”
- » **Establishing rules for a specific folder:** Select the folder, go to the Folder tab, and click the AutoArchive Settings button. You see the AutoArchive tab of the Properties dialog box, as shown in Figure 1-5. See “Archiving rules for a folder.”

Default archiving rules

Negotiate these options in the AutoArchive dialog box to establish default archiving rules (see Figure 1-5):

- » **Run AutoArchive Every:** Enter a number to tell Outlook how often to archive items.

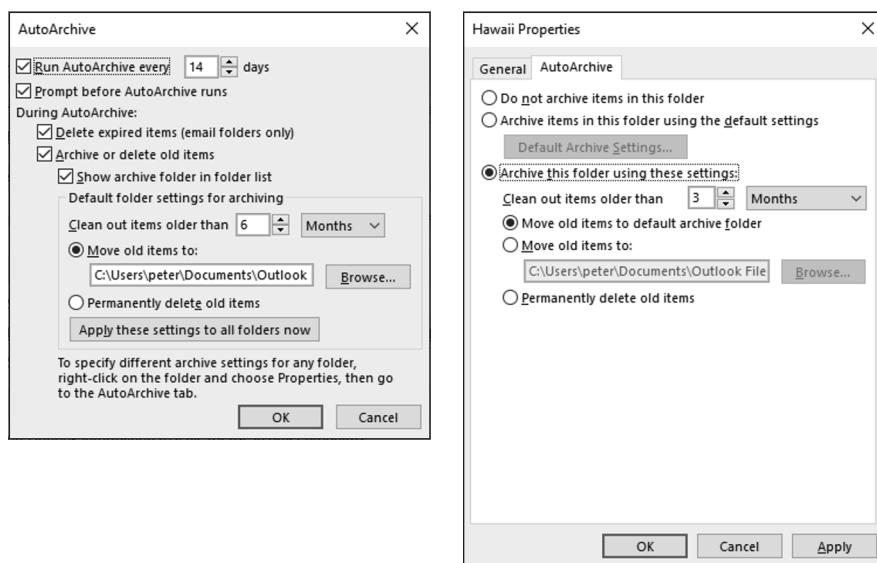


FIGURE 1-5: Making the default archiving rules (left) and rules for a folder (right).

- » **Prompt Before Archive Runs:** If this check box is selected, you see a message box before archiving begins, and you can decline to archive if you want by selecting No in the message box.
- » **Delete Expired Items (Email Folders Only):** Select this check box to delete all email messages when the time period has expired.
- » **Archive or Delete Old Items:** Deselect this option if you *don't* want to archive items.
- » **Show Archive Folder in Folder List:** Select this option if you want to keep the archived version of the folder in the Folder pane. Archived items are kept in this folder so that you can review them.
- » **Clean Out Items Older Than:** Choose a cut-off time period after which to archive items.
- » **Move Old Items To:** Click the Browse button and select a folder if you want to store the Archive file in a certain location.
- » **Permanently Delete Old Items:** Select this option if you want to delete, not archive, old items.

Archiving rules for a folder

Choose among these options in the Properties dialog box to establish archiving rules for a specific folder (refer to Figure 1-5):

- » **Do Not Archive Items in This Folder:** Select this option if items in the folder aren't worth archiving.
- » **Archive Items in This Folder Using the Default Settings:** Select this option to defer to the default archiving rules for the folder.
- » **Archive This Folder Using These Settings:** Select this option to establish archiving rules for the folder.
- » **Clean Out Items Older Than:** Choose a cut-off time period after which to archive the items in the folder.
- » **Move Old Items to the Default Archive Folder:** Select this option to move items to the folder you selected as the default.
- » **Move Old Items To:** Click the Browse button and select a folder if you want to store the archived items in a specific location.
- » **Permanently Delete Old Items:** Select this option if you want to delete, not archive, items in this folder.



TIP

Besides archiving, another way to remove bric-a-brac automatically is to delete certain kinds of email messages when they arrive. See Chapter 3 of this minibook for more information.

Running the Mailbox Cleanup command

The Mailbox Cleanup command is an all-purpose command for finding email messages, archiving items, deleting items, and deleting alternate versions of items. To use the command, go to the File tab, choose Info, click the Tools button, and choose Mailbox Cleanup. You see the Mailbox Cleanup dialog box, shown in Figure 1-6. The dialog box offers a speedy entrée into these different Outlook tasks:

- » **Seeing how much disk space folders occupy:** Click the View Mailbox Size button and then take note of folder sizes in the Folder Size dialog box.
- » **Finding items:** Select an option button to find items older than a certain number of days or larger than a certain number of kilobytes, enter a days or kilobytes number, and click the Find button. You land in the Advanced Find dialog box. Earlier in this chapter, “Conducting an advanced search” explains this dialog box. Use it to select items and delete them.
- » **Archiving items:** Click the AutoArchive button to archive items in your folders. See “Archiving the old stuff,” earlier in this chapter, for details.

- » **Emptying the deleted items folder:** Click the Empty button to empty the Deleted Items folder. See “Deleting Email Messages, Contacts, Tasks, and Other Items,” earlier in this chapter.
- » **Delete all alternative versions of items:** Click Delete if you conduct emailing through an Exchange Server account and you want to delete alternative versions of items that were created during synchronization.

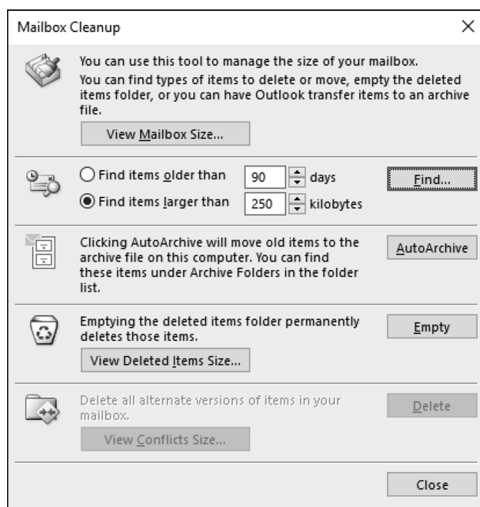


FIGURE 1-6: Mucking out the mail boxes.

IN THIS CHAPTER

- » Recording information about a new contact
- » Creating a contact group
- » Locating a contact in the Contacts folder
- » Sharing your Contacts folder with coworkers

Chapter 2

Maintaining 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, email addresses, web pages, birthdays, anniversaries, nicknames, and other stuff besides. When you address an email, you can get it straight from the Contacts folder to be sure that the address is entered correctly.

This short but happy chapter explains how to maintain a 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. The chapter also describes how to share contacts with others in a work environment.

To open the Contacts folder, click the People navigation button or click the Contacts folder in the Folder pane.

Maintaining a Happy and Healthy Contacts Folder

The Contacts folder is where Outlook stores information about friends, family, and coworkers. To open the Contacts folder, click People on the Navigation bar along the bottom of the screen.

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.

Entering a new contact in the Contacts folder

To place someone in the Contacts List, start by doing one of the following:

- » On the Home tab, click the New Contact button (or click the New Items button and choose Contact on the drop-down list).
- » Press Ctrl+N (in the Contacts window) or Ctrl+Shift+C (in another window).

You see the Contact form, as shown in Figure 2-1. In this form are places for entering just about everything there is to know about a person except his or her favorite ice cream flavor. Enter all the information you care to record, keeping in mind these rules of the road as you go along:



WARNING

- » **Full names, addresses, and so on:** Although you may be tempted to simply enter addresses, phone numbers, names, and so on in the text boxes, don't do it! Click the Full Name button, for example, to enter a name (refer to Figure 2-1). Click the Business or Home button to enter an address in the Check Address dialog box (refer to Figure 2-1). By clicking these buttons and entering data in dialog boxes, you permit Outlook to separate the component parts of names, addresses, and phone numbers. This way, Outlook can use names and addresses as a source for mass mailings and mass emailings.

When entering information about a company, not a person, leave the Full Name field blank and enter the company's name in the Company field.

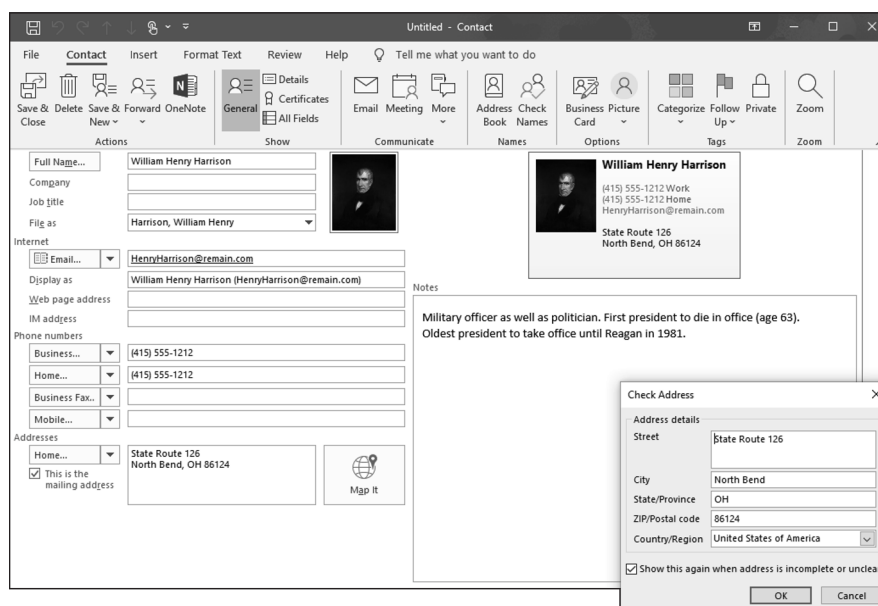


FIGURE 2-1:
A Contact form.

- » **Information that matters to you:** If the form doesn't appear to have a place for entering a certain kind of information, try clicking a triangle button and choosing a new information category from the pop-up menu. Click the triangle button next to the Business button and choose Home, for example, if you want to enter a home address rather than a business address.
- » **File As:** Open the File As drop-down list and choose an option for filing the contact in the Contacts folder. Contacts are filed alphabetically by last name, first name, company name, or combinations of the three. Choose the option that best describes how you expect to find the contact in the Contacts folder.
- » **Mailing addresses:** If you keep more than one address for a contact, display the address to which you want to send mail and select the This Is the Mailing Address check box. This way, in a mass mailing, letters are sent to the correct address.
- » **Email addresses:** You can enter up to three email addresses for each contact. (Click the triangle button next to the Email button and choose Email 2 or Email 3 to enter a second or third address.) In the Display As text box, Outlook shows you what the To: line of email messages looks like when you send email to a contact. By default, the To: line shows the contact's name followed by his or her email address in parentheses. However, you can enter whatever you want in the Display As text box, and if entering something

Maintaining the
Contacts Folder

different helps you distinguish between email addresses, enter something different. For example, enter Lydia – Personal so that you can tell when you send email to Lydia's personal address as opposed to her business address.

» **Photos:** To put a digital photo in a Contact form, click the Add Contact Picture placeholder, and in the Add Contact Picture dialog box, select a picture and click OK.

» **Details:** To keep a detailed dossier on a contact, click the Details button (you may have to click the Show button first, depending on the size of your Contact form) and enter information in the Details window. This window offers places for recording birthdays and other minutiae. Click the General button when you finish entering details.



TIP

Be sure to write a few words in the Notes box to describe how and where you met the contact. When the time comes to weed out contacts in the Contacts folder list, reading these descriptions helps you decide who gets weeded and who doesn't.

When you finish entering information, click the Save & Close button. If you're in a hurry to enter contacts, click the Save & New button. Doing so opens an empty form so that you can record information about another contact.



TIP

Want to add the name of someone who sent you an email message to the Contacts folder? Right-click the sender's name in the message window and choose Add to Outlook Contacts on the shortcut menu.

Changing a contact's information

To change a contact's information, double-click a contact name to open the Contact window, make your changes, and click the Save & Close button.



TIP

While you're in the Contact window, try clicking the All Fields button and entering information in the All Fields window. As shown in Figure 2-2, the All Fields window lists fields in a line-by-line fashion. Choose an option on the Select From drop-down list, scroll in the form, and update fields as necessary.

MAPPING OUT AN ADDRESS

To find your way to a contact's home or place of business, click the Map It button in the Contact window. As long as your computer is connected to the Internet and an address is on file for the contact, your web browser opens to the Bing.com website, where you find a map with the address at its center. You can get driving directions from this map. Good luck getting there!

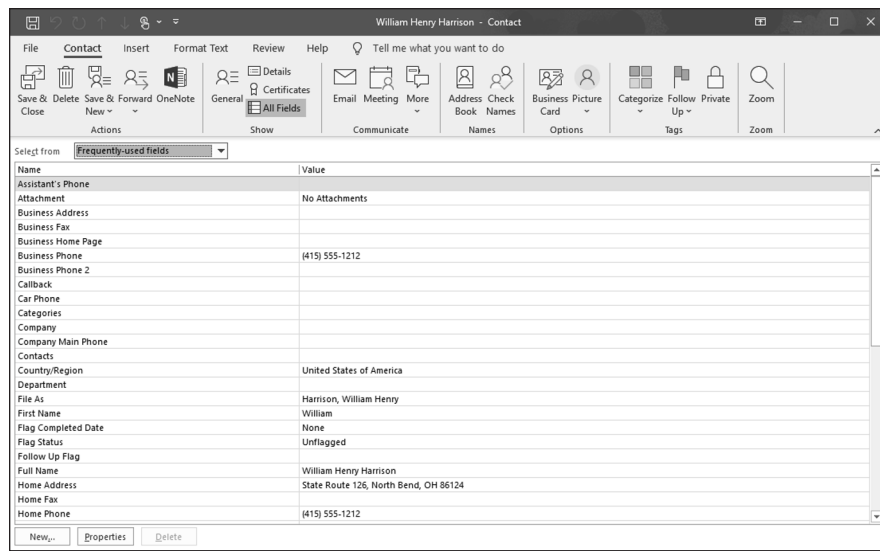


FIGURE 2-2:
Editing contact
data in the All
Fields window.

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 email messages to the same group of people on a regular basis. You might be in the same boat. You might have to send email messages to the same 10 or 12 people from time to time. Entering email addresses for that many people each time you want to send email is a drag. To keep from having to enter so many email addresses, you can create a *contact group*, a list with multiple email addresses. To address your email message, you simply enter the name of the contact group, not the individual names, as shown in Figure 2-3.

Creating a contact group

Follow these steps to bundle email 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.**

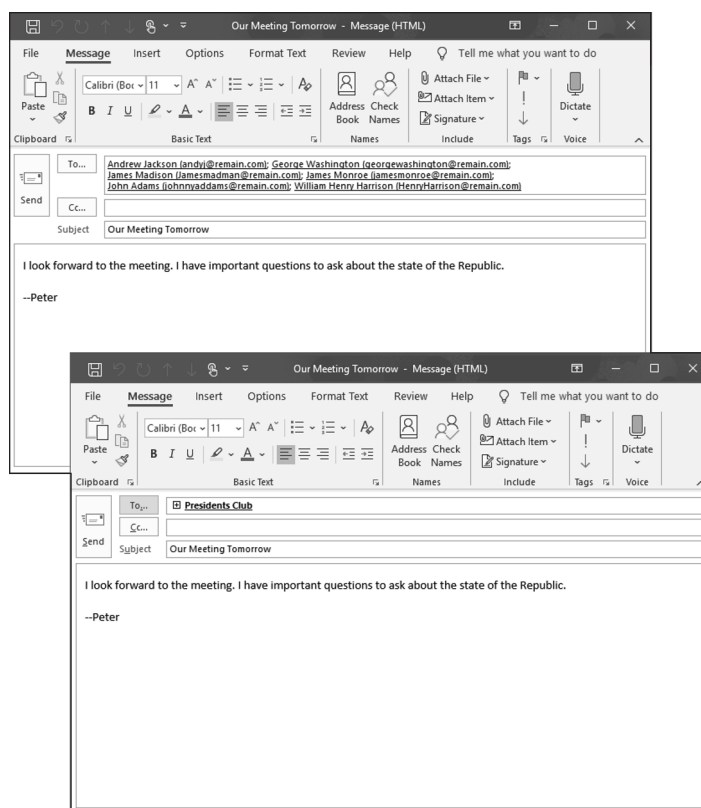


FIGURE 2-3:
Instead of entering many addresses (top), enter a contact group name (bottom).

3. Click the Add Members button and choose an option on the drop-down list to tell Outlook where you store the addresses of friends and colleagues.

If you're a loyal user of Outlook, you likely choose From Outlook Contacts. You see the Select Members dialog box.

4. Hold down the Ctrl key and select the name of each person you want to include in the contact group.

5. Click the Members button and click OK.

You can find the Members button in the lower-left corner of the dialog box. The names you chose appear in the Contact Group window.

You can add the names of people who aren't in your Contacts folder by clicking the Add Members button, choosing New Email Contact on the drop-down list, and filling out the Add New Member dialog box.

6. Click the Save & Close button in the Contact Group window.

In the Contacts folder, contact group names are marked with the Contact group icon.

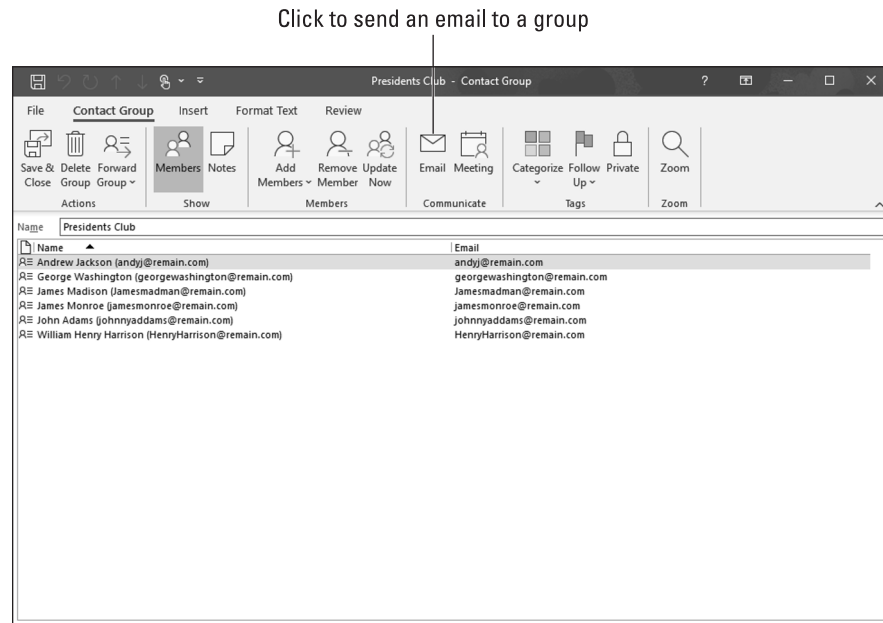


FIGURE 2-4:
Entering
addresses for a
contact group.

Addressing email to a contact group

To address an email message to a contact group, start in the Inbox folder and click the New Email button on the Home tab. A Message window opens. Click the To button to open the Select Names dialog box and then select a contact group name. Contact group names appear in boldface and are marked with a Contact Group icon.



TIP

The fastest way to address email to a contact group is to start in the Contacts folder, double-click the group's name to open the Contact Group window (refer to Figure 2-4), and then click the Email button.

Editing a contact group

The names of contact groups appear in the Contacts folder. You can treat groups like other contacts. In the Contacts folder, double-click a contact group name to open the Contact Group window (refer to Figure 2-4). From there, you can add names to a group, remove names from a group, and delete a group.

Finding a Contact in the Contacts Folder

The Contacts folder can grow very large, so Outlook offers a number of ways to locate contacts. Here are some techniques for locating a contact in the Contacts folder:

- » **Use the scroll bar:** Click the arrows or drag the scroll box to move through the list.
- » **Click a letter button:** Click a letter button on the left 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: People, Business Card, Card, Phone, or List. Changing views often helps in a search.
- » **Search Contacts text box:** Enter a keyword in the Search Contacts text box. (See Chapter 1 of this minibook for instructions about searching for items in folders.)

Linking Duplicate Contacts

What if you correspond with a person in Outlook who goes by two different names? For example, suppose you trade emails with Jane Smith at `janesmith@company.com`, but Jane recently got married and changed her name and email address to Jane Curry at `jane Curry@company.com`. To tell Outlook that Jane Smith and Jane Curry are one and the same, you can link your Jane Smith contact and your Jane Curry contact. To perform this task, however, you must use the Outlook Web App (Book 10, Chapter 1 describes the Office Web Apps).

Follow these steps to link two Outlook contacts:

1. **In the Outlook Web App, navigate to the People module.**
2. **Select the duplicate contacts you want to link.**

To select contacts, select the check boxes in the first column of the contacts list, as shown in Figure 2-5.

3. **On the navigation bar, click Link.**

Outlook Web App combines the contact cards into a single card.

4. **Open the new, combined contact card and make edits as necessary.**

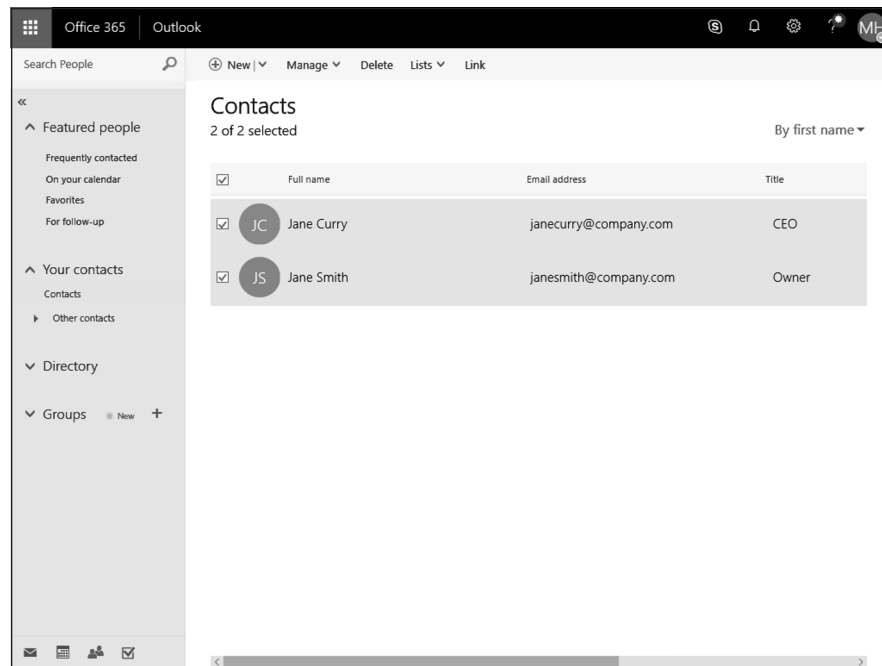


FIGURE 2-5:
Link duplicate
contacts to make
the contact list
easier to manage.



You can use the Link command to combine duplicate contacts with different forms of the same name. For example, you could combine separate contact cards for Thomas Nagurney and Tommy Nagurney into a single contact named Tom Nagurney.

TIP

Sharing Contacts with Coworkers

In the Outlook, all contacts are stored in a single folder called, not surprisingly, Contacts. What if you want to share your Contact folder with a colleague? You can do it as long as you and your colleague are in the same Office 365 organization. You can do it, in other words, if you and your colleague are in the same workplace operating under the auspices of a Microsoft Exchange Server.

Contacts you share with others (and contacts others share with you) are “read only.” That means that you can view the contact information but not alter it in any way. Only the person who shared the contacts initially can alter contact information. Of course, anyone can use shared contacts to address email messages and to create appointments, as usual.



WARNING

Contact folders you create apart from the default Contacts folder can't be shared with colleagues. Only the default Contacts folder can be shared.

Sharing your Contacts folder

Follow these steps to share the default Contacts folder with a coworker:

1. **Click People on the navigation bar, if necessary.**
2. **Make sure the Contacts folder is selected.**

Unless you created contact folders apart from the default folder, the built-in Contacts folder is selected automatically.

3. **On the Folder tab, click the Share Contacts button.**

This button is located in the Share group. A new email message appears. The message invites your coworker to view your Contacts folder, as shown in Figure 2-6.

4. **Address and send the email message.**

While you're at it, you might tell the recipient that you are sharing the contacts in your Contacts folder.

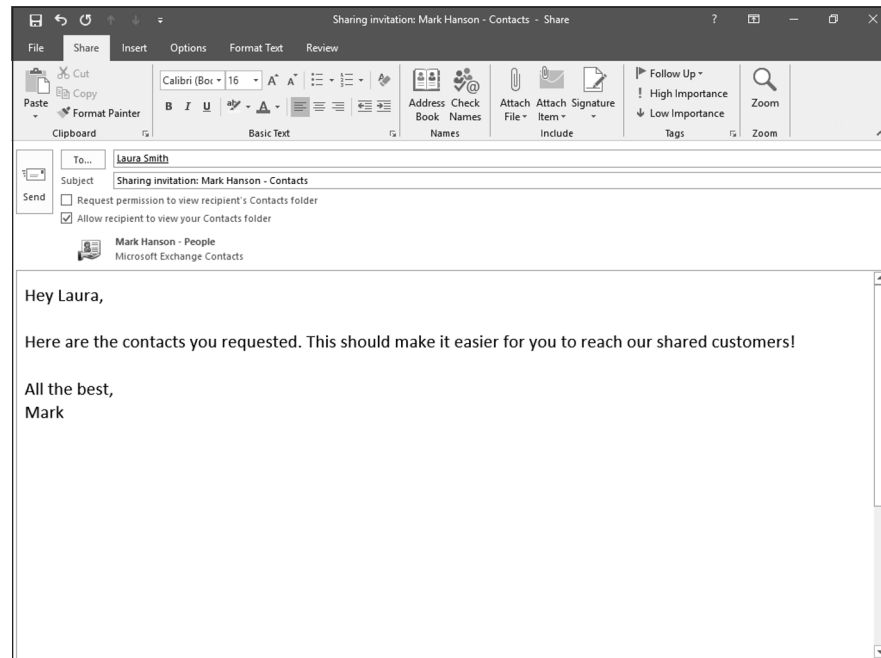


FIGURE 2-6:
An invitation
to share a
Contacts folder.



TIP

To “unshare” a Contacts folder you regret sharing with a colleague, select the Contacts folder if necessary, visit the Folder tab, and click the Folder Properties button. The Contacts Properties dialog box opens. On the Permissions tab, select your colleague’s name and click Remove.

Sharing someone else’s contacts

You can tell which contacts in your Contacts folder were shared with you — and are “read only” — because they show up in the Shared Contacts listing. Contacts that colleagues have shared with you are like other contacts. You can send email to these contacts, for example. A shared contact is different only insofar as you can’t edit or alter it in any way.

Printing the Contacts Folder

The paperless office hasn’t arrived yet in spite of numerous predictions to the contrary, and sometimes you need 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 folder. 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, choose a view in the Current View gallery.

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:

- If you start in People, Business Card, or Card view, you can print Contacts information in these styles: card style, booklet style, memo style, or phone directory style. (You find out what these styles are shortly.)
- If you start in Phone or List view, you can print only in table style.

2. Press Ctrl+P.

You see the Print window, as shown in Figure 2-7.



TIP

3. Under Settings, choose an option.

Glance at the right side of the window to see what the option choices are and choose the option that suits you best.

4. Click the Print Options button if you want to change the number of columns that are printed, change fonts, change headers and footers, or otherwise fiddle with the printed pages.

The next section in this chapter explains these options.

5. Click the Print button to start printing.

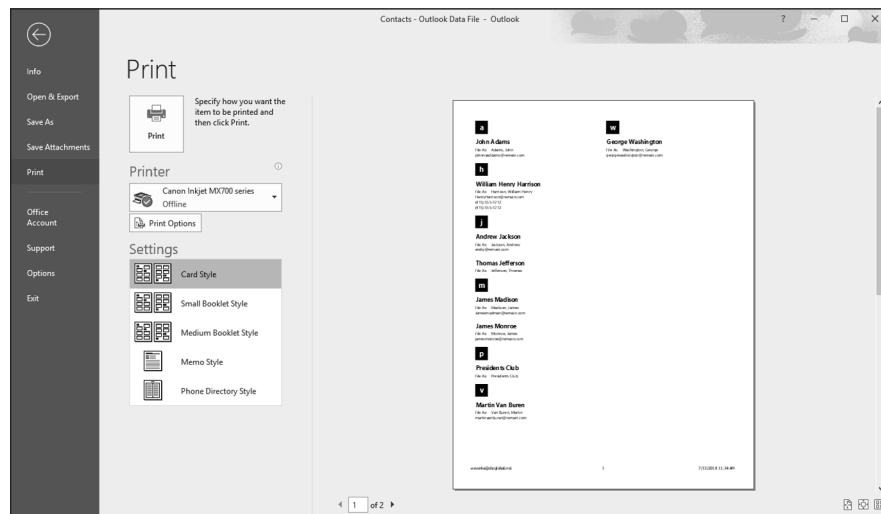


FIGURE 2-7: Printing contact information.

Changing the look of printed pages

To determine what Contact folder information looks like when you print it, click the Print Options button in the Print window (refer to Figure 2-5). You see the Print dialog box. In this dialog box, click the Page Setup button and choose options on the Format tab of the Page Setup dialog box to change the look of the printed pages:

- » **Where contact information is printed:** Contact information is printed alphabetically, with a letter heading to mark where the As, Bs, Cs, and so on begin. To place contacts that begin with each letter on separate pages, select the Start on a New Page option button.
- » **Number of columns:** Choose a number in the Number of Columns drop-down list to tell Outlook how many columns you want.

- » **Blank forms at end:** Choose a number (or None) on the drop-down list to place forms at the end of the pages for people to write down more addresses.
- » **Contact index on side:** Select the Contact Index on Side check box to print thumbnail letter headings on the sides of pages.
- » **Letter headings for each letter:** To remove the letter headings that mark where contacts starting with a certain letter begin, deselect the Headings for Each letter check box.
- » **Fonts and font sizes:** Click a Font button and choose a different font or font size for headings and body text.
- » **Gray shades:** Choose this option to make gray shades appear behind contact names.

In the Header/Footer tab, the three boxes are for deciding what appears on the left side, middle, and right side of headers and footers. Type whatever you please into these text boxes. You can also click buttons in the dialog box to enter fields — a page number, total page number, printing date, printing time, or your name — in headers and footers.

IN THIS CHAPTER

- » **Configuring an email account for Outlook**
- » **Sending and receiving email messages and files**
- » **Organizing and storing your email**
- » **Preventing junk email**

Chapter **3**

Handling Your Email

“**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. Emailers face a different set of difficulties. Instead of snow, rain, or gloomy nights, they face the task of having to manage volumes of email.

This chapter explains the basics of sending and receiving email, but it also goes a step further to help you organize and manage your email messages. It shows you how to send files and pictures with email messages. You also find out how to reorganize email 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 email and explains how to prevent junk email from arriving on your digital doorstep.

Setting Up an Email Account

Before you can send and receive email, you must provide Outlook with connection information about your email service. You can use Outlook to manage email from a Google Mail account, Yahoo mail, and just about any other email service. Outlook needs your name, your email address, and the password with which you log on to the email service.

You can configure Outlook to send and retrieve email from more than one account. For each email account you configure, Outlook places a new folder profile in the Folder pane.

Follow these steps to configure an email account with Outlook:

1. On the File tab, choose Info.

The Account Information window opens.

2. Click the Add Account button.

You see the Add Account dialog box.

3. Enter your email address and click Connect.

4. Enter your password and click Connect.

If all goes well, the connection is made and Outlook places a new folder profile in the Folder pane.

If Outlook can't configure your account, you are asked to configure the account manually. To do so, you likely need the following, which you can obtain by seeking help online from your email service provider:

» **POP3 (Post Office Protocol version 3)**, the protocol for retrieving messages from your email provider's incoming mail server. Outlook needs an IP address or domain name system (DNS) name, something like *inbound.att.net*.

» **SMTP (Simple Mail Transfer Protocol)**, the protocol for sending messages through your provider's outgoing mail server. Outlook needs an IP address or DNS name, something like *outbound.attn.net*.

» **IMAP (Internet Message Access Protocol)**, the protocol for reading and managing messages stored on a server, not on the user's computer. Outlook needs your password.

To delete an email account, go to the File tab and choose Info. Then click the Account Settings button and choose Account Settings on the drop-down list. In the Account Settings dialog box, select the account and click the Remove button.

Addressing and Sending Email Messages

Sadly, you can't send chocolates or locks of hair by email, 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 email messages, reply to and forward email, send email from different accounts, and postpone sending a message. Better keep reading.

The basics: Sending an email message

The first half of this chapter addresses everything you need to know about sending email messages. Here are the basics:

1. In any mail folder, click the New Email button on the Home tab (or press Ctrl+N).

A Message window like the one in Figure 3-1 appears. You can open this window in a folder apart from mail folders by clicking the New Items button and choosing Email Message on the drop-down list (or by pressing Ctrl+Shift+M). The New Items button is located on the Home tab.

2. Enter the recipient's email address in the To text box.

The next topic in this chapter, “Addressing an email message,” explains the numerous ways to address an email message. You can address the same message to more than one person by entering more than one address in the To text box. For that matter, you can send copies of the message and blind copies of the message to others (see “Sending copies and blind copies of messages,” later in this chapter).

3. In the Subject text box, enter a descriptive title for the message.

When your message arrives on the other end, the recipient sees the subject first. Enter a descriptive subject that helps the recipient prioritize the message. After you enter the subject, it appears in the title bar of the Message window.

4. Type the message.

Whatever you do, don't forget to enter the message itself! You can spell-check your message by pressing F7 or clicking the Spelling & Grammar button on the Review tab.

5. Click the Send button (or press Alt+S).

Messages remain in the Outbox folder if you postpone sending them or if Outlook can't send them right away because your computer isn't connected to the Internet.



TIP

If you decide in the middle of writing a message to write the rest of it later, click the Save button on the Quick Access toolbar (or press Ctrl+S) and close the Message window. The message lands in the Drafts folder. When you're ready to finish writing the message, open the Drafts folder and double-click your unfinished message to resume writing it.

Copies of the email messages you send are kept in the Sent Items folder, where you can review messages you sent.

MAKING OUTLOOK YOUR DEFAULT EMAIL PROGRAM

The default email program is the one that opens when you click an email hyperlink on a web page or give the order to send an Office file from inside an Office program. Follow these steps if you want to make Outlook the default email program on your computer:

1. Go to the File tab and choose Options.
2. In the Outlook Options dialog box, visit the General category.
3. Select the Make Outlook the Default Program for Email, Contacts, and Calendar check box.
4. Click OK.

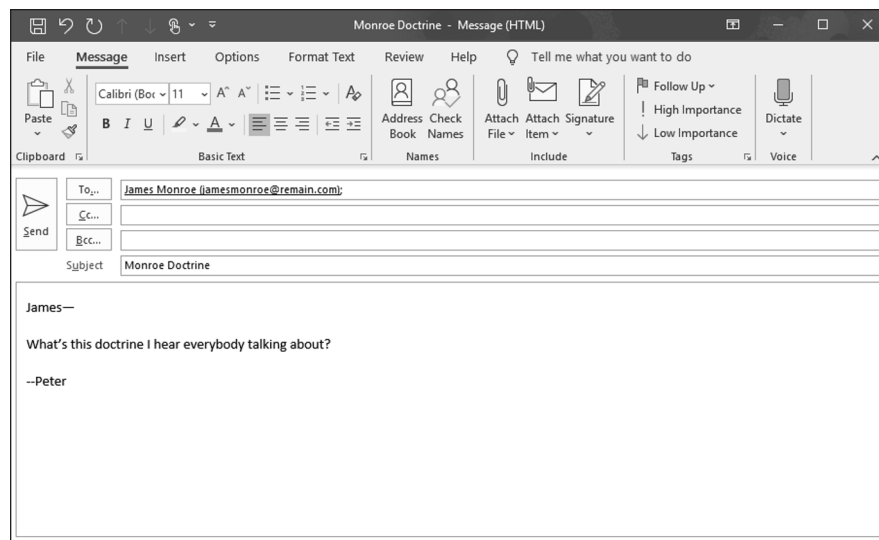


FIGURE 3-1: Addressing and composing an email message.

Addressing an email message

How do you address an email message in the To text box of the Message window (to see the Message window, refer to Figure 3-1)? Let me count the ways:

- » **Type a person's name from the Contacts folder:** Simply type a person's name, as shown in Figure 3-2. If the name is on file in the Contacts folder,

a drop-down list with the name appears, and you can select the name on the drop-down list.

- » **Get the address (or addresses) from the Contacts folder:** Click the To (or Cc) button to send a message to someone whose name is on file in your Contacts folder. You see the Select Names dialog box, as shown in Figure 3-2. Click or Ctrl+click to select the names of people to whom you want to send the message. Then click the To button (or the Cc or Bcc button) to enter addresses in the To text box (or the Cc or Bcc text box) of the Message window. Click OK to return to the Message window. This is the easiest way to address an email message to several different people.
- » **Type the address:** Type the address if you know it offhand. You can paste an address into the Message window by right-clicking and choosing the Paste command.

Click To or Cc and choose names

Type and choose a name

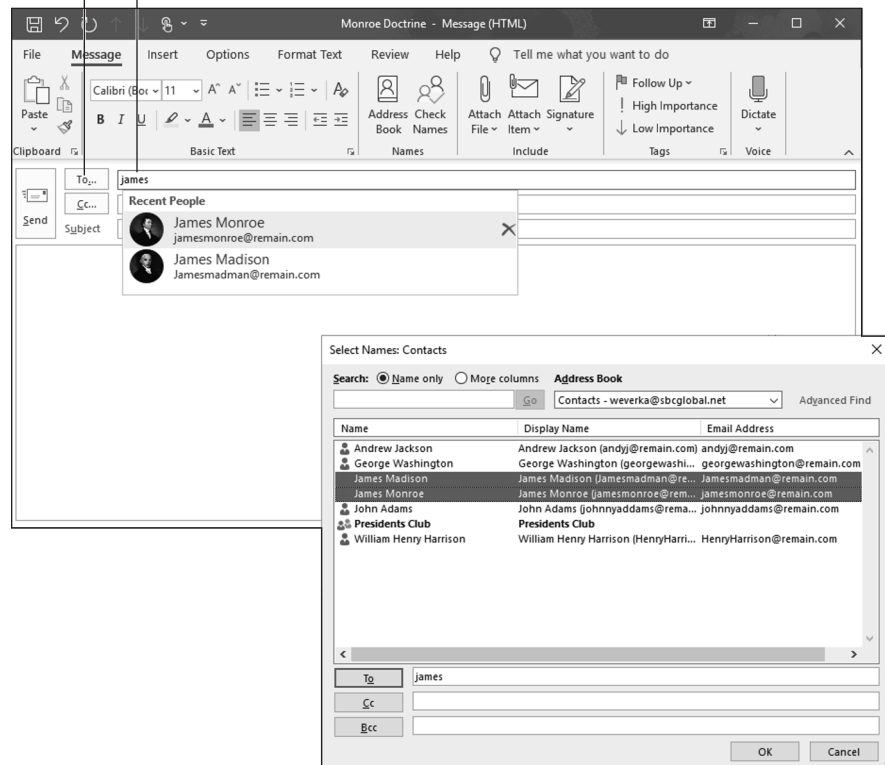


FIGURE 3-2: Getting addresses from the Contacts folder.

» **Reply to a message sent to you:** Select the message in the Inbox folder and click the Reply button. The Message window opens with the address of the person to whom you're replying already entered in the To text box. You can also click the Reply All button to reply to enter the email addresses of all the people to whom the original message was sent.



TIP

You can create contact groups for sending the same email message to a group of people without having to enter an address for each recipient. For information about contact groups, see Chapter 2 of this minibook.

Sending copies and blind copies of messages

When you send a copy of a message, the person who receives the message knows that copies have been sent because the names of people to whom copies were sent appear at the top of the email message. But when you send blind copies, the person who receives the message doesn't know that others received it. Send a blind copy when you prefer the recipient *not* to know that others also received the message.

Follow these instructions to send copies and blind copies of messages:

» **Send a copy of a message:** Enter email addresses in the Cc text box of the Message window, or in the Select Names dialog box (refer to Figure 3-2), select names and then click the Cc button.

» **Send a blind copy of a message:** Click the Bcc button in the Message window to open the Select Names dialog box (refer to Figure 3-2), select names, and click the Bcc button or else enter addresses in the Bcc text box.



TECHNICAL
STUFF

Why are these buttons called Cc and Bcc? The Cc stands for “carbon copy” and the Bcc stands for “blind carbon copy.” These terms originated in the Mesozoic era when letters were composed on the typewriter, and to make a copy of a letter, you inserted carbon paper between two paper sheets and typed away.

Replying to and forwarding email messages

Replying to and forwarding messages is as easy as pie. For one thing, you don't need to know the recipient's email address to reply to a message. In the Inbox, select or open the message you want to reply to or forward and do the following on the Home tab, Message tab, or Reading pane:

- » **Reply to author:** Click the Reply button (or press Ctrl+R). The Message window or Reading pane opens with the sender's name already entered in the To box and the original message in the text box below. Write a reply and click the Send button.
- » **Reply to all parties who received the message:** Click the Reply All button (or press Ctrl+Shift+R). The Message window or Reading pane opens with the names of all parties who received the message in the To and Cc boxes and the original message in the text box. Type your reply and click the Send button.
- » **Forward a message:** Click the Forward button (or press Ctrl+F). The Message window or Reading pane opens with the text of the original message. Either enter an email address in the To text box or click the To button to open the Select Names dialog box and then select the names of the parties to whom the message will be forwarded. Add a word or two to the original message if you like; then click the Send button.



WARNING

Forwarding a message to a third party without the permission of the original author is a breach of etiquette and very bad manners. I could tell you a story about an email message of mine that an unwitting editor forwarded to a cantankerous publisher, but I'm saving that story for the soap opera edition of this book.



TIP

To add a sender's name to the Contacts folder, right-click the name in the Message window and choose Add to Outlook Contacts.

AUTO-REPLYING TO MESSAGES

An *auto-reply* (automatic reply) is a message sent automatically to everyone who sends you a message. An auto-reply goes something like this: "I'm on vacation till Tuesday and can't reply to your message. But as soon as I return, I'll reply to you." Use auto-replies to inform people that you aren't neglecting them, you just can't reply because you're in meetings, on vacation, or otherwise occupied.

Only people who run Outlook through a Microsoft Exchange server can send auto-replies. What this means in real terms is that only people whose computers are connected to a network can auto-reply to messages.

Follow these steps to find out whether your Outlook account is run through a Microsoft Exchange server:

1. **On the File tab, choose Info to open the Account Information window.**
2. **Click the Account Settings button and choose Account Settings to open the Account Settings dialog box.**

(continued)

(continued)

- 3. In the Type column, look for the words “Microsoft Exchange.” If you see these words, you can send auto-replies to messages.**

Follow these steps to write an auto-reply and instruct Outlook to send it to all who send you messages:

- 1. On the File tab, choose Info.**
- 2. Choose Automatic Replies (Out of Office) to open the Automatic Replies dialog box.**
- 3. Click the Send Automatic Replies check box.**
- 4. Choose a start time and end time for sending auto-replies.**
- 5. On the Inside My Organization tab, enter the auto-reply that you want to send to your coworkers.**
- 6. On the Outside My Organization tab, enter the auto-reply you want to send people outside your network.**
- 7. Click OK.**

Sending Files and Photos

Yes, it can be done. You can send files and photos along with your email messages. As long as you know where the file or photo is stored on your computer or OneDrive, you can send it lickety-split. (Book 10, Chapter 1 explains OneDrive.)

Sending a file along with a message

Sending a file along with an email message is called *attaching* a file in Outlook lingo. You can send a file or several files along with an email message by following these steps:

- 1. In the Message window, go to the Message or Insert tab and click the Attach File button.**

A drop-down list appears with the names of files you sent recently. If the file you want to send is on the list, select its name and be done with it; if the file's name isn't on the list, keep reading.

- 2. Choose Browse This PC (or if you keep files on OneDrive, choose Browse Web Locations and select OneDrive on the submenu).**

You see the Insert File dialog box.

- 3. Locate and select the file that you want to send along with your email message.**

Ctrl+click filenames to select more than one file.

- 4. Click the Insert button.**

The name of the file (or files) appears in the Attached text box in the Message window. Address the message and type a note to send along with the file. You can open the drop-down list on a filename in the Attach text box and choose Open to open a file you're about to send. Or, if you change your mind about sending the file, you can choose Remove Attachment.



TIP

Here's a fast way to attach a file to a message: Find the file in File Explorer and drag it into the Message window. The file's name appears in the Attach box as though you placed it there by clicking the Attach File button.

Including a photo in an email message

As shown in Figure 3-3, you can include a photo in the body of an email message. Follow these steps:

- 1. In the Message window, go to the Insert tab.**
- 2. Click in the body of the email message where you want the picture to go.**
- 3. Click the Pictures button.**

You see the Insert Picture dialog box. If the Pictures button is grayed out and you can't click it, go to the Format Text tab and click the Aa HTML button. Choosing Aa HTML as the format for email messages enables you to send photos in the body of email messages.

- 4. Locate and select the digital picture you want to send; then click the Insert button.**

The picture lands in the Message window. Book 8, Chapter 3 explains how to manipulate graphic images in Outlook and the other Office applications.

Want to remove a picture from an email message? Select it and press the Delete key.

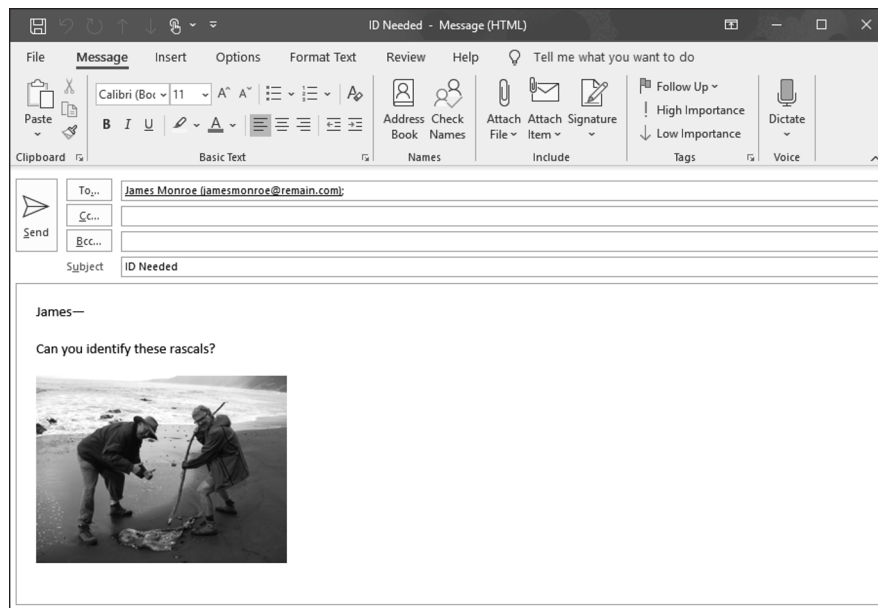


FIGURE 3-3:
Inserting a
photo in an
email message.

Receiving Email Messages

I hope that all the email messages you receive carry good news. These pages explain how to collect your email and all the different ways that Outlook notifies you when email has arrived. You can find several tried-and-true techniques for reading email 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 email

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

- » **Collect all email:** Click the Send/Receive All Folders button (or press F9). Mail is sent from and delivered to all your email 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 email 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 email account.

Being notified that email has arrived

Take the email arrival quiz. Winners get the displeasure of knowing that they understand far more than is healthy about Outlook. You can tell when email has arrived in the Inbox folder because

- A) You hear this sound: *ding*.
- B) The mouse cursor briefly changes to a little envelope.
- C) A little envelope appears in the notification area to the left of the Windows clock. (You can double-click the envelope to open the Inbox folder.)
- D) A pop-up *desktop alert* with the sender's name, the message's subject, and the text of the message appears briefly on your desktop.
- E) All of the above.

The answer is E, "All of the above," but if four arrival notices strike you as excessive, you can eliminate one or two. On the File tab, choose Options, and in the Mail category of the Options dialog box, go the Message Arrival area and change the settings.

Reading Your Email in the Inbox Window

Messages arrive in the Inbox window, as shown in Figure 3-4. You can tell a thing or two about messages by glancing in the window:

- » Unread messages are shown in boldface type.
- » Messages that you've read (or at least opened to view) are shown in Roman type.
- » In the Folder pane, a number beside a folder tells you how many unread messages are in those folders. (The number in square brackets beside the Drafts and Junk Email 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 3-4.

Reading pane

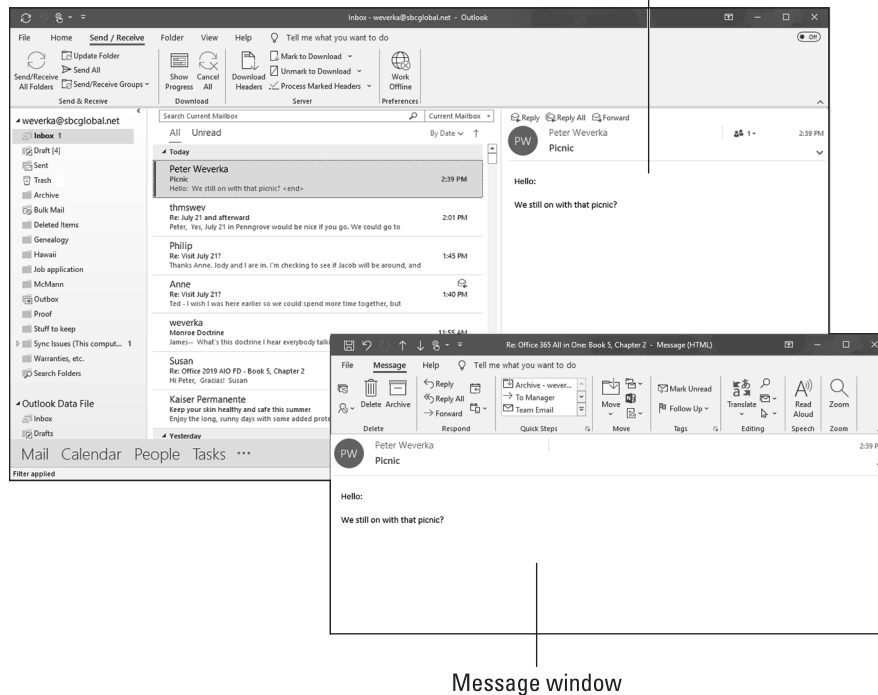


FIGURE 3-4: Reading a message in the Reading pane and Message window.

Later in this chapter, “Techniques for Organizing Email Messages” explains how to organize messages in the Inbox folder. Meanwhile, here are some simple techniques you can use on the View tab to unclutter the Inbox folder and make messages easier to read:

- » **Changing your view of messages:** Click the Change View button and choose Compact, Single, or Preview on the drop-down list. Compact and Single display more messages onscreen. In Preview view, the first two lines of unread messages appear so that you can read them.
- » **Rearranging messages:** In the Arrangement gallery, choose an option. For example, choose Date to arrange messages according to the date and time they were received. Choose From to arrange messages by sender name in alphabetical order. Click the Reverse Sort button to reverse the way the messages are arranged.
- » **Hiding and displaying the Reading pane:** Click the Reading Pane button and choose Off, Right, or Bottom on the drop-down list to make the Reading pane appear or disappear. The Reading pane gives you an opportunity to read messages without opening them in a Message window.

The Reading pane offers a Reply, Reply All, and Forward button for quickly replying to and forwarding email messages.

» **Hiding and displaying the Folder pane:** Click the Folder Pane button and choose Normal or Minimized (or press Alt+F1 or click the Minimize the Folder Pane button on the Folder pane itself). By hiding the Folder pane, you get even more room to display messages.



TIP

Suppose you open an email message but regret doing so because you want the boldface text to appear on the message's name. In other words, you want to handle the message later on. To make a message 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 email message because the paper clip icon appears in the Attachment column of the Inbox window (if column headings are displayed). Moreover, the name of the file or files appears in the Reading pane (if the Reading pane is open). When you double-click to open the message in a window, the names of files sent to you appear across the top of the message window, as shown in Figure 3-5.

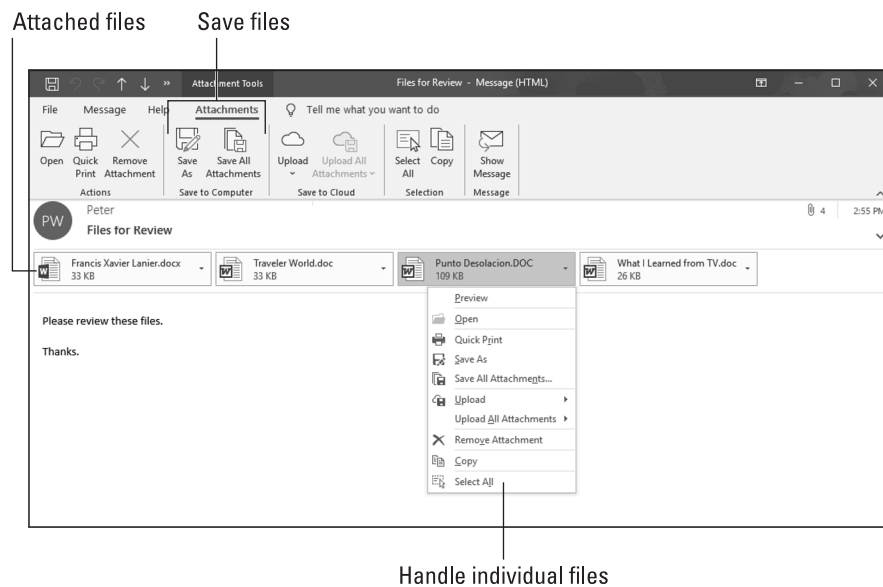


FIGURE 3-5: Receiving a file.

Handle individual files

Opening a file you received

Follow these instructions 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.
- » Open the drop-down list on the filename and choose Open on the shortcut menu (refer to Figure 3-5).



TIP

As long as the file being sent to you is a Word, PowerPoint, Excel, or Publisher file, you can preview it inside the Message window or Reading pane. To do so, click the filename (or choose Preview on the file's drop-down list). Click Back to Message to see the message again, not the file preview.

Saving a file you received

Follow these instructions to save a file that was sent to you in a folder of your choice:

- » 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.
- » Open the filename's drop-down list (refer to Figure 3-5), choose Save As, and save the file in the Save Attachment dialog box. Choose Save All Attachments to save more than one file.

Techniques for Organizing Email Messages

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

In a nutshell, here are all the techniques for organizing email 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 Email 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 email message about a project arrives, move it to a folder. See “All about Email 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 Outlook to move messages automatically to different folders. See “Rules for earmarking messages as they arrive,” later in this chapter.
- » **Delete junk mail as it arrives:** You can delete junk mail automatically. See “Yes, You Can Prevent Junk Mail (Sort of),” later in this chapter.
- » **Ignore messages from pesky senders:** On the Home tab, select a message and click the Ignore button to prevent messages from a sender from appearing in the Inbox. Ignored messages go straight to the Deleted Items folder.
- » **Flag messages:** Flag a message with a color-coded flag to let you know to follow up on it. See “Flagging email messages,” the next section in this chapter.
- » **Categorize messages:** Assign email messages to categories; then, arrange email messages by category in the Inbox window. See Chapter 1 of this minibook for info about categorizing items in a folder.
- » **Make liberal use of the Search commands:** You can always find a stray message with the Search commands. (See Chapter 1 of this minibook to know more about searching for items in folders.)
- » **Archive messages you no longer need:** Archiving is a good way to strip the Inbox folder of items that you don’t need. See Chapter 1 of this minibook for more about archiving.
- » **Use the Mailbox Cleanup command:** This handy command archives messages, deletes them, and deletes alternative versions of messages. See Chapter 1 of this minibook for more about the Mailbox Cleanup command.

Flagging email messages

One way to call attention to email messages is to flag them. Flag a message, for example, to mark it as urgent. After you flag a message, you can arrange messages by their flag status in the Inbox folder. Follow these instructions to flag an email message:

- » **Starting in the Message window:** Click the Follow Up button and choose Flag Message on the drop-down list, as shown in Figure 3-6.
- » **Starting in the Inbox folder:** Select the message, and on the Home tab, click the Follow Up button and choose a flag. You can also right-click, choose Follow Up, and choose a flag.

Click Follow Up to flag a message

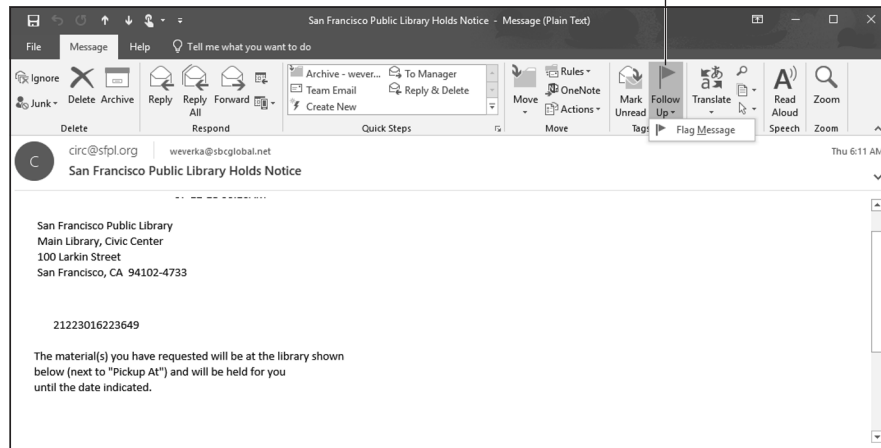


FIGURE 3-6:
Flagging a message in the Message window.

To “unflag” a message, click the Follow Up button and choose Clear Flag, or right-click and choose Clear Flag. Later in this chapter, “Rules for earmarking messages as they arrive” explains how you can flag messages automatically as they arrive.

Rules for earmarking messages as they arrive

To help you organize messages better, Outlook gives you the opportunity to earmark messages in various ways and even move messages as they arrive automatically to folders apart from the Inbox folder. Being able to move messages

immediately to a folder is a great way to keep email concerning different projects separate. If you belong to a newsgroup that sends many messages per day, being able to move those messages instantly into their own folder is a real blessing because newsgroup messages have a habit of cluttering the Inbox folder.

To earmark messages for special treatment, Outlook has you create so-called rules. You can create a rule to

- » Move email from a particular person automatically to a folder.
- » Be alerted when email arrives from a certain person or the Subject line of a message includes a certain word. As shown in Figure 3-7, a New Item Alerts message appears in the lower-right corner of your screen to alert you.

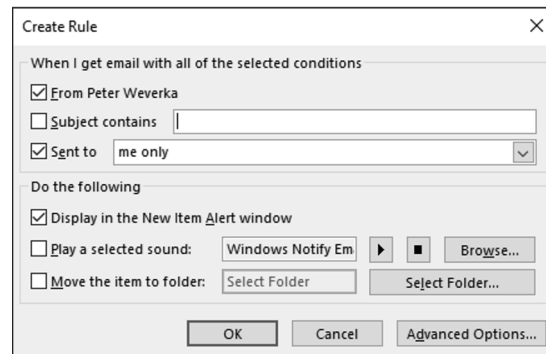
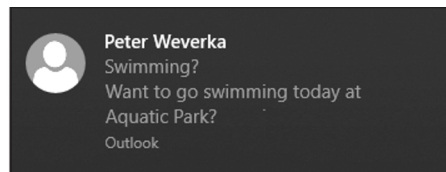


FIGURE 3-7:
A New Item Alerts
message (top)
and the Create
Rule dialog box
(bottom).

Follow these instructions to create a rule so that incoming email messages are given special treatment:

- 1. Select an email message from a person whose messages require a rule.**
You can skip this step if your goal is to create a rule for messages that contain a certain word in the Subject line.
- 2. On the Home tab, click the Rules button.**

3. Choose an option on the drop-down list.

Choose an option to move messages to a folder or be alerted about messages.

- **Automatically move messages from this person to a folder:** Choose Always Move Messages From, and in the Rules and Alerts dialog box, select a folder. (Later in this chapter, “Creating a new folder for storing email” explains how to create a folder of your own.)
- **Be alerted about messages:** Choose Create Rule. You see the Create Rule dialog box shown in Figure 3-7. Fill in the dialog box and click OK.



TIP

To change or delete a rule, go to the Home tab, click the Rules button, and choose Manage Rules & Alerts. On the Email Rules tab of the Rules and Alerts dialog box, select a rule and change, copy, or delete it.

All about Email Folders

Where Outlook email is concerned, everything has its place and everything has its folder. Email messages land in the Inbox folder when they arrive. Messages you write go to the Outbox folder until you send them. Copies of email messages you send are kept in the Sent Items folder. And you can create folders of your own for storing email.

If you're one of those unlucky people who receive numerous email messages each day, you owe it to yourself to create folders in which to organize email messages. Create one folder for each project you're working on. That way, you know where to find email messages when you want to reply to or delete them. These pages explain how to move email messages between folders and create folders of your own for storing email.

Moving email messages to different folders

Open or select the message you want to move and use one of these techniques to move an email message to a different folder:

- » On the Home tab or a Message window, click the Move button and choose a folder name on the drop-down list. If the folder's name isn't on the list, choose Other Folder and select a folder in the Move Item To dialog box.
- » Right-click, choose Move, and select a folder name or choose Other Folder and select a folder in the Move Item To dialog box.

- » Display the folder you want to receive the message in the Folder pane. Then drag the message from the Inbox to the folder in the Folder pane.

Earlier in this chapter, “Rules for earmarking messages as they arrive” explains how to move email messages automatically to folders as email is sent to you.

Creating a new folder for storing email

Follow these steps to create a new folder:

1. On the Folder tab, click the New Folder button.

You see the Create New Folder dialog box, as shown in Figure 3-8. You can also open this dialog box by pressing Ctrl+Shift+E or right-clicking a folder in the Folder list and choosing New Folder.

2. Select the folder that the new folder will go inside.

To create a first-level folder, select the name of the topmost folder in the hierarchy.

3. Enter a name for the folder.

4. Click OK.

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.

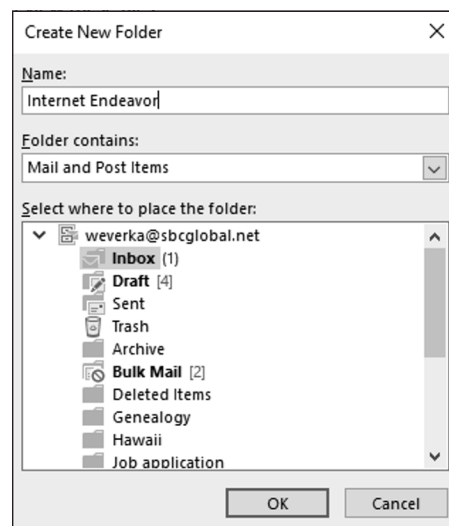


FIGURE 3-8:
Creating a new
folder.

Yes, You Can Prevent Junk Mail (Sort of)

Outlook maintains a folder called Junk Email especially for storing junk email, or *spam* as the digital variety is sometimes called. Email 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 email 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 email!

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

Defining what constitutes junk email

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

- » **Add a sender to the Safe Senders list:** Senders on this list are deemed legitimate, and their email messages are always routed to the Inbox folder. In the Message window or Home tab of a mail folder, click the Junk button and choose Never Block Sender. Choose this option if you find a legitimate email message in the Junk E-mail folder.
- » **Add an address to the Blocked Senders list:** Email from senders on the Blocked Senders list goes straight to the Junk E-mail folder. In the Message window or Home tab of a mail folder, click the Junk button and choose Block Sender.
- » **Editing the Safe Senders and Blocked Senders lists:** Click the Junk button and choose Junk E-mail Options. The Junk E-mail Options dialog box opens. On the Safe Senders and Blocked Senders tab, select email addresses as necessary and click the Remove button.

To quickly move an email message from the Junk E-mail folder to the Inbox folder, click the Junk button and choose Not Junk on the drop-down list. The Mark As Not Junk dialog box appears. Click the Always Trust E-mail From check box and click OK.

Preventative medicine for junk email



TIP

As zealous as Outlook is about preventing junk email, the program can't really do the job. Junk emailers change addresses frequently. They are clever about putting words in the subject lines of their messages so that the messages aren't recognized as spam. The only foolproof way to keep your email address free of junk email is to follow these suggestions:

- » **Use a secondary email address:** Create a secondary email account and give its email address to businesses and merchants on the Internet who might sell your address to spammers or might themselves be spammers. The Internet offers many places to create free web-based email accounts. For example, check out Gmail (<http://gmail.google.com>) and Yahoo Mail (<http://mail.yahoo.com>). Never give your primary email address to strangers.
- » **Don't reply to spam:** Don't reply to junk email messages under any circumstances. By replying, all you do is alert the spammer to the fact that your email address is legitimate, and that makes you a target of even more spam.
- » **Don't unsubscribe to junk email messages:** Some spam messages contain an Unsubscribe link that you can click to prevent more messages from coming. The links are a ruse. All you do by clicking them is make spammers aware that your email address is live and therefore worth targeting with more spam.
- » **Don't buy anything advertised by spam:** Even if the message is selling what looks to be a terrific bargain, resist the temptation. By buying, you expose yourself to all the risks of replying to junk email.
- » **Be careful where (and how) you post your email address:** Spammers gather email addresses from the Internet. They get the addresses from web pages, newsgroups, chat rooms, and message boards. Harvestware, a variety of spamware, can scour the Internet for the telltale "at" symbol (@) found in email addresses and copy those addresses back to a spammer's computer. If you have to post your email address on the Internet, get around the problem by putting blank spaces between the letters in your address, or spell out the address like so:

johndoe at earthlink dot net

IN THIS CHAPTER

- » Understanding how the Calendar works
- » Scheduling (and rescheduling) appointments and events
- » Getting different views of your schedule
- » Scheduling and managing meetings with coworkers

Chapter 4

Managing Your Time and 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, look at your schedule in different ways, and schedule and handle meetings with coworkers.

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 workweek of February 11–February 15 (a workweek 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. When someone invites you to a meeting or wants to schedule an appointment, you can open the Calendar and see right away whether your schedule permits you to attend the meeting or make the appointment.

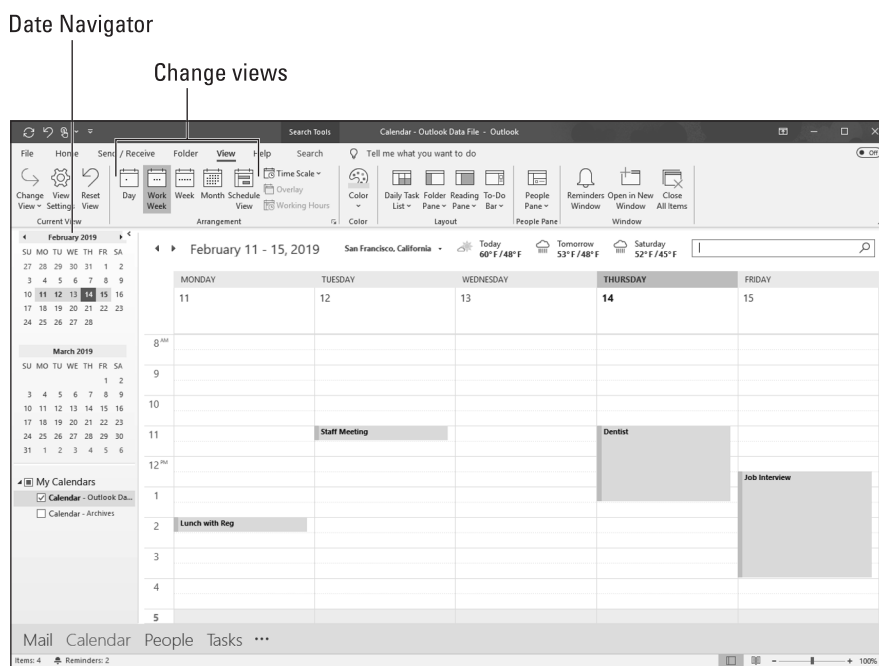


FIGURE 4-1:
The Calendar in
Work Week view.

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.

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

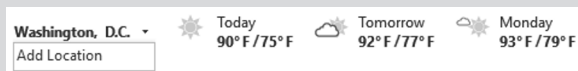
meetings. But if your computer isn't on a network, don't bother with meetings. Schedule appointments and events instead. You can schedule the following activities:

- » **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 coldhearted or unromantic.
- » **Meeting:** Same as an appointment except that you can invite others to attend. To schedule meetings, the company you work for must subscribe to Exchange Online, an Office 365 service whereby people who work together can view one another's calendars and find the best time to have meetings. See "Managing Meetings with the Calendar" later in this chapter.

HOW'S THE WEATHER?

The Calendar window gives a weather report with temperature readings or projections for today, tomorrow, and the day after that.

To get temperature readings for your hometown, click the down-arrow to open the Add Location box. Then enter the name of your town or your town's ZIP code.



Seeing Your Schedule

Days on which meetings or appointments are scheduled appear in boldface in the Date Navigator, the calendar located in the Folder pane (refer to Figure 4-1). Following are techniques for getting around in the Calendar window and viewing your schedule in different ways.

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 (located on the Folder pane). 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 Folder Pane button, and choose Normal 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, Work Week, and Week view. In Month view, manipulating the scroll bar takes you from month to month.

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 (press Ctrl+Alt+1).
- » **Work Week:** Shows Monday through Friday of this week (press Ctrl+Alt+2).

» **Week:** Shows the entire week, Sunday through Saturday (press Ctrl+Alt+3).

» **Month:** Shows the entire month (press Ctrl+Alt+4).



TIP

What constitutes a workweek and which day is the first day of the week differs from place to place. If the Calendar doesn't conform to your notions of what a week is, go to the File tab and choose Options. Then, in the Outlook Options dialog box, go to the Calendar category and choose different Work Time options.

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 email 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.

If the activity occupies a certain time period, you can select the time period in Day, Work Week, 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, simply double-click a half-hour slot in Day, Work Week, or Week view. The Appointment dialog box opens with the Start and End time entered already.

2. On the Home tab, click the New Appointment button (or press Ctrl+N).

As shown in Figure 4-2, you see the Appointment window for naming the activity, stating its starting and ending time, and choosing whether you want to be alerted to its occurrence. In a folder apart from the Calendar, you can display this window by going to the Home tab, clicking the New Items button, and choosing Appointment on the drop-down list.

3. Enter information in the Appointment tab.

Enter a subject, location (you can open the drop-down list and choose one you've entered before), start date and time, and end date and time. To enter a recurring event or appointment, click the Recurrence button. To enter an event instead of an appointment, click the All Day Event check box.



TIP

4. **Open the Reminder drop-down list (located in the Options group) and choose an option if you want to be reminded when the activity is imminent (or choose None if you don't care to be reminded).**

Choose an option from the drop-down list to make the Reminder message box appear before the activity begins. Chapter 5 of this minibook explains how reminders work.

5. **Click the Save & Close button when you finish describing the appointment or event.**

The appointment or event is entered in the Calendar window.

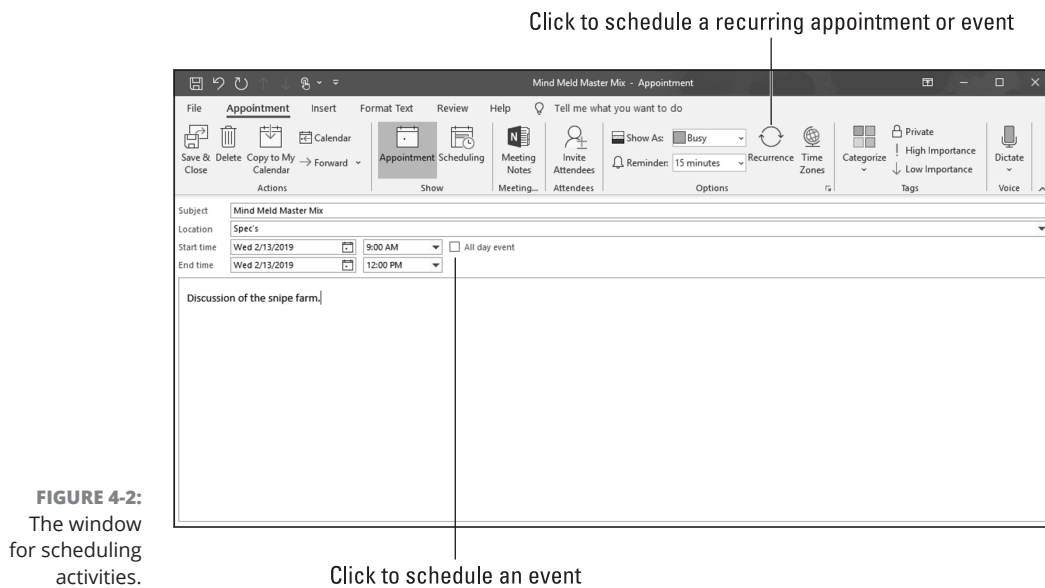


FIGURE 4-2:
The window
for scheduling
activities.

Scheduling a recurring appointment or event

To enter a recurring appointment or event, click the Recurrence button in the Appointment window (refer to Figure 4-2). You see the Appointment Recurrence dialog box, as shown in Figure 4-3. Describe how persistent the activity is and click OK:

- » **Appointment Time:** Enter the starting and ending time, if you didn't do so already in the Appointment form.
- » **Recurrence Pattern:** Use the options and drop-down lists to describe how often the activity recurs.

» **Range of Recurrence:** Describe when the recurring events will cease recurring. Choose the No End Date option button if the activity occurs *ad infinitum, ad nauseum* (that's Latin for "unto infinity, most nauseously").

In the Calendar window, recurring activities are marked by the arrow chasing its tail icon.

FIGURE 4-3:
My, this appointment is persistent!

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.

USING AN EMAIL MESSAGE TO SCHEDULE AN APPOINTMENT

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

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 to 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 time slot.
- » **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.

Managing Meetings with the Calendar

As mentioned earlier in this chapter, a meeting is similar to an appointment, but meetings are scheduled by way of Exchange Online, an Office 365 service designed for people who work for the same company. One of the lovely attributes of Exchange Online is that coworkers can see one another's calendars. In so doing, they can tell when coworkers have free time to attend a meeting and can schedule meetings accordingly.

These pages explain how to schedule and invite coworkers to meetings, accept or decline a meeting invitation, and reschedule or cancel a meeting.

Scheduling and inviting coworkers to a meeting

Schedule and invite coworkers to meetings starting in the Inbox folder by sending them an email message:

PERMITTING (OR NOT PERMITTING) COWORKERS TO SEE YOUR APPOINTMENTS AND MEETINGS

In the interest of privacy, you can decide for yourself whether coworkers can see appointments and meetings that are scheduled on your calendar. Follow these steps to make an appointment or meeting invisible to coworkers:

- 1. Find the appointment or meeting on the Calendar that you want to make invisible to others.**
- 2. Right-click the appointment and select Private on the drop-down list.**

Appointments and meetings marked as private on your Calendar appear to others as blocked-out time. Your coworkers can't schedule a meeting with you during blocked-out time intervals.

- 1. On the Home tab, click the New Items button and choose Meeting on the drop-down menu.**

A message window opens.

- 2. Address the email message to coworkers you want to invite to the meeting.**
- 3. Enter a meeting name in the Subject field.**
- 4. Enter a preferred Start Time and End Time for the meeting.**
- 5. On the Meeting tab, click the Scheduling Assistant button.**

This button is located in the Show group. The Scheduling Assistant window opens, as shown in Figure 4-4. This window lists coworkers you invited to the meeting; it shows whether their schedules conflict with the meeting time you proposed.

If all is well and there are no scheduling conflicts, skip to Step 7. Otherwise, read on.

- 6. Use the hourly calendar view to select a time block that is available to all parties.**

Use your mouse to drag and drop a time range. If you make a mistake, click outside your selected area and start over.

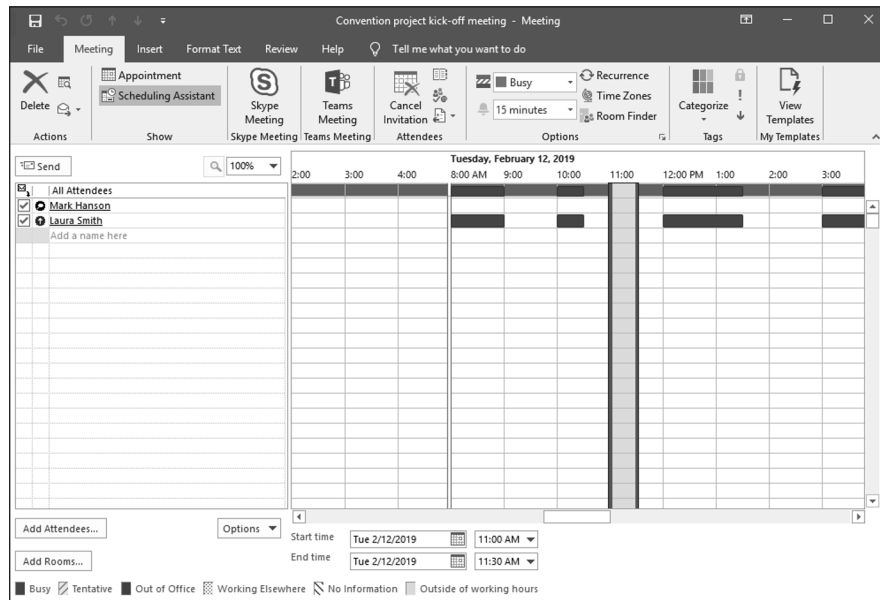


FIGURE 4-4:
The Scheduling Assistant window shows whether a time slot is available for a meeting.

7. Click the Appointment button to return to the message window.
8. If your company registers rooms with Exchange Online, enter the name of the room where you want to hold the meeting in the Location box.

You can also click the Rooms button to open a list of rooms and select a name there.

9. Click Send.

If you didn't enter or choose a location for the meeting, Outlook asks whether you want to send the invitation without saying where the meeting is to be held. Click Send to proceed.

The meeting organizer can track all attendees' responses by opening the meeting in their Calendar, going to the Meeting tab, and clicking the Tracking button. The organizer can see at a glance which recipients responded to the meeting request and how they replied to the meeting invitation.

Accepting (or declining) meeting invitations

Meeting invitations arrive by email. Follow these steps to accept or decline a coworker's meeting invitation:

1. Open the email message.

As shown in Figure 4-5, the invitation comes with options for accepting, tentatively accepting, and declining the invitation. Choosing Tentative tells your coworker you aren't sure whether you can make it to the meeting.

Accept or decline the meeting

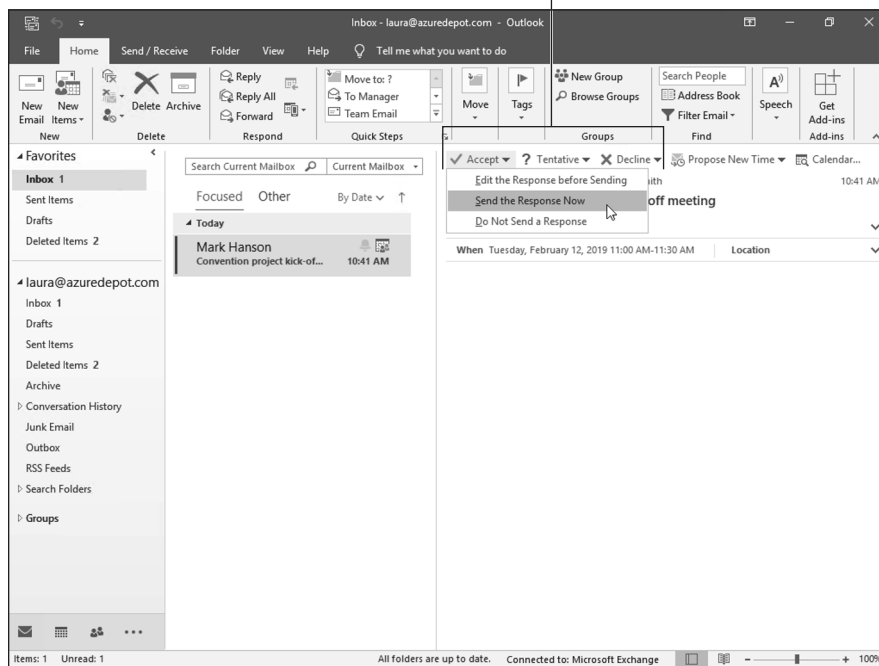


FIGURE 4-5: Choose an option to reply to a meeting invitation.

2. Click Accept, Tentative, or Decline.

3. On the drop-down list that appears, choose how to respond to the invitation.

As Figure 4-5 shows, you can edit your response, send the response straightaway, or elect not to respond to the invitation by email. As soon as you make your choice, a notification is sent to the meeting organizer.



TIP

Click the Propose New Time button in the Invitation window (refer to Figure 4-5) if you want to propose a different time for the meeting. Clicking this button opens the Scheduling Assistant so that you can propose a different time to the meeting organizer.

Canceling and rescheduling meetings

The person who proposed a meeting can cancel it by following these steps:

- 1. In the Outlook Calendar, double-click the meeting that needs canceling or rescheduling.**

The Meeting window opens.

- 2. On the Meeting tab, click Cancel Meeting.**

- 3. Click Send Cancellation.**

The meeting is removed from invitees' calendars.

To reschedule a meeting, open the meeting request and start the Scheduling Assistant. After you've proposed a new date and time for the meeting, click Send Update to send the modified meeting request to coworkers.

IN THIS CHAPTER

- » Creating, handling, and managing tasks
- » Being reminded when deadlines and activities are forthcoming
- » Jotting down digital notes

Chapter 5

Tasks, Reminders, and Notes

This short chapter describes some Outlook goodies that were neglected in the other chapters of this minibook. 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 email message needs a reply, or someone in your Contacts folder needs love and attention. Finally, it explains 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.

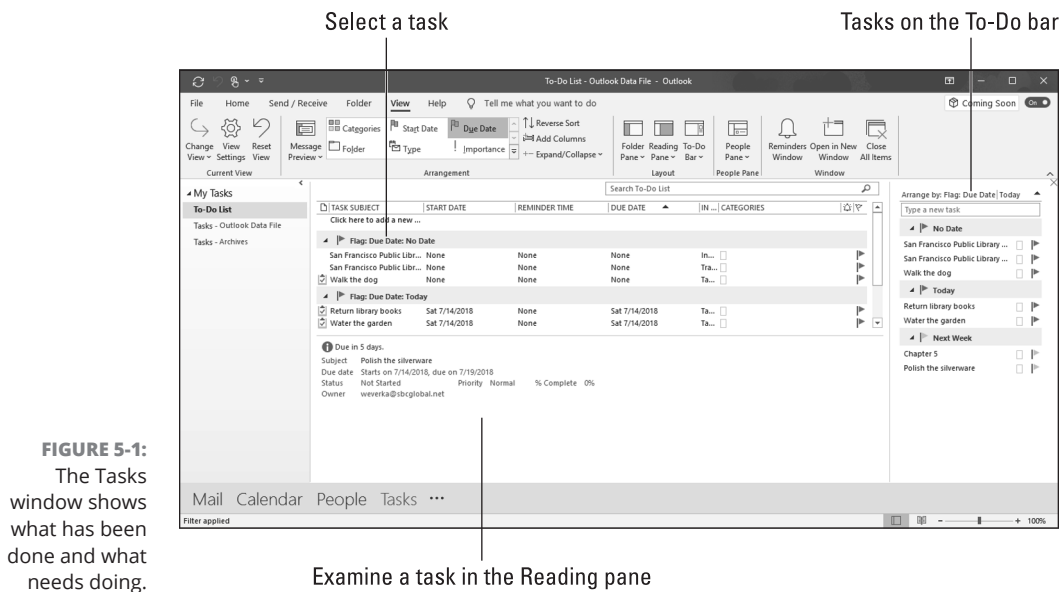


FIGURE 5-1:
The Tasks window shows what has been done and what needs doing.



TIP

The best way to examine tasks is to display the Reading pane. This way, you can select a task and read notes you've made about it, as shown in Figure 5-1. To display the Reading pane, go to the View tab, click the Reading Pane button, and choose Right or Bottom on the drop-down list.

Entering a task in the Tasks window

Outlook offers two ways to enter a task in the Tasks window:

- » **The fast way:** Click at the top of the window where it says "Type a new Task," type a few words to describe the task, and press the Enter key. Outlook makes the current date the task's start and end date.
- » **The slow but thorough way:** On the Home tab, click the New Task button (or press Ctrl+N). You see the Task window, as shown in Figure 5-2. In this window are places for describing the task, entering start and due dates, describing the task's status, prioritizing the task, and jotting down notes about it. Click the Save & Close button when you finish describing the task.

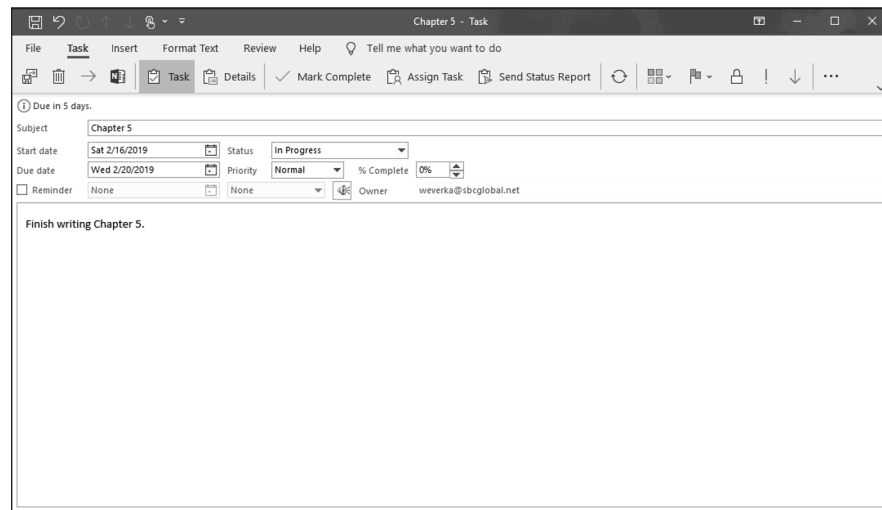


FIGURE 5-2:
Describing a task.

By clicking the Recurrence button in the Task window, you can enter a Sisyphean task that gets repeated over and over again. In the Task Recurrence dialog box, describe how often the task recurs. Recurring tasks are marked in the Tasks window with a special recurring icon.

Click the Details button in the Task window to track the hours you worked on a project, the companies you worked for, and how many miles you logged going to and fro in your work.

ATTACHING A FILE TO A TASK

Attaching a file to a task is a neat way to get down to work quickly. Instead of fumbling in your computer for a Word document, Excel worksheet, or other type of file to work on, you can open it merely by double-clicking its name in the Tasks window or Reading pane of the Tasks window. To attach a file to a task:

- Go to the Insert tab in the Task window and click the Attach File button. Then, either select a file on the drop-down list or choose Browse This PC and select a file in the Insert File dialog box.
- Drag and drop a file to the Task 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 Folder pane.** Under My Tasks at the top of the Folder pane, choose To-Do List to examine all tasks, including those you fashioned from email 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, click the Arrange By button and choose an option on the drop-down list to arrange tasks by Categories, Start Date, Due Date, or one of the other options.
- » **Change views.** On the 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.



TIP

To display tasks on the To-Do bar (refer to Figure 5-1), go to the View tab, click the Layout button, and choose Tasks. 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:** Right-click a task and choose Mark Complete. Outlook draws a line through completed tasks.
- » **Deleting a task:** Select the task and click the Delete button (it's on the Home tab) 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 minibook), when a task deadline is looming (see the preceding topic in this chapter), when

an email message needs a reply (see Chapter 3 of this minibook), or when someone whose name is in your Contacts folder needs attention (see Chapter 2 of this minibook).

Figure 5-3 shows the Reminder message box. When Outlook is running and you least expect it, a Reminder message box similar to the one in the figure may appear to keep you on your toes. These pages explain how to handle reminder messages, schedule messages, and make the messages appear when you want them to appear.

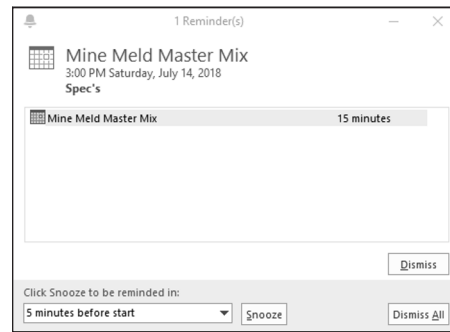


FIGURE 5-3:
The Reminder message box.

Handling reminder messages

Select a reminder in the Reminder message box and do the following to handle a reminder:

- » **Dismiss it.** Click the Dismiss button to shelve the reminder notice. If more than one notice appears in the Reminder message box and you want to erase them all, click the Dismiss All button.
- » **Be reminded later.** Click the Snooze button. At the bottom of the dialog box, the Click Snooze to Be Reminded Again In text box tells you when the next reminder message will arrive. To change this setting, open the drop-down list and choose a different time period.
- » **Open the item.** Double-click the reminder to examine the appointment, task, email message, or contact to which the reminder pertains.
- » **Procrastinate.** Click the Close button (the X) in the Reminder message box to make it disappear. To open the message box later, go to the View tab, click the More Commands button (the three dots on the right side of the Ribbon), and choose the Reminders Window on the drop-down list.



Reminders work only for items that are stored in these folders: Tasks, Calendar, Inbox, and Contacts. Store an item in another folder or a subfolder of one of the folders I just named, and you won't see the Reminder message box when the reminder is due. To make sure you get reminded, store items in these folders: Tasks, Calendar, Inbox, or Contacts.

Scheduling a reminder message

Follow these instructions to schedule a reminder message:

- » **Calendar appointment or event:** In the Appointment window, open the Reminder drop-down list and choose how many minutes, hours, or weeks in advance of the appointment or event to make the reminder appear.
- » **Task deadline:** In the Task window (refer to Figure 5-2), select the Reminder check box and choose a day and time to be reminded in the drop-down menus.
- » **Contacts name:** Select a contact in the Contacts window, click the Follow Up button, and choose Add Reminder on the drop-down list. The Custom dialog box opens. Treat this dialog box the same way you treat the one for email messages (see the preceding item in this list).

Making reminders work your way

You can do two or three things to make reminders work your way. On the File tab, choose Options to open the Options dialog box. Then follow these instructions to have your way with reminder notices:

- » **Changing the reminder time for appointments and events:** By default, the Reminder message box appears 15 minutes before appointments and events start. To change this setting, go to the Calendar category and enter a new setting in the Default Reminders drop-down list (look under "Calendar Options").
- » **Changing the default time for task reminders:** When a task's deadline arrives, the Reminders dialog box lets you know at 8:00 a.m. (or when you start Outlook, if you start the application after 8:00 a.m.). To change this default setting, go to the Tasks category and choose a new time from the Default Reminder Time drop-down list.
- » **Playing a different sound (or no sound):** By default, you hear a little chime when the Reminder message box appears onscreen. To hear a different sound or no sound at all, go to the Advanced category of the Options dialog box. To play no sound, deselect the Play Reminder Sound check box. To play a different sound, click the Browse button and then select a .wav sound file in the Reminder Sound File dialog box.

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 (you likely have to click the three dots on the Navigation pane to see the Notes button). 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:

- » **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 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 email 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, press the Delete key, or right-click and choose Delete.

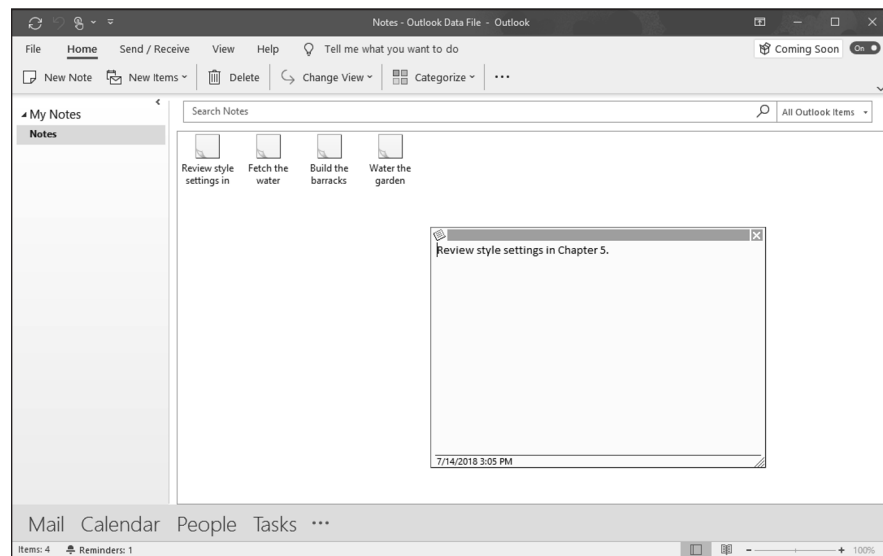


FIGURE 5-4: Notes, notes, and more notes.

