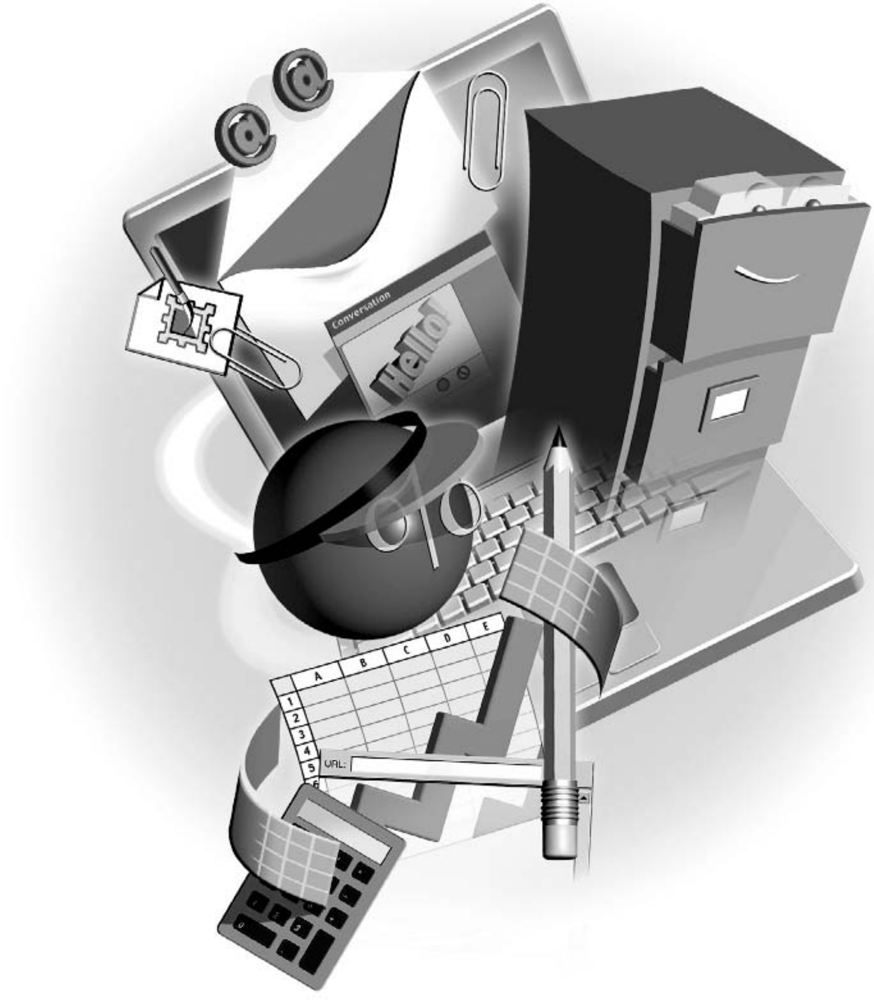
Part VI

Keeping in Touch and on Schedule with Outlook



Chapter 22

Communicating with Email

How to…

- Set up your email accounts
- Address, compose, and send a message
- Reply to incoming mail
- Forward messages to others
- Set up an email signature
- Organize stored messages in folders

Outlook is an application that does many things—it allows you to send and receive email messages, track your schedule through a calendar, maintain to-do lists, store names and addresses, and even keep a journal. In this chapter, you'll learn all about email, from setting it up to making use of both its everyday features and its most powerful ones.

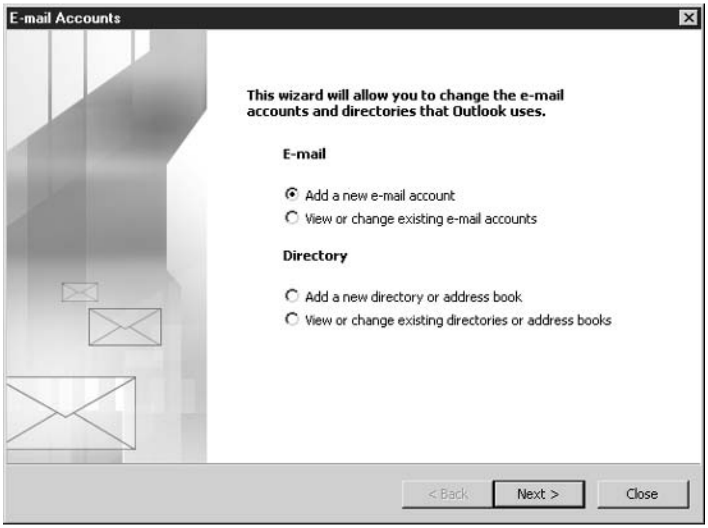
About Email Accounts

Unlike the rest of the applications in the Office suite, which function "as is" and don't require any setup from you, Outlook needs to know some basic information about your email accounts before it can go to work for you. Specifically, Outlook requires your account name, password, and the name of the email server(s) that receives and stores your incoming and outgoing mail. You can get this information from your network administrator or Internet service provider (ISP), who will typically supply you with the following:

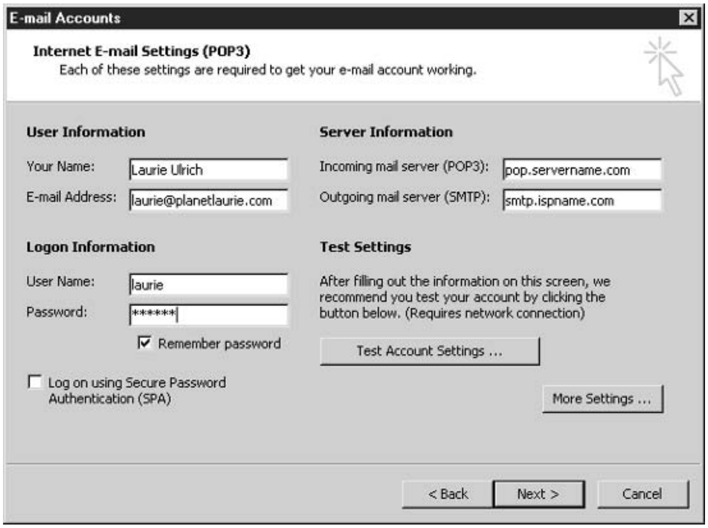
- The type of account (Exchange Server, POP3, IMAP, HTTP, or other)
- Name of your incoming server and outgoing server
- Your email address, username, and password

To add an email account to Outlook, do the following:

1. Open Outlook.
2. From the menu bar, select Tools | Email Accounts to open the Email Accounts Wizard.
3. In the first dialog box, click the Add a New Email Account radio button and then click Next.



4. Select your account's email server type from the choices provided—Microsoft Exchange Server, POP3, IMAP, HTTP, or Additional Server Types. The server type for your account is identical to the type of account you have. If you have a POP3 account, you're using a POP3 server. Click Next.
5. Enter the account information provided by your ISP or system administrator, as shown next. Unless otherwise instructed by your ISP or system administrator, all server and address information should be entered in lowercase. Some ISPs may use a combination of uppercase and lowercase letters in passwords to add additional security. Click Next to continue to the last panel. Then click Finish.



TIP

To make sure your settings and entries are all correct, click the Test Account Settings button. Outlook will (assuming you're online) connect to the designated email servers, sending and receiving messages with the information you provided. If any portion of the process fails (you'll see each step tried, and it will either succeed or fail), you can make changes and retest.

Touring the Outlook Interface

Like the rest of the Office suite, Outlook relies on a basic set of simple tools to accomplish its tasks so you don't need to learn an entire new application from the ground up. The Outlook application window is divided into five main sections—three message panes, one set of toolbars and menus, and a Navigation pane that contains a series of buttons for switching between Outlook's major components. Figure 22-1 shows the Outlook window in its default condition, with Mail selected, the Inbox active, and a message being viewed in the Reading pane.

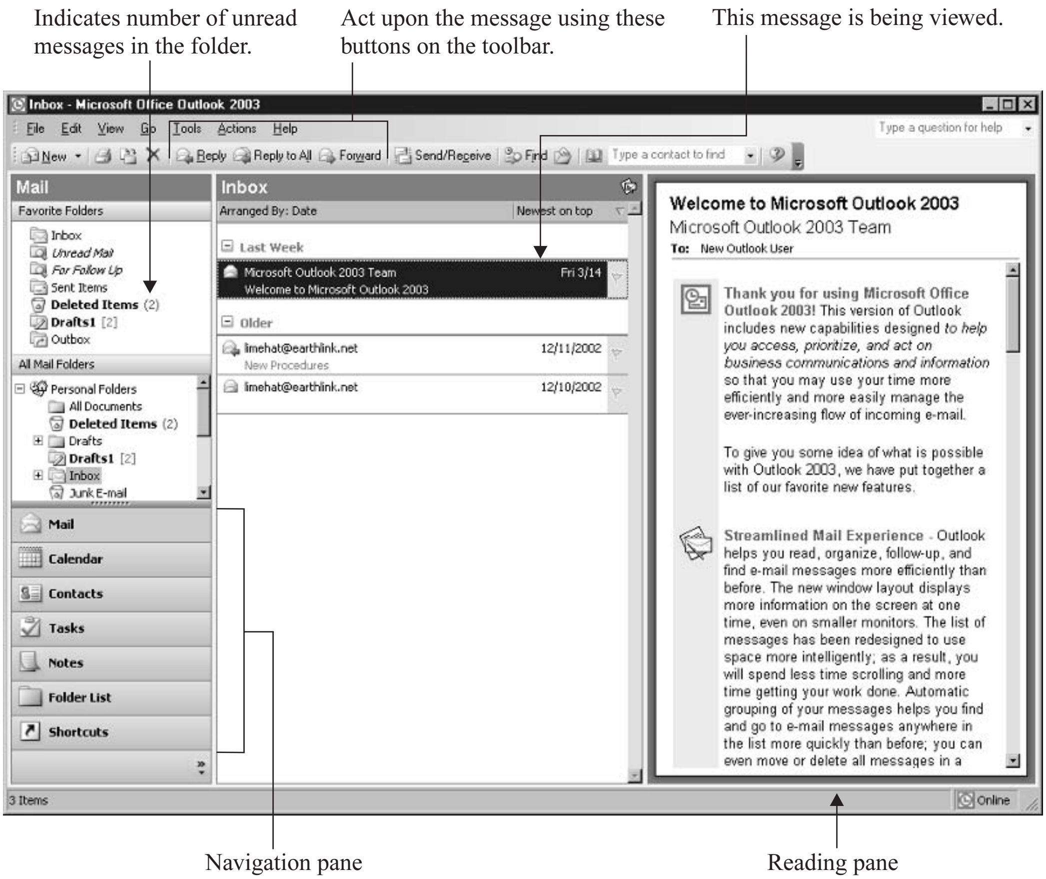


FIGURE 22-1 Outlook's tools and onscreen features are unique, but logically placed and easily identified.

You can customize the appearance and placement of the panes within the Outlook window by resizing them (point to their borders and drag your two-headed mouse pointer, shown in Figure 22-2) or by choosing where and how the Reading pane will appear. The View | Reading Pane menu offers options for Right, Bottom, and Off.

Working with Messages

Given that sending and receiving email is Outlook's primary function, let's get started with the process of creating an outgoing message. After all, other than the "spam" (junk email) that everyone gets whether they want it or not, you have to send a message in order to get a reply.

Composing an email message is very simple. With the Mail view displayed (click the Mail button in the Outlook Navigation pane), click the New button on the toolbar. Because you're in Mail, the New button automatically gives you a new message window—if you were in Calendar, the New button would be used to create a new appointment, as you'll discover in Chapter 23. In

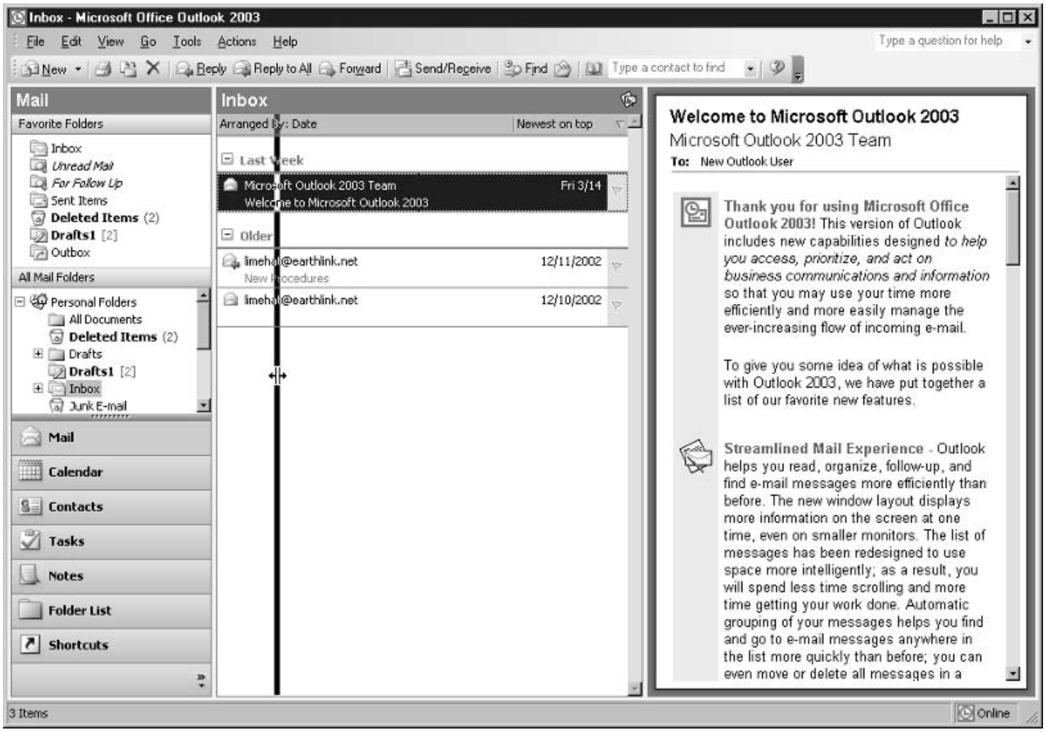


FIGURE 22-2 Want to see more of this and less of that? Resize the panes to suit your needs.

the new Untitled Message window shown in Figure 22-3, you can see that the basic tools for addressing and composing your message are right there, all within a very familiar-looking window. You'll recognize several of the formatting tools from Word on the Formatting toolbar, and on the Outlook toolbar, you'll find a small group of easily learned and remembered buttons for utilizing various email-handling tools.

Because your cursor is already in the To box, either type the recipients' addresses (if you know them) or click the To button (the word "To…" is a button) to access your Address Book. You'll only have Address Book entries if you imported them from whatever email program you were using previously, or if you've added entries to it manually. If you have no entries, you can learn to build them in Chapter 24. For now, just type the address of each recipient of the new message. If you will be sending to more than one person, use a semicolon to separate the addresses.

If you want to send a copy of your message to one or more people, use the Cc… box. You can click the Cc… button to access the Address Book (with the aforementioned considerations),

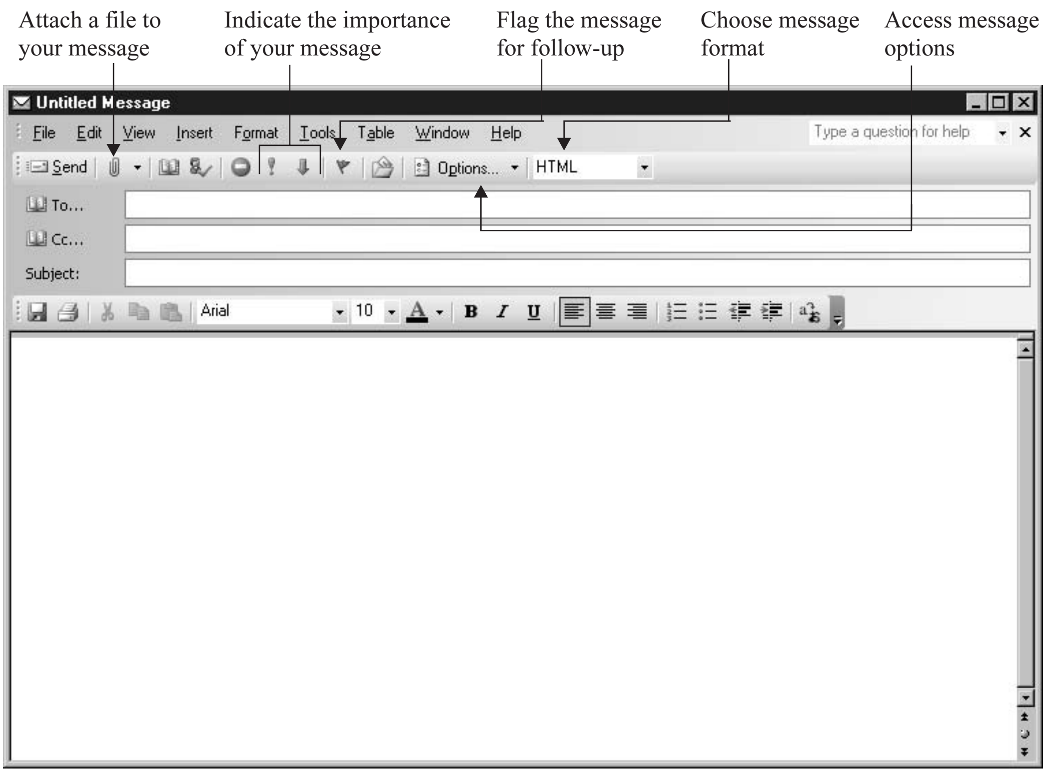


FIGURE 22-3 Everything you need to address, compose, and format a message is in the Untitled Message window, and you'll use familiar Word tools for much of your work.

or you can type email addresses directly into the box. If you want to send "blind carbon copies" (Bcc… copies), click the Options drop list and choose Bcc from the submenu. When you do, a Bcc address line will appear in the Message window.

CAUTION

Blind carbons are sent to the people whose email addresses are listed in the Bcc field, but none of the other To or Cc recipients will know that anyone has been blind carboned. Be careful when using the Bcc feature, and consider letting the Bcc recipients know, through another message, that they've been blind carboned—otherwise, they might not notice that their address doesn't appear in the To or Cc box and might reply to the message, thus revealing their having been included in your mailing.

After addressing your message, give it a subject, which will tell the recipient what your message is about. If you leave the Subject field blank, your recipients will see a blank in their list of incoming messages, which some people find annoying. It's a good idea to always include a subject, even if it's just "Hello from Bob" (if your name is Bob, of course). Once you've done that, press TAB to be taken automatically to the message box, where you'll simply start typing your message. After there is text in the box, the formatting tools will become available, and assuming your message format is set to HTML or Rich Text, you'll be able to choose fonts, sizes, colors, and apply alignment, bullets, and numbering formats to your text.

Attaching Files to Messages

Sending file attachments is the most common way of getting documents from one person to another. You have a Word document or Excel spreadsheet that you need to pass off to a coworker? Just attach it to an email message and—voilà—there it is on the other side of the office. If you're sending an attached file to people outside of your office, you'll need to be aware of any file size limitations their email provider may have. In general, you don't want to send an attachment that is larger than 5MB in size. In some cases the limitation might be even smaller. For example, AOL won't accept any attachment over 2MB.

TIP

If you have a large file or group thereof to attach to a message, you can try zipping (compressing) the file(s) with a program such as WinZip. This can take several megabytes of attached files and reduce them to a single, manageable-sized file. Of course, the amount of size reduction you'll achieve varies by file type—but you'll get some reduction in all cases. If you don't have WinZip, you can download a trial version and then later purchase the software from www.winzip.com.

You can attach a file to an email message in a number of ways. You can select Insert | File from the Message window's menu bar or click the Insert File button (which looks like a paperclip) on the toolbar. Each of these methods opens the Insert File dialog box (see Figure 22-4), from which you can select any file on your PC to attach to your message. If you want to attach multiple files, just press the CTRL key as you click the individual files (assuming they're all in the same folder). Then, when all the files you want to attach are selected, press ENTER. If the files are not all in the same folder, simply attach one file and then repeat the Insert File process to attach the others from other folders.

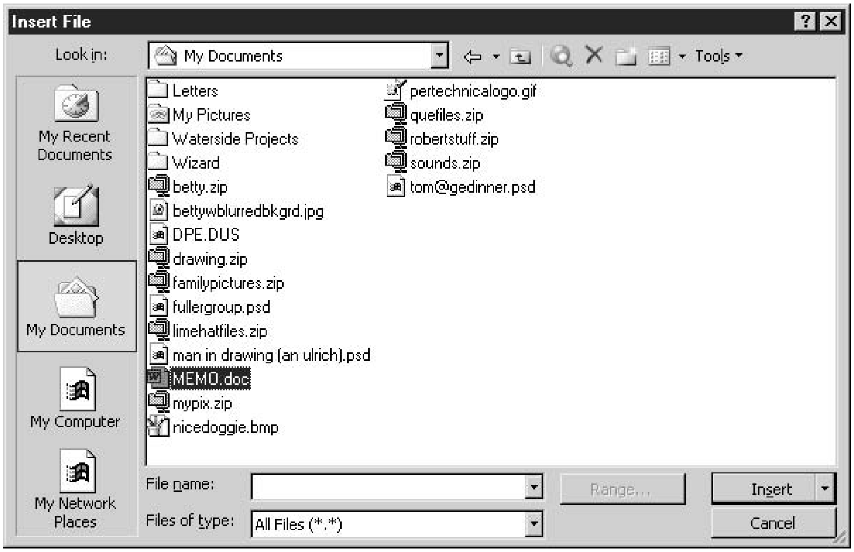


FIGURE 22-4 Navigate to the folder containing the file you wish to attach and then double-click the file to attach it to your message.

TIP *You can also attach a file by simply dragging the icon of the file you want to attach from anywhere in Windows (the Desktop, Windows Explorer, My Computer) and then dropping it into the body of the Message window.*

Working with Message Flags, Levels, and Receipts

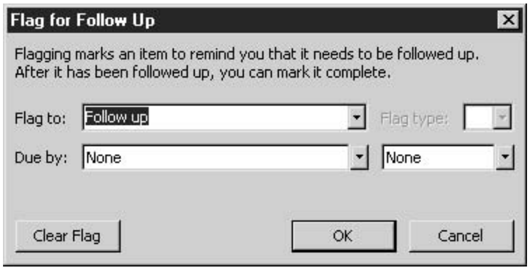
Before you send your message, think about any last-minute things you'd like to do. Would you like to be told when the message is received and read? Would you like to mark the message important so that the recipient doesn't delay reading it? Would you like to insert a flag that tells the recipient what you'd like him or her to do upon reading your message? All these extras are easily applied to your new message, simply by clicking buttons on the main toolbar or using the Options button and its submenu.

Setting Message Importance

The importance of a message can be set to High, Normal, or Low. The default is Normal, and you'll see High and Low buttons on the toolbar (red exclamation point for High, blue down-pointing arrow for Low). Depending on which importance you choose, an icon will appear next to the message in the recipient's Inbox, letting him or her know that your message is either very important and should be opened immediately or not terribly important, and he or she can open other more pressing messages first.

Flagging a Message

You can add a flag icon to a received message to act as a reminder for yourself, or you can add flags to outgoing messages to indicate a course of action for the recipient. To apply a flag, click the Flag button on the toolbar and use the resulting Flag for Follow Up dialog box to choose from a series of actions for the recipient to take based on your message (such as Follow Up, Forward, Read, Reply, and so on). You can also pick a due-by date if the action is time-sensitive. Note that a calendar will display when you click the Due By drop list, and you can click the month and day you'd like associated with your flagged action.



TIP *To get rid of a flag, click the Flag button and then use the Clear Flag button in the Flag for Follow Up dialog box.*

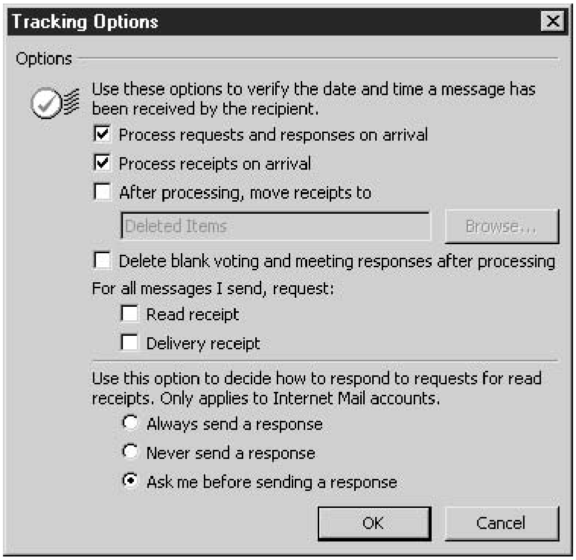
Asking for a Receipt

Don't you hate it when people claim to have not received your email and you just know they got it? Well, you can foil their attempts to evade your email by asking for a receipt—either when the message is received, read, or both. Of course, your recipients can foil you by setting their Outlook to refuse requests for receipts, but many people don't bother to do this, so you can still "catch" them having received and/or read your message.

Receipts can be requested on a per-message basis (using message options within a given message window) or globally, by establishing an automatic request for receipts on all sent messages. I prefer to ask for them on a per-message basis, because given the volume of mail I send, I could be inundated with receipts. If, however, you absolutely must have receipts for all your sent messages, you can set Outlook up to ask for receipts on all outgoing mail. Just follow these steps:

1. In the main Outlook window (with Mail selected in the Navigation pane), choose Tools | Options.
2. Click the Preferences tab.
3. Click the Email Options button. The Email Options dialog box opens.
4. Click the Tracking Options button, which opens the Tracking Options dialog box.

5. Under the For All Messages I Send heading, choose Read Receipt or Delivery Receipt (or both).



To request a receipt for just one message (assuming you have *not* turned on the aforementioned automatic request for all outgoing messages), follow these steps:

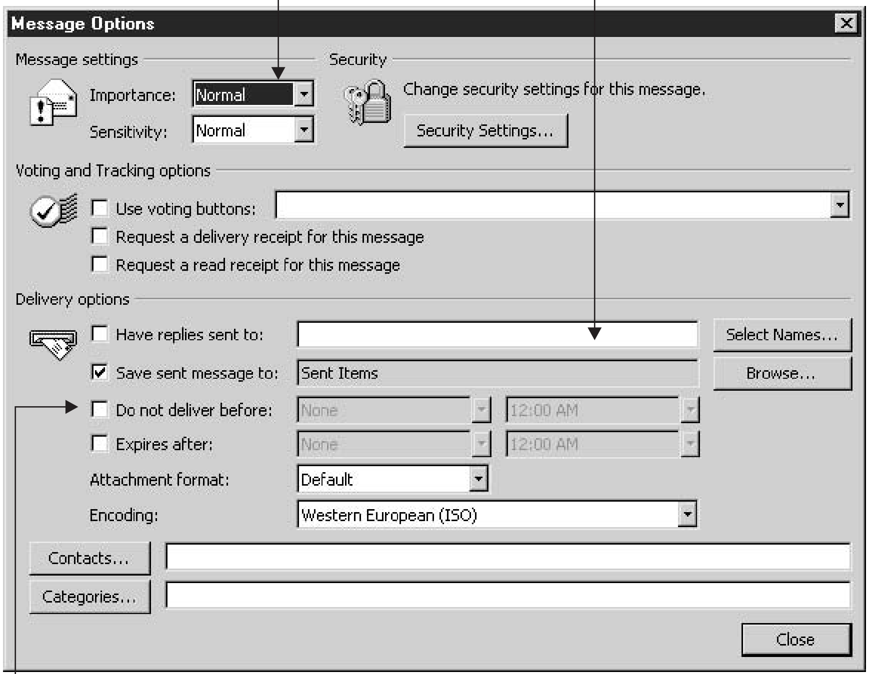
1. In the new Message window, click the Options drop list and choose Options from the resulting submenu.
2. In the Message Options dialog box (see Figure 22-5), click the Request a Delivery Receipt for This Message box and/or the Request a Read Receipt for This Message box.
3. Click OK to apply your settings and return to the message in progress.

Sending Your Message

Once your message is addressed, composed, flagged, and formatted (find out more about that process later in this chapter) and you've set an importance level and attached any files that need to go with the message, you can send it. The process of sending a message is unbelievably easy—

An alternate method of marking the message's importance

You can choose another address to which replies to this message can be sent.

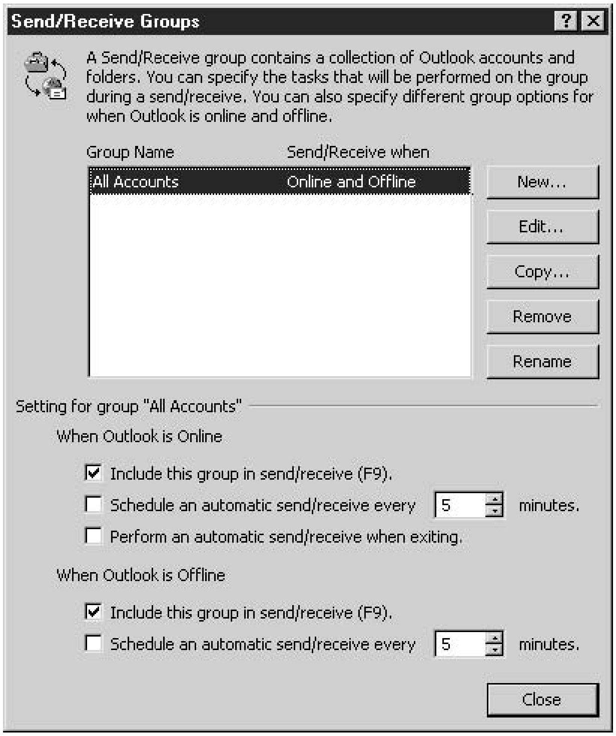


Put your delivery of the message on hold here.

FIGURE 22-5 Control the settings for your individual message, asking for receipts or setting up alternate delivery options.

just click the Send button in the message window. The message will go to your Outbox, where it will languish until either you click the Send/Receive button or a default automatic Send/Receive session is initiated by Outlook.

To determine what kind of automatic Send/Receive settings are in place, choose Tools | Options and click the Mail Setup tab. In the dialog box, click the Send/Receive button and view the Send/Receive Groups dialog box:



If you have more than one email account, the top area of the dialog box allows you to choose which one to set up. If you want to schedule Outlook to send all the messages in your Outbox automatically, enter a number of minutes and click the check box under When Outlook Is Online. There you also have the option to have Outlook perform an automatic send/receive upon exiting the program, but note that this is a bit risky—you may forget you have something in the Outbox that you chose not to send yet.

CAUTION

I prefer to turn off all automatic Send/Receive sessions, including the one that happens when you start Outlook (it's on by default) and the one that you can set to send all outgoing mail whenever you exit Outlook. I like to let messages build up in my Outbox and then review the list before sending—that way I don't risk firing off a message I wrote in haste or anger without a chance to review it or to change my mind about sending it at all.

Replying to Messages

Replying to messages you've received is yet another straightforward operation. You have the option of replying to either the sender or to all recipients of the message, including the sender. Simply select the message to which you want to reply and click either the Reply button or the Reply To All button on the toolbar. You can also right-click any of the messages displayed in the View pane and select the same commands from the shortcut menu that appears.

When you choose Reply or Reply to All, a RE: message window opens, as shown in Figure 22-6. This window looks almost exactly like an Untitled Message window (for a new outgoing message), but there are three main differences:

- The title bar has "RE" on it, meaning that the message is REgarding an existing received message.
- The Subject field is already filled in, with RE: followed by the subject text from the message to which you're responding.
- The body of the message to which you're responding appears in the message area, below the cursor. The cursor is awaiting your response, and the message you're responding to appears below it so that the recipient of your response knows what you're responding to.

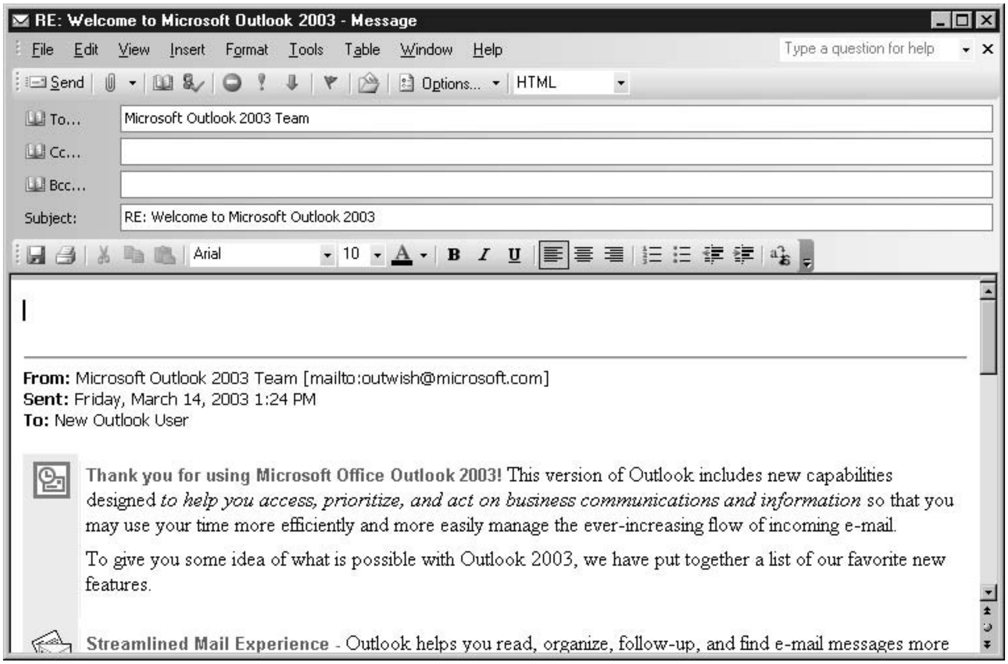


FIGURE 22-6 Reply to the sender or to everyone the sender included in the To and Cc boxes when he or she composed the message.

It's wise to use the Reply to All feature with discretion. Sometimes, even if other people were included in a message you received, your response may really only be appropriate for the sender, and he or she might not want all the other recipients to see your response. In these cases, use Reply instead so that only the sender gets your response, or use Reply to All, but be prepared to edit the list of recipients to remove anyone who might not like what you have to say. If, on the other hand, your response is for everyone's eyes—every single recipient included in the original mailing—go ahead and use Reply to All and keep the conversation going and everyone "in the loop."

Forwarding Messages

Forwarding a message is much like replying to one, except that instead of automatically entering the To and Cc data, Outlook leaves that blank—obviously, it can't know to whom you intend to forward this message. After selecting the message you wish to forward, simply click the Forward button on the toolbar or right-click the message to be forwarded and select the Forward command from the shortcut menu. Then enter the email address of your intended recipient(s) in the To and Cc fields and compose a note to go with the forwarded message—normally some sort of explanation as to why you're forwarding it. When you've composed your note, go ahead and click Send.

Formatting Email Messages

Outlook can send and receive your messages in three different formats: HTML (default), Rich Text, and Plain Text. To switch between these formats, use the Message Format drop list, found on the Outlook toolbar.

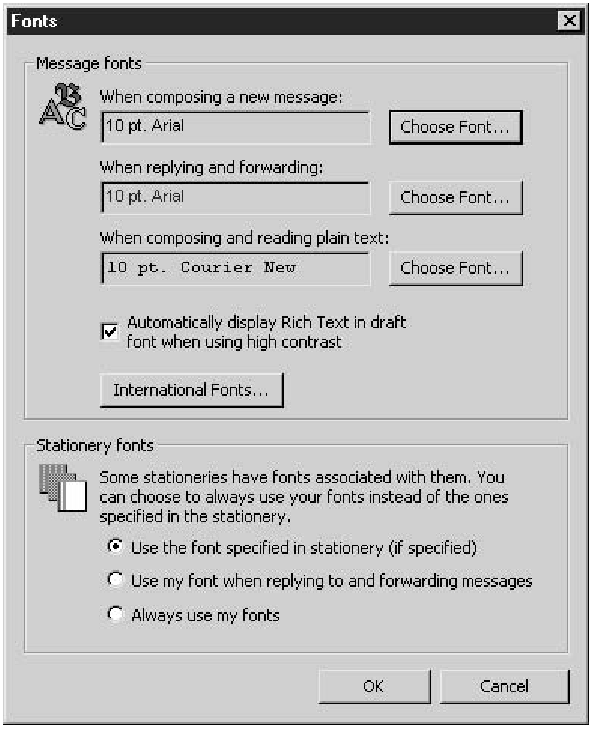
When choosing a format, bear in mind that only two of them allow any formatting—HTML and Rich Text. Plain Text allows no formatting of any kind, and your message will appear in a simple 10-point Courier font. HTML supports much of the same formatting of text you find in Word, including numbered lists, bulleted lists, text alignment, pictures, and background images. Many email applications support HTML messages; however, there are some that don't. In those cases, your message will appear as plain text with all the HTML code visible. You will want to know the capabilities of your recipients' email applications, particularly if you intend to send complex marketing material via email or if the contents of your message rely intricately on the specific formatting you've added. If you're using Outlook on a local area network, you won't have to worry about these things because everyone on the network will presumably be using Outlook.

If you find out that your recipients can't accept HTML mail (some email servers strip out the formatting, as stated earlier, and others simply reject HTML-based mail because it could be "spam" or junk email), you can still format the appearance of your message text if you choose Rich Text format. With Rich Text, you can apply text colors, fonts, sizes, and bullets and numbering. You can also select a URL within your message and click the Insert Hyperlink button to turn the text of the URL into a clickable hyperlink for the recipient. The Insert Hyperlink button is dimmed if you choose Plain Text.

Setting a New Default Font

By default, Outlook is set to use 10-point Arial when you're composing messages. This is a clean, neat, and professional-looking font, but what if it just doesn't suit your taste? Change it! Like most of the configuration settings in Outlook, this will take you back to the Options dialog box, reached by selecting Tools | Options from the menu bar.

Just as you did when setting the default email format, click the Mail Format tab and look at the middle section of the dialog box, titled Stationery and Fonts. Click the Fonts button, and in the resulting Fonts dialog box, shown next, use the Choose Font buttons to select the fonts you want used for composing messages, replying and forwarding messages, and reading and composing plain text.

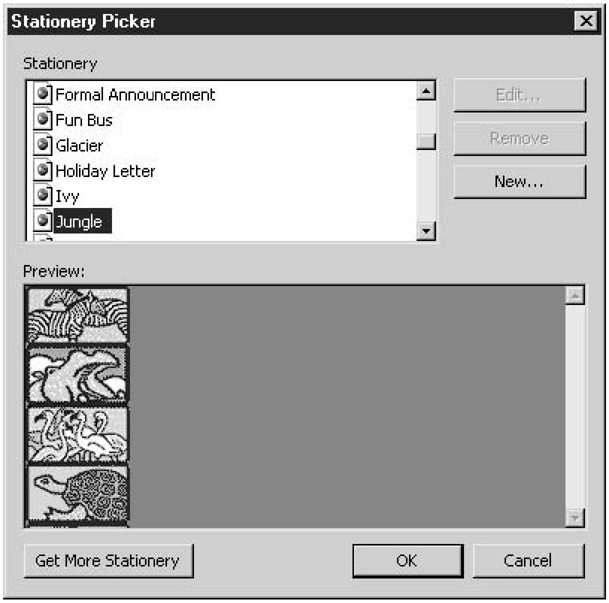


TIP *Although you'll want to pick a font that's "you," you'll also want to choose one that is legible and reasonably popular, so that your recipients can display it on their computers.*

Choosing Stationery

Outlook comes with some very nice stationery options that allow you to personalize the messages you send with a graphical background, preset fonts, colors, and text layout. Selecting a stationery package of your choice is just like setting your default font—and it will apply to all outgoing messages, so make your selection with that fact in mind. To apply a default stationery to your messages, follow these steps:

1. Choose Tools | Options, and in the resulting Options dialog box select the Mail Format tab.
2. Click the Stationery Picker button. This opens the Stationery Picker dialog box. To preview the listed stationery choices, just click each item in the Stationery list. A preview of the stationery appears in the big box in the lower half of the dialog box.



If you don't see any stationery that suits your fancy, try clicking the Get More Stationery button. This will connect you to the Microsoft Office Download website (assuming you're online at the time), where you can look for more stationery to install on your machine.

TIP *If you want to apply the look of stationery to a single outgoing message, use that message window's Format | Background command to choose from solid colors and Fill Effects to place behind your text. You can also use the Format | Theme command to choose from a variety of presets—fonts, sizes, and bulleting and numbering styles that have names such as Arctic, Canyon, and Travel. Make your choice from the list of themes, preview it, and click OK if you like it and want to apply it to your message. Be aware, however, that the size of your message (and therefore the time it will take dial-up users to receive it) will be increased by using Themes.*

Formatting Message Text

The actual formatting of text when in HTML format is similar to formatting text in Word, and exactly like formatting text in FrontPage, because they are both HTML-editing tools. The Formatting toolbar, found in any message window, is nearly identical to Word's Formatting toolbar, and it allows you to format headings and paragraph styles; select fonts, font sizes, and colors; set physical styles (bold, italic, underline); set alignment; create lists; and insert horizontal rules. If you change the format of the message to Plain Text, the Formatting toolbar will be dimmed, and text will appear in the default font you set for plain text in the Fonts dialog box.

Working with Signatures

A signature is a closing—typically your name, title, phone number, and/or web address—that appears at the foot of all outgoing messages, replies, and forwards. As shown in Figure 22-7, using a preset signature saves you typing the same information at the end of all your messages, and it prevents any messages going out without any "sign-off" or indication of your identity as the author of the message, which can be considered rude.

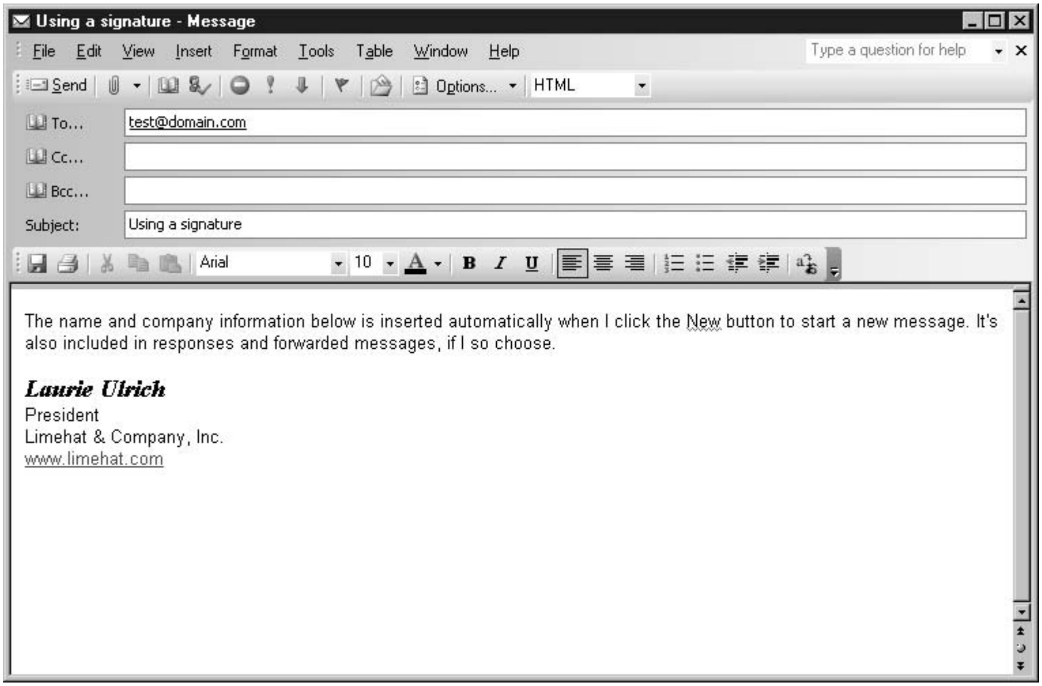
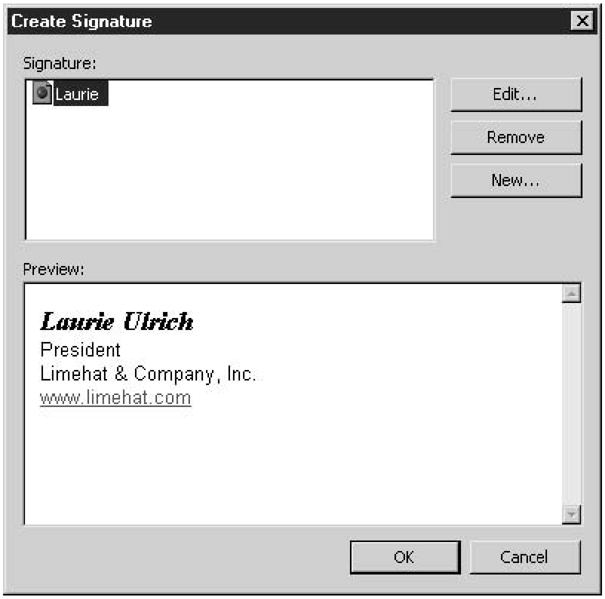


FIGURE 22-7 Create an automatic closing for your messages.

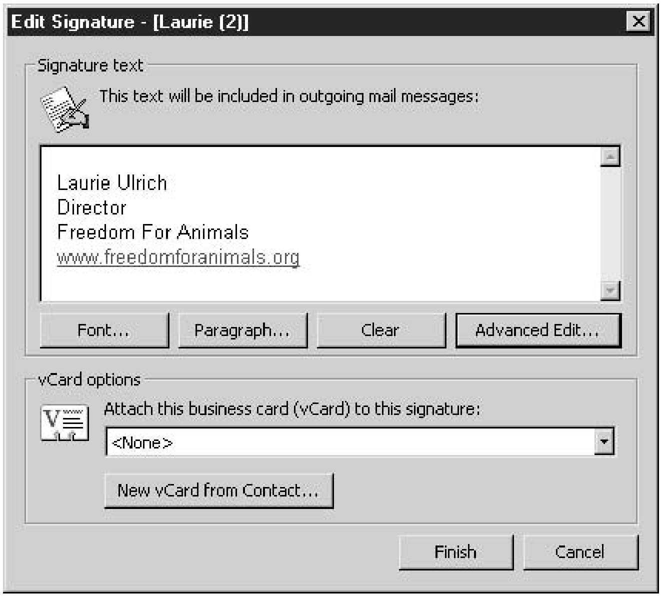
Creating a Signature

To create a signature, choose Tools | Options and click the Mail Format tab. In the resulting dialog box, click the Signatures button, found in the Signatures section of the dialog box. The Create Signature dialog box opens, through which you can create a new signature, edit it, and apply formatting to some or all of the signature content.



To continue creating a new signature, follow these steps, starting inside the Create Signature dialog box:

1. Click the New button.
2. Type a name for your signature (preferably your name or the name of the email account with which you plan to associate the signature).
3. Leave Start with Blank Signature selected and then click Next.
4. In the resulting Edit Signature dialog box, type your signature into the white box where you see your cursor blinking.



5. Use the Font button if you want to apply a different font, size, or color to some or all of your signature text. Always select the text to be formatted (using your mouse) before clicking the button.
6. If you want to change your signature's alignment, click the Paragraph button and choose Left, Center, or Right. You can also apply bullets.
7. When you've typed and formatted your signature as desired, click Finish. This places you back in the Create Signature dialog box, where you can create another signature (starting with New again) or click OK to go back to the Options dialog box.

Establishing Signatures for Different Email Accounts

New to Outlook 2003, you can set up signatures for individual email accounts. In the past, you could have multiple signatures on file, but whichever one you had selected as the default would apply to all outgoing messages, replies, and forwards. You could switch between the defaults, but it was a tedious process, and people often forgot to switch signatures when using one email account or another.

To apply a signature to a specific email account (assuming you have more than one established through Outlook), follow these steps:

1. Choose Tools | Options, and in the Options dialog box click the Mail Format tab.

2. In the Signature section of the dialog box, click the Select the Signature to Use with the Following Account drop list and choose one of your email accounts.
3. Click the Signature for New Messages drop list and pick the signature you want to use for the email account you chose in the previous step.
4. Choose a signature for replies and forwards for the selected email account.
5. Go back to the drop list where you chose an email account and repeat steps 2 through 4 for each of your accounts, choosing a different signature for each one, as desired.
6. Click OK.

Creating Folders to Organize Email

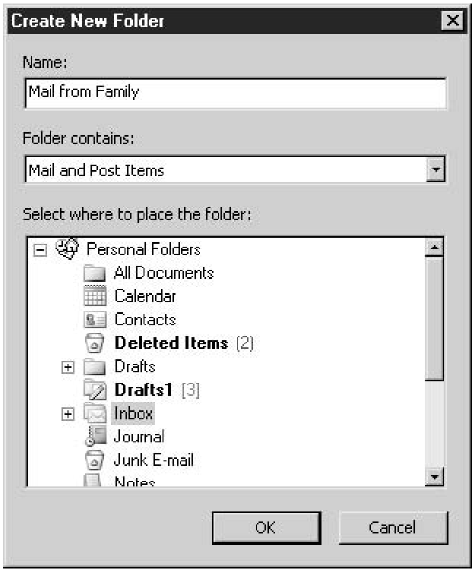
Assuming that you'll receive a lot of email, you'll want to organize them just as you would your Word documents, Excel worksheets, and all the other files you create with your Office and other manufacturers' applications. To organize those files, you can use the Windows Explorer or My Computer, creating folders and moving files from folder to folder until you have them just where you want them. The process is simple because it mimics the method you'd use to organize paper files in a file cabinet—you'd place them in appropriately named folders and store them alphabetically in a drawer.

This same concept and a very similar process is used in Outlook to organize your email, both incoming and outgoing, as you create folders within your Inbox and Sent Items folders to store email messages by nearly any organizational criteria you can imagine—topic, sender, recipient, or date, just to name the more common choices.

Setting Up Inbox and Sent Items Folders

Setting up folders inside your Inbox (for incoming mail) or the Sent Items folder (for mail you've sent) is no different from creating folders anywhere in Windows. First, you'll want to make sure you've selected Mail from the Navigation pane so that your Inbox and folders lists (Favorite Folders and All Mail Folders) are displayed. After that, it's just a matter of right-clicking the Inbox or the Sent Items folder in the Folder list and selecting New Folder from the shortcut menu.

After making this selection from the shortcut menu, you're prompted by the Create New Folder dialog box, shown next, to enter the name for the folder and choose the type of information the folder will contain. The dialog box also displays the folder hierarchy with the folder you right-clicked highlighted. If you change your mind about where you want to create the new folder, you can select the proper folder here.



After you've named your folder (you can ignore the Folder Contains option because the default, Mail and Post Items, is fine), click OK to create the folder. You can repeat the process for as many folders as you need, and you can put folders within folders—for example, if you create a folder in the Inbox called "Mail from Family," you can create subfolders within that folder for each branch of your family, for particular family members, or for family events, such as "Reunion Mail."

Moving Messages Between Folders

Once your folders are created, you can move messages into them very simply—just drag the envelope icon for the message you want to move over to the Folder list and drop it on the folder of your choice. When the target folder is highlighted, release the mouse to drop the message into that folder, as shown in Figure 22-8.

If you want to move multiple messages from one folder to another, you can select them by holding down the SHIFT key to choose a continuous range of messages or by holding down the CTRL key to pick a number of noncontiguous messages in the list. After making the group selection, drag them en masse to the folder of your choice. If you prefer keyboard shortcuts, you can use CTRL-C to copy or CTRL-X to cut your messages and then open the folder of your choice and use CTRL-V to paste the message files in place.

NOTE *The Favorite Folders portion of the Folders pane contains a folder for mail that requires follow-up and a folder for unread mail. These are considered virtual folders in that they don't physically exist the way that the Inbox and Sent Items folders (and subfolders within them that you create) do. They're conceptual folders that help categorize mail that requires some action over and above its categorization by topic, sender, recipient, or whatever criteria you'd use to place a message in a real folder.*

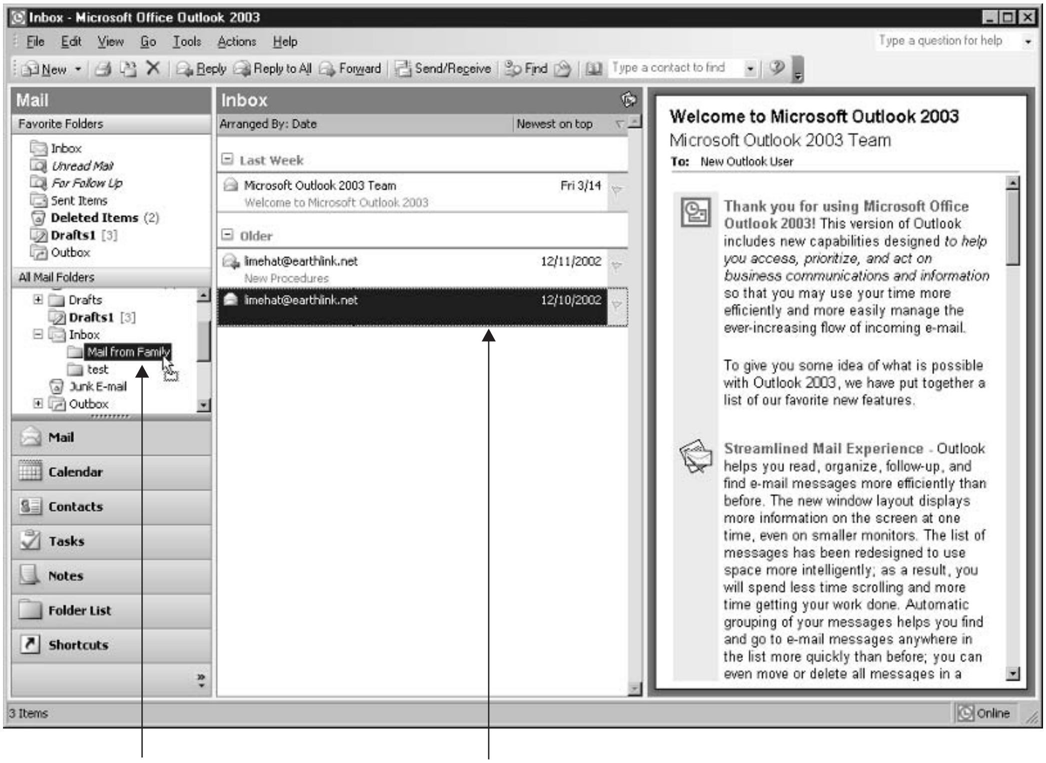


FIGURE 22-8 Drag and drop your messages from one folder to another.

Deleting Messages

Deleting messages is equally simple and no different from what you're already used to. Select the message you want to delete and press DELETE to move the message to the Deleted Items folder within Outlook. You can also drag messages to the Deleted Items folder just as you might drag a file from your desktop onto the Recycle Bin. Just like the Recycle Bin, the Deleted Items folder will hold on to the messages placed inside it until you empty the folder manually. Then, and only then, are files truly "gone." To empty the Deleted Items folder, right-click it and choose Empty "Deleted Items" Folder from the shortcut menu. You'll be prompted to confirm your intention to delete all the messages in that folder, and assuming you want to do so, click Yes in response to the prompt.

Filtering Junk Email

Many senders of junk email (also known as *spam*) use HTML content in the message itself to verify that you are an actual email user, with a valid email address. They do this to eliminate dead email addresses from their mass-mailings so that their future emails don't go to people who don't really exist. This "web beacon" technique is blocked by Outlook 2003, through its tools that block any external content included in an HTML-based email. You can customize how your email is protected from spammers through the Junk Email Options dialog box, shown in Figure 22-9.

To access this dialog box, choose Actions | Junk Email, and from the submenu choose Junk Email Options. The submenu also includes Add commands for building a list of senders you trust (so all their email will be accepted) and a list of those you know to be junk email senders.

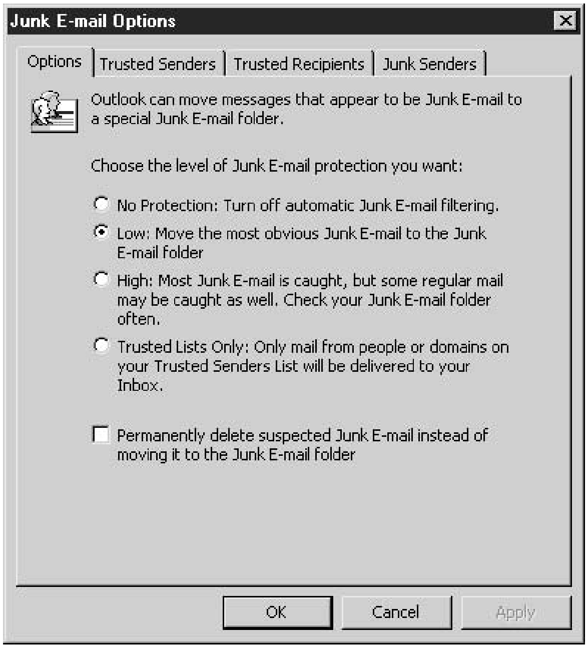


FIGURE 22-9 Set the level of spam-interception you want through the Options tab and choose whether or not to permanently delete mail deemed to be "junk."

Chapter 23

Scheduling Tasks and Appointments

How to…

- View the Outlook calendar from daily, weekly, and monthly perspectives
- Add one-time and recurring appointments and events to the calendar
- Schedule meetings with your coworkers
- Customize the calendar to meet your needs
- Build and maintain a list of to-do items
- Print your schedule

Outlook has a tightly integrated calendar and scheduling module that is tied into your email, contacts list, and a host of other Outlook features. Simply titled the Outlook Calendar, it is essentially an electronic version of any organizer you might purchase at an office supplies store. What's nice about this one is that you aren't limited to one type of layout. You can view a single day by hour, the whole work week by day and hour, the week as just blocks of days, or the entire month like a giant desk pad. You can schedule appointments and events, even setting audio reminders to get your attention and color-coded entries to quickly pick out important appointments at a glance.

TIP *Can't be tied to your desktop? Not a problem! Outlook can be synchronized to a number of handheld devices so you can carry your calendar, task list, and contacts wherever you go. Check the documentation that comes with your handheld device for more information.*

A Tour of the Outlook Calendar

Accessing the calendar requires only a click of the Calendar button on the Navigation pane. You can also choose Go | Calendar. The view you see (Day, Week, or Month) is dictated by which view you had open last. Day and Week (or Work Week) views allow you to see the entire calendar workspace, including the TaskPad, as shown in Figure 23-1, whereas Month view's full calendar dominates the Outlook window, as shown in Figure 23-2.

The calendar is divided into three primary areas:

- **Appointments list** This area displays the hours of the day while in Day, Week, and Work Week views. Notice that the hours before 8:30 A.M. and after 5:00 P.M., and all hours on weekends, are shaded, indicating they are not traditional work hours. You can click any time increment and begin typing to enter information.
- **Date Navigator** This is how you get around in the calendar. While in Day view, click any date to see the schedule for that day. In Work Week view, click any day to have the entire five days displayed. You can also use LEFT ARROW and RIGHT ARROW keys to move forward and back. In the regular Week view, the arrow keys will move you forward

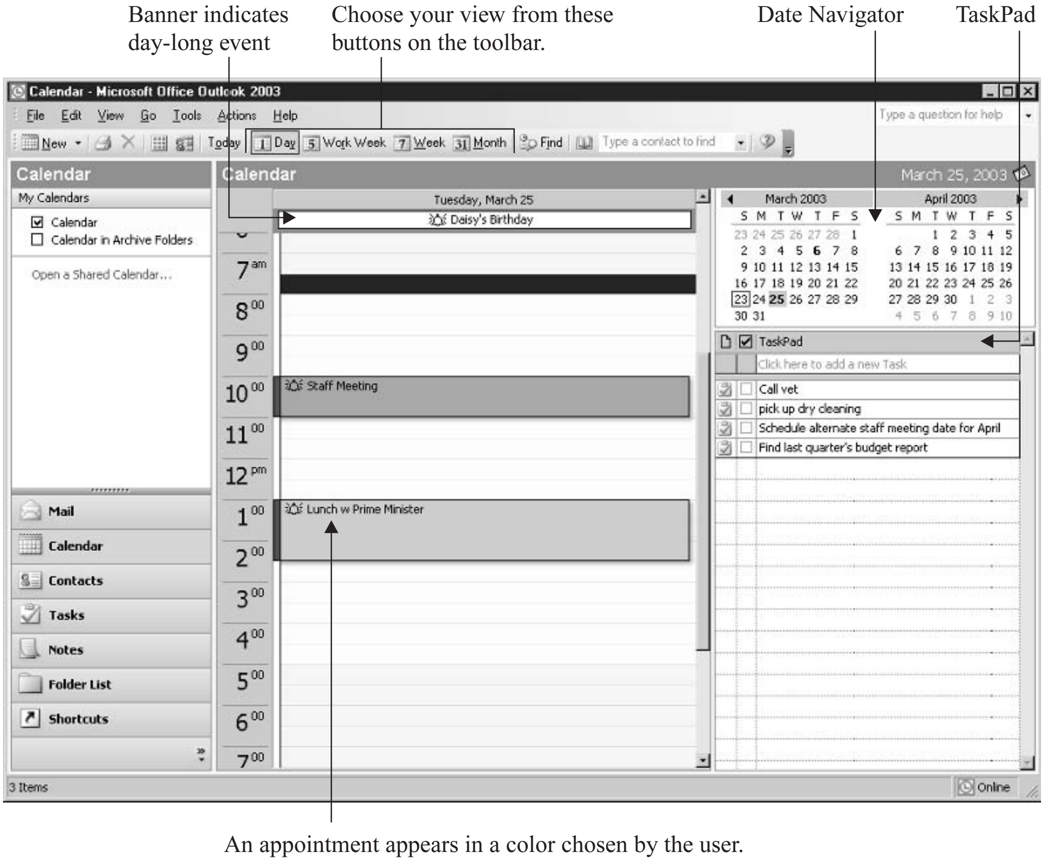


FIGURE 23-1 The Outlook Calendar in Day view allows you to focus on a single day's activities.

and backward, whereas clicking an individual date will pop you into Day view. Use the two arrow buttons on either side of the Date Navigator (see Figure 23-1) to scroll through the months of the year. You can also click each month's heading to see a drop list from which you can select from a seven-month range—three months before and three months after.

- **TaskPad** This tool is for (you guessed it!) entering tasks. Some people like to see it onscreen while in any view of the calendar, and others prefer to see their tasks only when Tasks is chosen from the Navigation pane. If you want to see your to-do list while viewing your calendar, choose View | TaskPad.

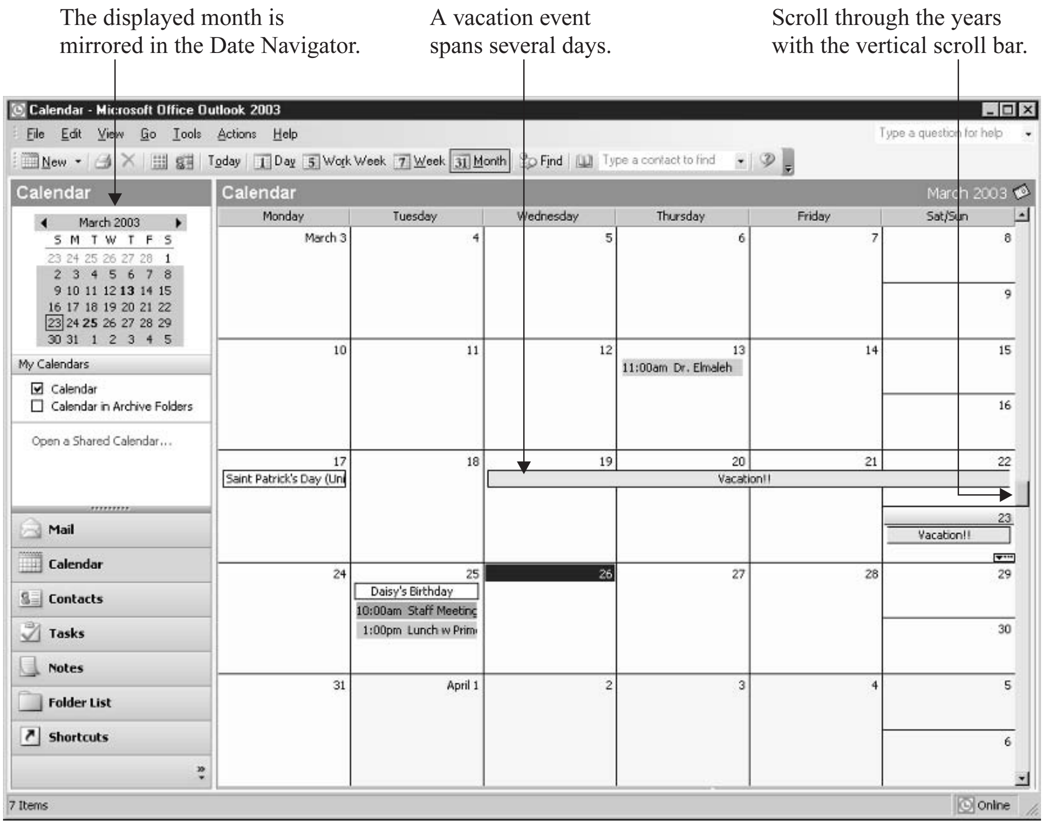


FIGURE 23-2 If you need to see your schedule from a greater distance (and with less extraneous information included), choose Month view.

Understanding Calendar Entries

The Outlook Calendar recognizes three kinds of entries, and their terminology and parameters operate under the assumption you are using Outlook in a cooperative office environment. This certainly doesn't mean you can't take full advantage of the calendar in a standalone capacity, as many people do.

- **Appointments** These are individual activities that don't require you inviting other people in your workgroup. When you create an appointment, you can choose how you want your calendar to appear to the other members of your group, displaying that time as Out of Office, Busy, Tentative, or Free. Alternatively, you can make appointments private, so others can't see them at all. You not only have the ability to schedule appointments in your own calendar, but permissions can also be granted allowing others to schedule and edit appointments in a coworker's calendar. This is useful, for example, when an administrative assistant is responsible for maintaining an executive's appointment book.

- **Meetings** Unlike appointments, which involve only your time, meetings involve inviting other coworkers and reserving office resources such as conference room space or setting up video or phone conferences and the equipment required. When you schedule a meeting in Outlook, you select the people to invite and whatever resources are required. The request for a meeting goes out to your coworkers in the form of an email, and you receive their responses (indicating their ability to attend) in your Inbox.
- **Events** Unlike meetings and appointments, events are at least day-long occurrences—for example, your vacation, a business trip, or someone's birthday. An event doesn't appear as a consumed block of time in Day or Work Week view, but rather as an event name banner running across the top of the dates specified for the event.

Creating Appointments, Events, and Meetings

The nice thing about the Outlook Calendar is that the same basic dialog box is used for each type of calendar entry, so once you know how to create one type you know how to create the others.

Setting Up an Appointment

Select the day for which you want to schedule the appointment, either using the Date Navigator or clicking the date in Month view. Then do one of the following:

- Click the New button on the toolbar.
- Double-click an hour in Day or Week (or Work Week) view.
- Right-click any day or hour block in the Month, Day, Week, or Work Week view and choose New Appointment from the shortcut menu.

Any of these methods opens the Appointment dialog box, shown in Figure 23-3.

From here, enter the subject and location for the appointment in the fields provided. Each time you enter a new location, Outlook remembers it so you can quickly select it again using the location drop arrow. Next, select start and end times and enter a reminder interval if you choose. The Show Time As field will automatically be set to Busy. You can, of course, set it to any option you prefer, such as Free, Tentative (so others know you'd be willing to reschedule in favor of something else), or Out of Office. In the Appointment dialog box, if your start and end values are greater than 23 hours, the entry will be displayed as an event.

If the appointment is going to be repeated at regular intervals, click the Recurrence button on the toolbar to display the Appointment Recurrence dialog box. There you can define parameters

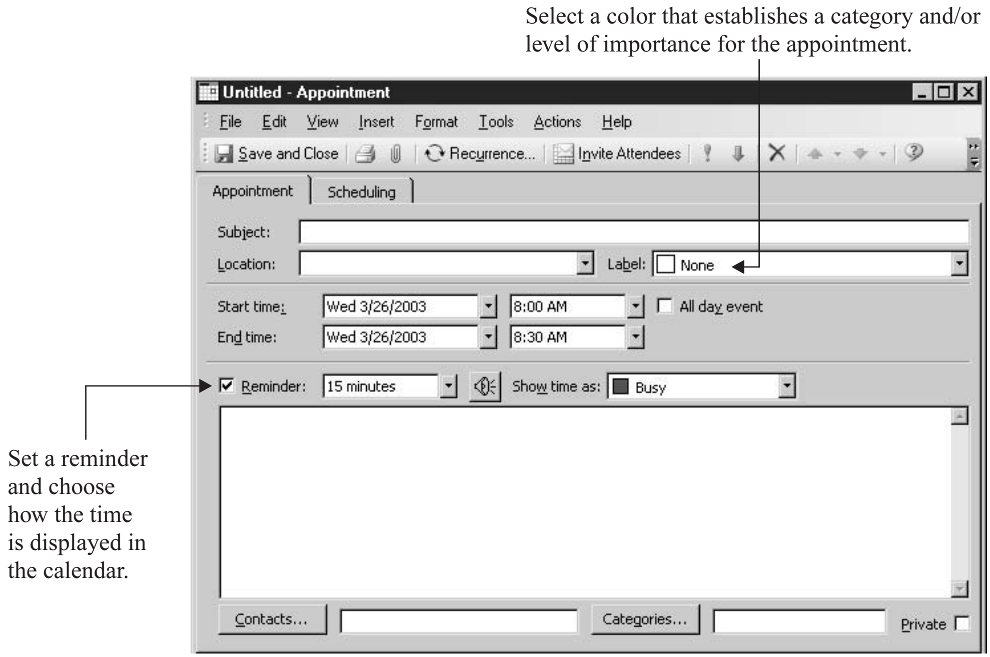
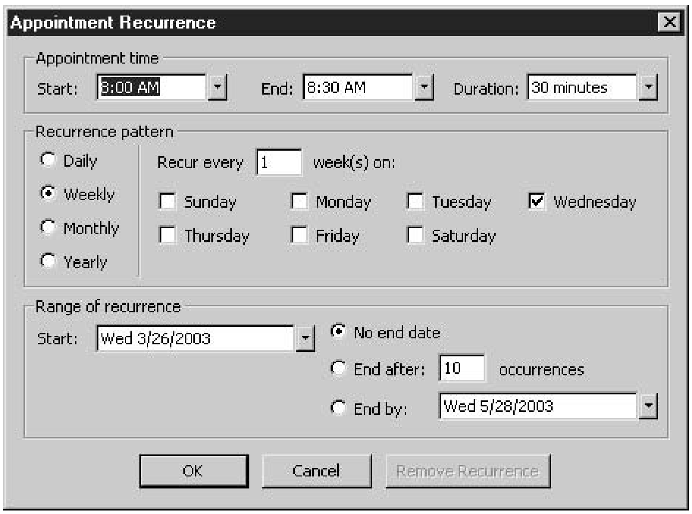


FIGURE 23-3 Enter the dates, times, and a description of your appointment.

such as the recurrence pattern (how often the appointment occurs) and the date range across which the appointment repeats. Click OK to return to the Appointment dialog box.



TIP *You can edit recurring appointments or events so that just one occurrence or all the appointments/events are affected. This makes it possible to change or delete just one instance of a recurring staff meeting, doctor's appointment, or event and leave the rest of the series of recurrences intact.*

Once you've entered all the necessary information for your appointment (don't forget to apply a color label—it really helps you when you view your entire schedule later), click the toolbar's Save and Close button to see your appointment displayed in whichever calendar view was last active. Depending on the length of the description (some of the text will be truncated in Month view), it should look pretty much the same in each view, within the confines of the view itself.

If you need to edit the appointment, simply double-click it wherever it appears in the calendar to open it in the Appointment dialog box. If you want to quickly modify the duration of an appointment in Day or Work Week view, simply drag its borders: top (to adjust the start time) or bottom (to adjust end time). To move an appointment to another day, just point to it and immediately drag it to the desired date. Don't click and pause because Outlook will think you want to edit the appointment description, in place. You can also duplicate an appointment by dragging it to another date while holding CTRL down—be sure to release the mouse before releasing CTRL when the appointment duplicate is positioned on the date you want.

TIP *You can enter appointments directly into the Day or Work Week view by simply clicking in a time slot on the Appointments list and entering your information directly into the view.*

Entering an Event

Entering event information is no different from creating an appointment, except that you check the All Day Event check box. This removes the Start and End time interval drop lists from the dialog box, leaving you with only the date ranges. If you want to include the times, as mentioned earlier, as long as the duration spans a full day, it will be displayed as an event. Anything less will just be seen as an extremely long appointment.

How to ... Use the Reminder Option for Appointments, Events, and Meetings

Use the Reminder check box (above the large text box in the Appointment dialog box) and set a time prior to the appointment, event, or meeting for which you should be given an alert or reminder. If you want a sound to play (in addition to the prompt dialog box that appears when the designated time prior to the appointment is reached), click the button with a speaker on it and choose the sound file that you'd like to play. The default is reminder.wav, part of the Office suite's group of preset sounds. Something to remember: When choosing how far in advance of the appointment to set the reminder, make sure you're allowing enough time to get to the appointment—if it takes an hour to drive to the appointment location, a reminder that appears just 15 minutes in advance won't be very helpful!

Scheduling a Meeting

Meetings obviously require people to meet with, a place to meet, and occasionally, other resources. Outlook's meeting scheduler has the ability to scan the availability of individuals you work with, as well as to reserve things such as conference rooms and equipment needed for the meeting.

To schedule a meeting, simply create an appointment as described previously and then click the Invite Attendees button on the toolbar. The Appointment dialog box displays a To field above the subject and location fields, and it changes the Save and Close button to Send, just like an email. You can now click the To button and select coworkers from your address book, or you can type their addresses manually, if you know them.

Next, click the Scheduling tab to see the availability schedule of the people you've invited, as shown in Figure 23-4. Beside each invitee's name is a bar, running across the time graph, displaying their availability. Use the legend at the bottom of the dialog box to determine if they're free to meet, busy, tentatively scheduled elsewhere, or out of the office. If your original meeting time is no good, you can easily click a time that shows better availability for the people you need to meet with. Once you're satisfied with your choices, simply click the Send button to deliver your meeting request to your desired attendees.

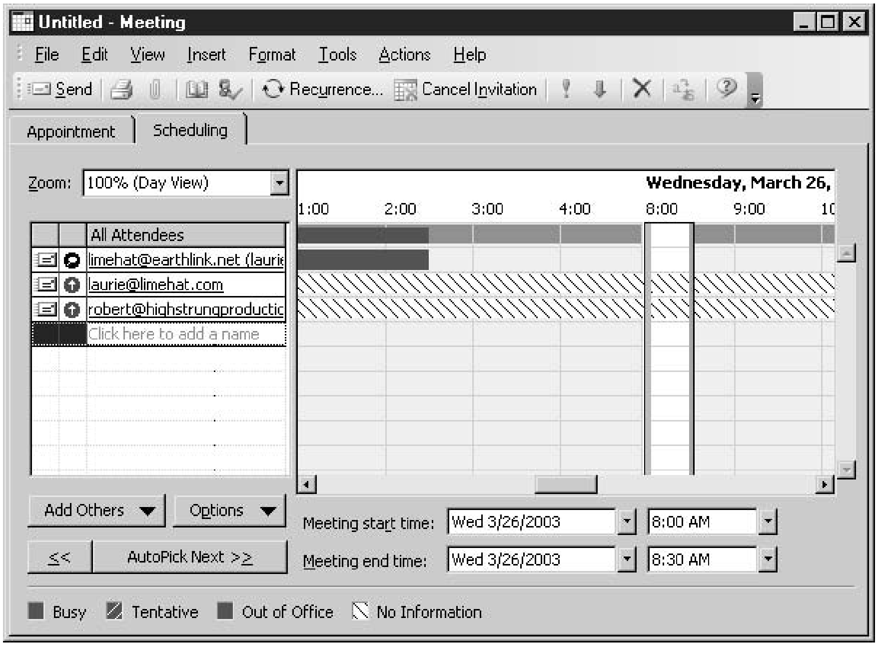


FIGURE 23-4 Use the Scheduling tab to see who's available and when to attend your meeting.

NOTE *Reserving resources requires you to use Microsoft Exchange. You'll know if you're on a Microsoft Exchange server when you create your email account as described in Chapter 22. If your account has been set up by your system administrator at work, simply ask him or her if you're using Microsoft Exchange and have the ability to schedule resources for meetings—if you are, you can add the meeting room or piece of equipment just as you would invite a person to the meeting. The individual resources will appear as entries in your address book.*

Customizing the Calendar

Even though Outlook's Calendar feature offers four different views of your calendar, which would seem to accommodate just about any need you'd have to see or not see some aspect of your schedule, you may want to customize the way one or more of your Calendar views looks.

If you want to tinker with the way the calendar looks and works, choose Tools | Options and click the Calendar Options button on the Preferences tab. In the resulting dialog box (see Figure 23-5), you can change the days of the week that you consider a "work week," change your

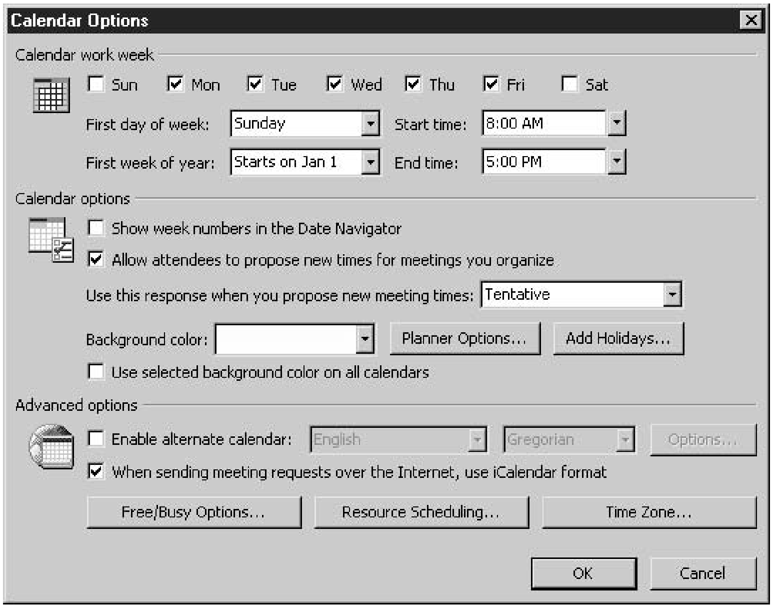


FIGURE 23-5 Choose how your calendar looks and functions and make it a friendlier tool for the way you work.

background color for Day and Week views, and even add holidays from one or more countries—your own country, and then perhaps the holidays of a country where you have clients or coworkers, and want a heads-up as to days they may be off work. You can also choose a different time zone if you'll be working in a far-off place for a while.

TIP *Use the Options dialog box and the Preference tab buttons to customize virtually every aspect of Outlook—Mail, Calendar, Tasks, Journal, and Notes. The latter two are not covered in this book because (a) they're not as widely used and (b) they're easy enough for you to figure out on your own.*

Working with Tasks

The Outlook TaskPad is your electronic to-do list. You can enter tasks for yourself for a personal to-do list, or you can delegate work and assign task requests to people in your work group. The ability to delegate tasks works if you're on a network and Outlook is set up to allow you to do so, or if you delegate to another Outlook user—all you have to do is follow through on the assignment process (described later in this section) and send them the task. For many users, the TaskPad is simply a to-do list for oneself, where you keep track of what you have to do and when, in a clear, simple list that can be edited easily.

When you build tasks, you can type anything you want for the task description, and you can pick any date for the task to be completed. Tasks can be recurring, just like appointments, meetings, and events. What's more, you can track a task from inception through to completion, following its progress—and if you put a task on the list after it's already started, you can estimate a percentage of completion so that you know that only some of the task is left to be done.

Creating a New Task

To create a task, use any of the following methods:

- Click in the text box Click Here to Add a New Task, found at the top of the task list.
- Double-click anywhere on the TaskPad.
- Click New | Task on the toolbar (assuming you've chosen Tasks from the Navigation pane).
- Select File | New | Task from the menu bar.
- Press CTRL-SHIFT-K on the keyboard.

All but the first of these methods opens the Untitled Task dialog box, shown in Figure 23-6. If you use the Click Here to Add a New Task box, you can type a description and then use the Due Date drop list to pick a date by which the task must be complete.

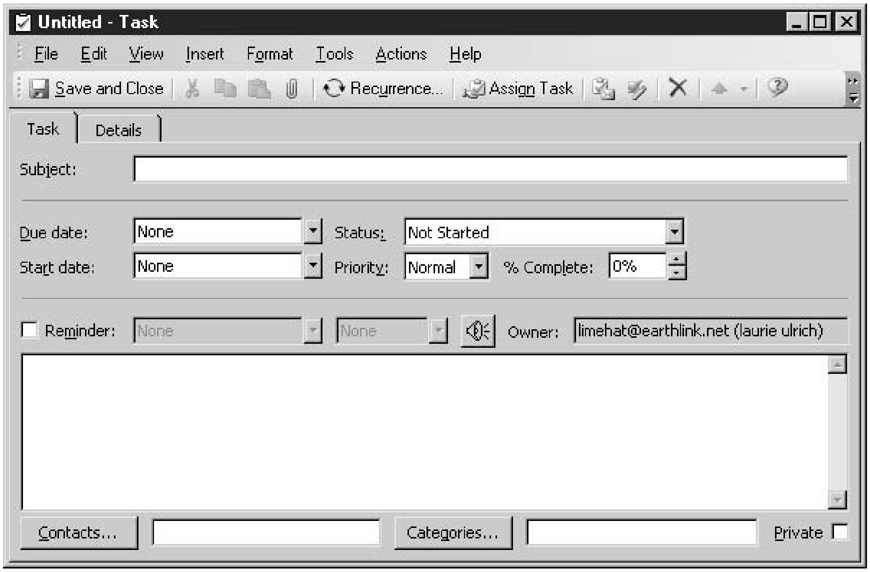
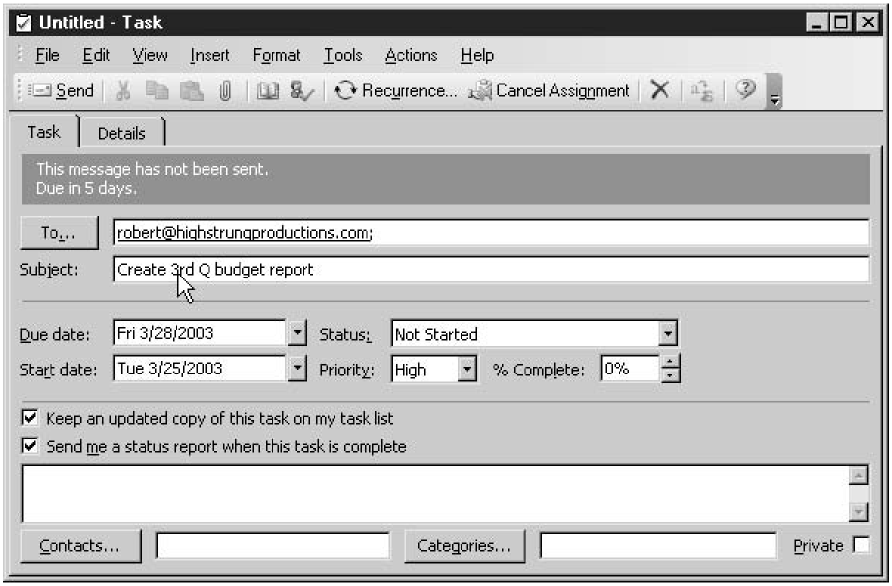


FIGURE 23-6 Set up all the particulars for your new task.

In the Untitled Task dialog box, enter a short description for your task in the Subject box, as well as the date by which the task is due and the date the task will be started, using the fields provided. If you want the task to be recurring, click the Recurrence button on the toolbar and use the Task Recurrence dialog box to set up the frequency of the recurrences and the length of time over which the task will recur. The dialog box is virtually identical to the one you see when you set up a recurring appointment. Use the Regenerate New Task radio button if you want the task to recur at a specific time *after* it is initially completed. You can use the Details tab to keep track of total hours worked, actual hours worked, mileage, billing information, and so on. When you're finished, click the Save and Close button on the toolbar.

Assigning Tasks

This procedure is very similar to scheduling a meeting, in that you're using a To field (like a message sent to invite people to a meeting) and choosing the person or persons you'd like to perform the task. To start the process, simply click the Assign Task button on the toolbar, which displays the To field and changes the Save and Close button to Send, as shown next. Enter a recipient for the task, as you would for an email or meeting request, and click the Send button when you're ready.

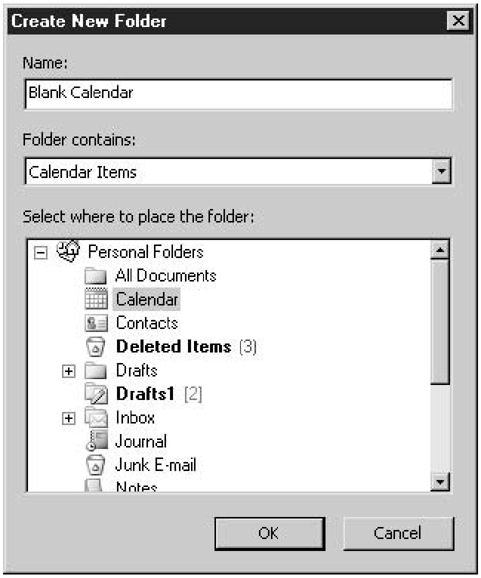


When assigning tasks, if you want to track their progress, select the Keep an Updated Copy of This Task on My Task List check box and the Send Me a Status Report when This Task Is Complete check box. To make sure these check boxes are selected automatically, on the Outlook menu bar, choose Tools | Options to open the Options dialog box. From here, click the Task Options button and select the appropriate check boxes from the Task Options dialog box.

Printing Your Schedule

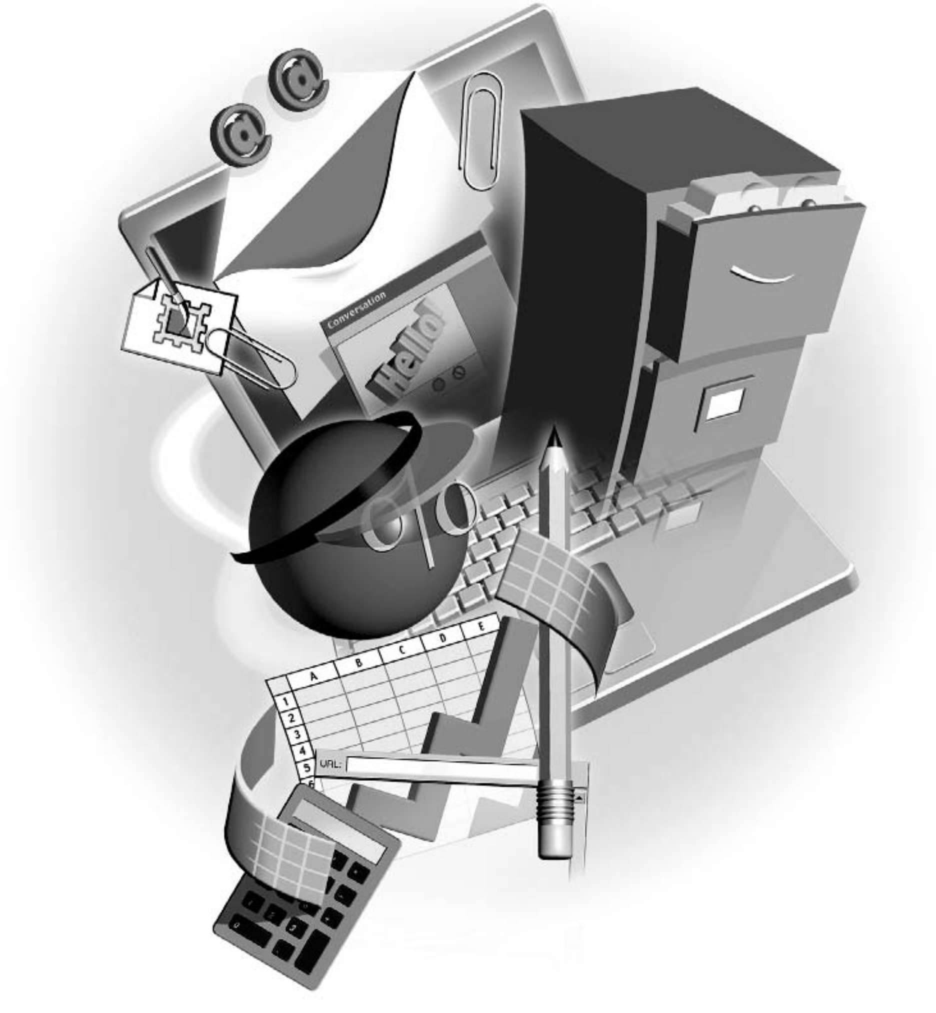
Outlook accepts the fact that sometimes nothing beats a hard copy. Therefore, it's no problem at all to print out a copy of all your appointments for a given period. While in Calendar view, simply select Print from the File menu, or press CTRL-P on your keyboard. This opens the Print dialog box, where you can select the print style you prefer. Your choices are intuitively named—Daily Style, Weekly Style, Monthly Style, Trifold Style, and, for those who want the details of their appointments, Calendar Details Style. Use the Start and End fields to select the date range you want printed and then click the Page Setup button if you want to change your page orientation or margins or to add a header or footer (recurring titles on the top and/or bottom of the page).

If you want to print a blank calendar to write on manually, create a new folder by selecting File | New | Folder from the menu bar. This opens the Create New Folder dialog box:



In this dialog box, enter a name for the folder. In the Folder Contains field, select Calendar Items. In the Select Where to Place the Folder field, select Calendar and click OK. Now view the Folder list and select the new folder you just created. You can now print this blank calendar as described previously.

Chapter 24 Building a Contacts List



How to…

- Create a list of names, addresses, phone numbers, and Internet contact information
- Edit Contacts list entries
- Import an address book from Outlook Express
- Print your Contacts list

The Outlook Contacts folder is where you store the names, addresses, phone numbers, email addresses, and other pertinent information about the people with whom you do business. It can also contain the names, addresses, and email/web information for friends, family, and personal associations, including pictures of the individuals whose information you choose to store. Using the information you keep in your Contacts list, Outlook can add addresses to your email messages, flesh out your meeting requests, and provide a list of potential performers for tasks you assign. In addition to supporting vCards (the Internet standard for sharing virtual business cards), you can also use the Outlook Address Book as the source of data for a mail merge in Word—its uses are virtually unlimited.

TIP *If your recipient's email server is set up to filter out spam (junk) email, or if there's a firewall in place, your vCard may be stripped out of your message before it's delivered.*

Working with Contacts

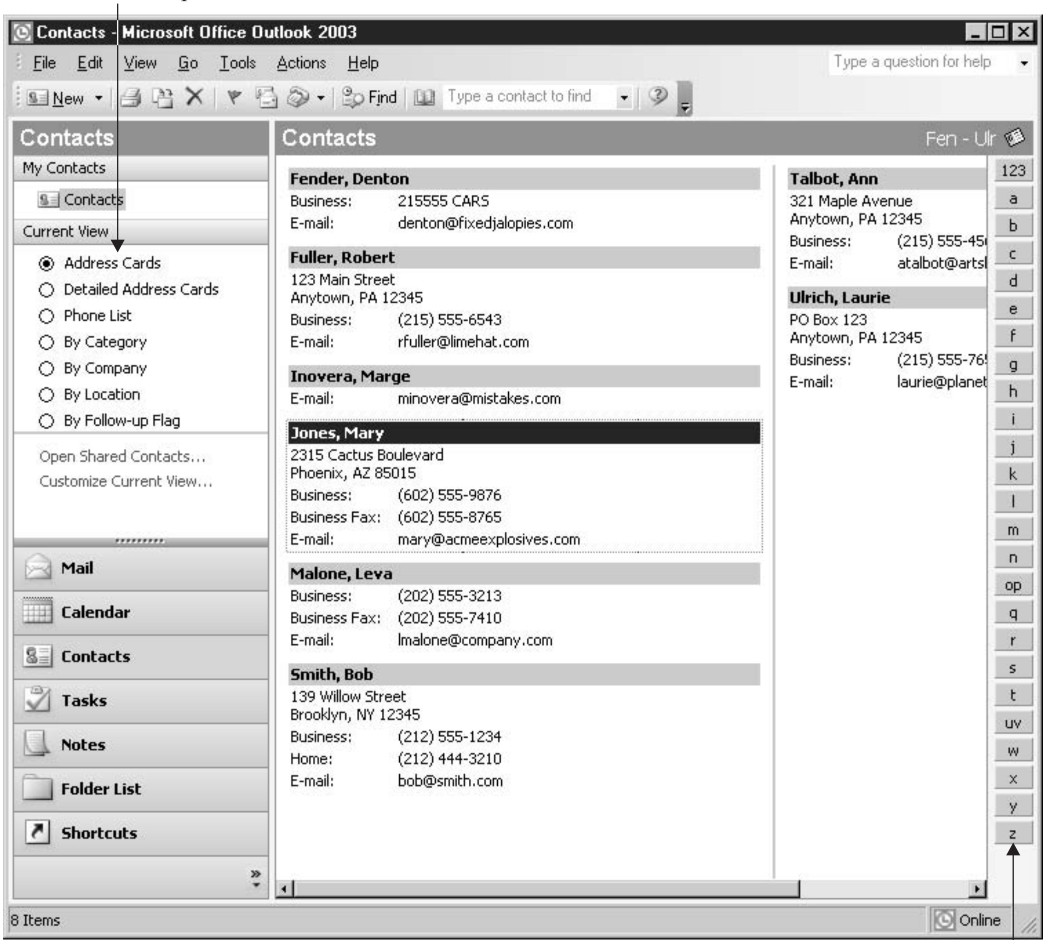
By clicking the Contacts icon on the Navigation pane, you can display your address book in the main Outlook window, as shown in Figure 24-1. You start out in Address Cards view, but you may prefer views that place your contacts in a particular order, such as by company name, rather than contact name. You can switch between views of your address book by choosing View | Current View, or by using the buttons in the task pane on the left side of the screen.

You can view your contacts in any way that facilitates your working style: by last name, first name, nickname, company, or any other classification that works for you.

The amount of possible information you can enter for a single account is enormous, including multiple addresses and phone numbers, detailed information such as birthdays and anniversaries, the name of the person's secretary, and as many personal notes and comments as you desire.

NOTE *New to Outlook 2003 is the ability to share your contacts. While you're in Contacts, click the Open Shared Contacts link in the Navigation pane and click the Name button in the resulting small dialog box. A list of your contacts appears, from which you can select those contacts you wish to share. Select them (with the* CTRL *key to make multiple selections) and then click OK. Once shared, the contacts can be viewed by those people to whom you've given access to your Outlook data, through your network. If you're unable to perform these steps, check with your network administrator to see about possible problems with your setup.*

Choose a view from this pane.



Click a letter of the alphabet to move to the first record starting with that letter.

FIGURE 24-1 The Address Cards view shows you all the information you've entered into each contact's fields.

Entering a New Contact

The Contact dialog box, shown in Figure 24-2, is potentially more useful than any pocket knife the Swiss Army ever came up with, providing more than 120 possible fields to record information about your contact. With three possible addresses, 20 telephone numbers, three email addresses, web page and Instant Messenger fields, and plenty of space to enter general

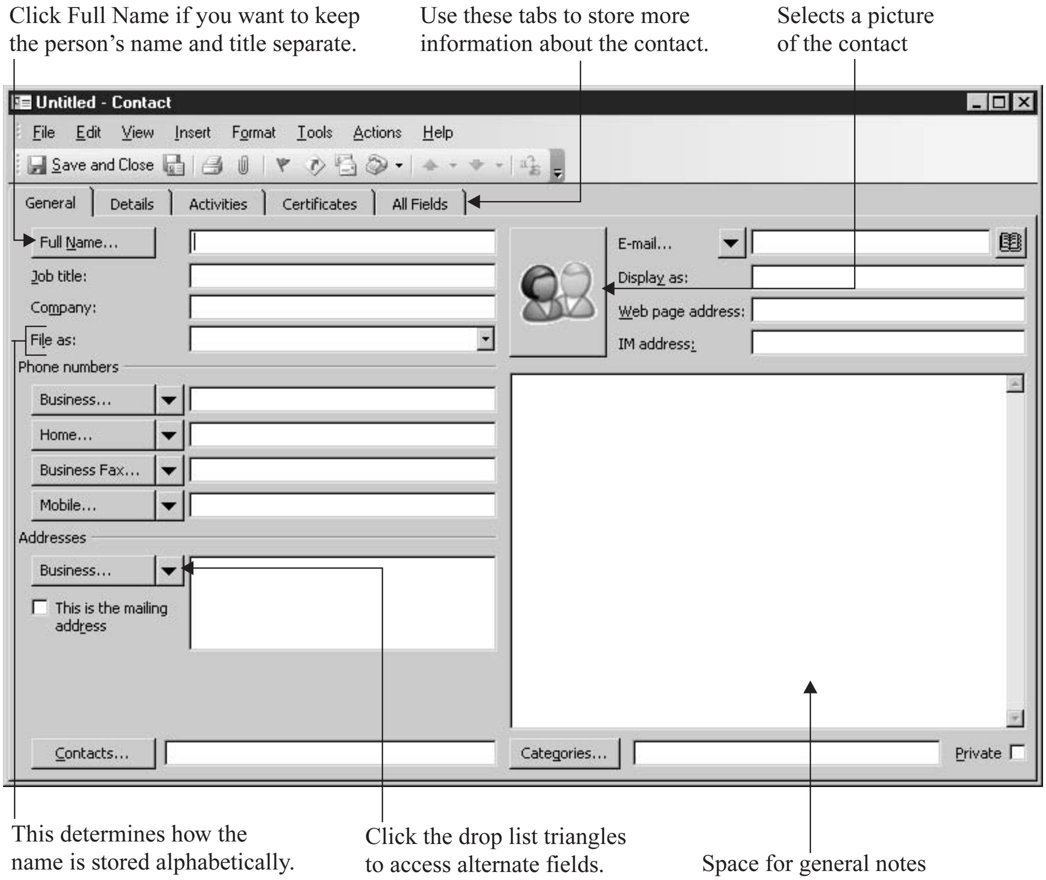


FIGURE 24-2 Build a contact record that contains virtually everything you know about a person or an organization.

notes, you can create an entire virtual dossier on anyone. Granted, only a handful of these fields are viewable from the General tab at any one time. You can, however, click the All Fields tab and then use the Select From drop list to browse through them all, divided by category.

To open a blank Contact dialog box and begin entering a new contact, use any of the following methods:

- Double-click in an open area of the Address Cards view.
- Right-click in the Address Cards view and select New Contact from the context menu.
- While in Address Cards view, click the New button on the toolbar.
- Choose File | New | Contact from the menu bar.

Once you're faced with an Untitled Contact dialog box, you can begin entering the record—enter a name (it doesn't matter if you enter first name or last name first, you'll have a choice later to file the entry by first or last name) and then press TAB to move to the next field. Before doing so, however, you can click the Full Name button to open a separate dialog box, which allows you to enter precise name information one field at a time. You'll also see Business, Home, Business Fax, and Mobile buttons next to the fields where you can enter those pieces of information—again, the buttons open dialog boxes for detailed entry. For most records, however, you'll just move through the fields with TAB, entering information into the fields that you care about or for which you have information—you may not, for example, know someone's mailing address if you've only ever spoken to him or her on the phone or exchanged email. You might not have multiple phone numbers for some people, or you might not know where a distant cousin or acquaintance works, so the Company field will remain blank.

TIP *If you only want to store someone's name and email address, just right-click his or her email address in a recent message from that person and choose Add to Contacts from the shortcut menu. A contact record will be created, with the information that's part of his or her email address—potentially, the person's name and email address, as in "Mary Smith <msmith@company.com>."*

Editing Contact Information

Outlook allows you to edit your contact information from any of the views available while within Contacts, whether you're in the default Address Cards view or any of the other possible views accessible from the View menu. Select the contact by clicking it once and then clicking the field you want to change, as shown in Figure 24-3. Once your cursor is blinking within the data, you can use BACKSPACE and DELETE to remove unwanted content and then type whatever you do want to appear in the field.

How to ... Import Your Address Book from Outlook Express

If you've been using Outlook Express for email prior to installing Office 2003, you can take your address book with you. In Outlook 2003, choose File | Import and Export, which opens the Import and Export Wizard. Choose Import Internet Mail and Addresses and then click Next. Choose your current version of Outlook in the next step of the wizard and then choose whether or not to import both your mail and your address book—you can choose one or both. Click Next, and the import begins. In the end, you'll see your Outlook Express address book entries appear in the current Outlook 2003 Contacts view, and you can use and edit the addresses as you would those you enter manually.

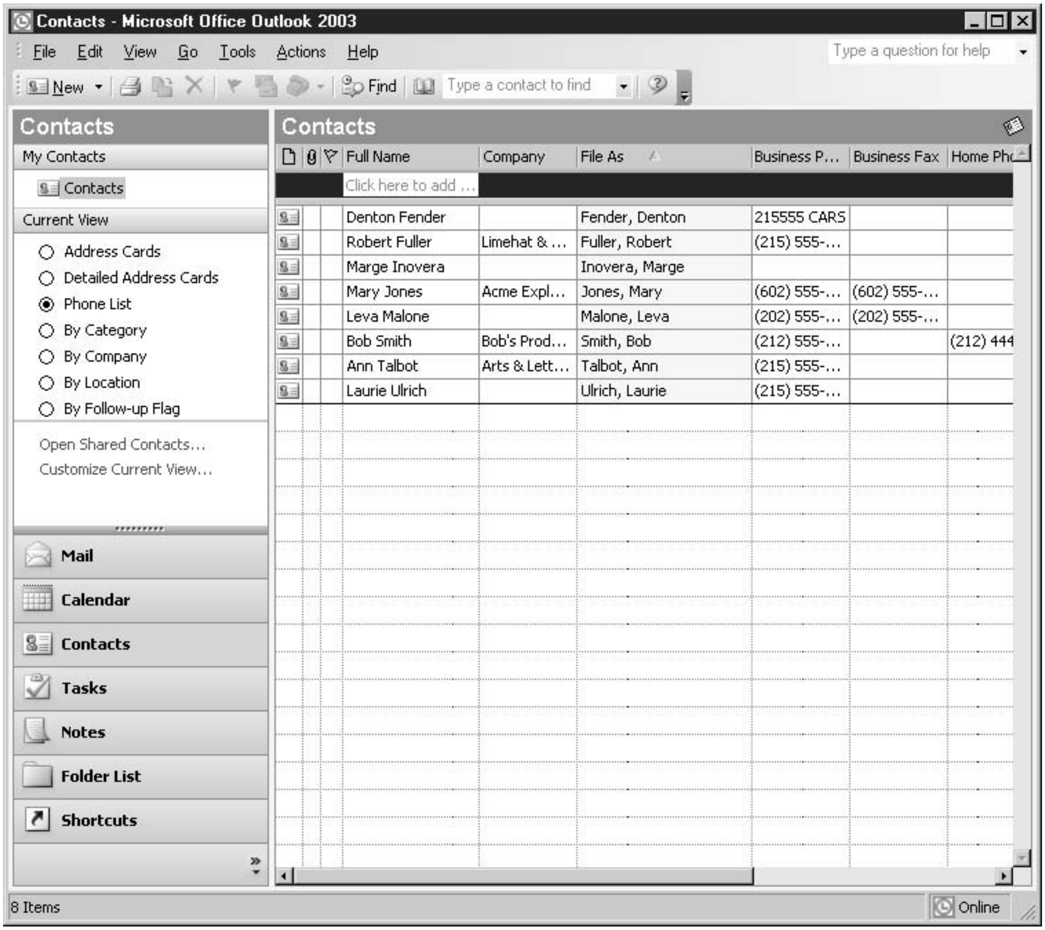


FIGURE 24-3 The Phone List view, as selected from the View menu. Simply click one of the fields and update the information to edit the contact.

Of course, you can also open the contact in the Contact window and make any changes there as well. To reopen the Contact window for any contact in the address book, just double-click the record name in the current view, and the window opens. You can also right-click the record (on any of the displayed data) and choose Open from the shortcut menu.

TIP

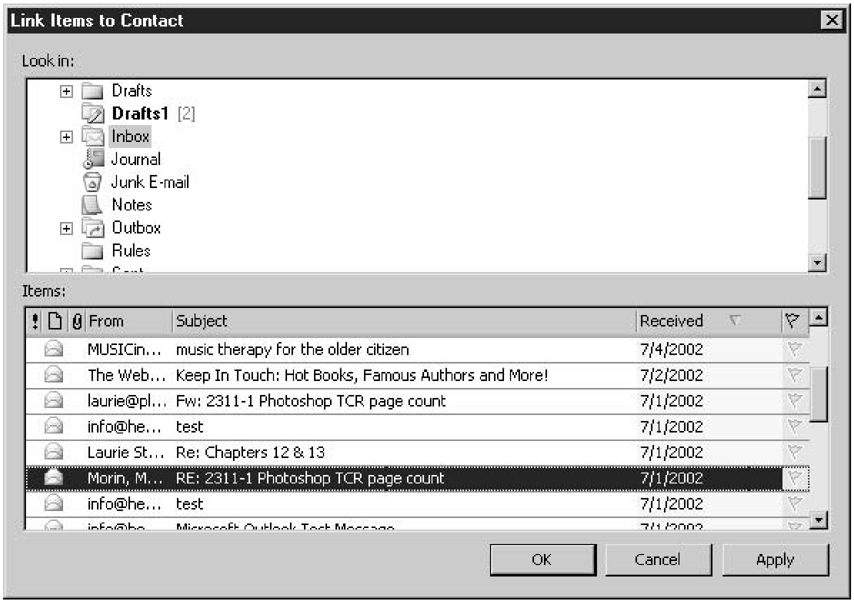
Deleting records is almost too easy. Simply select the contact in any of Outlook's possible views and either press DELETE *to send it to the Deleted items folder or right-click the contact and choose Delete from the context menu. You can also click the X (Delete) button on the toolbar while the record is selected.*

Contact Tracking

The Activities tab of the Contact dialog box allows you to see all email messages, appointments, tasks, notes, and documents related to that contact. You tie these items to a contact via links. Outlook will automatically create links when you send or receive email messages, schedule meetings, or assign tasks involving someone on your Contacts list. You can manually link contacts to Outlook items and other Office documents using any of the following methods.

Linking a Contact to a Preexisting Outlook Item

Open the contact to which you want to link an item, and select Actions | Link | Items from the menu bar. This displays the Link Items to Contact dialog box, shown next.



Use the Look In field to select the folder you want to look in, and use the Items field to choose the specific Outlook items you want linked to this contact.

Linking a Contact to New Items

When composing a new message, click the Options button on the message window's toolbar and then click the Contacts button at the bottom of the Message Options dialog box. When creating appointments, meetings, and event items, simply use the Contacts button located at the bottom of their input windows.

Linking a Document to a Contact

Just like linking a contact to a preexisting Outlook item, open the contact to which you want to link a document, select Actions | Link, but then choose File from the menu bar. This opens a standard Choose a File dialog box from which to locate a file on your hard drive.

Printing Your Contacts List

You can print out your contacts in much the same way you print out a calendar. You can print your entire Contacts list or print only a subsection—for example, if you're going out of town and only need the contacts for a specific city.

To print your entire Contacts list, switch to Address Cards view, as this provides the most print style options, and then choose File | Print from the menu bar. You can also press CTRL-P on your keyboard. In the Print dialog box, select the style you prefer in the Print Style area (see Figure 24-4) and then click OK. You may want to use the Preview button first to get an idea how your printout will look.

If you only want to print a selection of contacts, go to the View menu and choose Current View | Customize Current View. In the View Summary dialog box, click the Filters button. In the resulting dialog box, shown next, use the available fields to narrow your contacts down to the ones you want. You could use the Search for the Word(s) field and enter the name of a city, or you could use the Email button to pick out individuals from your Contacts list. Use in In field

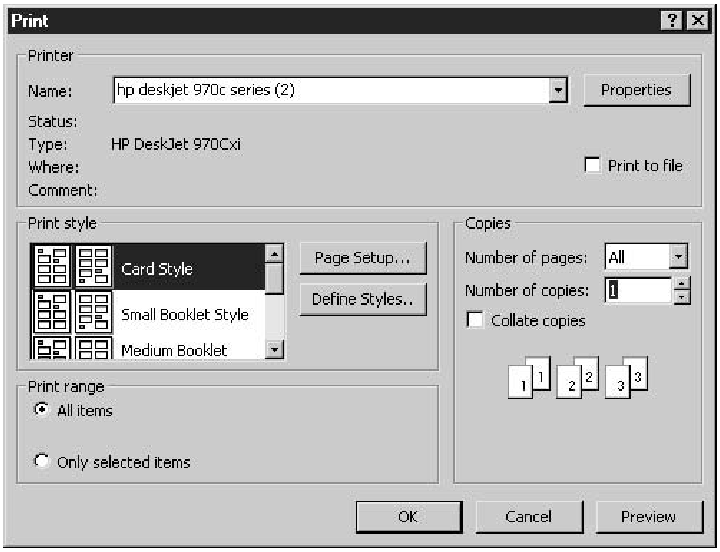


FIGURE 24-4 Choose the desired style for your printout of the Contacts list.

to choose which fields to search for that criteria. Once you've customized the view to only include the contacts you want to print, follow the preceding steps to print them out. You'll probably want to reset the current view back to how it was originally when you are done. You can do this by going through the same procedure and using the Clear All button at the bottom of the Filter dialog box.