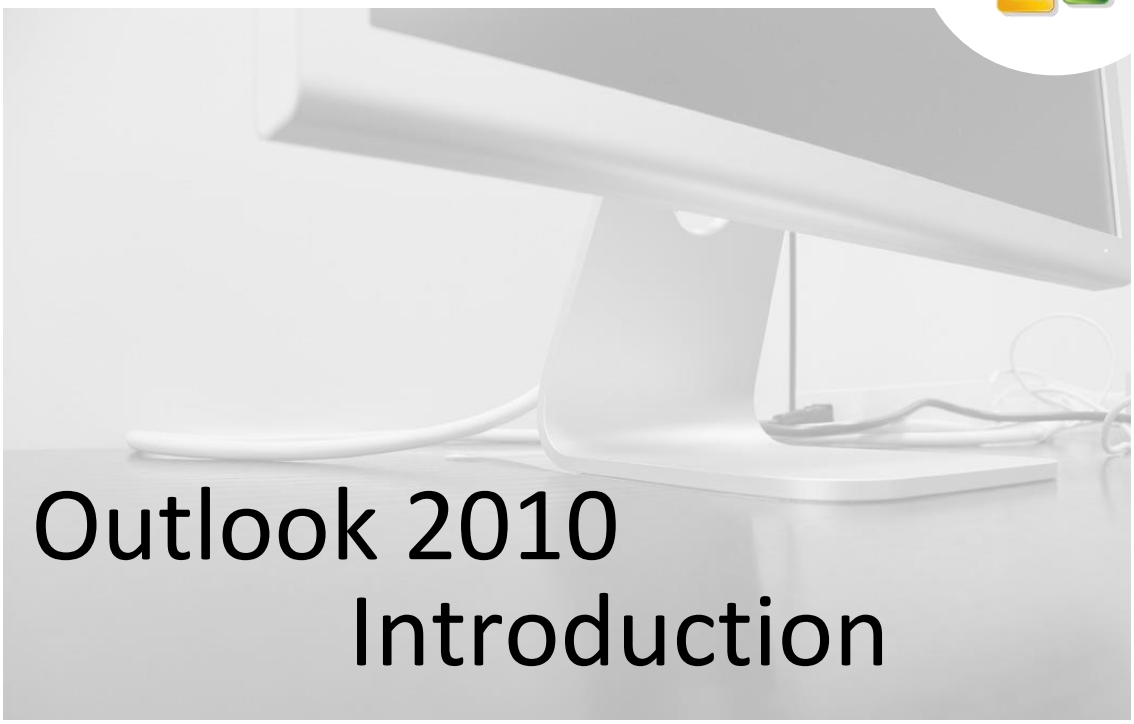
Microsoft Application Series



Outlook 2010 Introduction

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Contents

Quick reference: Outlook shortcut keys

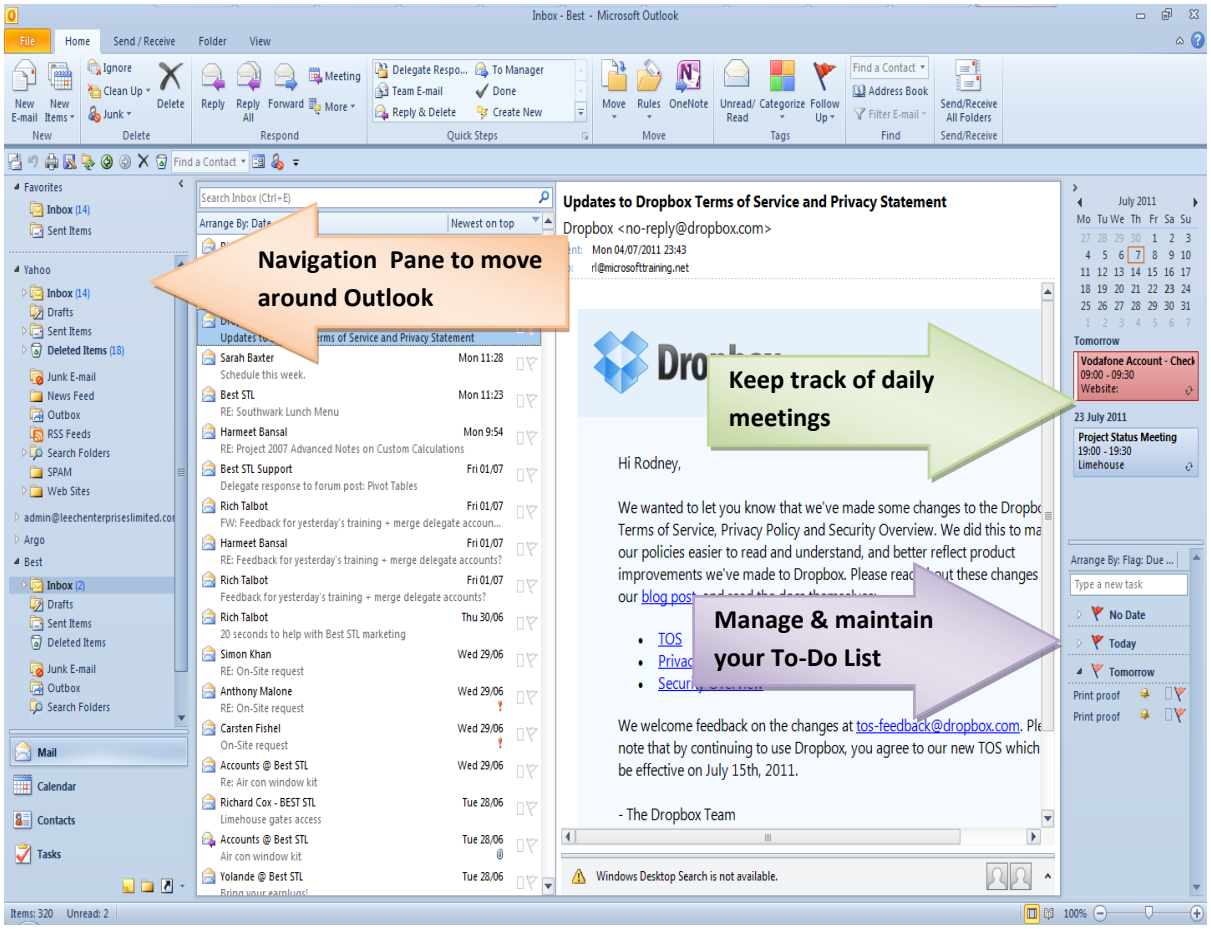
Command	Keystroke
Advanced Find	Ctrl-Shift-F
Check for new mail	F5
Close a window	Esc
Create Appointment	Ctrl-Shift-A
Create Contact	Ctrl-Shift-C
Create Flag for follow-up	Ctrl-Shift-G
Create Folder	Ctrl-Shift-E
Create Meeting Request	Ctrl-Shift-Q
Create Message	Ctrl-Shift-M
Create Note	Ctrl-Shift-N
Create Task	Ctrl-Shift-K
Create Task Request	Ctrl-Shift-U
Delete opened item	Ctrl-D
Forward selected mail	Ctrl-F
Mark item as read	Ctrl-Q
Move down one screen	PgDn
Move to first item	Home
Move to last item	End
Move up one screen	PgUp
Create new default item	Ctrl-N
Open “Find a Contact”	F11
Open folder	Ctrl-Y
Open “Look In”	Alt-I
Open selected item	Enter
Redo (in text field)	Ctrl-Y
Remove last semi-colon from mail addressee	Alt-K
Reply to selected message	Ctrl-R
Select all items	Ctrl-A
Select to first item	Ctrl-Shift-Home
Select to last item	Ctrl-Shift-End
Spell check open item	F7
Switch to Inbox	Ctrl-Shift-I
Switch to Outbox	Ctrl-Shift-O
Undo	Ctrl-Z

Introduction and Overview of Outlook 2010

Outlook provides an **integrated solution for managing your time and information**. It can make it easier to prioritise and control your time, so that you can focus on the things that matter most.

Outlook is much more than an electronic mailbox

Office Outlook 2010 delivers innovations you can use to quickly **search your communications, organise your work and share information with others – all from one place.**

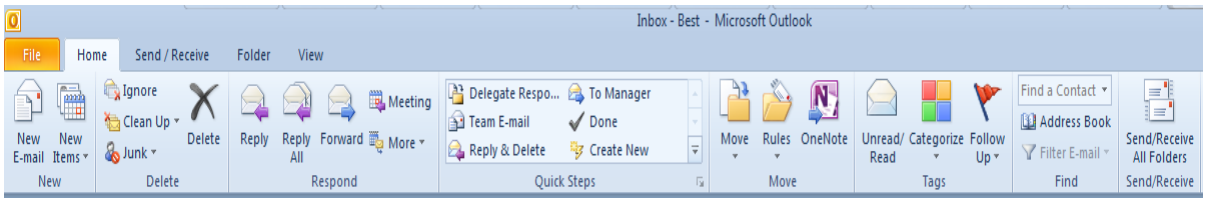


New Features and Capabilities

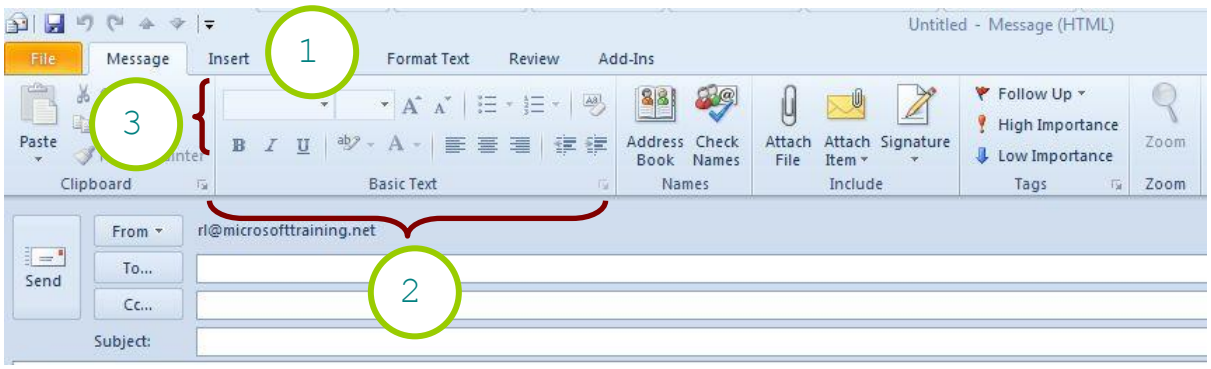
The Ribbon was introduced in Office 2007 and remains in Office 2010. The Ribbon has been designed to replace the old menu system and is more intuitive i.e. commands are now where you would expect to find them.

One of the most dramatic changes in Outlook, the Ribbon gives Outlook a new look. In Outlook 2007, not all areas used the ribbon only newly created items or edited items. However, in Outlook 2010, the ribbon interface was added to the main Outlook area as well.

The Ribbon View



A Closer Look At the Ribbon



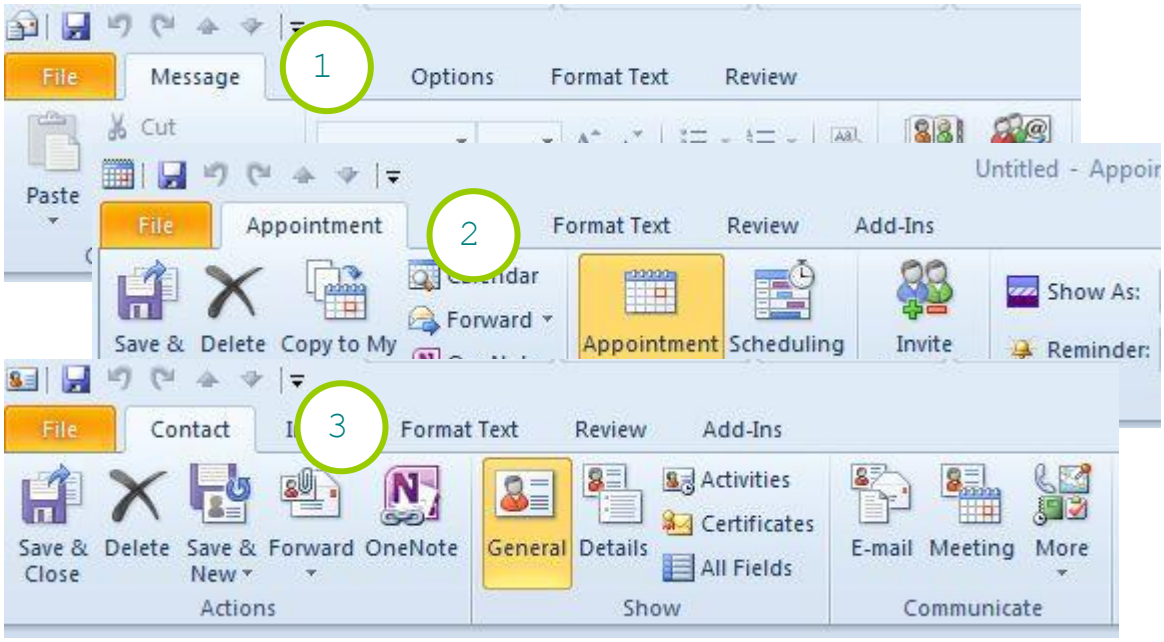
To better help you learn how to use the Ribbon - its basic arrangement:

1. **Tabs** The Ribbon is made up of different tabs. Here we've shown the **Message** tab. Each tab is related to specific kinds of work that you do in Outlook. On the tabs are the commands and buttons that you've used before.

2. **Groups** Each tab has several groups that show related items together. **Basic Text** is a group.

3. **Commands** The **Bold** button and the **Font** list are commands. A command is a button, a box to enter information, or a menu. The most commonly used commands, such as the **Paste** command, have the largest buttons most of which have a drop-down option.

The Ribbon Shows What You Need

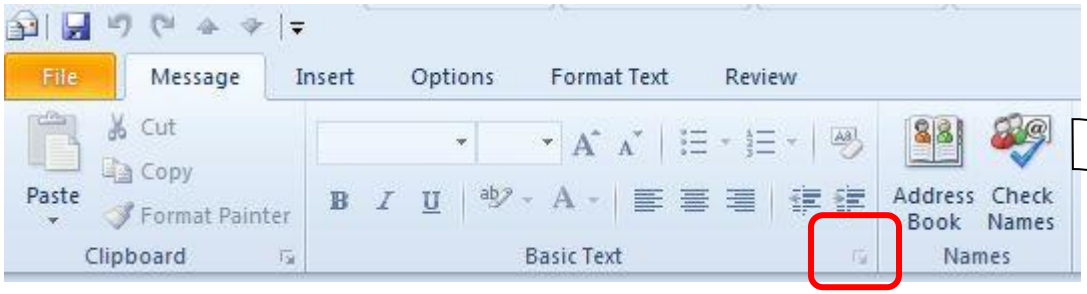


As mentioned earlier, you'll encounter the Ribbon when you take certain actions like creating messages, calendar entries, or contacts (to name just a few things you might do in Outlook).

The Ribbon shows tabs and commands appropriate for what you're doing. That is, the **tabs on the Ribbon will differ depending on the area of Outlook you're working in**. We've shown some of these differences in the picture:

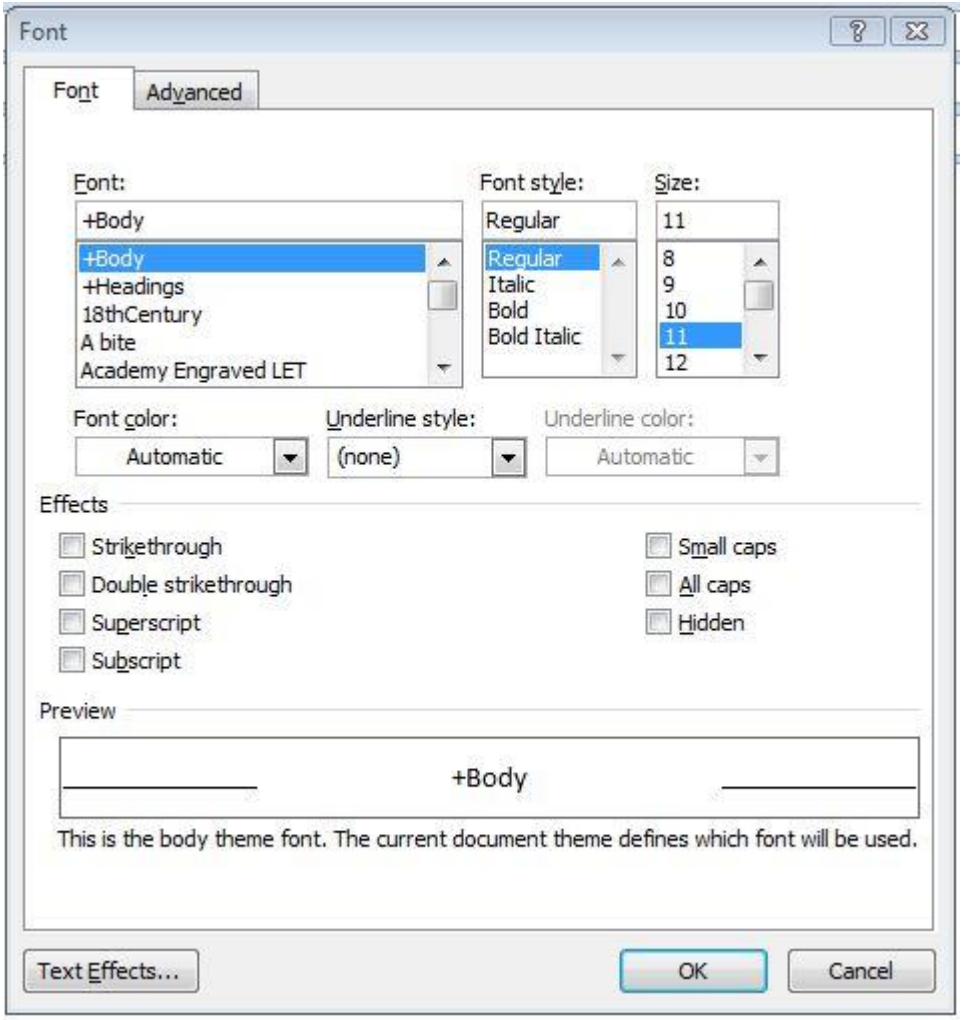
1. A new message shows the **Message** and **Options** tabs with groups and commands that you'll use when you write and send a message.
2. A new appointment shows an **Appointment** tab with groups and commands specific to working with a calendar entry.
3. A new contact shows a **Contact** tab with groups and commands to help you keep contact information up to date.

The Dialogue Box Launcher



A small arrow at the bottom right hand side of a group, known as a dialogue box launcher, means there's more available than what you see.

For example, to see the full list of font options, you would click the arrow next to the Basic Text group on the Message tab of a new e-mail message.

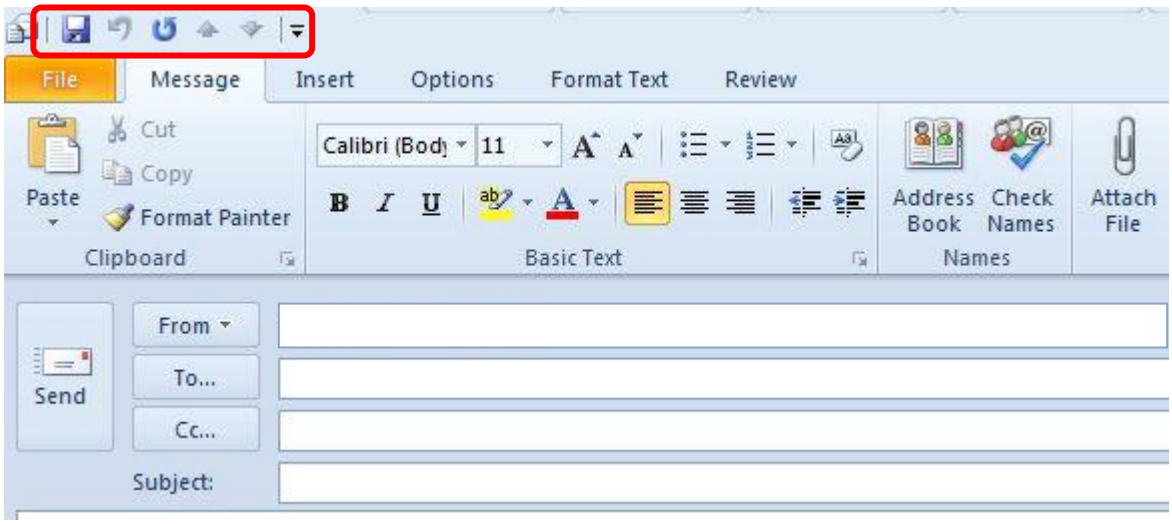


The Mini Toolbar

The **Mini toolbar** allows you to quickly access formatting commands right where you need them: in the body of an e-mail message.

1. Select your text by dragging with your mouse, and then point at the selection.
2. The Mini toolbar appears in a faded fashion. If you point to it, it becomes solid, and you can click a formatting option.

The Quick Access Toolbar

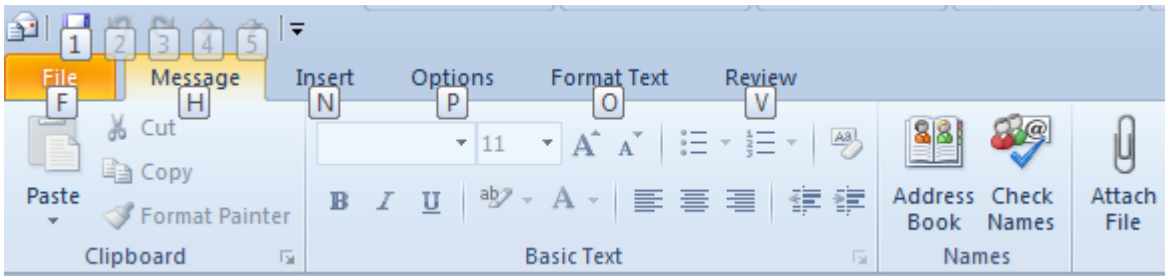


The **Quick Access Toolbar** is a small toolbar above the Ribbon. It's there to make the commands you need and use most often readily available.

What's best about the Quick Access Toolbar? What's on it is up to you. That is, you can add your favourite commands to it with a simple right-click.

You'll see and use different Quick Access Toolbars depending on the area of Outlook that you're working in. For example, customizations that you make to the Quick Access Toolbar for messages you send will not appear on the Quick Access Toolbar for Contacts.

Keyboard Shortcuts

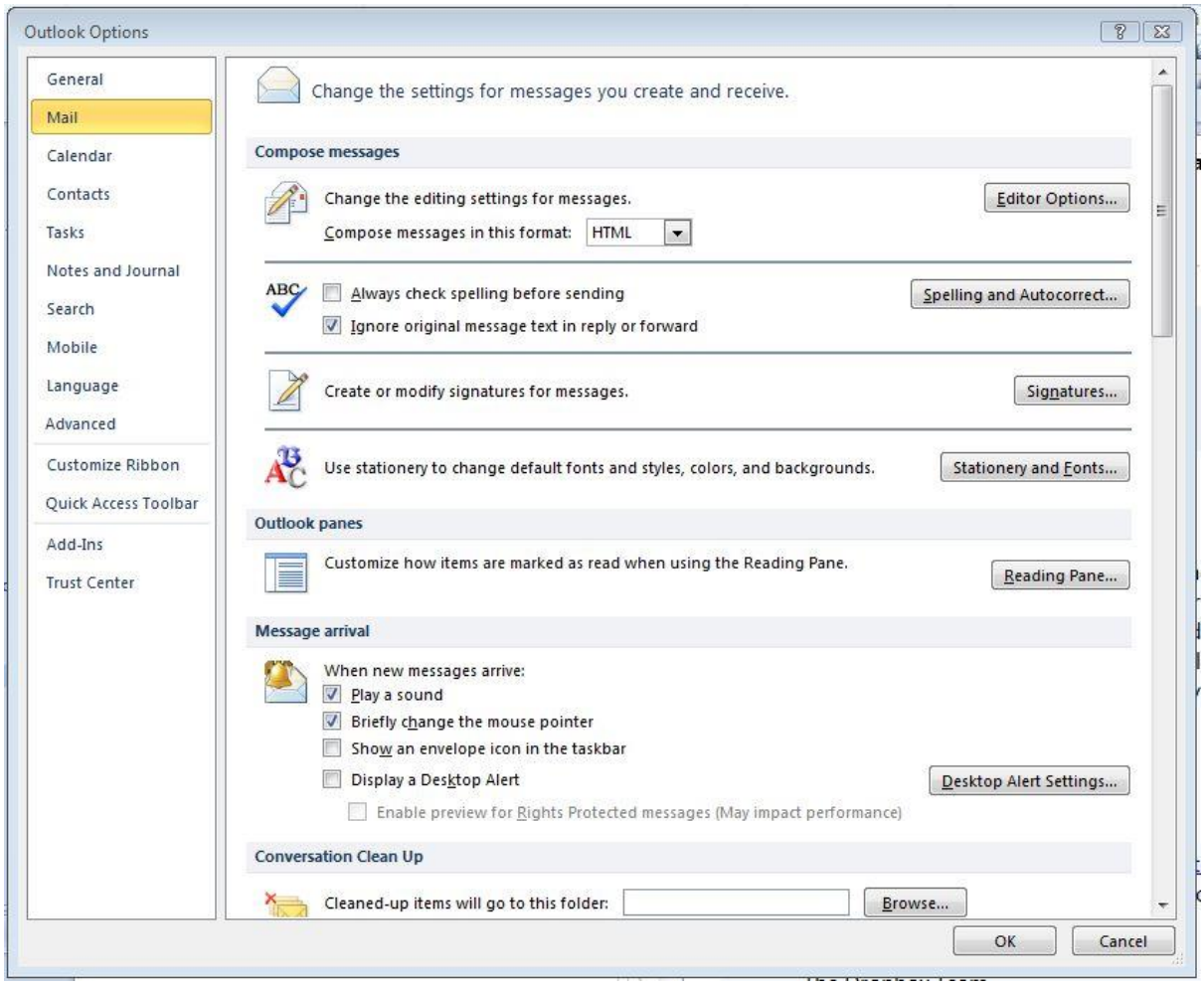


Press ALT to see the keyboard shortcuts. Press the indicated key to show the correct tab, and then press the letter to access the command you want.

Know Your Options

Outlook provides many options to help you change how things look and work.

All option settings are found in the 'Backstage' area, which can be accessed through the **File** tab. Click **File**, then **Options** to open the dialogue area from which you can choose the option that you wish to change: -



Options for Writing E-Mail

If you want to change your settings for writing e-mail — for example, to make the spelling checker stop ignoring words in uppercase — you do that from the Editor Options dialog box. You start by creating a new message, and then:

1. Click the File tab then Options (defaults to the Mail Section.)
2. Click Editor Options.

Options for Sending E-Mail

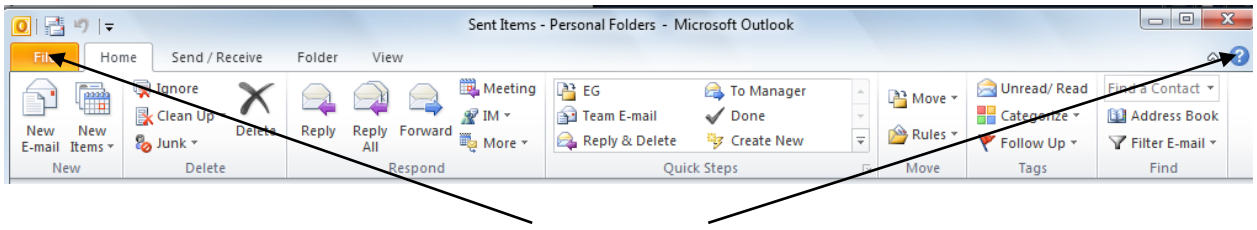
When you send an e-mail message, **you can make choices about how that message is sent**. For example, you can choose whether the outgoing message is formatted in Plain Text, HTML, or Rich Text. You can also change where you keep a copy of a particular sent message (or you can specify whether you keep a copy of it at all). You'll set these types of options from tabs available on the Ribbon for that message.

The Help System

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

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

Using Outlook Help



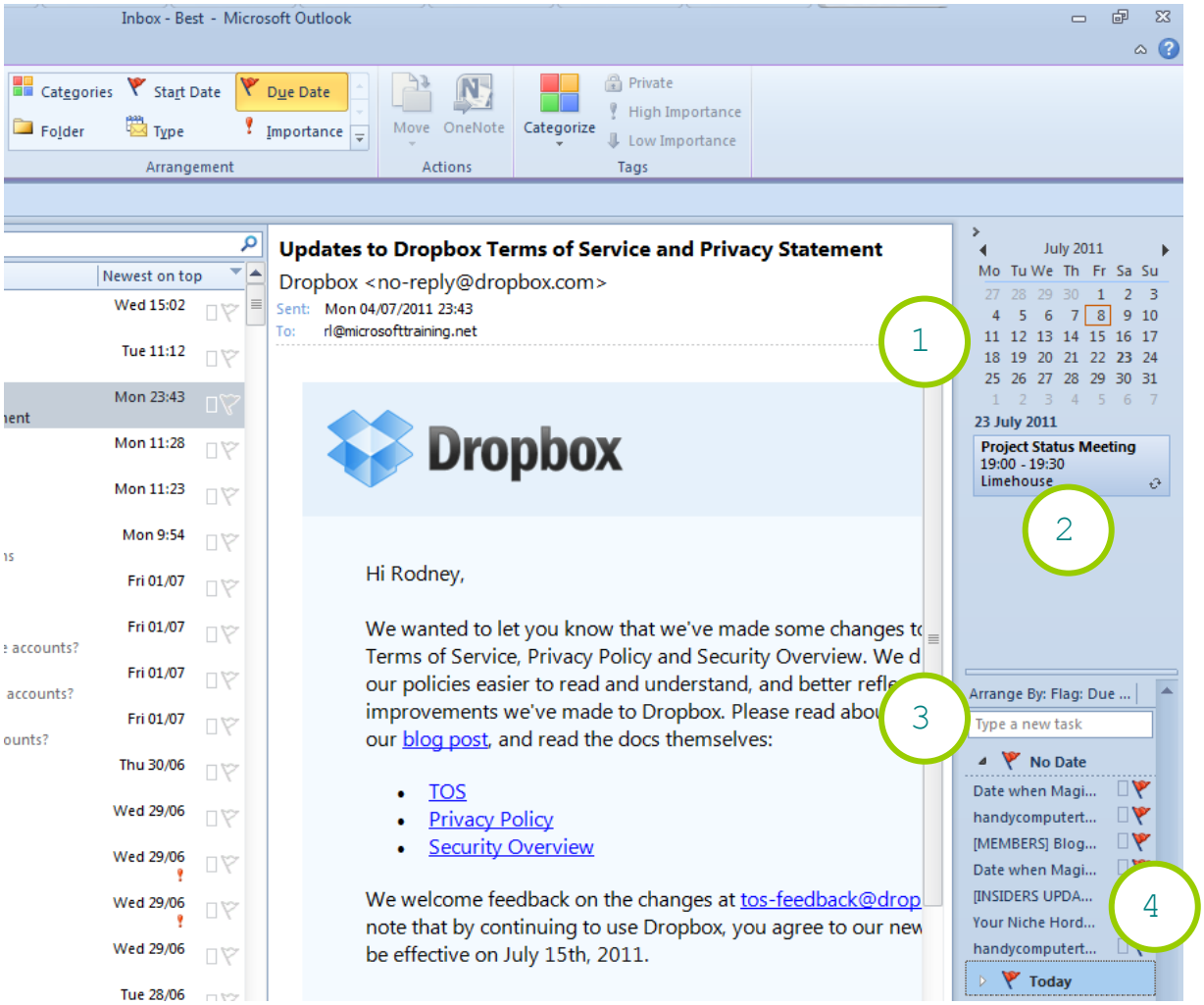
Access help here

As shown above, in the top right hand corner of the screen you can click on the Question Mark or in the top left hand corner by using the File tab you can open a menu where you can click the help link giving you an overview of what is available in help.

To use Outlook Help:

1. Click the question mark icon to open the help function
2. When help opens you can click through the topics listed or use the search command.
3. Type your query into the “Type words for search for” box
4. Select an appropriate article from the displayed help topics.

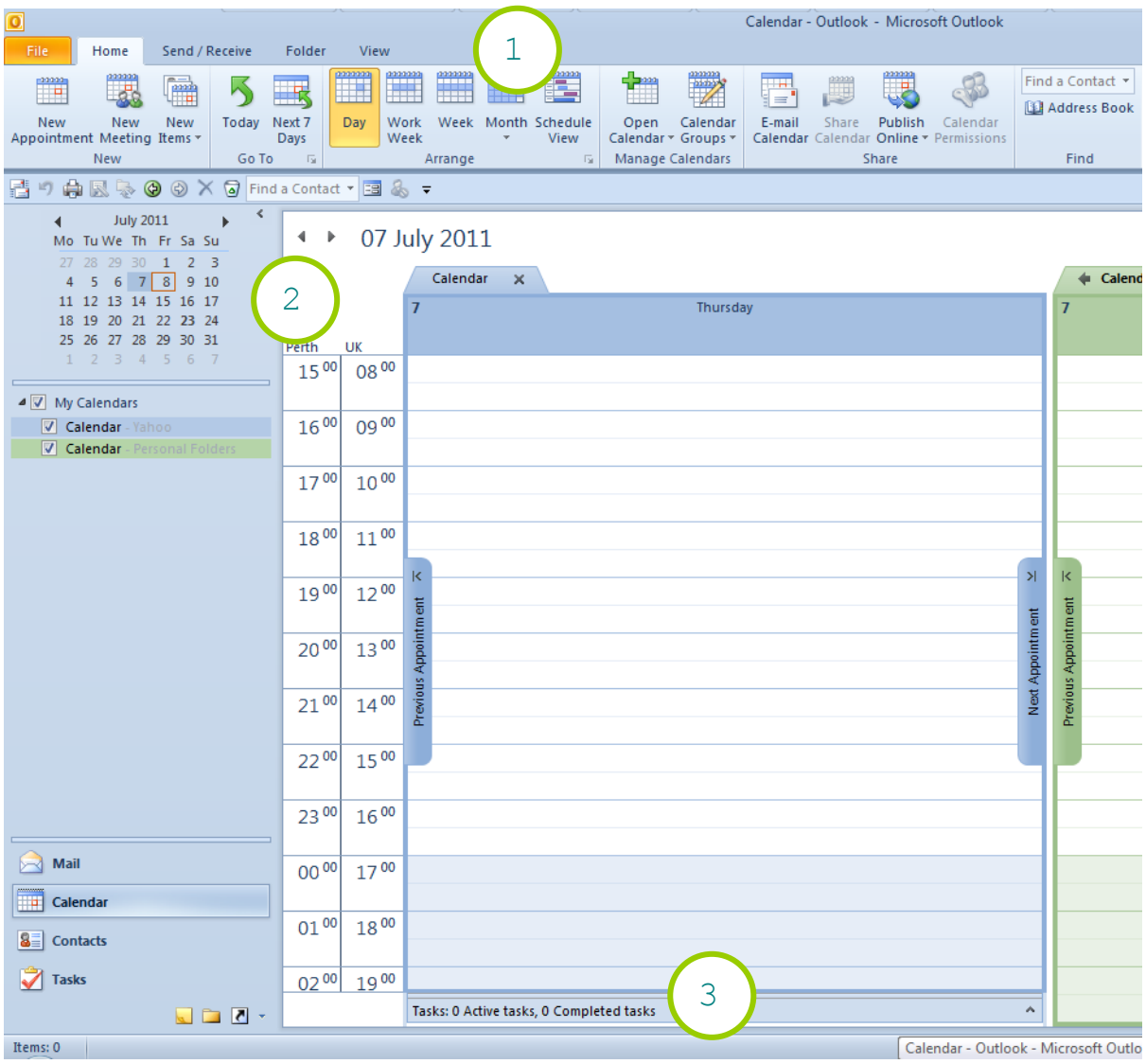
The To-Do Bar



Located at the far right of the window, the **To-Do Bar is visible wherever you happen to be working in Outlook** (that is, you can see it from Mail, Calendar, Contacts, and so on). The To-Do Bar is there to help you **keep track of upcoming tasks and appointments**. In the picture, we've called out a few of its key elements:

1. Date Navigator.
2. Upcoming calendar appointments.
3. A place to enter new tasks by typing.
4. Your task list.

A New Look For the Calendar



We hope that when you look at the new design of the calendar in Outlook 2010 you'll instantly notice that it's **easier to see what's what**. Moving around is easier too. Here are some examples:

1. **Bigger buttons** make it easier to quickly switch between daily, weekly, and monthly calendar views.

2. **Back** and **Forward** buttons let you quickly go to the next day, week, or month in the calendar.

3. Also new is a **Tasks** area. You can use this area to track your accomplishments: Completed items on this list appear crossed out and "stick" to the day; tasks not marked as complete will automatically be carried over to the next day, until you complete them.

A New Look for Contacts

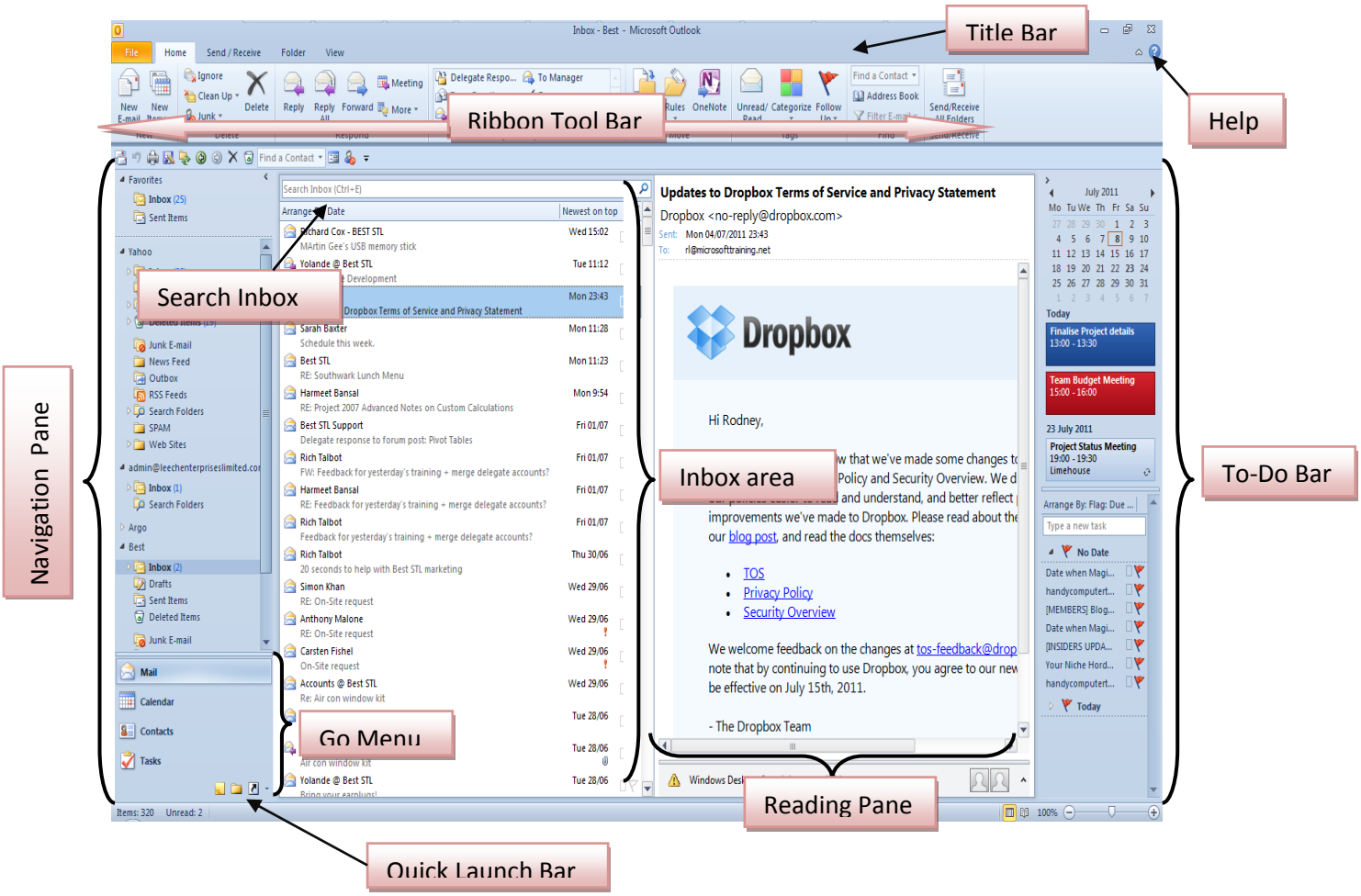
In Outlook 2010, **Electronic Business Cards** make contacts easy to view and easy to share. You'll first notice the new look for contacts when you click Contacts to switch to that area of Outlook.

You can **send Electronic Business Cards through e-mail**. You might want to include your own Electronic Business Card as part of your e-mail signature.

Tip Notice also that in this picture the **Navigation Pane** is minimized to show more of the **Contacts** pane. You can minimize the **Navigation Pane** from any area of Outlook by clicking the **Minimize the Navigation Pane** button.

Unit 1 - Getting Started

The Outlook Environment



Title Bar	Displays the name of the application and the name of the current folder.
Ribbon Toolbar	Displays available ribbons
Help Button	Provides help using Microsoft Office online
Navigation Pane	The column to the left side of the window that provides access to all components of Outlook
Go Menu	Part of the Navigation Pane that allows you to quickly switch between components.
Quick Launch Bar	Part of the Navigation Pane that provides access to frequently used components.
Reading Pane	Displays the contents of the selected messages without having to open the message.
Item	An item is a basic element created in Outlook that holds information and is stored in a specific location.

Items in Outlook include:

- *Messages*
- *Appointments*
- *Meetings*
- *Contacts*
- *Tasks*
- *Notes*

Folder	A folder is a container that you can use to store and organise Outlook items.

Outlook contains six main components that you can use to communicate with others. These components are folders.

Inbox	Where you send and receive messages.
Calendar	Where you schedule appointments, meetings and events.
Contacts	Where you enter and track business and personal contacts
Task	Where you create and manage tasks
Journal	Where you can automatically track all items that you have specified as they occur.

Additional Folders in Outlook Include:

Deleted Items	Stores any items that you delete in Outlook.
Drafts	Stores copies of unfinished messages you can complete and send at a later time.
Junk E-Mail	Contains junk email messages
Outbox	Temporarily stores messages you send until they are delivered.
Sent Items	Stores copies of messages you send to others.
Sync Issues	Contains all of the synchronisation logs
Search Folders	Contains views of all mail items that satisfy specific search criteria.

Compose and Send a Simple Message

You need to send some important information to a client who is located in another part of the country. The client needs the information today. Sending it by regular mail is not an option. The client is out of the office, so you can't call either.

By using Outlook you can quickly and efficiently send the information in a simple message.

E-MAIL

Electronic mail, or E-Mail, is an application that allows a user to create, send and receive electronic messages. **You can send information and receive information from users within your network of computers or outside your network of computers via the internet.**

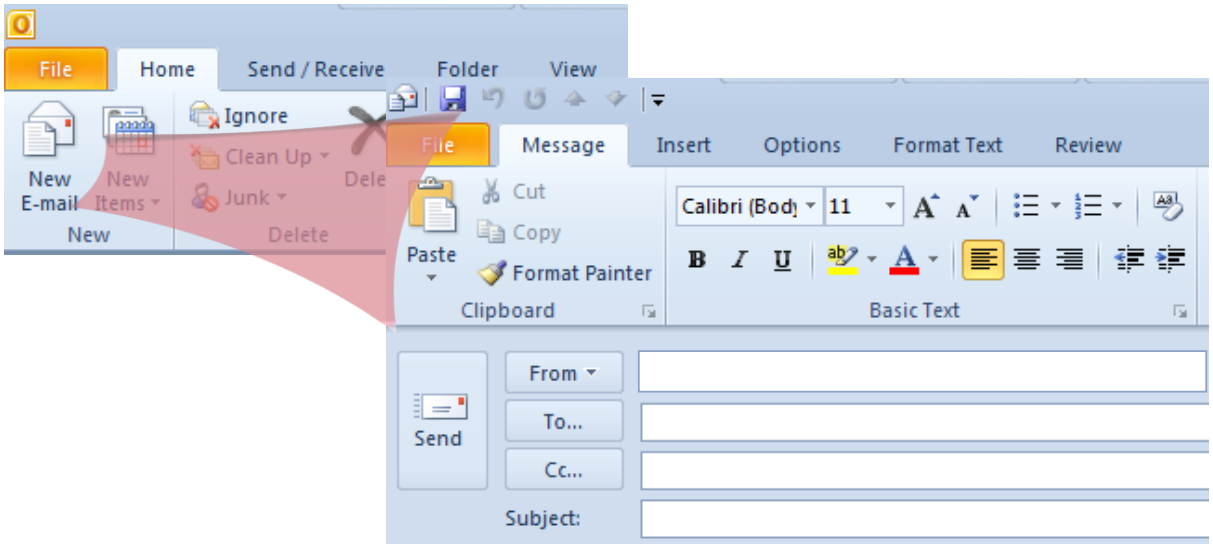
The Message Form

When you **create a new message using the 'New E-mail' button or Ctrl + N**, Outlook displays a message form that contains text boxes in which you can enter specific information.

In the new message, you'll need to **get oriented to the Ribbon**. You'll see the Message tab on top, which contains the commands and buttons that you're most likely to use every time you create and send a message.

If you're having **trouble finding a command or a button, you may need to look on another tab**. For example, to insert a picture so that it appears in line with the text of your message, (not as a separate attachment), you'll need to switch to the Insert tab.

> **Note** This isn't completely new, but it's something to be aware of:
>
> Certain groups and buttons will be available only when the insertion point is in the body of the e-mail message. For example, formatting commands on the **Basic Text** group won't be available when the insertion point is in the **To...** field or the **Subject:** field; to use those commands, you need to move the insertion point to the body of the message.



To...	Email address or user name of the person to whom you want to send the message.
Cc...	E-Mail address or user name of anyone who you want to send a copy of the message (carbon copy) to.
Subject:	A brief description of the message
Message Body	The text of the message

Default Mail Editor

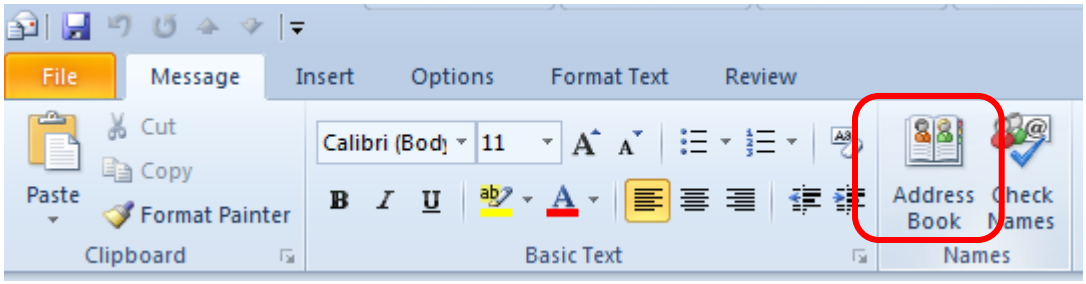
Microsoft Word is the default mail editor for Outlook. Therefore, when you create mail messages you will have access to a number of Word features, making it easier to create messages in Outlook.

E-Mail Etiquette

Net etiquette or **Network etiquette** is a set of guidelines for ethical behaviour on the internet, including sending and receiving e-mail. You can become a responsible internet user by applying the simple guidelines to your own e-mail activity:

- **Think twice before clicking the 'Send' button.**
  - Once you send an e-mail, you might not be able to take it back.
  - Realise that an e-mail message can be easily circulated (forward, print and distributed)
- **Be cautious with humour and sarcasm**
  - Statements that are funny person to person might lose their humour in writing and appear, instead, confusing or even vicious.
- **Use CAPITAL LETTERS sensibly.**
  - Statements in Capitals can suggest you are shouting at the reader. It may also be used to highlight important points.

Use the Address Book to Add Recipients



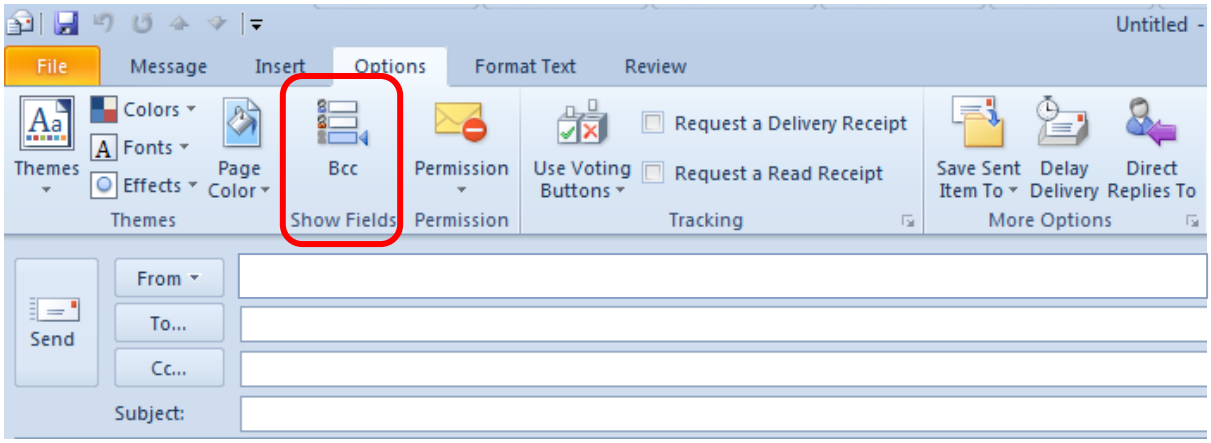
You'll find the Address Book command on the Message tab, OR Click the 'To' button (below the ribbon.)

The Address book is a collection of address books or address lists that you can use to find and select names, email addresses and distribution lists to quickly address messages.

Global Address List

The Global Address List is **a list of all user names and global distribution lists in a particular organisation that is created and maintained by the Microsoft Exchange Server Administrator.** *You can only access the Global Address List if you are using a Microsoft Exchange Server email account.*

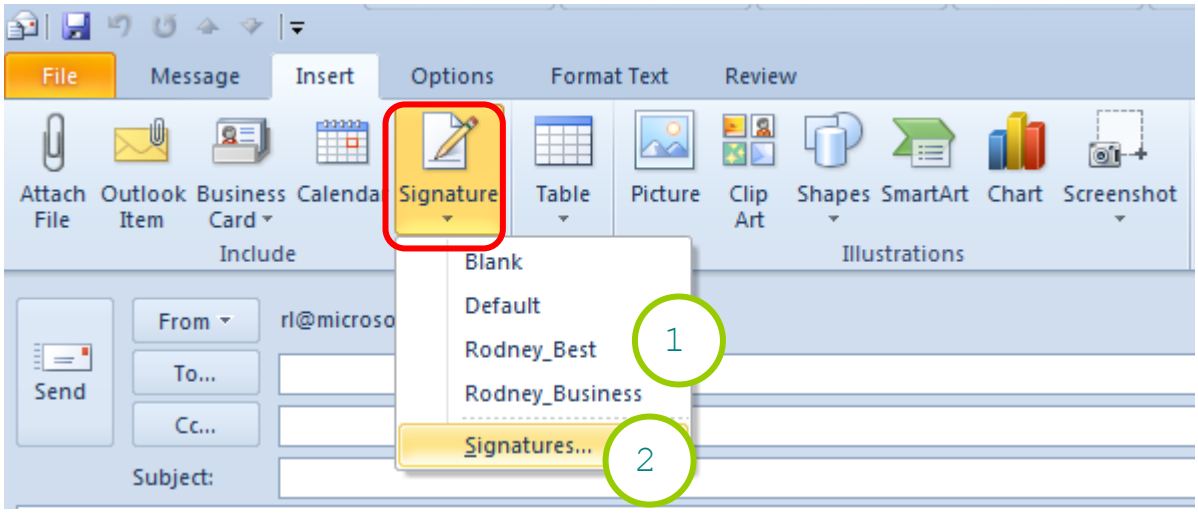
Show or hide the Bcc field



If you prefer to type e-mail addresses directly in the To and Cc boxes, you may also want to know how you can show the Bcc (blind carbon copy) field so that you can type names there, too. **(You can use Bcc to send messages without exposing the names of the recipients to each other — it's one way to respect the privacy of the people to whom you're sending e-mail.)**

You will find the 'Show Bcc' command under the 'Options' tab.

Include Your Signature



You can **modify existing signatures or create new ones, as well as set a default signature**, by clicking the arrow under the Signature command which is located in the Include group on the Message tab or on the Insert tab.

1. If you created signatures previously, you'll see them listed here.
2. To create new signatures, set a default signature, or modify existing signatures, click Signatures...

Format a Message

You need to send a message that contains important dates and times for some upcoming events. You want to make sure that the dates and times stand out in the message text. **By formatting specific text in a message, you will emphasise that text, drawing the reader's attention to it.**

Select the text that you want to emphasise. (To select all the message text, press Ctrl +A)

Apply the format

Under the 'Message' tab in the 'Basic Text' group you can find most of the formatting tools required.

Save Message

While composing a message, you might decide that you are not ready to send the message. You can **save a message and send it at a later time** by clicking on the **Save Button** on the **Quick Access toolbar** or click the **File Tab** and click **Save.**

The message is **stored in the 'Drafts' folder**. When you're ready to finish the message, simply select it from the drafts folder and continue.

Checking Spelling and Grammar

Whenever you're typing, there's always the possibility of making an error. For example you know the correct spelling of the word "their", but you type it as "thier"

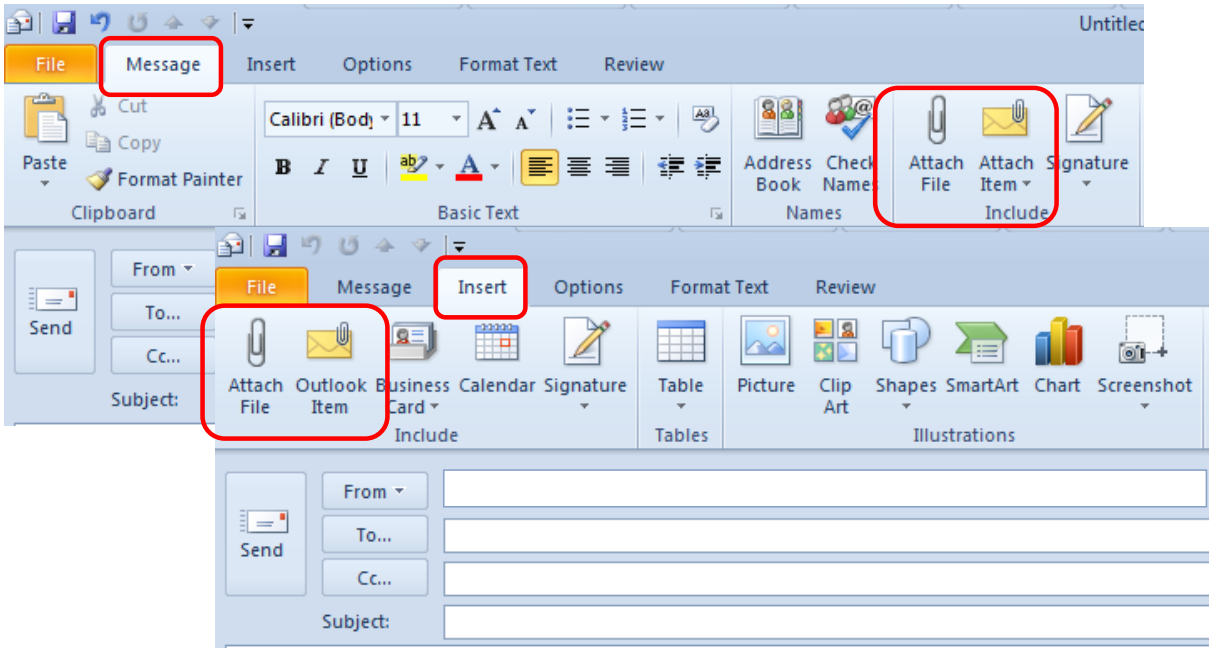
When you are trying to convey a professional image, misspelled words and incorrect grammar can make you look unprofessional.

AutoCorrect

The AutoCorrect feature **detects common typing mistakes**, including misspelled words, grammar problems, incorrect capitalisation and common typos. AutoCorrect brings them to your attention. By **default, the AutoCorrect feature is on**.

Attach a File

You have some **information in a separate file that you want to include in a message**. Re-typing that information in the message will take some time. You can't copy and paste the information because it's in a different format. By **attaching the file to your message you can include the additional information without wasting time**.



Where you'll find Attach File

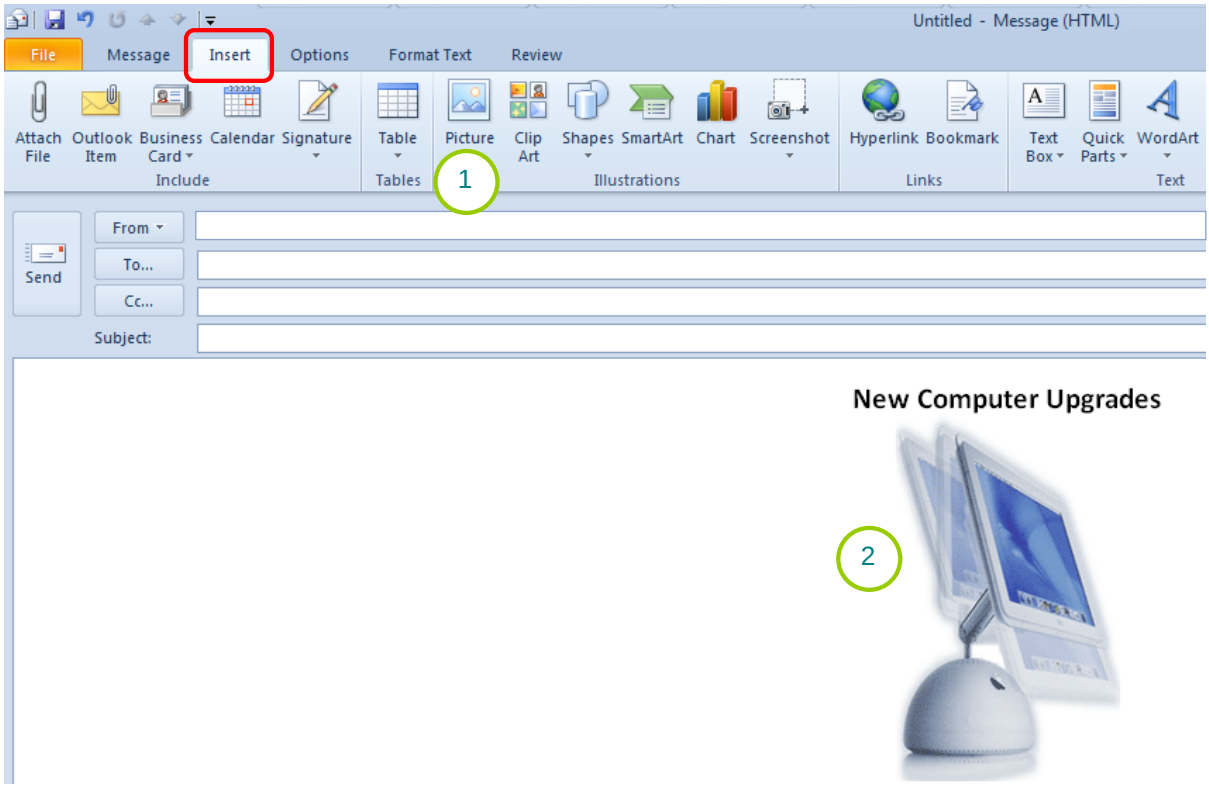
Because including an attachment is such a common activity, **Attach File is available from both the Message tab and the Insert tab.**

File Type and Size

There are a few file type and size guidelines you should follow before attaching files or items to an Outlook item.

- **Make sure the recipient of an attachment will be able to open and read the attachment**. The recipient must have the application in which the attachment was created or a similar application.
- **Be aware of attachment size** as a large attachment will use a lot of space and might delay the opening of the item to which it is attached.

Include a picture in line with text

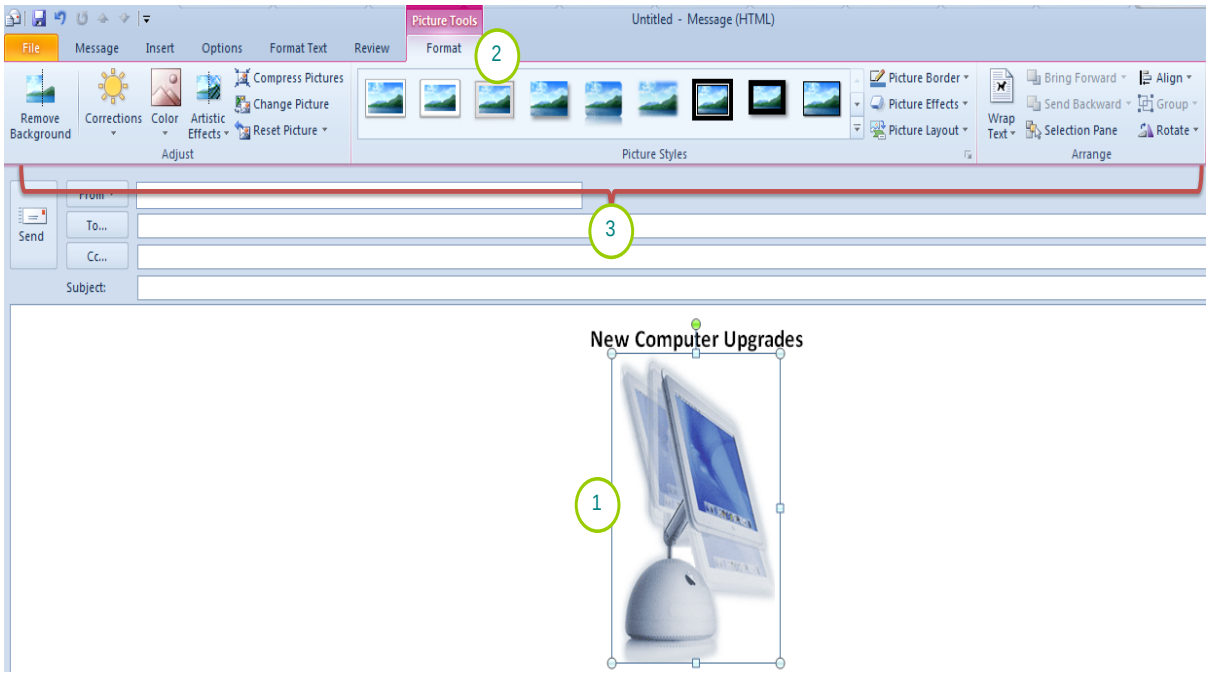


In Outlook, it's easy to **send pictures in line with the text of your e-mail messages instead of as separately attached files**. To do this, you would:

1. Click the **Picture** command located on the **Insert** tab.
2. When you insert a picture this way, you'll see a picture in line with the text of the message as we've shown here.

> **Note** When you insert a picture into your message, you add it to the message as an embedded object. That is, it is a part of the message text. To be able to see the picture, people who receive your message must be able to receive **HTML** or **Rich Text** messages.

Tabs that come and go (known as contextual tabs)



Some tabs appear only when you do specific tasks.

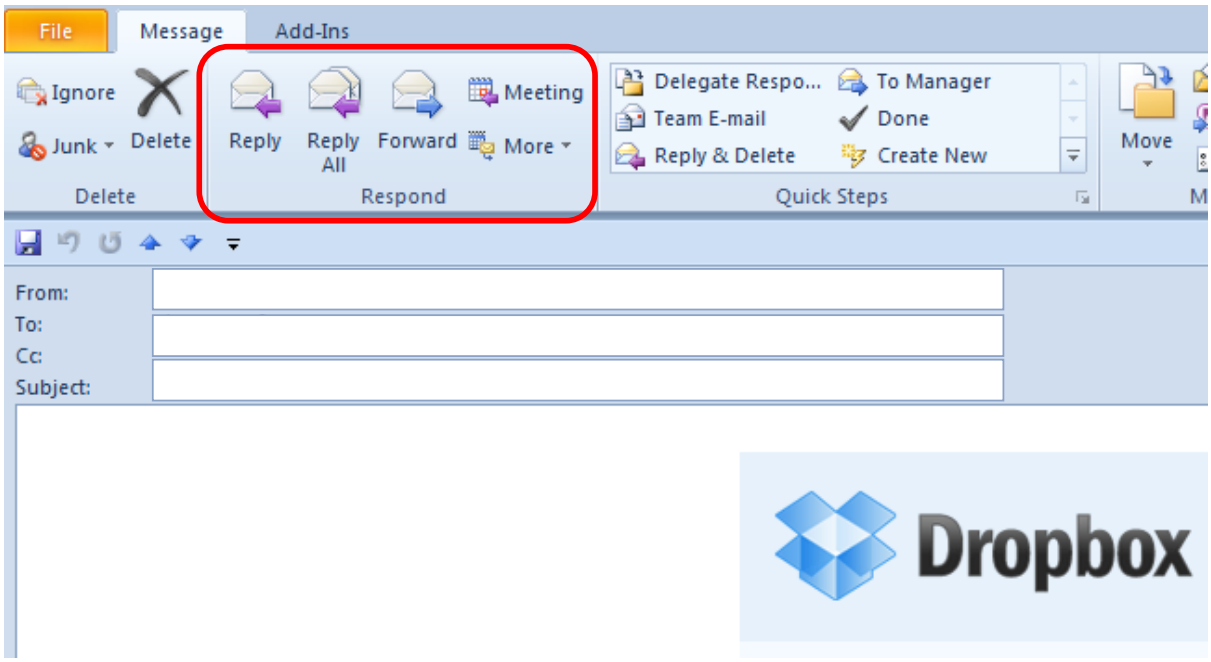
For example, when you:

1. Select a picture that you have inserted into a message…
2. …you'll see that **Picture Tools** appear on the Ribbon.
3. The **Format** tab includes commands that you can use to edit the picture before you send it.

When you click away from the picture, **Picture Tools** disappears.

You'll see similar behaviour if you include a chart, drawing, diagram, or table in your message.

Respond to a message



E-mail isn't just about sending… it's also about receiving and replying. When you reply from an open message, you'll use the buttons in the Respond group on the Message tab of the Ribbon.

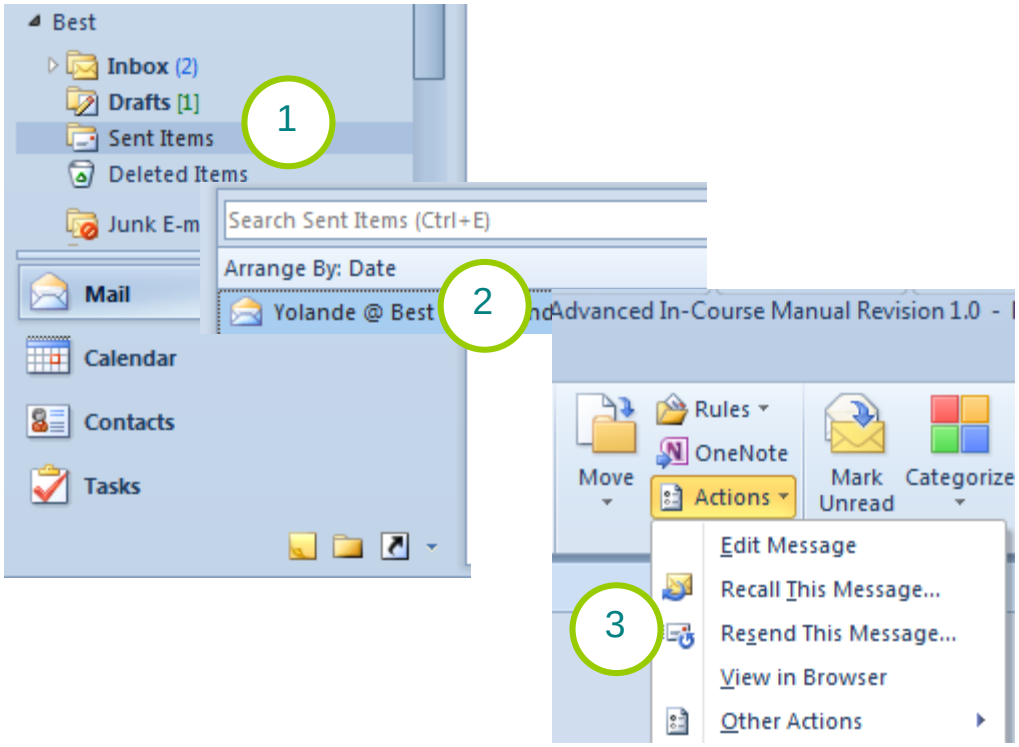
You'll notice that what's on the Ribbon in a received message is different from what's on it for a new mail message.

Reply Options

When you want to reply to a message, you have a few options:

Reply	To send a response to the sender of the message.
Reply to All	Send a response to the sender and copies of the response to anyone who received the original message.
Forward	Forward a copy of the message to someone who did not receive the original.
The InfoBar	The InfoBar displays information about what has occurred or what action you need to take. It is displayed below the active toolbar.

Whoops! Need to recall a message?



Suppose you've just clicked Send and you realize that a key detail in your message is wrong (for example, maybe you wrote "bored" instead of "board" when discussing the results of the last board meeting).

If you're using Microsoft Exchange Server for your e-mail, you may be able to recall the message that you just sent. If you act before a recipient reads the message, recalling it will allow you to send a corrected version to that person and avoid possible embarrassment. Here's what you would do:

1. In the **Navigation Pane**, click **Sent Items** to switch to that folder.
2. In the **Sent Items** folder, double-click the message that you want to recall to open it.
3. In the open message, click **Actions** in the **Move** group, and click **Recall This Message**.

> **Note** If you don't see the **Recall This Message** command, it's probably because you're not using Microsoft Exchange Server for your e-mail.

Forward a Message

You received a message from a co-worker that you want to share with another co-worker who didn't receive the original message. By forwarding the message, you can **quickly and easily share the information**. The only information you need to enter is the recipient's e-mail address.

Print a Message

Although an advantage of email is that it doesn't require paper, there will be occasions when **you will want to have a hard copy of a message**, either one you've sent or one you've received.

1. **Open the message** you want to print
2. Click the **File tab** and select **Print** to display the print view
3. To **increase the number of copies** you want to print, click the **Print Options** button and in the **Number of Copies** spin box, click the up arrow as needed to enter the appropriate number of copies.
4. If necessary, modify the desired print options
5. Click **'Print'**

Delete a Message

You have been using Outlook for a while, so your Inbox contains a lot of old messages that you no longer need. By deleting those old **messages your Inbox will be less cluttered and you will save space on your hard drive.**

To delete a message

- With message selected or opened click the '**Delete'** button on under the '**Message'** tab or the '**Delete'** button on the **keyboard** or right click and select delete.

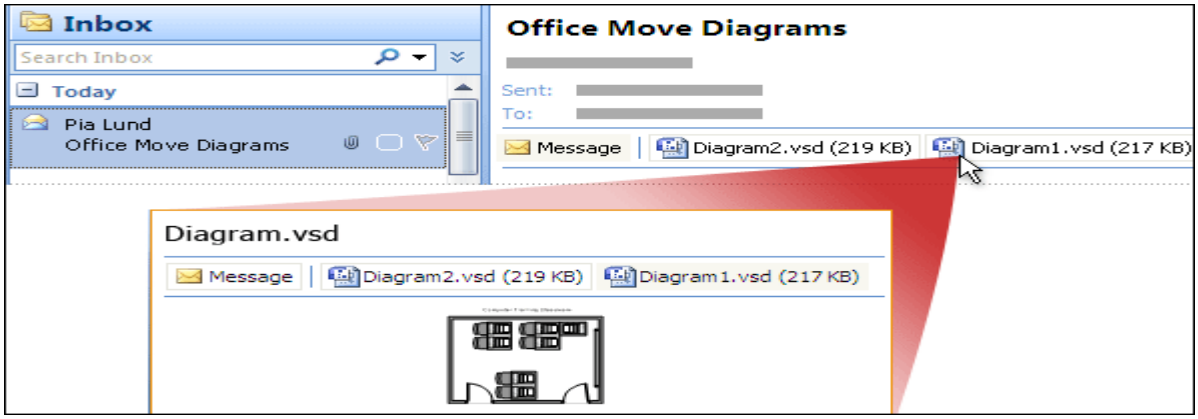
Recover a Deleted Message

- Drag the message from the deleted items folder to any other folder.

Unit 3 - Managing Mail

Your mailbox is overflowing. There are many messages you've received and want to keep yet others you no longer need. It's becoming more difficult to find certain messages. **By organising your mailbox, it will be easier to retrieve information efficiently.**

Preview attachments before you open them



In Outlook 2010, you'll receive attachments just as you did in earlier versions of Outlook. And now, **some attached files can be previewed right from the Reading Pane.**

Suppose that someone sends you two Microsoft Office Visio diagrams as attachments, but you only care about the one that shows the new training room in your building.

How could you quickly decide which file to open or save to your hard disk?

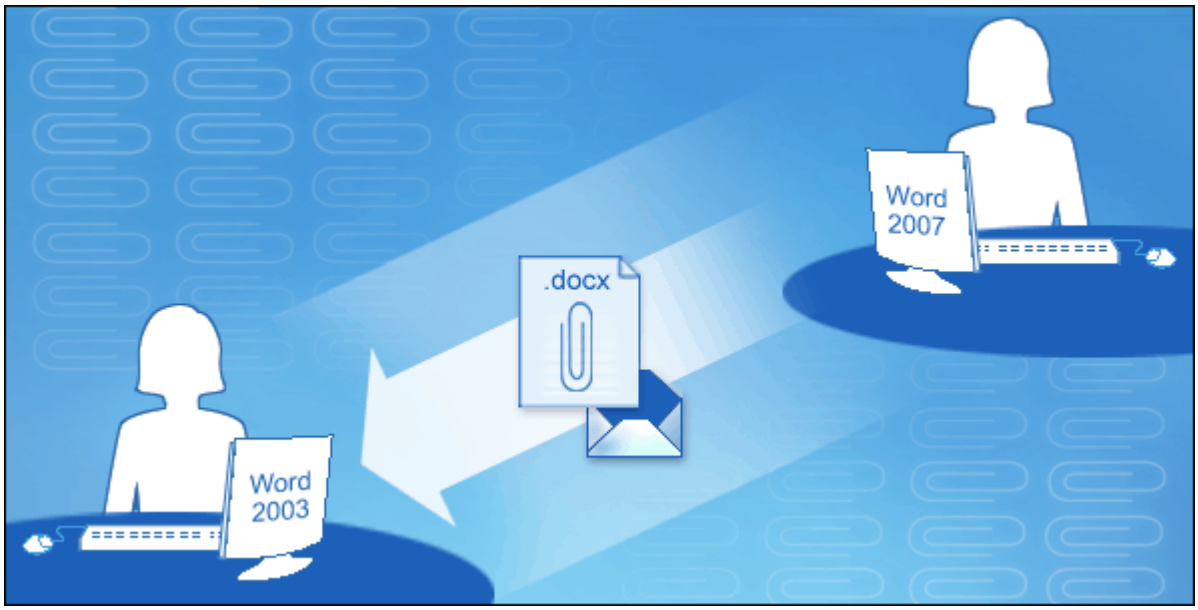
To preview an attachment, click its icon. The attachment preview appears in the Reading Pane.

Attachment previewing allows you to display previews of certain file types right from the Outlook Reading Pane. You can do this without having to open the attached files.

> **Note** To help keep your computer safe, embedded code in attachments is disabled while previewing.

Once you've decided an attached file is one that you want to open or save, you can do that by right-clicking its icon in the Reading Pane.

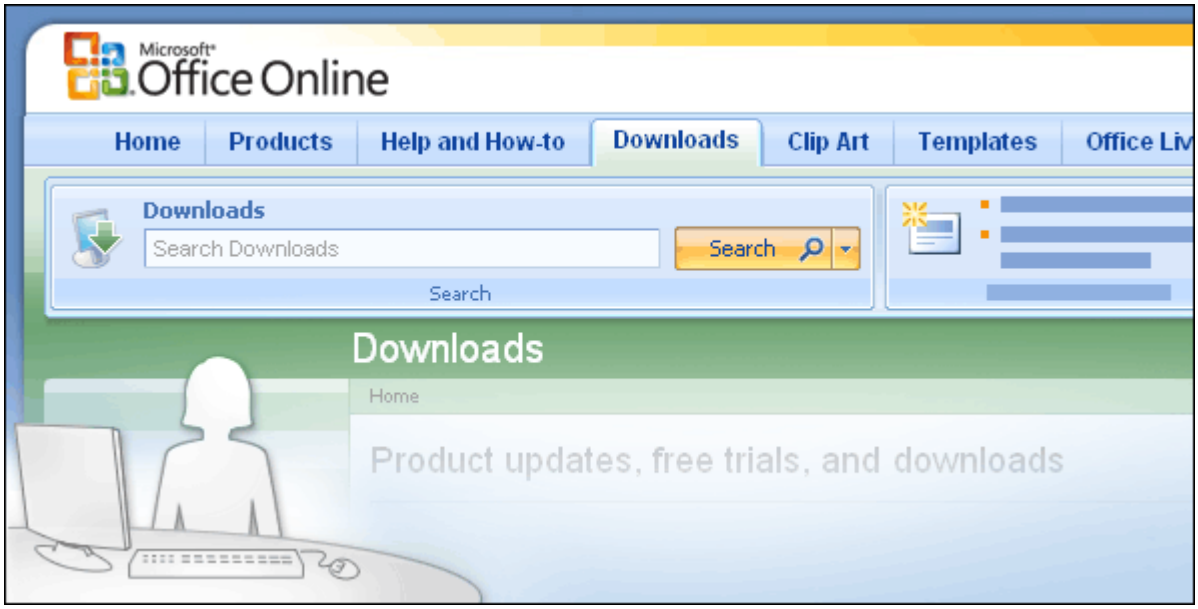
How others receive attachments that you send



How others receive attachments that you send has not changed. What has changed is the file format used by some 2010 release programs such as Word 2010 (now .docx), PowerPoint 2010 (now .pptx), Excel 2010 (now .xlsx), and Access 2010 (now .accdb).

This new format keeps file sizes smaller and helps keep files safer. Attachments that you send or receive may use this new format. Outlook fully supports sending and receiving files that use the new formats

How others can view attachments that you send



Others can download a compatibility pack so that they can open, edit, and save documents that use the new Microsoft Office file formats.

Maybe you're the **first person in your workgroup to get the 2010 Office system**. Or perhaps you work with **some departments who need to use Office documents saved in an earlier format**. You can still share documents with each other. Here's how:

You can open a file created in previous versions of Office, from 95 through 2003. Just open the file as usual. After working with it in the 2010 version, you may want to save the file. **By default, the Save As dialog box saves a file created in a previous version as that same version**. As you save, a **Compatibility Checker** will let you know of any new features added to the file that may be disabled, or matched as closely as possible.

Note If you open a presentation created in PowerPoint 95, PowerPoint will default to the 2010 format when you save it. But you can choose to save the file in the 97-2003 formats.

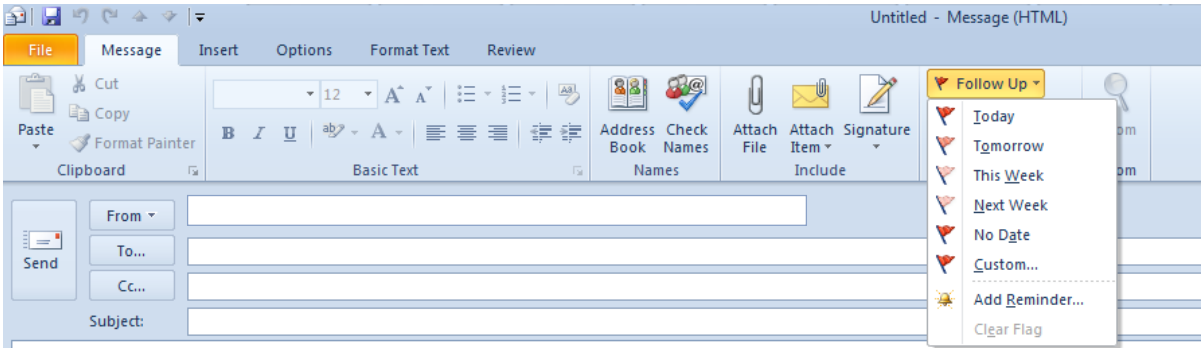
If you want to save the file in the 2010 format, select Word Document, Excel Workbook, or PowerPoint Presentation in the Save as type box.

Colleagues who have Word, Excel, or PowerPoint versions 2000 through 2003 (*and the latest patches and service packs*) can open 2010 files. When they click on your document, they will be asked if they want to download a converter that will let them open your document.

Use Flags and Reminders

You receive a message that contains information that you will need to refer to in a few weeks. Because you have so many other messages in your Inbox, you're concerned that you will forget to revisit that particular message at the appropriate time.

By flagging the message it will stand out, drawing attention to it. The flag will ensure that **the message is easy to find and is a reminder to refer back to the message.**



Flags and reminders can help you and others remember to do things.

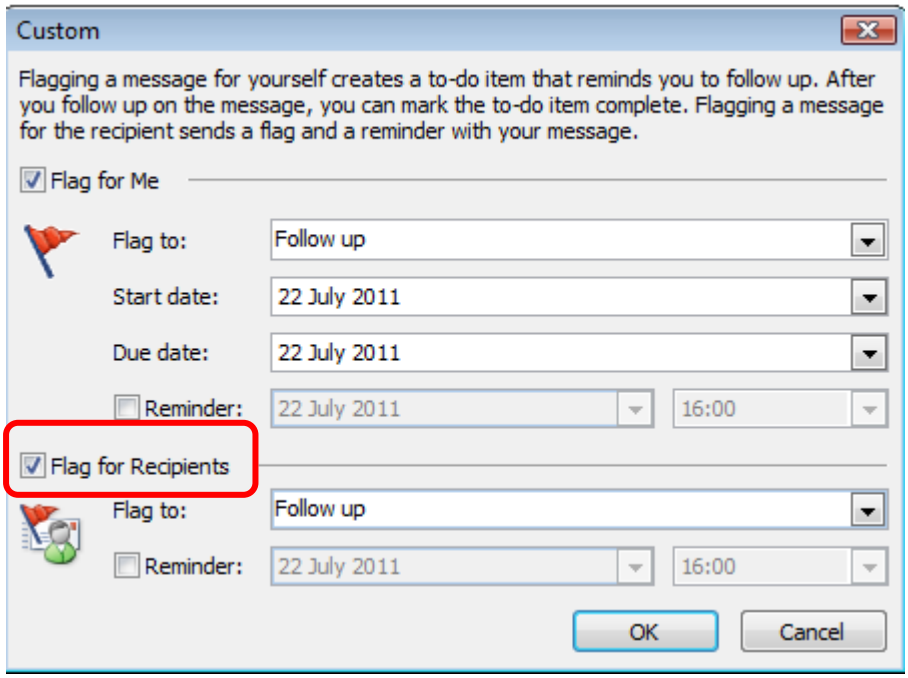
To add a flag or a reminder (or both) when you're creating a message, start by clicking **Follow Up** in the **Tags** group of a new e-mail message.

Follow Up for Yourself

Suppose you send a message to a colleague that says **"I'll follow up with you tomorrow."** To be sure that you remember to do that, **flag the message for yourself by clicking Follow Up and then clicking Tomorrow**. The message (which is moved to the Sent Items folder once you send it) is flagged and **added to your To-Do List in Tasks list**. It also shows up as an item **on your own To-Do Bar.**

Follow Up for the Recipient

You can also **attach a follow-up flag for your recipients** by using the Custom option and then selecting the Flag for Recipients check box. **Before you send the message, you specify when you want the recipient to be reminded to follow up with you.**



The received message will include a flag and the bell icon (indicating that the message includes a reminder). As long as the recipient keeps the message in his or her Outlook mailbox, **a reminder will be displayed at the time you specify**.

> **Note** The item will **NOT** be added to the recipients To-Do Bar — creating a to-do list is a matter of personal choice.)

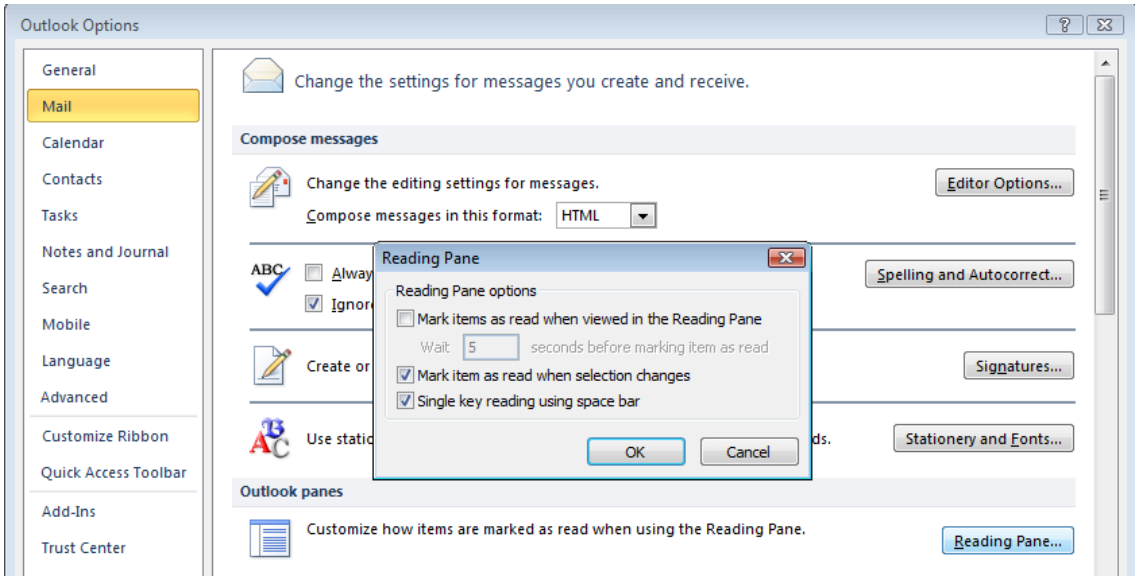
Mark a Message as Unread

You can manually change the status of a message from **read** to **unread**.

1. In the **Inbox** select the message you want to mark as unread
2. In the **Tags** group click the **Unread/Read** button **OR**
3. Right-click the message and click **Mark as Unread**
4. In the Inbox, the message is now bold and has a closed envelope symbol, indicating an unread message.

Automatically Mark Messages as Read in the Reading Pane

1. Select the File tab and click 'Options'
2. Select the Mail category
3. From the Outlook Panes section click 'Reading Pane'
4. Select the 'Mark items when read when viewed in the Reading Pane' check box and then type a number in the Wait n seconds before marking item as read box



Create a Folder

If necessary, click the **Mail button** on the **navigation pane** to display the mail folders

If you want the **new folder at the top level, right-click Personal Folders,** (or whatever name you have assigned to the top level) select **New Folder** from the context menu. Otherwise, **right-click the folder that you want the new folder in,** select **New Folder** from the context menu.

1. Outlook displays the Create New Folder dialog box. The location for the new folder is shaded in the folder display.
2. You can, if necessary, change the location at this point
3. Type the name of the new folder in the Name box
4. Make sure that Mail and Post Items is selected in the Folder Contains list

Copy Messages to Folders

You might receive **messages that contain information on more than one subject**. It would make organising more efficient if you could save those messages into more than one folder.

1. Select the message you want to copy
2. In the **Home** ribbon from the **Move** group, click the **Move** button then click **Copy to Folder**
3. In the Move Items dialogue box select the folder to which you want to copy the message and click **OK**

Delete a Folder

1. In the ‘All Mail Folders’ pane, select the folder you want to delete.
2. On the Standard Toolbar click the ‘Delete’ button.
3. In the message box, click ‘Yes’ to confirm the deletion of the selected folder.

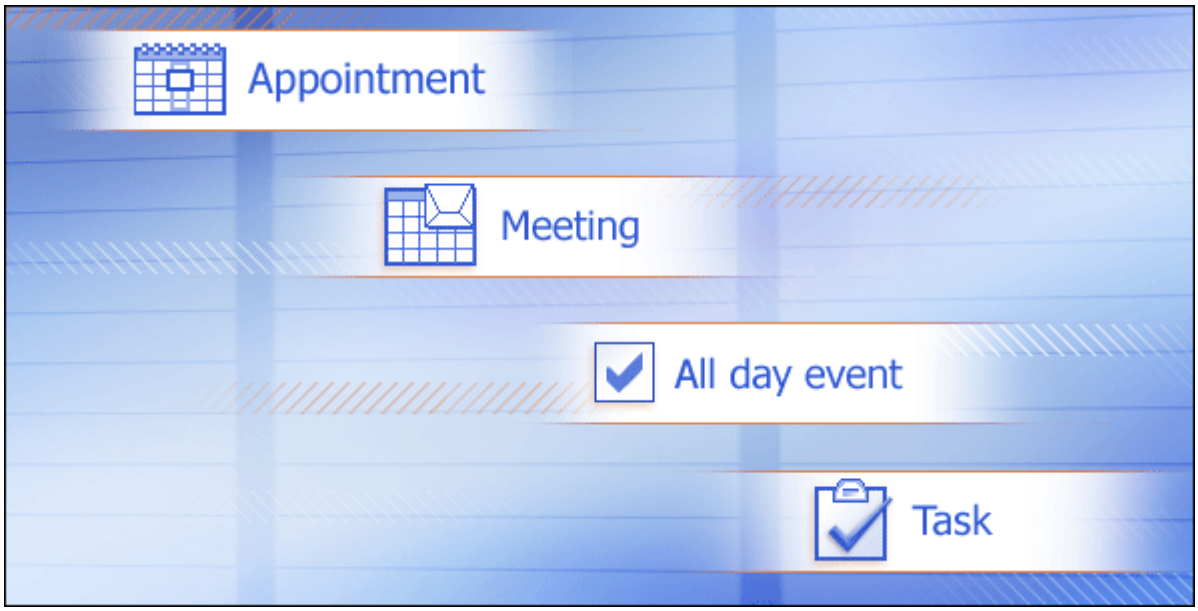
Unit 4 - Scheduling Appointments

You have discovered how Outlook helps you to communicate electronically and manage those communications. You can also **keep your schedule organised electronically by using the calendar.**

Your paper calendar is a mess. You've scheduled, re-scheduled and cancelled appointments. There are scribbled notes posted on certain days as reminders. **By using the Outlook calendar your schedule will always be up to date and easy to read.**

The Outlook Calendar

Before you use the calendar you will need to become familiar with its components and how they work. By understanding the basics of the calendar you will have a solid foundation upon which to build more critical skills.



You can schedule activities in your Outlook calendar as **appointments, meetings, events, or tasks**.

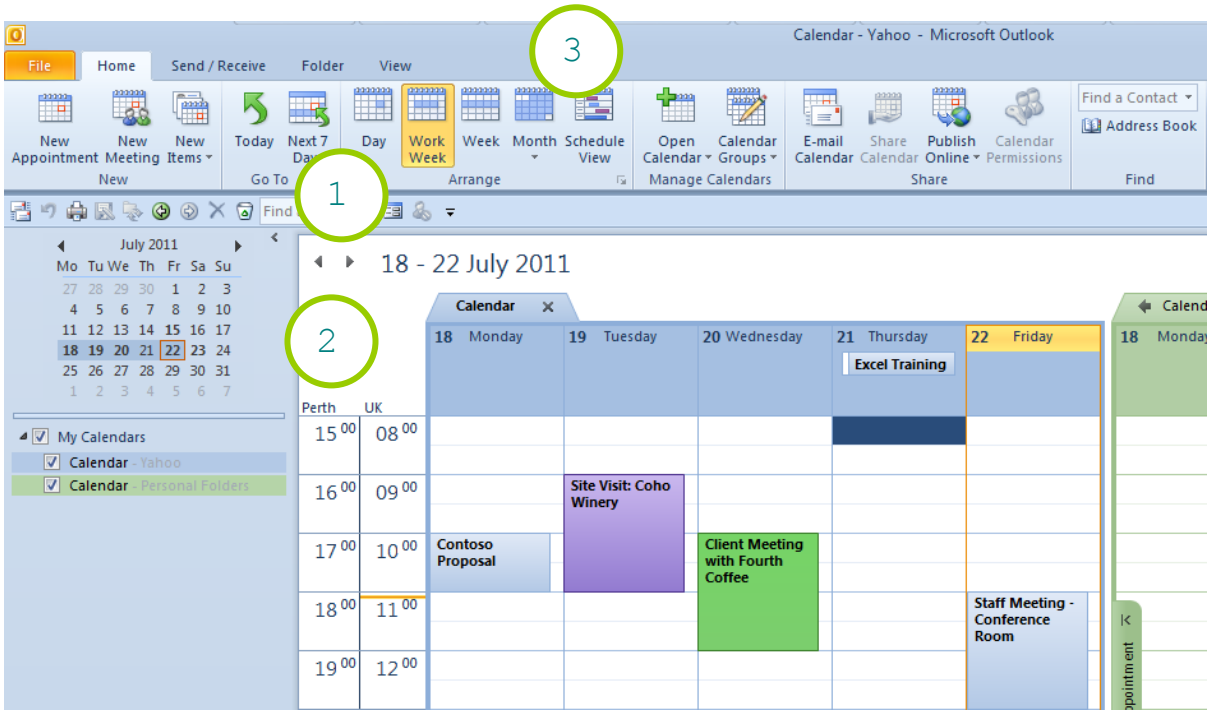
Your choice of entry type will depend on who else is involved and how you want the entry to appear.

By selecting entries in your calendar correctly, you'll know at a glance what's going on, when, and with whom.

See Your Calendar

Before you can see what's in your calendar, you need to know how to find it. **Here are two quick ways to see the calendar:**

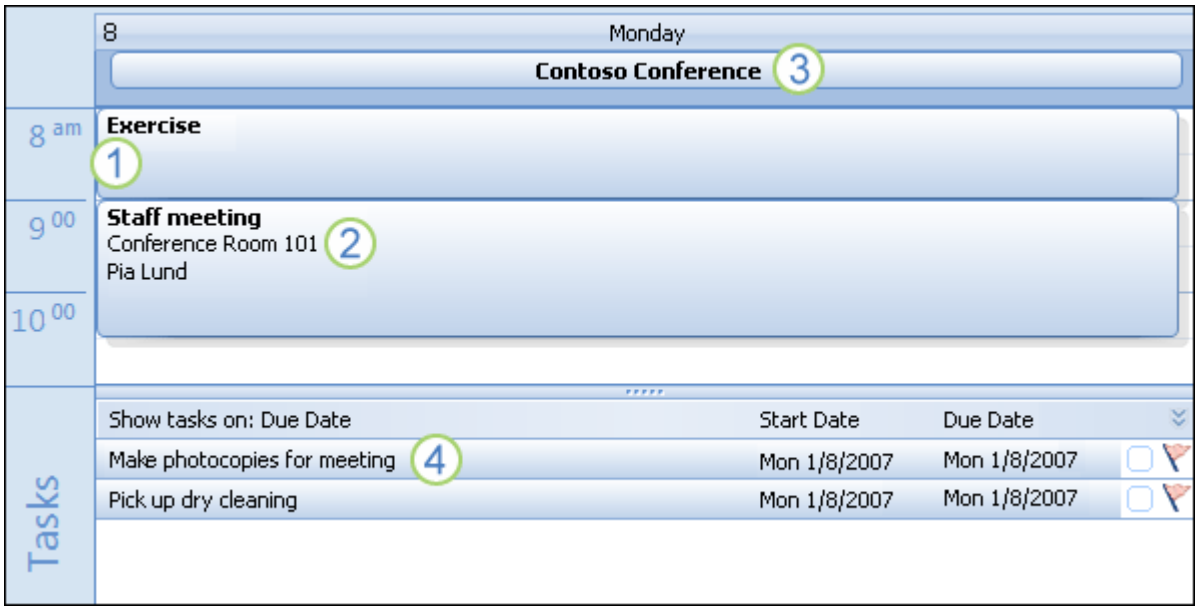
- Click **Calendar** in the **Navigation Pane**.
- Click a **date** on the **Date Navigator** (which you'll find at the top of the **To-Do Bar**).



Once you're looking at your calendar, you can use the **Home** ribbon buttons to navigate and to show or hide detail:

1. Click **Day**, **Work Week**, **Week**, **Month** or **Schedule View** to quickly switch views.
2. **Forward** and **Back** buttons allow you to easily move through your calendar.
3. The **Month** button gives you three options to show detail: **High**, **Medium** or **low**.

Know Your Choices



The above view of the calendar shows each type of entry occurring once.

1. **Appointment:** An appointment is an activity that involves only you, at a scheduled time.
2. **Meeting:** A meeting occurs at a scheduled time, like an appointment. The difference is that you invite other people by using a meeting request that's sent via e-mail.
3. **Event:** An event is an activity that lasts all day long. Unlike an appointment or meeting, an event doesn't block out time in your calendar. With an event, you can still have other entries appear in your schedule for that day.
4. **Task:** A task is an activity that involves only you, and that doesn't need a scheduled time. New to Outlook 2007 and Outlook 2010 is an area in your calendar's Day and Week views that shows tasks.

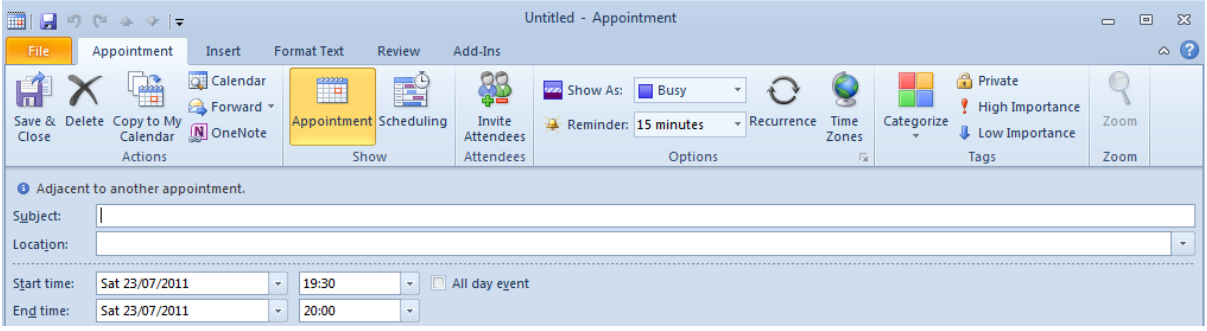
Just You? Use an Appointment

Appointments are activities that you schedule in your calendar that **do not involve inviting other people or reserving resources**. You can schedule **recurring appointments**, view your appointments by **day, week, or month**, and **set reminders** for your appointments.

You can specify **how the appointments in your calendar look to others** by designating the time of the appointment as **busy, free, tentative, or out of office**. Also, others can give you permission to schedule or make changes to appointments in their calendars.

Create an Appointment

1. On the **Home** ribbon, click **New Appointment** button**.**
2. Keyboard shortcut to create an appointment, press **Ctrl + Shift + A**.
3. In the **Subject box**, type a description.
4. In the **Location box**, type the location.

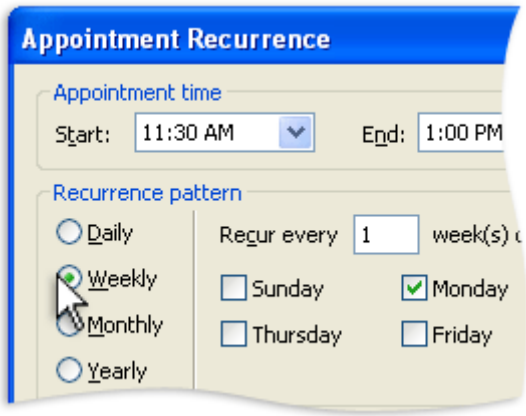


5. Enter the start and end times.

> **Note** By default, the current time zone setting on your computer system is used to schedule appointments. If you want to schedule your appointments based upon an alternate time zone, on the **Appointment** tab, in the **Options** group, click **Time Zones**.

> **Tip** You can type specific words and phrases in the **Start time** and **End time** boxes instead of dates. For example you can type **Today**, **Tomorrow**, **New Year's Day**, **Two Weeks from Tomorrow**, **Week from Yesterday**, **Three days before New Year's Day**, and most holiday names.

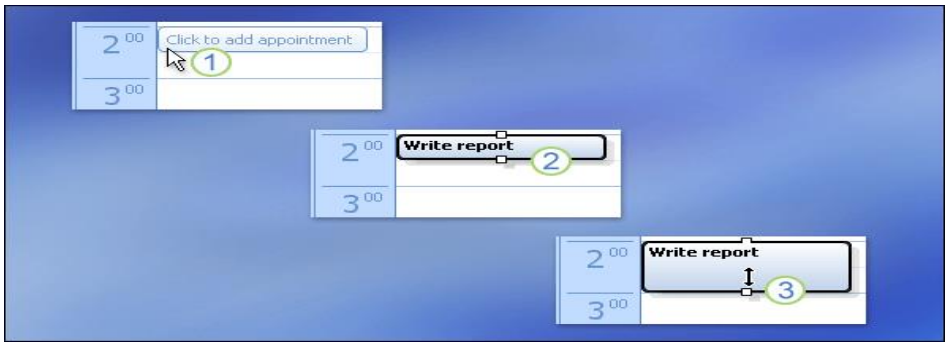
6. Select any other options that you want.
7. To make the appointment recur, on the Appointment tab, in the Options group, click Recurrence.
8. Click the frequency (Daily, Weekly, Monthly, Yearly) with which the appointment recurs, and then select options for the frequency.



9. Click OK.

10. On the Appointment tab, in the Actions group, click Save & Close.

One **quick way to start an appointment** (or any calendar entry, for that matter) is to rest the pointer over the desired time in Day view, click, and type the details. We've shown the steps to do this in the picture:



1. Rest the pointer over the desired time in your calendar and click.

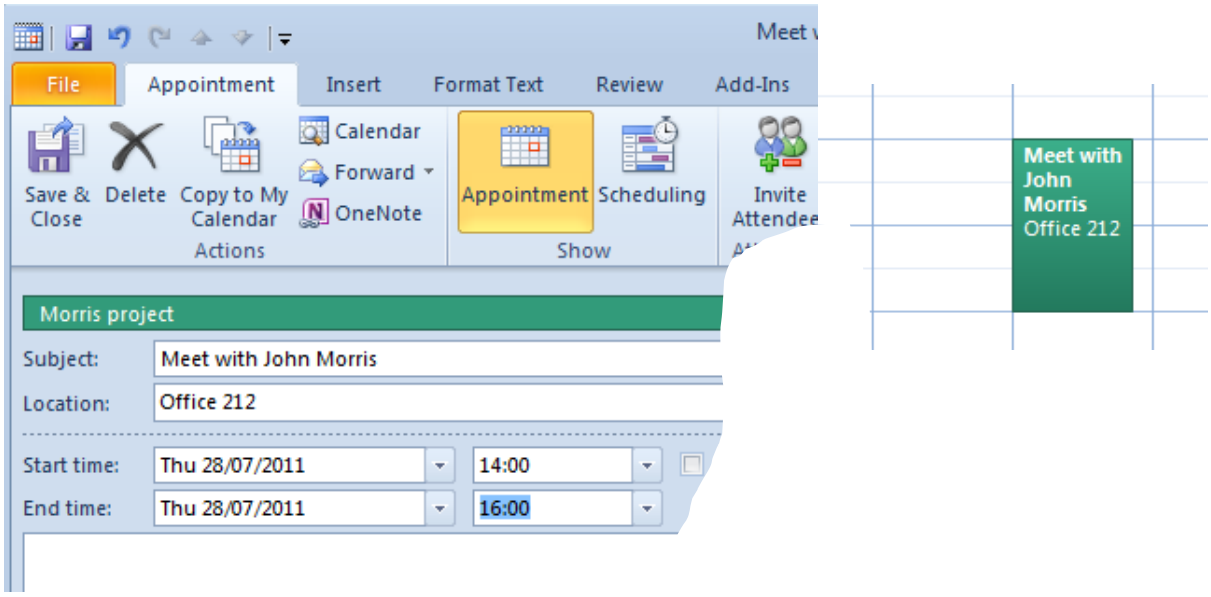
2. Type the details.

3. Need more time for your appointment? Simply drag the bottom handle to make the appointment longer.

Assign a Colour Category To a Calendar Appointment

You can **track all items related to a particular project or task by using colour categories to easily identify and organize the items.** Besides calendar items, you can assign colour categories to contacts, messages, tasks, notes, and journal items.

Colour categories connect your calendar items for easy identification. The colour categories connect you to other related items too, such as messages or contacts.



A category must be listed in the colour category list before you can assign it. If it is not listed, you can simultaneously create a new colour category and assign it to an item for the first time. You can also choose from several default colour categories and rename them to be more meaningful to you.

To assign a colour category, do the following:

- **For an appointment in Calendar**
  - Right-click the appointment, point to Categorise, and then click a colour category.
- **For an open appointment**
  - On the Appointment tab, in the Tags group, click Categorise, and then click a colour category.
- **For an open meeting request**
  - On the Meeting tab, in the Tags group, click Categorise, and then click a colour category.
- **For a open recurring meeting request**
  - On the Recurring Meeting tab, in the Tags group, click Categorise, and then click a colour category.

To see more categories or to create a new category

Click All Categories to open the Colour Categories dialog box. To assign a colour category from the Colour Categories dialog box, you must select the check box next to the colour category. The Colour Categories dialog box is also a quick way to assign multiple categories to an item.

The first time that you assign a default colour category to an item, you will be prompted to rename the category. At this time, you can also change the colour of the category and choose a keyboard shortcut.

Note	You can change the colour associated with a category at any time.

Another way to open the Categorise menu and Colour Categories dialog box is by selecting a meeting in the Calendar. This opens the Calendar Tools contextual tab where you will find the Categorise button in the Tags group.

Only the 15 most recently used colour categories appear on the Categorise menu. To see the rest, click All Categories on the Categorise menu.

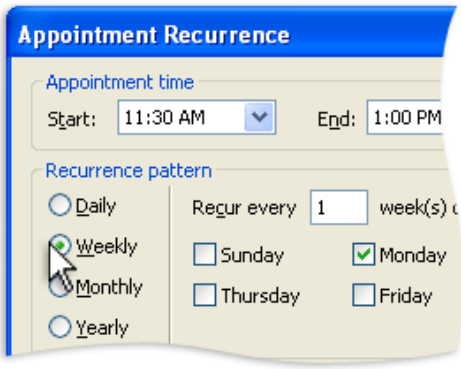
Change an appointment

Open the appointment, event, or meeting that you want to change.

Do one of the following:

4. Change options for an appointment that is not part of a series
    a. On the Appointment tab, change the options, such as subject, location, and time that you want to change, then, click 'Save and Close.'
5. Change options for all items in a series
    a. In the Open Recurring Item dialog box, click Open the series.

    b. On the **Appointment tab**, change the options, such as **subject, location, and time** that you want to change.
    c. To change recurrence options, on the Appointment tab, in the Options group, click Recurrence. Change the options, such as time, recurrence pattern, or range of recurrence, and then click OK.



6. Click Save and Close.

7. Change options for one item that is part of a series

   a. In the Open Recurring Item dialog box, click Open this occurrence.

   b. On the **Appointment tab**, change the **options**, such as **subject, location, and time**, that you want to change, and then click **Save and Close**

Tip In Calendar, you can drag the appointment, event, or meeting to a different date. You can also edit the subject by clicking the description text and typing your changes.

You can change an event into an appointment, causing the time to be blocked out in your calendar, by clearing the All day event check box and then entering the start and end times of your choice.

Events are defined as lasting from midnight to midnight; clearing this check box allows you to enter specific start and end times.

Deleting Appointments

1. Select the appointment (hold down Ctrl or Shift key to select more than one item)

2. Right click and delete or on Calendar Tools Appointment ribbon click Delete button in the Actions group or delete on keyboard.

http://office.microsoft.com/client/&app=ZOL&ver=14 *View a Calendar Snapshot*

A Calendar Snapshot is sent to you in an e-mail message in the iCalendar format. It is a static calendar that can be updated only after the calendar owner sends you a new Calendar Snapshot. There are two ways in which you can view the calendar information in a Calendar Snapshot — in the message body or as an additional calendar in Calendar view in Outlook.

Open the calendar as an additional Outlook calendar

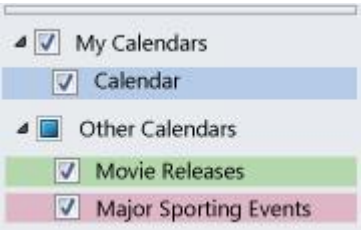
3. Select the message that has a Calendar Snapshot.
4. If you use the Reading Pane, the calendar appears in the message body.
5. If you have turned the Reading Pane off, open the message to see the calendar in the message body.

6. Do one of the following:

- **You are using the Reading Pane**
  - In the Reading Pane, click **Open this calendar**.
- **You have opened the message in a separate window**
  - On the **Message** tab, in the **Open** group, click **Open this calendar**.

7. If you know and trust the source of the calendar, click Yes at the prompt, and then click Add this Internet Calendar to Outlook.

The Internet Calendar opens in side-by-side view in the Outlook Calendar and is added to the Navigation Pane in Calendar view under **Other Calendars**.



Notes: To remove a calendar from side-by-side view, clear the check mark for the calendar in the Navigation Pane.

To overlay multiple calendars, use the arrow buttons on the calendar tabs.

You can drag items from the Calendar Snapshot to other calendars in side-by-side view.

To remove the Calendar Snapshot from the Navigation Pane, right-click the name of the calendar, and then click Delete calendar name.

View the calendar in the body of an e-mail message

- If you use the Reading Pane, the calendar appears in the message body.
- If you have turned the Reading Pane off, open the message to see the calendar in the message body.

Send an Outlook 2010 calendar in an email message

A copy of your calendar can be sent to anyone in an email message. The calendar is included as an attachment and also appears within the message body. You decide what dates are included and the amount of detail.

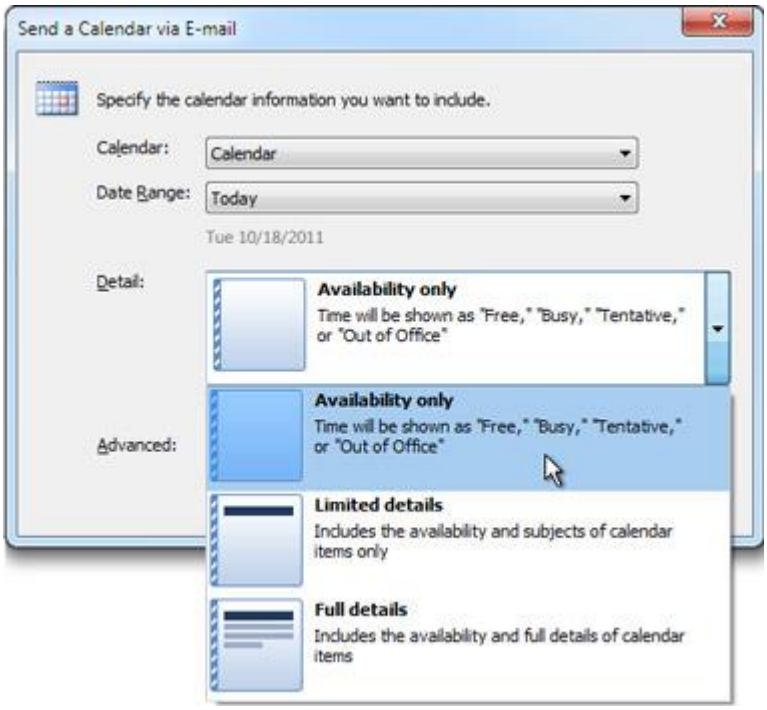
1. In **Calendar**, on the **Home** tab, in the **Share** group, click **E-mail Calendar**.

2. In the **Calendar** list, choose the calendar to send. By default, the default Calendar is chosen. This is the Outlook calendar that is used to display your free/busy information to others and where meeting requests are accepted.

3. In the **Date Range** list, choose the amount of calendar data to include in your message, or click **Specify dates** to enter a custom date range.

Tip:	If you choose a large date range or select Whole calendar, you might create a large message.

4. In the **Detail** list, choose the amount of detail to show the recipients. By default, the **Availability only** option is selected. None of the options include your items marked private unless you change the privacy option in **Advanced** options.



5. Optionally, you can restrict the information included in the message to your working hours by selecting the **Only show time** within my **working hours** check box. To change your working hours, click **Set working hours**.

6. Optionally, to see advanced options, click **Show**.

- **Include details of items marked private** This option requires **Detail** to be set to **Limited Details** or **Full Details**. The existence of private items is included, but no further information is shared.
- **Include attachments within calendar items** This option requires **Detail** to be set to **Full Details**. All attachments on calendar items, such as spreadsheets, are included.
- **E-mail Layout** You can include your **Daily schedule** or a **List of events**.

7. Click **OK**.

8. In the **To** box, enter the name of the person to whom you want to send the subscription information.

9. In the **message body**, enter any information you want to include.

10. Click **Send**.

The calendar appears to the recipient within the message body. The attached iCalendar file with a file extension of .ics can also be opened in many calendar programs, including Outlook.

When an .ics file attachment is received in Outlook, the recipient is prompted to open the calendar. An .ics calendar file opens as a new calendar within Outlook. When opened as an Outlook calendar, the recipient can view the received calendar in side-by-side or overlay views. The recipient can also drag calendar items from the received calendar to another Outlook calendar.

Unit 5 - Scheduling Meetings

You need to schedule a department meeting. You must notify all employees, reserve a slide projector and determine who will be attending.

By using Outlook, you can **electronically communicate and track attendance of participants and resources at meetings from one central location.**

Schedule a Meeting

When you scheduled appointments that involve your schedule only, all you had to do was enter the information in your calendar.

Now, you will **combine two of the tasks you've already learned – sending mail messages and scheduling appointments** – to schedule meetings that involve multiple participants.

You need to schedule a department meeting. You could invite the participants by phone but that will take some time, especially if someone is not available at the designated time. By scheduling a meeting in **Outlook you can quickly invite the appropriate participants and resources all at the same time and you can pick a time that is convenient for everyone**.

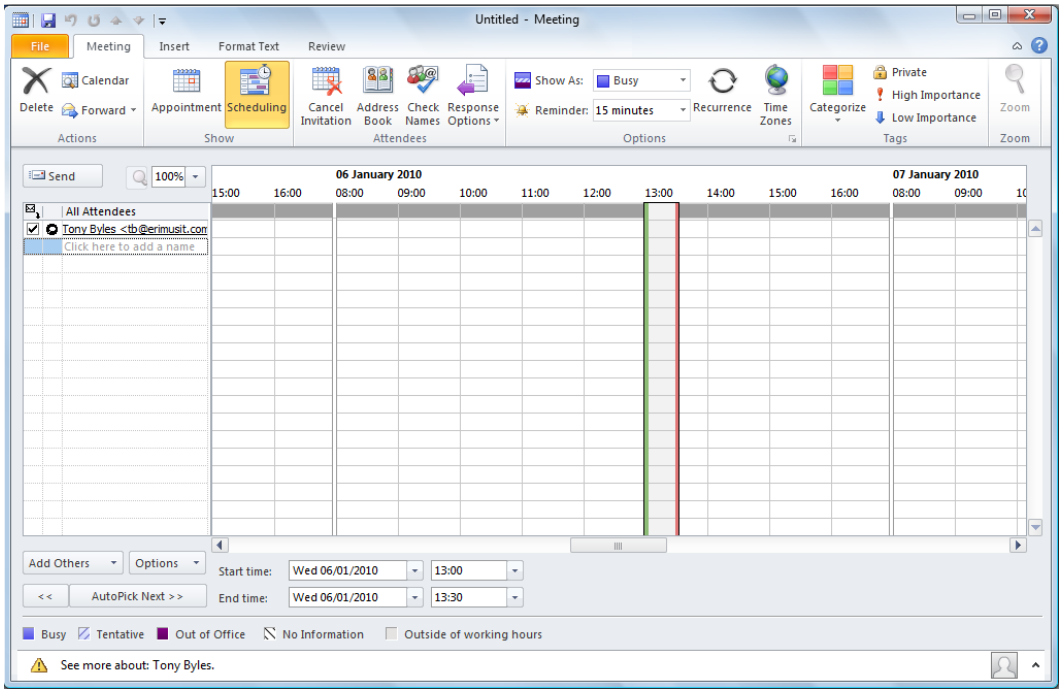
The Meeting Scheduling Process

1. The process begins with a Meeting form that you complete and send to all the meeting participants.
2. The meeting is **scheduled on your calendar** as soon as you send the meeting form.
3. As each **participant accepts or tentatively accepts the meeting**, it is inserted into their calendar and a response is sent to the meeting organiser.
4. If the meeting is declined or a new time proposed a reply is sent.

The Meeting Form

The meeting form is used to invite participants to a meeting. It consists of three tabs:

- **The APPOINTMENT button**
  - Allows you to enter a subject, a location for the meeting, start and end times and any other information regarding the meeting.
- **The SCHEDULING button**
  - Allows you to co-ordinate the meeting to fit the schedules of all attendees.
- **The TRACKING button**
  - Displays the meeting participants and their replies. This section is not visible until the meeting form is sent to the participants.



Meeting Resources

A Meeting Resource is an item with its own e-mail account on the Microsoft Exchange Server that you can use to schedule for a meeting. It will automatically accept or reject meeting invitations.

Schedule an In-Person Meeting

1. On the **Home** ribbon, in the **New** group, click **New Meeting**.
   a. Keyboard shortcut. **CTRL + SHIFT + Q**
2. In the Subject box, type a description.
3. In the Location box, type a description or click Rooms to choose from rooms available for automatic scheduling by using Microsoft Exchange.

4. In the Start time and End time lists, select the start and end time for the meeting. If this is an all day event, select the All day event check box.

5. An all day event is a full 24 hour event lasting from midnight to midnight.

> **Note** By default, the current time zone setting on your computer system is used to schedule meetings. If you want to schedule meetings based upon an alternate time zone, on the **Meeting** tab, in the **Options** group, click **Time Zones**.

6. **Type any information** that you want to share with the recipients, **attach any files**, or create a Meeting Workspace.

7. On the **Meeting** tab, in the **Show** group, click **Scheduling**.

    a. The Scheduling view helps to find the best time for your meeting.

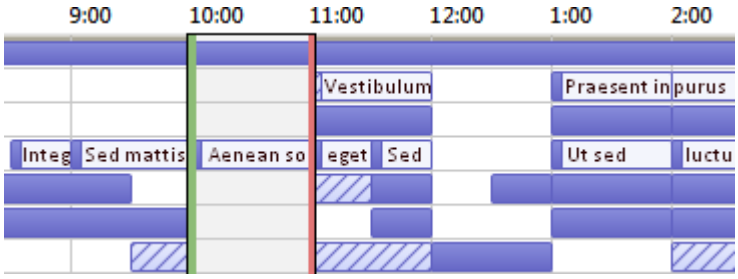
8. Click **Add Others**, and then click **Add from Address Book**.

9. In the Select Attendees and Resources dialog box, in the Search box, enter the name of a person or resource that you want to invite to the meeting. If you are searching with the More Columns option, then click Go.

10. Select the name from the results list, click Required, Optional or Resources, and then click OK.

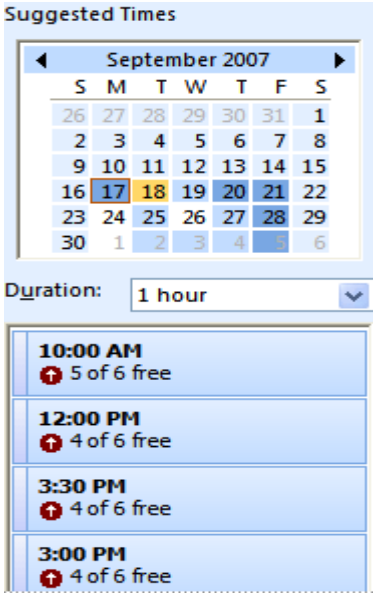
    a. Required and Optional attendees appear in the To box on the Meeting tab, and Resources appear in the Location box.

    b. The free/busy grid shows the availability of attendees. A green vertical line represents the start of the meeting. A red vertical line represents the end of the meeting.



The **Suggested Times pane** locates the best time for your meeting, which is defined as the time when most attendees are available.

The **best meeting time** appears at the top of the pane. To select any of the suggested times, **click the time suggestion in the Suggested Times pane**. You can also manually pick a time on the free/busy grid.



11. If you want to make the meeting recur, on the **Meeting** tab, in the **Options** group, click **Recurrence**, select the **recurrence pattern**, and then click **OK**.

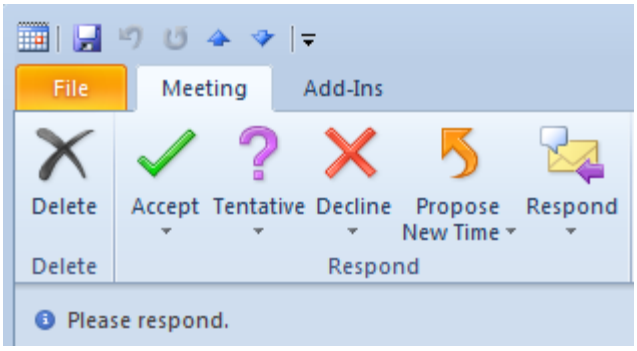
12. When you add a recurrence pattern to a meeting request, the **Meeting** tab changes to **Recurring Meeting**.

13. On the **Meeting** tab, in the **Show** group, click **Appointment**.

14. Click **Send**.

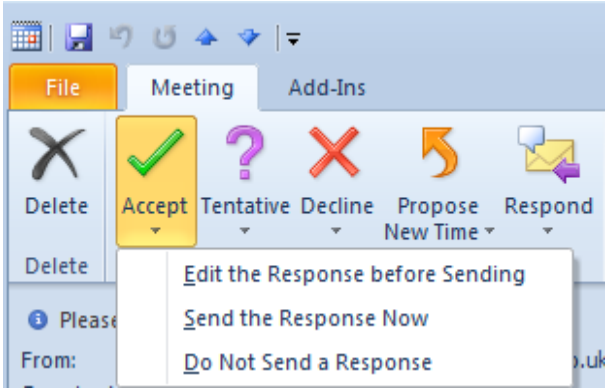
Reply To a Meeting Request

You receive a meeting invitation from a co-worker. You could call her and tell her that you will be attending but what if she (or you) forgets to document your participation?



By using Outlook to reply to a meeting request, the meeting organiser will be assured of your attendance and it will also be documented in your calendar.

ACCEPT



1. Open the meeting request.
2. Click 'Accept' on the Meeting ribbon
3. Choose one of the following:
    a. Edit Response before Sending
    b. Send the Response Now
    c. Do Not Send a Response

DECLINE

1. Open the meeting request
2. On the 'Meeting ribbon, in the 'Respond' group, click 'Decline'
3. Choose one of the following:
    a. Edit Response before Sending
    b. Send the Response Now
    c. Do Not Send a Response
4. In the meeting request, on the 'Meeting Response' tab, in the 'Action' group click 'Delete'.

Meeting Conflicts

When you open a meeting request for a meeting that conflicts within another appointment in your calendar, **Outlook alerts you by displaying a warning InfoBar.**

Conflicting meetings are displayed adjacent to each other on the calendar.

Propose New Meeting Times

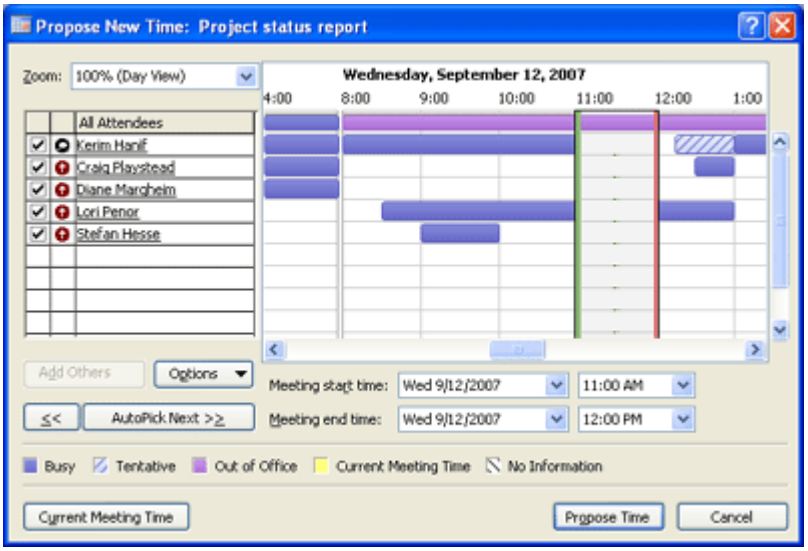
You receive an invitation to a meeting which you need to attend but you are not available at the scheduled time.

You could decline the invitation and compose a new message suggesting an alternate meeting time. To save time you could propose a new meeting time for the meeting.

1. In the open meeting request, on the Meeting ribbon, in the Respond group, click Propose New Time.

> **Note** If you open the meeting from your calendar, on the **Meeting** ribbon, in the **Respond** group, click **Propose New Time**.

2. Click either **Tentative and Propose New Time** or **Decline and Propose New Time**.
3. Click a time when all invitees are available.



4. Click Propose Time.
5. Click Send.

> *Microsoft Office Outlook 2010 sends a default message saying that you want to propose a new time but you have tentatively accepted the meeting. You can change this default message to say that you want to propose a new time, and that you are declining the meeting:*

6. Select the **File** tab, click **Options** > **Calendar** > **Calendar Options**.
7. In the **Use this response when you propose new meeting times** list, click the setting that you want.

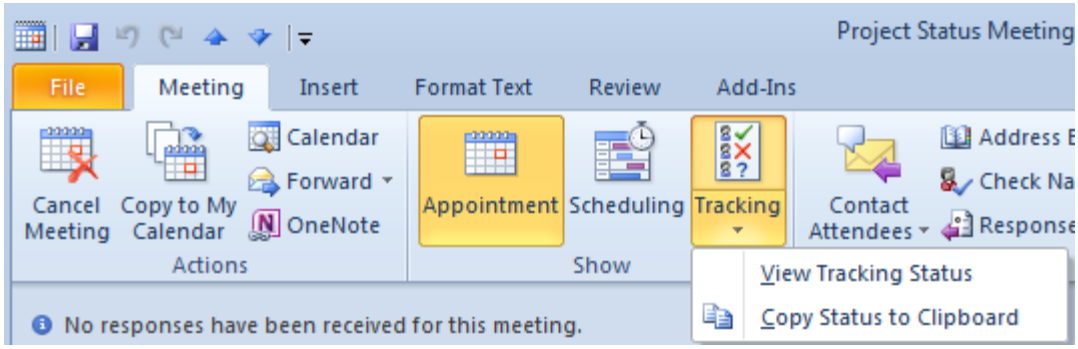
Track Meeting Responses

You have a department meeting scheduled for tomorrow. You need to determine exactly how many people will be attending so you can make the necessary preparations.

By using Outlook, **you can quickly track who has responded and who has not responded to the meeting request.**

Display the Calendar

1. **Display the date** on which the meeting is scheduled.
2. **Double click the meeting** to open the meeting form
3. From the **Meeting** ribbon select the **Tracking** button in the **Show** group.



Update a Meeting Request

You have a meeting on the wrong day. You intended for the meeting to be on a Monday rather than a Tuesday.

You could send cancellation notices and new meeting invites but that will require a lot of work on your part and generate a lot of mail for all the attendees of the meeting.

An easier and quicker solution is to **reschedule the meeting by updating the meeting request.**

1. Open the **Meeting Form**
2. Make the appropriate changes
3. **Send Update**

Cancel a Meeting Request

You have a meeting scheduled for tomorrow. A large number of participants are attending. You have a conflict, so you're going to have to cancel the meeting.

You don't have time to call everyone. Luckily, you can use Outlook to quickly solve your problem. **When you cancel a meeting in Outlook, each participant is automatically notified.** Therefore, you won't have to worry about a participant turning up for a meeting that has been cancelled.

In addition, **participant's calendars will be cleared so they can attend other potential meetings instead.**

The **only person who can cancel a meeting is the meeting organizer**. The meeting organizer is the person who sets up the meeting by choosing who to invite and sending the meeting request to those people. As an organizer, you can cancel a one-time meeting, a recurring meeting, or one or more instances of a recurring meeting.

Cancel a One-Time Meeting

1. In Calendar, open the meeting.
2. On the **Meeting** ribbon in the **Actions** group, click **Cancel Meeting**.

> **Important** If Cancel Meeting is not on the Actions menu, you are not the meeting organizer, and you can't cancel the meeting.

3. Click **Send Cancellation** and delete meeting

Cancel a Recurring Meeting

1. In **Calendar**, open the **meeting**.
2. In the **Open Recurring Item** dialog box, click **Open the series**, and then click **OK**.
3. On the **Meeting Series** ribbon, click **Cancel Meeting** then click **Send Cancellation**.

Cancel An Instance Of a Recurring Meeting

1. In **Calendar**, open the instance of the recurring meeting.
2. In the **Open Recurring Item** dialog box, click **Open this occurrence**, then click **OK**.
3. On the Meeting Occurrence ribbon, click Cancel Meeting

> **Important** If Cancel Meeting is not on the Actions group, you are not the meeting organizer, and you can't cancel the meeting.

4. In the Confirm Delete dialog box, click Delete this occurrence then click Send Cancellation.

> **Note** If you are a meeting attendee — that is, if the organizer invited you to the meeting —you can only decline the meeting or, if allowed by the organizer, propose a different meeting time.

Whether you cancel or delete a meeting, make sure that you click Send cancellation and delete meeting, and then send the cancellation to everyone you invited. It is poor meeting etiquette — not to mention inconsiderate — to cancel a meeting without notifying the people you invited.

Print the Calendar in Outlook

You are going to be out of the office on business. You have a number of meetings scheduled while you are away but you won't have your laptop with you.

By printing a copy of your calendar before you leave you won't have to worry about missing a meeting.

With the calendar open:

1. Select the **File tab** and choose '**Print'**
2. From the **Settings** area select the **Style** you want
3. Select **Print Options**
4. In the **Print Range** box, specify the **Start Date and End Date**
5. If necessary select other **Print Options**
6. Click '**Print'**

Unit 6 - Managing Contacts

You have quite a collection of business cards; however, that fax number you need in a hurry always seems hard to find.

Outlook makes it easy to organise all the information you need about your business and personal associates. Names, addresses and phone numbers are easy to search and easy to retrieve and update.

Add a Contact

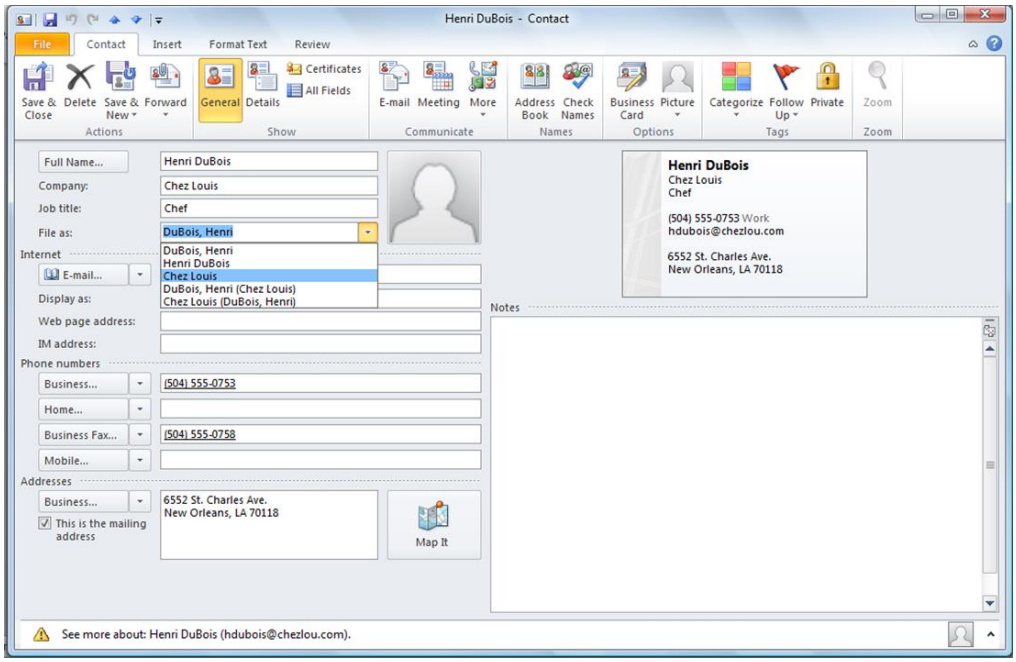
Because an external client does not work for your company, his e-mail address is not in the Global Address List. Every time you send him a message you have to type his e-mail address which is, georgemesserschmidt@msmoveandstore.com. You have on several occasions misspelled the e-mail address, therefore, having the message bounce back as undeliverable.

By adding George's e-mail address to Outlook once, you can quickly retrieve it whenever you need it, saving typing time and avoiding undeliverable messages.

Contacts

A Contact is a person with whom you communicate on a business or personal level and whose personal or business (or both) information is stored in the Contacts Folder.

The Contact Form

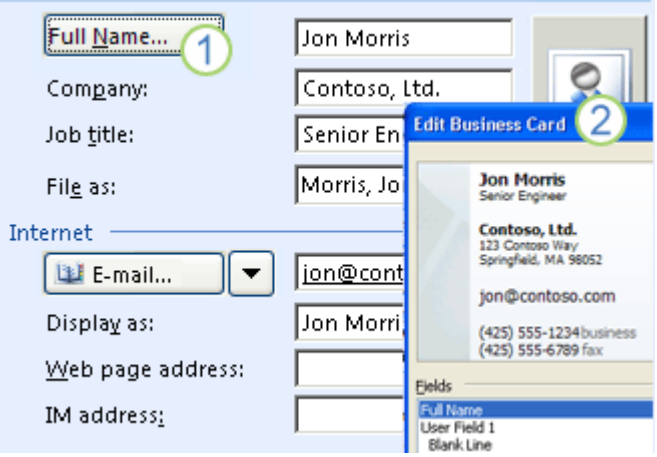


When you create a new Outlook contact, Outlook displays a Contact form that contains text boxes in which you can enter personal and business information.

The Outlook Address Book

The Outlook Address Book is a list that contains all contacts that you create by using the Contact form.

In Office Outlook 2010, **each of your contacts is also displayed as an Electronic Business Card** which is a view of specific information about a contact, in a format similar to a paper-based business card, that can be inserted into messages. Any information that you add to a contact is automatically made to the corresponding Electronic Business Card, and vice versa.



1. A contact form that contains Jon Morris's information.
2. A view of the Edit Business Card dialog box, with the corresponding fields filled in for Jon Morris's Electronic Business Card.

Create a Contact

1. Select **Contacts** from the **Navigation Bar** and on the **Home** ribbon click **New Contact**.
    a. Keyboard shortcut - **Ctrl +Shift +C**
2. Type a name for the contact.
3. Enter other information that you want to include for the contact.
4. Save and Close.

> **Note** To specify how you want the contact's name to appear in the To... line of a message, type a name in the Display As box.

To enter multiple entries for a field, such as more than one phone number or e-mail address, click the down arrow next to the field.

If you have more than one mailing address for a contact, select the 'This is the mailing address check box' to establish which address is to be used during a mail merge.

Tip You can quickly create another contact with the same company information. In the current contact, on the Actions menu, click New Contact from Same Company.

Create a contact from another contact

You can create a new contact from an existing contact by **using the existing contact as a template, and then changing any of the information, as necessary.**

1. In Contacts, in Business Cards view, click the contact that you want to use as a template.

Note You can also complete this procedure in the Address Cards and Detailed Address Cards views.

2. Press **CTRL + C**, and then press **CTRL + V**.
3. In the Duplicate Contact Detected box, select the Add new contact option.
4. When you save a contact or an Electronic Business Card with the same name or e-mail name as one that already exists in your Contacts folder,

Note Microsoft Office Outlook displays a dialog box with options to either add the duplicate contact as a new contact or update the existing contact with the new information from the duplicate contact.

5. Click **Add.**
6. The new contact will appear in Business Cards view next to the contact you copied.
7. Double-click the new contact to open it, and then edit the information, as needed.
8. Click Save and Close.

Create a contact from an e-mail message that you receive

1. Open or preview the e-mail message that contains the name that you want to add to your contact list.
2. Right-click the name of the sender who you want to make into a contact, and then click Add to Contacts on the shortcut menu.

Note In Outlook, there is no option to add contact information automatically to Contacts or the Address Book when you reply to a contact.

Create a contact from an Electronic Business Card that you receive

When you save an Electronic Business Card received in an e-mail message, you create a new contact. If you already have a contact by the same name, you can save the duplicate as a new contact or update the original.

1. In an **open message**, **right-click the card**, and then click **Add to Contacts** on the shortcut menu. The new contact opens in the contact form.
    a. On the Contact tab, in the Save group, click Save & Close.
2. If you already have a contact with the same name, Outlook detects the duplicate. Do one of the following:
    a. Select **Add the new contact**. This **creates a duplicate contact**, including a contact form and Electronic Business Card.
    b. Select **Update the information**. Existing duplicate contacts are listed. Double-click the contact to update it, and then update the information on the contact form and save it.

Note The new contact information is now saved in Contacts and is available as an Electronic Business Card as well as in other views. You can make changes to the contact information both before and after you save it. To make changes to the card after you save it.

Note You can also right-click the attached .vcf file in the message header to open the shortcut menu and add the contact or choose other options.

If you click the Save & New option in the contact form, the open contact is saved, and a new, blank contact form opens.

Edit a Contact

Contact information changes frequently. Whether it's an updated address or phone number. Outlook puts an end to messy address books or card files. Your contact information will be neat and easy to read.

1. Open the Contact form
2. Double click the contact or right click and select Open
3. Edit the appropriate information
4. Save and Close

Delete a Contact

Your address book contains a number of contacts with whom you no longer do business.

By deleting those old contacts your address book will be less cluttered and you will save space on your hard drive.

1. Select the contact
2. Delete button on toolbar OR
3. Right click and select 'Delete'

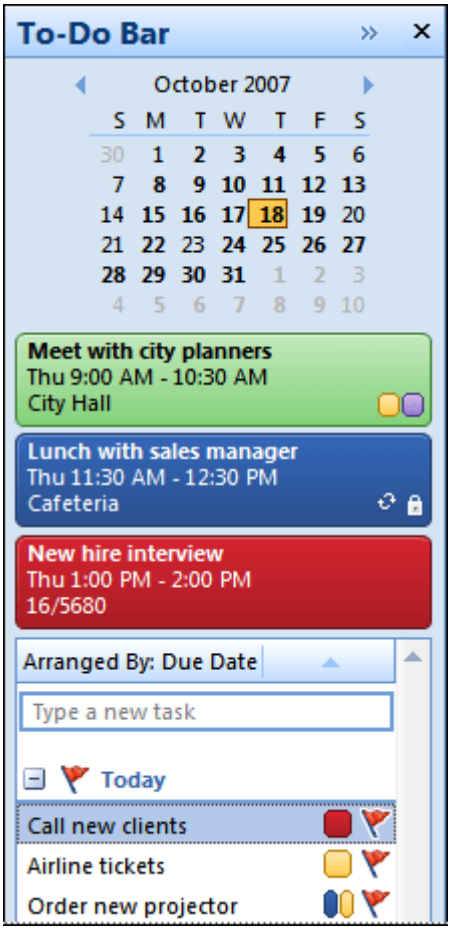
Print Contacts

4. Select the **'File tab'** and choose **'Print'**
5. Select a print style from the **Settings**
6. If necessary select **Print Options**
7. Click 'Print'

Unit 7 - Managing Tasks

You are in the middle of writing a message and think of something else that needs to be done. You could scribble yourself a note, hoping that it doesn't get lost in the shuffle.

A better option is to enter the task in Outlook. **You will then have an electronic reminder of what needs to be done and when.**



About Tasks and To-Do Items

A task is an item that you create in Outlook to track until its completion.

A to-do item is any Outlook item — such as a task, an e-mail message, or a contact — that has been flagged for follow-up.

By default, all tasks are flagged for follow-up when they are created, even if they have no start date or due date. Therefore, whenever you create a task, or flag an e-mail message or a contact, a to-do item is created automatically.

When you need to **quickly indicate that an item requires your attention at a later time, flagging is the best option.**

When you **flag an item**, it is **displayed with a flag in the Mail view**, in **Tasks**, in the **To-Do Bar**, and in the **Daily Task List in Calendar**.

Flagging a message or contact does not create a new task. Because the to-do item is still an e-mail message or contact after being flagged, you do not have the ability to assign it as a task to someone else, or indicate its progress or percentage of completeness.

A task can occur once or repeatedly. A task can repeat at regular intervals, or it can repeat based on the date that you mark the task complete. For example, you can create a recurring task to send a status report to your manager on the last Friday of every month, or create a recurring task to get a haircut one month after your last one.

Both tasks and to-do items appear in Tasks, in the To-Do-Bar, and in the Daily Task List in Calendar. No matter which view you are in, the To-Do Bar keeps you informed of your calendar, task, and to-do items.

There are several ways to create a new task in Outlook: -

1. Select **Tasks** from the **Navigation Bar** and on the **Home** ribbon click **New Task** in the **New** group
2. Enter a task in the **Type a new task** text box in the **To-Do Bar**
3. Type in any blank space in the **Daily Task List** in **Calendar**
4. Click and type in the **Type a new task** text box at the top of Tasks view.

Note: Of these, the fastest way is to use the To-Do Bar.

5. You can also create a task by **dragging an item, such as an e-mail message, to Tasks in the Navigation Pane**. A copy of the e-mail message is then created as a task. You must Save and Close the new task.
6. On the **Home** ribbon in the **New** group click **New Items** then select **Tasks**

Note: Item 6 can be carried out from Mail, Calendar, Contact, Tasks or Notes view

Whether you track tasks that are assigned to yourself (such as reminders to respond to e-mail messages), or track tasks that are assigned to other people (such as the progress of someone's project), Outlook tasks are your solution. You can quickly add and update tasks, or mark them as complete. With tasks incorporated into the Calendar view, you have a rich interface for keeping track not only of your appointments, but of the tasks that you need to complete on a given day as well.

Create a Task From the Home ribbon

1. In the **New** group on the **Home** ribbon point to **New Items**, and then click **Task**.
   a. Keyboard shortcut To create a new task, press **CTRL+ SHIFT+ K**
2. In the **Subject** box, type a name for the task.

> **Note** You have now entered enough information to create a task. The following steps are optional, but will help you better manage your tasks in Outlook.

3. On the **Task ribbon**, in the **Actions group**, click **Save & Close** or continue with the following steps to customize your task.
4. If you want, set the **Start date** and the **Due date** for the task.

> **Note** If you specify a Start date, the Due date field is automatically set to the same day. You can change the Due date field to any date that you want.

5. If you want to make the **task recur**, on the **Task ribbon**, in the **Recurrence group**, click **Recurrence**.
6. In the **Task Recurrence dialog box**, click the **frequency** (Daily, Weekly, Monthly or Yearly) with which the task should recur, and then do one of the following:
   a. Make the task recur based on a regular interval. In the Recurrence pattern section, select the options for the frequency interval that you want. Do not select Regenerate new task, or the task will not recur at regular intervals.
   b. Make the task recur based on completion date. Select Regenerate new task, and in the box, type the amount of time after which a new task must be generated.

Each time that you mark the task complete, a new task will be created based on your specifications.

> **Tip** This is your best choice when you do not want the next reminder for a task to appear until the previous one is marked as complete. If you do not mark the item complete, the next reminder will never appear. For example, if you have a reminder to pay your utility bill on the 15th of each month and you do not mark the occurrence on April 15th as complete, in May you will still see the not yet completed April 15th task. Only after you mark the April 15th task as complete does the May 15th occurrence of the task appear.

7. Click **OK** to close the Task Recurrence dialog box.
8. If you want to add a **reminder alert**, select the **Reminder check box**, and then enter the date and time for the reminder.
9. You can specify **a custom sound to be played** with your reminder. Click , click Browse, select the sound file to play, click Open, and then click OK. This changes the reminder sound only for this task.

10. If you want to **track your progress** on this task, in the Status, Priority, and % Complete boxes, enter the values that you want.

Note The 'Status' and '% Complete' fields are linked and when you change the value in either field, the value in the other field changes accordingly.

Status	% Complete
Not Started	0
In Progress	1-99
Completed	100
Waiting on someone else	0-100
Deferred	0-100

11. If you want to **assign a colour category to your task**, on the **Task** tab, in the **Options** group, click **Categorise**, and then click one of the colour categories on the menu. For more colour categories, click **All Categories**.

- The first time that you use a colour category, you are prompted to provide a name for the colour category that is more meaningful to you.
- You can create custom colour categories, associate custom colours with the colour categories, and assign shortcut keys to the colour categories. Click OK to return to the Task window.

Tip Changed your mind about a colour category assignment? Right-click the colour or name of the colour category, then click Clear Name of Category or Clear All Categories.

12. If your **task involves a person or organization in your Contacts**, you can create a quick link to the contact, by clicking Contacts at the bottom of the window, and then selecting an entry. Click OK to close the Select Contacts dialog box.

Note By default, Contacts linking does not appear on the message, contacts, and tasks windows. To turn on Contact linking, select the **File** tab, then click **Options**. On the **Calendar** group from the **Linking** section click **Show Contacts Linked to the current item** check box. Open your task to continue with this procedure.

13. If you do not want other people to see a shared task entry, on the **Task** ribbon, in the **Tags** group, click **Private**.

14. If you want to enter mileage, work hours, and other billing information, on the **Task** ribbon, in the **Show** group, click **Details**. Type the information in the **Total work**, **Actual work**, **Mileage**, and **Billing information** text boxes.

15. On the **Task** ribbon, in the **Actions** group, click **Save** and **Close**.

Create a Task or a To-Do Item From an E-Mail Message

There are several ways to turn an e-mail message into a task or a to-do item.

Do any of the following:

- **Flag an e-mail message for follow-up**

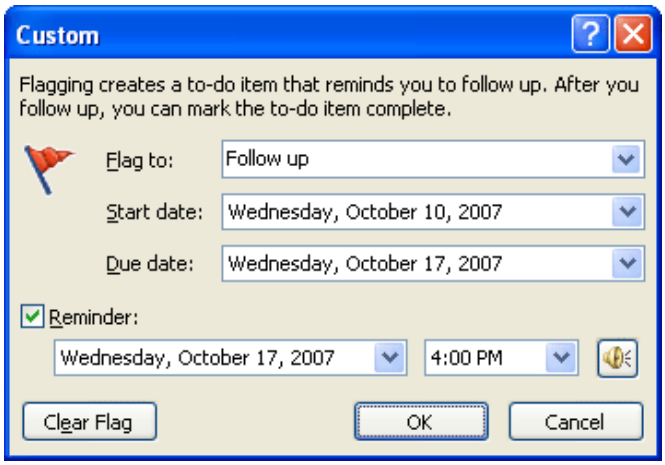
Flagging a message is the best option when you need to quickly mark an item for your attention at a later time. When you flag an item, it is displayed in the Mail view with a flag, in Tasks, in the To-Do Bar, and in the Daily Task List in Calendar.

Flagging a message or contact does not create a new task. Because the to-do item still remains an e-mail message or contact after being flagged, you do not have the ability to assign it as a task to someone else, or indicate its progress or percentage of completeness.

1. In Mail, right-click the flag column for an e-mail message.
2. Choose the **due date.**

Tip To add a follow-up flag quickly, click the flag column next to the e-mail message. A start date and due date of today are set automatically.

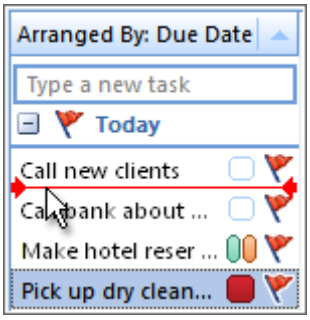
Note To change the reminder time, reminder sound, Start date, Due date, or the flag text that appears in the InfoBar, or to clear the reminder flag, right-click the flag column next to the e-mail message, and then click Custom or Add Reminder. Both options open the same dialog box, but when you use Add Reminder, the reminder check box is selected automatically.



- **Drag an e-mail message to the To-Do Bar to create a to-do item.**

> **Note** The To-Do Bar must be arranged by Start Date or Due date to use these procedures.

1. Click an e-mail message to select it, and then drag the message to the task list section of the To-Do Bar.
2. When you see a red line with arrows at each end positioned where you want to place the task, release the mouse button.



- **Drag an e-mail message to the Tasks button to create a new task.**

When you drag an e-mail message to Tasks in the Navigation Pane, you can use all of the features of a task item, and the contents of the e-mail message, except attachments, are copied to the body of the task. Even if the original e-mail message is later deleted, the task, including the copied contents, except attachments, of the e-mail message, is still available.

1. Click an **e-mail message** to select it, and then **drag it to the Task button** on the Navigation Pane.

> **Tip** To add the message as an attachment to the task instead of pasting the text into the task body, right-click the message and drag it to the task list. On the shortcut menu, click Copy Here as Task with Attachment.

2. **A new task item window appears**, and a copy of the e-mail contents is pasted into the task body. The subject of the e-mail message becomes the subject of the task. If you want, you can change the subject.

> **Note** You have now entered enough information to create a task. The following steps are optional, but will help you better manage your tasks in Outlook.

3. On the **Task ribbon**, in the **Actions group**, click **Save & Close** or continue with the following steps to customize your task.
4. If you want, set the **Start date** and the **Due date** for the task.

> **Note** If you specify a Start date, the Due date field is automatically set for the same day. You can change the Due date to a date that you want.

FOLLOW THE STEPS AS ABOVE TO…..

Create a To-Do Item From a Contact

Flagging a contact is the best option when you need to quickly mark a contact for your attention at a later time.

Flagging a contact creates a to-do item, with the text of the flag in the InfoBar. The flagged contact is also displayed in the Tasks list, To-Do Bar, and in the Calendar Daily Task List. *Flagging a contact does not create a new task item. Because the to-do item still remains a contact, you do not have the ability to assign it as a task to someone else, or to indicate its progress or percentage complete.*

1. In **Contacts**, **right-click** the contact.
2. Point to **Follow Up** on the shortcut menu, and then select the **due date**.

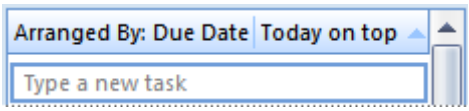
> **Tip** To change the reminder time, reminder sound, Start date, Due date, or the flag text that appears in the InfoBar, or to clear the reminder flag, click Add Reminder.

Create a task in the To-Do Bar

The To-Do Bar appears in all Outlook views by default. You can **turn the To-Do Bar on or off**. In addition, you can choose to display a minimized version of the To-Do Bar, which uses less screen space. When you turn the To-Do Bar on or off, or minimize it in a specific view, the setting applies only to that view. For example, if you turn off the To-Do Bar in the Mail view, it will remain off each time you are in the Mail view, including the next time you start Outlook. However, it remains on in other views such as Calendar, Notes and Tasks.

To toggle the To-Do bar on or off, from the **Layout** group in the **View ribbon**, click the **To-Do Bar**, and then click **Normal, Minimized, or Off.**

1. **To create a new task in the To-Do Bar**, click in the **Type a new task** text box (called the Task Input Panel, type a **subject** for the task, and then press **ENTER.**



By default, the task will be assigned a due date and start date, which are based upon the flag's **Set Quick Click** setting. When you first install Outlook, this setting is configured as **Today**.

If you create a task and change the flag to another Due date choice, any future tasks that you enter in the To-Do Bar will use the new setting. You can always override the choice that is displayed and pick another option. However, when you restart Outlook, the first task entered will default to the **Set Quick Click** flag setting.

Tip To change the default flag setting, right-click a flag in the flag column in any view, click **Set Quick Click**, and then choose the flag setting that you want. The options include No Date. Choosing the No Date flag makes the item appear in the No Date group in the To-Do Bar.

Note You have now entered enough information to create a task. The following steps are optional, but will help you better manage your tasks in Outlook.

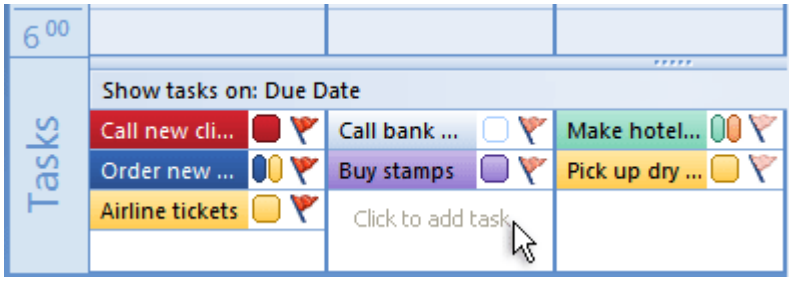
1. Continue with the following steps to customize your task by double-clicking the task in the To-Do Bar.
2. If you want, set the Start date and the Due date for the task.

3. If you specify a Start date, the Due date field is automatically set for the same day. You can change the Due date to a date that you want.

FOLLOW THE STEPS AS ABOVE TO….

Create a Task In The Daily Task List in Calendar

The Daily Task List appears only in the Outlook Calendar day and week views. To toggle the Daily Task List on or off, in Calendar, select the **View ribbon**, click **Daily Task List** in the **Layout** group, and then click **Normal, Minimized, or Off**.



To display only the total number of tasks, do one of the following:

- In **Calendar**, select the **View ribbon**, click **Daily Task List** in the **Layout** group, and then click **Minimized**
- Point to the **top edge of the Daily Task List**. When the pointer becomes a ↕, drag the edge to the **bottom** of the window.

> **Tip** To create new tasks in the Daily Task List, you must use the Normal Daily Task List setting.

1. In the Daily Task List, as your pointer hovers, Click to add task is displayed.
2. Click any blank space beneath a day column.
3. Type a subject for the task, and then press ENTER.

By default, the task will be assigned a Start date and Due date of the day in the column above the Daily Task List. In order to change the Start date or Due date of the task, you can drag the created task to the day that the task is due. Alternatively, instead of dragging the task, you can open the task and then change the start and due dates. To do so, you can right-click the task, and then click Open, or select the item, press ESC, and then press ENTER.

4. If you want to make the task recur, on the Task ribbon, in the Recurrence group, click Recurrence.

FOLLOW STEPS AS ABOVE TO….

Complete a Task

When you have completed a task or no longer need to follow up on an item, you can **mark it complete**. After it is marked complete, it will no longer display as an active task in Microsoft Office Outlook

Do any of the following:

- Click the **flag status column** in the message list, in Tasks, in the To-Do Bar, or in the Daily Task List in Calendar
  - Click the flag status column beside the item.
- **Right-click the task in Tasks**, in the To-Do Bar, or in the Daily Task List in Calendar
  - Right-click the task.
  - Click Mark Complete on the shortcut menu.
- Double-click the task in Tasks
  - Double-click the task to open it.
  - In the % Complete box, enter 100%.

The Status and % Complete fields are linked. If you change the value in one field, the value in the other field also changes, according to the values in the following table.

Status	% Complete
Not Started	0
In Progress	1-99
Completed	100
Waiting on someone else	0-100
Deferred	0-100

Note If the Complete field appears in the task list — as a column of check boxes headed by a check mark — you can select the check box for the task to mark it complete. If the Status field appears in the task list, you can click Completed in the drop-down list for the task.

Open an e-mail message marked with the task flag

1. Open the e-mail message.
2. On the Message ribbon, in the Tags group, click Follow Up  .
   a. Keyboard shortcut ALT + H + W + M
3. Click Mark Complete.

Difference between 'Mark Complete' AND 'Clear Flag'

- **Mark Complete** The item remains marked with a follow-up flag, but it is now displayed with a strikethrough. If the To-Do Bar or Tasks is configured to show all tasks and to-do items regardless of whether or not they are complete, you will continue to see the message until you delete it from your mail folders.
- **Clear Flag** The flag is removed from the e-mail message, and there is no record of the message ever appearing in the To-Do Bar and Tasks.

If you want to keep a record of completed items, use **Flag Complete**. However, once you delete the e-mail message, the entire item will completely disappear from all Outlook views

Skip an Occurrence of a Recurring Task

1. Open the specific occurrence that you want to skip.
2. On the Task ribbon, in the Recurrence group, click Skip Occurrence.

Note If you set the recurring task to end after a specified number of occurrences, each occurrence you skip reduces the number of remaining occurrences by one.

End Recurrence of a Task

1. Open the recurring task.
2. On the Task ribbon, in the Recurrence group, click Recurrence.
3. Click Remove Recurrence.