

Outlook:

Handouts



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Outlook:

Handouts:

Outlook **Today**

Outlook **E-mail**

Outlook **Contacts**

Outlook **Calendar**

Outlook **Tasks**

Outlook **Notes & Journal**



Microsoft Outlook: Outlook Today

Customize Outlook Today

In the **Navigation Pane**, look for this logo  and your name. Click on your name. This will open **Outlook Today**. On the Outlook Today page, look for the black bar with the date. Click **Customize Outlook Today**.

See example at right.

Do any of the following:

Change how many appointments appear

In the **Calendar** area, enter a number of days. The appointments that take place within this time span will appear on the Outlook Today page under Calendar. Click **Save Changes**.

Change the background and layout

In the **Styles** area, click an option in the Show Outlook Today in this style list. The graphic below the list shows how the Outlook Today page will appear. Click **Save Changes**.

Change the tasks that appear

In the **Tasks** area, click the option you want. Click **Save Changes**.

Change the e-mail folders that appear

In the **Messages** area, click Choose Folders. Select the check box next to the folders you want to display on the Outlook Today page. Click **Save Changes**.

Sort your task list

In the **Tasks** area, click an option in the Sort my task list by list. To sort tasks by a second criterion, click an option in the Then by list. Click **Save Changes**.

Make Outlook Today your default page

In the **Startup** area, select the When starting, go directly to Outlook Today check box. Click **Save Changes**.

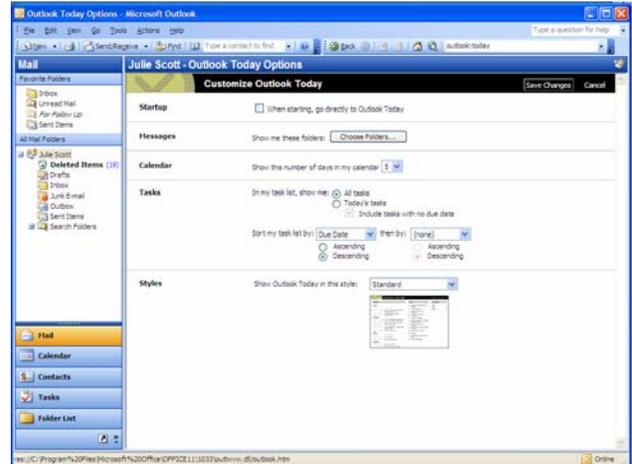
Outlook Menu Items:



Outlook menu bar

Outlook Today Options

- New Mail Message
- Print
- Send/Receive E-mail
- Open Find Menu Bar
- Address Book
- Find a Contact



Above: Customize Outlook Today

Check your spelling in Outlook:

On the **Tools** menu, click **Options**. Click **Preferences**, and then on the **Spelling** tab, select options to allow Outlook to correct your spelling, including creating a custom dictionary of frequently used terms and choosing a dictionary in another language to check your spelling.

Quick Check your spelling in Outlook:

To quickly check spelling in an open item, press **F7**.

Use Outlook Today to access the Internet:

- To quickly go to your Internet home page (NCOE) click on the house icon.
- To go to a specific website, type the address in the box to the left of the Search the Web icon.
- To go to a recently viewed website,

Internet Options

- Back (to previous window/view)
- Start Page (your Internet homepage – NCOE)
- Search the Web (opens MSN search)
- Choose from recent websites

Microsoft Outlook: E-mail Basics

Sending E-mail Messages

1. On the **File** menu, choose **New**, click **Mail Message**.
2. Enter recipient names in the **To:**, **Cc:**, or **Bcc:** (blind carbon copy) boxes. Names should be separated with a semicolon (;).
Note: Recipients in the Bcc: boxes also get the message; however, the names of the recipients in the Bcc box aren't visible to other recipients.
3. To select recipient names from a list in the **Address Book**, click the To or Cc button, or click the Address Book icon on the menu bar.
4. In the **Subject** box, type the subject of the message.
5. In the message body, type the message.
6. Click **Send**.

To set message options, do one or more of the following:

Change the importance level

Very important. Click the red exclamation point icon.
Not important. Click the blue down arrow icon.

Make a message unavailable after a specified date

Click Options. Under **Delivery options**, select the **Expires after** check box, and then enter the expiration date you want.

Delay delivery of the message

Click Options. Under Delivery options, select the Do not deliver before check box, and then enter the delivery date and time you want. To enter a time, you must type in the box.

Save a copy of this message to a folder other than Sent Items

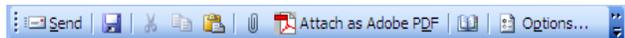
In the message, click Options. Under Delivery options, select the Save sent message to check box. Click Browse, and then click the folder you want.

Create a message from a contact

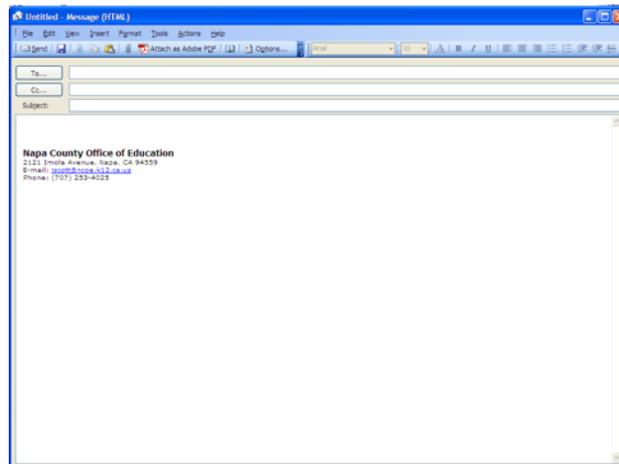
1. In **Contacts**, select the contact, click the **Actions** menu, and then click **New Message to Contact**.
2. Send as usual.

Add an Attachment

1. You must be creating a new message to insert an attachment.
2. Click in the body of the item, and then click **Insert > File**, or click the Attachment icon (paperclip).
3. Select the file that you want to attach, and then click **Insert**.
4. In a new message, click **Send**, and in any other type of item, click **Save and Close**.



E-mail menu bar



You can automatically add a signature!

Include a signature automatically in outgoing messages

An e-mail signature consists of text and or pictures, or both, that are automatically added at the end of an outgoing message. You can include any text that you want, such as personal or business contact information, in a custom signature that you create. You choose the text, formatting, and style of the information.

Create a signature in Outlook

1. In the main Outlook window, on the **Tools** menu, click **Options**, and then click the **Mail Format** tab.
2. In the **Compose** in this message format list, click the message format that you want to use the signature with.
3. Under **Signatures**, click **Signatures**, click **New**.
4. In the *Enter a name for your new signature* box, type a name.
5. Under *Choose how to create your signature*, select the option that you want. Click **Next**.
6. In the Signature text box, type the text that you want to include in the signature.
7. To change the paragraph or font format, select the text, click **Font** or **Paragraph**, and then select the options that you want.
8. Click **Finish** when you are done editing the new signature.

Insert a signature in a message

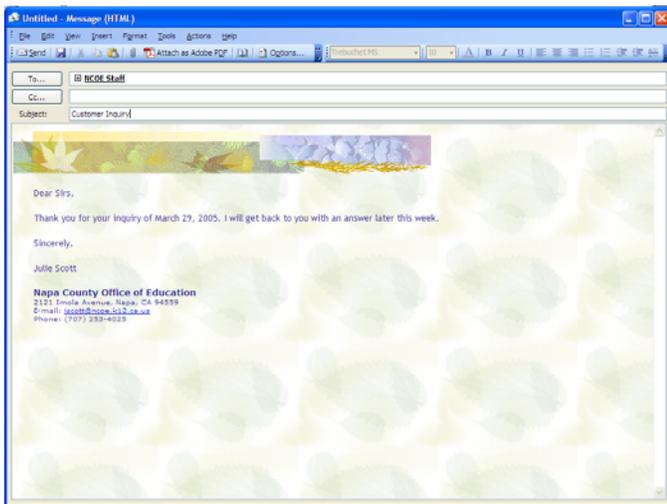
1. In the main Outlook window, on the **Tools** menu, click **Options**, and then click the **Mail Format** tab.
2. In the *Compose in this message format* list, click the message format you want to use the signature with.
3. Under **Signatures**, select an e-mail account, and then choose the signatures that you want to use for new messages and for replies and forwards. You can use a different signature for each.

Microsoft Outlook: E-mail Basics

Using E-mail Stationery

Stationery and themes are a set of unified design elements and color schemes you want to apply to messages. They specify fonts, bullets, background color, horizontal lines, images, and other design elements you want to include in outgoing e-mail messages. In Microsoft Outlook, you choose from a predefined list of stationery or modify one of the patterns in the list to suit your needs. You can also create new stationery or download it from the Web. Outlook stationery is available only if you use HTML as your message format.

If you want to automatically add text to the e-mail messages you send, such as a boilerplate response to messages, use a signature in addition to the stationery or theme.



Creating E-mail Stationery

1. From the main Outlook window, on the **Tools** menu, click **Options**, and then click the **Mail Format** tab.
2. In the *Compose in this message format* list, click **HTML**.
3. Click **Stationery Picker**, and then click **New**.
4. In the *Enter a name for your new stationery* box, enter a name.
5. Under *Choose how to create your stationery*, select the option you want.
6. To select a file to base your stationery on, type the path and file name in the *Use this file as a template* box, or click **Browse** to select from a list.
7. Click **Next**.
8. Select the options you want to use.

Save stationery from a message

1. In the message, on the **File** menu, click **Save Stationery**.
2. Enter a file name, and then click **OK**.

Note: When you save stationery in Microsoft Outlook, it's saved to the stationery list in Microsoft Word, too.

Stop using automatic stationery

Do one of the following:

Stop using automatic stationery for all new messages you create

1. Turning off Microsoft Outlook stationery will turn off Microsoft Word stationery, too.
2. From the main Outlook window, on the **Tools** menu, click **Options**, and then click the **Mail Format** tab.
3. In the *Use this stationery by default* list, click **None**.

Stop using automatic stationery for one new message you create

1. On the **Actions** menu, point to *New Mail Message Using*, and then click **HTML (no stationery)**.

Distribution Lists

Create a Distribution List

1. On the **File** menu, point to **New**, and then click **Distribution List**.
2. In the **Name** box, type a name.
3. Click **Select Members**.
4. In the *Show names from the list*, click the address book that contains the e-mail addresses you want in your distribution list.
5. In the *Type name or select from list* box, type a name you want to include. In the list below, select the name, and then click **Members**. Do this for each person you want to add to the distribution list, and then click **OK**.
6. If you want to add a longer description of the distribution list, click the **Notes** tab, and then type the text.
7. The distribution list is saved in your **Contacts** folder by the name you give it.

Create a distribution list by copying names from an e-mail message

1. In the e-mail message you want to copy the names from, select the names in the **To** or **Cc** box.
2. On the **Edit** menu, click **Copy**.
3. On the **File** menu, point to **New**, and then click **Distribution List**.
4. In the **Name** box, type a name for the list.
5. Click **Select Members**.
6. In the *Add to distribution list*, right-click, and then click **Paste** on the shortcut menu.

Import a distribution list from the Global Address List

1. On the **Tools** menu, click **Address Book**.
2. In the *Show names from the list*, click **Global Address List**.
3. In the *Type name or select from list* box, type the name of the distribution list you want to import into your **Contacts** folder.
4. In the list below, double-click the name.
5. Click **Contacts**. Click **OK**.

Microsoft Outlook: E-mail Basics

Using the Out of Office Assistant

Automatically Reply to Incoming Messages While Out Of Office

1. In **Mail**, on the **Tools** menu, click **Out of Office Assistant**.
2. Click *I am currently Out of the Office*.
3. In the *AutoReply only once to each sender with the following* text box, type the message that you want to send to others while you are out.

If you want, create rules to manage your incoming mail by doing the following:

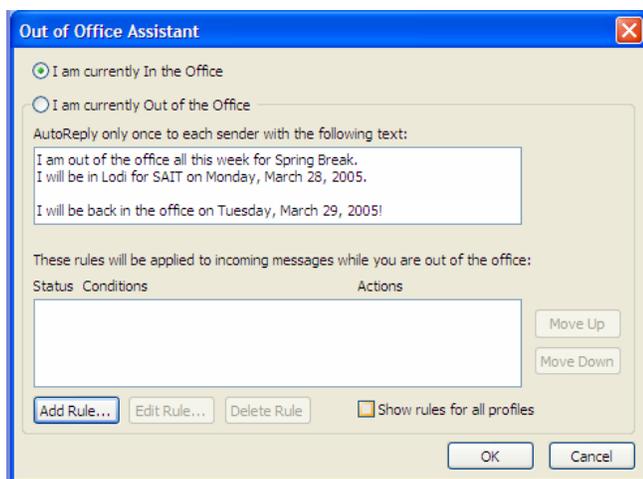
1. On the **Tools** menu, click **Out of Office Assistant**.
2. Click **Add Rule**.
3. Under *When a message arrives that meets the following conditions*, specify the conditions of the rule that the message must meet for the action to occur.
4. To specify more conditions, click **Advanced**, select the options that you want, and then click **OK**.
5. To specify that this rule must be the last one applied, select the *Do not process subsequent rules* check box.
6. Under **Perform these actions**, select the options that you want. You can select more than one option.

Turn Out Of Office Reply Off

1. In **Mail**, on the **Tools** menu, click **Out of Office Assistant**.
2. Click *I am currently in the Office*. Click **OK**.

Note: When you open Outlook for the first time after being away, it will automatically prompt you to turn off your Out Of Office Reply.

Note: If you specify that a message must be deleted, rules that follow the delete rule in the list of rules in the Out of Office Assistant dialog box do not affect the message.



Additional E-mail Tips and Tricks

Quickly read messages without opening them:

To see the first three lines of each message in the message list, on the **View** menu, click **AutoPreview**. To see the complete message to the right of the message list, on the **View** menu, point to **Reading Pane**, and then click **Right**.

Open several messages at the same time:

Hold CTRL while you click each message. After you select the messages, on the **File** menu, point to **Open**, and then click **Selected Items**

Delete names from the AutoComplete list

Select the unwanted name by using the UP ARROW or DOWN ARROW key and then press DELETE.

See more messages with single-line view

Change from multiline view to single-line view. On the **View** menu, point to **Arrange By**, and then click **Custom**. Click **Other Settings**. Clear the Use multi-line layout in widths smaller than n characters check box.

Want to turn off New Mail Desktop Alerts?

On the **Tools** menu, click **Options**, click the **Preferences** tab, click **E-mail Options**, and then click **Advanced E-mail Options**. Under: *When new items arrive in my Inbox*, clear the *Display a New Mail Desktop Alert* (default Inbox only) check box.

Set Message Delivery Options:

For example, you can make a message unavailable to recipients after a specific date:

To set the expiration date on a message you are composing, click **Options**. Under **Delivery** options, select the **Expires after** check box, and then in the lists, select the date and time you want the message to expire.

Receive notifications when messages you send are delivered or read:

On the **Tools** menu, click **Options**, and then click the **Preferences** tab. Click **E-mail Options**, and then click **Tracking Options**.

Jog your memory with a follow-up flag:

Create a follow-up flag as a reminder to follow up on a message. On the **Actions** menu, click **Follow Up** and click the flag color of your choice

Turn auto replies on and off with the Out of Office Assistant

Microsoft Outlook: E-mail Tips

Sorting Your E-mail

Sort messages alphabetically by sender name:

To sort, click Arranged By and then click From. To reverse the alphabetical order, click From again. To sort by Subject line, click Subject. You can sort this way in any table in Outlook.

To quickly mark a message as read:

Right-click the message and then click **Mark as Read**.

Get a different view of the way that Outlook groups messages:

By default, Outlook groups messages by periods of time such as Today, Yesterday, and Last Week. To collapse a section to see only the group heading, select any message and then press the LEFT ARROW key. The RIGHT ARROW key expands the group.

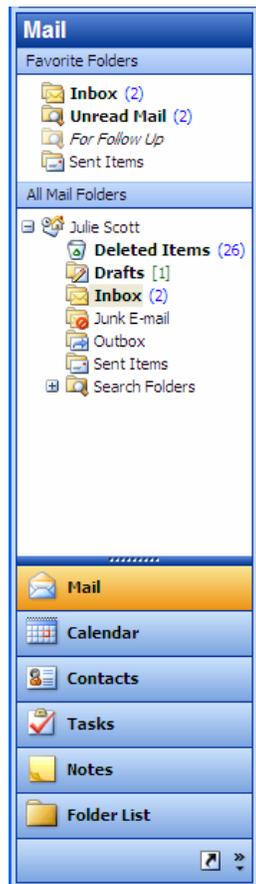
View all your unread messages in the Inbox

On the View menu, point to Arrange By, point to Current View, and then click Unread Messages in This Folder.

Access the different e-mail folders using the Mail Task Pane

Remember, mail is not really gone when you delete it. To remove old mail from your computer:

1. Open the **Deleted Items** folder
2. Click on the first e-mail. Type CTRL+A to **select all** the mail in the folder.
3. **Delete**. (Right click and choose Delete, or click on the Delete icon from the menu bar.)
4. Now the items are *really* gone... except to the FBI, who could search your hard drive and still find traces of the files!



Mailbox Maintenance

Does your mailbox need a quick cleanup?

On the **Tools** menu, click **Mailbox Cleanup**. Select options to find items that are old or large and then move or delete them. Click **AutoArchive** to move old items to Archive Folders, or click **Empty** to permanently delete items from your **Deleted Items** folder.

Start fresh! Clear your address history

To clear your AutoComplete cache, open the C:\Documents and Settings\user name\Application Data\Microsoft\Outlook folder, and then delete the profile_name.nk2 file. Outlook recreates this file as you type new addresses.

Shortcuts for Outlook E-mail

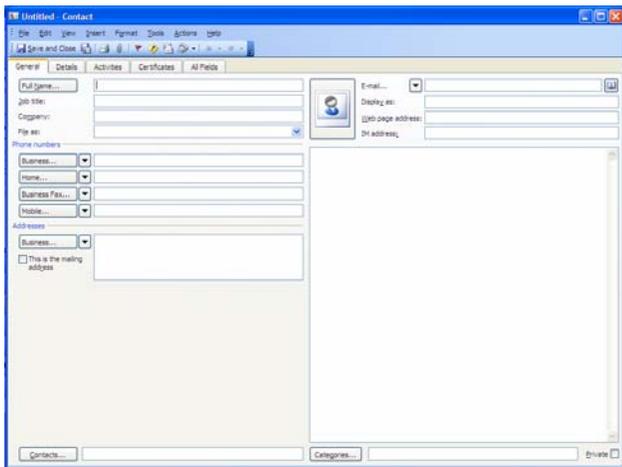
To do this	Press
Switch to Inbox	CTRL+SHIFT+I
Switch to Outbox	CTRL+SHIFT+O
Send	ALT+S
Reply to a message	CTRL+R
Reply all to a message	CTRL+SHIFT+R
Mark a message as not junk	CTRL+ALT+J
Go to the next message	UP ARROW
Go to the previous message	DOWN ARROW
Compose a new message	CTRL+N
Open a received message	CTRL+O
Display the Address Book	CTRL+SHIFT+B
Add a Quick Flag to a message	INSERT
Display the Flag for Follow Up dialog box	CTRL+SHIFT+G
Mark as read	CTRL+Q

Microsoft Outlook: **Contacts**

Create A Contact

1. On the **File** menu, point to **New**, and then click **Contact**.
2. Type a name for the contact.
3. Enter the information you want to include for the contact.
4. You can specify how you want the contact's name to appear in the To: line of a message by typing the name in the **Display As** box.
5. You can specify the contact's instant messaging address in the IM address box.
6. To enter multiple entries in a field, such as more than one address or e-mail address, click the down arrow next to the field.
7. If you have more than one address for a contact, to establish which address is used during mail merge, select the This is the mailing address check box.

Enter Contact information in the Contacts Box



View Contacts

To change how you view contacts:

1. Click on **Contacts** on the **Task Pane**.
2. Under **Current View** click on the view you prefer: address cards, phone list, category, or company.
3. Choosing **By Company** is the easiest way to view many contacts by school or organization. Be sure to be consistent with the company name when you create a contact or they will be listed separately.

Print Contact Information

Your contacts will print differently depending on the Current View you are in. For each view, the **Print** dialog box will display different print options.

Share Contacts

1. In **Contacts**, in the Navigation Pane, click **Share My Contacts**.
2. To Specify the people who can access your Contacts, click **Add**.

3. In the **Add Users** dialog box, in the *Type Name or Select from List box*, enter the name of the person whom you want to grant sharing permissions to.
4. Under **Add Users**, click **Add**, and then click **OK**.
5. In the Name box, click the name of the person you just added.
6. Under **Permissions**, in the **Permission Level list**, click the permission level that you want. *For details about permission levels, see Outlook folder permissions in the Help Menu.*
7. You can create custom permissions by selecting the check boxes and options under Permissions.
8. **Important:** If you select the Private check box on a Contact item in Microsoft Office Outlook 2003, do not grant Read permission to your Contacts folder to anyone whom you do not want to see private items. A person who is granted Read permission to access your folders could use programmatic methods or other e-mail applications to view details in a private item.

Using vCards

(virtual business cards)

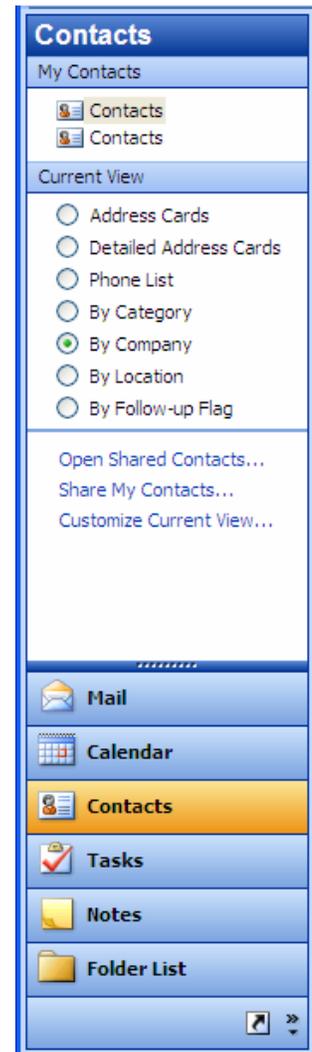
Outlook supports the use of vCards, the Internet standard for creating and sharing virtual business cards. You can save a contact as a vCard and send it in an e-mail message. You can also add a vCard to your e-mail signature.

Create A vCard from a Contact

1. Open the contact you want to save as a vCard.
2. On the **File** menu, click **Export to vCard file**.
3. Type a name in the File name box, and then click **Save**.

Send a vCard

1. In **Contacts**, click the contact you want to send as a vCard, and then on the **Actions** menu click **Forward as vCard**.
2. If the **Forward as vCard** command is not available, click **Forward**.



Microsoft Outlook: **Contacts**

Contacts tips

Quickly dial a phone number for a contact

Right-click the contact, and then on the shortcut menu, click Call Contact.

Add a new contact from an e-mail message

Open the message. In the From field, right-click the name you want to make into a contact. On the shortcut menu, click Add to Outlook Contacts.

Create a task related to a contact

Click the contact, click the Actions menu, and then click New Task for Contact.

Are there phone numbers that you have Outlook call frequently?

Add them to a speed dial list. On the Actions menu, point to Call Contact, click New Call and then click Dialing Options.

Quickly move through contact address cards with the arrow keys

Press **HOME** to move to the first card. Press **END** to move to the last card. Use the arrow keys to move up, down, and across the columns.

Send a message fast to a contact

Click the contact and then on the Actions menu, click New Message to Contact.

Quickly change the number of columns of contacts in your Contacts list

Just drag one of the vertical dividers that separate the columns.

Quickly schedule a meeting with a contact

Click the contact and then on the Actions menu, click New Meeting Request to Contact.

Quickly add contact information that isn't represented by existing fields

To add custom fields, in the contact, on the All Fields tab, click New and then specify the field's name, type, and format.

Quickly create a contact with the same company name and address as another contact

Select the existing contact in your Contacts list, and then on the Actions menu, click New Contact from Same Company.

More About Distribution Lists

Delete A Distribution List

In **Contacts**, click the contact card you want. On the **View** menu, point to **Arrange By**, point to **Current View**, and then click **Customize Current View**. Click **Fields**. In the **Show these fields in this order** box, click the field you want to remove. Click **Remove**.

Send a distribution list

Open a new message. Click the message body. On the **Insert** menu, click **Item**. In the **Look in** list, click the folder that contains the distribution list that you want to send. Distribution lists are saved in the **Contacts** folder by default. In the **Items** list, click the distribution list that you want to send, and then click **OK**. Send the message.

Note: If you want to send a distribution list to someone, and the distribution list contains members from the Global Address List, be sure that the recipient of the distribution list also uses that same Global Address List.

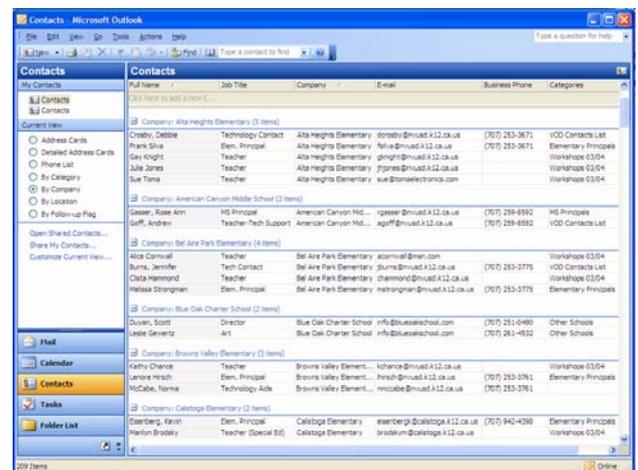
Send a message to PART of a distribution list

On the **File** menu, point to **New**, and then click **Mail Message**. Click **To**, and then in the **Type Name or Select from List box**, enter the distribution list that contains the people you want to send a message to. Click **OK**. Click the plus sign (+) next to the name of the distribution list to show the individuals on the list, and then delete the names that you do not want the message sent to.

Note: Distribution lists are identified with .

Note After you expand a distribution list, the distribution list name is replaced with all the individual names on the list. You cannot collapse the names back to the distribution list name.

You can choose how you view your Contacts List! Choose from address cards, phone list, and company (shown below).



Microsoft Outlook: Calendar

Scheduling Events & Appointments

Schedule An Appointment

An appointment is an activity that lasts less than 24 hours.

1. On the **File** menu, point to **New**, and then click **Appointment**.
2. In the **Subject** box, type a description.
3. In the **Location** box, enter the location.
4. Enter start and end times.
5. Select any other options you want.
6. To make the appointment recur, click **Recurrence**.
7. Click the **frequency** (Daily, Weekly, Monthly, Yearly) with which the appointment recurs, and then select options for the frequency.
8. Click **OK**.
9. Click **Save** and **Close**.

Schedule An Event

An event is an activity that lasts 24 hours or longer.

1. In **Calendar**, on the **Actions** menu, click **New All Day Event**.
2. In the **Subject** box, type a description.
3. In the **Location** box, enter the location.
4. Select any other options you want.
5. To indicate to people viewing your calendar that you are **out of office** (Blocks of time marked out of office appear with a solid availability indicator and a shaded appointment background, and they are shown as unavailable when other people view your Calendar.) instead of **free** (Free time appears with a clear availability indicator and is seen as available when others view your Calendar. An appointment of zero duration, while visible in the selected block of time when viewing days, shows as free time to others.), in the Show time as list, click Out of Office.
6. If the event lasts longer than one day, change the values in the **Start** time and **End** time boxes.
7. To make the event recur, on the **Actions** menu, click **Recurrence**, select the options you want, and then click **OK**.
8. Click **Save** and **Close**.

Print a Blank Calendar

1. On the **File** menu, point to **New**, and then click **Folder**.
2. Type a name for the folder.
3. In the **Folder** contains list, click **Calendar** Items.
4. In the **Select** where to place the folder list, click **Calendar**, and then click **OK**.
5. On the **Go** menu, click **Folder List**.
6. In the **Folder** List, click the new folder you just created.
7. On the **File** menu, point to **Page setup**, and then click the print style you want.
8. Select the print style options you want, and then click **Print**.

Add and Remove Holidays

Add Holidays:

1. On the **Tools** menu, click **Options**, and then click **Calendar Options**.
2. Under **Calendar options**, click **Add Holidays**.
3. Select the check box next to each country/region whose holidays you want to add to your Calendar, and then click OK. Your own country/region is automatically selected. By default, no holidays are loaded when you begin using Microsoft Outlook.
4. The holiday information provided with Office Outlook 2003 includes calendar years 2003 through 2007.

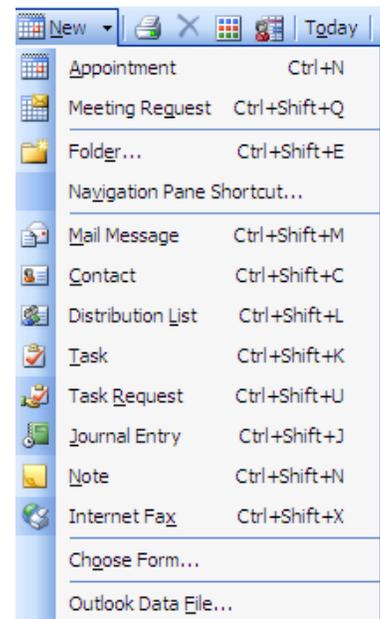
Remove holidays

1. In **Calendar**, on the **View** menu, point to **Arrange By**, point to **Current View**, and then click **Events**.
2. Select the holidays you want to remove. To select multiple rows, press the CTRL key and click subsequent rows.
3. Click **Delete** on the Standard toolbar. 

Quick Tip: To quickly remove all of the holidays for a country/region, click the Location column heading to sort the list of events so that it displays all of the holidays for a country/region together.

*Use the **New** menu to quickly add new appointments, tasks, contacts, e-mails, notes, etc.*

*Note the **Shortcut Keys** for each item.*



Microsoft Outlook: Calendar

Scheduling And Managing Meetings

Schedule A New Meeting

1. In **Calendar**, on the **Actions** menu, click **Plan a Meeting**.
2. Click **Add Others**, and then click **Add from Address Book**.
3. In the *Type name or select from list* box, enter the name of a person or resource you want at the meeting.
4. For each name entered, click **Required**, **Optional**, or **Resources**. (The Required and Optional attendees appear in the To box on the Appointment tab, and Resources appear in the Location box. To get details on a conference room, click it in the Resources list, and then click Properties.) Click **OK**.
5. Click a time when all invitees are available. You can use **AutoPick Next** to find the next available free time for all invitees.
6. Click **Make Meeting**.
7. In the **Subject** box, type a description.
8. If you did not schedule a room, enter the location in the Location box.
9. If you want to make the meeting recurring, click **Recurrence**, and then select the recurrence pattern.
10. Select any other options you want.
11. Click **Send**.

- To send agendas or meeting minutes, attach a file to your meeting request.
- You can prevent the recipients from sending you responses. In the meeting request, on the Actions menu, click **Request Responses** to clear the check box next to it.

Accept/Decline A Meeting Request

Open the meeting request or notification. To view your calendar, click **Calendar**. A new meeting request will appear as a tentative on your calendar.

Do one of the following:

Accept, tentatively accept, or decline

1. Click Accept, Tentative, or Decline.

Send your response with no comments

1. Select Send the response now, and then click OK.

Include comments with your response

1. Select Edit the response before sending.
2. Type your comments, and then click Send.

Don't send a response

1. Select Don't send a response, and then click OK. The meeting is added to your calendar, but the organizer will not know the choice you made. You also will not receive any updates to the meeting request.

Propose a New Meeting Time

1. Click Propose New Time.
2. Click a time when all invitees are available. You can use AutoPick Next to find the next available free time for all invitees.
3. Click Propose Time. Click Send.

Whenever you make a counter proposal, it is sent with a default message saying that you want to propose a new time, but that 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 by doing the following:

1. In the Tools menu, click Options, and then click Calendar Options.
2. In the Use this response when you propose new meeting times list, click the setting you want.

: You can also change this setting for individual meetings. In the open meeting request, on the Action menu, click either Decline and Propose a New Time or Tentative and Propose a New Time.

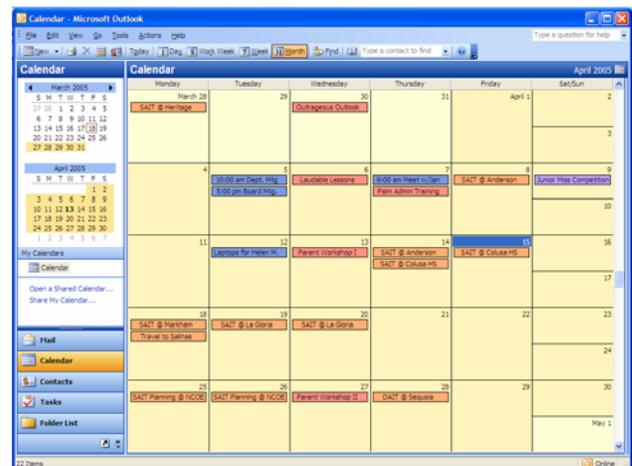
Note: To change your acceptance later, open the item in Calendar, and select Accept, Tentative, Decline, or Propose New Time. For a request that you declined, check your Deleted Items folder, or ask the organizer to send you a new request.

Want to delegate your "busyness" to someone else?

Check out the tutorial online at:

<http://office.microsoft.com/training/training.aspx?AssetID=RC010329611033>

View your calendar items in hourly (day), 5 day work week, 7 day week, or month view!



Microsoft Outlook: Calendar

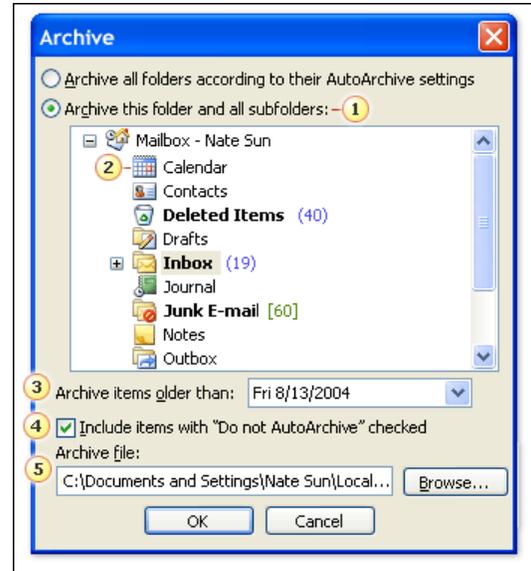
Archive your calendar items

With Outlook, you can easily track appointments, meetings, and events. Over time, all of your calendar items may start to add up to a significant amount of items and occupy a considerable amount of space in your data file. You can reduce the number of items saved in either one of two ways — archiving or deleting.

Archiving deletes items from your data file but first makes a backup of the items in another Outlook data file. You can configure Outlook to automatically run AutoArchive at specified intervals, or you can manually archive items. **Deleting** removes items from your data file without making a backup.

1. On the File menu, click Archive.
2. Click Archive this folder and all subfolders.
3. Caution If you created other calendars below the default calendar, this setting will archive items from all calendars.
4. In the folder list, select the Calendar folder.
5. In the Archive items older than list, select the date you want. To archive everything, select a date in the future.
6. Select the Include items with "Do not AutoArchive" checked check box.
7. Caution Selecting this check box will archive everything, including items you have marked as an exception to AutoArchiving.
8. You can accept the file location where the archive file is saved or browse to a different folder and provide the file name of your choice.
9. Note We recommend that you make a note of this location so you can easily find it later, if needed.
10. Click OK.
11. The archive will begin. On the Outlook status bar, you will see the menu Archiving. When you click

Archiving, you have the option of cancelling the archive in progress. Any items already archived up to that point will remain in the archive file.



- 1 All items in the selected folder and items in any subfolder are included in the archive.
- 2 Click Calendar for calendar items.
- 3 Select a date in the future to archive all items.
- 4 When you select the Include items with "Do not AutoArchive" checked check box, all items are archived regardless without exception.
- 5 Location of file name of the archive file.

Calendar Toolbar:



- New Appointments, tasks, etc.
- Print
- Delete
- Calendar Coloring
- View Group Schedules
- Jump to Today
- One day view (hourly)
- 5 Day Work Week
- 7 Day Week
- Month View
- Find Contact

Microsoft Outlook: **Calendar**

Calendar tips

Quickly display several days side by side in Calendar

In the date picker, drag over the dates that you want to view.

Contact meeting attendees with a reminder or other message

Open the original meeting request, click the Actions menu, and then click New Message to Attendees.

Show Saturday and Sunday in separate boxes in your monthly calendar

To show weekend days in separate boxes in the Month view, right-click anywhere in Calendar view, and then click Other Settings. Clear the Compress weekend days check box.

Abbreviate when entering meeting times

When you enter appointments in the Calendar, you can save time by typing abbreviations and allowing Outlook to fill in the rest. For example, if you want to enter a 6:00 P.M. meeting, open a new meeting request and then type 600p. You can also use phrases such as "tomorrow" or "next Monday," and Outlook automatically inserts the correct date.

Quickly create an appointment in Calendar

Click the day, drag over the block of time when the appointment occurs, and then type a description.

Use your e-mail signature for meeting requests

On the Insert menu, click Signature and then click the signature that you want to use.

Let Outlook find a meeting time when all attendees are available

On the Scheduling tab, type the names of the attendees in the All Attendees list, and then click AutoPick Next.

Quickly create an all-day event in Calendar

Click the day heading that you want, and then type the name of the event. If the event lasts several days, click the first day heading, drag across all days, and then type the event name.

Quickly switch between viewing a day, week, or month in Calendar

Click the day, click to the left of the week row, or click the day of the week heading.

Quickly move an appointment

Drag it to a new date or time in your Calendar or in the date picker.

Change the time periods in the Calendar grid

You can change the default setting for 30-minute time slots to 5-, 6-, 10-, 15-, or 60-minute time slots. Right-click the Calendar, click Other Settings, and then click the number you want from the Time Scale list.

Need consensus on a meeting time? Let invitees propose new meeting times

On the Tools menu, click Options. Click Preferences and then click Calendar options. In the Calendar options section, select the Allow attendees to propose new meeting times for meetings you organize check box.

Change the number of days shown in Calendar

In Calendar view, press ALT+number, where number represents the number of days to show in the view between 1 and 9. Use 0 for a 10-day view.

Track all attendees even if you can't send them a meeting request

On the Scheduling tab, in the All Attendees list, click the envelope next to the name, and then click Don't send meeting to this attendee.

Quickly turn an appointment into a meeting

Open a new appointment, and on the toolbar, click Invite Attendees. Type attendees' names in the To box.

Quickly share meeting notes with attendees

Open the meeting request in Calendar, add the notes, save it, and then drag the item to your Inbox. Drag the meeting attendees' names from the body of the message to the To box, and then send the message.

Change the time interval of a reminder to give you more time to prepare

On the Tools menu, click Options. Click Preferences, and then, under Calendar, you can choose a reminder to alert you from minutes to weeks ahead of time.

Want to see your Calendar while you're looking at the Inbox?

In the Navigation Pane, right-click the Calendar button, and then click Open in New Window on the shortcut menu.

Quickly copy an appointment in your Calendar

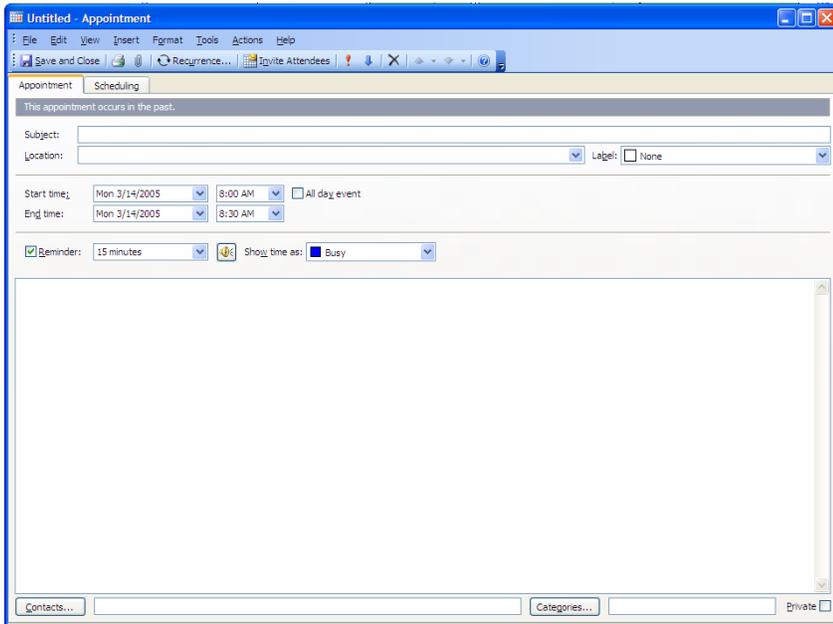
Hold down CTRL and drag the appointment to a new time or date.

Microsoft Outlook: **Calendar** Tips

Calendar tips

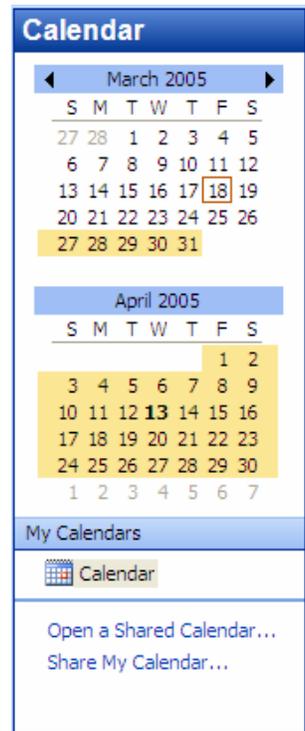
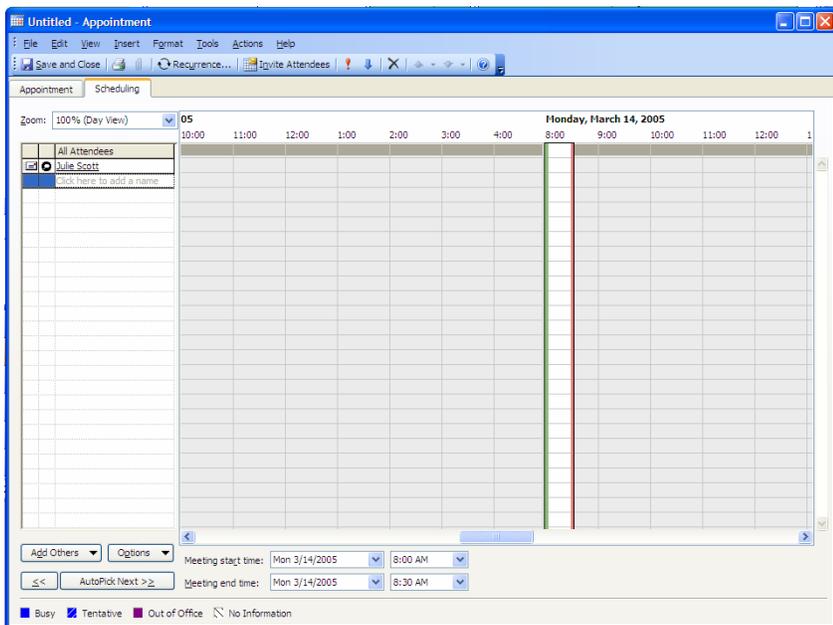
Enter information about your appointment or event in the **Appointment Box**.

You can set a timed reminder (alarm), label the event in color on your calendar, choose Contacts, and add notes.



In Appointments, click on the **Scheduling** tab to monitor **Meetings**.

You can keep track of meeting times, attendees, etc.



Use the Calendar task pane to skip quickly from month to month...

...and to access shared calendars.

Microsoft Outlook: Tasks

Working with Tasks

A task is a personal or work-related errand you want to track through completion. A task can occur once or repeatedly (a recurring task). A recurring task can repeat at regular intervals or repeat based on the date you mark the task complete. For example, you might want to send a status report to your manager on the last Friday of every month, and get a haircut when one month has passed since your last haircut.

Task assignments

In addition to creating your own tasks, you can create tasks that you assign to others. You do this by sending a task request to someone. The person who receives the task request becomes the temporary owner of the task. They can decline the task, accept the task, or assign the task to someone else. If they decline the task, it's returned to you. (You still have to reclaim ownership by returning the task to your task list.) If they accept the task, they become the permanent owner. If they assign the task to someone else, the new assignee becomes the owner.

The owner is the only one who can make changes to the task. When an owner updates a task, Microsoft Outlook updates all copies of that task—the copy for the person who originally sent the task request and copies for any prior owners of that task. When the owner completes the task, Outlook automatically sends a status report to the person who originally assigned the task, any other prior owners, and anyone else who requested a report.

Create a Task

1. On the **File** menu, point to **New**, and then click **Task**.
2. In the **Subject** box, type a task name.
3. Complete any other boxes on the **Task** and **Details** tabs for information you want to record for the task.
4. To make the task recur, click **Recurrence**, click the frequency (Daily, Weekly, Monthly, Yearly) at which you want the task to recur, and then do one of the following:

Make the task recur at regular intervals

1. Select options for that frequency. Do not click **Regenerate new task**, or the task will not recur at regular intervals.

Make the task recur based on completion date

1. Click **Regenerate new task**, and then type a time frequency in the box.
2. If you want, set start and end dates for the task.
3. Click **OK**, and then click **Save** and **Close**.

Turn a message into a task

1. In the **Navigation Pane**, drag the message you want to convert onto the **Tasks** button.
2. On the **Task** or **Details** tab, select the options you want.
3. Note: You can change any type of item into another type of item by dragging it to the folder button in the Navigation Pane.

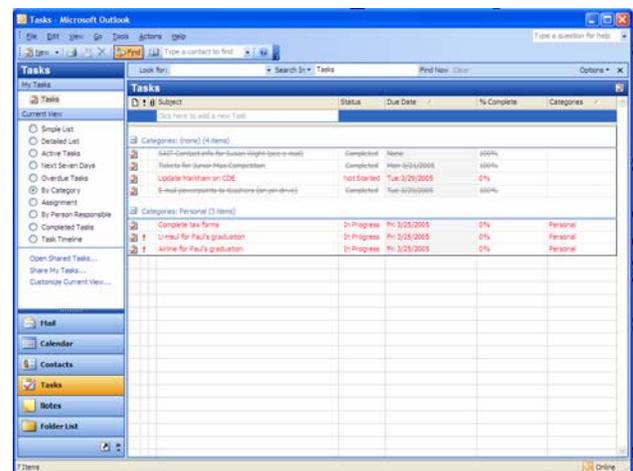
Assign a Task

1. To create a new task, on the **File** menu, point to **New**, and then click **Task Request**. To assign an existing task, in the task list, open the task you want to assign, and click **Assign Task**.
2. In the **To** box, enter the name of the person you want to assign the task to. To select the name from a list, click the **To** button.
3. For a new task, in the **Subject** box, type a task name. (In an existing task, the **Subject** box is already filled in.)
4. Select the due date and status options you want.
5. Select or clear the *Keep an updated copy of this task on my task list* check box and the *Send me a status report when this task is complete* check box.
6. If you want the task to repeat, click the **Actions** menu, click **Recurrence**, select the options you want, and then click **OK**.
7. In the body of the task, type instructions or information about the task.
8. Click **Send**.

Accept/Decline an Assigned Task

1. Open the task or task request.
2. Click **Accept** or **Decline**.
3. Click either **Edit** the response before sending (type your comment in the message, and then click **Send**), or **Send** the response now.

Organize your tasks by date, category, assignment or timeline.



Microsoft Outlook: Notes & Journal

Working With Notes

Notes are the electronic equivalent of paper sticky notes, i.e. Post-its. Use notes to jot down questions, ideas, reminders, and anything you would write on note paper. You can leave notes open on the screen while you work. This is especially convenient when you're using notes for storing bits of information you may need later, such as directions or text you want to reuse in other items or documents.

Create a Note

1. On the **File** menu, point to **New**, and then click **Note**.
2. Type the text of the note.
3. To close the note, click the note icon in the upper-left corner of the Note window, and then click **Close**.
4. Note: You can leave the note open while you work. When you change the note, the changes are saved automatically.

Create an Appointment, Task, or E-mail From A Note

You can drag *any* item into a folder of items of another type or on top of another type folder button in the **Navigation Pane** to quickly create a new item of a different type. For example, to create an appointment from a note, drag the note to the Calendar button in the Navigation Pane. Relevant information from the note is added to fields in the new appointment, and the entire message appears in the appointment body. Or, you can drag only selected text from an item to create a new item.

Share Your Notes With Others

In Notes, in the Navigation Pane, click Share My Notes.

Send that note fast!

Click the note icon in the upper-left corner of the open note and then click Forward.

Quickly create a note from text in another program

Select the text and drag it onto the Notes button in the Navigation Pane.

Make your notes more eye-catching

Change the color of an Outlook note by right-clicking the note icon in the Notes pane, pointing to Color, and then clicking a new color.

Assign a note to a category

Click the note icon in the upper-left corner of the open note, and then click Categories.

Working With Journal

Use Journal to **record the dates and times of your interactions with contacts**, such as tracking hours spent on a particular account. If you want to create a list of all the items related to a contact, use activity tracking, instead, to link the items to that contact.

Journal automatically records actions that you choose relating to the contacts that you choose and places the actions in a timeline view. In addition to tracking Microsoft Outlook items such as e-mail, or other Microsoft Office documents, such as Microsoft Word or Microsoft Excel files, you can keep a record of any interaction you want to remember— even something that is not located on your computer, such as a phone conversation or a handwritten letter you mailed or received.

You can open a Journal entry and review details about the activity, or you can use the Journal entry as a **shortcut** to go directly to the Outlook item or the file that the Journal entry refers to. You can distinguish a journal entry from other items by the clock that appears in the lower-left corner of the icon

Automatically record items and files

1. On the **Tools** menu, click **Options**.
2. Click **Journal Options**.
3. In the *Automatically record these items* box, select the check boxes for the items you want automatically recorded in Journal.
4. In the *For these contacts* box, select the check boxes for the contacts you want the items automatically recorded for.
5. In the *Also record files from* box, select the check boxes next to the programs whose files you want to automatically record in Journal.

Manually record a Microsoft Outlook item

1. On the **File** menu, point to **New**, and then click **Journal Entry**.
2. In the **Subject** box, type a description.
3. In the **Entry type** box, click the type of Journal entry you are recording.
4. Select other options you want.

Manually record a file from outside of Outlook

1. Locate the file you want to record. You can use Microsoft Outlook, Windows Explorer, or the desktop.
2. Drag the item to Journal.
3. Select the options you want for the Journal entry.

Quickly record any item in Journal

Drag the item to Journal view in the Navigation Pane.

Quickly go to another date in Journal

Click the date heading at the top of the timeline, and then click the month and day that you want to view.

Microsoft Outlook: **Shortcut Keys**

Toolbar Shortcuts

To do this	Press
When a toolbar is selected, select the next or previous button or menu on the toolbar	TAB or SHIFT+TAB
Open the selected menu, or perform the action for the selected button or command	ENTER
Select the first or last command on the menu or submenu	HOME or END
Close an open menu. When a submenu is open, close only the submenu.	ESC
Display the Start menu	CTRL+ESC
Enter a name in the Find a Contact box	F11

Note You can use the keyboard to select any menu command on the menu bar. Press ALT to select the menu bar. Press the letter that is underlined in the menu name that contains the command you want. In the menu that appears, press the letter underlined in the command name that you want.

Move and resize toolbars

Press ALT to select the menu bar. Press CTRL+TAB repeatedly to select the toolbar you want. In the toolbar, press CTRL+SPACE to display the Toolbar Options menu.

Do one of the following:

Resize a toolbar

Select the **Size** command, and then press **ENTER**. Use the arrow keys to resize the toolbar. Press CTRL+ the arrow keys to resize one pixel at a time.

Move a toolbar

Select the **Move** command, and then press **ENTER**. Use the arrow keys to position the toolbar. Press CTRL+ the arrow keys to move one pixel at a time.

To undock the toolbar, press DOWN ARROW repeatedly. To dock the toolbar vertically on the left or right side, press LEFT ARROW or RIGHT ARROW respectively when the toolbar is all the way to the left or right side.

Basic Shortcuts

To do this	Press
Go to the previous folder 	ALT+1
Up One Level button: open the folder up one level above the open folder 	ALT+2
Search the Web : close the dialog box and open your Web search page . 	ALT+3
Delete button: delete the selected folder or file 	ALT+4
Create New Folder button: create a new folder 	ALT+5
Views button: switch among available folder views 	ALT+6
Tools button: show the Tools menu	ALT+7 or ALT+L

Shortcuts to **Copy the Screen Image**

To do this	Press
Copy a picture of the screen to the Clipboard	PRINT SCREEN
Copy a picture of the selected window to the Clipboard	ALT+PRINT SCREEN

Shortcuts using the **Tab** Key

To do this	Press
Move to the next option or option group	TAB
Move to the previous option or option group	SHIFT+TAB
Switch to the next tab in a dialog box	CTRL+TAB
Switch to the previous tab in a dialog box	CTRL+SHIFT+TAB

Microsoft Outlook: **Shortcut Keys**

Shortcuts for **Outlook**

To do this	Press
Switch to Mail	CTRL+1
Switch to Calendar	CTRL+2
Switch to Contacts	CTRL+3
Switch to Tasks	CTRL+4
Switch to Notes	CTRL+5
Switch to Folder List in Navigation Pane .	CTRL+6
Switch to Shortcuts	CTRL+7
Next item (with item open)	CTRL+COMMA
Previous item (with item open)	CTRL+PERIOD
Switch between the Folder List and the main Outlook window	F6 or CTRL+SHIFT+TAB
Move among the Outlook window, the Navigation Pane , and the Reading Pane	TAB
Move around within the Navigation Pane	Arrow keys
Go to a different folder	CTRL+Y
Collapse/expand a group in the e-mail message list	Left and right arrow keys

Commonly used **Shortcuts**

To do this	Press
Save	CTRL+S
Save and Close, Send	ALT+S
Save As	F12
Undo	CTRL+Z or ALT+BACKSPACE
Delete	CTRL+D
Print	CTRL+P
Copy item	CTRL+SHIFT+Y
Check spelling	F7
Flag for follow-up	CTRL+SHIFT+G
Forward	CTRL+F
Send/post/invite all	ALT+S
Find items	F3 or CTRL+E
Find next during text search	SHIFT+F4
Use Advanced Find	CTRL+SHIFT+F
Create a new Search Folder	CTRL+SHIFT+P