Outlook 2007

BEYOND THE MANUAL

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Tony Campbell | Jonathan Hassell

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Outlook 2007

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Tony Campbell, Jonathan Hassell

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Outlook 2007: Beyond the Manual

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This book is dedicated to my wife, Sharon. Love you, babe.
—Tony

To my wife, Lisa. Thanks for everything. Oh, and thanks to the cats and dog for keeping things interesting.
—Jon

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About the Authors

TONY CAMPBELL is an experienced Microsoft consultant specializing in the architecture and design of secure, Microsoft-centric business solutions. He also has vast experience in many other industry niches such as networking, collaboration, security, business logic, and disaster recovery and resilience. Tony has been involved with all sizes of businesses, from the very small to the very large, and has successfully delivered secure, reliable, robust solutions to more than 150,000 clients in his 18 years in the business. Tony started his career back in the 80s as a "green-screen" mainframe programmer for the British Meteorological Office, finally arriving after a long journey in his current role as a self-employed IT consultant and author.

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Tony Campbell

Introduction

As Microsoft Office users and dedicated enthusiasts since the early days of Office 95, both Jon and I have been astonished by the amount of functionality that resides within Outlook—functionality that is largely ignored by the majority of users.

Don't get me wrong: this lack of understanding is through no fault of you guys; instead, it's due to Outlook being so much richer in capabilities than the simple messaging client it's purported to be by many business users. When someone says "email," people think of Outlook, but when someone says "workflow, calendaring, task management, to-do lists, RSS feed reading, and blog authoring," Outlook is less often at the top of their thoughts. More often than not, when Outlook is deployed in business, it's rarely sold as anything but a corporate email client.

Rarely do companies fully embrace Outlook for what it really is, and more important, it's extremely rare for users to receive any kind of guidance or training on the underlying power that this important productivity tool contains. So, that's why we wrote this book: to empower Outlook users with the knowledge they need to totally overhaul how they conduct their day-to-day business.

Outlook 2007 is the most comprehensive messaging and organizational tool on the market, and with this latest release, Outlook incorporates a whole bunch of new and exciting updates that will take you into the next major Internet revolution, such as the RSS feed reader/authoring capability for reading and publishing directly to blogs and a much simplified approach to organization, collaboration, and interoperability with server-side solutions such as SharePoint.

We have written *Outlook 2007: Beyond the Manual* as a one-stop-shop learning tool to explain exactly how the experts use Outlook 2007; it will take you further and faster into the depths of lesser used and lesser understood functionality and will allow you to start digitally managing your own time and work more effectively.

Who This Book Is For

Outlook 2007: Beyond the Manual is a guide for anyone who wants to get more from the software installed on their desktop. If you are currently an Outlook user and want to learn more about this sophisticated product's extended set of capabilities, this book is definitely for you. Alternatively, if you are not currently using Outlook (at home or in the office) and are in a position where you might be wondering whether to purchase it, or if you are wondering how to convince the IT department that Outlook makes good business sense, this book is certainly going to help you with the justification. Administrators, business analysts, power users, CEOs, and home users will all reap huge and immediate rewards from a better understanding of what Outlook 2007 can do.

Using this book, you will immediately see the benefits of what Outlook 2007 can bring to both your home life and your work life, and these benefits, with just a little practice, will offer not only personal and organizational benefits but will also increase productivity and lead to considerable savings in both money and time.

The only preconception this book makes of you is that you are familiar with the basics of email and electronic diaries; the rest, you'll learn in due course.

How This Book Is Structured

Outlook 2007: Beyond the Manual is divided into thirteen functionally specific chapters, with each covering a unique aspect of the technology that needs exposing. To give you a feel for what's to come, here is a chapter-by-chapter summary of the book you are about to read.

Chapter 1, "What's New and What's Improved in Outlook 2007"

Chapter 1 takes a look at the new features available in Outlook 2007 as well as taking a short walk through the basics of setting up and using email. We also cover the basic system requirements for installing Outlook 2007; then, at the end of this chapter, you'll find a comprehensive list of keyboard shortcuts that will help speed up your navigation around the interface.

Chapter 2, "Messaging"

Being able to send and receive email is without question the core function of Outlook, so this chapter covers some of the ancillary capabilities Outlook provides for enhancing this messaging capability. It covers using message templates to make sending messages more versatile, setting expiration dates to allow you to expire email content at a given time, using the Out Of Office Assistant, and integrating Outlook with Windows Live Messenger.

Chapter 3, "Message Organization"

Following on from the previous chapter, this chapter focuses on organizing email using features such as search folders to create query-based folders that are virtual representations of email in your inbox. We also cover rule and junk mail filtering as an introduction to using send and receive groups to split how individual accounts collect and process email.

Chapter 4, "Contacts and Address Books"

The goal of this chapter is to explain how you can best use Outlook's inherent ability to act as your personal address book. It looks at creating and using contact items and then elaborates on how contacts are stored in address books. The way you organize your contacts and address books in Outlook has much bearing on the net benefit you get out from the product.

Chapter 5, "Calendaring"

The calendar capability has been around for many, many versions of Outlook, but in Outlook 2007 it has been upgraded significantly, making it much more useful than before. This is largely due to the integration of color categories and its much improved interface; however, the new searching and sharing features make this so much more than simply somewhere to jot down future events—at last it's a fully featured personal information management tool.

Chapter 6, "Notes and Journals"

This chapter delves into some of the extra features Outlook provides. Specifically, you can use the notes capability to quickly jot down information (when you're on the phone, for example) and then further process that information into a more manageable format, such as an email, a task, or an appointment. The Journal is one of the least used yet most useful features in Outlook; it gives you an extremely versatile auditing capability, where you can have Outlook log the time you spend on tasks and record emails you send to specified recipients. There is also a manual method for entering Journal entries that cannot be recorded automatically, whereby you can also assign time in the audit log to phone calls, meetings, and ad hoc discussions.

Chapter 7, "Task Management"

Chapter 7 is devoted to managing tasks. In previous versions of Outlook, task management was poor, but Microsoft has really excelled in uplifting the experience in Outlook 2007, introducing the all-new To-Do Bar as a way of instantly seeing what you have to do and when. This chapter also covers how SharePoint task lists can be integrated into Outlook, bridging the gap that once existed between client and server technologies.

Chapter 8, "Storage Management"

This chapter covers managing Outlook storage, focusing on the underlying data files that are used to contain Outlook items associated with each of your accounts. You'll learn about online and offline storage and how you can use these differing methods to work remotely from your ISP or email server.

Chapter 9, "Color Categories"

This chapter dives into color categories (Outlook 2007's evolution of the previous version's unwieldy attempt at categorizing items) by introducing you to this much improved method for visually assessing email messages, tasks, and appointments that are related to each other. Color categories are one of the most important developments in Outlook 2007 that help you organize and process information more effectively and form the foundation for much of the text covered later in the book.

Chapter 10, "Customization"

The strength of Outlook comes from its ability to be adapted to suit your needs as those needs change. Chapter 10 looks at how you can customize standard Outlook functionality using profiles, command-line switches, views, and the Outlook Today web interface to shape it into a bespoke tool that services your every whim.

Chapter 11, "Security and Backup"

These days, no IT book would be complete without covering security. Because Outlook 2007 is so immensely feature rich and capable of managing your every need, it stands to reason that the underlying application is extensive. So, what has Microsoft done to ensure all this private and personal data is protected? This chapter covers all you need to know about securing Outlook; it specifically covers certificates, macro security, add-ins, and privacy, which are all managed through the all-new management console called the Trust Center.

Chapter 12, "Outlook Outside the Office (or Home)"

More and more of us are becoming mobile or home-based workers these days. This chapter looks at the best ways of configuring Outlook when you have no real fixed abode or you are on the move. Outlook 2007 provides several features and services for mobile workers that allow you to access email over any kind of connectivity, be it dial-up, LAN, or Internet.

Chapter 13, "Forms and Macros"

Building on what you learned in Chapter 10, Chapter 13 goes further into customizing Outlook using forms and macros. This chapter looks at the basic principles of both technologies and then takes you through a working example of creating and publishing a basic form with an embedded Excel spreadsheet control. A short introduction to macros is also included to whet your appetite.

Prerequisites

If you will be installing Outlook 2007 on Windows XP, ensure you have previously upgraded to Service Pack 2 and downloaded and installed the Windows Desktop Search version 3.0 or later in order to get the most out of your new software.

Contacting the Authors

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Jon is also a pretty busy guy, with speaking, travel, editing, and writing, but he'd love to hear from you when you get a chance. Email him at:

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