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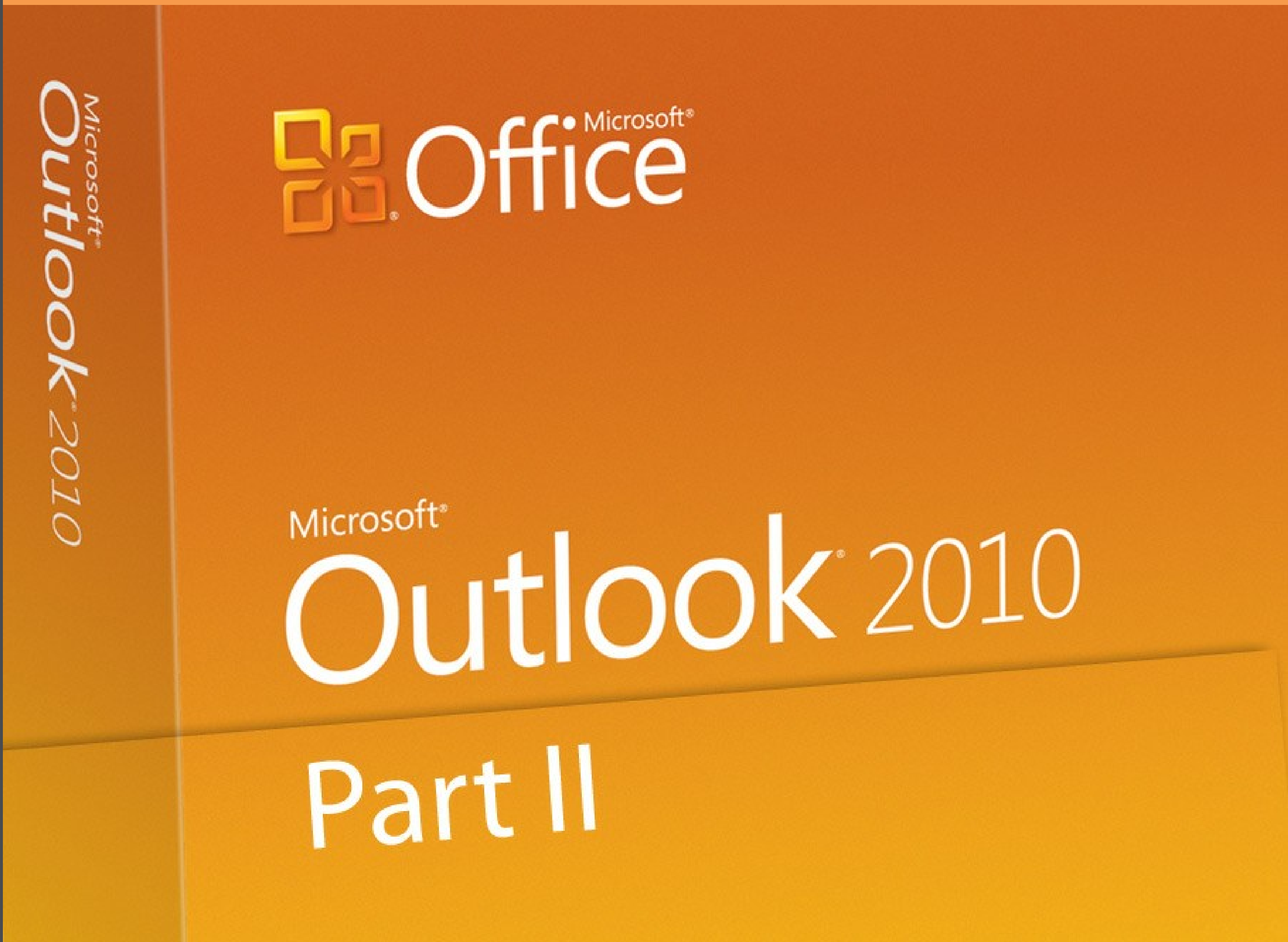
Outlook 2010: Part II

Mail, Contacts and Address book

Stephen Moffat, The Mouse Training Company



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Outlook 2010

Part II

Outlook 2010: Part II

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Contents


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Outlook 2010: Part I

Section 6 Organising Your Mail

All graphics related to Microsoft in this book is in compliance with Microsoft guidelines and thus permitted by Microsoft.

Objectives:

BY THE END OF THIS SECTION YOU WILL BE ABLE TO:

- Delete Messages
- Sort Items
- Find Items
- Filter Messages
- Clean Up Mailbox
- Use Out Of Office
- Recall A Message
- Print Messages

Controlling Mail Messages

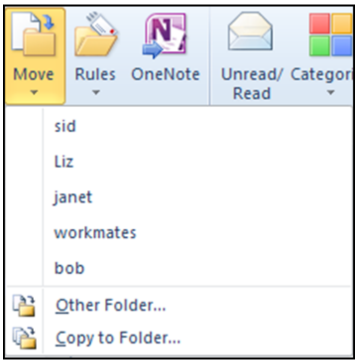
As you use Outlook and your e-mail account(s), you will need to delete, store messages in different related folders, sort and find messages.

Once the folders are set-up, you are able to store your related messages in folders when you receive them.or as we will discover later AS we receive them..

Moving Messages

➢ **<u>Move An Item To Another Folder:</u>**

<u>TOOLBAR</u>



1. Select the item(s) you want to move.
- *To select adjacent items, click the first item, and then hold down* ***[SHIFT]*** *and click the last item.*
- *To select nonadjacent items, click the first item, and then hold down* ***[CTRL]*** *and click additional items.*
- *To select all items, Press* ***[CTRL][A]*** *on the keyboard.*

2. On the **HOME** Tab in the **MOVE** group click **MOVE**, and then click the name of the folder. Or if the folder is not listed click on the **OTHER FOLDER** option to open a dialog with all folders.
3. Select the folder you want to move the item to and click **OK**.

<u>OR</u>

1. Select the item(s) you want to move.
2. Click and drag the item(s) over the folder you want to move the item(s) to and release the mouse.

Copying Messages

➢ **To Copy An Item:**

MENU

1. Select one or more items.
2. On the Edit menu, click Copy.
3. On the **HOME** Tab in the **MOVE** group click **MOVE**, click on the **COPY TO FOLDER** option to open a dialog with all folders.
4. Select the folder you want to copy the items to and click **OK**.

OR

1. Select the item(s) you want to copy.
2. Click and drag the item(s) while holding down the **[CTRL]** key on the keyboard over the folder you want to copy the item(s) to and release the mouse.

Marking Messages As Read And Unread

Unread messages are displayed with bold text headers giving the user a visual identification of which messages still need to be read. The user may decide from viewing the subject title, not to read the message or group of messages. An unread message can be marked as read to remove the bold text from the message header. A message that has been read and contains important or reference materials can be marked as unread allowing the user to see the message location at a glance.

➢ **To Mark A Message As Read:**

MENU

1. Select the required message.
2. Choose **UNREAD/READ** from the **TAGS** group on the **HOME** tab

OR

1. Click the right mouse button on the selected message, choose **MARK AS READ**.
2. Bold formatting is removed from the message header if read.

➢ **To Mark A Message As Unread:**

MENU

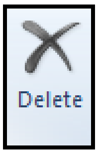
1. Select the required message.
2. Choose **UNREAD/READ** from the **TAGS** group on the **HOME** tab

OR

3. Click the right mouse button on the selected message, choose **MARK AS UNREAD**.
4. Bold formatting appears on the message header when unread

Deleting Messages

Once a message is no longer needed, the user can delete it. When a message is deleted, it is stored in the Deleted Items folder. Deleted messages can be retrieved from the Deleted Items folder.



➢ **To Delete A Message:**

MOUSE

1. Select the message or messages to delete.
2. On the **HOME** ribbon in the **DELETE** group click on the **DELETE** button.

OR

1. Click and drag the selected message to the Deleted Items folder.

OR

1. Click the right mouse button on the selected message, choose **DELETE**. The deleted message is placed in the Deleted Items folder.

KEYBOARD

2. Select the message to delete and press **[DELETE]**. The deleted message is placed in the Deleted Items folder.

- **To Retrieve A Deleted Message:**

MOUSE

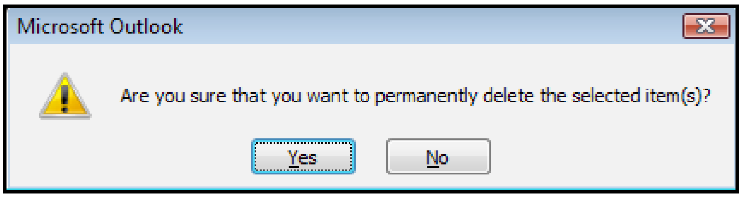
1. In the Deleted Items folder, click and drag the message to be retrieved into the required folder, e.g. lnbox.
2. Release the mouse. The chosen message is now restored to the folder specified.

Deleting Messages Permanently

If messages are no longer required, they **MUST** be deleted from the deleted Items folder. If this is not done regularly and error message will appear warning you that you have run out of space in your mail box.

- **To Delete A Message From The Deleted Folder:**

MOUSE



1. Click on the **DELETED ITEMS** folder.Select the items you want to delete
2. Press **[DELETE]** on the keyboard. Outlook displays the following dialog box:-
3. Click **YES** to delete the selected items.

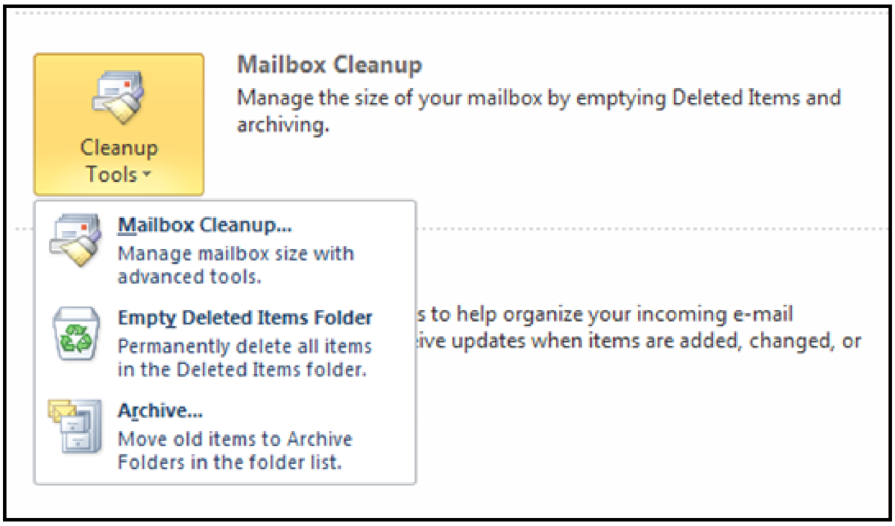
- **To Delete Everything From The Deleted Items Folder,**

MOUSE

1. Click the right mouse button over the folder icon and choose **EMPTY DELETED ITEMS** folder from the resulting shortcut menu.

OR

1. Click the **EMPTY FOLDER** button on the **FOLDER** tab in the **CLEAN UP** group.



OR

1. Go to **BACKSTAGE** view and click on the **MAILBOX CLEANUP** button
2. From the menu click on the **EMPTY DELETED ITEMS FOLDER** option
3. Click **YES** to confirm

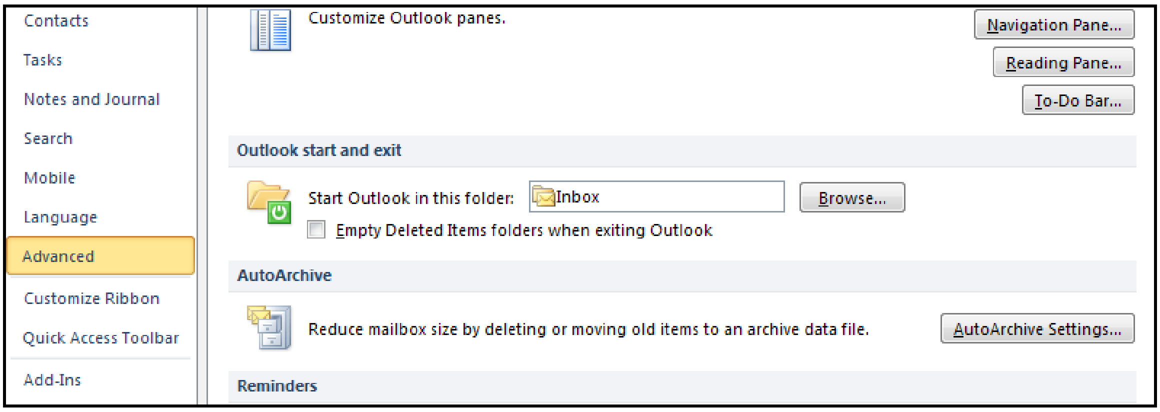
Automatically Empty The Deleted Items Folder.

You can get Outlook to empty the deleted Items folder upon exiting Outlook.

➢ **To Empty The Deleted Items Folder Upon Exiting**

MOUSE

4. In **BACKSTAGE** view, click **OPTIONS**, and then click the **ADVANCED** tab.
5. Go to the **OUTLOOK START AND EXIT** group of options
6. Select the **EMPTY THE DELETED ITEMS FOLDER WHEN EXITING OUTLOOK** check box.



- *To turn off automatic emptying of the Deleted Items folder, clear the Empty the Deleted Items folder upon exiting check box.*

Arraging Your Mail

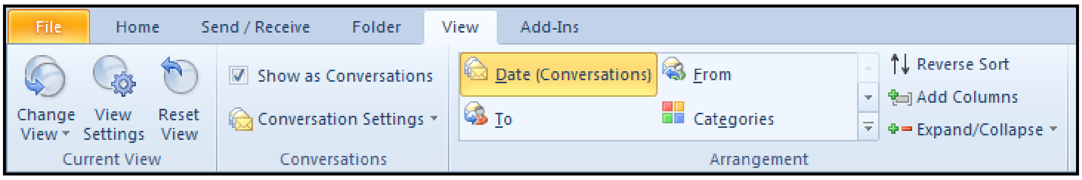
Sorting And Grouping Items

Sorting is a way of arranging items in ascending or descending order. You can sort items in any view, based on one field or multiple fields, with the exception of the time-based views such as Day/Week/Month and timeline.

E.G. You can sort a list of e-mail messages alphabetically by sender and then by subject. (The abbreviations RE and FW in the Subject box are ignored when you sort messages alphabetically by subject).

By default, the most recently received messages are placed at the top of the View Pane. Messages can be sorted by importance, icon, flag status, attachment, sender, or subject in Ascending or Descending order.

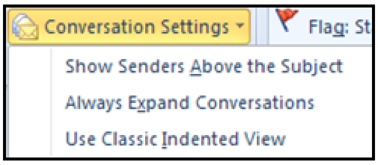
Views



All of the filtering sorting and grouping options just mentioned all make up part of what is called a view. (The appearance of items within any folder.) to make life easier all of these options will be found within the view ribbon and the sorting and filtering options selected can be saved as a named view in case you wish to quickly switch between one view and another. The view ribbon allows you to reset your view in case of mistakes. Since a view is only the way items APPEAR then there is no risk of deleting or losing items within a folder. If something does go missing it is only because it has been hidden by the view settings.

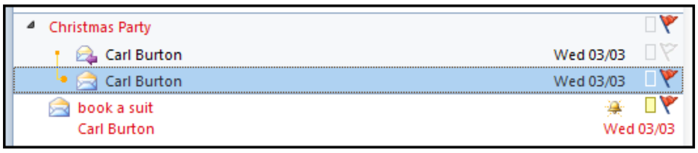
Shown here is part of the **VIEW** ribbon showing the groups, that will allow you to quickly sort and arrange your emails. Please remember that at any time if your view becomes confusing or that you cannot remember what settings you have applied click on the **RESET VIEW** button in the **CURRENT VIEW** group to restore the default view

Conversations



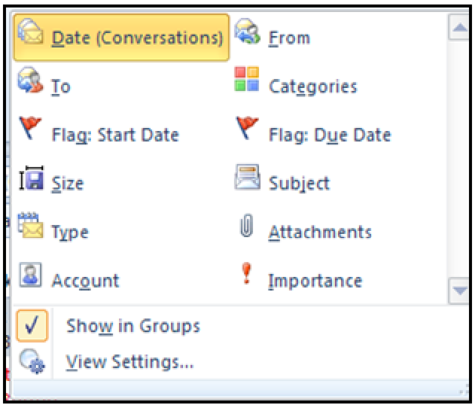
Although you may move your emails into different folders as you read and respond to them within your mail folders. A new feature of 2010 is conversations and it allows you to keep a track of any ongoing conversations (Replies and replies to replies etc) irrespective of where you place them a track is kept of where they were moved to to turn this feature off untick the **SHOW AS CONVERSATIONS** box in the **CONVERSATIONS** group.

You may also wish to change some of the settings for conversations which allow you to indent the conversations making them easier to read, to show the senders name above the subject line within the conversation or finally to automatically expand any conversations. This last one shows a small triangular arrow to the top left of an email and as you click on it to expand or collapse the conversation. You are able to see the history of the emails sent and received for that subject.



➤ **<u>To Group A Folder Of Messages.</u>**

<u>MOUSE</u>



1. Select a folder whose items you would like to sort.
2. On the **VIEW**tab, in the **ARRANGEMENT** group click on the drop down arrow to the right of the **GROUP BY**part of the group to see a quick selection of how your emails may be grouped and sorted.
3. By default this is by date
4. Make a selection say group by **FROM.**
5. Now your emails will be grouped by who sent them.

➢ **To Further Sort A Folder Of Messages**

MOUSE

1. Select a folder whose items you would like to sort further.
2. Click on the label at the top of a column and a menu should appear as on the right.
3. Make a selection of how you wish your folder sorted and grouped.
4. The folder is now sorted and grouped.

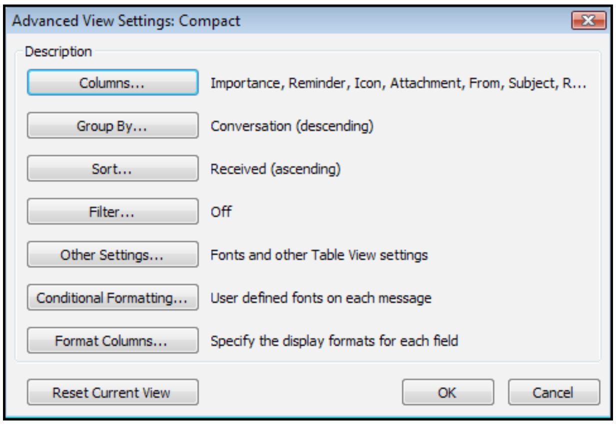
Changing Sort Order By View

Upto now you have sorted and grouped with just a few clicks into basic sorting and grouping choices defined by microsoft but you may wish to have the ability to further refine your sorting and grouping options by more than those offered in the default menus. To do this we have to change the view itself and have all the sort and grouping options available.

➢ <u>To Change The Sort Options In The View</u>

<u>MOUSE</u>

1. Select a folder whose items you would like to sort further.
2. Click on the **VIEW SETTINGS** button in the **CURRENT VIEW** group a dialog will appear.

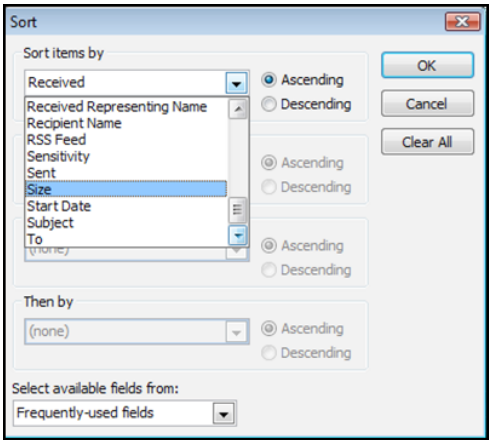


3. By default the sort is by received and ascending.
4. Click on the sort button.

5. Another dialog will appear

- *As you can see you are able to sort your emails by upto four levels.*

6. Click on the drop down arrow to the right of the first sort by box. And make a selection.



7. You may choose to sort by other levels if you would like.
8. If you make a mistake at any point or change your mind. Click on the **CLEAR ALL** button to reset the sort orders and start again.
9. Click **ASCENDING** or **DESCENDING** for the sort order.
10. When your selections are made click on **OK** to accept your choices and close the dialog.
11. Click ok to close the view settings and apply the sort

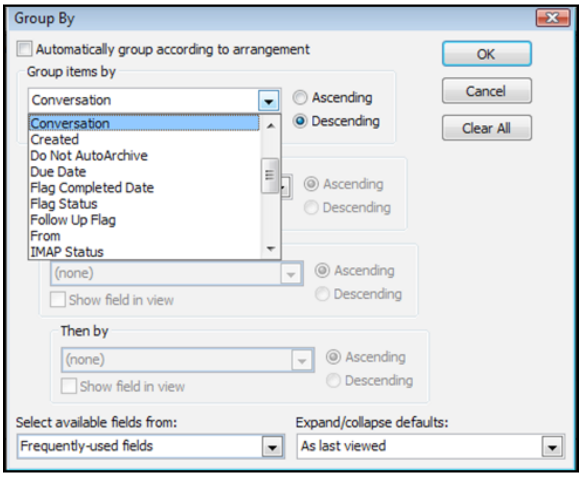
Changing Grouping By View

As discussed earlier to have more choice than the default grouping options we must change the view. The operation is similar to sorting

➢ **To Change The Group Options In The View**

MOUSE

1. Click on the **VIEW SETTINGS** button in the **CURRENT VIEW** group a dialog will appear.
2. Click on the **GROUP BY** button. Another dialog will appear.



3. As you can see you may group by upto four groups. By default the checkbox for **AUTOMATICALLY GROUP ACCORDING TO ARRANGEMENT** will be ticked and the four drop down boxes greyed out.
4. Untick the box to allow manual grouping to become available. You may wish your emails to be grouped by sender rather conversation or by size to allow you to quickly free up some space in your mailbox.

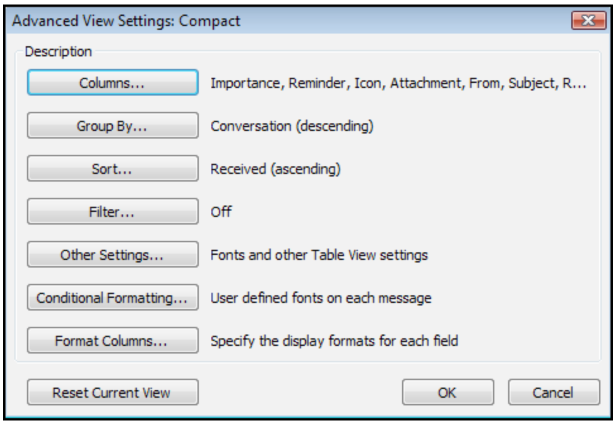
   If the field you sort by is the same as the field items are grouped by, Microsoft Outlook sorts the group headings instead of the items within each group. To sort the individual items in a group, click a field in the Sort items by box that is different from the Group by field you have chosen.

5. Make a selection and click **OK**
6. Click **OK** once again to close and apply the changed view settings.
7. A triangle will appear on the column header indicating the sort order, e.g. a downward facing triangle indicates a descending sort order.

Changing the View

Column Headings

Column headings can be added, moved, removed or new column headings created in the View Pane. The width of the column heading can also be sized to meet the user's requirements.



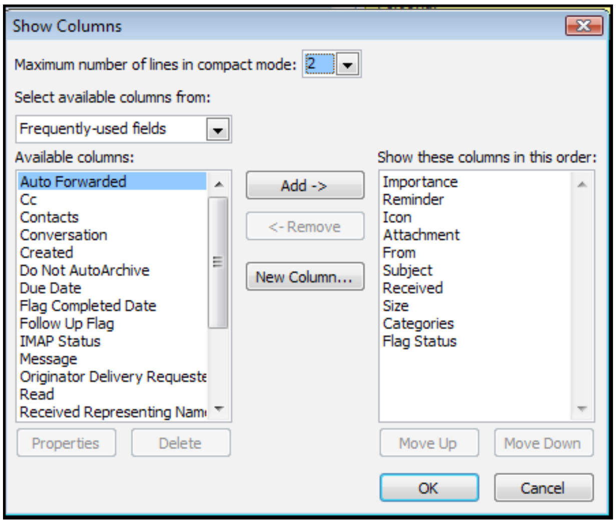
➢ <u>**To Add An Existing Column Heading:**</u>

<u>**MENU**</u>

1. Click on the **VIEW SETTINGS** button in the **CURRENT VIEW** group a dialog will appear.
2. Click on the **COLUMNS** button.
3. In the **AVAILABLE COLUMNS** box, select the required field.
4. Choose **ADD** and click **OK**.
5. Click ok again to save and apply the changed view settings.

➢ **To Create A New Column Heading:**

MENU



1. Repeat Step 1 and 2 above.
2. Choose NEW **COLUMN**. Type the required field name.
3. Choose the field type and format required. Choose **OK**.
4. The name of the new field displays in the **SHOW THESE FIELDS IN THIS ORDER BOX**.
5. Click**OK**.

➢ **To Move A Column Heading:**

MOUSE

1. Click on the **VIEW SETTINGS** button in the **CURRENT VIEW** group a dialog will appear.
2. Click on the **COLUMNS** button.
3. In the **SHOW THESE FIELDS IN THIS ORDER BOX**, select the field to move.
4. Choose **MOVE UP** to move the selected field up the listingOrChoose **MOVE DOWN** to move the selected field down the listing.
5. Choose **OK**.

➢ **To Remove A Column Heading:**

MENU

1. Click on the **VIEW SETTINGS** button in the **CURRENT VIEW** group a dialog will appear.
2. Click on the **COLUMNS** button.

3. In the **SHOW THESE FIELDS IN THIS ORDER BOX**, select the field to be removed.
4. Choose **REMOVE**.
5. Click **OK**. The selected column heading is removed.

➢ **To Size A Column Heading:**

MOUSE

1. Position the mouse pointer on the right edge of the required column headings.
2. The mouse pointer changes to a double-headed arrow.
3. Click and drag the column heading to the left to reduce the column or.
4. Click and drag the column heading to the right to enlarge the column.

Finding Items

As your Inbox and other mail folders grow in size with received messages there will come a time when you want to find a particular item but you do not know which message folder it was in. Outlook provides a Find feature for such occasions.

➢ **To Find A Message:**

MOUSE

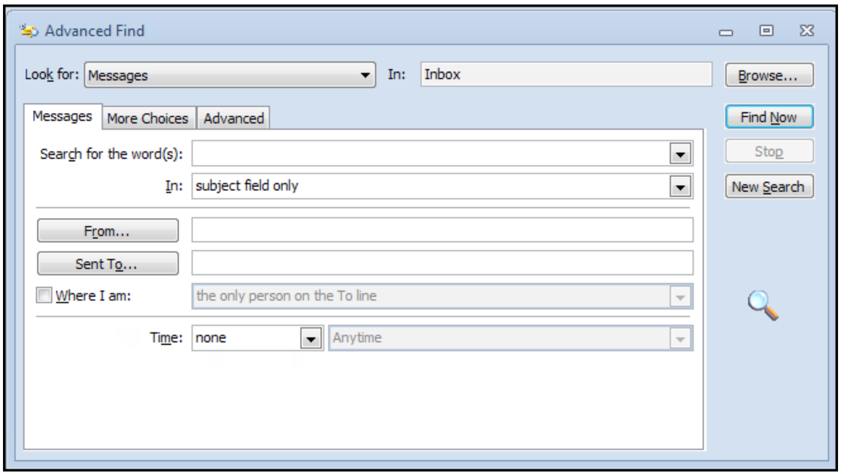
1. The simplest method to find an email within a given folder is to use the search box which appears at the top of the viewpane above your messages.
2. Just click in the box and type the topic or person you wish to find an email from.
3. Click on the magnifying glass button to the right to search.
4. The emails within THAT folder will filter down to the one or two that contain the text you entered.
5. Click on the cross on the right of the search box to clear the criteria and return your default view.

Advanced Find

If you have many folders and cannot locate your email with the basic search facility then you will have to use another method 'advanced find' which will allow you to search your whole mailbox and to apply advanced search criteria.

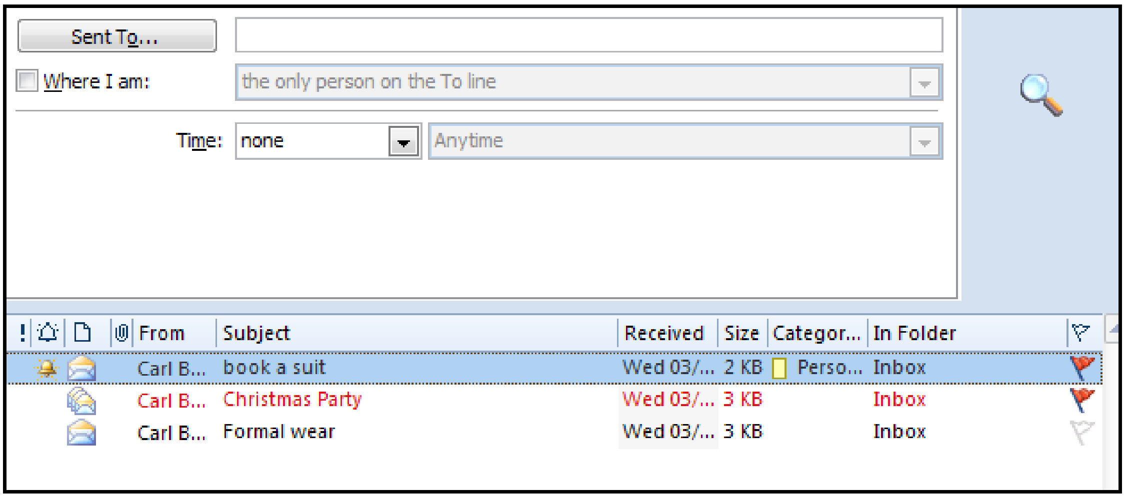
➢ **Advanced Find**

MOUSE



1. While in the mail Folders click on the magnifying glass to the right of the search email box.
2. A new search ribbon will appear.
3. Click on the **SEARCH TOOLS** button and from the menu choose **ADVANCED FIND** or use the shortcut key **CTRL+SHIFT+F.**

4. The **ADVANCED FIND** dialog will open.
5. In the **LOOK FOR** box, choose the type of item you want to search for.
6. If the folder you want to search does not appear in the **IN** box, or you want to search more than one folder, click **BROWSE** to select from a list.It would be wise to select the mailbox to search ALL folders.
7. Type the text you want to search for in the search for the word(s) box.
8. Choose which fields of the message you wish to search in the second **IN:** box by default it is set to search the subject line only.
9. Select the remaining search options you may wish to use.
10. Click **FIND NOW**, the search takes place and the results are displayed below the search options.



11. Please take note in the following picture that all the results displayed also indicate which folder the email or item is contained in.
12. To clear the search just close the dialog box

Search Folders

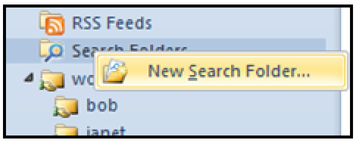
Search folders have been available for a while and they are an excellent way of saving your searches for popular items whether they have been moved around or not.

You may wish to see at a click all your emails over a certain size, maybe all flagged emails, maybe from a certain category like personal or business.

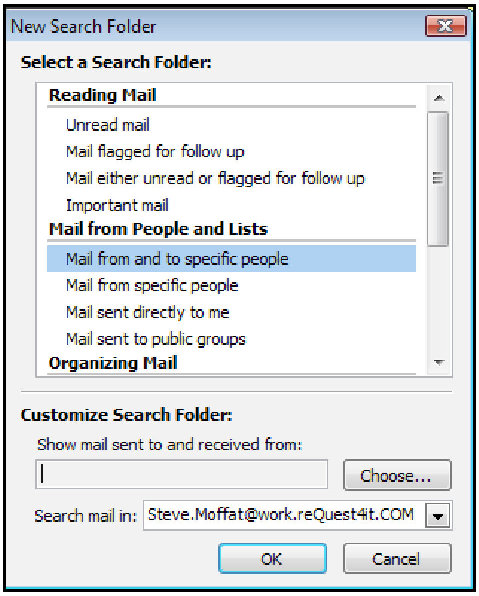
Search folders do not contain any emails themselves they are really a saved search that is run every time you click on that search Folder and because the search encompasses the whole mailbox there is no need to ever again 'lose' an email or take periods of time locating one that you have misfiled.

➢ **To Set Up A Search Folder**

MOUSE



1. Click on the search folder in the navigation pane an option to create a new search folder will appear.



2. from the dialog that appears make a choice as to what you want the search folder to find many of the popular options for finding emails are in here.

3. If you have more than one account then make sure you select which account you wish to search as only one account can be searched by a search folder.
4. If for example choose mail to and from specific people other options will become available.
5. Choose the person or persons and click **OK**
6. The search folder is created.
7. Clicking on the search folder shows the emails based on your criteria

Filtering Items

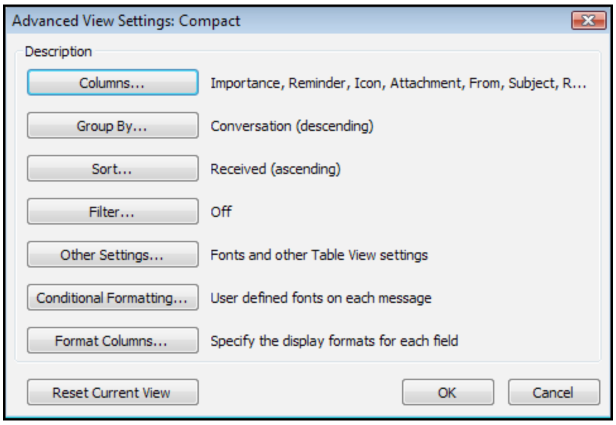
A filter is an easy way to view only those items or files that meet conditions you specify. A little like a search folder but only acting on a specific folder rather than the whole mailbox.

For example, you can filter all items with "Jane Brown" in the From box to see only items from Jane Brown. All of the other items are still in the folder and can be seen again by removing the filter.

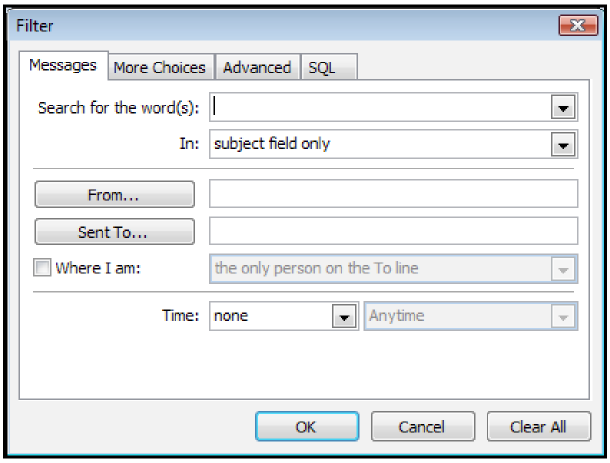
When a filter is applied to a selected folder, the status bar displays the words "Filter Applied" in the lower-left corner of the screen.

➢ To Show Or Hide Items Or Files With A Filter:

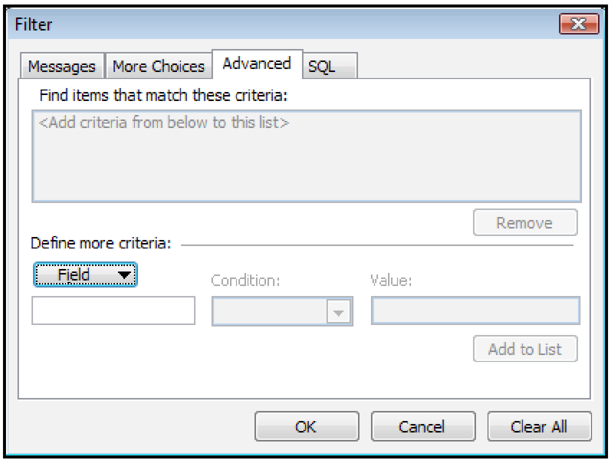
MOUSE



1. Click the folder you want to apply a filter to.
2. Click on the **VIEW SETTINGS** button in the **CURRENT VIEW** group a dialog will appear.
3. Click the **FILTER** button
4. Select the filter options you want.

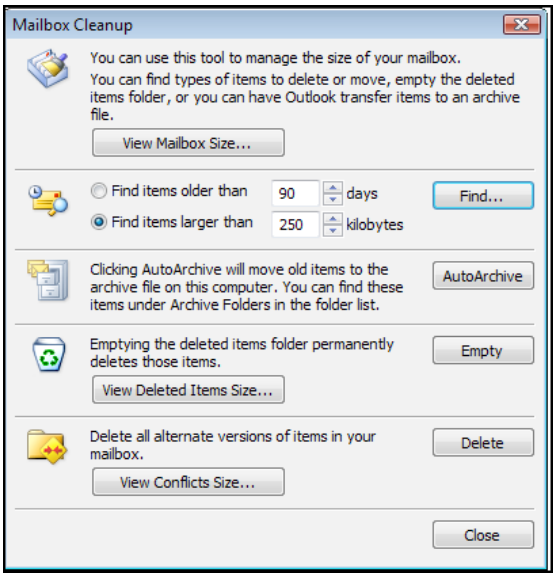


5. To filter using additional criteria such as a category or importance level, click the **MORE CHOICES** tab, and then select the options you want.
6. If you select more than one option, only the items that meet all of the criteria appear. However, if you use the same field to set multiple criteria, items that meet one criterion within that field are found.
7. You can customise your criteria by using the **ADVANCED** tab.
8. Click **FIELD**.
9. Point to the field set you want, and then click the field you want to use in the search criteria.



10. In the **CONDITION** box, click the condition you want to use with the selected field. The conditions available depend on the field selected.
11. If the condition requires a value, enter the value you want the field and condition to meet in the **VALUE** box.
12. Click **OK**.

Mailbox Cleanup



With Mailbox Clean-up feature, you can manage the size of your mailbox to improve the overall performance of Microsoft Outlook.

➢ **To Use Mailbox Cleanup:**

MENU

1. In **BACKSTAGE** view, click **MAILBOX CLEAN-UP**.
2. Click the **VIEW MAILBOX SIZE** button to view the total size of your mailbox and of individual folders within it.
3. Find items that are larger than a certain **KB** size or older than a certain date.
4. Archive items using **AUTOARCHIVE**.(this will be dealt with separately)
5. View the size and Empty your **DELETED ITEMS** folder.

6) **VIEW CONFLICTS SIZE** button allows you to clean up the conflicted records when your local offline folders are synchronised with your online mailbox. Any conflicting records are stored in a conflicts folder. This can be cleaned up

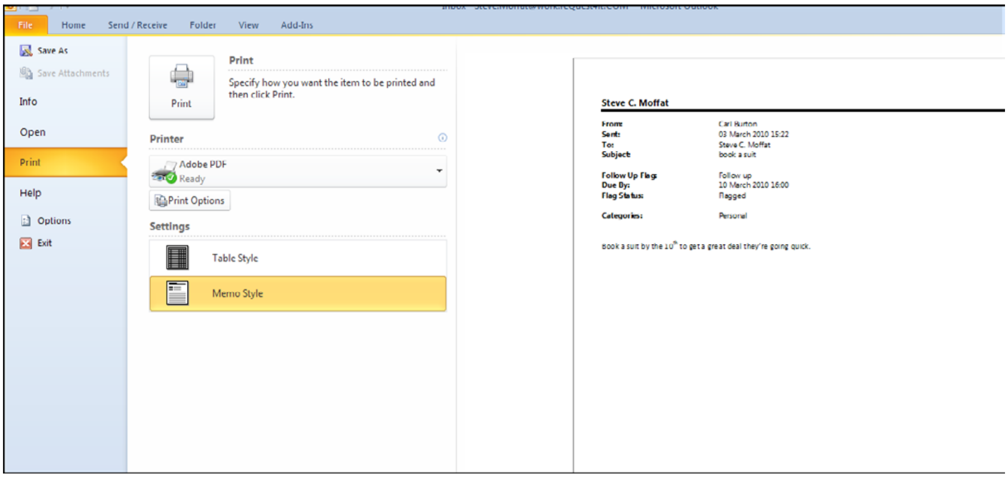
Printing Messages

A range of messages can be printed by clicking on the first message required, pressing **[SHIFT]** and clicking on the last message required. Several individual messages can also be selected by pressing **[CTRL]** whilst clicking on the messages required.

➢ **To Print A Message:**

MOUSE

1. Open the required message or select the message you wish to print in the View Pane.



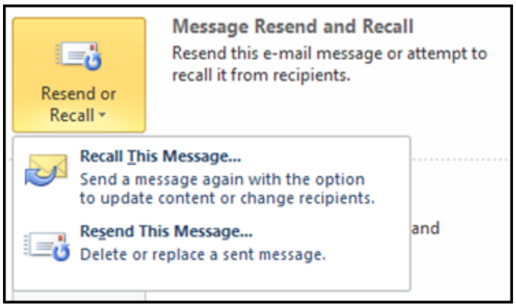
2. Choose **FILE**, **PRINT** a preview of the message will appear on the right.
3. Click on the **PRINT** button to print the email.

Recalling Sent Messages

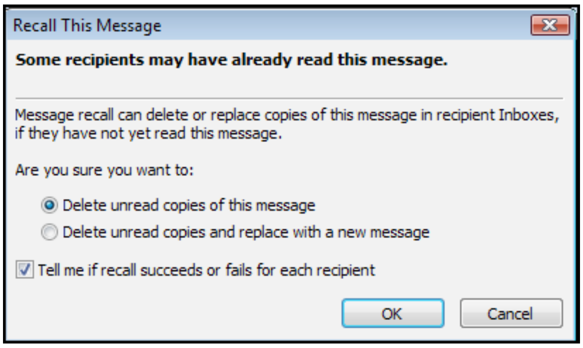
The user may want to recall a message that is inaccurate or inappropriate. A message can only be recalled if it has not been read by the recipients or has not been moved out of the recipients' Inbox.

➢ **<u>To Recall A Message:</u>**

<u>MENU</u>



1. In the Sent Items folder, open the message to recall.
2. Choose **FILE** (backstage view), **RESEND OR RECALL** this Message.
3. From the menu select **RECALL THIS MESSAGE**
4. The Recall This Message dialog box displays.



5. To remove the sent message from the lnbox of all the recipients who have not opened the message, choose **DELETE UNREAD COPIES OF THIS MESSAGE**.
6. Click**OK**

<u>OR</u>

1. To remove the sent message from the Inboxes of all the recipients, and then open a new message that the user can send to replace the original, choose **DELETE UNREAD COPIES AND REPLACE WITH A NEW MESSAGE**.
2. Click**OK**, type and send the new message.

To replace a message, a new message must be sent. If a new message is not sent, the original message is still recalled.

Section 7 Address Books & Contacts

<u>Objectives:</u>

BY THE END OF THIS SECTION YOU WILL BE ABLE TO:

- Identify Different Address Books
- Create A Personal Address Book
- Create A Distribution List
- Create Contacts
- E-Mail A Contact
- Find And Edit A Contact
- Flag A Contact
- Add A Vcard To Out Going Messages

Address Book Window

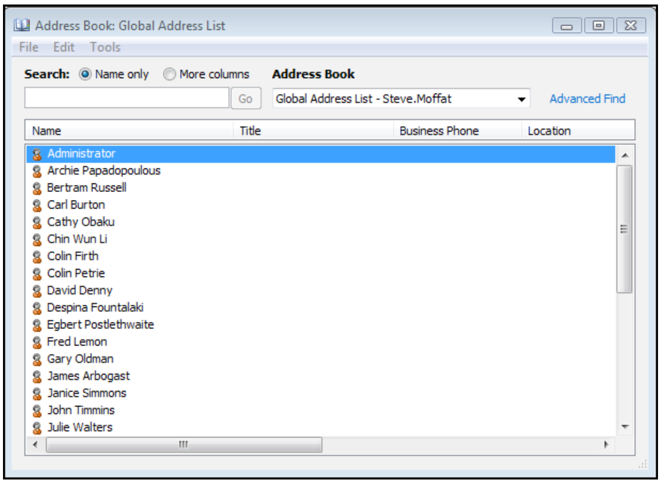
The Address Book is a collection of address books provided by Microsoft Outlook, Microsoft Exchange Server, or Internet directory services, depending on how you have set up Outlook. You can use the Address Book to look up and select names, e-mail addresses, and distribution lists when you address messages. When you type a name in the To, Cc, or Bcc box of an e-mail message, Outlook automatically checks to see if the name you typed matches a name in the Address Book. If there is a match, the name is resolved and you can send the message. If there is no match, Outlook prompts you for more information by way of the Check Names dialog box.

Global Address Book

The Global Address List is a feature of Microsoft Exchange Server that contains all user and distribution list e-mail addresses in your organisation. The administrator creates and maintains this address book. It can also contain public folder e-mail addresses.

➢ **To Display The Global Address Book:**

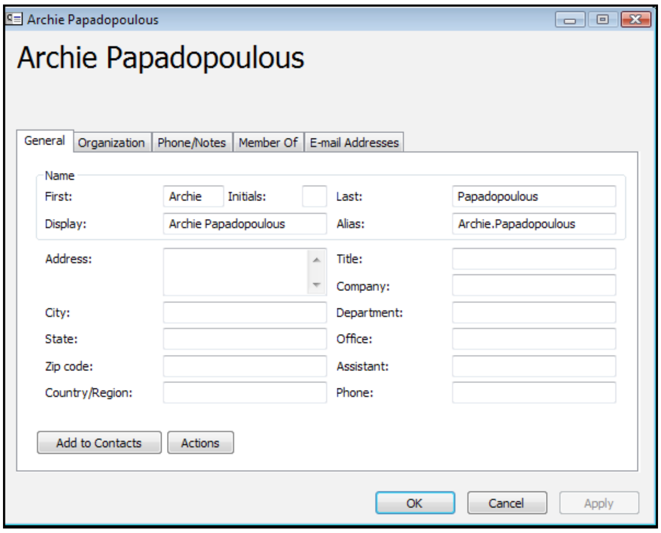
MENU



1. On the **HOME** tab,**FIND** group Click the **ADDRESS BOOK** icon
2. Click the drop-down arrow in the **ADDRESS BOOK** section and select **GLOBAL ADDRESS LIST**.
3. All The addresses here are the mailboxes on your exchange server and cannot be altered by yourself unless you have the appropriate permissions from the administrator.
4. Right-click the name, and then click **PROPERTIES** to display the details about the selected name.

➢ **To Find A Name In The Global Address Book:**

MENU



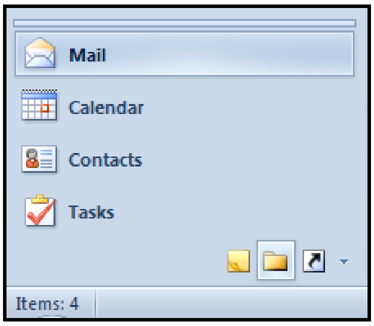
1. Display the Global Address List as shown above.
2. Enter the name that you would like to find in the search section.
3. Click on **GO/**

Contacts (Personal Address Book)

A Personal Address book is a private mailing list and in 2010 we will refer to is as a contact address book.Contact Address Books can be created or edited by the user and are stored in the mail users profile. Names can be added to the contact Address book via the Global Address List or from other electronic address books. contact Address books are used to create mailing lists of the people the user frequently sends messages to. You may have many of these address books.

- **To View The Contact Address Book:**

MOUSE



1. On the **HOME** tab,**FIND** group Click the **ADDRESS BOOK** icon

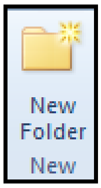
2. Click the drop-down arrow in the **ADDRESS BOOK** section and select **CONTACTS**.

OR

3. In the **NAVIGATION PANE** click on the **CONTACTS** icon.

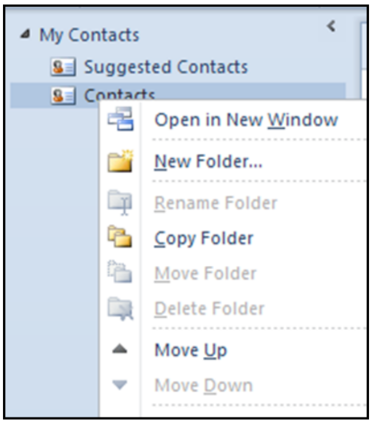
➢ **To Create A Contact Address Book**

MOUSE



1. In the **NAVIGATION PANE** click on thE **CONTACTS** icon.
2. Go to the **FOLDER** tab.
3. Click on **NEW FOLDER** in the **NEW** group.
4. Enter a name.
5. Choose a location and press **RETURN.**

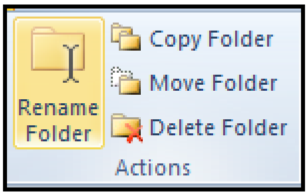
OR



1. In the **NAVIGATION PANE** click on the **CONTACTS** icon.
2. Right click the **CONTACTS** Folder in the **NAVIGATION PANE** at the top right.
3. Click **NEW FOLDER**.
4. Enter a name and choose a location.
5. Press **RETURN.**

➢ **To Remove An Address Book**

MENU



1. In the **NAVIGATION PANE** click on the **CONTACTS** icon.
2. Select the address book to delete
3. On the folder tabin the actions group click on delete folder

➢ To Add An Address To A Contact Address Book:

MENU

1. Display the Address Book window.
2. Select the name from the appropriate address book to add to your contacts.
3. Choose **FILE** from the address book menu and select**ADD TO CONTACTS**

OR

1. Click the right mouse button on the selected name, choose **ADD TO CONTACTS** from the shortcut menu.

Editing Contacts In Address Book Window

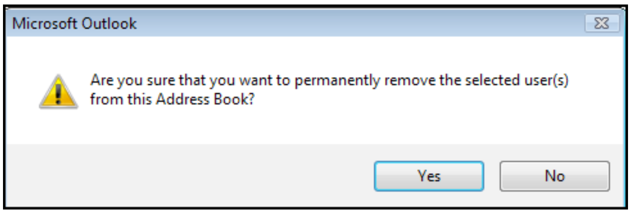
Names can be deleted from Your contact address books. You can also set your contact address Book to display when creating new mail messages.

➢ To Delete A Name From The Contact Address Book:

MENU

1. Display the **CONTACT ADDRESS BOOK** and select the name to delete.
2. Choose **FILE** from the address book menu then**DELETE**

OR

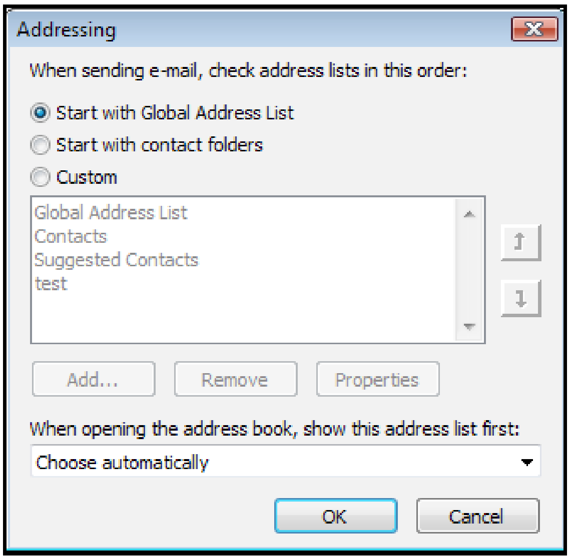


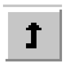
3. Click the right mouse button on the selected name, choose **DELETE** or press the **DELETE** key on the keyboard. A warning box displays.
4. Choose **YES** to confirm removal of the selected name.

➢ To Display The ContactAddress Book By Default:

MENU

1. In the Address Book window, choose **TOOLS**, **OPTIONS**. The **ADDRESSING** dialog box displays:-



Options	Description
Show this address list first	Displays the address list in the active profile.
When sending mail, check address lists in this order	Displays the order in which address lists are checked when sending messages.
	Moves the address list up one line in the list.
	Moves the selected address list down one line in the list.
Add	Adds the selected Address list to the list.
Remove	Removes the selected Address list from the list.
Properties	Displays details for the selected address list.

2. Click the down arrow to the right of the **SHOW THIS ADDRESS LIST FIRST** box.
3. Select **CONTACTS** and choose **OK**.
4. To close the Address Book window, choose **FILE**, **CLOSE**.
5. Open the address book from the ribbon and you will see that the Address Book window opens listing contacts as the default address book.

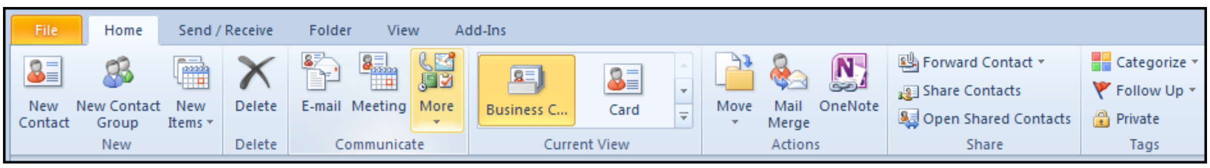
Contacts in Outlook

A contact is a person with whom the user communicates with on a business or personal level. Business and personal contacts can be stored in the Contacts folder. The Contact address book is made up of the entries in the contact folder.

Creating A Contact

The user can create contact information containing contact names, addresses and phone numbers. When a contact is created, the user can enter new information, or they can start with a copy of information on an existing contact from the same company and amend it as necessary. When a new contact is created, a Contact form will display with four tabs: General, Details, journal and All Fields. The General tab is the default tab and contains fields for general information relating to a contact, e.g. name and address. The other tabs contain fields for more specific information about a contact. Each piece of contact information is stored in a field, however, information does not have to be entered in every field or every tab.

In 2010 as you click into your contact folders the ribbon will change to give you the tools you need to work with contacts effectively.



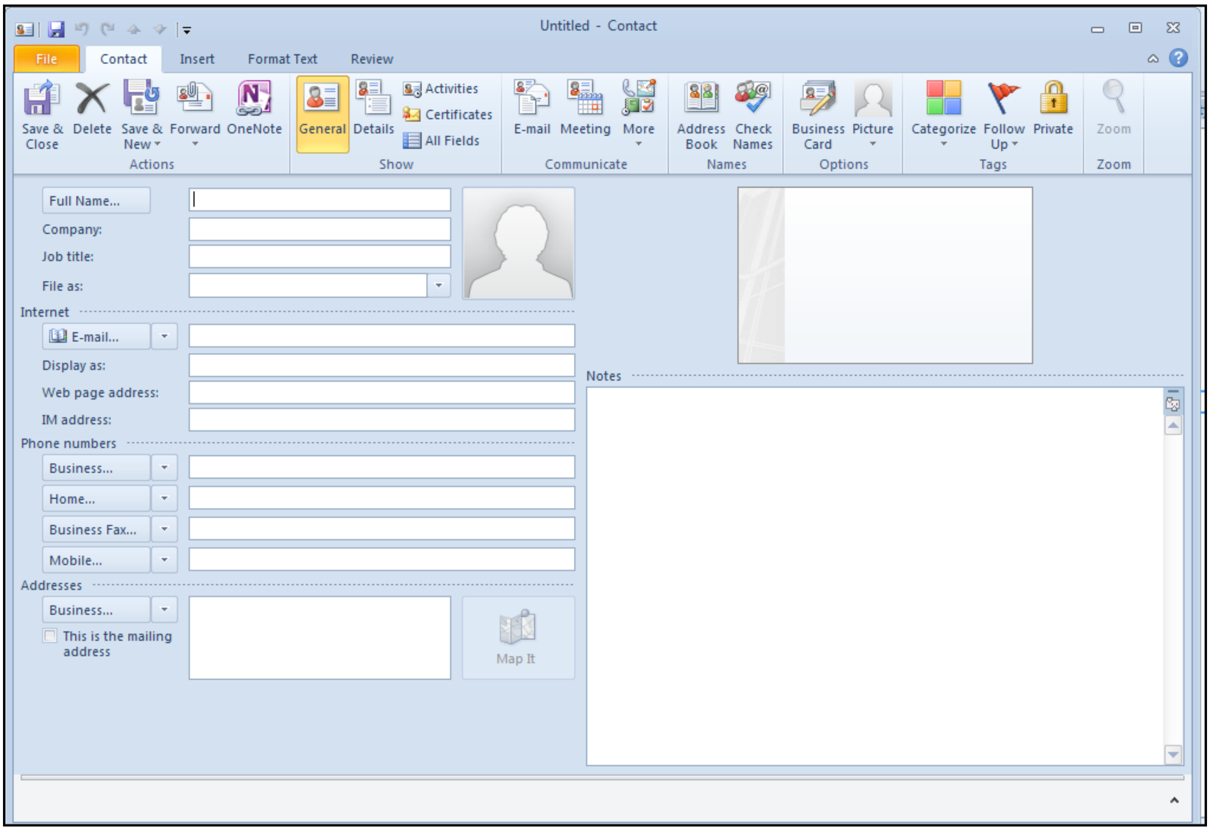
- **To Create A New Contact's Name And Address:**

MENU

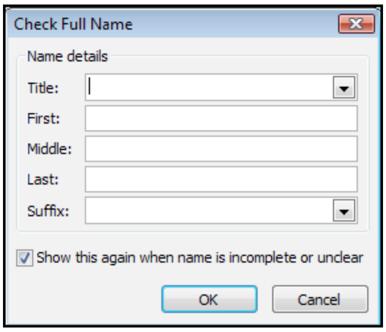
1. Ensure you are in the contact folder you wish to be in
2. Choose **NEW CONTACT** from the **NEW** group on the **HOME** ribbon.

OR

3. Choose **NEW ITEM** from the **NEW** group on the **HOME** ribbon.
4. Choose **CONTACT**. A contact window opens.



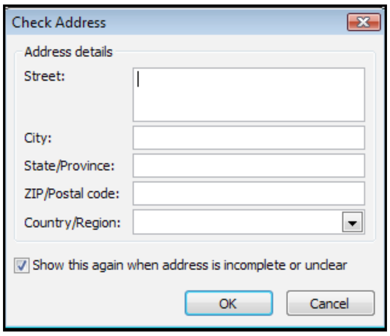
5. In the **FULL NAME** box, type the contact's name. A full name is the first and last name for the contact, or the first and last name plus a middle name, title and suffix, e.g. Jr.



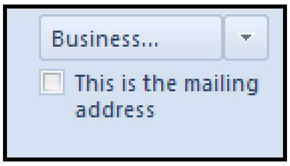
6. To make sure the parts of a name are identified correctly, Click on**FULL NAME...** The Check Full Name dialog box displays.
7. If required, change the full name information and choose **OK**

<u>OR</u>

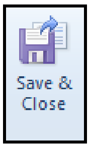
8. If details are correct, choose **OK**.
9. In the **JOB TITLE** box, type the contact's job title, e.g. Managing Director.
10. In the **COMPANY** box, type the contact's company name.
11. Click the arrow to the right of Business and choose the address type, e.g. Business, Home or Other.



12. In the **ADDRESS** box, type the address required pressing **[ENTER]** after each line of the address.
13. To make sure the parts of an address are identified correctly, choose the address type required, e.g. Business, and click the Address button. The Check Address dialog box displays.
14. If required, change the address details and choose **OK**
15. To enter additional addresses for the contact, repeat steps **XI** and **XII** choosing a different address type in step **XI**.
16. Up to three addresses can be created for the contact. When an address type is selected, e.g. Home, the address assigned to that type will automatically display.



17. To set one of the addresses to be the contact's mailing address, display the address type required, e.g. Business, and check the **THIS IS THE MAILING ADDRESS** checkbox
18. This address becomes the primary address that shows in most views and is used in Word 2010 mailmerges. If only one address has been entered, that address is used as the mailing address.
19. In the **FILE AS** box, select the name or company name to display the contact under.
20. Company names that start with articles, e.g. "A" or "The", are automatically displayed under the next word in the name, e.g. "The Bar" is displayed as "Bar, The".



21. In the **NOTES** box, type any supplementary information required, e.g. specialises in car maintenance.
22. Click **SAVE AND CLOSE** when complete

- **<u>To Add An E-Mail Address To A Contact:</u>**

<u>MOUSE</u>

1. Create or open a contact.
2. Click the **E-MAIL** button and select the address required from the list of e-mail addresses and choose **OK**.

<u>OR</u>

3. In the **E-MAIL** box, type the e-mail address required.
- *An Internet e-mail address consists of a user name and a domain name, with the two separated by an @ sign, e.g. if semlo1 is the user and msn.com is the domain name the address would be semlo1@msn.com.*
4. To add additional e-mail addresses, click the arrow to the right of E-Mail and choose E-mail 2 or E-mail 3 and repeat previous steps
5. Click **SAVE AND CLOSE.**

- **<u>To Create A Contact From An E-Mail Message You Receive:</u>**

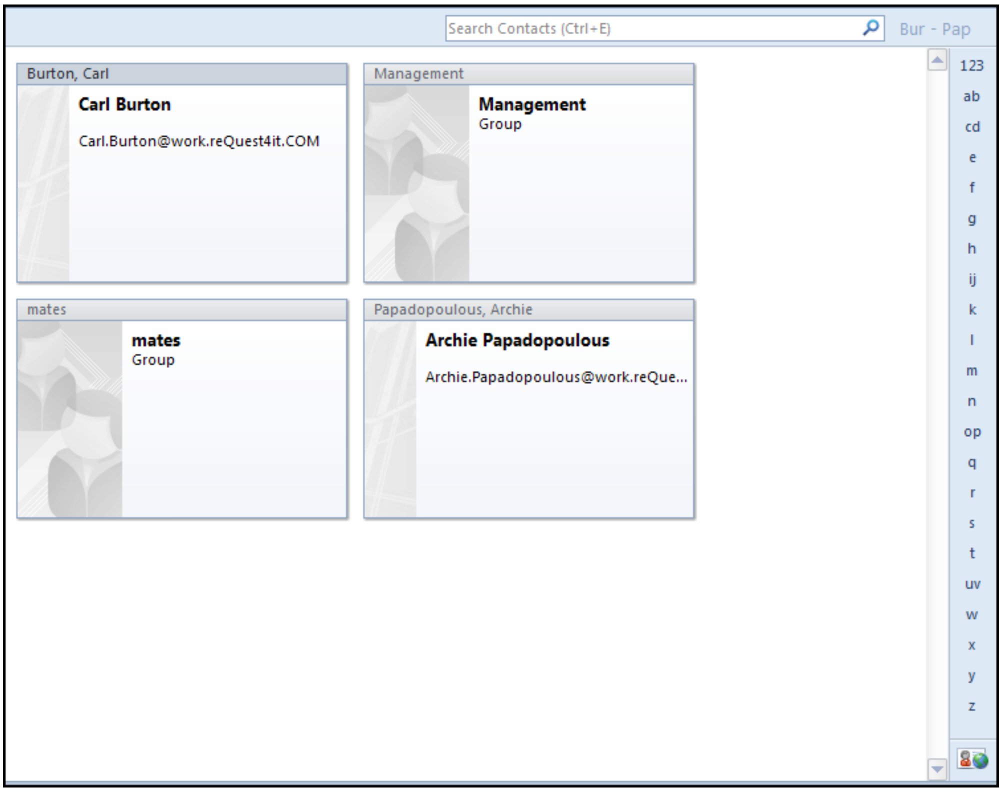
<u>MOUSE</u>

1. Open the e-mail message that contains the name you want to add to your contact list.
2. In the **FROM** field, right-click the name you want to make into a contact, and then click **ADD TO CONTACTS** on the shortcut menu.
3. A contact window will open enter pertinent information and **SAVE AND CLOSE**

- **<u>To Select A Contact:</u>**

<u>MOUSE</u>

1. Click the Letter on the far right of the contacts window that the name begins with to go to contacts beginning with that letter
2. The name or company name the contact is filed under highlights indicating the selection.



3. Click anywhere on the contact to select.

➢ **To Edit Contacts:**

MENU

1. Select the contact to edit.
2. Double click the contactto open.
3. Edit the data as required, e.g. change the contact's name.
4. Click **SAVE AND CLOSE**

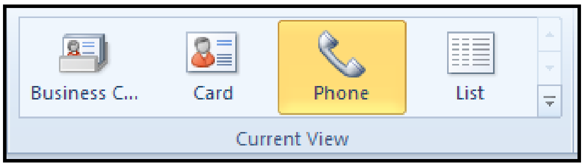
View Settings For Contacts

Outlook 2010 allows the Contacts display to be altered, using one of the following views:

Cards	Displays contacts on individual cards with one mailing address, including their business and home phone numbers. This is a compact view Of a business card and shows less information but is editable directly on the contact without having to open it.
Business Cards	Displays contacts on individual cards with business and home addresses, phone numbers and additional details.
Phone	Displays contacts in a list with company name, business phone number, business fax number and home phone number.
List	By default grouped can be grouped by any of the lower choices.
By Category	Displays contacts in a list grouped by categories and sorted by the names the contacts are filed under within each category.
By Company	Displays contacts in a list grouped by company with job title, company name, department, business phone number and business fax number.
By location	Displays contacts in a list grouped by country with company name, state, country, business phone number and home phone number.
By Follow Up Flag	It is possible to flag a contact that you need to call by specifying a date and time for Outlook to send you a reminder, through Flag for Follow Up.

➢ **To Change View:**

MOUSE



1. In the **CONTACTS** folder, choose a View from the **CURRENT VIEW** group on the **HOME** ribbon.

OR

1. In the Contacts folder,Select the view required if a list view then go to the **VIEW** tab
2. In the **ARRANGEMENT** group choose a group to arrange by from the drop down list.

Information In A Contact

➢ **To Edit Fields Directly In A Card:**

MOUSE

1. Ensure you are on Card view. (Not business card)
2. Click the field in the card to edit. The insertion point displays.
3. Position the insertion point and type new text required

OR

4. Press **[DELETE]** to delete characters to the right of the insertion point or Press **[BACKSPACE]** to delete characters to the left of the insertion point. New text is inserted to the left of the insertion point and existing text is pushed to right.

Some fields cannot be edited directly in a card, e.g. the contact name in the card heading. To edit this information, the contact must be opened.

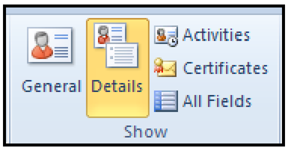
➢ To Add Phone Numbers For A Contact:

MOUSE

1. Create or open a contact.
2. In the **PHONE LOCATION** box, select an option that describes the phone number, e.g. Business.
3. In the **PHONE NUMBER** box, type the phone number required.
4. For international phone numbers and automatic phone dialling use +country code (area code) local number as the format.
- *Dialling notes can be included after the phone number, e.g. "ext. 2181" or "before 17:30").*
5. To add additional phone numbers, in a different Phone Location box and Phone Number box repeat steps 2 and 3.
6. Click**SAVE AND CLOSE.**

➢ To Add Personal Information Relating To A Contact:

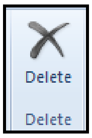
MOUSE



1. Create or open a contact.
2. In the **SHOW** group click on the **DETAILS** button
3. Add the details required, e.g. Birthday.
4. Click **SAVE AND CLOSE.**

➢ **To Delete A Contact:**

MOUSE



1. Select the contact to delete.
2. Choose Delete from the home ribbon

OR

3. Click the right mouse button on the contact to delete, choose **DELETE**.

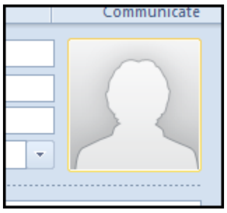
Other Contact Options

Adding A Photo

You have the ability to add a photo to your contact to enable easy recognition in business cards and other social uses within outlook.

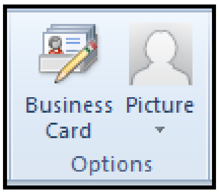
➢ **To Add A Photo**

MOUSE



1. Create a new contact or open an existing contact
2. Double Click on the photo area of the contact to browse for a photo.

OR



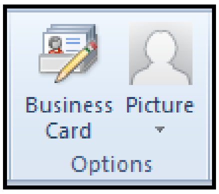
3. Click on the**PHOTO** button in the **OPTIONS** group on the **CONTACT** ribbon.
4. Browse and select photo when photo is selected click **OK** to insert photo within the contact.
5. Click **SAVE AND CLOSE**

Editing The Business Card

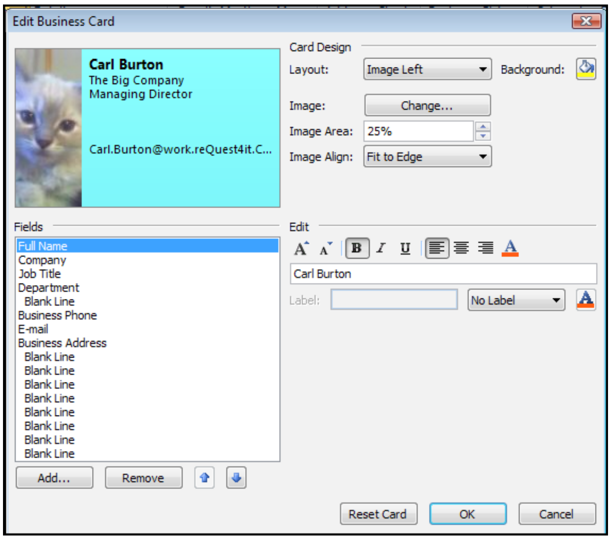
The default appearance of a business card can be edited to suit your own prefences changing the information shown, the colour even picture and placement of the picture.

➢ **To Edit A Business Card**

MOUSE



1. Create and enter information for a new contact or open an existing contact.
2. Click on the **BUSINESS CARD** button in the **OPTIONS** group on the **CONTACT** ribbon.
3. If you wish to change the image on a card click the image button select an image click **OK**



4. To reposition the image click on the drop down arrow to the right of **IMAGE ALIGN** to position the picture where you wish.
5. Choose how area you wish your picture to occupy by selecting a percentage from the **IMAGE AREA** button.
6. Choose a background colour for your busines card from the **BACKGROUND** button.
7. Add or remove information you wish displayed on your card using the buttons bottom left.
8. Use the **UP** and **DOWN** arrows to reorder the information on your business card.

9. Selecting a piece of information you can use the font formatting tools to change the text appearance on your card.
10. If you make a mistake or change your mind you can use the **RESET CARD** button to revert to the default layout.
11. When your changes are complete click on the **OK** button to accept changes to the appearance of your business card.

Activities

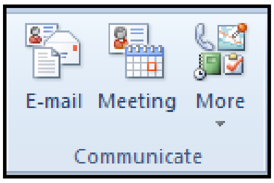
Outlook 2010 tracks everything a contact does such as emails, appointments, tasks etc. clicking on the Activities button allows a glimpse at what other items are within your mailbox related to this contact.

E-Mailing A Contact

From a contact in the Contact list, Outlook 2010 can address a mail to the chosen contact.

➢ **To Send A Mail Message To A Contact:**

MOUSE



1. In the Contacts folder, select the contact to mail.
2. Click the **E-MAIL** button in the **COMMUNICATE** group.
3. An email will open addressed to this contact.
4. Complete the e-mail and send it.

Updating A Contact From Server

If you added your contact from the global address list (from your organisations address book) which as I have said is stored on the server from time to time the company information is updated such as change of address, telephone number, department, manager, etc. You may well be unaware of these changes on the server. At various times it may be wise to use the update button on the ribbon to check the details you have against the server information. Clicking on the button will check and inform you of changes and update the information from the contact.Just open the contact and click the button.

Locating Contacts

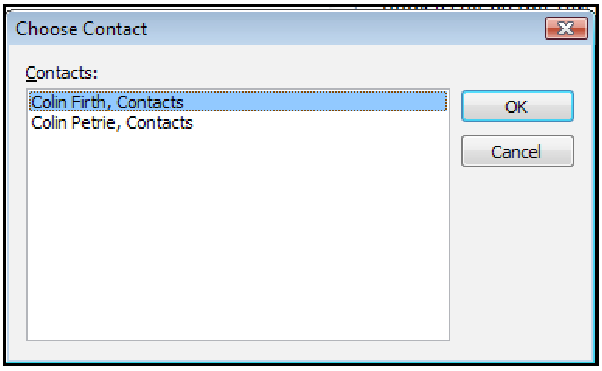
The search feature above the contacts as in the email section of this manual enables the user to search for specific text in all fields, regardless of how they are displayed.

When using the Advanced Find feature the user enters criteria for which to base the search on. The Advanced Find dialog box contains three tabs: Contacts, More Choices and Advanced. Again this is the same as in the email section of this manual.

➤ **To Find A Contact:**

MOUSE

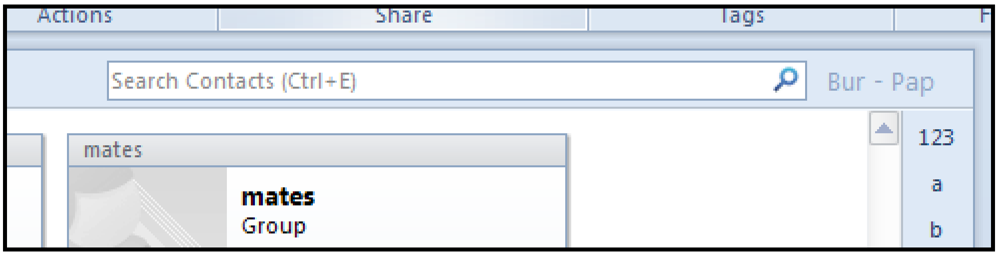
1. While in your mail folders you may wish to locate a contact
2. On the **HOME** ribbon in the **FIND** group type the name of the contact you want to find in the **FIND A CONTACT** box .



3. You can enter a partial name, such as Judy L, a first or last name, an e-mail alias, display as name, and company name and press **[ENTER]**. To quickly open a contact you previously searched for, click the **FIND A CONTACT** arrow and select a name.
4. If there are more than one occurrences of the search phrase entered, the following dialog box will be displayed, asking you to choose a contact from the list.

OR

1. If you are in your contact folders The following search bar is availablebelow the ribbon.



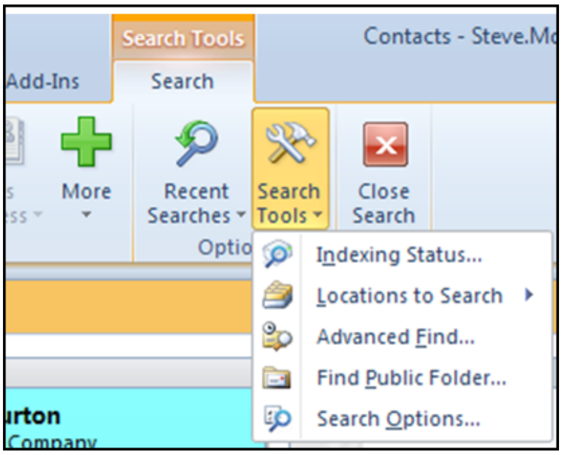
2. In the search contacts box, type a first or last name, an e-mail alias, display as name, and company name you want to search for then click on the magnifying glass to the right to search.
3. The search takes place and the results are displayed the whole of your contacts will be filtered to display those containing the text you searched for. So if you typed Bob and you have 6 Bob's in your folder all six will appear for you to investigate.

Advanced Find

If you have so many contacts and many address books that narrowing the results down doesn't really help then you will have to use the advanced search feature as you did to locate emails.

➤ **To Use Advanced Find:**

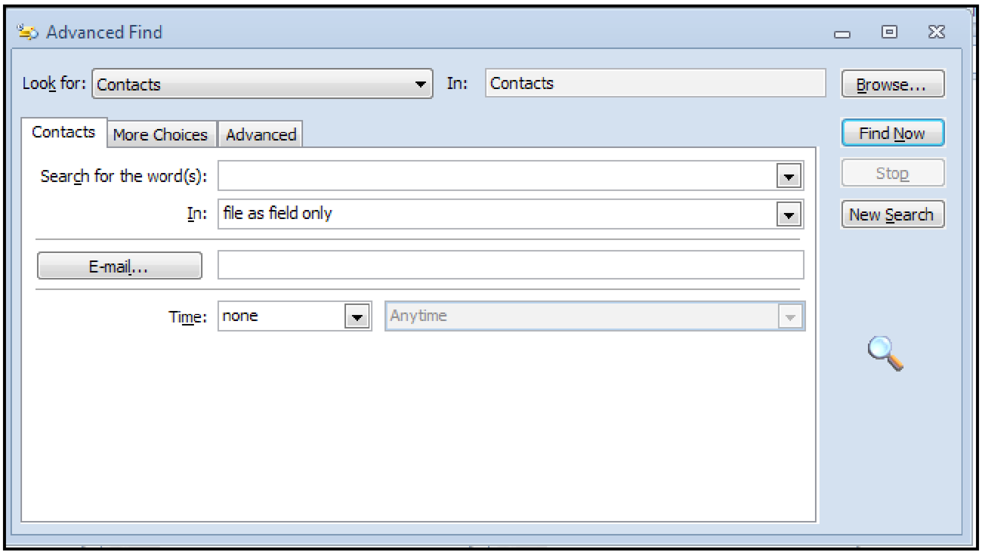
MENU



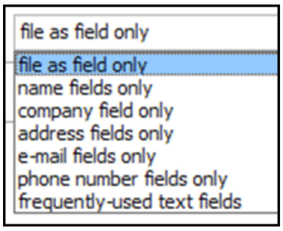
4. While in the contact folder you wish to locate a contact in.
5. Click on the magnifying glass to the right of the search contact box.
6. A new search ribbon will appear.
7. Click on the **SEARCH TOOLS** button and from the menu choose **ADVANCED FIND.**

OR

1. Use the shortcut key **CTRL+SHIFT+F.**
2. In the Search for word(s) box, type the text required, e.g. the name of the contact required.
3. In the **IN:** box, select the field(s) to search. Default is **FILE AS** field



4. For the broadest search, select **FREQUENTLY USED TEXT FIELDS**.



5. If required, in the **TIME** box, select the time the contact was created or modified.
6. Choose **FIND NOW**. The results of the search are displayed in a table at the bottom of the **ADVANCED FIND** dialog box.
7. To display contact details, double-click on the contact required in the table.
8. On completion, close the contact. The **ADVANCED FIND** dialog box redisplays.
9. To locate additional contacts, choose New Search and enter new search parameters OrTo end the search, close the **ADVANCED FIND**dialog box.

➢ **To Find Contacts By Category:**

MENU

1. While in the contact folder you wish to locate a contact in.
2. Click on the magnifying glass to the right of the search contact box.
3. A new search ribbon will appear.
4. Click on the **SEARCH TOOLS** button and from the menu choose **ADVANCED FIND.**

OR

5. Use the shortcut key **CTRL+SHIFT+F.**
6. Choose the **MORE CHOICES** tab.

Options	Description
Categories	Displays a list of the categories to search. To search more than one category, separate them with commas.
Only items that are	locates items based on whether they have been opened.
Only items with	locates items based on whether they have a file attached.
Whose importance is	locates items based on the importance or priority level specified.
Match case	locates items that have the exact combination of uppercase and lowercase characters the user specified in the 'Search for the words' box in the Contacts tab.
Size (kilobytes)	Used to set a size comparison value, e.g. to find items smaller than 1,000 kilobytes, choose 'less than', and then type 1,000 in the box to the right.

7. Choose the options required, e.g. Set category to Personal.
8. Choose **FIND NOW**. The results of the search are displayed in a table at the bottom of the **ADVANCED FIND** dialog box.
9. To display contact details, double-click on the contact required in the table.
10. On completion, close the contact
11. The **ADVANCED FIND**dialog box redisplays.
12. To locate additional contacts, choose **NEW SEARCH** and follow previous steps

➢ **To Perform An Advanced Search:**

MENU

1. While in the contact folder you wish to locate a contact in.
2. Click on the magnifying glass to the right of the search contact box.
3. A new search ribbon will appear.
4. Click on the **SEARCH TOOLS** button and from the menu choose **ADVANCED FIND.**

OR

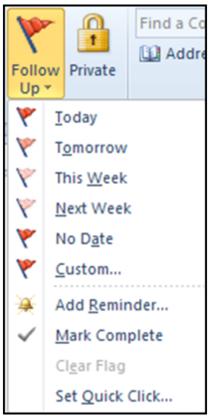
5. Use the shortcut key **CTRL+SHIFT+F.**
6. Choose the **ADVANCED** tab.
7. Choose **FIELD**. A list of fields displays.
8. Choose the field, e.g. All contact fields.A list of all the selected fields displays.
9. Choose the field to search, e.g. Last Name.
10. In the **CONDITION** box, specify a requirement the field must meet, e.g. Is (exactly).
11. In the **VALUE** box, type a value for the field that meets the requirement in the Condition box, e.g. Thomas.
12. ChoosE **ADD TO LIST**. Repeat steps 3 to 10 for each field required.
13. Choose **FIND NOW.**
14. The results of the search are displayed in a table at the bottom of the **ADVANCED FIND** dialog box.
15. To display contact details, double-click on the contact required in the table.
16. On completion, close the contact.
17. The **ADVANCED FIND** dialog box redisplays.
18. To locate additional contacts, choose **NEW SEARCH** and follow Previous steps

Flagging Contacts

You can flag a contact to remind yourself to follow up on an issue or to indicate a request for someone else. You can also use flags to set a reminder for the contact.

- **To Add A Flag:**

MOUSE



1. Select the contact in the folder or open the contact and click onthe follow up button on the ribbon
2. From the menu click the flag you want

➢ **To Remove A Flag:**

MOUSE

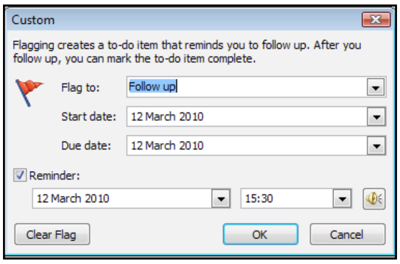
1. Select the contact in the folder or open the contact and click onthe follow up button on the ribbon
2. Click **CLEAR FLAG**.

➢ **To Set A Reminder For A Contact:**

MOUSE

1. Select the contact in the folder or open the contact and click onthe follow up button on the ribbon

Click **FOLLOW UP** from the ribbon



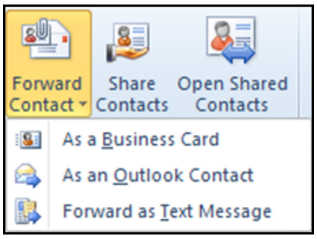
2. Click **ADD REMINDER**
3. In the reminder area, click the down arrow to display a calendar. Click a date on the calendar.
4. In the Time enter the time you want the reminder to display and Click **OK**

Sending Contact Information To Others

Microsoft Outlook supports the use of vCards, the Internet standard for creating and sharing virtual business cards. You can save a contact as a vCard or business card and send it in an e-mail message. You can also add a vCard to your e-mail signature. When you open a vCard, it opens as a contact item, and you can easily save it to your Contacts folder.

➢ <u>To Send A Vcard</u>

MOUSE



1. Click the contact you want to send as a vCard, and then on the **SHARE** group click **FORWARD CONTACT** and from the menu choose **AS A BUSINESS CARD**.
2. The **FORWARD AS BUSINESS CARD** command will not be available for distribution lists you may still forward it as an outlook contact however.

- **To Save A Vcard Attachment To Contacts:**

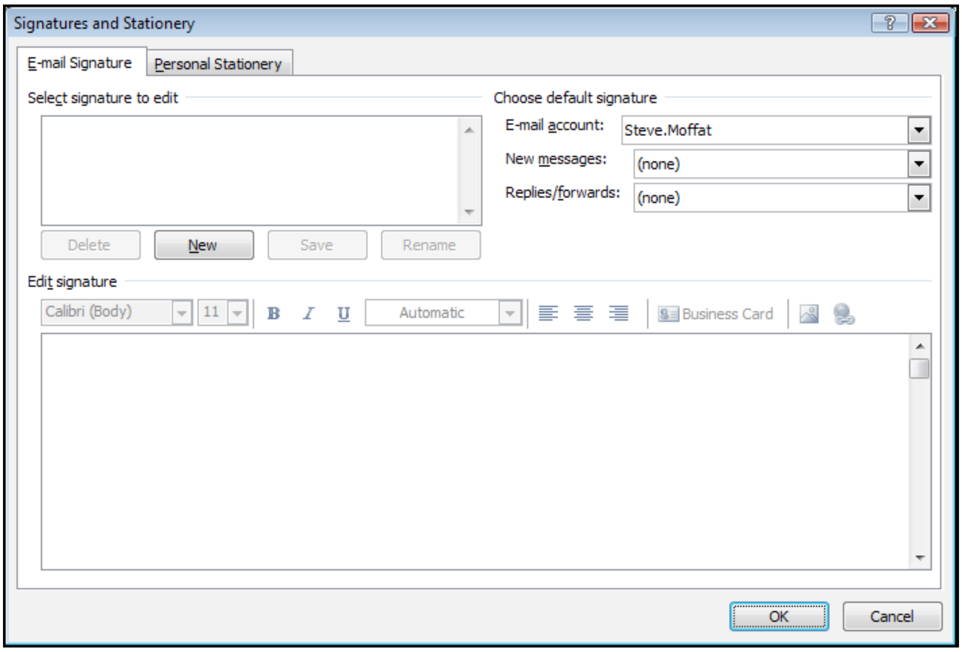
MOUSE

1. Open the message you received.
2. Double-click the attachment to open it.
3. In the open contact, click **SAVE AND CLOSE**.
4. The information in the vCard is saved to your Contacts folder.

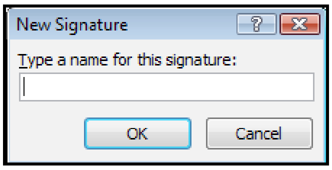
- **To Include A Vcard With Your E-Mail Signature**

MOUSE

1. Go to **BACKSTAGE** view (**FILE TAB**) click **OPTIONS**, and then click the **MAIL** button on the left
2. On the right look down and click thE **SIGNATURES** button a dialog will open.
3. To create a new signature click on the new button.



4. Under Signature, click **SIGNATURES**, and then click New.



5. In the **NEW SIGNATURE** box, enter a name. and click **OK**
6. Using the formatting tools to choose a format for your signature.
7. In the main area type the text you want to include in the signature. You can also paste text to this box from another document.
8. The formatting options will not be useful if you use plain text as your message format.
9. To add an electronic business card - vCard - to the signature, click the business card button, select a vCard from the list, or click New vCard from Contact.
10. Once you've created the signature, you can insert it in all new messages, in all messages you reply to or forward, or just in a specific message.
11. Click **SAVE** to save the signature and **OK** to close the window

➢ **<u>To Create A Vcard From A Contact:</u>**

<u>MOUSE</u>

1. Open the contact you want to save as a vCard.
2. Go to **BACKSTAGE** view (**FILE TAB**) choose **SAVE AS** a save as dialog will open to allow you to save as a vcf file (Vcard).
3. Type a name in the File name box, and then click **SAVE**.

Distribution Lists (Contact Groups)

If a user finds that they are sending messages to the same group of people regularly, a Personal Distribution List may be created. When addressing a message to a Personal Distribution List, all individuals in the group will receive the message. Personal Distribution List names are displayed in bold in the Personal Address Book. In 2010 these are called contact groups.

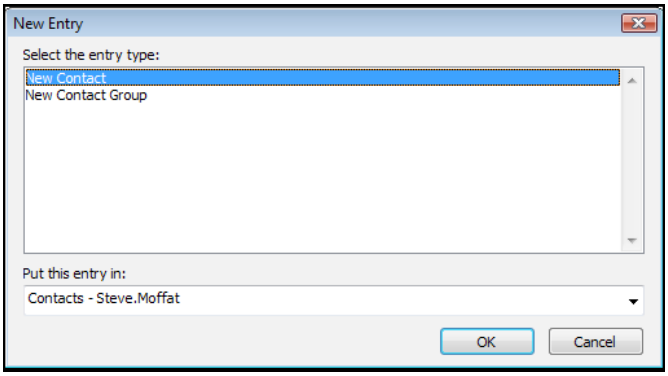
Creating A Contact Group

➢ **<u>To Create A Personal Distribution List(Contact Group):</u>**

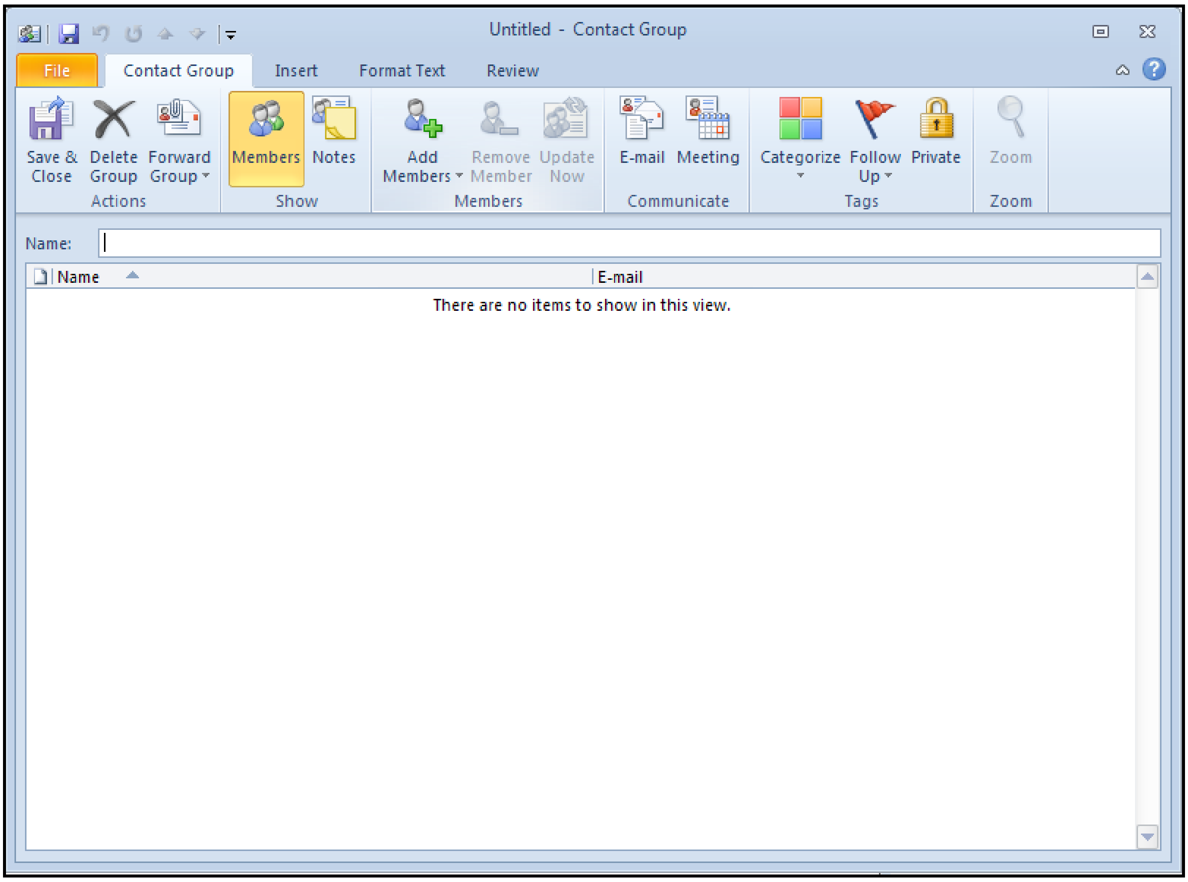
<u>MENU</u>

1. In the contact folder click on **NEW CONTACT GROUP** on the **HOME** ribbon **NEW** group

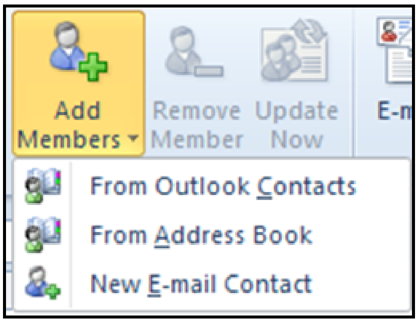
<u>OR</u>



2. Open the **ADDRESS BOOK** from the **FIND** group.
3. Choose **FILE**, **NEW ENTRY** from the address book menu The New Entry dialog box displays.
4. Select **NEW CONTACT GROUP**
5. From thE **PUT THIS ENTRY IN** box use the drop down arrow to choose a contacts folder to store the contact group in.



6. Choose **OK**. The New contact group dialog box displays.
7. In the Name box, type a name for the group, e.g. Mailing list.

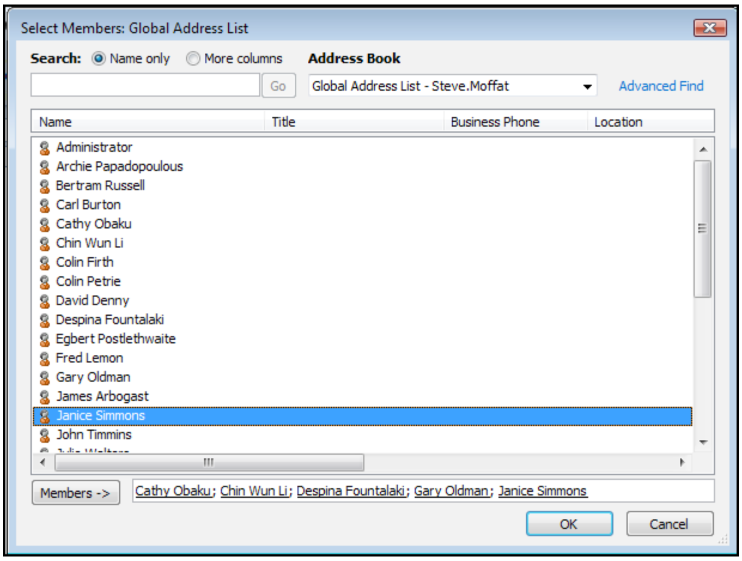


8. Choose **ADD MEMBERS**. **THE ADD MEMBERS** menu displays.

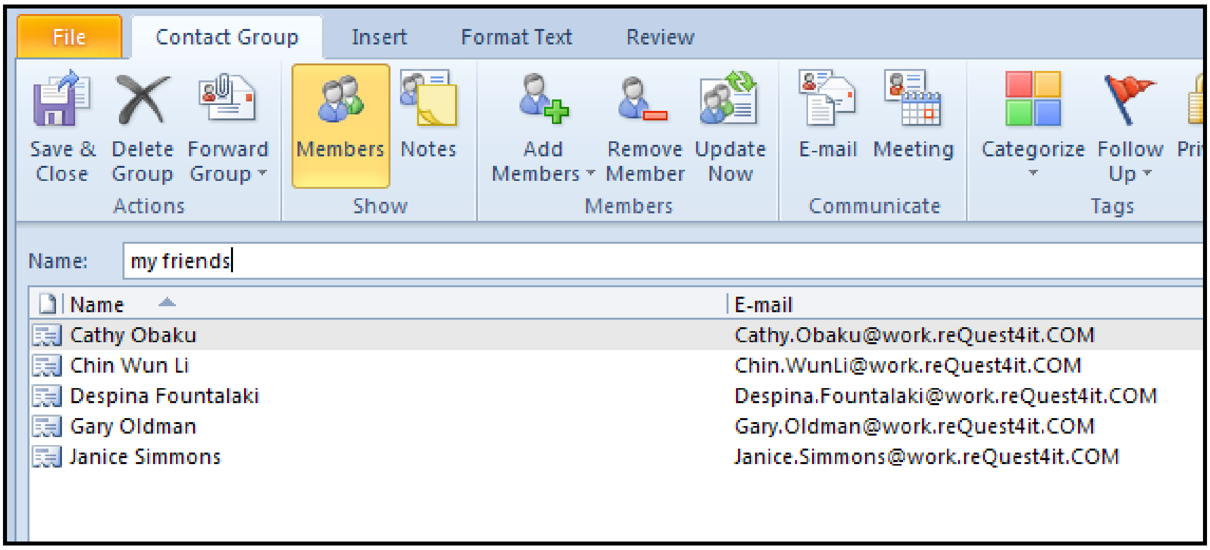
   To add from outlook contacts allows the addition of people you have created who may well be outside your organisation.

   From address book allows access to the global address list to add anyone from within it

New e-mail contact this selection would be a one off choice to add an individual that will not appear in ANY of your address books.



9. Choose from address book the select members dialog appears.
10. Double click to Select the required user names to add to the Contact group.
11. Click Ok to close and add the users to the contact group and display their names in the contact group list box.
12. Add more members from different locations to see their names appear in the list.
13. Give the contact group a name that is recognisable to you.



14. Choose **SAVE AND CLOSE**. The contact group is displayed in the Address Book and the contact folder.

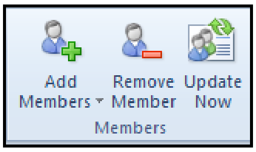
- *The contact group will appear in bold within the address book.*
- *When an email is sent to this contact group it will be sent to everyone within the group*

Editing A Contact Group

A Contact Group can be edited to include new members or remove existing members. The contact group can also be renamed.

➢ **<u>To Remove A User Name:</u>**

<u>MOUSE</u>



1. Open and display the required distribution list from the contact folder it is stored in.
2. In the contact group List box, select the members to be removed.
3. Click the Remove member button from the members group.
4. To close the dialog box, click **SAVE AND CLOSE**

➢ **<u>To Rename A Distribution List:</u>**

<u>MOUSE</u>

1. Open and display the required distribution list from the contact folder it is stored in.
2. Double-click on the required distribution list.
3. In the Name box, type the replacement name for the distribution list.
4. Click **SAVE AND CLOSE**.

➢ **<u>To Use A Personal Distribution List:</u>**

<u>MOUSE</u>

1. Compose a new mail message.
2. Click on the to button. The Select names dialog box displays.
3. Double-click on the required distribution list. The selected distribution list displays in the Message Recipients box.
4. Choose **OK**

<u>OR</u>

1. Type the name of the distribution list on the address field.
2. Complete and send the message.

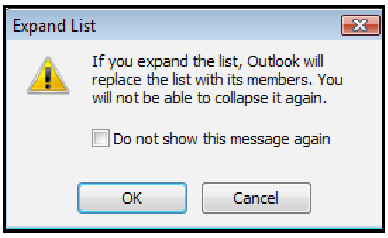
Expanding A List

In 2010 contact groups that are used in addressing an email or creating meetings can be expanded to remove a member or members on a one time basis this does not change the contact group in any way it merely allows you to edit the recipients on this one time basis.

➢ **<u>To Expand And Edit A Contact Group</u>**

<u>MOUSE</u>

1. Create an email
2. Address it with a contact group as described previously.
3. To the left of the contact group in the address box you will see a plus sign.



4. Clicking on this will expand the list to show all of the individual addresses within the group.You will be warned that once expanded it cannot be collapsed again.
5. All the individuals are now in the address box remove any that you do not wish to use by clicking on them to select and pressing the delete key.
6. Complete message and send in the normal way.

Section 8 The Calendar

Objectives:

BY THE END OF THIS SECTION YOU WILL BE ABLE TO:

- View And Navigate Calendar
- Enter Appointments And Events
- Recur Appointments
- Schedule A Meeting
- Set Up And Use Group Calendars
- Set Up Reminders
- Print The Calendar
- Customise The Calendar

Getting Around in the Calendar

The Calendar folder allows the user to keep track of their schedule and plan meetings with others. If the user has the appropriate access rights, they can open other users' Calendar folder and schedule activities or edit existing activities.

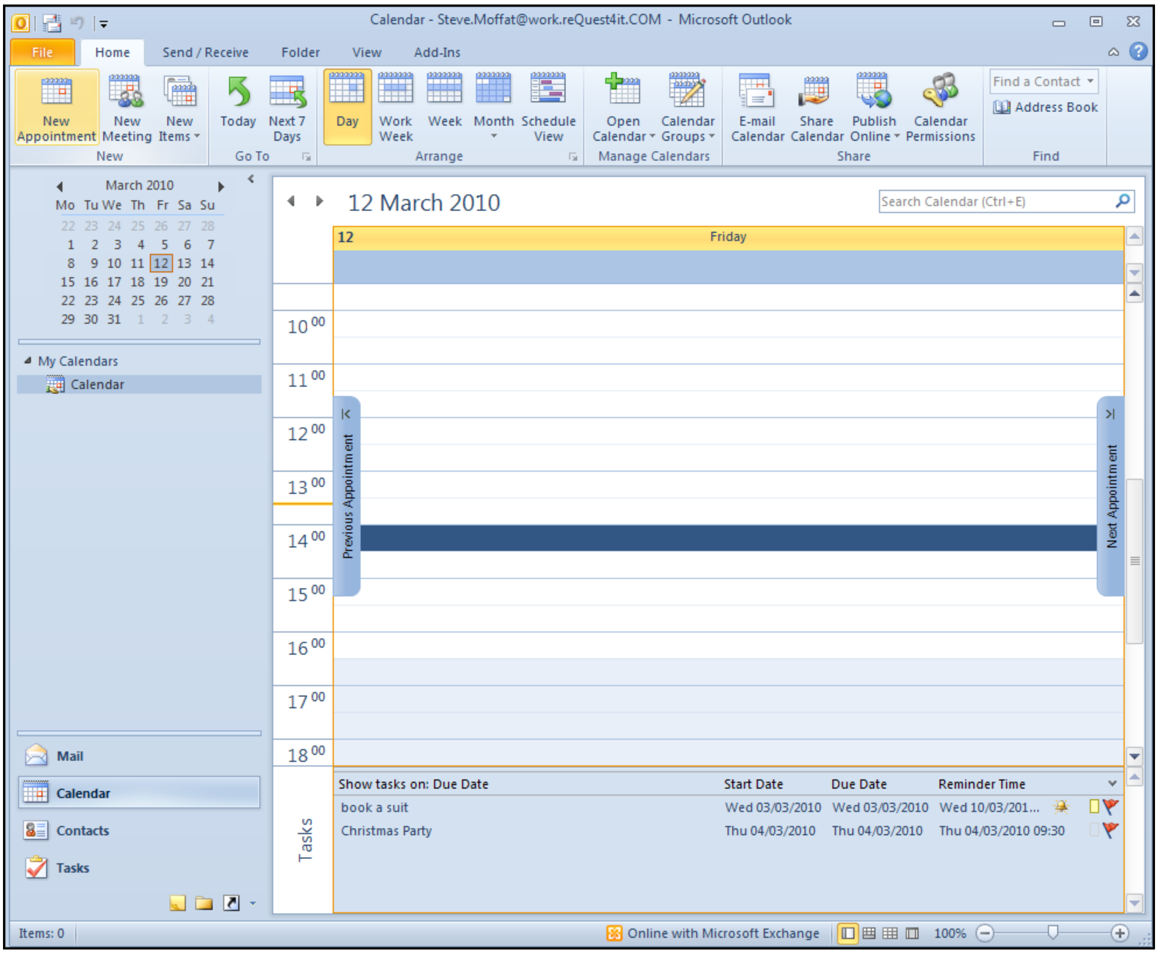
AccessingThe Calendar

➤ **To Open And View The Calendar:**

MOUSE

1. In the **NAVIGATION PANE**, click the **CALENDAR** button to take us to your calendar folder

please remember that the calendar folder appears differently to the contact and email folders you are used to seeing so far and the items stored in this folder will appear differently as well



The ribbon will appear different to being in the mail folder and has calendar specific tools.

By default, the Calendar folder automatically opens showing today's date and displays one day at a time. Alternatively, the Calendar folder settings can be altered to display a week or a month at a time.

On the left a mini calendar (date navigator) is shown for the month you are in and below that shows a list of all calendars you have access to whether other calendars you have created or shared calendars you have permission to view

Below the main calendar area to the right of the navigation pane is your task list that will keep you upto date with all of the tasks you have to do. Emails and contacts that are flagged appear in the panel to keep you reminded of the things you need to accomplish.

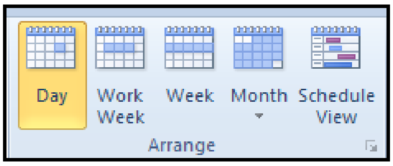
Any appointments that were previous to this day or in the future can quickly be accessed by clicking the next and previous appointment tabs to the left and right in the calendar main window.(In Blue)

Calendar Views

As mentioned you may view your calendar in many ways

➢ **<u>To Display A Day, Work Week, Week And A Month At A Time:</u>**

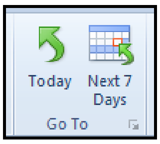
<u>MOUSE</u>



1. Choose a View, Day or Work Week or Week or Month. From thE **ARRANGE** group.

<u>To Display Today's Date:</u>

<u>MOUSE</u>

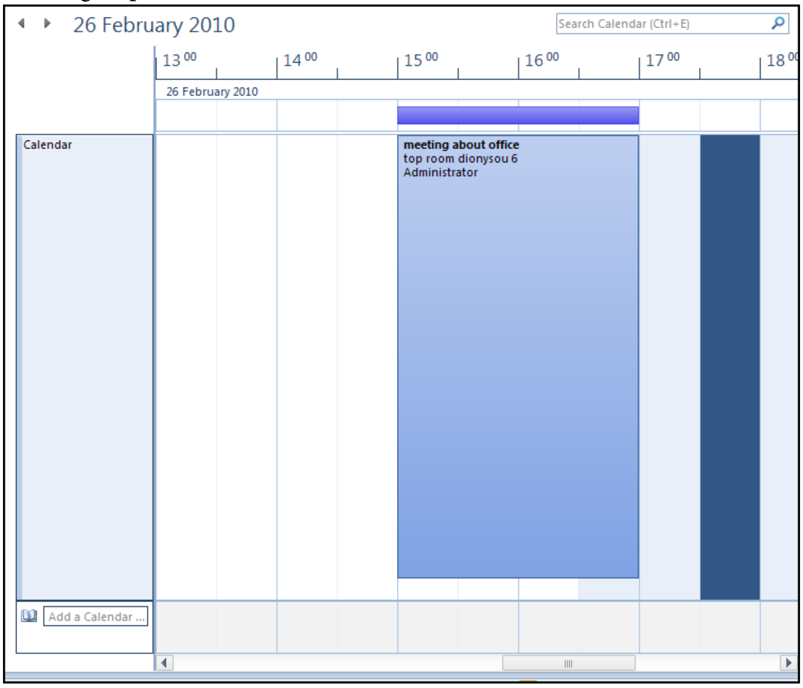


1. Click **TODAY**from the **GO TO** group
2. No matter where you were in the calendar this button will always bring you back to today.

➢ <u>**To View Your Schedule**</u>

<u>**MOUSE**</u>

1. In the **ARRANGE** group a new view is available in 2010 click on **SCHEDULE** to view your work schedule.



2. This view is very useful when used with other calendars you may have access to several colleagues calendars and you are quickly able to see comon times you have free to arrange meetings etc. we will look into this further later on.
3. The schedule is shown on a timeline and you may scroll to the left or right to see the times not in the window.

Moving Between Dates

The Date Navigator is used to quickly select one or more days in the Calendar. Days that display in bold in the Date Navigator indicate days that contain items, e.g. appointments. The current date displays in a border. If an activity has been scheduled on a specific day by mistake, the Date Navigator allows the user to quickly move the activity to another day.

➢ **To Display A Specific Day:**

MOUSE

1. In the Date Navigator,(top right) click the day required. The Calendar now displays the selected day.
- *To display multiple adjacent days, in the Date Navigator click and drag the days required. To display non-adjacent days, press **[CTRL]** and click on the days required.*

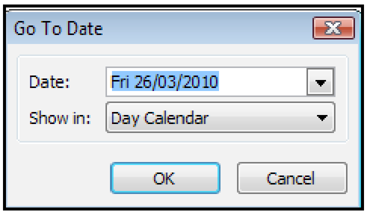
➢ **To Display A Specific Month:**

MOUSE

1. In the Date Navigator, click on the name of month currently displayed, e.g. April. A list of month's displays.
2. Select the month required
3. Release the mouse. The Calendar displays the selected month.

➢ **To Go To A Specific Date:**

MENU



1. Click on the **DIALOG BOX LAUNCHER** on the **GO TO** group a dialog appears.

OR

1. Press **[CTRL] [G]**
2. In the **DATE** box, select the date required
3. To display the date as a single day or within a week or month, in the **SHOW IN** box, select the option required
4. Choose **OK**

Scheduling Appointments

Appointments are activities that you schedule in your calendar that do not involve inviting other people or reserving resources. You can set reminders for your appointments. You can also specify how your calendar looks to others by designating the time an appointment takes as busy, free, tentative, or out of office. You can schedule recurring appointments. You can view your appointments by day, week, or month.

You can schedule an appointment in your own calendar, and others can give you permission to schedule or make changes to appointments in their calendars. Appointments can also be made private.

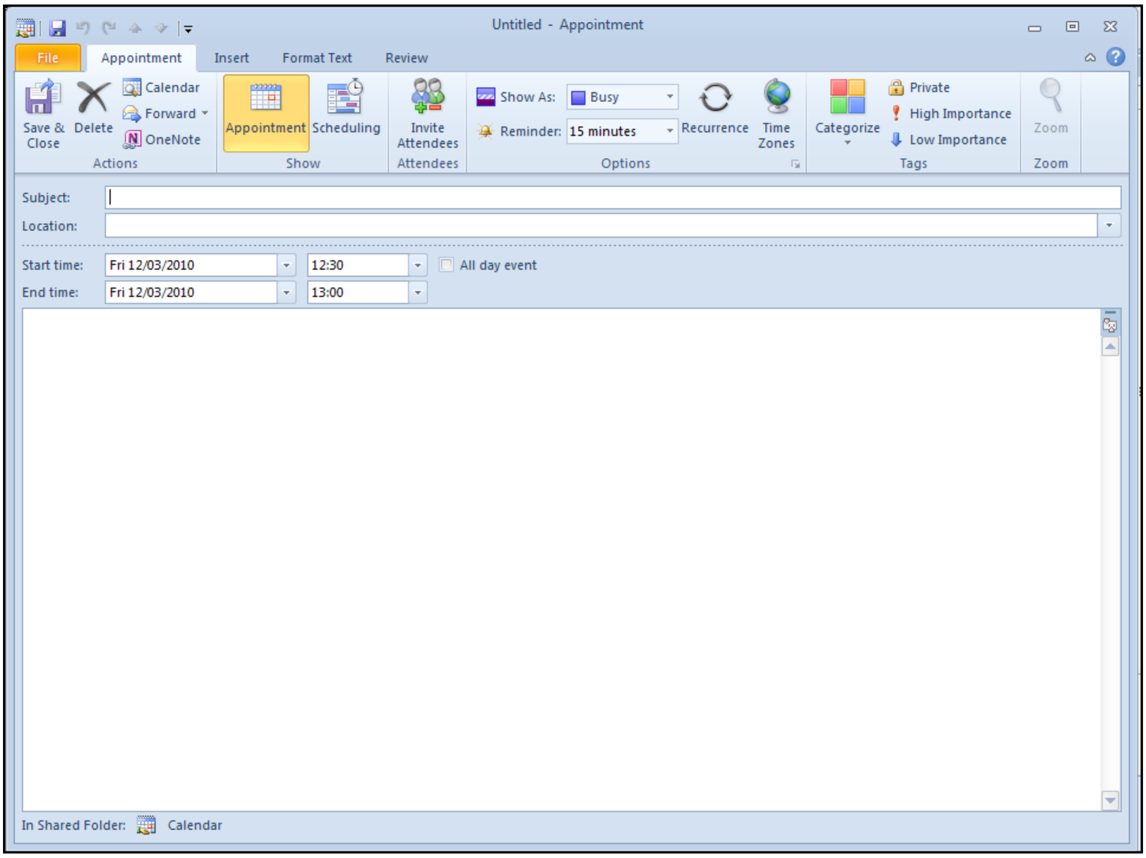
When viewing days, blocks of time that have been scheduled appear with a colour or pattern to indicate how the time is used. The colour or pattern identifies time as free, busy, tentatively busy or out of office.

Time	Colour
Free	Clear or no colour
Busy	Blue
Out of office	Purple
Tentative	Diagonal stripe blue

➢ **To Schedule An Appointment:**

MENU

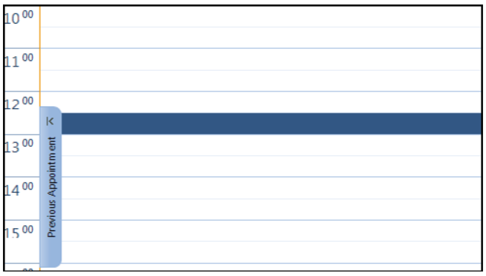
1. Click on the **HOME** tab,**NEW** group, **NEW APPOINTMENT**.



OR

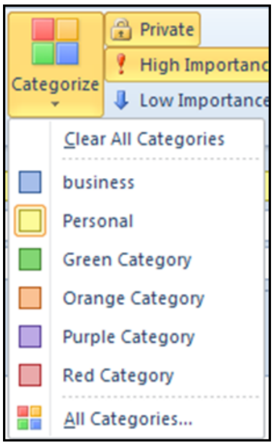
2. In the Calendar folder, click the right mouse button on a date in the Calendar, choose **NEW APPOINTMENT** from the shortcut menu.

OR

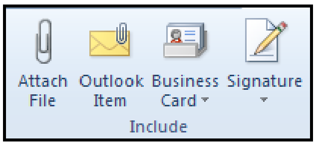


3. Double click on a bar within the calendar to open a new appointment
4. In the **SUBJECT** box, type a description, e.g. Hospital appointment.
5. In the **LOCATION** box, type a location, e.g. Manchester Royal Infirmary.
6. In the **START TIME** box, select the start date and time.
7. in the **END TIME** box, select the finish date and time.
8. In the **SHOW TIME AS** box, in the options group on the ribbon select the time status required, e.g. Busy.

- *The status of an appointment affects how it displays to others when they view the Calendar. By default, appointments display with the busy colour to other users although the contents are not visible.*

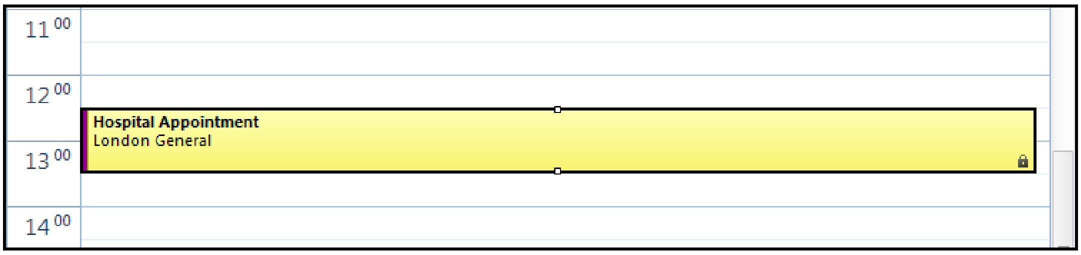


9. If required, in the main message box, type the appointment details or other information pertinent to the appointment.
10. Click on the **CATEGORIZE** button and from the menu choose a category for your appointment
11. To hide the contents of this item so others who have access to this folder cannot see it, choose **PRIVATE** from the **TAGS** group.
12. In the **OPTIONS** group choose a reminder time the default is 15 minutes.
13. Choose an Importance level for the appointment from the **TAGS** group. The default is normal importance choose **HIGH** or **LOW.**



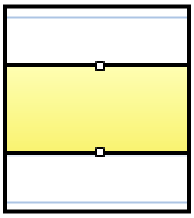
14. Add any corresponding attachments if you wish using theoptions from the **INCLUDE** group on the **INSERT** tab as we did within mail messages.
15. To save the appointment, click **SAVE AND CLOSE**. The appointment now displays in the Calendar.

- *If an appointment has been set as private, a padlocksymbol will display next to it in the Calendar.*



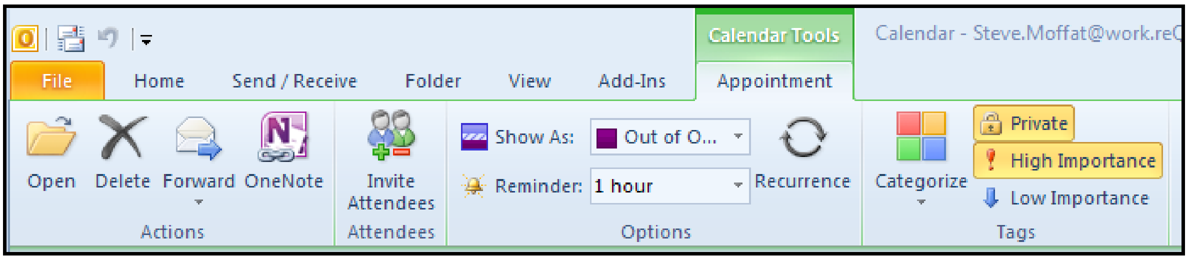
➢ <u>**To Select An Appointment:**</u>

<u>**MOUSE**</u>



1. Display the required date and click on the appointment.
2. The appointment is selected.
3. When selecting an appointment **SIZING HANDLES** display at the top and bottom. (little white squares)

4. A new ribbon appears to work with the selected appointment.



➢ To Edit An Appointment:

MOUSE

1. Select the appointment to edit.
2. On the **APPOINTMENT** ribbon in the **ACTIONS** group click**OPEN**.

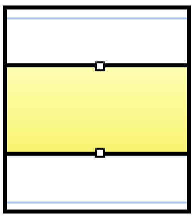
OR

3. Double click on the appointment to Open.
4. The appointment form displays.
5. Edit the appointment as required, e.g. change the start and end times.
6. Click **SAVE AND CLOSE**.

➢ To Move An Appointment:

MOUSE

1. Click and drag the appointment to move.



2. To change the date an appointment is scheduled, click and drag the appointment to the date required in the Date Navigator Release the mouse.

➤ **<u>To Change The Time An Appointment Is Scheduled For,</u>**

<u>MOUSE</u>

1. Click and drag the appointments move handle to the time required.

➤ **<u>To Copy An Appointment:</u>**

<u>KEYBOARD</u>

2. Select the appointment to copy
3. Use the shortcut key **CTRL+C** to copy
4. Select the new date and time for the appointment.
5. Use the shortcut key **CTRL+V** to paste.

<u>MOUSE</u>

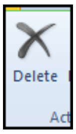
6. Press **[CTRL]** + click and drag the appointment to the time required.

<u>OR</u>

7. Press **[CTRL]** + click and drag the appointments move handle to the date required in the Date Navigator.
8. Release the mouse.

➢ **To Delete An Appointment:**

MENU



1. Select the appointment no longer required.
2. Click **DELETE** on the **ACTIONS** menu on the **APPOINTMENT** ribbon.

MOUSE

1. Select the appointment no longer required.
2. Right click the appointment and select delete from the shortcut menu.

Setting An Appointment Reminder

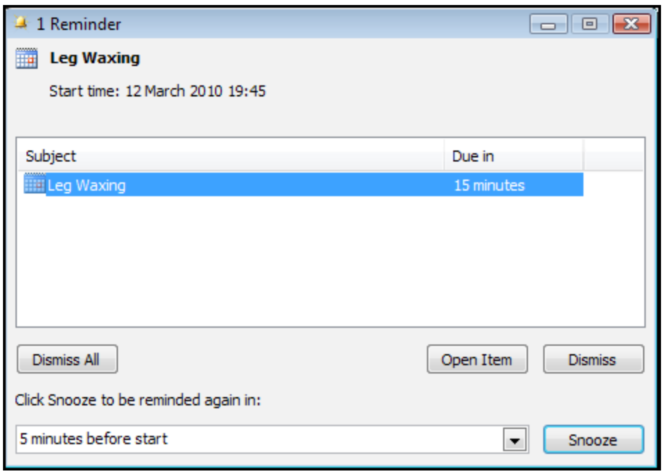
When the user schedules an appointment in the Calendar, they can also set a reminder. The reminder dialog box will display at an interval set by the user prior to the appointment. E.g. 15 minutes prior to the appointment.

➢ **To Set An Appointment Reminder:**

MOUSE

1. Open the appointment to set a reminder for.

OR



2. Create a new appointment.
3. In the **OPTIONS** group choose a reminder time the default is 15 minutes.
4. If you do not wish a reminder set the time to none.
5. To customise the reminder action for this appointment, click the **DIALOG BOX LAUNCHER** to select the sound to play and choose **OK**.
6. On completionClick **SAVE AND CLOSE**.

- *When the time set for the reminder is reached, the Reminder dialog box will display and the selected sound will play.*

7. You have the option to dismiss a specific reminder or snooze and reset the reminder time closer to the time of the appointment.

Recurring Appointments

If the user wants an appointment to repeat, instead of copying the appointment repeatedly, they can designate it as a recurring appointment.

A symbol displays in the Calendar next to recurring appointments.

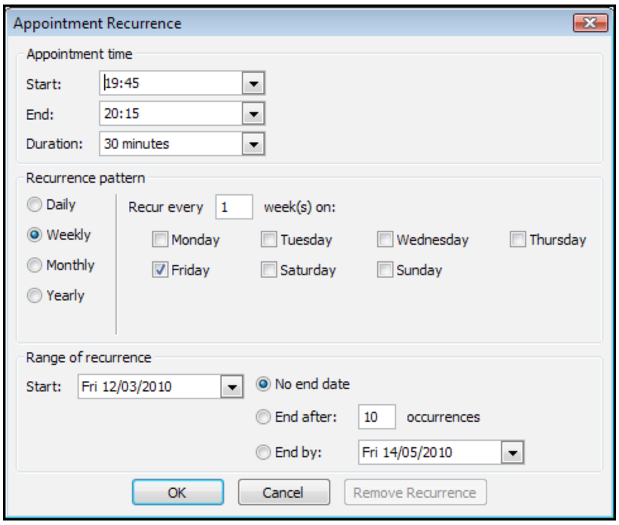
➢ **<u>To Create A Recurring Appointment:</u>**

<u>MENU</u>

1. Open the appointment and choose from the **OPTIONS** group, **RECURRENCE**.

<u>OR</u>

2. Create a new appointment
3. If the appointment is a new appointment, create the appointment as required, i.e. add subject and location, start and end times.and choose from the **OPTIONS** group, **RECURRENCE**.



4. The **APPOINTMENT RECURRENCE** dialog box displays.
5. Choose the optionsrequired for your recurrence.
6. Ensure the **APPOINTMENT TIME** and duration are set correctly
7. Set the **RECURRENCE PATTERN** as you would like it to apply.
8. Make sure the **RANGE OF RECURRENCE** is correct
9. Choose **OK**.
10. Click **SAVE AND CLOSE**.

➢ <u>To Edit All Occurrences Of A Recurring Appointment:</u>

<u>MENU</u>

1. Open any occurrence of the recurring appointment.
2. The **OPEN RECURRING ITEM** dialog box displays.
3. Choose **OPEN THE SERIES**.
4. Click**OK**.
5. Edit the appointment as required, e.g. change the subject, location, start or end times.
6. To change the appointment time, recurrence pattern or range of recurrence, choose from the **OPTIONS** group, **RECURRENCE**., select the options required and choose **OK**.
7. Click **SAVE AND CLOSE**.

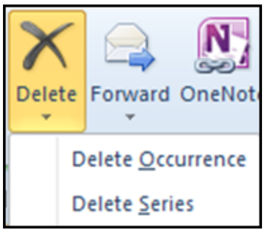
➢ <u>To Edit Only One Occurrence Of A Recurring Appointment:</u>

<u>MENU</u>

1. Open the recurring appointment to change
2. The **OPEN RECURRING ITEM** dialog box displays.
3. Choose **OPEN THIS OCCURRENCE**.
4. Choose **OK**.
5. Edit the appointment as required e.g. change the location.
6. Click **SAVE AND CLOSE**.

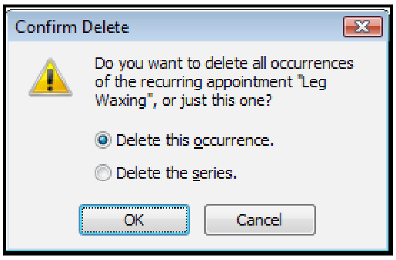
- **To Delete All Occurrences Of A Recurring Appointment**

MOUSE



1. Select any occurrence of the recurring appointment to delete.
2. On the **APPOINTMENT** ribbon click the **DELETE** button and make a choice from the menu to delete the series
3. The series will be deleted

OR

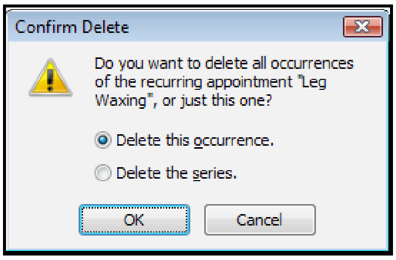


4. Press **[DELETE]**on the keyboard. The **CONFIRM DELETE** dialog box displays.
5. Choose **DELETE THESERIES**.
6. Choose **OK**.

- **To Delete One Occurrence Of A Recurring Appointment:**

MOUSE

1. Select any occurrence of the recurring appointment to delete.
2. On the **APPOINTMENT** ribbon click the **DELETE** button and make a choice from the menu to delete the occurrence selected.



3. The occurrence will be deleted.

<u>OR</u>

1. Press **[DELETE]** on the keyboard. The **CONFIRM DELETE** dialog box displays.
2. Choose **DELETE THIS OCCURANCE**.
3. Choose **OK**.

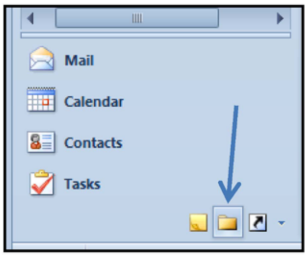
- *If the user moves a recurring appointment, only the selected occurrence of the appointment is moved. If the user wishes to move all occurrences of the appointment, they should open the appointment series and edit the recurrence pattern.*

Message To Appointment

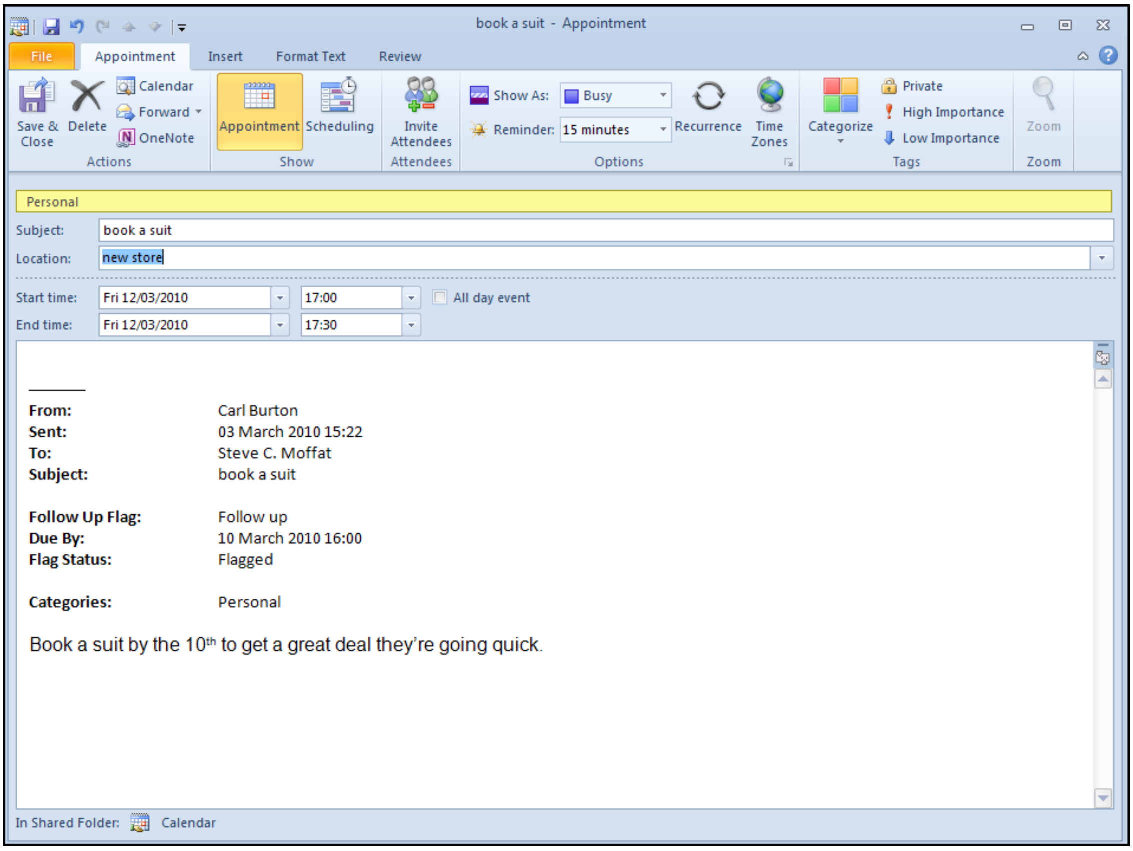
Appointments can be added to the Calendar using mail messages, e.g. a mail message relating to a sales meeting can be used to create an appointment scheduled with the user's Sales Manager.

➤ To Create An Appointment Using A Mail Message:

MOUSE



4. Go to the folder list so the navigation pane shows all folders.
5. In the relevant mail folder locate your message, click and drag the relevant mail message onto the calendar folder.
6. Release the mouse. Calendar opens a new appointment form. The mail message displays in the Text box.



7. Add the options required i.e. subject, location, start and end times.
8. Click **SAVE AND CLOSE**.

Meetings

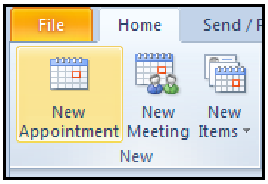
A meeting is an appointment to which other people and resources are invited. A resource could be a room, computer, overhead projector, flip chart or any equipment that is needed at the meeting. Resources can be invited to a meeting in the same way as people.

The Attendee Availability is used to create and send meeting requests and to reserve resources. When a meeting is created, the user identifies the people and resources they want to invite and they choose a meeting time. If required, a meeting can be scheduled to recur daily, weekly, monthly or yearly in the same way as any other appointment. Once a time has been determined for the meeting, invitations can then be sent in a meeting request. An invitee can accept or decline the invitation. If the invitee accepts, Outlook adds the meeting to the invitees' calendar.

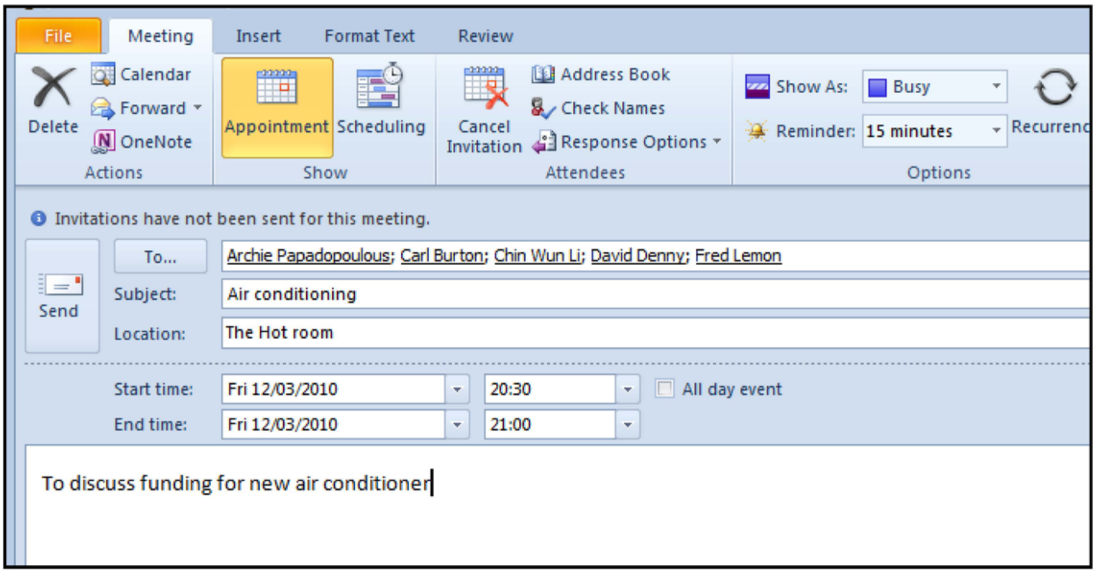
Create A Meeting

➢ **To Plan A Meeting:**

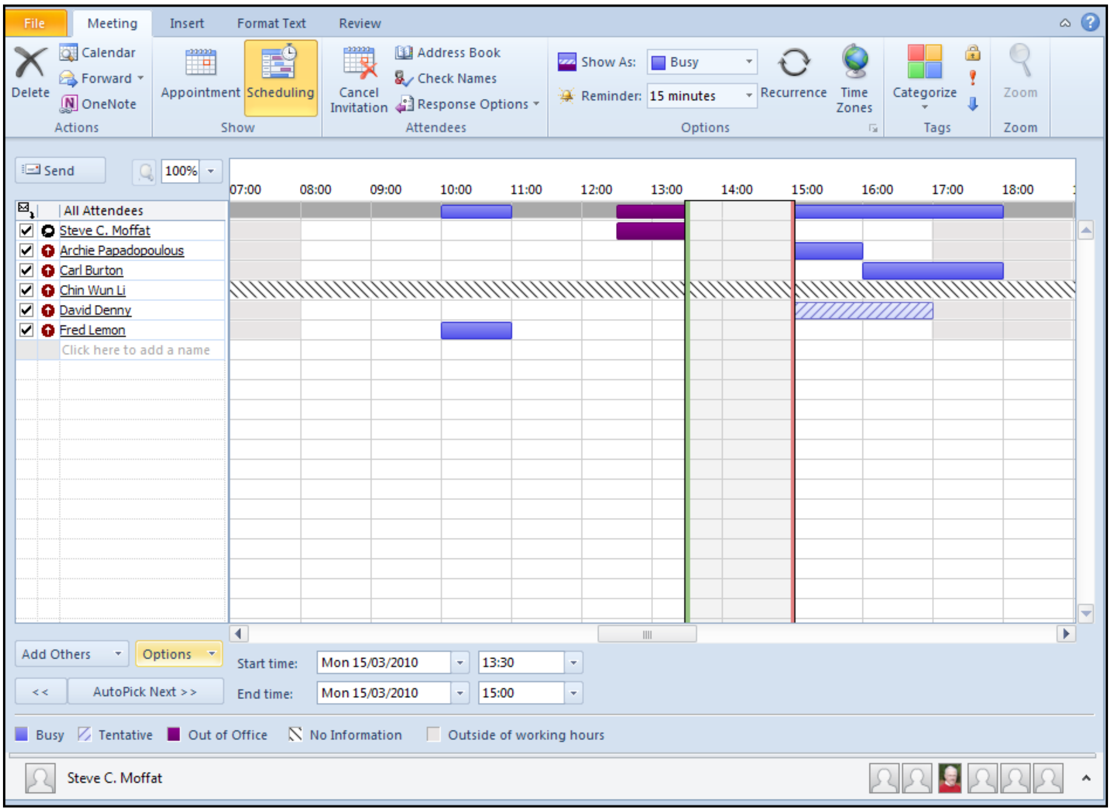
MOUSE



1. In the **CALENDAR** folder on the **HOME** ribbon in the **NEW** group choose**NEW MEETING**.
2. In the **TO** box type in the names of the attendees and check names. Or ckick on the **TO:** button and select the attendees from the address books.



3. Enter the **SUBJECT** of the meeting and its **LOCATION**
4. Set the **START TIME** and the **END TIME** of the proposed meeting.
5. Set **REMINDER** if desired.
6. Set **IMPORTANCE** from the tags group.
7. Set a **CATEGORY** from the tags group.
8. Click on the **SCHEDULING** button in the **SHOW** group.



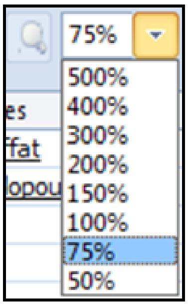
In this view you are able to view the calendars of the other attendees to the meetings as you can see from the colour coding some of those have appointments already. Some are out of the office and some have tentative meetings.

One of the attendees has not had their free busy information published and his calendar has the black stripes to it,

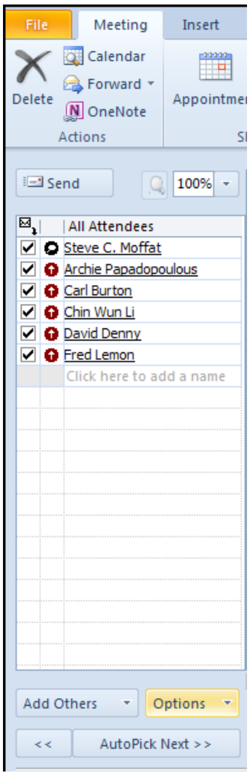
In the topmost bar the busy times are consolidated toshow the times that are available to all attendees.

9. Use the Scroll bars to display a different date and time if necessary for the meeting when all attendees are free.
10. Click on the grid to display the meeting selection bars. (Green and pink bars)
11. Click and drag the Meeting Start Time selection bar (Green) to the time the meeting is to begin.
12. Click and drag the Meeting End Time selection bar (Pink) to the time the meeting is to finish.Whilst dragging the selection bars, the mouse changes shape to a double ended arrow.

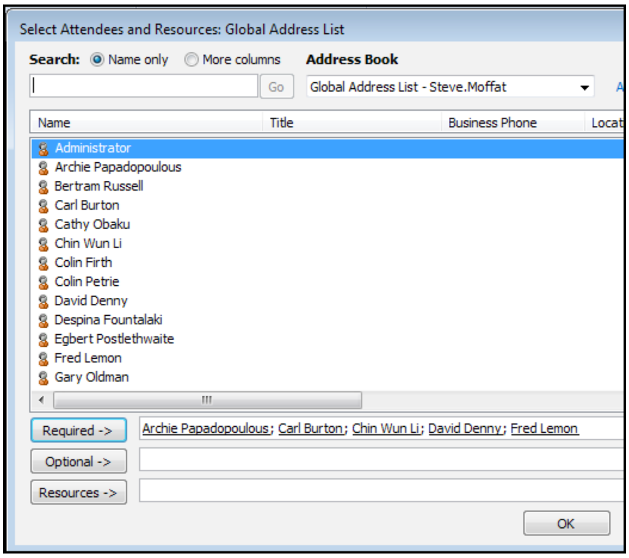
OR



1. In the Meeting **START TIME** box, type the start date and time required.
2. In the Meeting **END TIME** box, type the date and time the meeting is to end.
3. To show more than one day in the grid click on the zoom control to the left of the timeline and select a zoom setting.
4. To change the display of the hours in the grid to show only working hours, choose **OPTIONS**, **SHOW ONLY MY WORKING HOURS**.

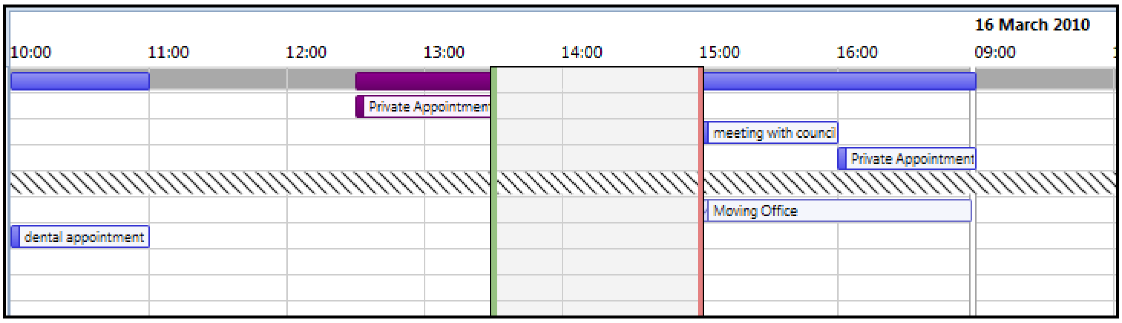


5. If at this point you wish to invite other people and add resources to the meeting, either type the names in the **ALL ATTENDEES** grid or click **ADD OTHERS** and choose **ADD FROM ADDRESS BOOK**.
6. The **SELECT ATTENDEES AND RESOURCES** dialog box displays.



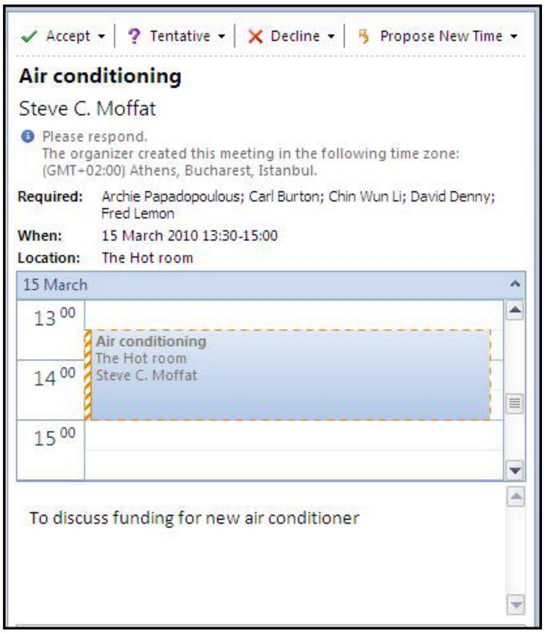
7. In the List box, select the name of the person or resource required at the meeting.
8. Click the**REQUIRED** or **OPTIONAL** or **RESOURCES** to add the selected people in the correct group
9. Repeat these last two steps for each person and resource required and choose **OK**.
10. Use the Scroll bars to view the free/busy time for invitees and adjust the meeting start and end time if necessary as discussed.

11. If you wish to see what the appointments are concerning that the other attendees have (to judge the importance of the meeting time) Click on the **OPTIONS** button and click on **SHOW CALENDAR DETAILS**



12. If you have the necessary permissions and the appointments are not marked as private you may see the appointment information in the schedule.
13. When all options have been set and you are satisfied with the settings of your meeting click the **SEND** button to send the invitation to all the recipients in the all attendees list.
    The meeting request is sent to the invitees in the form of a mail message. Invitees open the meeting request mail message in the same way as any other mail message. Meeting request mail displays in the Inbox with a symbol attached to it. Once the meeting request message is opened, the invitee has the choice of accepting or declining the meeting.

Responding To A Meeting Request



When a meeting request arrives in your mailbox it is not just for information you need to respond to it. When you respond it is added into your calendar and a response sent to the meeting organiser his outlook calendar will keep track of these responses so he knows who will and who won't be attending.

Quick View

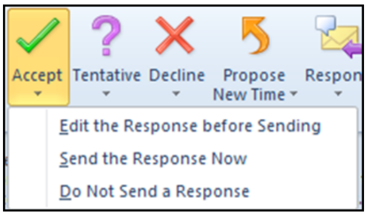
When you receive a meeting request, Quick View helps you better understand how a meeting request affects your calendar. When creating or responding to a meeting request, a calendar snapshot appears in the meeting request. You can instantly review any conflicts or adjacent items on your calendar To Respond To A Meeting Request:

MOUSE

1. In the reading pane you may wish to respond from the options shown at the top of the e-mail preview.

OR

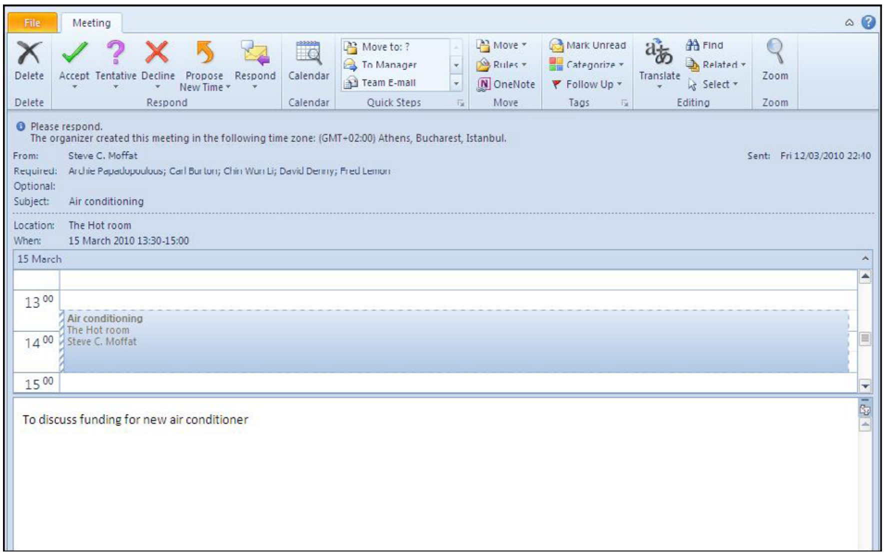
1. In the lnbox folder, open the meeting request mail message.
2. To see the meeting time in the Calendar before responding to it, choose Calendar from the calendar group you will see the suggested meeting marked in tentatively pending your response on completion close the Calendar.



3. To accept the meeting and place it in the Calendar properly, choose **ACCEPT** from the respond group and make a choice of how you wish to respond

OR

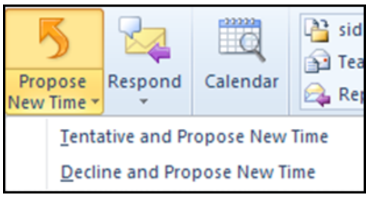
1. To tentatively accept the meeting and place it in the Calendar, choose **TENTATIVE** from the respond group.



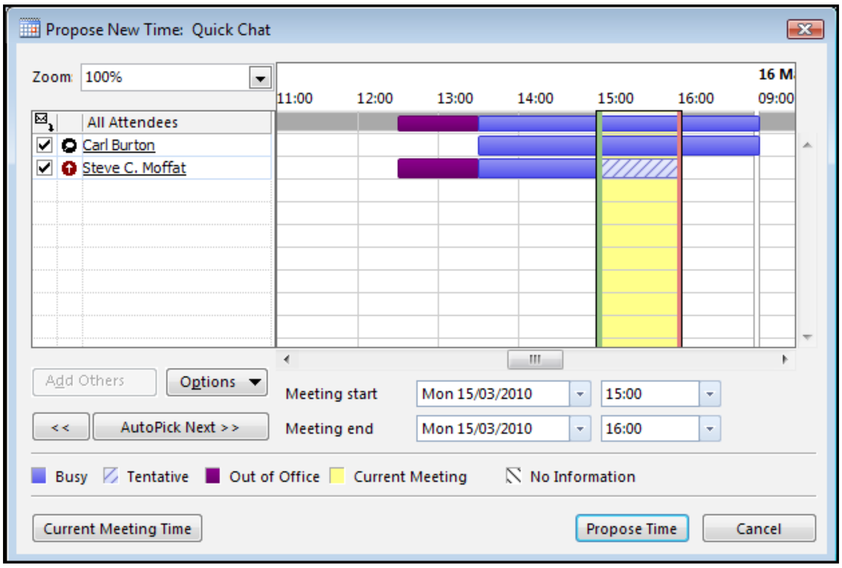
OR

1. To decline a meeting, choosE **DECLINE**. and make a choice of how you wish to respond

OR



1. To propose an alternative meeting time, click **PROPOSE NEW TIME**. Select from the two options in the menu to open the propose new time window.
2. Choose the time you would like to propose and click **PROPOSE TIME** in the **PROPOSE NEW TIME** window.



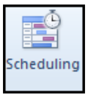
3. A response is automatically generated for you to add your comments to and send to the meeting organiser.
4. The meeting organiser receives meeting responses and comments in the form of mail messages. In the Inbox, meeting response messages have symbols attached indicating the response chosen.

Meeting response messages are opened and replied to in the same way as any other mail message.Once a meeting has been accepted, it is scheduled in the Calendar and has a symbol attached to it.

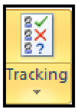
- **To Edit A Scheduled Meeting:**

MOUSE

1. In the Calendar folder, open the meeting to edit the meeting details.
2. Edit the details as required.



3. To display a time grid showing free and busy times on the invitees schedules, choose the **SCHEDULING** button.



4. To display the status and responses of people invited to the meeting, choose the **TRACKING** button.
5. To inform invitees of the alterations made, click **SEND UPDATE**.

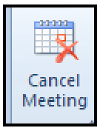
<u>OR</u>

6. To alter the detail in the Calendar but not inform invitees, click **SAVE AND CLOSE.**

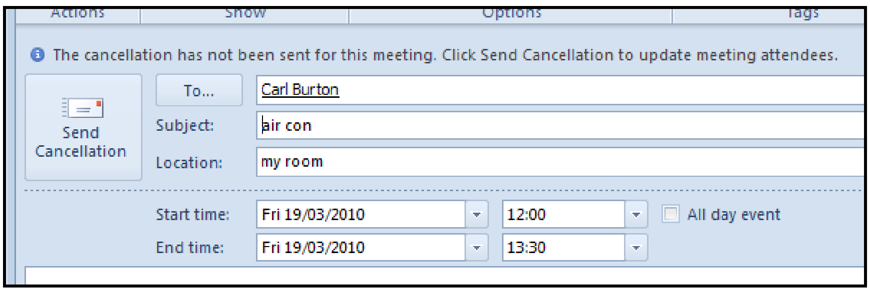
➢ **<u>To Cancel A Meeting:</u>**

<u>MENU</u>

1. Select n the calendar the meeting to cancel.



2. Choose the**CANCEL MEETING** button. A message displays prompting the user to send cancellation.
3. Enter any comments and click send cancellation button.
4. To send a response with comments to invitees, choose Send cancellation and delete meeting, choose **OK**, type comments required and choose the Send button.

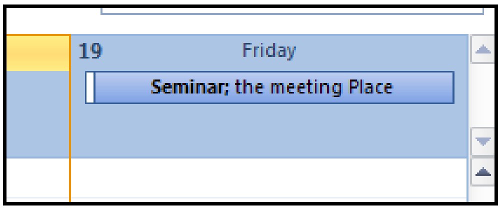


OR

1. In the Calendar folder, select the meeting to cancel.To delete the meeting without informing invitees
2. Click the **DELETE** button.

Events

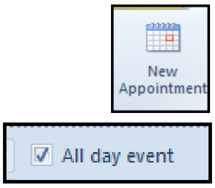
An event is an activity that lasts 24 hours or longer. Examples of an event include a trade show, the Olympics, a vacation, or a seminar. Usually, an event occurs once and can last for one day or several days, but an annual event, such as a birthday or anniversary, occurs yearly on a specific date.



Events and annual events do not occupy blocks of time in your calendar; instead, they appear in banners. An all-day appointment displays time as busy when viewed by others, while an event or annual event displays time as free.

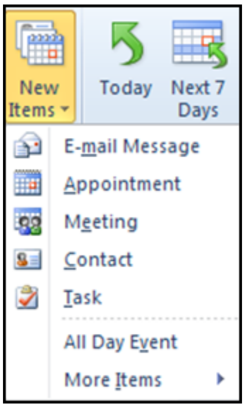
- **<u>To Create An Event:</u>**

<u>MENU</u>



1. In the Calendar **HOME** Ribbon **NEW** group **NEW APPONTMENT.**
2. Add the options required, e.g. subject, location, Select the **ALL DAY EVENT CHECKBOX.**
3. You may wish to Change the status from free to out of office.
4. Click **SAVE AND CLOSE.**

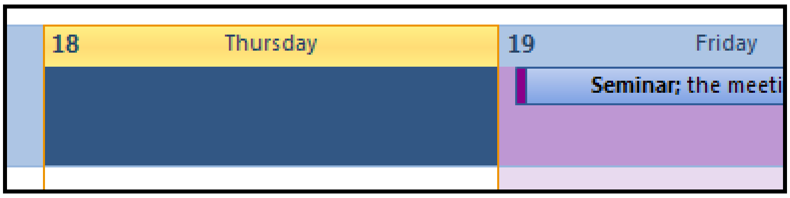
<u>OR</u>



1. In the Calendar **HOME** Ribbon **NEW** group choose the new Item drop down list and select new **ALL DAY EVENT**
2. Follow previous steps for entering information and changing status.

<u>OR</u>

1. In Day/Week/Month view, double-click the banner of the day the event is to take place



2. Follow previous steps for entering information and changing status.

➢ **To Edit An Event:**

MOUSE

1. Double-click on the event banner.
2. Edit the event as required, e.g. change the subject.
3. Click **SAVE AND CLOSE.**

An event can be changed into an appointment, causing the time to be blocked out in the Calendar

➢ **To Change An Event Into An Appointment:**

MOUSE

1. Double-click on the event to change.
2. Untick the **ALL DAY EVENT** checkbox. Events are defined as lasting from midnight to midnight; clearing this check box allows specific times to be added.
3. Add the start and end times required.
4. Click **SAVE AND CLOSE.**

➢ **To Create An Annual Event:**

MOUSE

1. Create a new event adding the options required, e.g. subject and location.
2. Select the date or day of event required.
3. Choose **RECURRENCE**.
4. Choose **YEARLY**.
5. Choose **OK** and Click **SAVE AND CLOSE.**

- **<u>To Delete An Event</u>**

<u>MOUSE</u>

1. Open the event to delete
2. Click on the **DELETE** button on the ribbon

<u>OR</u>

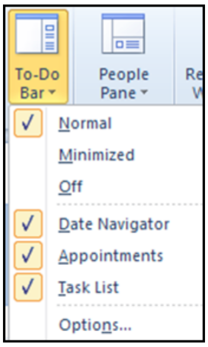
1. Right click on the event to delete
2. Choose **DELETE** from the shortcut menu

The To Do Pane

The To Do Pane is a view of the user's Task list held in the Tasks folder. The To Do Pane in 2010 has additional features that allow you to see flagged messages (as these are by definition "to follow up", they become a task.) The user can schedule time to work on a task by dragging the task from the To Do Pane to a block of time in the Calendar.

➤ **To View The To Do Pane**

MOUSE



1. Choose the **VIEW** ribbon, select the **TO DO PANE** from the **LAYOUT** group.
2. Select **NORMAL**
3. The to do bar appears

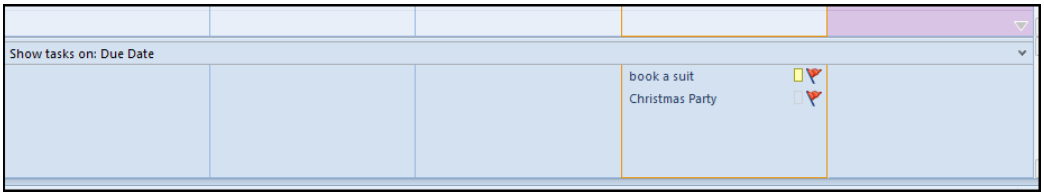
➤ **To Schedule Time To Work On A Task:**

MOUSE

1. Click and drag the task from the To Do Pane to the date and time required in the Calendar.
2. Release the mouse the appointment appears changed from a task
- *The default time for a task is 30 mins you may need to open the appointment to change the time you wish to allot to this task*
3. Open the appointment and Add the start and end times required.
4. Choose options required, e.g. set reminder.
5. Click **SAVE AND CLOSE.**

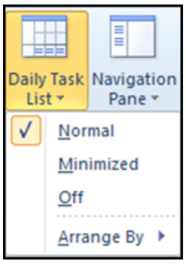
Daily Task List

In addition to the to do bar. Tasks are shownat the bottom of the calendar in a daily task list when in day, work week view and weekly view **BUT NOT** on monthly view. They will ONLY show tasks that have a due date set on them. Flagged emails have dates set and so will appear in this daily task list as reminders they have to be fulfilled. We will deal with tasks in a later section this daily task list can be turned on and off to suit your needs.



➢ **To Turn The Daily Task List On/Off**

MOUSE



1. Choose the **VIEW** ribbon, select the **DAILY TASK LIST** from the **LAYOUT** group.
2. Select **NORMAL** to turn it on or **OFF** to hide it.

Using Categories

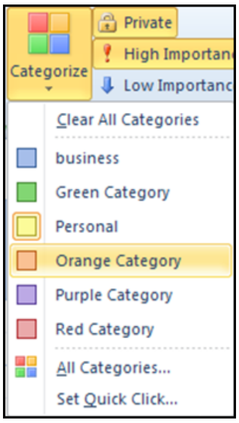
All items in Outlook can be assigned to categories. A category is a key word or phrase that the user can assign to an item to assist them in keeping track of it. If items are categorised, they can be found or grouped easily, e.g. categorise all personal items that the user records in Outlook in the Personal category. An item can be assigned to more than one category. The All categories list can be used to assign categories. To items or the ribbon option.

Applying A Category

Categories in 2010 are colour categories but can be named with things such as personal, business, project etc

- **<u>To Categorise An Appointment:</u>**

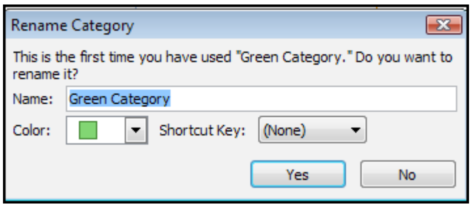
<u>MENU</u>



1. Select the appointment to categorise.

<u>OR</u>

1. Open the appointment.
2. Choose the **CATEGORIZE** button on the ribbon.
3. From the Available categories, select the category to add the appointment to, **E.G**. Red, Yellow, blue



4. The first time a category is used you will be prompted to give the category a name so enter a name
5. Click **YES**when you have done so.
6. If you prefer not to give a name click no the category will still be applied but the category will have the colour name as before.
7. If appointment is open Click **SAVE AND CLOSE.**

Creating Categories

When assigning an item to a category, if the category required is not on the Category list the user can create new categories and add them to the list.

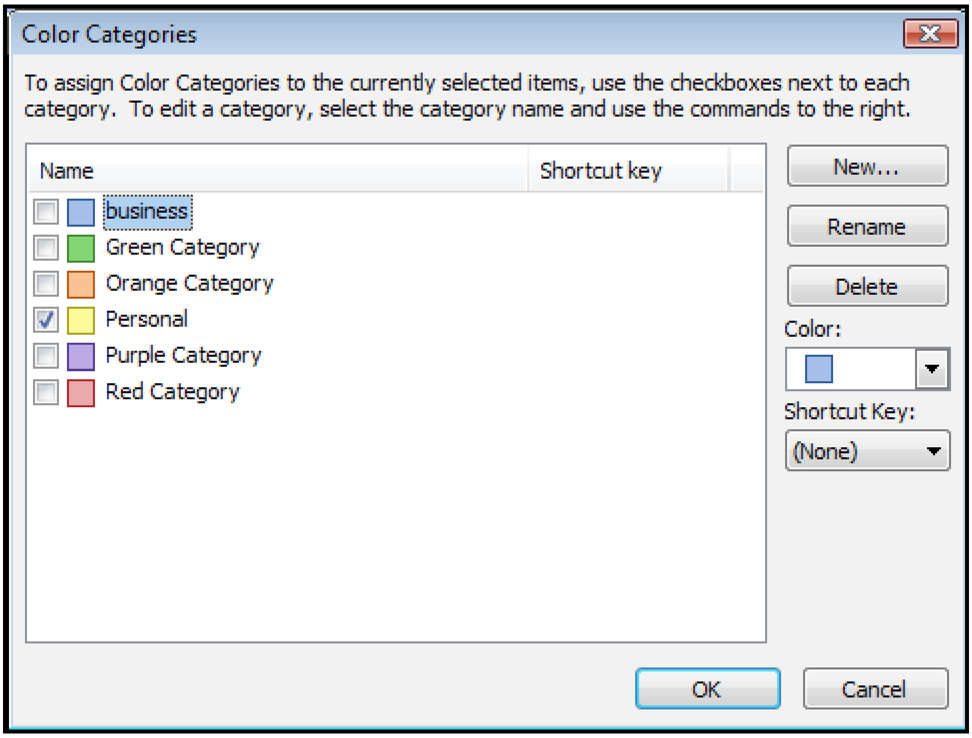
➤ **To Create Categories:**

MENU

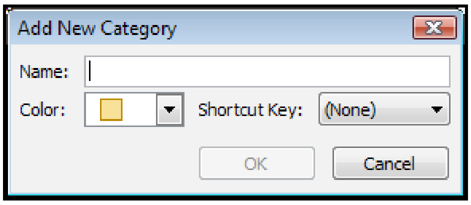
1. Open the appointment to categorise

OR

1. Select the appointment.
2. ChooseCategorize from the ribbon and all categories.
3. The Color categories dialog will open. (following Page)
4. From this dialog we can assign several categories in one go, create new categories and rename or remove previously created categories.



5. Click on the **NEW..** Button to create a new category. The add new category dialog will open.



6. Give the category a name and select a colour from the colour palette
7. Assign a shortcut key if you desire.
8. Choose **OK**the category will appear in the color categories dialog.

- *The Categories feature is also available when using other all the other Outlook folders from notes to emails and is used in exactly the same way.*

Mulitple Categories

Remember you may assign an item as belonging to several categories at the same time so that when searching you will not miss the item as only belonging to one category you may not remember or think of during a search.

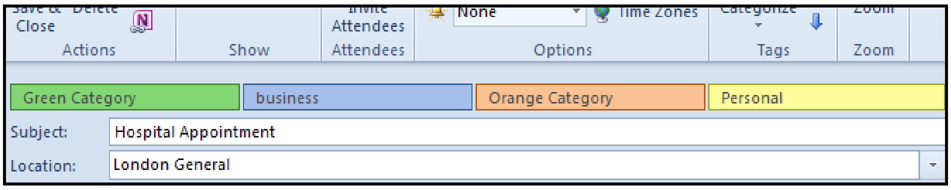
E.G. A meeting could be for business but also part of a project it could also have a financial requirement all of these things could be different categories within outlook.

➢ <u>**To Apply Multiple Categories**</u>

MOUSE

1. Select the appointment to categorize
2. Apply a category from the categorize button as previously shown
3. Use the categorize button a second time and select a second category and a third.
4. The appointment will show the colour of the last category to be selected

5. The appointment will show colour bars within the preview showing what other categories the appointment belongs to.
6. If you open the appointment the categories are displayed with their names below the ribbon.



OR

1. Select the appointment to categorize
2. Click on the **CATEGORIZE** button on the ribbon
3. Select **ALL CATEGORIES** to open the **COLOR CATEGORIES** dialog.
4. Tick all the categories you wish to apply to the item
5. Click **OK** to apply the multiple categories

To Remove A Category

You may wish to remove a category from an item that no longer is suited to it. Or remove the item from any category you have previously applied to it.

➢ **To Remove A Category.**

MOUSE

1. Select the appointment to remove category from
2. Click the **CATEGORIZE** button on the ribbon and select the category you wish to remove.
3. The category and colour or colour bar should be removed.
4. Repeat the step for multiple categories.

OR

5. Select the appointment to remove categories from
6. Click the **CATEGORIZE** button on the ribbon and select the **ALL CATEGORIES** choice to open the **COLOR CATEGORIES** dialog
7. Untick the categories you do not wish the item to be a part of
8. Click **OK**.

Views

Outlook 2010 allows the Calendar folder display to be altered using different views. You may see the calendar in its default view. Whether by day/week/month. You may also see it as a list (like emails) to locate a specific appointment. You may even filter the appointments out to see just meetings or events. You may even filter out your appointments to show specific categories of appointments.

Simple View Changes

These simple view options are on the ribbon and require just a click to apply them.

➢ **To Change The Calendar View:**

MOUSE

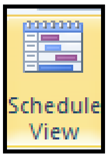
1. In the Calendar folder, choose **VIEW** ribbon, **ARRANGEMENT** group
2. Choose a view required day/week/work week/month

Schedule View

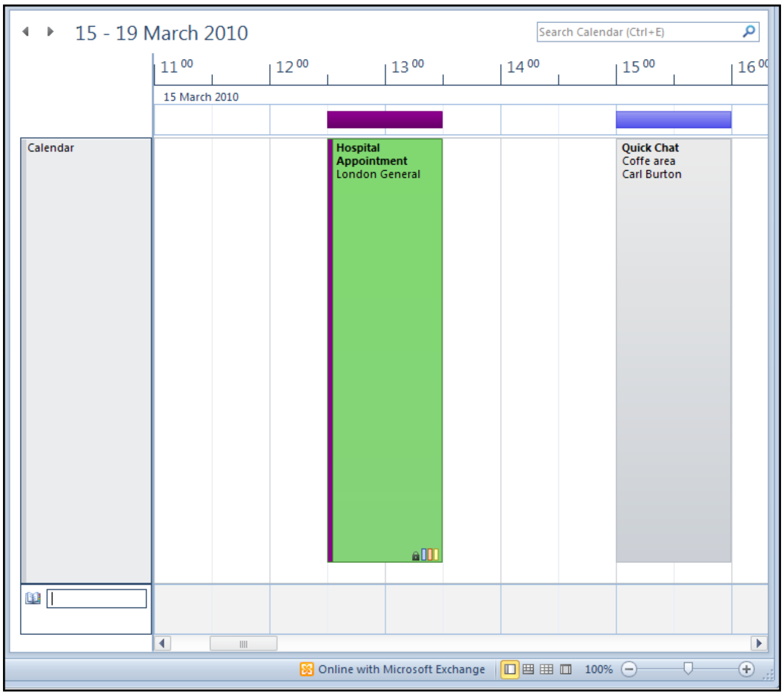
Schedule view is a simple view change and is new in 2010

➢ **To Change To Schedule View**

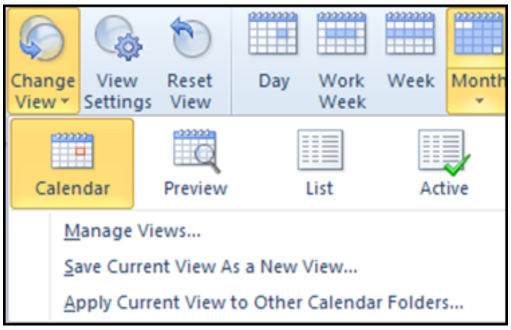
MOUSE



1. In the Calendar folder, choose **VIEW** ribbon, **ARRANGEMENT** group
2. Choose **SCHEDULE** view.
3. Schedule view allows you to see your appointments and meetings on a timeline basis to allow you to follow what you will do that day, week etc you may add several calendars and compare the schedules together (we will cover this further in sharing calendars.)


15 - 19 March 2010
Search Calendar (Ctrl+E)
11 00
12 00
13 00
14 00
15 00
15 March 2010
Calendar
Hospital Appointment
London General
Quick Chat
Coffe area
Carl Burton
Online with Microsoft Exchange
100%

Other Views

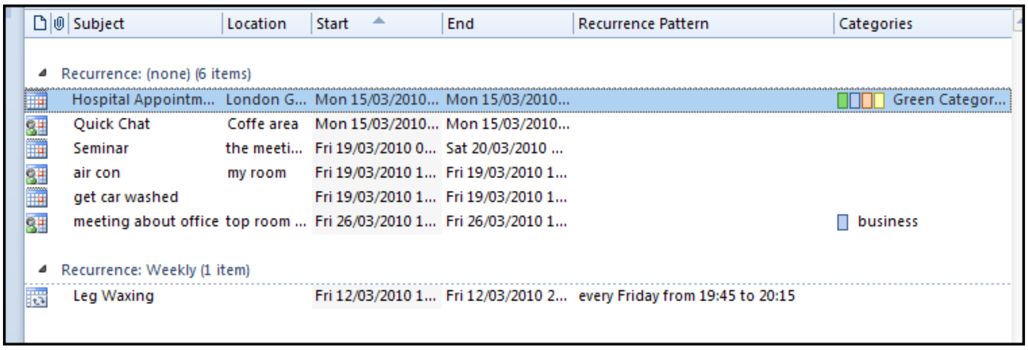


As mentioned your calendar appointments may be viewed in other ways

➤ **To Change Views**

MOUSE

1. In the calendar folder on the **VIEW** ribbon
2. Click on the **CHANGE VIEW** button
3. While in day/week/month view Clicking on the **PREVIEW** button takes you to day view.
4. Selecting **LIST** allows you to see your ALL the items in a list like emails.

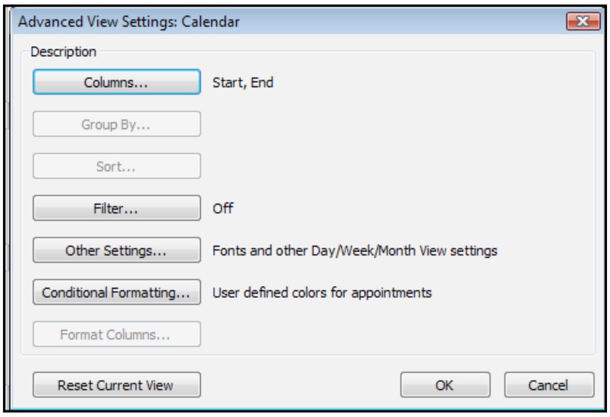


5. Selecting **ACTIVE** allows the same view but filters on future active items within your calendar if in day/week/month view items will simply seem to disappear from your calendar.
6. Click on the calendar view to return all to normal

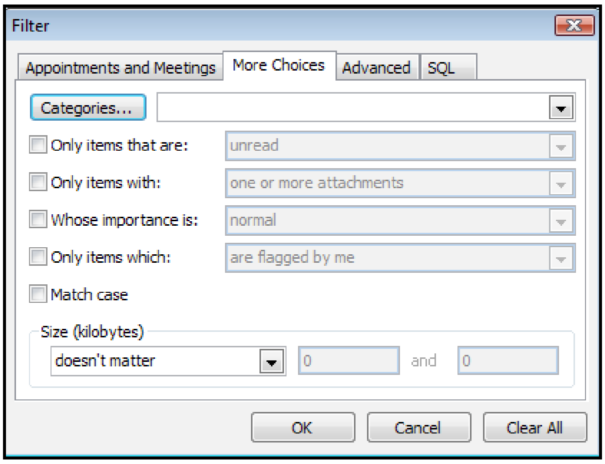
Filtering A View (By Category)

➤ **To Filter Your Appointments**

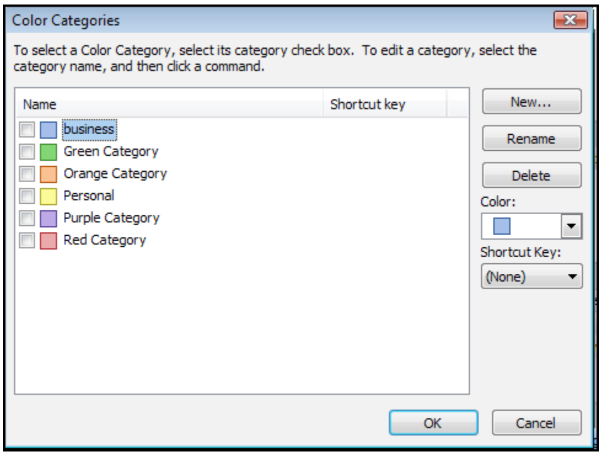
MOUSE



1. Ensure the view is how you want it to appear such as day/week/month.
2. Click on the **VIEW** ribbon, **CURRENT VIEW** group, **VIEW SETTINGS**.
3. The **ADVANCED VIEW SETTINGS** dialog will appear
4. Click on the filter button the filter dialog will appear.



5. You will see four tabs which allow you to set different options for your filter we will apply a filter for categories.
6. Go to the **MORE CHOICES** tab
7. Click on the **CATEGORIES** button to select the catgories to filter by, the **COLOR CATEGORIES** dialog will appear.
8. Select which categories of item you wish to appear in your calendar by ticking the appropriate boxes.
9. Click **OK** the category names will appear in the categories box in the **FILTER** dialog.



10. If you are happy with your selection click **OK** to apply the filter to the **VIEW SETTINGS.**
11. Click **OK** on the **VIEW SETTINGS** dialog to apply the filter to your calendar.
12. The only appointments, meetings and events that should now be visible are the ones you selected in the filter.
13. You may edit the settings at any time to add or remove categories from the filter.

- *You may also use other options from the view settings dilaog to further change the view of your calendar. You may also wish to filter based on other things besides categories.*
- *These options similarly apply to tasks, notes, emails and contacts*

➢ **To Reset The View**

MOUSE

1. At any time you may wish to remove any changes to the view by clicking the reset view button in the current view group on the ribbon to restore the default view settings.

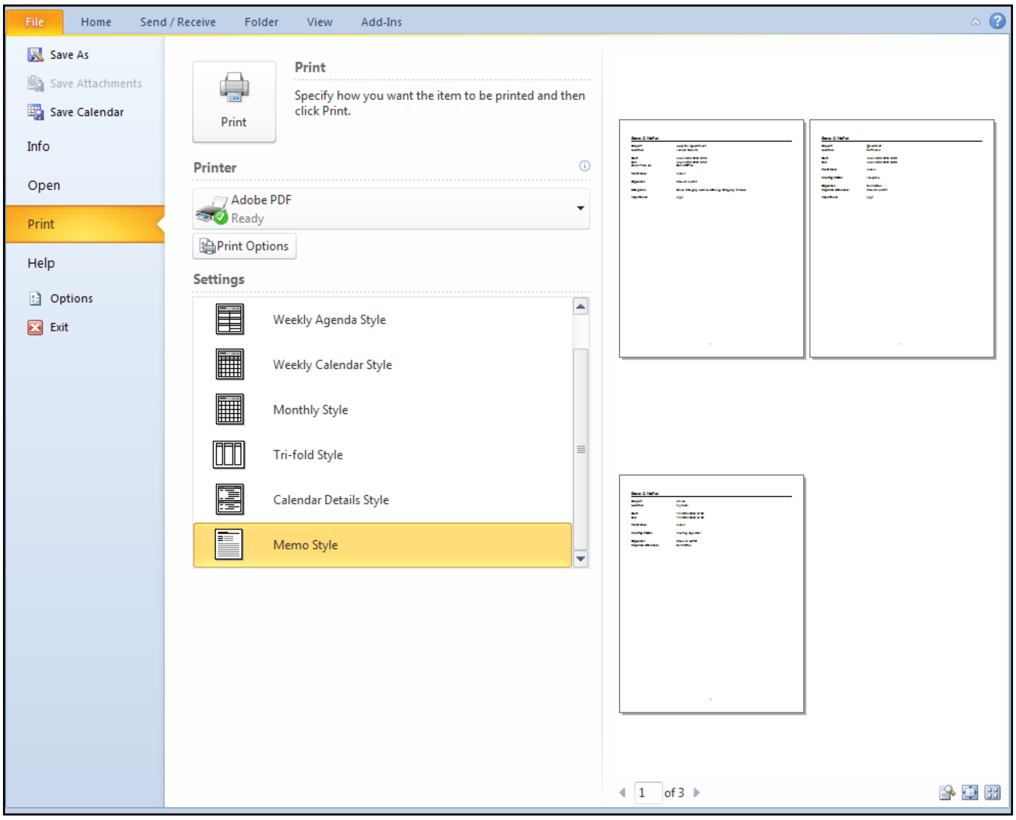
Printing the Calendar

The user can print Calendar items, e.g. today's appointments and meetings, or the view of everything seen on screen can be printed.

➢ **To Print A Calendar Item:**

MENU

1. In the Calendar, select the item(s) to print.(selecting multiple items use **SHIFT** or **CTRL** as you select the items)
2. Choose **FILE**, **PRINT**.



3. In the **SETTINGS** section, choose **MEMO STYLE**.
4. Choose **PRINT**.

➢ <u>**To Print A View:**</u>

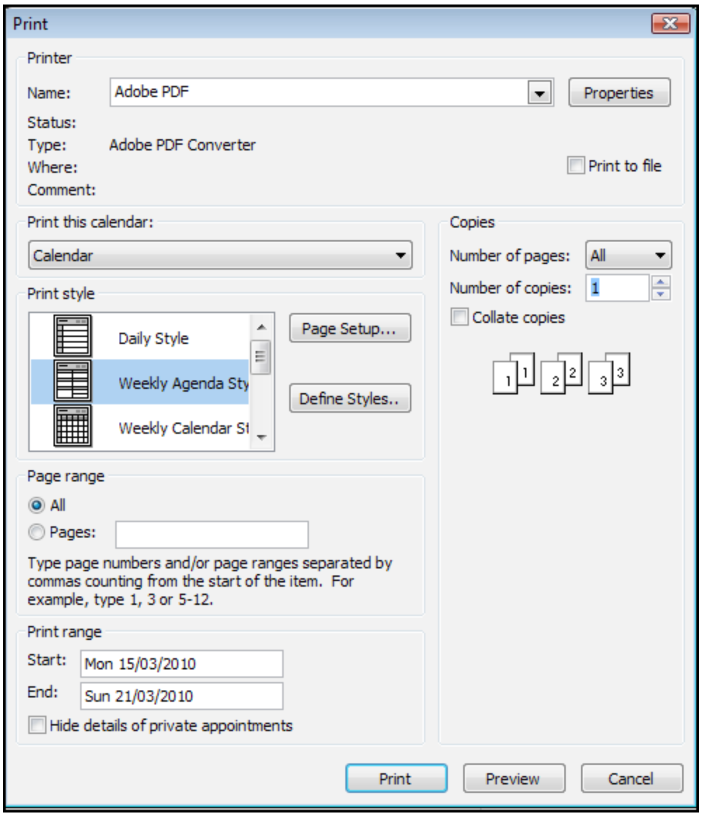
<u>**MENU**</u>

1. In the Calendar folder, choose File, Print.
2. In the Settings section, choose Daily Style, Choose Weekly Style, Choose Monthly Style, Choose Tri-fold style. (The Tri-fold style can be printed for use as a paper day planner).
3. To print a set number of days,Click the Print options button a dialog will open with further choices
4. In the Start box, choose the first day to print.
5. In the End box, choose the last day to print.

- *If the user tries to print a range of days that is less than the range of days in the selected print style, the range of days in the print style will print, e.g. if four days is selected to print in the Weekly print style, the week surrounding the four days prints.*

6. You can see from the **PRINT** dialog you may select a different Calendar, any number of pages, date range, number of copies, which printer to print to
7. Right at the bottom you have the ability not to print any details of any private appointments you may have

8. Choose the print options required.



9. Choose **PRINT**.

Sharing Calendars

A useful tool within outlook is the ability to share your calender with others within your organisation such as the team of people you work with so they can compare schedules, set up meetings at appropriate times enter or edit business appointments for you when you are busy we will look at some of the advantages of this facility and some of the new features that make it easier in 2010

To share a calendar you must first decide who you are going to share it with and what level of permission you would like them to have within your calendar such as whether they would be allowed to enter or edit your appointments or just view it.

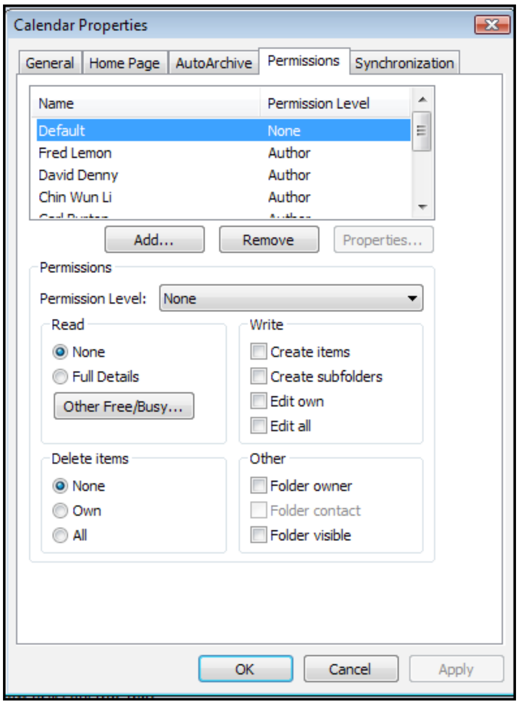
They must also give YOU permissions to access their calendar as well.

Assuming your colleagues have given YOU permissions to access their calendars you will now need to give THEM permissions. The we will look at accessing their calendars setting up groups of calenders, merging them checking schedules etc.

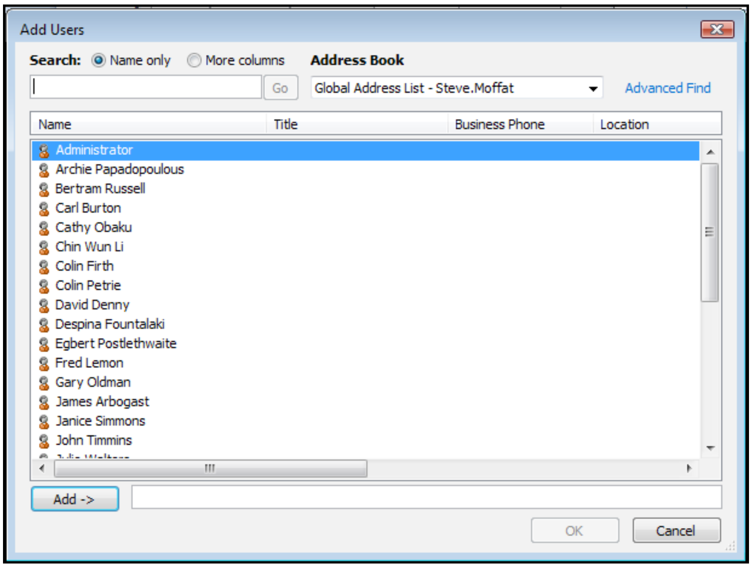
Setting Permissions

➢ <u>**To Set Permissions On A Calendar**</u>

<u>**MOUSE**</u>



1. Go to the calendar
2. On the **HOME** ribbon in the **SHARE** group click on **CALENDAR PERMISSIONS**.
3. A dialog will appear showing the permissions for the calendar.
4. The default permissions should be none. (for calendar security this should be left unchanged and NEVER removed but if everyone in your organisation should be be able to see your calendaer then by all means change the permissions to the minimum acceptable to the organisation)
5. To add your team members and give them permissions click on the **ADD** button a dialog will open.



6. Just like an address book the dialog allows you to select your team members use the **CTRL** key to select multiple members and click on the add button so they appear in the box at the bottom.
7. When all members have been selected that you wish to assign permission to then click **OK**.
8. All members will appear as in the top of the permissions dialog box
9. Select from the drop down box under the **ADD/ REMOVE** buttons a permission level.

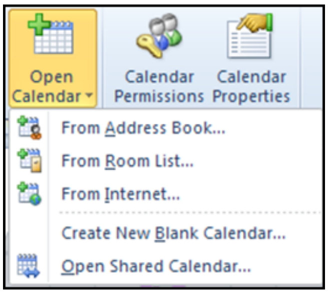
- *Do not assign OWNER permission levels to your calendar unless you are happy with the fact that this removes ANY privacy options and allows the person to assign permissions to others*

10. In the lower part of the dialog you may fine tune what you would wish them to do within your calendar.
11. Click **OK** when finished to apply permissions to your team members

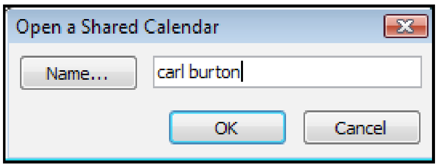
Accessing Shared Calendars

➢ **To Access Shared Calendars**

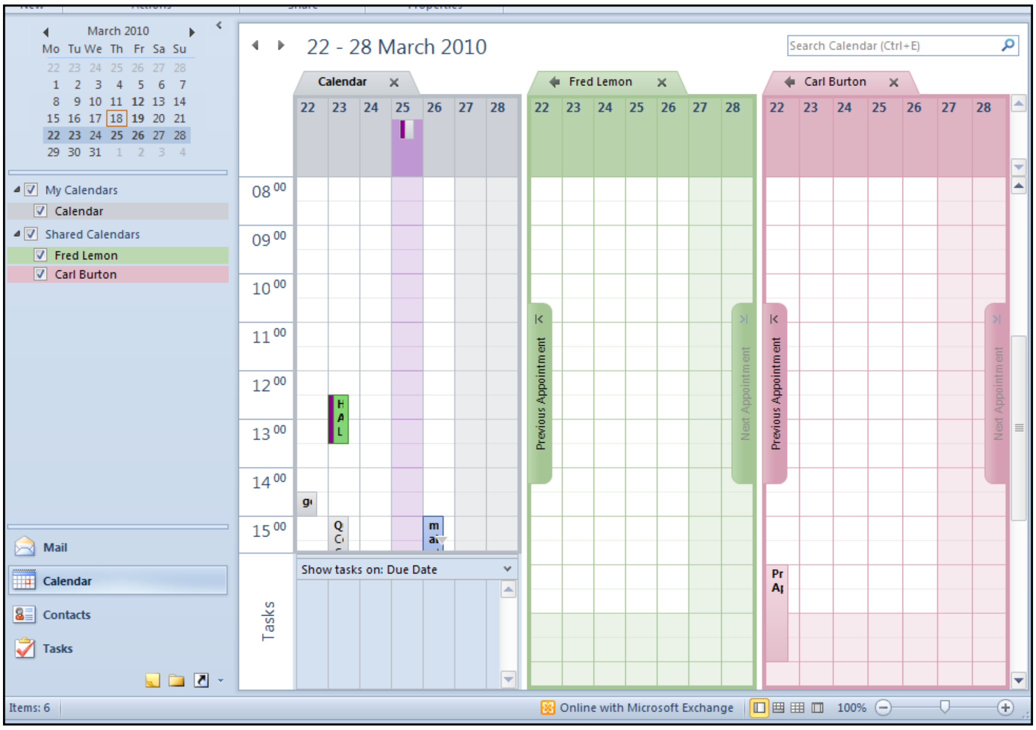
MOUSE



1. On the Folder ribbon in the share group click on open calendar from the list select Open shared calendar.
2. A dialog will appear enter the users name that you wish to open the calender from and click on ok, or click on the name button and select it from the address list.

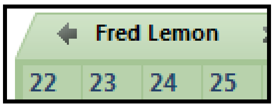


3. The calendar will appear next to yours
4. Repeat the steps for any other calendars you wish to access.


March 2010
22 - 28 March 2010
Search Calendar (Ctrl+E)
Calendar
Fred Lemon
Carl Burton
My Calendars
Shared Calendars
Previous Appointment
Next Appointment
Show tasks on: Due Date
Tasks
Mail
Contacts
Items: 6
Online with Microsoft Exchange
100%

Overlaying Shared Calendars

Merging the calendars allows to see your appointments overlayed on each others calendars.



➤ **To Overlay Calendars**

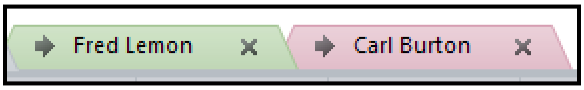
MOUSE

1. To the left of each of the names at the top of the calendars you will see an arrow
2. Click the arrow to merge the calendar with yours.

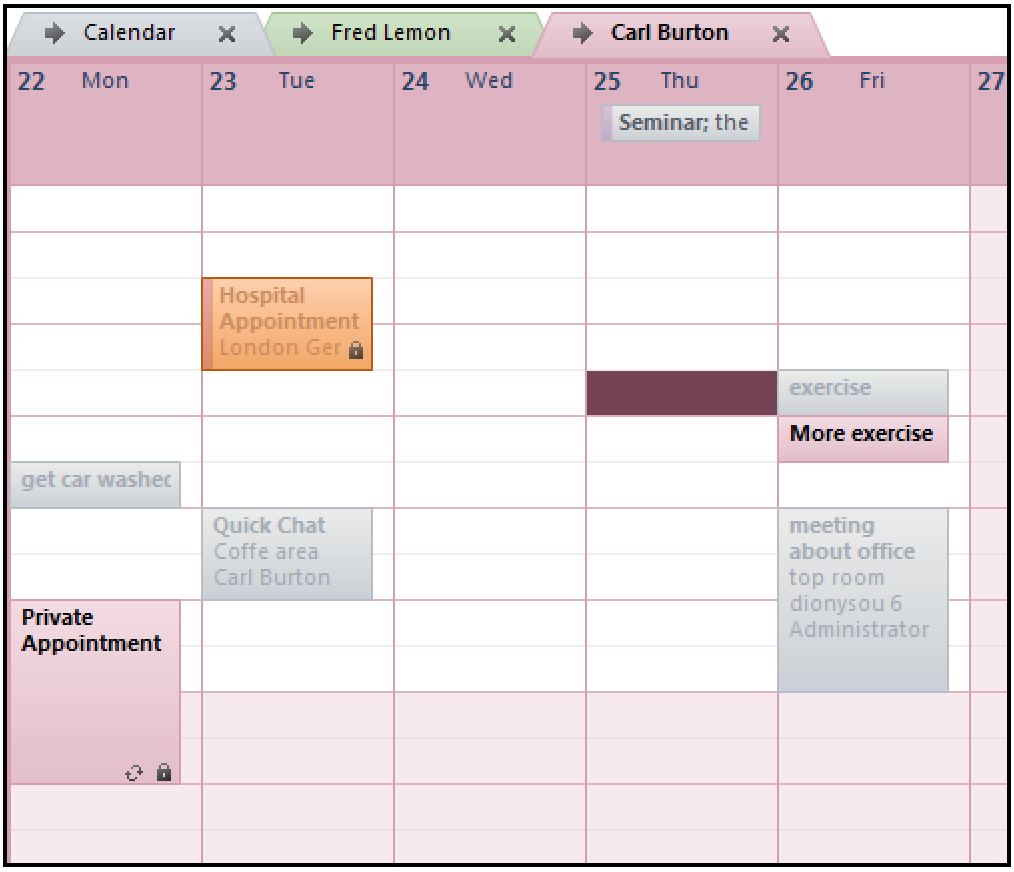
➤ **To Stop Overlay**

MOUSE

1. To the right of each of the names at the top of the overlayed calendars you will see an arrow

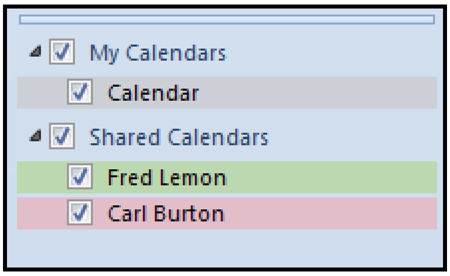


2. Click the arrow to unmerge the calendar from yours.



- *When the calendars are overlayed the calenders that are underneath the top one will have their appointments dimmed only the topmost calendar will have its appointments in normal text style.*
- *Any appointments entered when merged will be entered into the topmost calendar so ensure you have the right calendar topmost by clicking on the tab of that user.*

Closing And Reopening Shared Calendars



When you have opened a calendar for the first time it will appear in the navigation pane on the left hand side. With a tick next to it you may not wish it to be visible all the time and this is the method of closing them when you do not wish to see them for awhile

- **To Close A Shared Calendar**

MOUSE

1. Untick the calendar in the navigation pane
2. The calendar will close

- **Toreopen A Shared Calendar**

MOUSE

1. Tick the calendar in the navigation pane that you wish to view
2. The calendar will open

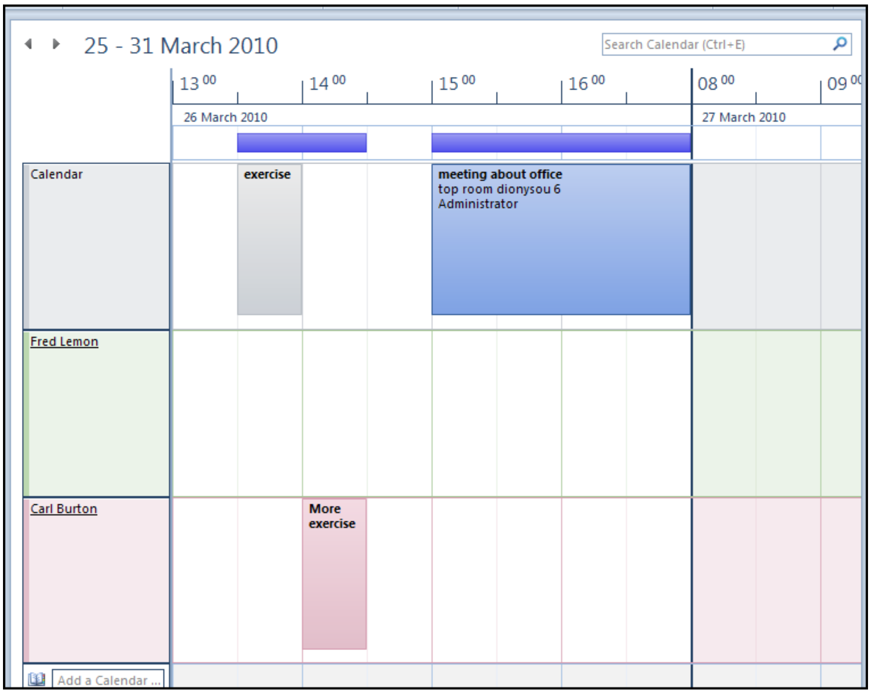
Schedule View

When you have shared calendars open you may find the schedule view of use.

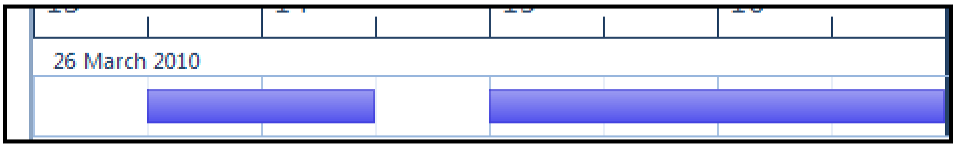
- **To Use Schedule View**

MOUSE

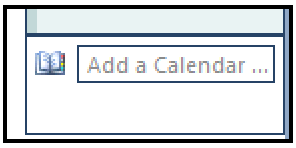
1. In the arrange group on the home ribbon click schedule view
2. All calendars that are open will appear above each other on a timeline.
3. Use the today button to bring you to today or the next seven days button to allow you to scroll over the week. Scroll left or right to see more of the day or week



4. Use the arrow buttons in the top left next to the date to view future or past weeks.
5. The schedule view allows you to quickly see times that all in the group are free for meetings etc. the busy times for **ALL** are shown in the bar at the top of the schedule in blue.



6. This quickly allows you to identify free time for all



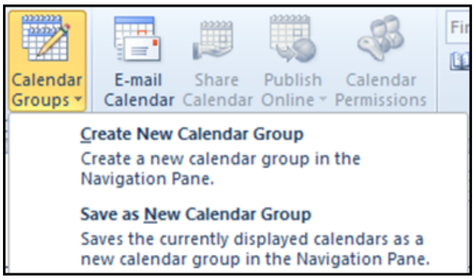
7. Quickly add another calendar to your schedule by typing the name of the individual in the box at the bottom left of the calendar and pressing return.
8. Schedule view wrks very well the more calendars that are added so if there are 10 people in your team it allows you to see when they are all free.

Calendar Groups

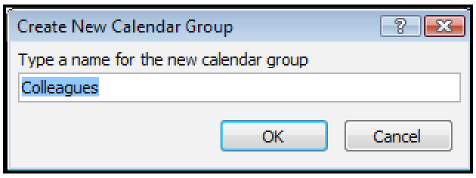
Calendar groups replace the old group schedules from previous versions of Outlook and are quite easy to set up. If you usually work with several groups of people you may quickly wish to see that group within your calendar as opposed to spending time ticking and unticking boxes to add and remove them.

➢ **To Create A Calendar Group**

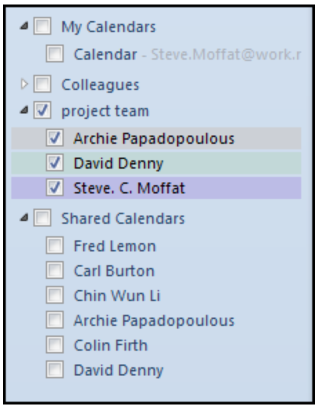
MOUSE



1. Open up all the calendars you wish to create a group from using the methods we have previously discussed.
2. On the **HOME** ribbon in the **MANAGE CALENDARS** group click on the **CALENDAR GROUPS** button.
3. From the options select **SAVE AS NEW CALENDAR GROUP**



4. You are prompted for a name for the group. Enter a name and click **OK**
5. A group is created and appears in the **NAVIGATION PANE**.



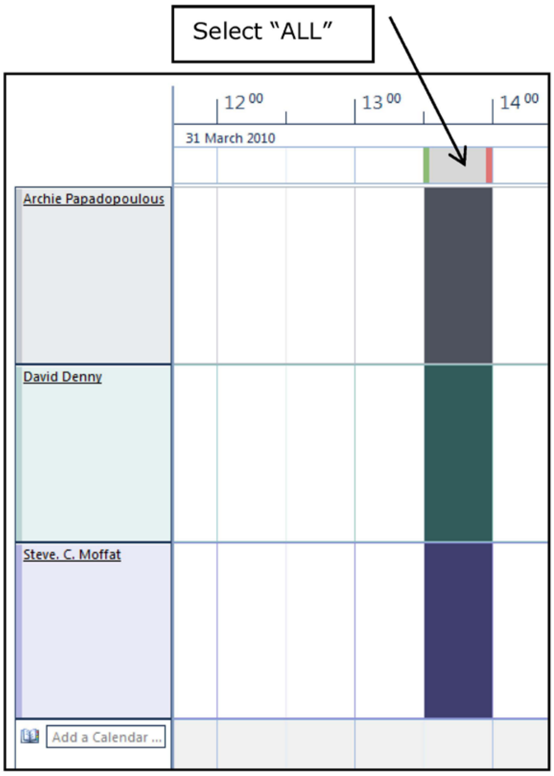
6. You may create many groups and a calendar can appear in many groups as they are merely comparisons to other calendars.
7. By ticking just the group name all the members of that group appear in your calendar.
8. You are still able to untick specific individuals for any reason without affecting the group.

Create Meeting Using Group Calendars

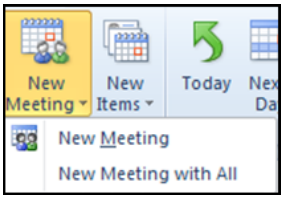
Another use of groups is that it is easy to create a meeting with them

➢ <u>To Create A Group Meeting</u>

MOUSE



1. Create a group as previously discussed or select a group.
2. Using schedule view locate a time and day that is suitable for all by clicking on the "ALL" part of the schedule.
3. This should select a column of time across all calendars. (above)
4. In the **NEW** group click on new meeting and from the menu select **NEW MEETING WITH ALL**.



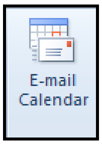
5. A new meeting window opens up with the time and date information filled in just enter the subject and location.
6. Categorize and set status, reminder etc as needed.
7. Send meeting request.

Emailing A Calendar

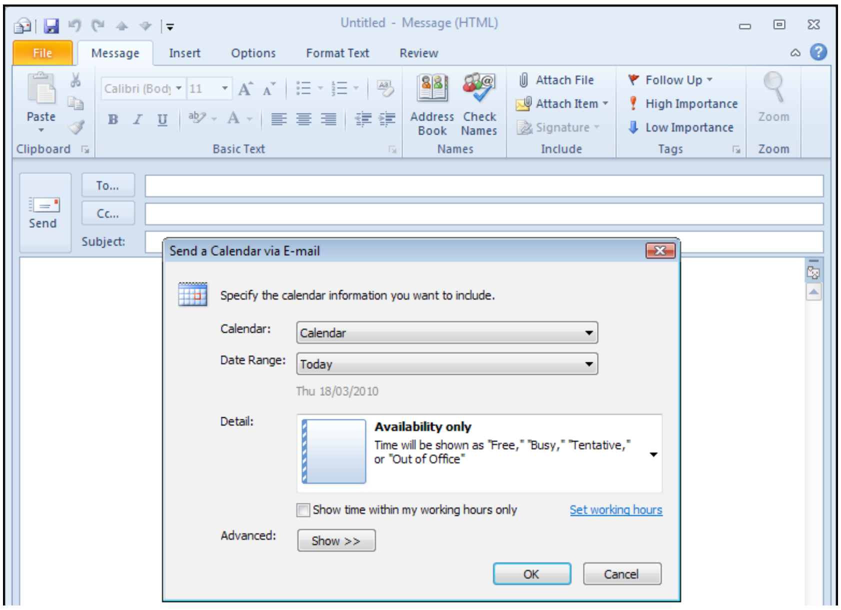
E-mailing a calendar becomes very useful when you need to inform someone of your schedule that does not have access to your calendar, such as people outside your organisation. You are able to send them from one day to a month ahead of your calendar and either give no calendar details or full information.

➢ **<u>To Email A Calendar</u>**

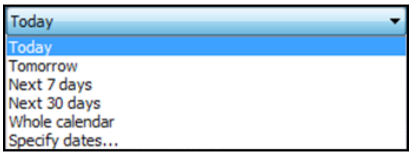
<u>MOUSE</u>



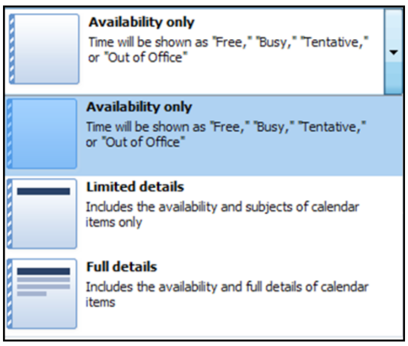
1. Show just your calendar unticking any others on the navigation pane
2. On the **HOME** ribbon in the **SHARE** group click the**EMAIL** calendar button. An email with a dialog box appears



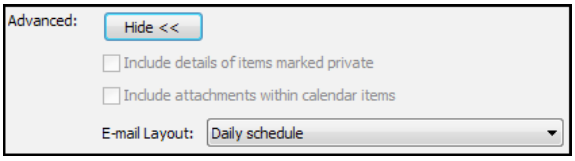
3. Ensure in the calendar drop down that the word Calendar is selected (your calendar) any other calenders available to email will appear in this drop down box.



4. Choose a date range from the date range drop down box
5. In the detail box select the level of detail to show from your Calendar a preview will be shown upon selection.



6. Select whether to only show information from your set working hours by checking the tick box or not.
7. For further options click the advanced button.



8. Make any selections you feel are justified then click **OK**.
9. Address and send the email as you normally would

More Appearance Options

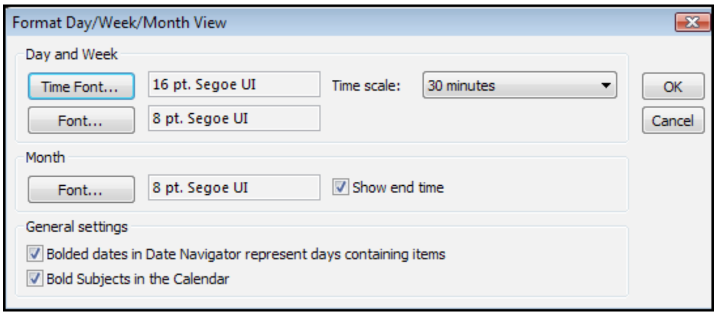
The user can customise the way that the Calendar looks, e.g. national and international holidays can quickly be added to the Calendar. Colour scheme, time scale, fonts etc

Font Style

- **<u>Formatting The Font Styles:</u>**

<u>MENU</u>

1. In the Calendar folder, choose **VIEW** ribbon, **CURRENT VIEW** group, **VIEW SETTINGS**.
2. In the dialog select**OTHER SETTINGS** Choose:



- **BOLDED DATES IN DATE NAVIGATOR REPRESENT DAYS CONTAINING ITEMS.**(This allows for dates to appear in bold when there are appointments on those dates)
- Set the font for the time in day and week view
- Set the font for the subject
- Set the font for the items in month view
- Set the timescale

3. Choose **OK**.
4. Click OK on the advanced view settings dialog to apply the format options

Calendar Colour

This is especially useful when using multiple calendars to enable the largest contrast between calendars in a group

➢ **To Change The Calendar Colour**

MOUSE

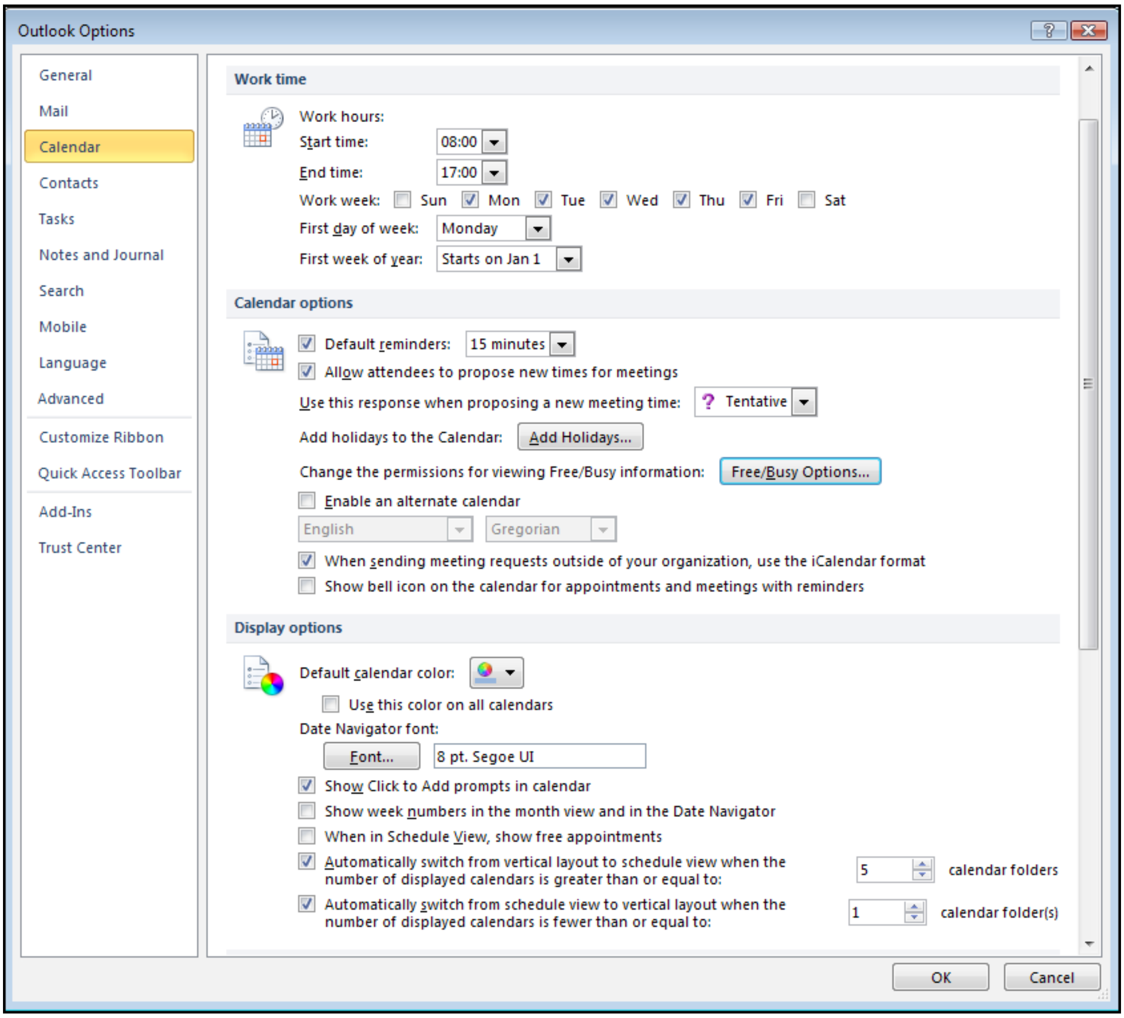
1. On the **VIEW** ribbon in the **COLOUR** group click on the **COLOUR** button.
2. Select a colour from the pallette.
3. Repeat if colour is unsuitable.
4. Colour applies to the date area of the calendar in day/week/month view and washed colour to all none working time.

Showing Week Numbers

➢ **To Show Week Numbers In The Date Navigator:**

MOUSE

1. Go to **FILE** tab, **OPTIONS**.
2. Choose Calendar,



3. In the **DISPLAY OPTIONS** section tick the box **SHOW WEEK NUMBERS IN THE MONTH VIEW AND DATE NAVIGATOR**.
4. Choose **OK**.

The weeks of the year are assigned a number from 1 to 52, called week numbers. These numbers appear on the left side of the Date Navigator.

Adding Holidays

Using the options dialog you have the option to add not only your country's holidays but the holidays from any country in the world or religeous holidays from any religeon. These will appear as events within your calendar and will show as free time.

➢ **To Add World Holidays To The Calendar:**

MOUSE

1. Go to **FILE** tab, **OPTIONS**.
2. Choose Calendar,
3. In the **CALENDAR OPTIONS** sectionChoose **ADD HOLIDAYS**.
4. Select the countries with the holidays to add to the Calendar.
5. Choose **OK**. The holidays for the chosen country are now imported into the Calendar.
6. Choose **OK**.to close options dialog.

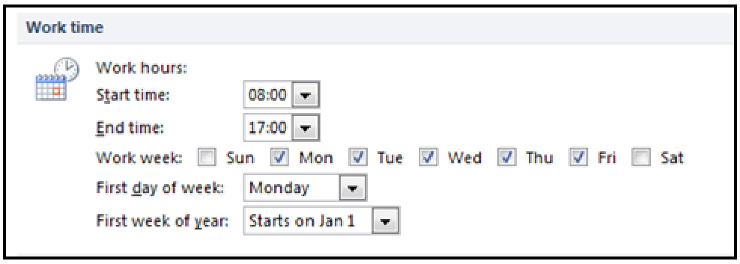
Setting Working Time In Calendar

Not everyone works 9 to 5 and so outlook allows you the opportunity to set your working time so it is easy to see at a glance that appointments are within your working hours. Also the option only to email; appointments within working time protects your personal appointments from being published.

➢ **To Set Work Time:**

MOUSE

1. Go to **FILE** tab, **OPTIONS**.
2. Choose Calendar,



3. In the work time section select your start and end time
4. Which days are your work days
5. Which day you would class as the first day of your week
6. Which day is the first day of your year (for week numbers)
7. Click ok to close the options dialog and apply
8. Your working time appears in white within your calendar the calendar colour appears in all other areas (non working time a washed colour)

To see Section 9-13 download

Outlook 2010: Part III