

Microsoft Outlook 2013

Lesson 13

Managing Notes and Journal Entries

Objectives

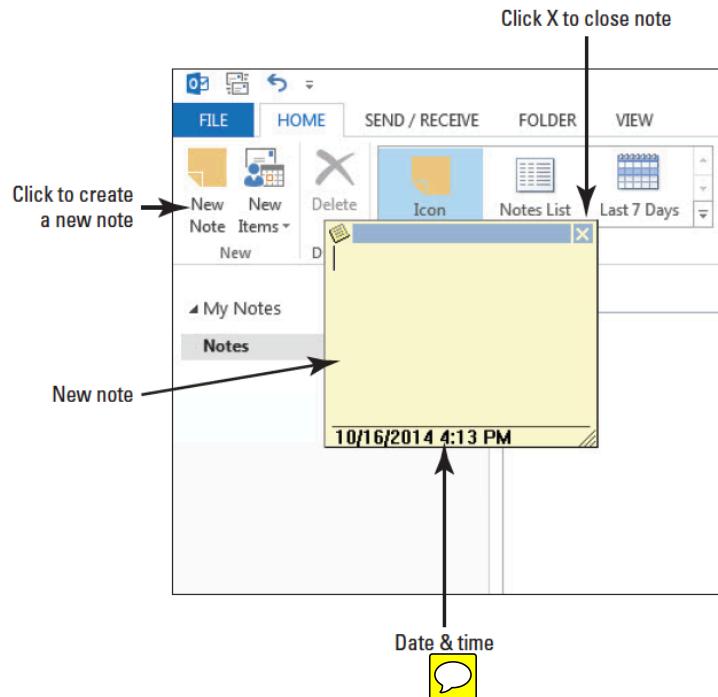
| Skills | Exam Objective | Objective Number |
|--------------------------|-------------------------|------------------|
| Working with Notes | Create and manage notes | 3.4.2 |
| Working with the Journal | Create journal entries | 3.4.4 |

Step by Step: Create a New Note

- **GET READY. LAUNCH** Outlook 2013 if it is not already running.
 1. Click the  icon in the Navigation bar to open the list of additional features.
 2. Select **Navigation Options**. The Navigation Options dialog box is displayed.
 3. In the **Maximum number of visible items** box, select the number **6**.
 4. Click **OK**.
 5. Click **Notes** in the Navigation bar to open the Notes feature.

Step by Step: Create a New Note

6. Click the **New Note** button on the HOME tab of the Ribbon. A blank sticky note appears in the default yellow color. Below the sticky note is the current date and time, as shown at right.

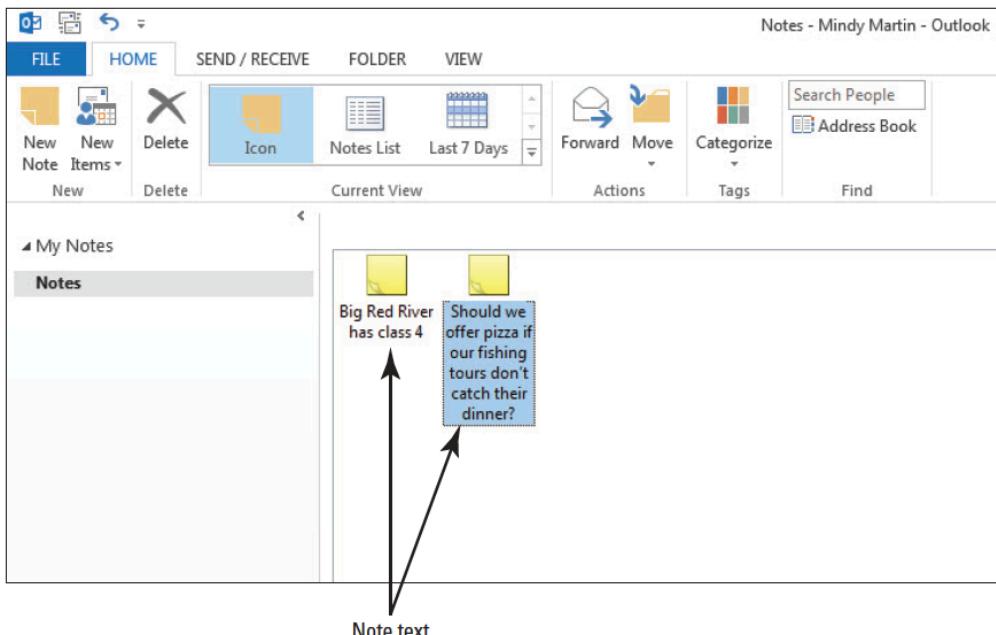


Step by Step: Create a New Note

7. Key **Big Red River has class 4 rapids. Possible whitewater rafting tours.**
8. Click the **Close** button (the X at the ~~top~~-right corner of the note) to close the note. Your note appears as a sticky note with the note's text below it.
9. Click the **New Note** button on the Ribbon.
10. Key **Should we offer pizza if our fishing tours don't catch their dinner?**

Step by Step: Create a New Note

11. Click the **Close** button (the X at the ~~top~~-right corner of the note) to close the note. Notice that only the first two lines of text are displayed for the ~~non-~~selected note. Your Notes folder should appear as shown below.

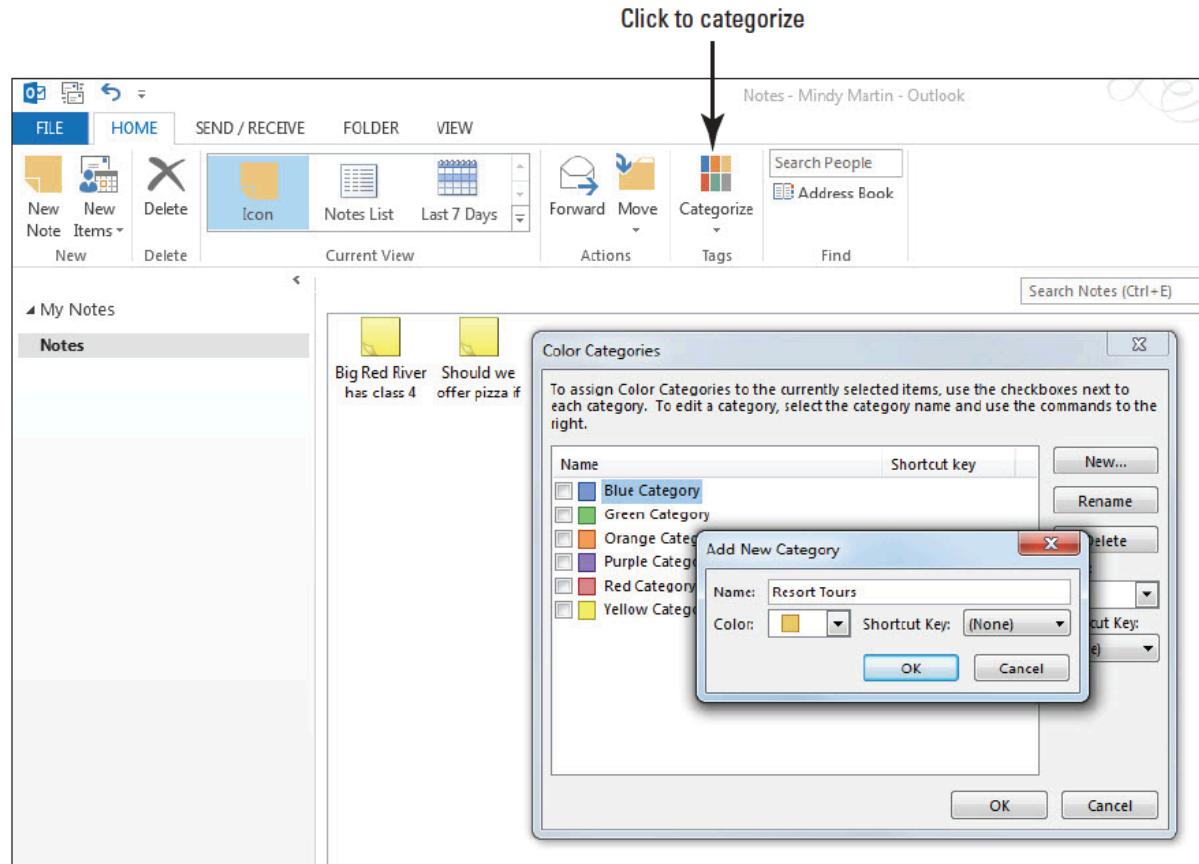


Step by Step: Categorize Notes

- **GET READY. LAUNCH** Outlook 2013 if it is not already running and be sure to complete the previous exercise.
 1. If necessary, click **Notes** in the Navigation bar to open the Notes feature.
 2. Click the **Big Red River** note to select it.
 3. On the HOME tab, click **Categorize**.
 4. Select the **All Categories** option to create a new category. The Color Categories dialog box is displayed.
 5. Click the **New** button. The Add New Category dialog box is displayed.

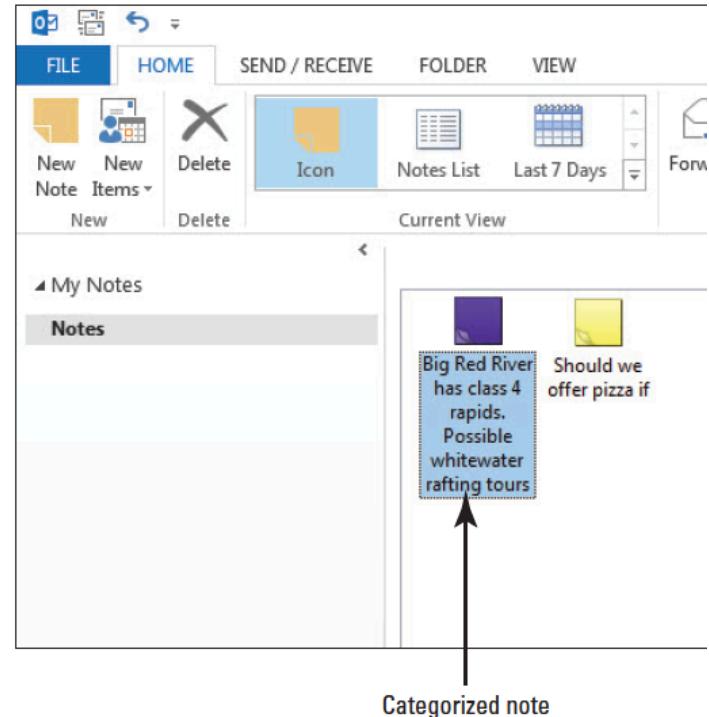
Step by Step: Categorize Notes

6. In the **Name** field, key **Resort Tours**, as shown below.



Step by Step: Categorize Notes

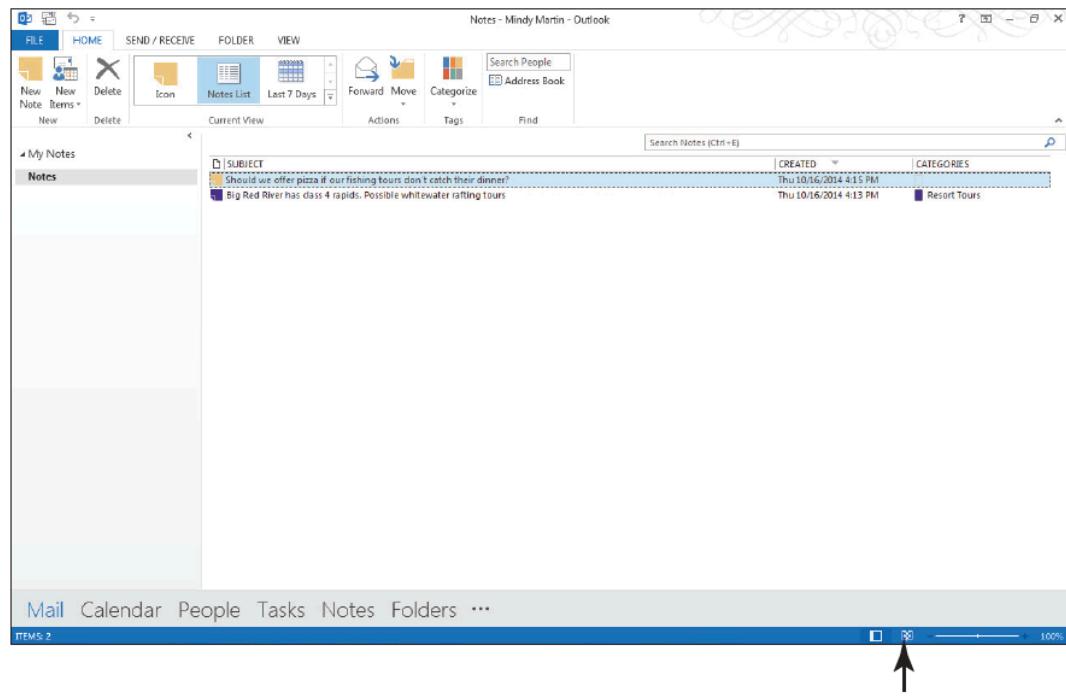
7. Click the **Color** drop arrow to open the standard color palette.
 8. Select **Dark Purple**.
 9. Click **OK** twice to apply the color to the new Resort Tours category, as shown at right.
- **PAUSE. LEAVE** Outlook 2013 open to use in the next exercise.



Step by Step: Explore Notes Views

- **GET READY. LAUNCH**
Outlook 2013 if it is
not already running.

1. If necessary, click **Notes** in the Navigation bar to open the Notes feature.
2. In the Current View group on the HOME tab, click **Notes List**.
The notes are now presented as a vertical list with the uncategorized notes at the top, as shown above.

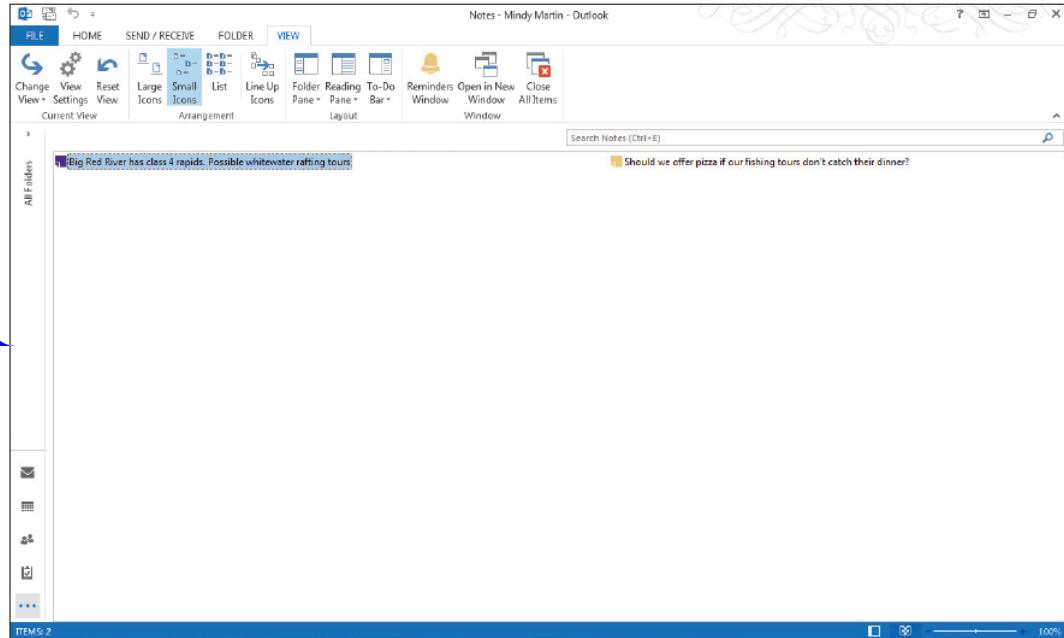


Step by Step: Explore Notes Views

3. In the Current View group, click **Last 7 Days**. Notice that the view is still in a vertical list. Had there been notes more than **7** days old, they would have dropped off the list.
4. In the Current View group, click **Icon**.
5. Click the **VIEW** tab.
6. Select the **Big Red River** note and drag it to the middle of the screen. Outlook 2013 allows you to stick the notes where you need them.

Step by Step: Explore Notes Views

7. On the Status bar, click the **Reading** icon. The Folders Pane collapses.
8. In the Arrangement group, click the **Small Icons** button. The notes spread out across the screen in a balanced pattern. Notice that the Note text is also displayed, as shown above.

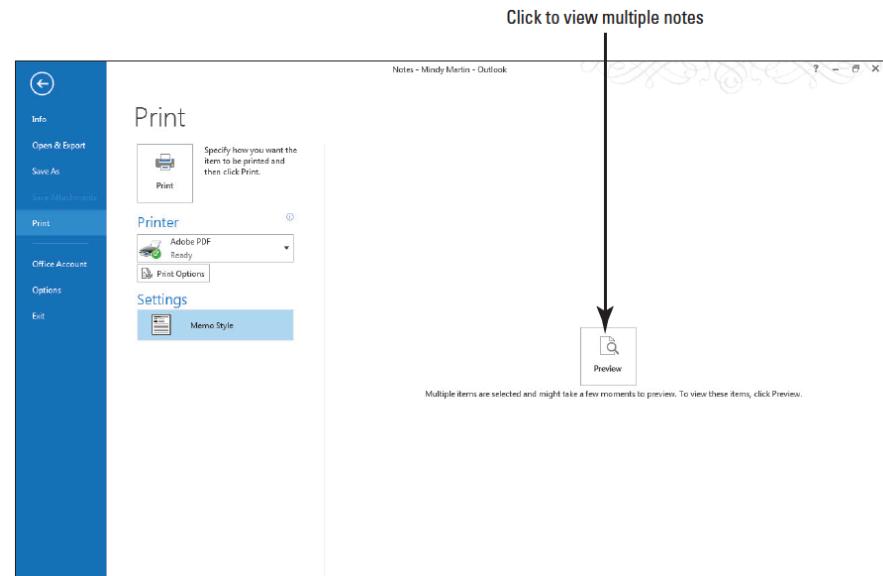


Step by Step: Explore Notes Views

9. On the Status bar, click the **Normal** icon to return to the standard view of the Notes folder.
 10. Select **Large Icons** on the VIEW tab to return to the Notes View with large icons.
- **PAUSE. LEAVE** Outlook 2013 open to use in the next exercise.

Step by Step: Forward and Print Notes

- **GET READY. LAUNCH** Outlook 2013 if it is not already running and be sure to complete the previous exercise.
 1. If necessary, click **Notes** in the Navigation bar to open the Notes feature.
 2. Select the **Big Red River** and the **Pizza** notes.
 3. Click **File** and click **Print**, as shown at right.
 4. In the Preview pane, click the **Preview** button.



Step by Step: Forward and Print Notes

5. Click the **Next Page** button to view both notes when the Preview becomes available.
6. If your instructor requests, click **Print**. Turn in both Notes to your instructor.
7. Click the **Back arrow** to return to the Notes feature, if necessary.
8. Click the **Big Red River** note to select it.

Step by Step: Forward and Print Notes

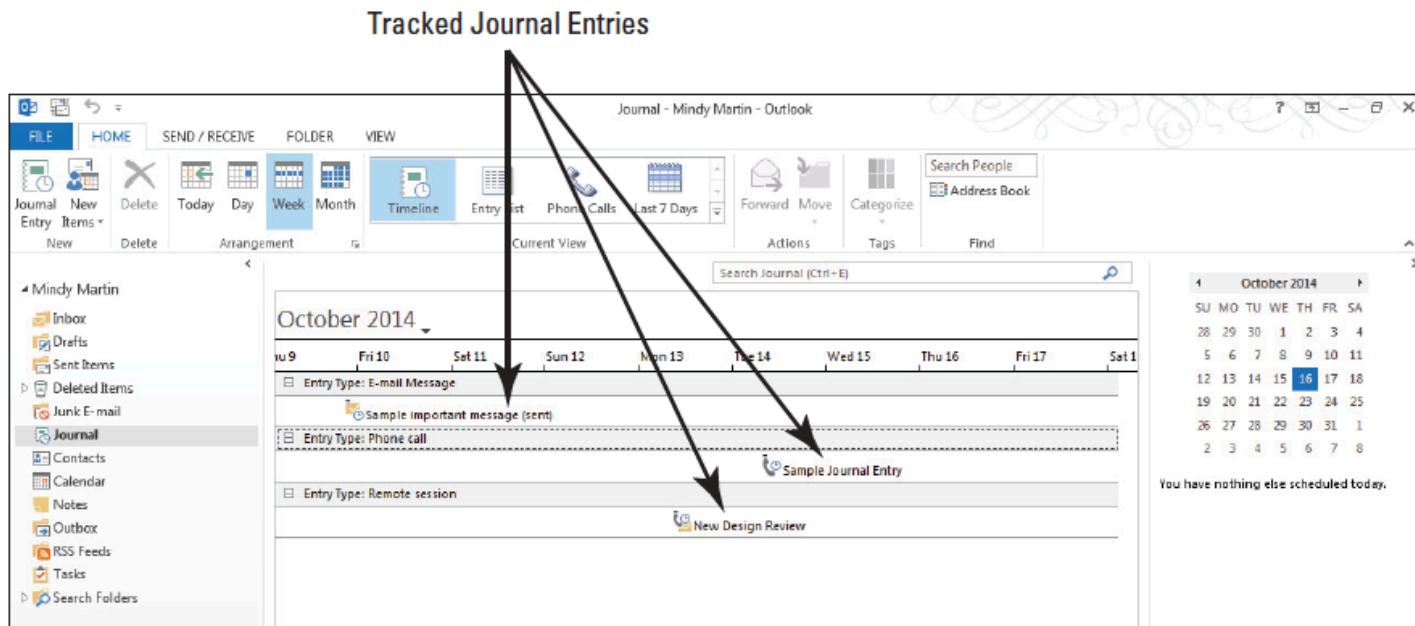
9. On the HOME tab, click **Forward** in the Actions group. A new Message window appears with the note text in the Subject field and the note attached.
 10. In the message area, key **Here are some notes to consider at next week's Tour Updates meeting.**
 11. Address the message to yourself and click **Send**.
- **PAUSE. LEAVE** Outlook 2013 open to use in the next exercise.

Step by Step: Create a Journal Entry from an Existing Outlook Item

1. If necessary, click **Mail** in the Navigation bar to open the Inbox.
2. Select **a** message that you sent to yourself.
3. Click **Move** in the Move group and select **Other Folder**.
4. Select **Journal** from the available options and click **OK**. A Journal Entry window opens with the email item included as an attachment.
5. In the Duration box, key **5 minutes** in the Journal Entry window.
6. Click **Save & Close** in the Journal Entry window.

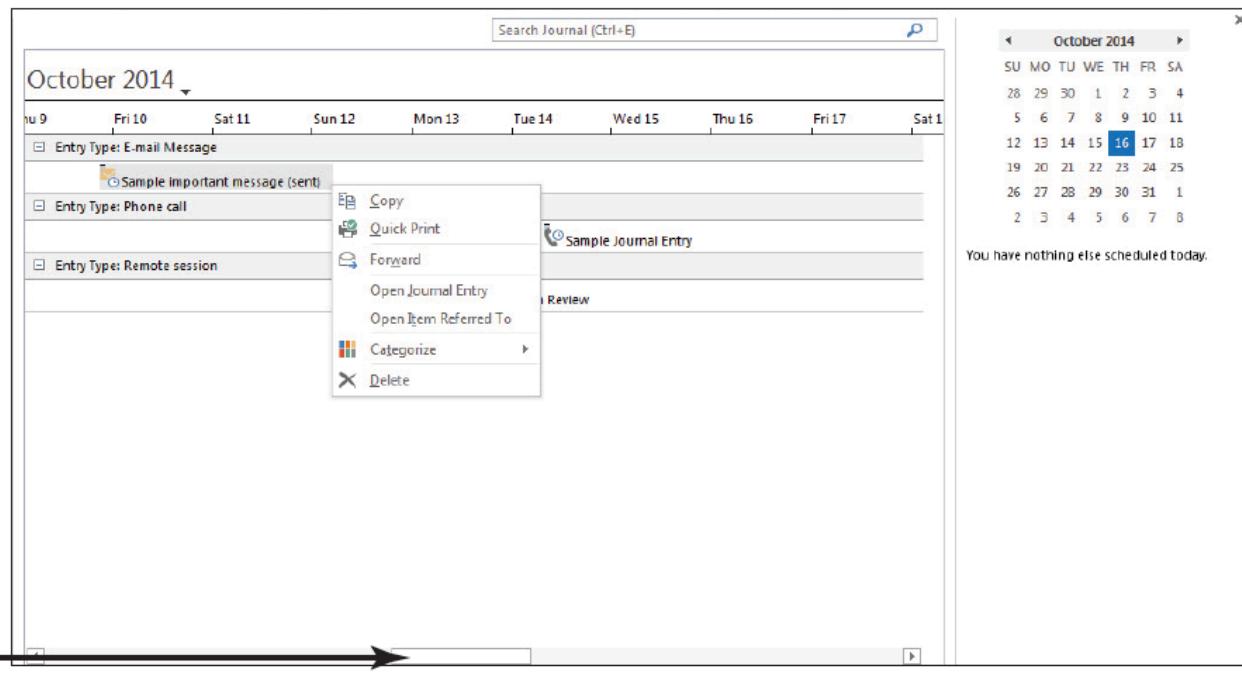
Step by Step: Create a Journal Entry from an Existing Outlook Item

7. If necessary, click **Folders** in the Navigation bar to expand the Folders List.
8. Click **Journal** in the Folders List to open the Journal with the default Timeline view, as shown below.



Step by Step: Create a Journal Entry from an Existing Outlook Item

9. Right-click the new **Journal Entry** item in the timeline (you may need to scroll left or right if the task isn't showing). A shortcut menu is displayed, as shown below.



Step by Step: Create a Journal Entry from an Existing Outlook Item

10. Click **Open Item Referred To** on the shortcut menu. The email message that you selected at the beginning of this exercise opens.
 11. CLOSE the Message window and return to the Journal.
- **PAUSE. LEAVE** Outlook 2013 open to use in the next exercise.

Step by Step: Create a Manual Journal Entry

- **GET READY. LAUNCH** Outlook 2013 if it is not already running.
 1. If necessary, click **Folders** in the Navigation bar and select **Journal** in the Folders List to open the Journal with the default Timeline view.
 2. Click **Journal Entry** on the Ribbon. A blank Journal Entry window is displayed.

Step by Step: Create a Manual Journal Entry

3. Click **Start Timer** in the Timer group on the Ribbon. Outlook 2013 starts a timer that will continue recording time until you stop the timer later in this exercise.
4. If necessary, in the *Entry type* field, select **Phone call** from the list. The Phone call option is the default entry type.
5. In the **Subject** field, key **Custom Tour Expectations**.

Step by Step: Create a Manual Journal Entry

6. In the message area, key:

Wants to take a whitewater rafting trip. [Press Enter.]

Wants at least one night camping by the river. [Press Enter.]

There will be 13 people on the trip. [Press Enter.]

Only 2 skilled rafters; the rest have never rafted before.
[Press Enter.]

They don't like fish. We'll need to bring in other food for dinner. [Press Enter.]

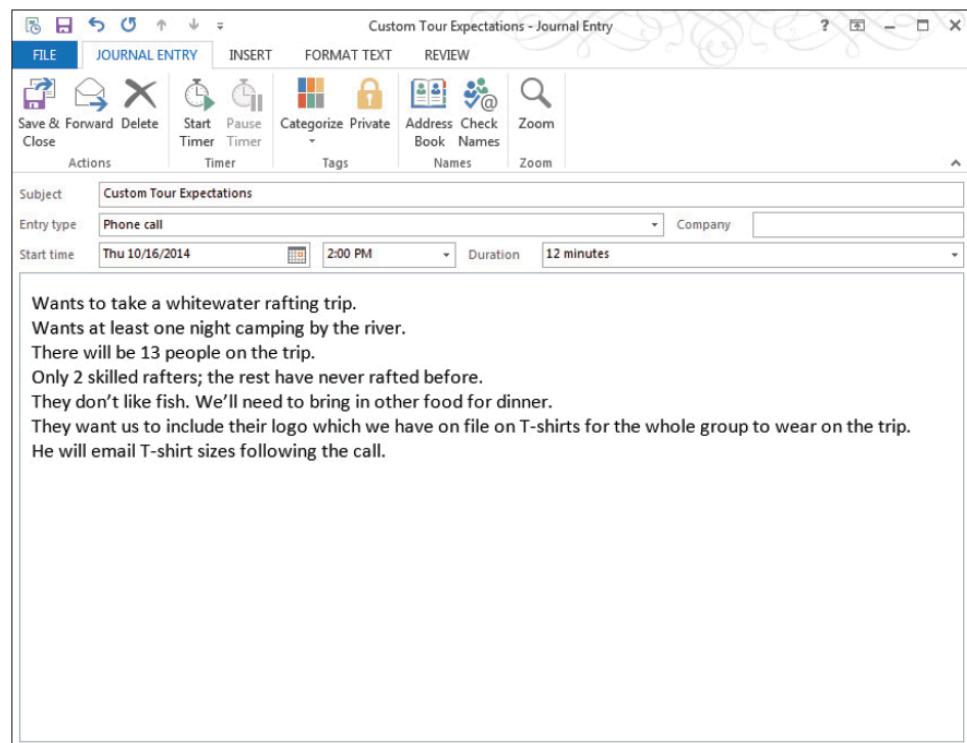
They want us to include their logo which we have on file on T-shirts for the whole group to wear on the trip.

[Press Enter.]

He will email T-shirt sizes following the call.

Step by Step: Create a Manual Journal Entry

7. Click **Pause Timer** in the Timer group on the Ribbon.
Outlook 2013 records the amount of time you spent on the phone creating this entry. Compare your Journal Entry window to the one shown at right.

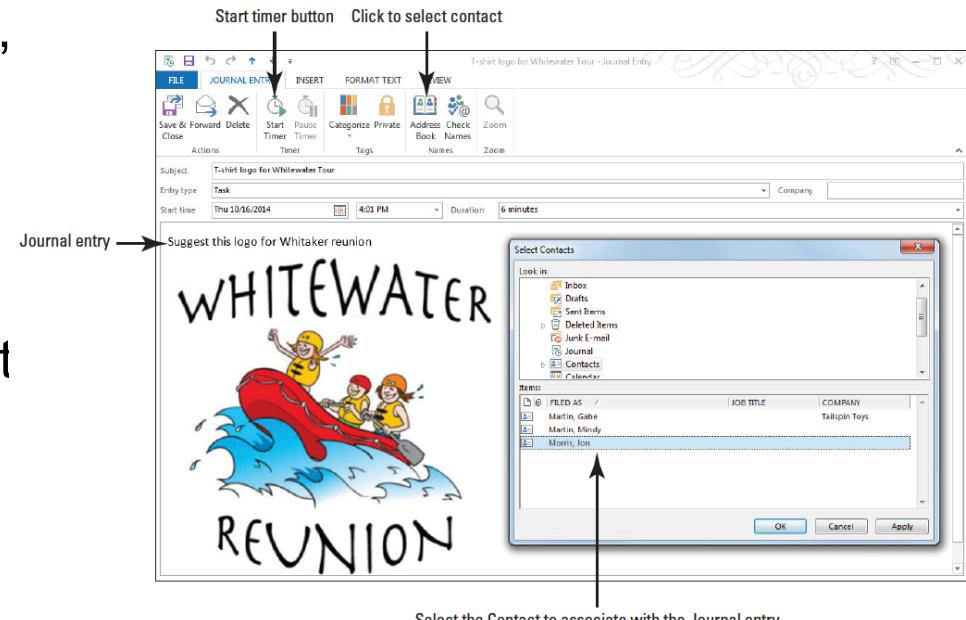


Step by Step: Create a Manual Journal Entry

8. Click **Save & Close**.
9. Click **Journal Entry** on the Ribbon.
10. Click **Start Timer** in the Timer group on the Ribbon.
11. In the Subject field, key **T-shirt logo for Whitewater Tour**.
12. In the message area, key **Suggest this logo for Whitaker reunion.** ~~[Press Enter]~~
13. Click the **INSERT** tab and select the **Pictures** button.
14. Navigate to your data files for this lesson and click the **Logo** file and click **Insert**.

Step by Step: Create a Manual Journal Entry

15. In the *Entry type* field, select **Task** from the list.
 16. In the Names group, click **Address Book** and select the contact shown at right.
 17. Click **OK**. Click **Save & Close**.
- **PAUSE. LEAVE**
Outlook 2013 open to use in the next exercise.

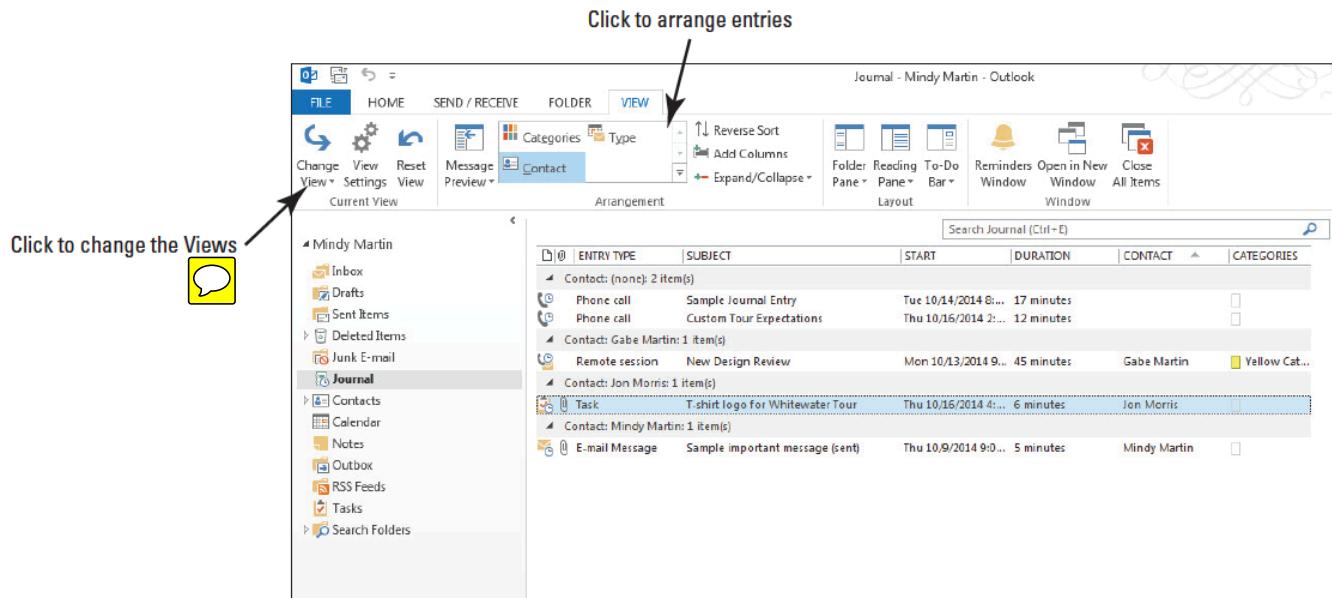


Step by Step: Change Journal Views

- **GET READY. LAUNCH** Outlook 2013 if it is not already running.
 1. If necessary, click **Journal** in the Folders List. Click **Timeline** in the View group to return to the Timeline view.
 2. In the Arrangement group, click **Month**. The Journal timeline condenses to show more of the month.
 3. In the Current View group, click **Entry List**. The journal entries are now presented as a vertical list.
 4. In the Current View group, click **Phone Calls**. Only the *Custom Tour Expectations* journal entry is visible.
 5. On the **VIEW** tab, click the **Change View** button.

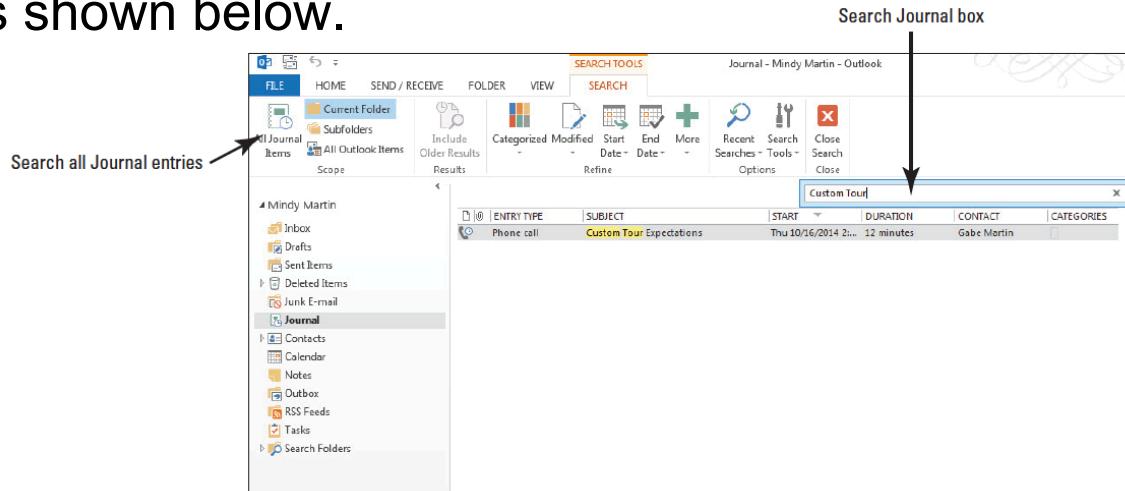
Step by Step: Change Journal Views

6. Select **Last 7 Days**. This view looks very much like the Entry List view, but includes only the entries that were recorded over the last week.
7. Click **Contact** in the Arrangement gallery. The journal entries are now grouped by contact name, as shown below.



Step by Step: Modify Journal Entries

- **GET READY. LAUNCH** Outlook 2013 if it is not already running and complete the previous exercise.
 1. If necessary, click **Journal** in the Folders List to open the Journal with the Timeline view. Switch to this view on the **VIEW** tab, if necessary.
 2. Key **Custom Tour** in the **Search Journal** box and [Press **Enter**]. The **SEARCH TOOLS SEARCH** tab is displayed, along with a results list containing your Custom Tour Expectations entry, as shown below.



Step by Step: Modify Journal Entries

3. Double-click on the **Custom Tour Expectations** entry in the results list.
4. In the Names group, click **Address Book**, and select **[the contact record for the friend or coworker]**. Click **OK**.
5. Click **Save & Close**.
6. Click the **x (Close)** icon in the Search Journal box to clear the search.
7. Double-click the **T-shirt logo for Whitewater Tour** entry in the Journal Entries list.

Step by Step: Modify Journal Entries

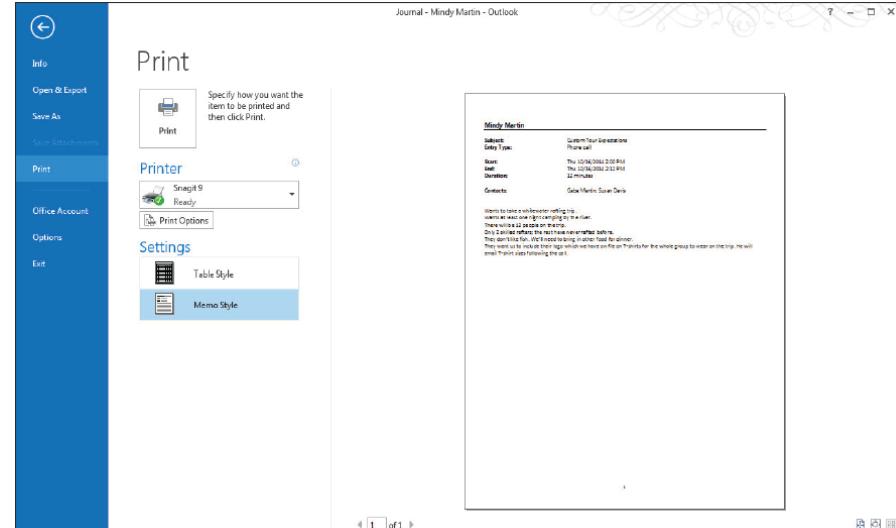
8. Click the **Duration** drop arrow and select **15 minutes**.
 9. Click **Save & Close** to close the journal entry.
 10. On the **HOME** tab, click **Timeline** in the Current View group.
 11. Click **Week** in the Arrangement group.
- **PAUSE. LEAVE** Outlook 2013 open to use in the next exercise.

Step by Step: Print the Journal

- **GET READY. LAUNCH**

Outlook 2013 if it is not already running and be sure to complete the previous exercise.

1. If necessary, click **Journal** in the Folders List.
2. Select the **Custom Tour Expectations** journal entry.
3. Click **File** and click **Print**.
4. Select **Memo Style**. The journal entry appears, as shown above.



Step by Step: Print the Journal

5. Click **Print**. Turn in the journal entry to your instructor.
6. Click the **Back** arrow to return to the Journal feature, if necessary.
7. Click **Timeline** in the View group to return to the Timeline view.
8. Click in the Navigation bar to open the list of additional features.
9. Select **Navigation Options**. The Navigation Options dialog box is displayed.
10. Click the **Reset** button and click **OK**. **CLOSE** Outlook 2013.

Skill Summary

| Skills | Exam Objective | Objective Number |
|--------------------------|-------------------------|------------------|
| Working with Notes | Create and manage notes | 3.4.2 |
| Working with the Journal | Create journal entries | 3.4.4 |