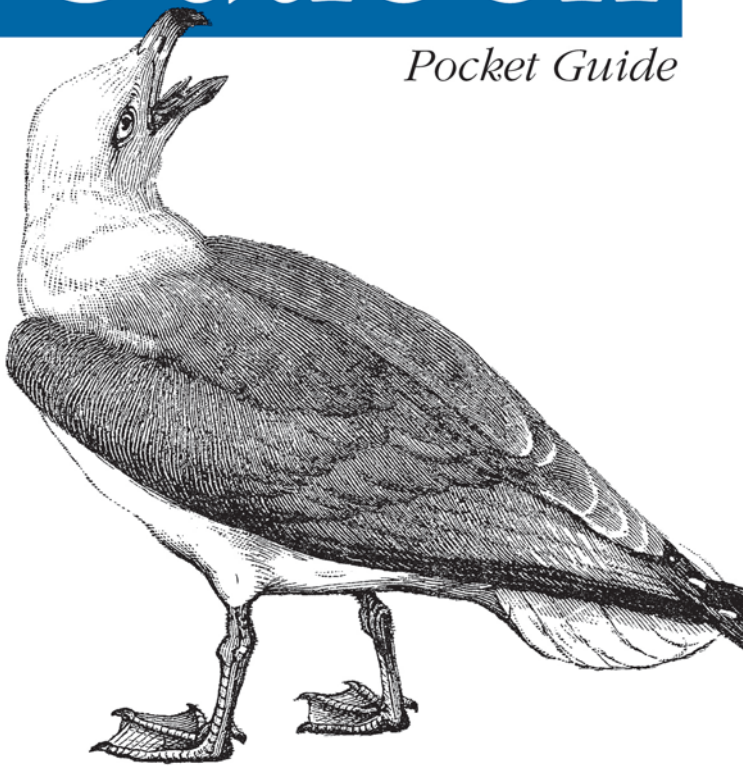
No-Fluff Help for Outlook Users

Outlook

Pocket Guide



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Walter Glenn

Windows Applications/Outlook

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Outlook Pocket Guide

Microsoft Outlook is more than just a popular email client: it's also a versatile calendar, contact manager, task list, journal keeper, meeting scheduler, and more. Packed with information about this amazing technology, the *Outlook Pocket Guide* is a condensed handbook perfect for everyone, including beginners, power users, help desk staff, or anyone who needs a handy reference to the huge number of tasks Outlook can perform. No matter what your level of expertise, you're sure to learn some shortcuts from this book.

The *Outlook Pocket Guide* covers Outlook 2002 and 2000. It includes:

- A brief guide to the most important things you need to know about how Outlook works
- An extensive quick reference to common tasks and little-known time-saving solutions
- Reference tables for keyboard shortcuts, commands, file locations, and more

If you're new to Outlook, this book gets you up to speed quickly. If you're an Outlook veteran, you'll be surprised at some of the new tricks you'll learn.

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by Walter Glenn

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Outlook Pocket Guide

Introduction

This Pocket Guide is a quick-reference guide to the most recent versions of Microsoft Outlook—2000 and 2002. It is useful for both new and experienced users of Outlook and is put together in the following way:

- Part I provides an overview of the most important concepts for working in Outlook. It should leave you with a firm understanding of what Outlook does.
- Part II covers general tasks that apply no matter what specific function of Outlook you are using. These tasks are categorized by function for easy reference. While Parts II through VIII are designed primarily as a reference, you can learn a lot about Outlook from browsing through the tasks.
- Part III covers tasks related to setting up and using Outlook email.
- Part IV covers Outlook's calendar function.
- Part V covers Outlook's contact feature.
- Part VI covers Outlook's Task List.
- Part VII covers Outlook's note feature.
- Part VIII covers Outlook's journal.
- Part IX contains a number of reference tables so that you can quickly look up otherwise hard-to-find information.
- Part X lists several online resources, additional books, and Outlook add-in tools that may be useful to you.

Conventions Used in This Book

The following typographical conventions are used in this book:

Italic
: Indicates new terms, URLs, filenames, file extensions, directories, commands and options, and program names. For example, a path in the filesystem will appear as *C:\Program Files\Microsoft Office*.

`Constant width`
: Shows the contents of files or the output from commands.

`Constant width bold`
: In examples and tables, shows commands or other text that should be typed literally by the user.

`Constant width italic`
: In examples and tables, shows text that should be replaced with user-supplied values.

Variable lists
: The variable lists throughout Parts II–VIII of this book present tasks as the answer to a "How do I…" question (e.g., "How do I find all messages from a particular person?").

Menus/Navigation
: Menus and their options are referred to in the text as File → New, Tools → Forms → Choose Form, and so on. Arrows are also used to signify a navigation path when using window options; for example, Tools → Options → Preferences → "Default reminder" means that you would open the Tools menu, select the Options command, switch to the Preferences tab, and select the "Default reminder" option on that tab.

Pathnames

Pathnames are used to show the location of a file or application in Windows Explorer. Folders are separated by a backward slash. For example, if you see something like, "…default location is *C:\Program Files\Microsoft Office*" in the text, that means the default location of the file being discussed is in the *Microsoft Office* subfolder of the *Program Files* folder.

Menu symbols

When looking at the menus for any application, you will see symbols associated with keyboard shortcuts for a particular command. For example, to print an item in Microsoft Outlook, you could go to the File menu and select Print (File → Print), or you could issue the keyboard shortcut, Ctrl-P.

TIP

Indicates a tip, suggestion, or general note.

WARNING

Indicates a warning or caution.

In Parts II–VIII, we've highlighted some of the especially cool and useful tips for you in these boxes. Even Outlook pros might learn a thing or two, or get a reminder about an old favorite trick.

02+

Used primarily in Parts II–VIII, this icon indicates that the features discussed are available only in Outlook 2002 and newer versions. Outlook 2000 does not support features marked with this icon.

PART I

Understanding Outlook

The first part of this book introduces the principal functions of Outlook. The intent of this part is to help new users hit the ground running and to provide experienced users with a keener understanding of why Outlook works (and sometimes doesn't work) the way it does.

Outlook provides six primary functions, all of which interact with one another. These functions include:

Email
: Set up any number of email accounts and manage them all from a single Inbox. Accounts can include Internet email accounts from an ISP or mailboxes on a company mail server, such as Microsoft Exchange Server. See Part III for tasks specific to this function.

Calendar
: Record appointments and meetings, view other people's calendars, and set up meetings automatically via email. See Part IV for calendar tasks.

Contacts
: Store information about people, such as addresses, phone numbers, email addresses, and much more. See Part V for contacts tasks.

Tasks
: Keep a running to-do list complete with due dates. See Part VI for tasks specific to this function.

Notes
: Keep free-form text notes that don't fit anywhere else or temporarily store information here. See Part VII for notes tasks.

Journal
: Automatically or manually record anything that happens in your life. See Part VIII for journal tasks.

Each of these major functions gets its own part in this book. You'll find tasks that apply to Outlook in general listed in Part II. Unlike Parts II–VIII, Part I (which you're reading now) is not really about specific tasks. Rather, it discusses the most important concepts of Outlook—the things that all Outlook users should understand. This part covers:

- The Outlook interface
- How Outlook stores information
- Folders and items
- Views
- Forms
- Shortcut menus
- Categories
- Address books
- Accounts
- Profiles

The Outlook Interface

Though many new elements have been added to Outlook over the years, the basic Outlook interface has not really changed too much. Figure 1-1 shows the Outlook interface with all optional views enabled and all the parts labeled. Your view of Outlook might look a little different, but probably just because you have some things (such as the Folder List) turned off. In the following discussion of the parts of the interface, you'll learn how to turn each part on or off.

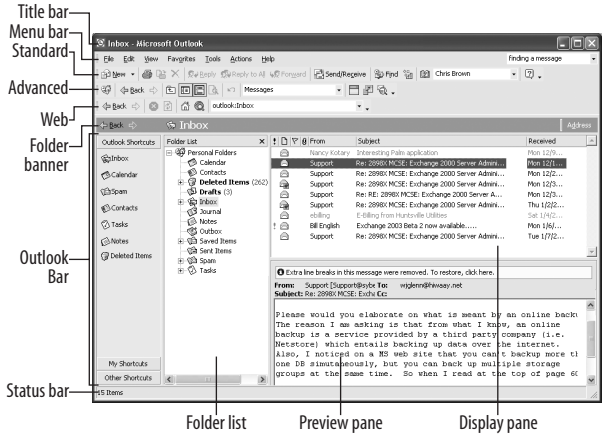

Figure 1-1. The Outlook interface

NOTE

The figures in this book are based on Outlook 2002; for the most part, you'll find that the interface is the same in Outlook 2000 and 2002. Any differences are indicated in the text.

The following list describes the important elements of the Outlook interface:

Title bar

The title bar shows the name of the folder you are currently working in. It also holds the Minimize, Maximize, and Close buttons for the Outlook window. Clicking the Outlook icon on the title bar reveals the control menu with additional window commands—you can get the same menu by right-clicking the Outlook taskbar button in Windows.

Menu bar

Menus hold all of the common commands available in Outlook. Commands on some of the menus (especially the Action menu) change depending on the type of folder selected (email, contacts, tasks, etc.). The menu bar (and other toolbars) are normally docked to the top of the window, but you can drag them to float anywhere on your screen (or just rearrange their docking order) using the handle at the far left of the bar. Outlook retains the positioning of menu and toolbars even after it is shut down.

A feature named adaptive menus is enabled by default, causing Outlook to show only the basic commands (as decided by Microsoft) and the most frequently used commands, unless you click an extra button to show the rest. You can turn off this feature using Tools → Customize → Options → Always Show Full Menus.

TIP

If you are learning Outlook, turn off adaptive menus. Being able to browse a full list of commands and find commands where you expect them is vital to the learning process. Even if you're experienced, consider turning the feature off and customizing your menus instead. See Part II for more on customizing.

Standard toolbar

Toolbars work much like menu bars and, in fact, can be customized to hold menus. The Standard toolbar holds buttons for common commands from the File, Edit, Tools, and Action menus. Figure 1-2 shows the commands you will *always* see on the Standard toolbar. Additional command buttons are added depending on the type of folder selected.

Figure 1-2. The Standard toolbar

1. The *New* button (also Ctrl-N) creates a new item based on the currently selected folder (e.g., a new email message opens when viewing an email folder). Click the down arrow to create a new item of another kind (including new folders and Outlook Bar shortcuts).
2. *Print* sends the currently selected item directly to the printer with no confirmation dialog. Use File → Print or Ctrl-P to open the Print dialog for more choices.
3. *Move to Folder* opens a submenu that lists recently accessed folders in Outlook. Select one from this list to move the currently selected item there, or choose Move to Folder to open a dialog with a full folder list. Ctrl-Shift-V also opens this dialog.
4. *Delete* moves the selected item to the Deleted Items folder. Press the Delete key for the same effect. Hold down Shift while using the Delete button or key to permanently delete the item.
5. *Find* (also Ctrl-E) opens a small Find bar directly above the Display pane, with fields for performing a quick search. The search defaults to the current folder. On the Find bar, use Options → Advanced Find for more sophisticated search tools. Without the Find bar open, use Tools → Advanced Find or Ctrl-Shift-F to open the same advanced search dialog.
6. *Organize* opens a new pane above the Display pane with commands for using folders, colors, and views to organize items and filter junk email. These tasks are covered in Part II.

7. *Address Book* opens the Windows Address Book, which is covered later in this part.
8. Type a name or part of a name in the *Find a Contact* box and press Enter to open a dialog displaying all contacts that match that name. Click the down arrow to the right of the box to view recent searches for contacts.
9. The *Help* button (also Help → Microsoft Outlook Help or F1) opens the Outlook help window.

Advanced toolbar

The Advanced toolbar is hidden by default. Turn it on using View → Toolbars → Advanced. The Advanced toolbar holds mostly navigational and view commands from the View menu. Figure 1-3 shows the buttons you will always see on the Advanced toolbar. Again, other commands are added when viewing certain folder types.

Figure 1-3. The Advanced toolbar

1. *Outlook Today* sends you to the Outlook Today page, a summary view of new messages and tasks.
2. *Back* and *Forward* work like browser commands, taking you back (or forward) to the item you were looking at previously—even if it was in a different folder. You can also press the Backspace key to go back.
3. *Up One Level* takes you up one level in the folder list.
4. *Folder List* and *Preview Pane* toggle the display of those panes in the Outlook window.
5. *Print Preview* (or File → Print Preview) opens a window that shows what the current item will look like

when printed. You can find more information about printing specific items throughout this book.

6. *Undo* (Edit → Undo or Ctrl-Z) undoes the last filing action (such as moving or deleting an item).
7. The *Current View* drop-down menu displays a list of views that you can use for the current folder. This list changes depending on the type of folder selected.

Web toolbar

The Web toolbar contains standard browser commands for controlling Outlook when it is used to view web pages. Commands on this menu do not change. This toolbar is hidden by default, but you can turn it on using View → Toolbars → Web.

TIP

A quick way to customize the buttons shown on any toolbar is to click the small down arrow at the far right, point to Add or Remove Buttons, and then choose the buttons you want displayed.

Folder banner

For the most part, the Folder banner is not very useful; unfortunately, you can't turn it off. It shows the name of the folder you are in (useful if you don't keep the folder list open or pay attention to the title bar), has back and forward commands that duplicate the function of those found on the Advanced toolbar, and has a few web-like fields and buttons that duplicate the functionality of those found on the Web toolbar. When viewing a calendar, it also shows the date range. You can also click the folder name to open the Folder List—a feature already provided by the Folder List button on the Advanced toolbar and the View → Folder List command.

In Outlook 2000, a similar version of this banner appears over the Display pane and Folder List (it does not extend over the Outlook Bar), but it does not hold the address

box or web commands. It holds only the name of the folder, which you can click to open the Folder List.

TIP

Right-click the Folder banner to access commands from the File → Folder submenu that manipulate the folder. You'll also find a command for opening a copy of the folder in its own window—great for keeping a calendar or contact list open while working in another folder in the main Outlook window. This same shortcut menu is displayed when you right-click any folder in the Folder List.

Outlook Bar

The Outlook Bar is visible by default, but you can turn it on or off using View → Outlook Bar. The Outlook Bar is essentially a pretty holder for shortcuts to Outlook folders, individual Outlook items, web pages, or programs and files on your computer (or network). Left in its default setup, it's not nearly as useful as just leaving the Folder List open. However, you can customize the Outlook Bar to make it a pretty powerful tool. Check out Part II for more.

Folder List

The Folder List is not visible by default. You can turn it on using View → Folder List. You can also click the name of the folder in the folder banner to open the Folder List temporarily. A small pushpin icon appears in the upper-right corner of the list; click this to make the list stay open. The Folder List displays all Outlook folders in a familiar tree structure. While you can get around with other navigational commands, and a customized Outlook Bar can save you a lot of time, the Folder List is the final word on navigating Outlook. It shows the actual folder structure and every folder you have. Toggle it on or off using View → Folder List, the Folder List button on the Advanced toolbar, or by clicking the folder name on the Folder banner.

TIP

Even if the Folder List is closed, you can drag an item from the Display pane onto the folder name on the banner to pop open the Folder List. While continuing to drag, hold the pointer over the plus sign next to any closed folder and the folder opens in the Folder List. Drag to the top or bottom of the list to scroll. Drop the item in a new folder to move it there. Hold Ctrl while dragging in order to copy, rather than move, the item.

Display pane

The Display pane shows all of the items in the selected folder. The view and function of the Display pane changes depending on what type of folder you view. For information on changing views and using the Display pane for a particular folder type, see the appropriate part of this book (e.g., see Part III for email folders).

Preview pane

The Preview pane is hidden by default, but you can turn it on using View → Preview Pane. The Preview pane, available for most types of folders, shows the properties or contents of an item without having to open the item. For example, when an email message is selected (as in Figure 1-1), the Preview pane shows the basic email headers (From, To, Subject, and Cc) along with the message text.

Status bar

Outlook's status bar really doesn't do much. When viewing a folder, it shows the number of items in the folder. When viewing an email folder, it also shows how many unread messages are in the folder. When Outlook is sending and receiving mail, the status and any error alerts are shown on the righthand side.