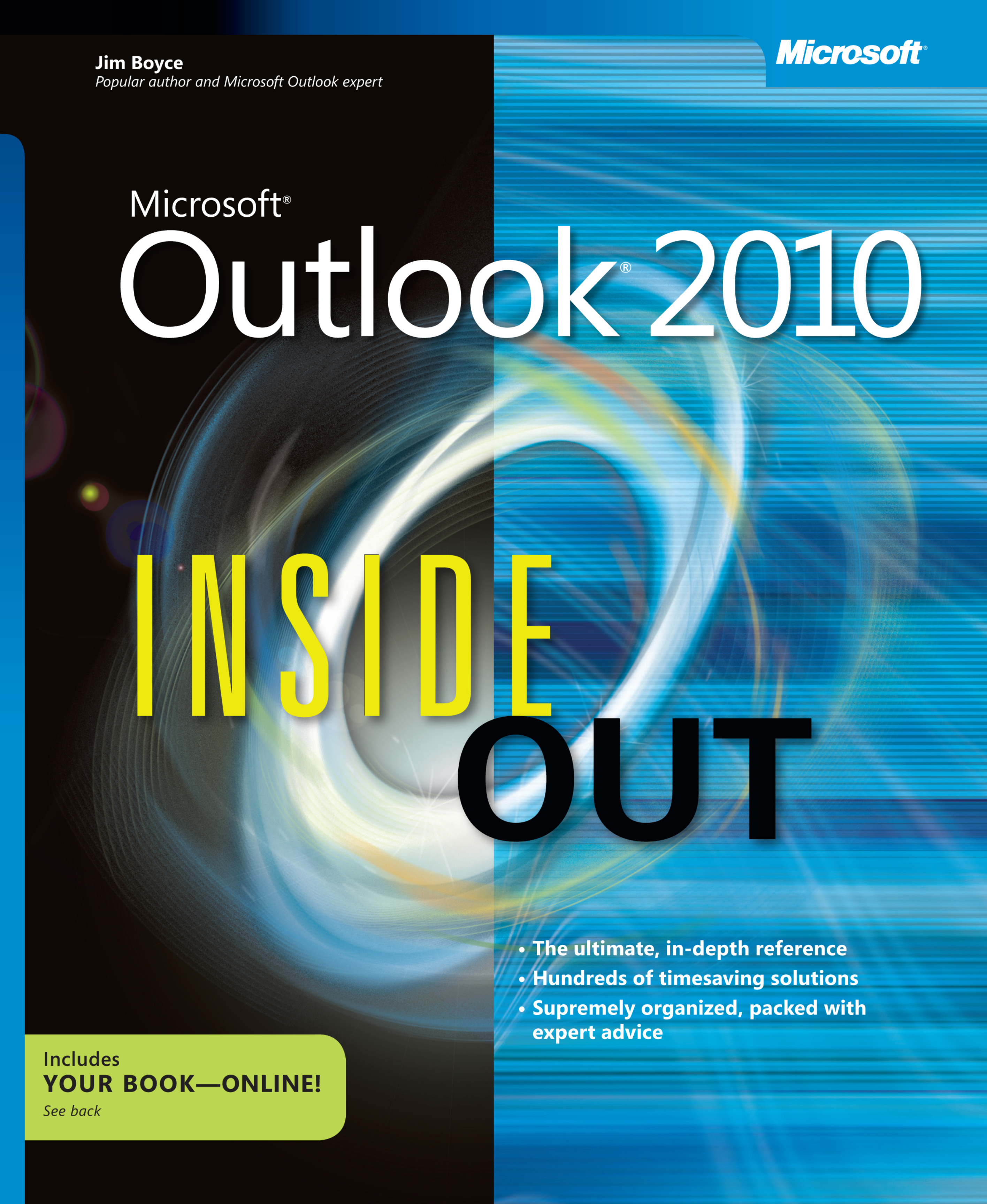

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Jim Boyce is a highly-regarded expert on operating systems and productivity software. He's written and contributed to more than 50 books and served as a contributing editor for *Windows Magazine*. Jim is the coauthor of *Microsoft Office Outlook 2007 Inside Out*, and author of *Microsoft Office Outlook 2003 Inside Out*.

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Conventions and Features Used in This Book

This book uses special text and design conventions to make it easer for you to find the information you need.

Text Conventions

Convention	Feature
Abbreviated menu commands	For your convenience, this book uses abbreviated menu commands. For example, "Choose Tools, Forms, Design A Form" means that you should click the Tools menu, point to Forms, and select the Design A Form command.
Boldface type	Boldface type is used to indicate text that you enter or type.
Initial Capital Letters	The first letters of the names of menus, dialog boxes, dialog box elements, and commands are capitalized. Example: The Save As dialog box.
Italicized type	Italicized type is used to indicate new terms.
Plus sign (+) in text	Keyboard shortcuts are indicated by a plus sign (+) separating two key names. For example, Shift+F9 means that you press the Shift and F9 keys at the same time.

Design Conventions

Note

Notes offer additional information related to the task being discussed.

Cross-references point you to other locations in the book that offer additional information on the topic being discussed.

CAUTION!

Cautions identify potential problems that you should look out for when you're completing a task, or problems that you must address before you can complete a task.

INSIDE OUT **This statement illustrates an example of an "Inside Out" problem statement**

These are the book's signature tips. In these tips, you'll get the straight scoop on what's going on with the software—inside information on why a feature works the way it does. You'll also find handy workarounds to different software problems.

TROUBLESHOOTING

This statement illustrates an example of a "Troubleshooting" problem statement

Look for these sidebars to find solutions to common problems you might encounter. Troubleshooting sidebars appear next to related information in the chapters. You can also use the Troubleshooting Topics index at the back of the book to look up problems by topic.

Sidebar

The sidebars sprinkled throughout these chapters provide ancillary information on the topic being discussed. Go to sidebars to learn more about the technology or a feature.

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Introduction

Fifteen years ago, the average computer user spent most of his or her time using productivity applications such as Microsoft® Word or Microsoft Excel®. In the ensuing years, users have become more sophisticated, network implementations have become the rule rather than the exception, and collaboration has become a key facet of a successful business strategy. Perhaps the most significant change of all has been the explosive growth of the Internet. All these factors have led to a subtle but significant shift in the way people work. Today, most users of the 2010 Microsoft Office system spend a majority of their time in Microsoft Outlook® 2010. That change alone signifies a shift toward information management as an increasingly important everyday task. Getting a handle on daily information management can be critical to your productivity, success, and sanity.

Outlook® 2010 is an extremely versatile program. Most of the other applications in the Microsoft Office system suite have a fairly specific purpose. Outlook 2010, however, serves as personal information manager (PIM), calendar, e-mail application, task manager, and much more. With so much power and flexibility at your fingertips, you need to have a good understanding of the Outlook 2010 features. Understanding the ins and outs will not only help you get the most from this program but will also have a positive impact on your work day.

Who This Book Is For

Understanding all of the Outlook 2010 features and putting them to work is the focus of *Microsoft® Outlook® 2010 Inside Out*. Most Outlook 2010 books act mainly as how-to guides for users who want to learn about the software. This approach leaves out workgroup managers and administrators when it comes to deployment, collaboration, server-side issues, and administration. *Microsoft Office Outlook 2010 Inside Out* offers a comprehensive look at the features most people will use in Outlook 2010 and serves as an excellent reference for users who need to understand how to accomplish what they need to do. In addition, this book goes a step or two further, providing useful information to advanced users and IT professionals who need to understand the bigger picture. Whether you want to learn Outlook 2010 for your own use, need to support Outlook 2010 on a peer-to-peer network, or are in charge of supporting Outlook 2010 under Microsoft Exchange Server, you'll find the information and answers you need between the covers of *Microsoft Office Outlook 2010 Inside Out*.

This book makes some assumptions about the reader. You should be familiar with your client operating system, whether it's Microsoft Windows® XP, Windows Vista™, or Windows 7. You should be comfortable working with a computer and have a good understanding of how to work with menus, dialog boxes, and other aspects of the user interface. In short, *Microsoft Office Outlook 2010 Inside Out* assumes that you're an experienced computer user who might or might not have an understanding of Outlook 2010 and what it can do. The purpose of this book is to give you a comprehensive look at what Outlook 2010 can do, how to put Outlook 2010 to work, and how to manage Outlook 2010 at the user, workgroup, and server levels.

How This Book Is Organized

Microsoft Office Outlook 2010 Inside Out offers a structured, logical approach to all aspects of using and managing Outlook 2010. Each of the 10 parts of this book focuses on a specific aspect of Outlook 2010 use or management.

Part 1—Working with Outlook

Part 1 starts with the basics. Chapter 1 takes a look at the features that are new in Outlook 2010. Chapter 2 takes a look at the Outlook 2010 architecture and startup options. In Chapter 3, you'll learn how to perform advanced setup and configuration tasks such as setting up e-mail accounts, using profiles, making Outlook 2010 work with other e-mail services, configuring receipt and delivery options, and using add-ins that extend the Outlook 2010 functionality. Chapter 4 gets you up to speed using Outlook 2010 to send and receive messages, manage your workday, locate information on the Internet, and perform other common tasks. Chapter 5 rounds out Part 1 with a detailed look at how you can use categories to organize your data in Outlook 2010.

Part 2—E-Mail and Other Messaging

Part 2 delves deeper into the Outlook 2010 e-mail components and features. In Chapter 6, you'll learn how to manage address books and distribution lists. Chapter 7 explains how to set up Internet e-mail accounts. Chapter 8 will help you start to manage the e-mail features in Outlook 2010. Chapter 9 will make you comfortable with the range of features Outlook 2010 provides for creating messages both simple and complex. In Chapter 10, you'll learn how to find and organize your messages. Chapter 11 explains how to apply filters and rules to process messages automatically. Chapter 12 will help you exclude junk and spam e-mail senders. Look to Chapter 13 to learn how to generate automatic responses to incoming messages.

Because security is an increasingly important topic, Chapter 14 will help you secure your system and your data, send messages securely, and prevent others from impersonating you to send messages. Chapter 15 offers a comprehensive look at how the Outlook 2010 remote mail features can be indispensable for managing your mail online and offline. Chapter 16 explains how to use the new Really Simple Syndication (RSS) features to subscribe to and read RSS feeds in Outlook 2010. Chapter 17 rounds out the section with an explanation of Lightweight Directory Access Features (LDAP) features in Outlook 2010.

Part 3—Working with Contacts

Part 3 explores the Outlook 2010 features for managing your contacts. Chapter 18 starts with a look at how to manage contact information, including addresses, phone numbers, e-mail addresses, fax numbers, and a wealth of other information. You'll also learn how to sort, filter, and categorize your contacts, as well as share contact data with others.

Part 4—Managing Your Time and Tasks

Part 4 covers scheduling, one of the most widely used features in Outlook 2010. Chapter 19 provides an in-depth look at the Outlook 2010 appointment-scheduling capabilities. You'll learn how scheduling works, and you'll learn how to schedule appointments, create recurring appointments, use color effectively to manage your schedule, allow others to access your schedule, and publish your schedule to the Web. Chapter 20 takes a look at scheduling meetings and resources using Outlook 2010 and explains the subtle differences between scheduling appointments and scheduling meetings. Chapter 21 examines all aspects of managing tasks with Outlook 2010. You can use the Outlook 2010 Tasks folder to keep track of your own tasks as well as assign tasks to others. Integrating your tasks in Outlook 2010 can help you ensure that your tasks get done on time and are allocated to the appropriate person to complete them.

Chapter 22 offers a look at journaling, an important feature in Outlook 2010 that allows you to keep track of time spent on projects and documents and to track contacts and other items of interest. Chapter 23 takes a look at notes, a useful feature in Outlook 2010 that will help you get rid of those little slips of paper cluttering your desk and the sticky notes taking over your monitor. You'll learn how to create notes, assign categories to them, change their color, move them to other applications, put them on your desktop, and much more. Chapter 23 also explores Microsoft OneNote, which you'll find a much better alternative to the Notes folder in Outlook for keeping notes and related information.

Part 5—Customizing Outlook

Customizing an application or the user interface for your operating system isn't just a matter of picking and choosing your personal preferences. Your ability to customize the way an application functions or appears can have a profound impact on its usefulness to you and to others. In short, the ability to customize an application allows you to make that application do what you want it to do in the way that makes the most sense to you. Chapter 24 starts the coverage of customization with a look at templates and how they can simplify the creation of e-mail messages, appointments, events, and other Outlook 2010 objects. You'll learn not only how to create and edit templates, but also how to share those templates with others.

Chapter 25 provides the detailed information you need to customize the Navigation Pane, the toolbar that appears by default to the left of the Outlook 2010 window and gives you quick access to the Outlook 2010 components. Chapter 25 also helps you customize the other aspects of the Outlook 2010 interface, including toolbars, Outlook Today view, and folders. Chapter 26 explains how to create custom views and print styles for organizing and displaying your Outlook 2010 data. Chapter 27 takes a look at creating and using custom forms for a variety of tasks. Chapter 28 gives you a look at a host of ways you can automate tasks in Outlook 2010.

Part 6—Managing and Securing Outlook

Part 6 begins the transition to more advanced topics of interest to users, administrators, and IT professionals. In Chapter 29, you'll learn how Outlook 2010 uses folders to store your data and how to manage those folders. Chapter 29 also offers in-depth coverage of how to organize and archive your important data. In Chapter 30, you'll learn how to archive, back up, and restore your Outlook 2010 data. The chapter not only covers the importance of a sound backup and recovery strategy but will also help you develop and implement your own strategy that takes into account the unique requirements of Outlook 2010 and Exchange Server.

In Chapter 31, you'll learn how to move data in an out of Outlook 2010 using the program's import and export features. Chapter 32 will help you get a handle on all of your Outlook 2010 data, with a discussion of the new Instant Search feature and other features in Outlook 2010 for finding and organizing data. Chapter 33 includes an analysis of the importance of virus protection and how to guard against virus infections and outbreaks. You'll read about both client-side and server-side solutions. Because up-to-date virus definitions are the key to successful prevention, Chapter 33 takes a close look at developing a virus definition update strategy. You'll also find a detailed discussion of how to configure attachment blocking at the server as well as in Outlook 2010 itself.

Part 7—Collaboration

Chapter 34 will help you simplify your life by teaching you how to delegate many of your responsibilities—including managing your schedule—to an assistant. Chapter 35 will help you coordinate your schedule with others by teaching you to share your calendar. Chapter 36 explains how to integrate Outlook 2010 with other Microsoft Office system applications, such as performing a mail merge in Microsoft Office Word 2010 based on contacts stored in Outlook 2010. Chapter 37 explores Office Communicator and Office Communications Server, focusing on the integration between OCS, Outlook, and SharePoint. Chapter 38 explores online collaboration with SharePoint and how you can use Outlook to interact with SharePoint sites and data. You'll learn how to work with shared contacts, set up and use alerts, work with shared documents, link a team calendar to Outlook 2010, and more.

Part 8—Using Outlook with Exchange Server

Outlook 2010 can be an effective information management tool all by itself, whether you use it on a stand-alone computer or on a network in collaboration with other users. Where Outlook 2010 really shines, however, is in its integration with and as a client for Microsoft Exchange Server. Part 8 steps up to a more advanced level to explain a broad range of Outlook 2010/Exchange Server integration topics. Chapter 39 turns the focus to the client, explaining how to configure Outlook 2010 as an Exchange Server client. Chapter 40 explores the wealth of features in Outlook 2010 specifically geared toward messaging with Exchange Server, such as the ability to recall sent messages before they are read, prioritize messages, and much more. This chapter also contains a detailed look at voting, an interesting feature in Outlook 2010. You can use Outlook 2010 as a tool to solicit input from others on any issue or topic, receiving and tallying their votes quite easily. Chapter 41 helps you continue working when you're away from the office or when your server is offline, covering how to use remote features to access and manage your Outlook 2010 data.

Part 9—Mobility

Life isn't just about working in the confines of your office, and Part 10 takes that into account. For example, Chapter 42 explains how to connect to Exchange Server using a Web browser such as Microsoft Internet Explorer® and Outlook Web App (OWA). Chapter 43 completes this part of the book with a look at the mobility-related features in Outlook 2010—which you can use with Exchange Server 2003 and later—to take your Outlook 2010 data on the road.

See the section "Conventions and Features Used in This Book" for a list of some of the features you will find used throughout this book.

CHAPTER 5

Creating and Using Categories

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Viewing Selected Categories Only 127
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One of the primary functions of Microsoft Outlook 2010 is to help you organize your data, whether that data is a collection of contacts, a task list, your schedule, or a month's worth of messages. To make this easier, you can use Outlook 2010 categories. A category is a combination of words or phrases and colors that you assign to Outlook 2010 items as a means of organizing them. For example, you might assign the category Personal to a message from a family member to differentiate that message from your work-related messages and then customize the Inbox view to exclude personal items. Outlook 2010 incorporates color with categories, making it easy to identify categories at a glance.

This chapter explains how categories work in Outlook 2010 and shows you how to work with color categories, add categories, assign categories to Outlook 2010 items, and use categories to arrange, display, and search through Outlook 2010 data.

Understanding Categories

If you've used a personal finance or checkbook program such as Microsoft Money or Intuit's Quicken, you're probably familiar with categories. In these programs, you can assign a category to each check, deposit, or other transaction and then view all transactions for a specific category, perhaps printing them in a report for tax purposes. For example, you might use categories to keep track of business expenses and separate them by certain criteria, such as reimbursement policy or tax deductions.

Outlook 2010 categories perform essentially the same function: you can assign categories to Outlook 2010 items and manipulate the data based on those categories. For example, you might use categories to assign Outlook 2010 items such as messages and tasks to a specific project. You could then locate all items related to that project quickly. Alternatively, you might use categories to differentiate personal contacts from business contacts.

Whatever your need for organization, categories offer a handy and efficient way to achieve your goal.

Note

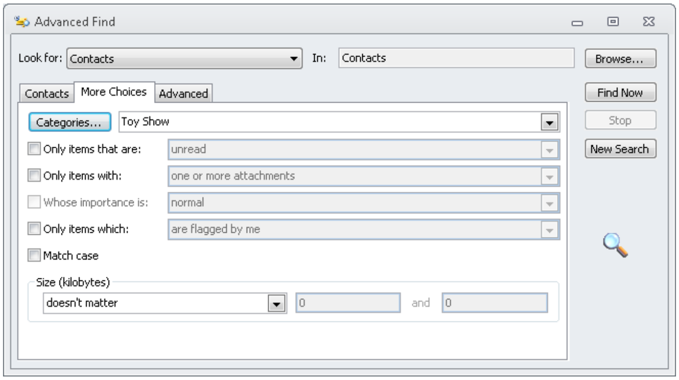
Outlook 2010 combines colors with categories, giving you the capability to see category assignments at a glance. As you'll learn later in this chapter, you can still use categories without colors, simply by assigning the color None to the category.

What can you do with categories? First, with integration of color with categories, you can tell instantly what category is assigned to a given item. For example, let's say you create a rule that assigns the Red category to all messages from a particular contact. You can then tell at a glance—without doing anything else—which messages are from that person. Or perhaps you assign the Red category to business messages and Green to personal. Whatever the case, color categories are a great means for visually identifying specific types of messages.

Tip

You can use automatic formatting to display items in certain colors when they meet criteria like sender, subject, and so on without assigning a category to the items. Alternatively, you can use rules to assign the categories automatically, which essentially gives you both automatic formatting and category options at the same time.

After you assign a category to each relevant Outlook 2010 item, you can sort, search, and organize your data according to the category. Figure 5-1, for example, shows the Advanced Find dialog box after a search for all Outlook 2010 items assigned to the category Toy Show. Figure 5-2 shows the Contacts folder organized by category, displaying all contacts who are involved in the toy show. The ability to search by category makes it easy to find all the items associated with a specific project, contract, issue, or general category.


Advanced Find
Contacts
More Choices
Advanced
Browse...
Find Now
Stop
New Search
Size (kilobytes)
and

Look for: Contacts

In: Contacts

Categories... Toy Show

☐ Only items that are: unread

☐ Only items with: one or more attachments

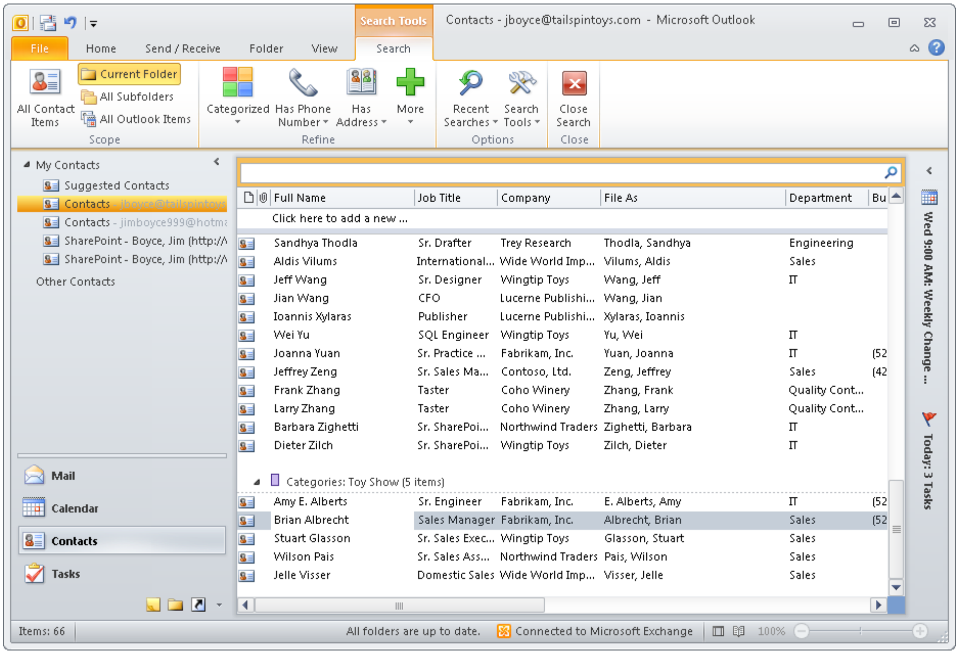
☐ Whose importance is: normal

☐ Only items which: are flagged by me

☐ Match case

Size (kilobytes): doesn't matter 0 and 0

Figure 5-1 Use the Advanced Find dialog box to search for all items in a given category.


Search Tools
Contacts - jboyce@tailspintoys.com - Microsoft Outlook
File
Home
Send / Receive
Folder
View
Search
All Contact Items
Current Folder
All Subfolders
All Outlook Items
Scope
Categorized
Has Phone Number
Has Address
More
Refine
Recent Searches
Search Tools
Options
Close Search
Close
My Contacts
Suggested Contacts
Contacts
Contacts - jimboyce999@hotm
SharePoint - Boyce, Jim (http://
SharePoint - Boyce, Jim (http://
Other Contacts
Mail
Calendar
Contacts
Tasks
Wed 9:00 AM: Weekly Change ...
Today: 3 Tasks
Items: 66
All folders are up to date.
Connected to Microsoft Exchange
100%

Full Name	Job Title	Company	File As	Department	Bu
Click here to add a new ...					
Sandhya Thodla	Sr. Drafter	Trey Research	Thodla, Sandhya	Engineering	
Aldis Vilums	International...	Wide World Imp...	Vilums, Aldis	Sales	
Jeff Wang	Sr. Designer	Wingtip Toys	Wang, Jeff	IT	
Jian Wang	CFO	Lucerne Publishi...	Wang, Jian		
Ioannis Xylaras	Publisher	Lucerne Publishi...	Xylaras, Ioannis		
Wei Yu	SQL Engineer	Wingtip Toys	Yu, Wei	IT	
Joanna Yuan	Sr. Practice ...	Fabrikam, Inc.	Yuan, Joanna	IT	(52
Jeffrey Zeng	Sr. Sales Ma...	Contoso, Ltd.	Zeng, Jeffrey	Sales	(42
Frank Zhang	Taster	Coho Winery	Zhang, Frank	Quality Cont...	
Larry Zhang	Taster	Coho Winery	Zhang, Larry	Quality Cont...	
Barbara Zighetti	Sr. SharePoi...	Northwind Traders	Zighetti, Barbara	IT	
Dieter Zilch	Sr. SharePoi...	Wingtip Toys	Zilch, Dieter	IT	
Categories: Toy Show (5 items)					
Amy E. Alberts	Sr. Engineer	Fabrikam, Inc.	E. Alberts, Amy	IT	(52
Brian Albrecht	Sales Manager	Fabrikam, Inc.	Albrecht, Brian	Sales	(52
Stuart Glasson	Sr. Sales Exec...	Wingtip Toys	Glasson, Stuart	Sales	
Wilson Pais	Sr. Sales Ass...	Northwind Traders	Pais, Wilson	Sales	
Jelle Visser	Domestic Sales	Wide World Imp...	Visser, Jelle	Sales	

Figure 5-2 You can group contacts by category to list all contacts involved in a particular event or project.

Tip

You can perform a search for items based on their categories easily using the ribbon. Just click in the Search box, which causes the Search tab to appear in the ribbon. Then, click Categorized from the Refine group and choose the categories for which to search.

Categories are useful only if you apply them consistently. After you become disciplined in using categories and begin to assign them out of habit (or with rules), you'll wonder how you ever organized your day without them.

CAUTION!

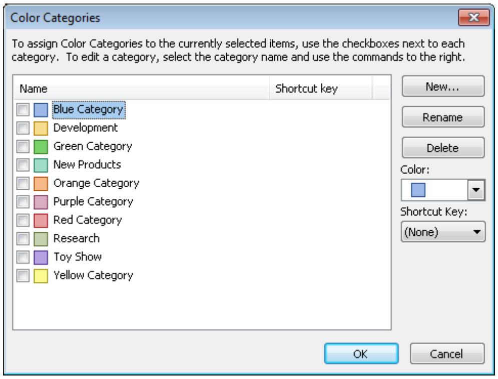
The Master Category List in versions of Outlook prior to 2007 has been removed. Categories listed in the Master Category List but not assigned to any items are not imported when you upgrade to Outlook 2010.

Customizing Your Category List

Before you assign categories to Outlook 2010 items, you should go through the category list and add the categories that you need or tailor the existing categories to suit your needs. To determine which categories to add, spend some time thinking about how you intend to use them, including which colors you want to apply to specific categories. Although you can always add and modify categories later, creating the majority up front not only saves time but also helps you organize your thoughts and plan the use of categories more effectively.

Follow these steps when you're ready to create categories:

1. Open the Color Categories dialog box, shown in Figure 5-3, by selecting any item in Outlook 2010 and clicking Categorize, All Categories from the Home tab of the ribbon or by right-clicking an item and choosing Categorize, All Categories on the shortcut menu.



Color Categories

To assign Color Categories to the currently selected items, use the checkboxes next to each category. To edit a category, select the category name and use the commands to the right.

Name	Shortcut key
☐ 🟦 Blue Category	
☐ 🟨 Development	
☐ 🟩 Green Category	
☐ 🟩 New Products	
☐ 🟧 Orange Category	
☐ 🟪 Purple Category	
☐ 🟥 Red Category	
☐ 🟩 Research	
☐ 🟪 Toy Show	
☐ 🟨 Yellow Category	

Color: 🟦

Shortcut Key: (None)

Figure 5-3. You can add a new category in the Color Categories dialog box.

2. Click New to open the Add New Category dialog box.

3. Type the new category name in the Name field, select a color in the Color drop-down list, optionally specify a shortcut key, and then click OK.

> **Tip**
>
> **Select None in the Color drop-down list if you want a text-only category.**

4. Repeat steps 2 and 3 to add other categories as desired, and then click OK to close the Color Categories dialog box.

> **Note**
>
> **When you create a new category, Outlook 2010 automatically adds the category to the selected item. You must clear the category if you don’t want it assigned to the selected item. For information about creating new categories while you are assigning categories to an item, see the next section, “Assigning Categories to Outlook Items.”**

The categories that you add to your category list depend entirely on the types of tasks that you perform with Outlook 2010, your type of business or organization, and your preferences. The following list suggests ways to categorize business-related data:

- Track items by project type or project name.
- Organize contacts by their type (for example, managers, assistants, technical experts, and financial advisors).
- Keep track of departmental assignments.
- Track different types of documents (for example, drafts, works in progress, and final versions).
- Track contacts by sales potential (for example, 30-day or 60-day).

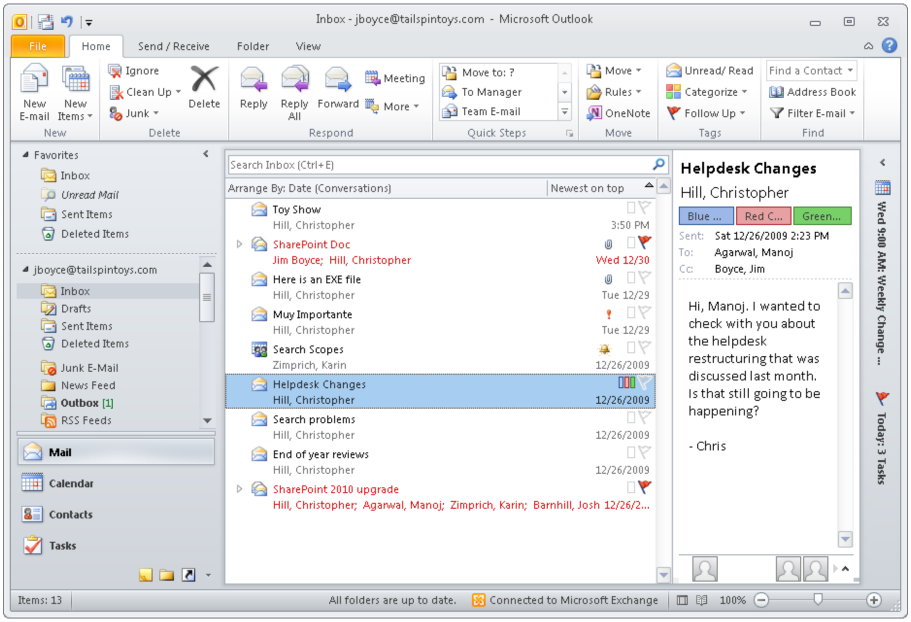
Organize items by priority. The following list offers suggestions for categorizing personal data:

- Use color to identify critical or urgent issues.
- Organize personal contacts by type (friends, family, insurance agents, legal advisors, and medical contacts, for starters).
- Track items by area of interest.
- Organize items for hobbies.
- Track items related to vacation or other activities.

Assigning Categories to Outlook Items

Assigning categories to items is easy. You can assign multiple categories to each item if needed. For example, a particular contact might be involved in more than one project, so you might assign a category for each project to that contact. If you have a task that must be performed for multiple projects, you might assign those project categories to the task.

Outlook 2010 will display multiple colors for an item, depending on its type and location. For example, if you assign the Red, Blue, and Green categories to an email message, Outlook 2010 displays each of those three color indicators in the message header, as shown in Figure 5-4. You can resize the Categories column if you want Outlook 2010 to show indicators for all the assigned categories.


Inbox - jboyce@tailspintoys.com - Microsoft Outlook
File
Home
Send / Receive
Folder
View
New E-mail
New Items
New
Ignore
Clean Up
Junk
Delete
Reply
Reply All
Forward
Meeting
More
Respond
Move to: ?
To Manager
Team E-mail
Quick Steps
Move
Rules
OneNote
Unread/ Read
Categorize
Follow Up
Tags
Find a Contact
Address Book
Filter E-mail
Find
Favorites
Inbox
Unread Mail
Sent Items
Deleted Items
jboyce@tailspintoys.com
Drafts
Junk E-Mail
News Feed
Outbox [1]
RSS Feeds
Mail
Calendar
Contacts
Tasks
Search Inbox (Ctrl+E)
Arrange By: Date (Conversations)
Newest on top
Toy Show
Hill, Christopher
3:50 PM
SharePoint Doc
Jim Boyce; Hill, Christopher
Wed 12/30
Here is an EXE file
Hill, Christopher
Tue 12/29
Muy Importante
Hill, Christopher
Tue 12/29
Search Scopes
Zimprich, Karin
12/26/2009
Helpdesk Changes
Hill, Christopher
12/26/2009
Search problems
Hill, Christopher
12/26/2009
End of year reviews
Hill, Christopher
12/26/2009
SharePoint 2010 upgrade
Hill, Christopher; Agarwal, Manoj; Zimprich, Karin; Barnhill, Josh 12/26/2...
Wed 9:00 AM: Weekly Change ...
Today: 3 Tasks
Items: 13
All folders are up to date.
Connected to Microsoft Exchange
100%

Helpdesk Changes

Hill, Christopher

Blue ... | Red C... | Green...

Sent: Sat 12/26/2009 2:23 PM
To: Agarwal, Manoj
Cc: Boyce, Jim

Hi, Manoj. I wanted to check with you about the helpdesk restructuring that was discussed last month. Is that still going to be happening?

- Chris

Figure 5-4 Outlook 2010 can show multiple color categories in the message header to indicate multiple categories.

In the Calendar view, Outlook 2010 displays the item using the last color you assigned and places as many color indicators as it can in the item label. So if you add the Blue, Green, and Red categories, Outlook 2010 colors the item as Red and puts Blue and Green indicators in the item for the Day and Week views. In the Month view, you see only the last color assigned.

To learn how to assign categories to existing items, see the next section, "Assigning Categories to Existing Outlook Items."

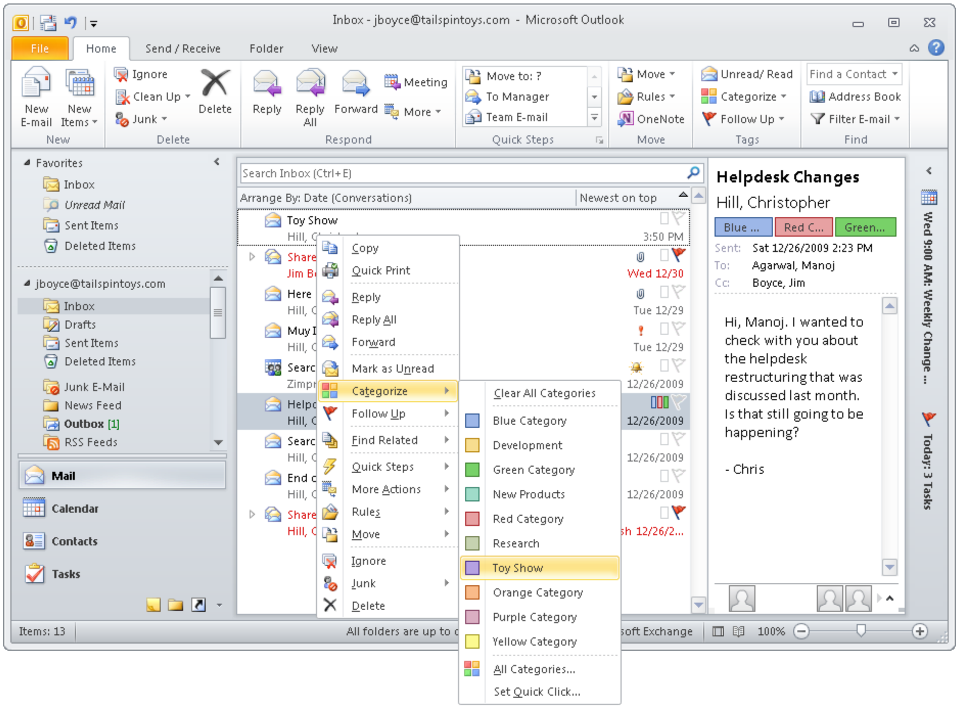
Follow these steps to assign categories to a new item:

1. Open the folder in which you want to create the item, and then click New.
2. Click Categorize in the Tags group on the ribbon. You'll find the Tags group on the first tab of the ribbon, but the tab name changes depending on the type of item that you are working with (Message, Appointment, Event, and so on).
3. Select a single category on the shortcut menu, or click All Categories, and in the Color Categories dialog box, select all the categories that pertain to the item. If you need to add a category, simply click New, type a name, and click OK.
4. Click OK to close the Color Categories dialog box and continue creating the item.

As you can see in step 3, you can create a category on the fly when you're assigning categories to an item. However, a drawback to creating categories on the fly is that you might not enter the category names consistently. As a result, you could end up with a category being given more than one name. As you might expect, Outlook 2010 treats category names literally, so any difference between two names, however minor, makes those categories different. Searching for one won't turn up items assigned to the other.

Assigning Categories to Existing Outlook Items

Often you will want to add categories to existing Outlook 2010 items. For example, you will likely want to categorize email messages after they arrive. The easiest way to assign a category to an existing item is to right-click the item, choose Categorize, and then choose a category from the shortcut menu, as shown in Figure 5-5. You can use this method for any of the Outlook 2010 items.


Inbox - jboyce@tailspintoys.com - Microsoft Outlook
File
Home
Send / Receive
Folder
View
New E-mail
New Items
Ignore
Clean Up
Junk
Delete
Reply
Reply All
Forward
Meeting
More
Move to: ?
To Manager
Team E-mail
Move
Rules
OneNote
Unread/ Read
Categorize
Follow Up
Find a Contact
Address Book
Filter E-mail
New
Delete
Respond
Quick Steps
Move
Tags
Find
Favorites
Inbox
Unread Mail
Sent Items
Deleted Items
jboyce@tailspintoys.com
Inbox
Drafts
Sent Items
Deleted Items
Junk E-Mail
News Feed
Outbox [1]
RSS Feeds
Mail
Calendar
Contacts
Tasks
Search Inbox (Ctrl+E)
Arrange By: Date (Conversations)
Newest on top
Toy Show
3:50 PM
Wed 12/30
Tue 12/29
Tue 12/29
12/26/2009
12/26/2009
12/26/2009
12/26/2009
Copy
Quick Print
Reply
Reply All
Forward
Mark as Unread
Categorize
Follow Up
Find Related
Quick Steps
More Actions
Rules
Move
Ignore
Junk
Delete
Clear All Categories
Blue Category
Development
Green Category
New Products
Red Category
Research
Toy Show
Orange Category
Purple Category
Yellow Category
All Categories...
Set Quick Click...
Blue ...
Red C...
Green...
Wed 9:00 AM: Weekly Change ...
Today: 3 Tasks
Items: 13
All folders are up to d
soft Exchange
100%

Helpdesk Changes

Hill, Christopher

Sent: Sat 12/26/2009 2:23 PM

To: Agarwal, Manoj

Cc: Boyce, Jim

Hi, Manoj. I wanted to check with you about the helpdesk restructuring that was discussed last month. Is that still going to be happening?

- Chris

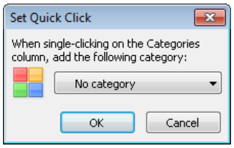
Figure 5-5 Right-click and choose a color category from the shortcut menu.

Assigning a Quick Click Category

Outlook 2010 offers the capability to assign a category quickly, with a single click. In message folders, with the Reading pane displayed on the right, you can click the Category column to assign a Quick Click category. You can also click the Category column on the To-Do Bar to assign a category to tasks in the same way.

Follow these steps to specify the Quick Click category:

1. Click Categorize in the Tags group on the ribbon, and then choose Set Quick Click to open the Set Quick Click dialog box, shown in Figure 5-6.



Set Quick Click

When single-clicking on the Categories column, add the following category:

No category

Figure 5-6. Use the Set Quick Click dialog box to specify the Quick Click category.

2. Select a category, and then click OK.

Assigning Categories Automatically

You can assign categories easily when you create an item, but you might prefer to simplify the process for items that will be assigned to the same category (or set of categories). For example, if you frequently create email messages that have specific category assignments, you could bypass the steps involved in adding the categories to each new message. You can accomplish this by using an email template.

For a detailed discussion of templates, see Chapter 24, "Using Templates."

You can use templates for other Outlook 2010 items as well. Simply create the template, assign categories to it as needed, and then save it with a name that will help you easily identify the category assignments or the function of the template. When you need to create a message with that specific set of category assignments, you can create it from the template rather than from scratch. Because the category assignments are stored in the template, new items created from the template are assigned those categories. Using templates to assign categories not only saves you the time involved in adding categories individually but also ensures that the category assignments are consistent. (For example, you won't misspell a name or forget to add a category.)

A more likely possibility is that you want to add categories to email messages when they arrive. You can create a rule to assign one or more categories to messages when they arrive or even when you send them. For example, let's say you subscribe to six newsletters and you want Outlook 2010 to highlight them in the Inbox with the Green category. A great way to do that is to assign the color category to the messages based on the recipient address or other unique characteristics of the messages.

To learn how to create and manage rules in Outlook 2010, see Chapter 11, "Processing Messages Automatically."

Modifying Categories and Category Assignments

At some point, you'll want to re-categorize Outlook 2010 items—that is, you'll want to add, remove, or modify their category assignments. For example, when one project ends and another begins, some of your contacts will move to a different project, and you'll want to change the categories assigned to the contact items. Perhaps you've added some new categories to organize your data further and want to assign those categories to existing items, or perhaps you made a mistake when you created an item or assigned categories to it, and now you need to make changes. Whatever the case, changing categories and category assignments is easy.

Changing Existing Categories

For one reason or another, you might need to change a category name. You might have misspelled the category when you created it, or you might want to change the wording a little. For example, you might delete the category Foes and create a new one named Friends to replace it (assuming that your friends are not really foes). You can also change existing categories in Outlook 2010. When you change a category, all items assigned to that category are updated.

For example, assume that you have created a category named Dallas Toy Show and made the category red. You open the Inbox and assign the category to several messages. Then you open the calendar and assign the category to a few meetings. A week later, you discover that the toy show is moving to Seattle. So you open the Color Categories dialog box, rename the category Seattle Toy Show, and change the color to blue. When you look in the Inbox, all the messages with that assigned category now show the new name and color. Likewise, the appointments in the calendar also show the new name and color.

If you need to change a category globally rather than add one, see the section "Changing Category Assignments of Multiple Items at One Time," on page 125.

Earlier in this chapter, you learned how to create new categories. Changing a category is much like adding a new one.

Follow these steps to change a category:

1. In Outlook 2010, select any item, and then choose Edit, Categorize, All Categories.
2. In the Color Categories dialog box, click a category to select it.
3. Click Rename, and then type a new name for the category.
4. If you want, select a new color in the Color drop-down list.
5. Click OK to close the Color Categories dialog box.

Changing Category Assignments

You can assign categories to an item at any time, adding and removing the categories you want. To change the categories assigned to a specific item, follow these steps:

1. In Outlook 2010, locate the item for which you want to change the category assignment.
2. Select the item and then click Categorize in the Tags group on the ribbon, or right-click the item and choose Categorize on the shortcut menu.
3. Select a new category in the drop-down list, or choose All Categories to open the Color Categories dialog box, and then assign or remove multiple categories.

Changing Category Assignments of Multiple Items at One Time

In some cases, you'll want to change the category assignments of several items at one time. For example, assume that you've assigned the category Seattle Toy Show to 50 messages in your Inbox. (You really should do a better job of cleaning out your Inbox!) Now you want to clear the categories on all those messages. You could change the messages one at a time, or you could hold down Ctrl, select each message, and then change the category. But for a larger number of items, there is an easier way—the trick is to use a view organized by category. To do this, perform the following steps:

1. Open the folder containing the items whose categories you want to change.
2. Click the View tab, click Change View, and choose List.
3. In the List view, click the Categories tab to organize the view by category.

4. Locate the items under the category that you want to change.
5. If the category that you want to assign to the items has not been assigned yet to any items, assign the category to one item. That item should now show up in the view under its category.
6. Click on the category you are changing, and drag it to the target category.

An important point to understand when using this method to change categories is that Outlook 2010 assigns the target category (the one on which you drop the items) exclusively to the items. For example, assume that you have several items with Red, Blue, and Green category assignments. You drag those items to the Yellow category. All the items now have only the Yellow category. The other categories are removed.

If you want to assign categories to a group of items, you have a couple of different methods to use. If the number of items is relatively small, hold down the Ctrl key, select each item, and then right-click an item and choose Categorize, followed by a category selection. Or choose All Categories to assign multiple new categories.

Note

A list view usually works best when you need to select multiple items.

If you need to change a lot of items, first organize the view by category (to do this, click the View tab on the ribbon, click Change View, choose List, and click the Categories column). Then right-click the category whose items you want to change, choose Categorize, and then choose a new category (or choose All Categories to modify multiple categories). Outlook 2010 displays a warning message informing you that the action will be applied to all items in the selected category. Click OK to continue with the change.

Organizing Data with Categories

Now that you've created your personal category list and faithfully assigned categories to all your data in Outlook 2010, how do you put those categories to work for you? Searching for items with given categories is a good example of how you can use categories to organize and sort your data: by specifying those categories in the Advanced Find dialog box, you can compile a list of items to which those categories have been assigned.

You also can sort items by category. To do so, follow these steps:

1. Open the folder containing the items that you want to sort. If the Categories field isn't displayed, right-click the column bar, and then choose Field Chooser.

2. Drag the Categories field to the column bar, and then close the Field Chooser dialog box.
3. Right-click the Categories column, and then choose Group By This Field.

Tip

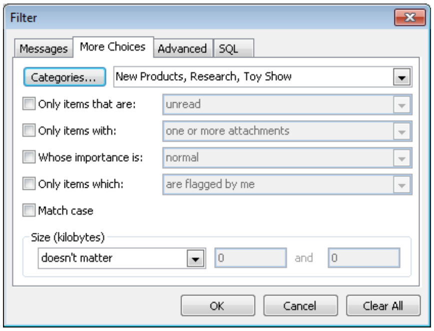
To clear groupings, right-click the Categories column in the Group By box, and choose Don't Group By This Field.

Viewing Selected Categories Only

In many situations, it's beneficial to be able to restrict a view to show only selected categories. For example, perhaps you want to view all messages that have the Toy Show and Travel Required categories. Whatever the case, you can use a couple of methods to view only items with specific category assignments.

First, you can use a custom, filtered view to filter only those items that fit your criteria. Follow these steps to customize a view to show selected categories:

1. Open the Outlook 2010 folder that contains the items you want to view.
2. On the View tab of the ribbon, click View Settings in the Current View group.
3. In the Advanced View Settings dialog box, click Filter.
4. In the Filter dialog box, click the More Choices tab, as shown in Figure 5-7.



Categories... New Products, Research, Toy Show

☐ Only items that are: unread

☐ Only items with: one or more attachments

☐ Whose importance is: normal

☐ Only items which: are flagged by me

☐ Match case

Size (kilobytes)

doesn't matter 0 and 0

Figure 5-7. Use the More Choices tab in the Filter dialog box to create a custom view.

5. On the More Choices tab, click Categories, select the categories that you want to view, and then click OK.
6. Click OK in the Filter dialog box, and then click OK in the Customize View dialog box to view the filtered view.

See Chapter 26, "Creating Custom Views and Print Styles," to learn more about working with custom views.

Another way to view items with only selected categories, provided you are working with a mail folder, is a search folder. You can create a new search folder that shows only messages in the desired categories. Follow these steps to create the search folder:

1. Right-click Search Folders in the folder list (Navigation Pane), and then choose New Search Folder. Or click the arrow next to New on the Standard toolbar, and then choose Search Folder.
2. In the New Search Folder dialog box, shown in Figure 5-8, scroll to the bottom of the list, select Create A Custom Search Folder, and then click Choose.

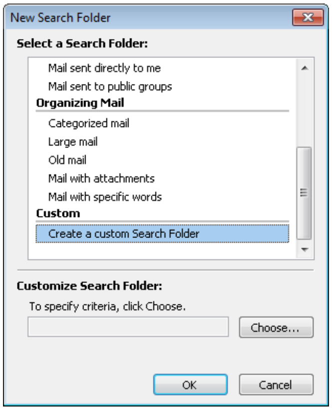
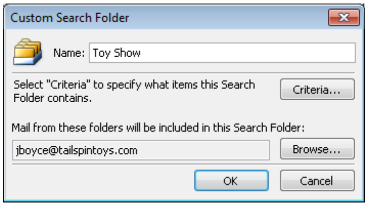

New Search Folder
Select a Search Folder:
Mail sent directly to me
Mail sent to public groups
Organizing Mail
Categorized mail
Large mail
Old mail
Mail with attachments
Mail with specific words
Custom
Create a custom Search Folder
Customize Search Folder:
To specify criteria, click Choose.
Choose...
OK
Cancel

Figure 5-8. Create a custom search folder in the New Search Folder dialog box.

3. In the Custom Search Folder dialog box, shown in Figure 5-9, type a name for the search folder in the Name field.



Custom Search Folder

Name: Toy Show

Select "Criteria" to specify what items this Search Folder contains.

Mail from these folders will be included in this Search Folder:

jboyce@tailspintoys.com

Figure 5-9. Specify properties in the Custom Search Folder dialog box.

4. Click Criteria to open the Search Folder Criteria dialog box, and then click More Choices.
5. Click Categories, and then select the categories to include in the search folder.
6. Click OK twice to return to the Custom Search Folder dialog box.
7. Click Browse, select the folders to be included in the search, and then click OK.
8. Click OK in the Custom Search Folder dialog box, and then click OK to close the New Search Folder dialog box.

See Chapter 10, "Finding and Organizing Messages," to learn more about creating and using search folders.

Sharing a Category List

If you work in a department, or if you share similar tasks and responsibilities with others, it's helpful to be able to share the same set of categories with those other users. Doing so helps to ensure that everyone is using the same categories, an important point when you're sharing items or receiving items from others that have categories assigned to them. For example, assume that your department is working on a handful of projects. Having everyone use the same project category names helps you organize your Outlook 2010 items and ensures that searches or sorts based on a given project display all items related to the project, including those you've received from others.

Sharing Categories with a Registry File

Outlook 2010 stores your category list in the Calendar folder as a hidden Outlook 2010 item, not in a file. This means that you can't simply share a file to share your categories. Instead, you can create a registry file to share categories.

CAUTION!

An incorrect modification to the registry can prevent Outlook 2010 from running or could even prevent Microsoft Windows from starting. Be careful when editing the registry.

These steps outline the registry method, which copies categories into the registry:

1. Open Notepad, and then add the following text to the file:

   ```
   Windows Registry Editor Version 5.00

   [HKEY_CURRENT_USER\Software\Microsoft\Office\14.0\Outlook\Preferences]
   “NewCategories”=”Toy Show;New Products;Research”
   ```

2. In the text string, replace “Toy Show;New Products;Research” with your own category names, separating each category from the next with a semicolon.
3. Save the file with a .reg file name extension, and then close Notepad.

At this point, you have a registry file that other Outlook 2010 users can use to import the category list into their systems. Place the .reg file on a network share where the other users can access it, or share it on a CD, a universal serial bus (USB) drive, or other media. Then have the other users simply double-click the file to add the categories to their registry.

Sharing Categories with Email

Another (and perhaps safer) way to share categories is through email. By default, Outlook 2010 strips categories out of incoming messages so that they are not added automatically to your category list. Outlook 2010 uses a rule to enforce this behavior. If you turn off the rule, categories arrive with incoming messages. However, only the category text arrives; the color is set to None for these categories, but you can modify the categories to add your own colors.

Follow these steps to turn off the rule:

1. With the Mail folder open, click Rules on the Home tab, and then click Manage Rules And Alerts.
2. In the Rules And Alerts dialog box, clear the Clear Categories On Mail rule.
3. Click OK.

Note

In Microsoft Exchange Server 2007 and later, Clear Categories is enabled by default and is controlled by the server administrator, so the Clear Categories On Mail rule does not appear in the Rules And Alerts dialog box for Exchange Server accounts. See the Exchange Server Help documentation for the Set-TransportConfig command to learn how to enable and disable Clear Categories for Exchange Server 2007 and later.

With the rule turned off on the recipients' systems, you can now create a message, assign to it all the categories that you want to share, and then send the message. Follow these steps to add the categories to the outgoing message:

1. Start a new message.
2. In the message form, click the small arrow in the Tags area on the Message tab.
3. In the Properties dialog box, click Categories, and then assign categories to the message as desired.
4. Close the Message Options dialog box, and then send the message.

Note

You can use two registry settings to control whether Outlook 2010 will strip out categories for outgoing and incoming messages. These settings reside in HKEY_CURRENT_USER\Software\Microsoft\Office\14.0\Outlook\Preferences (although the settings do not exist by default). The setting AcceptCategories controls incoming messages, and the setting SendPersonalCategories controls outgoing messages.

Using Categories Effectively

The addition of color categories in Outlook 2010 makes categories even more useful and extends the ways that you can use categories to manage your schedule, messages, and other items in Outlook 2010. Like most Outlook 2010 features, categories are not useful in and of themselves—it's how you use them that makes them useful. Here are several tips for using categories effectively:

- **Create your categories first** By creating your category list up front before you start assigning categories, you force yourself to take the time to think about what categories you need and how you will use them. What makes sense for someone else might not fit your needs, and vice versa. This doesn't mean that you can't add categories after the fact or change the way that you use categories, but some planning up front will help ensure that you get the most out of categorization.

- **Use categories in combination with folders to organize messages** Categories offer an excellent means for you to organize your Outlook 2010 data. Some people use folders to organize their messages; others use categories exclusively to manage their messages, keeping everything in the Inbox but assigning categories so that they can identify messages quickly. The best approach falls in between these two options, with a combination of folders and categories. Use categories to classify messages, but also use folders to organize those messages. For example, you might create a folder named Toy Show to store all messages relating to the upcoming toy show and then use categories to further classify messages in that folder.

- **Use search folders in combination with categories** After you have categorized your messages, you can use search folders to locate all messages with specified categories quickly. Search folders give you the benefit of potentially searching all your message folders for specific items, enabling you to locate all items with a specific category quickly, regardless of where they are stored. Take some time to consider which search folders will best suit your needs, and then create them.

- **Rely on colors to help you visually identify items** Although you can create categories with no color, color will help you tell at a glance that a given message, appointment, or other item fits a specific category. For example, you might color all your important meetings in red, personal appointments in green, and optional appointments or meetings in yellow. The ability to tell at a glance what an item is will help improve your productivity and effectiveness.

- **Assign color categories to messages using rules** Although you can certainly assign colors to messages manually, you should also take advantage of rules to assign categories for you automatically. For example, you might categorize messages from specific senders so that you can identify them easily in your Inbox, or use categories to identify messages from mailing lists, friends, and so on.

- **Identify your most commonly used category** Determine which category you use the most, and define that category as your Quick Click category. You can then assign that category with a single click of the mouse.

CHAPTER 16

Using RSS Feeds

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Microsoft Outlook 2010, like Outlook 2007 before it, supports Really Simple Syndication (RSS)—a feature that gives the ability to integrate external information provided by content publishers (such as news websites) into a folder in Outlook 2010. The information is transmitted in a particular Extensible Markup Language (XML) format (described as an *RSS feed*). To use this information, you configure Outlook 2010 to subscribe to the RSS feeds that provide the stories or information that you want. These stories (or other RSS-provided information) are stored in a feed-specific folder under the RSS Feeds folder in Outlook 2010.

Understanding RSS

RSS is essentially an XML-based means to format news stories and other dynamically changing Web content so that RSS-aware software applications can access and retrieve this content automatically. Many web browsers, such as Windows Internet Explorer, have a built-in RSS-aware component (sometimes called a *news aggregator* or a *news reader*) that can connect to RSS feed locations and retrieve RSS-formatted content. Using such a feed in Outlook 2010 is easy, because you simply paste in the Uniform Resource Locator (URL) to the RSS feed that you want to retrieve, and Outlook 2010 takes care of the rest.

RSS is also referred to as *web content syndication*, where users subscribe to the content that they want from news sites (and other websites providing dynamic information). In this case, a subscription is not like signing up for a newsletter, where you have to provide an email address for the information to be sent to. Rather, to subscribe to RSS feeds, you only have to locate the URL for the specific feed that you want and configure your RSS reader (in this case, Outlook 2010) to connect to that URL. The RSS reader will retrieve the information (news articles, or other dynamic content) automatically from the site.

Note

Some RSS feeds might require you to log in to an account with a user name and password to retrieve the RSS feed.

Configuring RSS

Setting up RSS feeds in Outlook 2010 is very easy to do—simply decide which sites you want to get RSS feeds from, determine the appropriate URL for the RSS feed from that site, and provide that URL to Outlook 2010. Each website creates its own URL format for delivering RSS content. Consider the following examples of RSS feed URLs:

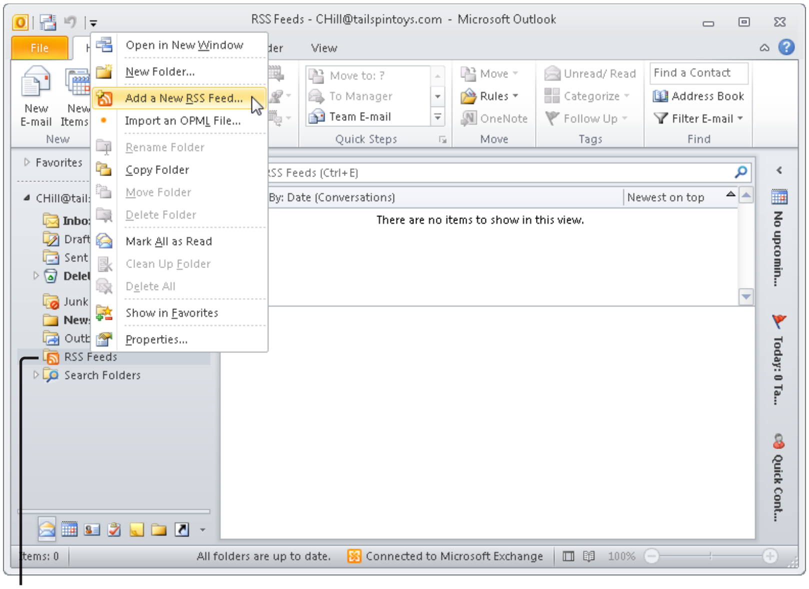
- **MSDN Web site** *msdn.microsoft.com/rss.xml*
- **Seattle Times** *seattletimes.nwsource.com/rss/home.xml*
- **Google News** *news.google.com/nwshp?hl=en&tab=wn&q=&output=rss*
- **CNN Top Stories** *rss.cnn.com/rss/cnn_topstories.rss*

Adding RSS Feeds to Outlook

To add a new RSS feed from a site to your Outlook 2010 RSS Feeds folder, you will first have to determine the appropriate URL for the site or for the specific feed from the site (as many sites have more than one RSS feed). Typically, RSS feeds are indicated by an RSS feed icon on the page.

To add a new RSS feed to Outlook 2010, do the following:

1. Right-click the RSS Feeds folder in the Navigation pane, and then select Add A New RSS Feed, as shown in Figure 16-1.

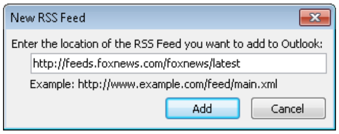

RSS Feeds - CHill@tailspintoys.com - Microsoft Outlook
File
Open in New Window
New Folder...
Add a New RSS Feed...
Import an OPML File...
Rename Folder
Copy Folder
Move Folder
Delete Folder
Mark All as Read
Clean Up Folder
Delete All
Show in Favorites
Properties...
View
New E-mail
New Items
New
Move to: ?
To Manager
Team E-mail
Quick Steps
Move
Rules
OneNote
Move
Unread/ Read
Categorize
Follow Up
Tags
Find a Contact
Address Book
Filter E-mail
Find
Favorites
CHill@tail
Inbo
Draft
Sent
Delet
Junk
New
Outb
RSS Feeds
Search Folders
RSS Feeds (Ctrl+E)
By: Date (Conversations)
Newest on top
No upcomin...
Today: 0 Ta...
Quick Cont...
Items: 0
All folders are up to date.
Connected to Microsoft Exchange
100%

There are no items to show in this view.

Right-click

Figure 16-1 Right-click the RSS Feeds folder to begin adding a new feed.

2. The New RSS Feed dialog box is displayed, as shown in Figure 16-2. This is the location to type (or paste) the URL of the RSS feed that you want to add. In this example, the URL for the MSDN Web site RSS feed is used. Click Add to add the URL of the new RSS feed.


New RSS Feed
Add
Cancel

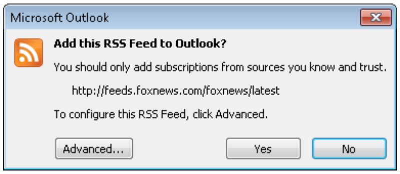
Enter the location of the RSS Feed you want to add to Outlook:

http://feeds.foxnews.com/foxnews/latest

Example: http://www.example.com/feed/main.xml

Figure 16-2 Enter the URL of the new RSS feed that you want to add.

3. You are then asked to confirm whether to add this URL as a new RSS feed and warned that you should add RSS feeds only from sources that you trust, as shown in Figure 16-3. Clicking Yes adds the RSS feed using default values.



Add this RSS Feed to Outlook?

You should only add subscriptions from sources you know and trust.

http://feeds.foxnews.com/foxnews/latest

To configure this RSS Feed, click Advanced.

Figure 16-3 A verification is requested, with an Advanced option for additional control over the RSS feed.

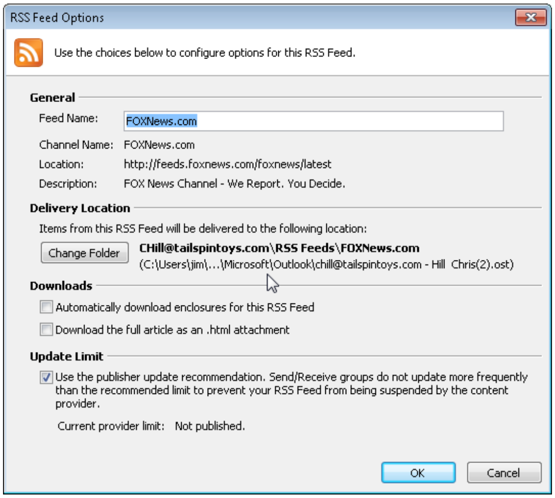
4. Click Advanced to access further control over the RSS feed. Once the site is accessed, the RSS Feed Options dialog box is displayed, as shown in Figure 16-4, enabling you to change the following aspects of the RSS feed:

   - **General** The General area displays the name of the feed (as shown in Outlook 2010), the Channel Name, the Location (the URL entered to access the RSS feed), and the Description provided by the RSS feed source. The Feed Name box lets you change the name of the feed displayed in the Outlook 2010 RSS Feeds folder.

   - **Delivery Location** The Delivery Location area displays the location within the Outlook 2010 mailbox as well as the path on the drive and the file name of the Outlook 2010 data file storing the folder. Clicking the Change Folder button in this area opens the New RSS Feed Delivery Location dialog box, which lets you create a new folder or select a new Outlook 2010 data file to store the RSS feeds in.

   - **Downloads** The Downloads area includes two options specifying how Outlook 2010 deals with downloading RSS information (both are not selected by default): The Automatically Download Enclosures For This Feed option enables the automatic downloading of attachments connected to articles in this feed. The Download The Full Article As An .html Attachment To Each Item option instructs Outlook 2010 to handle the articles in this RSS feed automatically by downloading the complete articles as .html attachments.

   - **Update Limit** The Update This Feed With The Publisher's Recommendation check box in the Update Limit area (selected by default) sets the timing of updates to the RSS feed to be controlled by the publisher, using the update time specified by the source of the RSS feed.



Use the choices below to configure options for this RSS Feed.

General

Feed Name: FOXNews.com

Channel Name: FOXNews.com

Location: http://feeds.foxnews.com/foxnews/latest

Description: FOX News Channel - We Report. You Decide.

Delivery Location

Items from this RSS Feed will be delivered to the following location:

CHill@tailspintoys.com\RSS Feeds\FOXNews.com
(C:\Users\jim\...\Microsoft\Outlook\chill@tailspintoys.com - Hill Chris(2).ost)

Downloads

☐ Automatically download enclosures for this RSS Feed

☐ Download the full article as an .html attachment

Update Limit

☑ Use the publisher update recommendation. Send/Receive groups do not update more frequently than the recommended limit to prevent your RSS Feed from being suspended by the content provider.

Current provider limit: Not published.

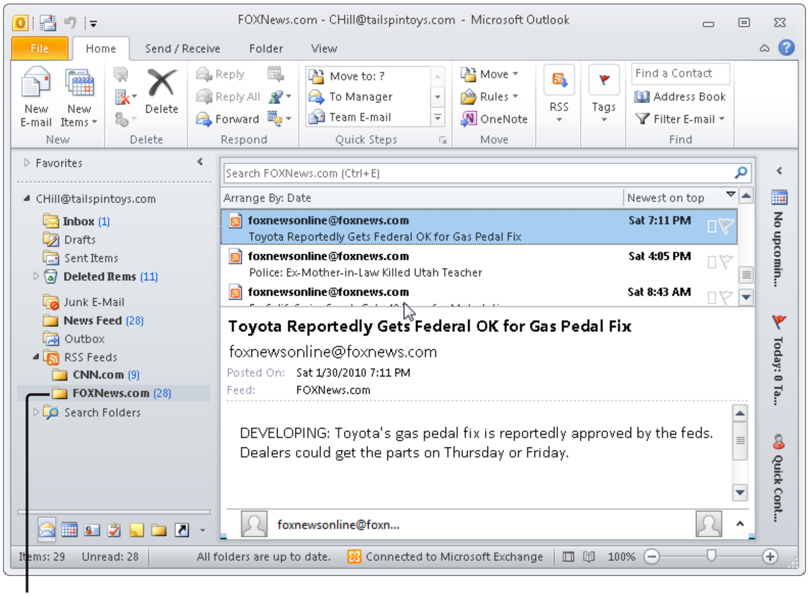
Figure 16-4 The RSS Feed Options dialog box lets you set the name, location, and update limit as well as control what is downloaded in the RSS feed.

5. After you have completed setting the options in the RSS Feed Options dialog box, click OK to return to the confirmation dialog box shown in Figure 16-3. Click Yes to confirm the addition of the RSS feed.

Using Your RSS Feeds

After the RSS feeds have been added, you can begin to use them to access the information provided in the feed. To get to the RSS-provided information, click the Folder icon at the bottom of the Navigation pane and then scroll down to the RSS Feeds folder. The feeds that you have configured will appear under the RSS Feeds folder, as shown in Figure 16-5, and will display the title of the feed and the number of unread articles in parentheses following the title.

Selecting the specific RSS feed that you are interested in will display the list of articles. Selecting a specific article will display the summary of the article in the Reading pane with links to the complete article. You can right-click the item and choose Download Content, Download Article. Outlook downloads the article, which then appears as a Hypertext Markup Language (HTML) attachment to the item (see Figure 16-6). Double-click the attachment to view the item in your browser. If you have already downloaded the item, right-click it and choose Download Content, Update Article to get an updated copy of the item.


FOXNews.com - CHill@tailspintoys.com - Microsoft Outlook
File
Home
Send / Receive
Folder
View
New E-mail
New Items
New
Delete
Reply
Reply All
Forward
Respond
Move to: ?
To Manager
Team E-mail
Quick Steps
Move
Rules
OneNote
RSS
Tags
Find a Contact
Address Book
Filter E-mail
Find
Favorites
CHill@tailspintoys.com
Inbox (1)
Drafts
Sent Items
Deleted Items (11)
Junk E-Mail
News Feed (28)
Outbox
RSS Feeds
CNN.com (9)
FOXNews.com (28)
Search Folders
Search FOXNews.com (Ctrl+E)
Arrange By: Date
Newest on top
No upcomin...
Today: 0 Ta...
Quick Cont...
Items: 29
Unread: 28
All folders are up to date.
Connected to Microsoft Exchange
100%

foxnewsonline@foxnews.com Sat 7:11 PM
Toyota Reportedly Gets Federal OK for Gas Pedal Fix

foxnewsonline@foxnews.com Sat 4:05 PM
Police: Ex-Mother-in-Law Killed Utah Teacher

foxnewsonline@foxnews.com Sat 8:43 AM

Toyota Reportedly Gets Federal OK for Gas Pedal Fix

foxnewsonline@foxnews.com

Posted On: Sat 1/30/2010 7:11 PM

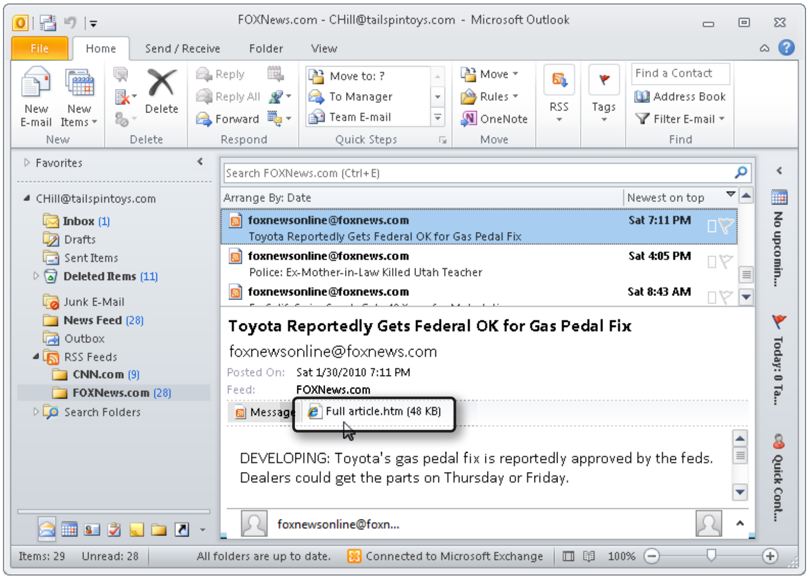
Feed: FOXNews.com

DEVELOPING: Toyota's gas pedal fix is reportedly approved by the feds. Dealers could get the parts on Thursday or Friday.

foxnewsonline@foxn...

Selected RSS feed

Figure 16-5 Selecting a particular RSS feed displays a list of downloaded articles from that site.


FOXNews.com - CHill@tailspintoys.com - Microsoft Outlook
File
Home
Send / Receive
Folder
View
New E-mail
New Items
New
Delete
Reply
Reply All
Forward
Respond
Move to: ?
To Manager
Team E-mail
Quick Steps
Move
Rules
OneNote
RSS
Tags
Find a Contact
Address Book
Filter E-mail
Find
Favorites
CHill@tailspintoys.com
Inbox (1)
Drafts
Sent Items
Deleted Items (11)
Junk E-Mail
News Feed (28)
Outbox
RSS Feeds
CNN.com (9)
FOXNews.com (28)
Search Folders
Search FOXNews.com (Ctrl+E)
Arrange By: Date
Newest on top
Message
Full article.htm (48 KB)
No upcomin...
Today: 0 Ta...
Quick Cont...
Items: 29
Unread: 28
All folders are up to date.
Connected to Microsoft Exchange
100%

foxnewsonline@foxnews.com Sat 7:11 PM
Toyota Reportedly Gets Federal OK for Gas Pedal Fix

foxnewsonline@foxnews.com Sat 4:05 PM
Police: Ex-Mother-in-Law Killed Utah Teacher

foxnewsonline@foxnews.com Sat 8:43 AM

Toyota Reportedly Gets Federal OK for Gas Pedal Fix

foxnewsonline@foxnews.com

Posted On: Sat 1/30/2010 7:11 PM

Feed: FOXNews.com

DEVELOPING: Toyota's gas pedal fix is reportedly approved by the feds. Dealers could get the parts on Thursday or Friday.

foxnewsonline@foxn...

Figure 16-6 A downloaded item appears as an .html attachment to the item.

You can also click the View Article link in the item if you simply want to open a browser to display the item from its website.

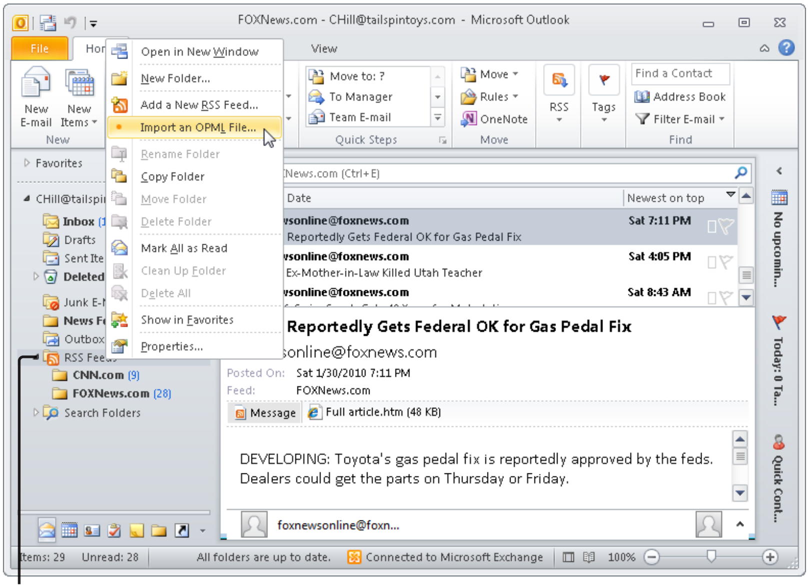
You can perform common message-oriented actions on RSS feed messages. For example, you can forward them, mark them as read or unread, categorize them, apply Quick Steps to them, and so on, just as you can for other types of messages in a message folder.

Adding an OPML File to Outlook

Outline Processor Markup Language (OPML) is a popular means of exchanging lists of RSS feeds, enabling sites to provide a set of RSS feeds to subscribers in a single file. OPML is another XML-based format, one specifically designed to handle information structured as an outline, yet it also has been successfully used to handle lists of RSS feeds.

To add an OPML-based list of RSS feeds to Outlook 2010, follow these steps:

1. Right-click the RSS Feeds folder in the Navigation pane, and then choose Import An OPML File, as shown in Figure 16-7.

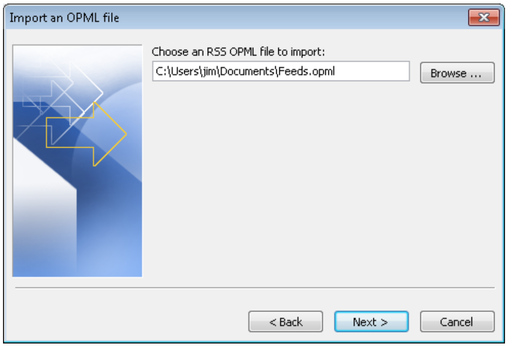

FOXNews.com - CHill@tailspintoys.com - Microsoft Outlook
File
Hom
View
New E-mail
New Items
New
Open in New Window
New Folder...
Add a New RSS Feed...
Import an OPML File...
Rename Folder
Copy Folder
Move Folder
Delete Folder
Mark All as Read
Clean Up Folder
Delete All
Show in Favorites
Properties...
Move to: ?
To Manager
Team E-mail
Quick Steps
Move
Rules
OneNote
Move
RSS
Tags
Find a Contact
Address Book
Filter E-mail
Find
Favorites
CHill@tailspi
Inbox
Drafts
Sent Ite
Deleted
Junk E-
News F
Outbox
RSS Feeds
CNN.com (9)
FOXNews.com (28)
Search Folders
News.com (Ctrl+E)
Date
Newest on top
sonline@foxnews.com
Sat 7:11 PM
Reportedly Gets Federal OK for Gas Pedal Fix
sonline@foxnews.com
Sat 4:05 PM
Ex-Mother-in-Law Killed Utah Teacher
sonline@foxnews.com
Sat 8:43 AM
No upcomin...
Today: 0 Ta...
Quick Cont...
Reportedly Gets Federal OK for Gas Pedal Fix
sonline@foxnews.com
Posted On: Sat 1/30/2010 7:11 PM
Feed: FOXNews.com
Message
Full article.htm (48 KB)
foxnewsonline@foxn...
Items: 29
Unread: 28
All folders are up to date.
Connected to Microsoft Exchange
100%

DEVELOPING: Toyota's gas pedal fix is reportedly approved by the feds. Dealers could get the parts on Thursday or Friday.

Right-click

Figure 16-7 Importing a list of RSS feeds via an OPML file.

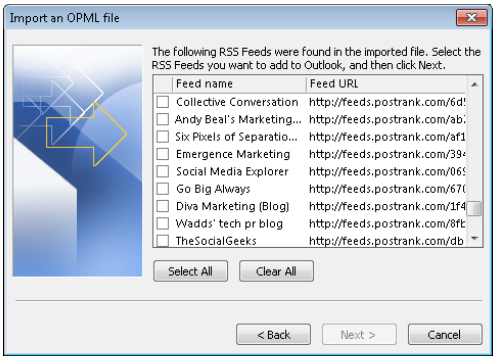
2. The Import An OPML File Wizard is displayed, as shown in Figure 16-8. Browse to the location on your computer or network that contains the OPML file with the list of RSS feeds, select the file, and then click OK.



Choose an RSS OPML file to import:
C:\Users\jim\Documents\Feeds.opml

Figure 16-8 Select the OPML file containing the RSS feeds.

3. After selecting the OPML file, the Import An OPML File wizard displays a list of RSS feeds that the OPML file contains, as shown in Figure 16-9, and enables the selection of each RSS feed to be added to your Outlook 2010 RSS Feeds folder. Select each desired RSS feed in the list by clicking the check box next to the feed (or click the Select All button to select all of them). After you have selected all the RSS feeds that you want, click Next.



The following RSS Feeds were found in the imported file. Select the RSS Feeds you want to add to Outlook, and then click Next.

	Feed name	Feed URL
☐	Collective Conversation	http://feeds.postrank.com/6d
☐	Andy Beal's Marketing...	http://feeds.postrank.com/ab
☐	Six Pixels of Separatio...	http://feeds.postrank.com/af1
☐	Emergence Marketing	http://feeds.postrank.com/39
☐	Social Media Explorer	http://feeds.postrank.com/06
☐	Go Big Always	http://feeds.postrank.com/67
☐	Diva Marketing (Blog)	http://feeds.postrank.com/1f4
☐	Wadds' tech pr blog	http://feeds.postrank.com/8f
☐	TheSocialGeeks	http://feeds.postrank.com/db

Figure 16-9 Choose the RSS feeds to import.

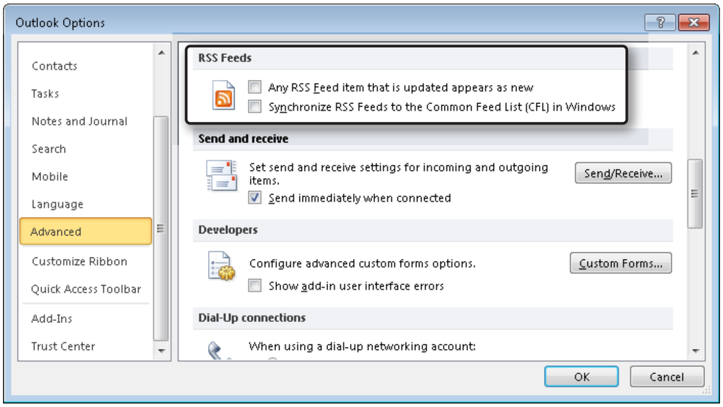
4. Click Finish to return to Outlook 2010, and then go to the RSS Feeds folder to review the new RSS feeds added through the OPML file.

Managing Your RSS Feeds

Once you have your RSS feeds set up, you might want to change aspects of how the RSS feeds are configured, such as changing the URL that the RSS feed is derived from, changing how it downloads enclosures, or changing how other users can access a particular RSS feed on your computer.

You can configure options for controlling RSS feeds in Outlook 2010 in several ways. To control how Outlook 2010 handles all RSS feeds, click File, Options, and then click Advanced to display the Advanced page of the Options dialog box, shown in Figure 16-10. On this page, you'll find the following two options that affect RSS feeds:

- **Synchronize RSS Feeds To The Common Feed List (CFL) In Windows** If this option is enabled, feeds that you add in Outlook are synchronized to a common feed list (CFL) available to Internet Explorer 7 or later, as well as other programs that can use the CFL. Likewise, feeds that you add from IE are added to Outlook automatically.
- **Any RSS Feed Item That Is Updated Appears As New** If an item has been updated, Outlook marks it as unread again.


Outlook Options
Contacts
Tasks
Notes and Journal
Search
Mobile
Language
Advanced
Customize Ribbon
Quick Access Toolbar
Add-Ins
Trust Center
Send/Receive...
Custom Forms...
OK
Cancel

RSS Feeds

☐ Any RSS Feed item that is updated appears as new

☐ Synchronize RSS Feeds to the Common Feed List (CFL) in Windows

Send and receive

Set send and receive settings for incoming and outgoing items.

☑ Send immediately when connected

Developers

Configure advanced custom forms options.

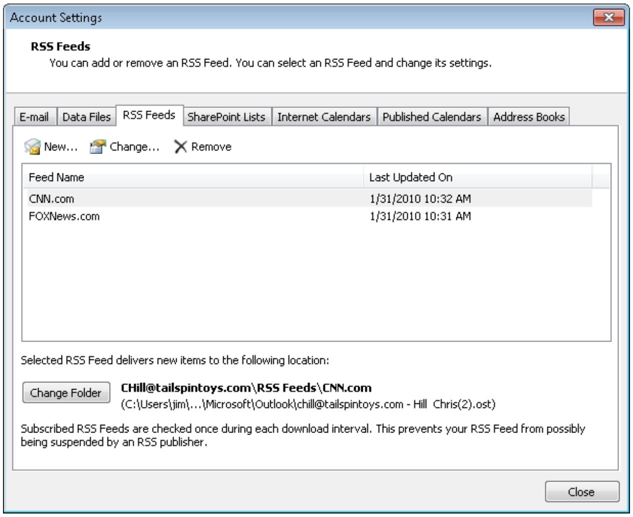
☐ Show add-in user interface errors

Dial-Up connections

When using a dial-up networking account:

Figure 16-10 Configure the handling of RSS feed items and synchronization on the Advanced page of the Options dialog box.

To change the configuration of an RSS feed once it has been set up, click File, Account Settings, and then choose Account Settings. In the Account Settings dialog box, click the RSS Feeds tab, shown in Figure 16-11, select the RSS feed that you want to modify, and then click Change.



RSS Feeds

You can add or remove an RSS Feed. You can select an RSS Feed and change its settings.

Feed Name	Last Updated On
CNN.com	1/31/2010 10:32 AM
FOXNews.com	1/31/2010 10:31 AM

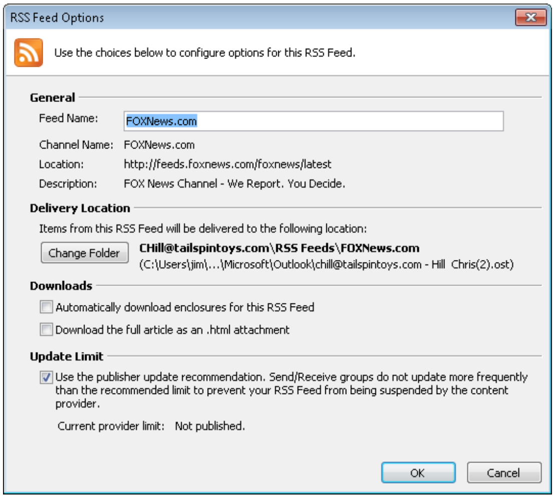
Selected RSS Feed delivers new items to the following location:

CHill@tailspintoys.com\RSS Feeds\CNN.com
(C:\Users\jim\…\Microsoft\Outlook\chill@tailspintoys.com - Hill Chris(2).ost)

Subscribed RSS Feeds are checked once during each download interval. This prevents your RSS Feed from possibly being suspended by an RSS publisher.

Figure 16-11 Select the RSS Feeds tab to change an RSS feed configuration.

The name of the RSS feed can be modified in the RSS Feed Options dialog box, shown in Figure 16-12, and the Channel Name, Location, and Description are displayed. You can change the mailbox folder as well as the mail storage file in which the RSS feed is contained by clicking Change Folder. The Downloads area includes controls for how RSS downloads are handled, including the Automatically Download Enclosures For This RSS Feed and the Download The Full Article As An .html Attachment To Each Item options. Although the Update Limit option to use the publisher’s recommendation for update frequency is selected, this option can be disabled, allowing you to update the feed manually. For more information about configuring these options, see the section “Adding RSS Feeds to Outlook,” on page 410**.**



Use the choices below to configure options for this RSS Feed.

General

Feed Name: FOXNews.com

Channel Name: FOXNews.com

Location: http://feeds.foxnews.com/foxnews/latest

Description: FOX News Channel - We Report. You Decide.

Delivery Location

Items from this RSS Feed will be delivered to the following location:

CHill@tailspintoys.com\RSS Feeds\FOXNews.com
(C:\Users\jim\...\Microsoft\Outlook\chill@tailspintoys.com - Hill Chris(2).ost)

Downloads

☐ Automatically download enclosures for this RSS Feed

☐ Download the full article as an .html attachment

Update Limit

☑ Use the publisher update recommendation. Send/Receive groups do not update more frequently than the recommended limit to prevent your RSS Feed from being suspended by the content provider.

Current provider limit: Not published.

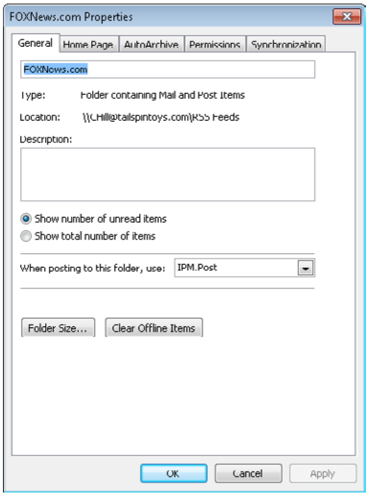
Figure 16-12 The RSS Feed Options dialog box lets you control the name, the storage location, and how the RSS download is managed.

You can also enable or disable downloads in RSS feeds in the Trust Center, on the Automatic Downloads page, where you can select or clear the Permit Downloads In RSS Items check box.

Setting RSS Properties

A core set of configuration controls for RSS feeds is available on the Properties dialog box accessible in the RSS Feeds folder (and all RSS folders created under it). To set these RSS configuration options, right-click the RSS Feeds folder (or the desired subfolder), and then choose Properties. Note that only a few of the tabs are applicable to RSS feeds, and those tabs are the ones described in this section.

The General tab, as shown in Figure 16-13, enables you to set the name of the RSS folder and the description, as well as whether to display the number of all items or just unread items. In addition, you can configure the form used in posting to the RSS folder, and display the folder size (on both the local computer and the server). Clicking Clear Offline Items removes the data from the offline data store.


FOXNews.com Properties
General
Home Page
AutoArchive
Permissions
Synchronization
Folder Size...
Clear Offline Items
OK
Cancel
Apply

FOXNews.com

Type: Folder containing Mail and Post Items

Location: \\CHill@tailspintoys.com\RSS Feeds

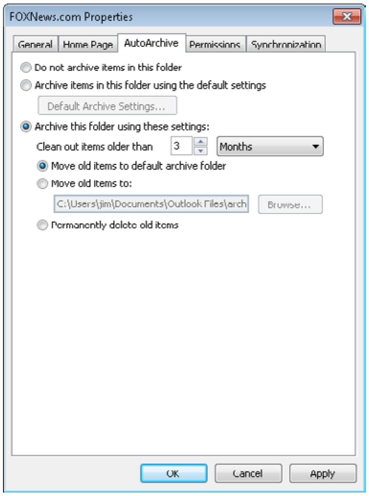
Description:

● Show number of unread items
○ Show total number of items

When posting to this folder, use: IPM.Post

Figure 16-13 The General tab of the RSS Feeds Properties dialog box enables setting RSS folder properties.

To control the archiving of RSS feeds, you select the AutoArchive tab in the RSS Feeds Properties dialog box, shown in Figure 16-14, and then configure the archiving settings to your preference. The default is not to archive the RSS items, but you can configure the Archive This Folder Using These Settings option to set the time limit (the point at which Outlook 2010 cleans out items older than the set period). After you have set the archive time limit, you can configure where archived items are moved.


FOXNews.com Properties
General
Home Page
AutoArchive
Permissions
Synchronization
Default Archive Settings...
Browse...
OK
Cancel
Apply

○ Do not archive items in this folder
○ Archive items in this folder using the default settings
● Archive this folder using these settings:
  Clean out items older than 3 Months
  ● Move old items to default archive folder
  ○ Move old items to:
  C:\Users\jim\Documents\Outlook Files\arch
  ○ Permanently delete old items

Figure 16-14 Set the archive option, time limit, and archive location for this RSS feed.

The Synchronization tab lets you set the synchronization filter for the RSS feed. Click Filter to display the Filter dialog box, and then select the filter criteria to apply to the offline copy of the RSS items associated with this folder.

Creating Rules for RSS Feeds

Outlook includes a couple of rule conditions that you can use to create rules for your RSS feeds. For example, even though the messages for a given RSS feed arrive in their own folder by default, you might want those messages moved to a different folder; or perhaps you are watching a particular topic and want items related to that topic to pop into your Inbox, where you will see them right away.

You create a rule for RSS items in the same way that you create them for other message items, such as searching for text in the body or subject. There are two RSS-specific conditions you can use as well:

- **From RSS Feeds With The Specified Text In The Title** Use this condition to process RSS items that come from a specific feed, searching for the feed name in the title.
- **From Any RSS Feed** Use this condition to process all RSS feed items.

For other RSS processing, use the conditions that you would normally use for message items. For example, if you want to track a specific topic, use the With Specific Words In The Subject Or Body condition, and then specify the topic word or phrase in the rule’s condition. Then, provide the applicable action, such as moving the item to your Inbox.

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