

plain  
&  
simple



Microsoft®  
**Outlook® 2010**

Your easy, colorful, SEE-HOW guide to Outlook!

Jim Boyce

**Microsoft®**

Microsoft®

# Outlook® 2010 Plain & Simple

*Jim Boyce*

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Printed and bound in the United States of America.

ISBN: 978-0-7356-2734-5

4 5 6 7 8 9 10 11 12 QG 8 7 6 5 4 3

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# Contents

<i>Acknowledgments</i> .....	ix
------------------------------	----

## 1

### **Introduction: About This Book** **1**

---

No Computerspeak! .....	1
A Quick Overview .....	2
A Few Assumptions .....	4
A Final Word (or Two) .....	4

## 2

### **What's New in Outlook 2010?** **5**

---

A New Interface .....	6
E-mail Changes .....	13
Calendar Changes .....	16
People and Presence .....	21
Search .....	24
Mobility .....	26

## 3

### **Getting Started** **29**

---

Outlook 2010 at a Glance .....	30
Starting and Exiting Outlook .....	32
Exploring Outlook Folders .....	33
Working with Outlook Items .....	34
Setting Up E-Mail Accounts .....	36
Importing Data from Another Program .....	40
Viewing Items and Folders .....	43
Getting Help in Outlook 2010 .....	46

# 4

## Writing and Sending E-Mail 47

---

Writing an E-Mail Message . . . . .	48
Working with the Address Book . . . . .	50
Working with Contact Groups . . . . .	52
Changing a Message Before Sending . . . . .	55
Formatting Message Text . . . . .	57
Using Signatures . . . . .	59
Working with HTML Stationery . . . . .	62
E-Mailing a File . . . . .	64
Sending Messages . . . . .	66
Reviewing Sent Messages and Drafts . . . . .	68

# 5

## Receiving and Reading E-Mail 71

---

Receiving E-Mail . . . . .	72
Reading E-Mail . . . . .	74
Managing the Inbox Folder . . . . .	76
Working with Attachments . . . . .	79
Replying To and Forwarding E-Mail . . . . .	81
Handling Junk Mail . . . . .	83
Working with the Rules Wizard . . . . .	86
Following Up on a Message . . . . .	89

# 6

## Using RSS Feeds in Outlook 91

---

Adding RSS Feeds . . . . .	92
Viewing RSS Feeds . . . . .	93
Managing Folders . . . . .	94
Managing Messages . . . . .	96

# 7

## Working with Contacts

99

Adding a New Contact . . . . .	100
Inserting Items into a Contact Record . . . . .	103
Viewing Your Contacts Folder . . . . .	105
Viewing Contact Information . . . . .	107
Updating an Existing Contact . . . . .	111
Finding a Contact . . . . .	112
Organizing Your Contacts . . . . .	115
Communicating with Contacts . . . . .	120
Scheduling Meetings and Tasks for a Contact . . . . .	122
Sharing Contact Information . . . . .	124

# 8

## Managing a Calendar

125

Viewing Your Calendar . . . . .	126
Adding an Appointment . . . . .	129
Adding an Event . . . . .	132
Setting Up a Meeting . . . . .	134
Updating Calendar Information . . . . .	137
Inserting Items, Objects, and Files in a Calendar Item . . . . .	140
Working with Reminders . . . . .	144
Sharing Calendar Information . . . . .	145
Printing Calendars . . . . .	147

# 9

## **Working with Tasks** **149**

---

Viewing Your Tasks . . . . .	150
Adding a Task . . . . .	153
Working with Recurring Tasks . . . . .	156
Modifying and Updating a Task . . . . .	158
Inserting Items into a Task . . . . .	162
Assigning a Task to Someone Else . . . . .	166
Sharing Task Information . . . . .	169

# 10

## **Using Alerts and Mobile Features** **173**

---

Configuring Mobile Alert Settings for Exchange Server Accounts . . . . .	174
Setting Up Calendar Alerts . . . . .	176
Setting Up Mobile Alerts for Important Messages . . . . .	178
Setting Up a Text Messaging Service . . . . .	180
Sending Text Messages from Outlook . . . . .	182
Sending Mobile Alerts from Outlook . . . . .	183

# 11

## **Using Outlook with SharePoint and OCS** **187**

---

Adding SharePoint Calendars to Outlook . . . . .	188
Using SharePoint Contacts in Outlook . . . . .	193
Using SharePoint Document Libraries in Outlook . . . . .	196
Using the People Pane . . . . .	198
Viewing Online Status . . . . .	199
Communicating with Others from Outlook . . . . .	201

<b>12</b>	<b>Managing Items and Folders</b>	<b>205</b>
	Using Categories .....	206
	Using Search Folders .....	211
	Organizing with Folders .....	215
	Cleaning Up Folders .....	218
	Deleting Items .....	220
<b>13</b>	<b>Managing Your Outlook Files</b>	<b>223</b>
	Working with Outlook Data Files .....	224
	Importing and Exporting Items .....	226
	Backing Up and Restoring a Data File .....	230
	Archiving Outlook Data Files .....	233
	Working with Offline Folders .....	235
<b>14</b>	<b>Customizing Outlook</b>	<b>237</b>
	Using Read and Delivery Receipts .....	238
	Choosing Message Formats .....	239
	Setting Calendar Options .....	241
	Customizing the Navigation Pane .....	243
	Customizing the Outlook Ribbon .....	248
	Customizing the Quick Access Toolbar .....	251
	<b>Index</b> .....	<b>253</b>

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# Acknowledgments

I've authored and coauthored over 50 books, and each one has been a unique project. Each one has also been a group effort. I'd like to thank everyone at Microsoft and O'Reilly that helped get this project off the ground and for guiding it to completion. Thanks also go to Carole McClendon with Waterside Productions for her help in developing the opportunity. Special thanks also to Ken Brown for his help in launching the project.

A very big thanks to Vince Averello for an outstanding job of tech-editing the book for accuracy—an extremely important task for any good book. Thanks to Microsoft and O'Reilly for creating an awesome design. I also extend thanks to the rest of the editorial and production team for all of their efforts in turning out a great book. They are: Kathleen Atkins; Jaime Odell and Jean Trener with Online Training Solutions, Inc.; Seth Maislin with Potomac Indexing, Inc.; and Ron Bilodeau, Rachel Monaghan, and Rob Romano at O'Reilly.

Finally, I offer my deep appreciation to my wife, Julie, who put up with me revising not one, but two, Outlook 2010 books while also holding down a full-time job.





# 8

# Managing a Calendar

## *In this section:*

- Viewing Your Calendar
- Adding an Appointment
- Adding an Event
- Setting Up a Meeting
- Updating Calendar Information
- Inserting Items, Objects, and Files in a Calendar Item
- Working with Reminders
- Sharing Calendar Information
- Printing Calendars

**T**he Microsoft Outlook 2010 calendar simplifies the burden of keeping and maintaining a schedule of meetings, appointments, events, and tasks. At a glance, you can quickly see your agenda in daily, weekly, or monthly views. With Outlook, you won't have any excuses for missing a lunch date or forgetting a meeting.

Outlook enables you to keep track of recurring meetings or events so that you don't have to manually enter these items each time they take place. For example, you might have a weekly staff meeting that takes place every Friday from 9:00 A.M. to 10:00 A.M. Make it a recurring meeting, and Outlook blocks out that day and time. Similarly, if your PTA meets every third Tuesday of the month at 7:00 P.M., you can set Outlook to schedule that meeting as well.

Outlook includes an alert that displays a message prior to your Calendar meeting, appointment, or task so that you won't forget it. For example, you can set up Outlook to display a reminder of an upcoming meeting two or three days before its occurrence. If you need to prepare a presentation, document, or other item for the meeting, you give yourself ample time to do so. You then can "snooze" the reminder so it gets your attention again later, but perhaps only three hours prior to the meeting.

## Viewing Your Calendar

You can view your Outlook calendar in several different formats. Day view is an hour-by-hour view of your daily schedule, whereas Month view shows your schedule for the entire month. The Date Navigator is a small calendar with which you

can navigate quickly to a specific day, week, or month, while the To-Do Bar consolidates all of the features of task list, Date Navigator, and appointment list into one task pane.

### Use the Date Navigator

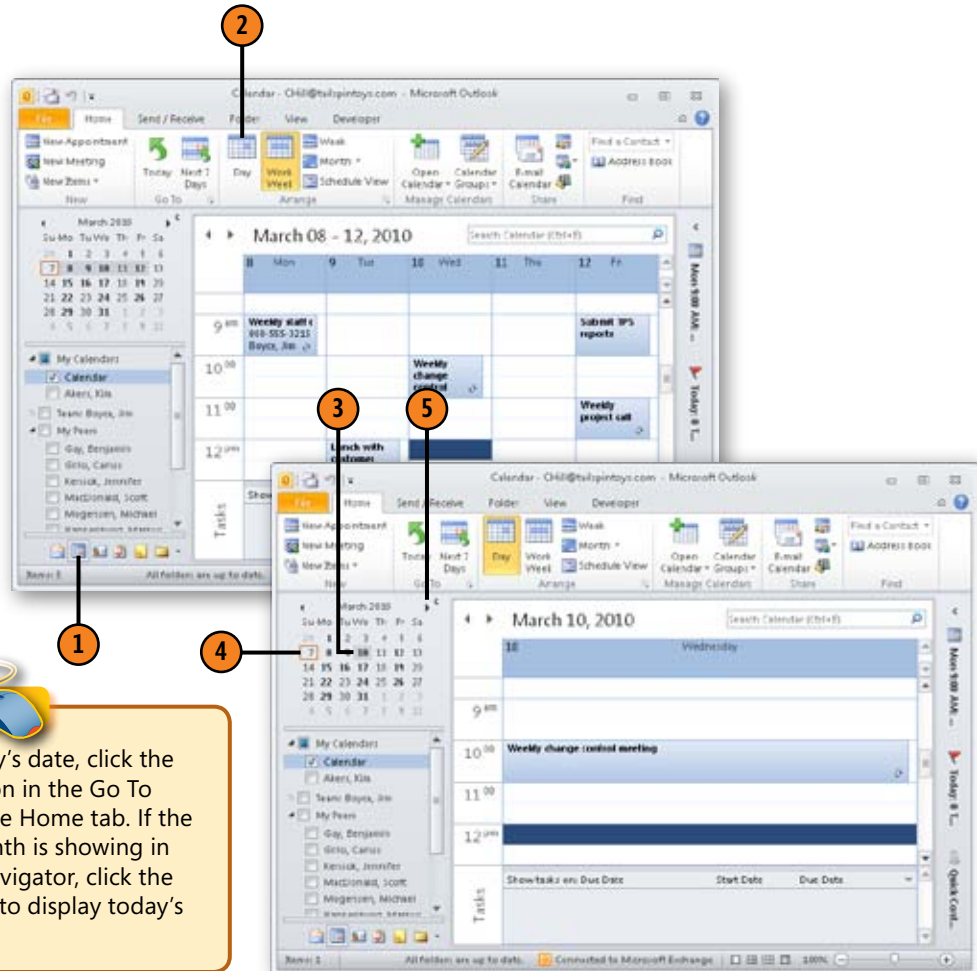
- 1 Click the Calendar icon on the Navigation Pane.
- 2 Click the Day button on the Home tab.
- 3 Click a day on the Date Navigator to display it in the Calendar view.
- 4 Click to the left of a week on the Date Navigator to display that week in the Calendar view.
- 5 Click the right arrow on the Date Navigator to move to the next month.

#### Tip

You can access the current, last three, and next three months by clicking the month name in the Date Navigator. This is handy if you want to jump back a few months or jump forward a month or two.

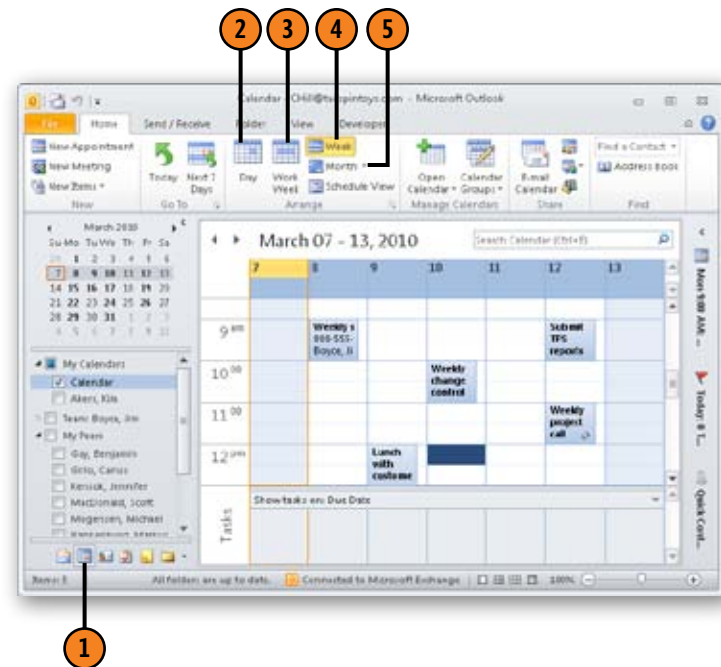
#### Try This!

To see today's date, click the Today button in the Go To group on the Home tab. If the current month is showing in the Date Navigator, click the boxed date to display today's date.



## Use the Calendar View

- 1 Click the Calendar icon on the Navigation Pane.
- 2 Click to see an hourly breakdown of your day.
- 3 Click Work Week to see a workweek's schedule by hour.
- 4 Click Week to see a week's scheduling (including weekend days).
- 5 Click Month to see a month's schedule.



### Tip

You can make more room available for the Calendar pane on the screen by resizing or minimizing the Navigation Pane.

### Tip

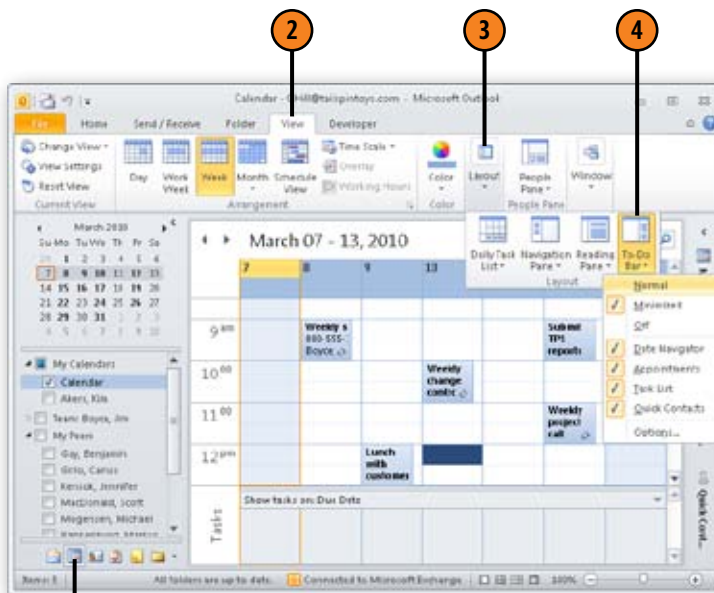
To return to today's date, right-click inside a view and choose Today from the shortcut menu that appears.

## Use the To-Do Bar

- 1 Click the Calendar icon on the Navigation Pane.
- 2 Click the View tab.
- 3 Click Layout.
- 4 Click To-Do Bar, and then choose Normal.

### Tip

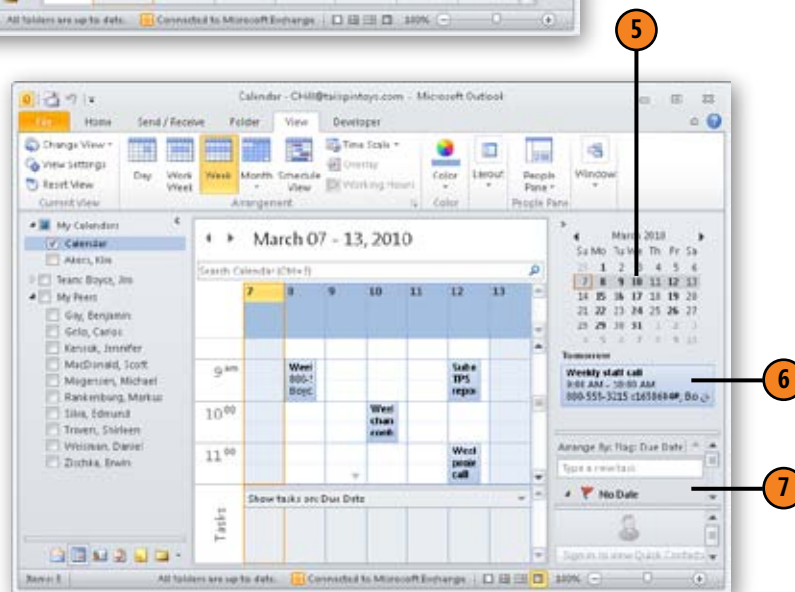
Choose the Minimized option from the To-Do Bar submenu to make the To-Do Bar automatically hide at the edge of the Outlook window.



- 5 Click a date on the Date Navigator to view appointments for that date.
- 6 View upcoming appointments.
- 7 View current tasks.

### Tip

Depending on the options you set for the To-Do Bar, portions of the Appointments or Tasks areas of the To-Do Bar might be blank.



## Adding an Appointment

An appointment in Outlook is an activity you enter for a specific time that, unlike a meeting, doesn't typically involve other people or resources. When you schedule an appointment, you block out a day, a time, and a location for that appointment

to occur. As mentioned earlier, Outlook also lets you set a reminder that flashes on your screen and plays a sound to alert you to the appointment. To learn how to set a reminder, see the task "Working with Reminders" on page 144.

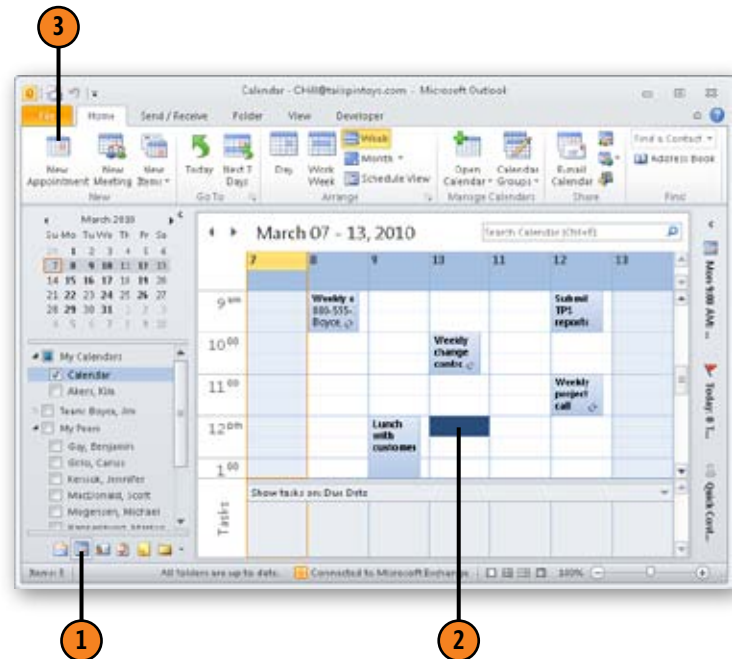
### Add an Appointment with the Menu

- 1 Click the Calendar icon on the Navigation Pane.
- 2 Select a block of time for the appointment.
- 3 Click New Appointment on the Home tab.

*(continued on next page)*

#### Tip

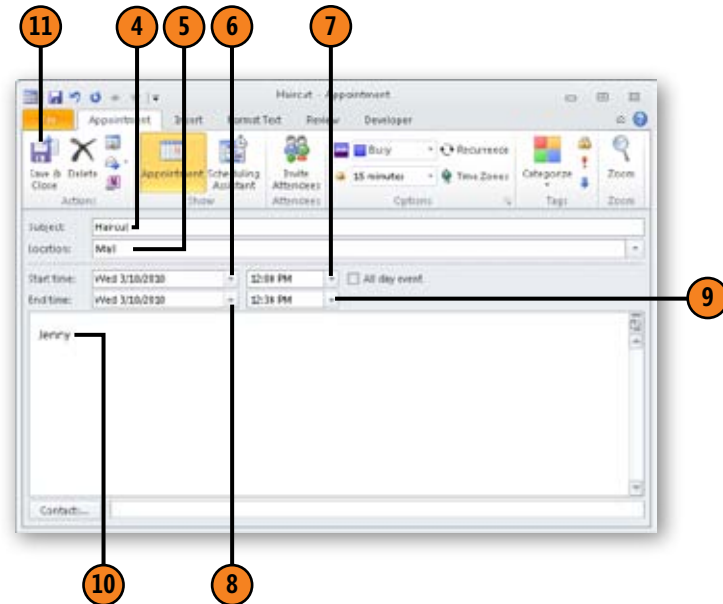
Keep your appointment subjects as short as possible so that they're easy to read in the Calendar view.





## Add an Appointment with the Menu *(continued)*

- 4 Type a description of the appointment in the Subject box.
- 5 Type the location of the appointment in the Location box.
- 6 Click the down arrow to the right of the Start Time date, and select the day of the appointment.
- 7 Click the down arrow to the right of the Start Time hour, and select the starting time of the appointment.
- 8 Click the down arrow to the right of the End Time date, and select the ending day of the appointment if the appointment spans multiple days.
- 9 Click the down arrow to the right of the End Time hour, and select the ending time of the appointment.
- 10 Add notes if you want.
- 11 Click the Save & Close button.



### Try This!

If you'd like to add extended information about an appointment, click in the text area at the bottom of the Appointment window. Type a longer description here, such as directions to the appointment location, important information about the appointment, and so on.

### Tip

You can print your appointments to the default printer by clicking the Print button on the File tab.

## Add an Appointment Right on the Calendar

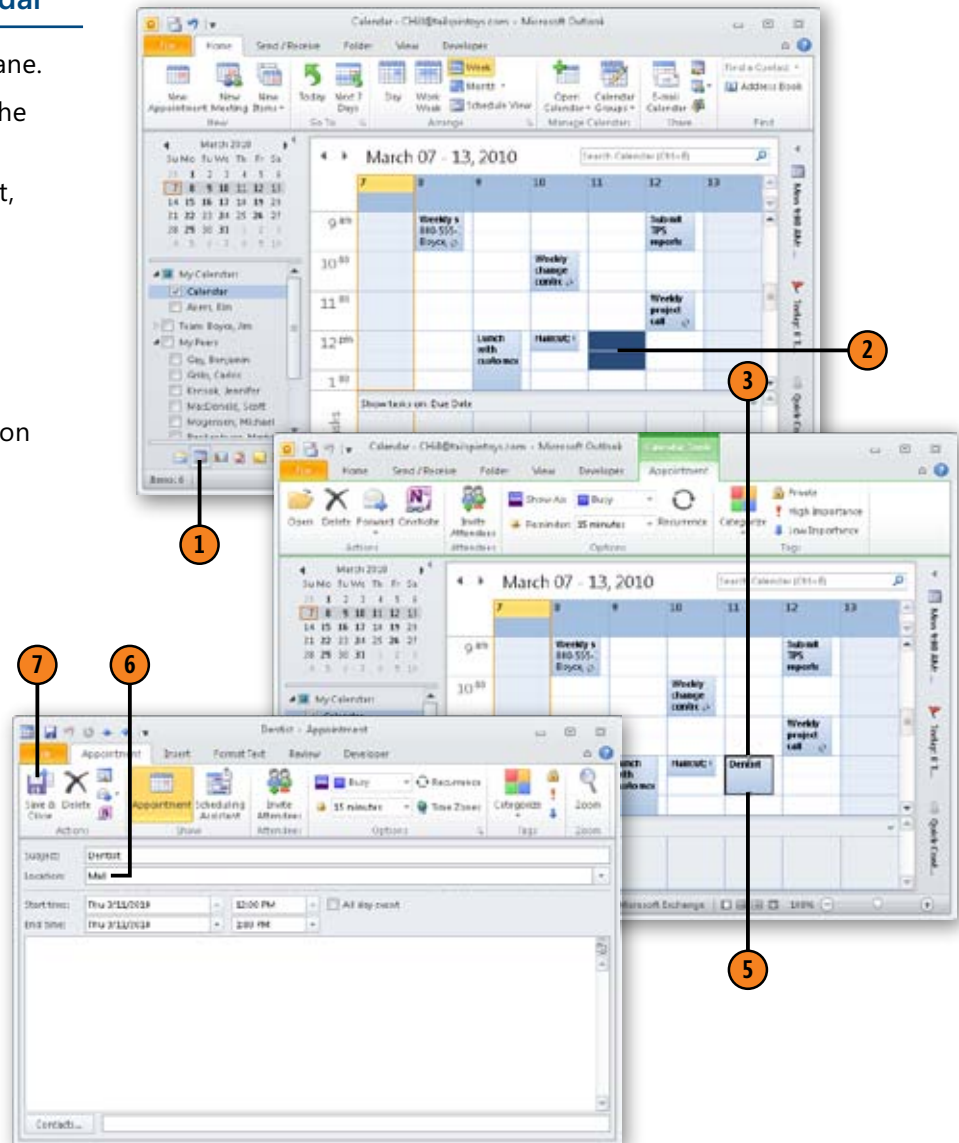
- 1 Click the Calendar icon on the Navigation pane.
- 2 Click and drag to select a block of time for the appointment on the Calendar.
- 3 Begin typing the Subject of the appointment, and the subject appears in the blocked-out space on the Calendar.
- 4 Press Enter.
- 5 Double-click the appointment to open the appointment form.
- 6 Add the location, notes, and other information to the appointment.
- 7 Click the Save & Close button.

### Tip

If you use Outlook with a Microsoft Exchange Server account, others can easily see your free/busy time. They know when you're busy and can schedule meetings with you based on this information.

### Tip

To categorize the appointment, right-click the appointment and choose Categorize, and then choose a category from the submenu.



## Adding an Event

An event is an activity that runs for 24 hours or longer. An example of an event is a weeklong conference or seminar that you attend. Events display as banners at the top of the day and run from midnight to midnight, so they don't take up blocks of

time on the Calendar. This display method leaves room in your calendar for you to show appointments or meetings that you might schedule during event days.

### Describe the Event

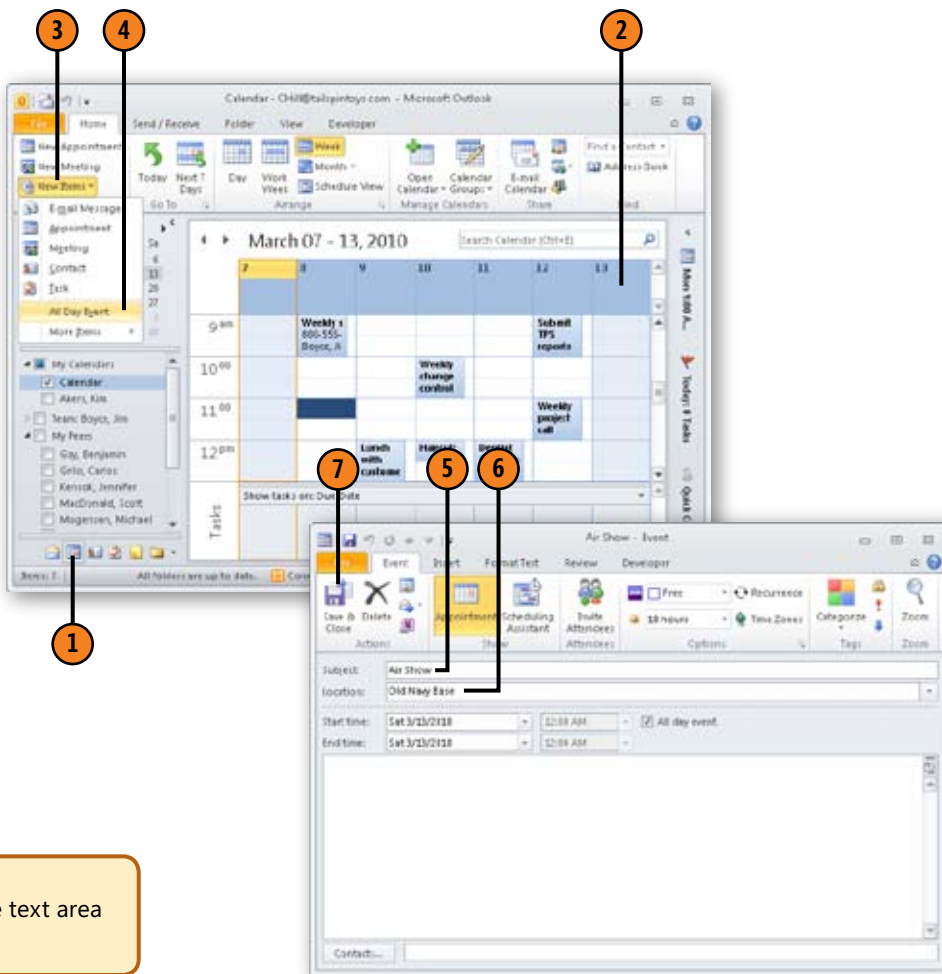
- 1 Click the Calendar icon on the Navigation Pane.
- 2 Click a day on the calendar.
- 3 Click the New Items button.
- 4 Choose All Day Event from the shortcut menu.
- 5 Type a description of the event in the Subject box.
- 6 Type the location of the event in the Location box.
- 7 Click the Save & Close button.

#### Tip

To add an all-day event to a day other than the current day, display the week or month, right-click on the day, and then choose New All Day Event.

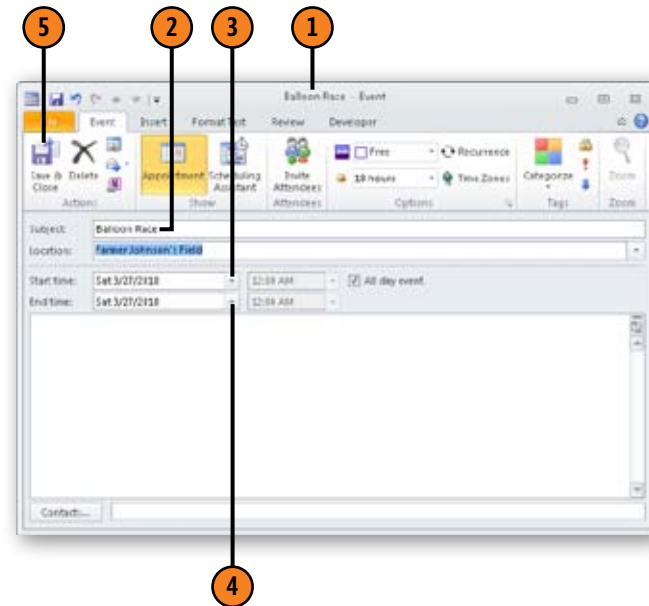
#### Try This!

You can add more information about an event to the text area at the bottom of the Event window.



## Change the Event's Scheduled Date

- 1 Create a new event.
- 2 Add a subject and location for the event.
- 3 Click the Start Time date down arrow and select the starting day of the event.
- 4 Click the End Time date down arrow and select the ending day of the event if it is a multiple-day event.
- 5 Click the Save & Close button.



### Tip

You may already have events entered in your Calendar folder. When you create a new contact in the Contacts folder and include a birthday or anniversary for the contact, Outlook schedules that date as an event in the calendar.

### See Also

For information on setting up contacts, see Section 7, "Working with Contacts," starting on page 99.

## Setting Up a Meeting

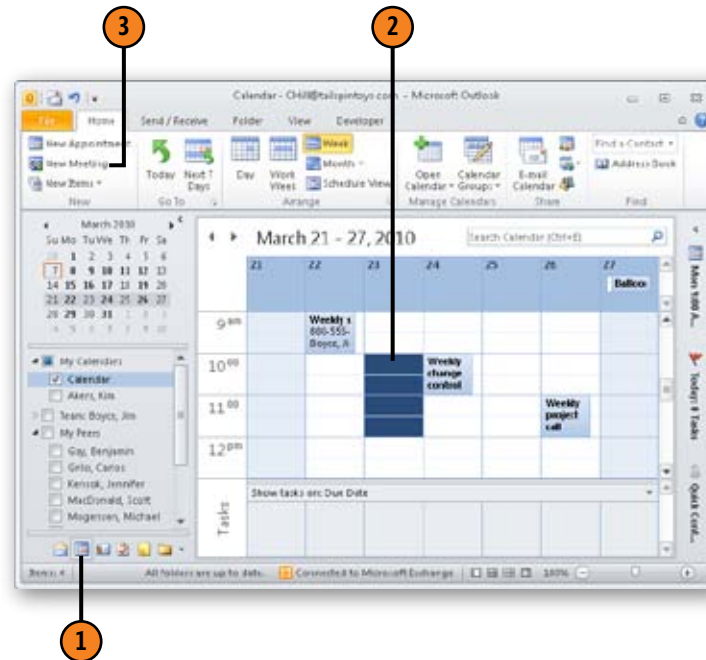
A meeting is an activity (often a physical meeting or conference call) that involves other people and sometimes resources. A resource can be a conference room, VCR, slide projector, telephones, laptop computer, or other equipment. Usually a meeting

involves you and at least two other people (but can certainly be just you and one other person). Outlook sends a meeting invitation to every person you designate, and they can accept or reject the request or propose a new time for the meeting.

### Create a Meeting in a Block of Time

- 1 Click the Calendar icon on the Navigation Pane.
- 2 Highlight a block of time on the meeting day for the meeting.
- 3 Click New Meeting on the Home tab.

*(continued on next page)*



#### Tip

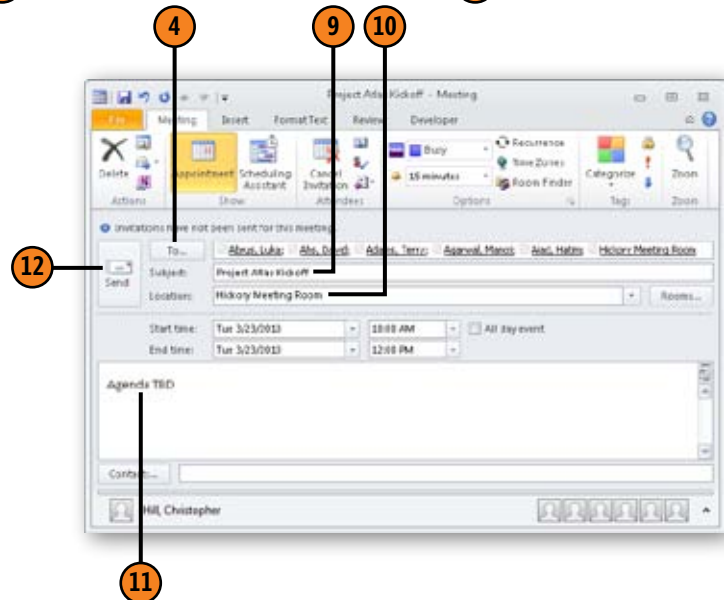
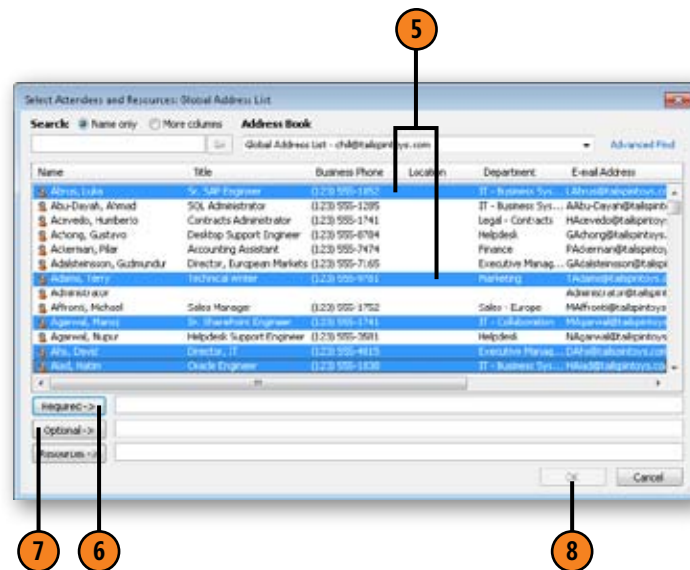
You can use the Scheduling Assistant to help you find a time that is open for all invitees, and you can also identify available resources. To switch to the Scheduling Assistant view, click Scheduling Assistant in the Show group on the Meeting tab of the ribbon.

## Create a Meeting in a Block of Time *(continued)*

- 4 Click To.
- 5 Select attendees and resources from the Address Book, or type the addresses manually.
- 6 Click Required if the invitee needs to attend.
- 7 Click Optional if the invitee isn't required to attend.
- 8 Click OK when you are done.
- 9 Type a description of the meeting in the Subject box.
- 10 Type the location of the meeting in the Location box.
- 11 Add notes, directions, or comments for the meeting as needed.
- 12 Click Send.

## Try This!

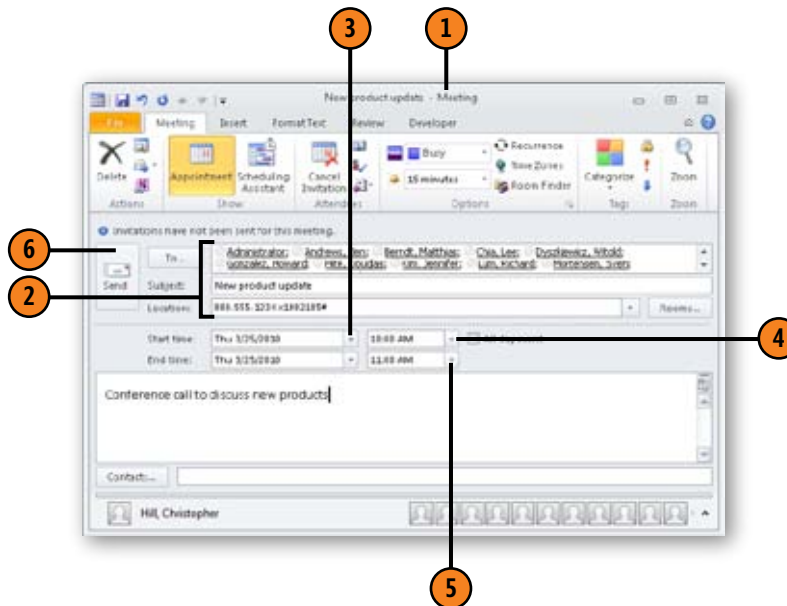
When you type your meeting subject, keep it short but descriptive. “Team Meeting” may not be enough if people are members of multiple teams. Use something specific like “Development Team Meeting” for your description.



## Change the Meeting Date and Time

Outlook uses the currently selected date and time by default when you create a new meeting request. You can change the date and time as you need to, rather than accept the default.

- 1 Create a new meeting.
- 2 Add attendees, a subject, and a location for the meeting.
- 3 Click the down arrow in the Start Time date field, and select the starting date.
- 4 Click the down arrow in the Start Time hour field, and select the starting time of the meeting.
- 5 Click the down arrow in the End Time hour field, and select the ending time of the meeting.
- 6 Click Send.



### Caution

Make sure that your attendee list has correct e-mail addresses. If you attempt to send the meeting request to someone not in one of your address books, Outlook lets you know that the person can't be validated.

### See Also

For information on the Address Book and adding new contacts, see Section 7, "Working with Contacts," starting on page 99.

### Tip

Outlook provides the Scheduling Assistant to help you set up meetings with other people in your organization. The Scheduling Assistant lets you see other people's schedules if they have mailboxes in the same Exchange Server environment.



## Updating Calendar Information

Outlook lets you edit a meeting, appointment, or event information saved in the Calendar folder. You might, for example, need to modify the time an appointment starts or ends, change where a meeting is held, or adjust the date of an event. When you change a meeting, you can send new meeting messages to attendees to announce the change.

### Change an Appointment

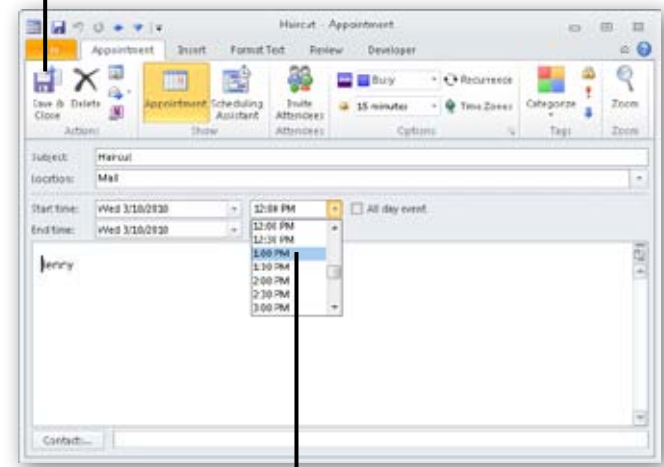
- ❶ Click the Calendar icon on the Navigation Pane.
- ❷ Double-click the appointment you want to change. (If you open a recurring appointment, Outlook asks whether you want to change the occurrence or the series.)
- ❸ Make changes to the appointment.
- ❹ Click the Save & Close button.

#### Tip

Any date that has a meeting, appointment, or event appears in bold on the Date Navigator. Click that date to switch to the day, week, or month in which that activity occurs.

#### Try This!

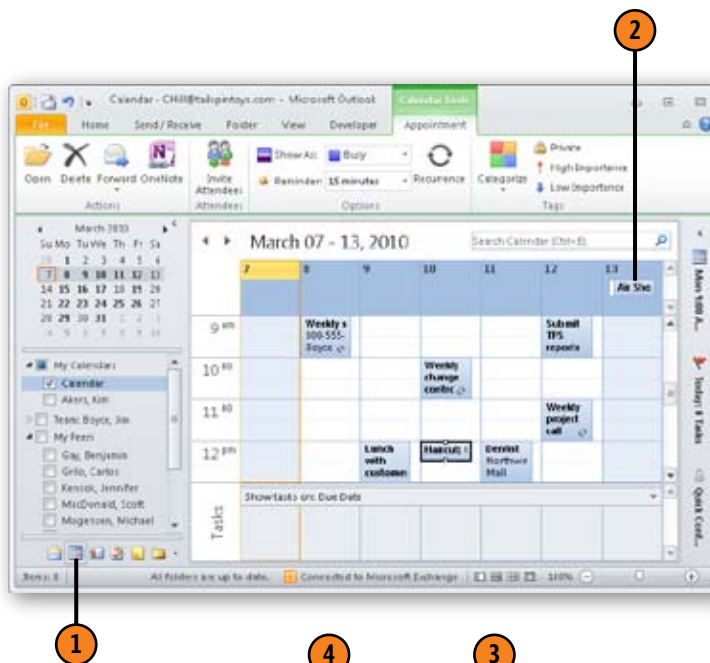
Make an appointment recurring by clicking the Recurrence button and filling out the Appointment Recurrence information. For example, set the time for the appointment to occur from 8:00 A.M. to 10:00 A.M. every Thursday.





## Update Event Information

- 1 Click the Calendar icon on the Navigation Pane.
- 2 Double-click the event you want to change.
- 3 Make changes to the event.
- 4 Click the Save & Close button.



### Tip

Events appear at the top of Day and Week views and are shown within a box in Month view.

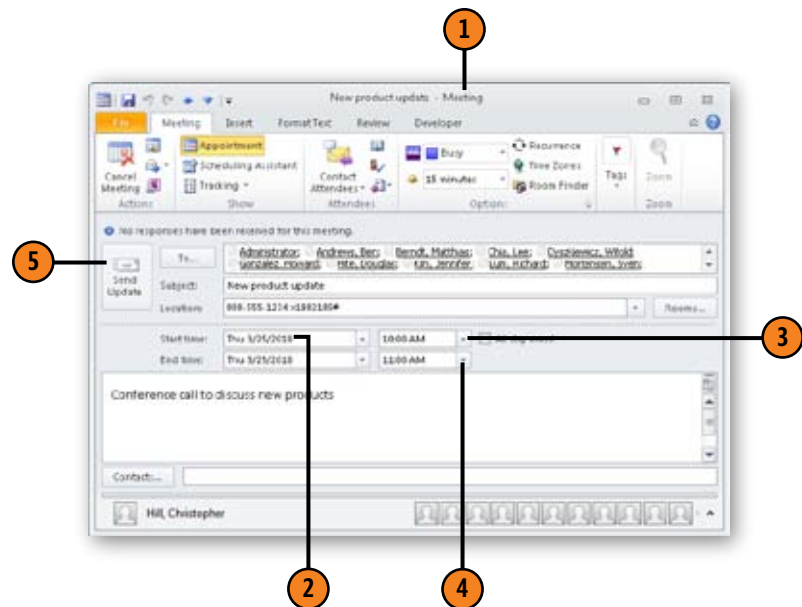
### Caution

If you deselect the All Day Event option on the Appointment tab for the event, you may create a conflict with appointments or meetings you've already set up for that day. Remember that events run for 24 hours—from midnight to midnight.



## Reschedule a Meeting

- 1 Open the meeting you want to change. If it is a recurring meeting, specify whether you want to change the occurrence or the series.
- 2 Change the start day, if needed.
- 3 Click the Start Time hour drop-down list, and select the new start time.
- 4 Click the End Time hour drop-down list, and select the new end time.
- 5 Click Send Update.



### Tip

You can reschedule a meeting simply by dragging it to a new location on the Calendar. Regardless of the method you use to move the meeting, Outlook can automatically send an update to all attendees with notice of the new day and time.

### Tip

Use the Tracking button on the Meeting tab to see which attendees have responded to your meeting request.

## Inserting Items, Objects, and Files in a Calendar Item

Outlook enables you to insert objects, files, and Outlook items into your Calendar items. For example, you may have a meeting to which you want to take an important document or an agenda. You can insert the document into the meeting item

so that you don't forget to take it with you and so that other attendees have a copy of it. You can add contacts from Outlook to a calendar item in much the same way.

### Add an Outlook Item

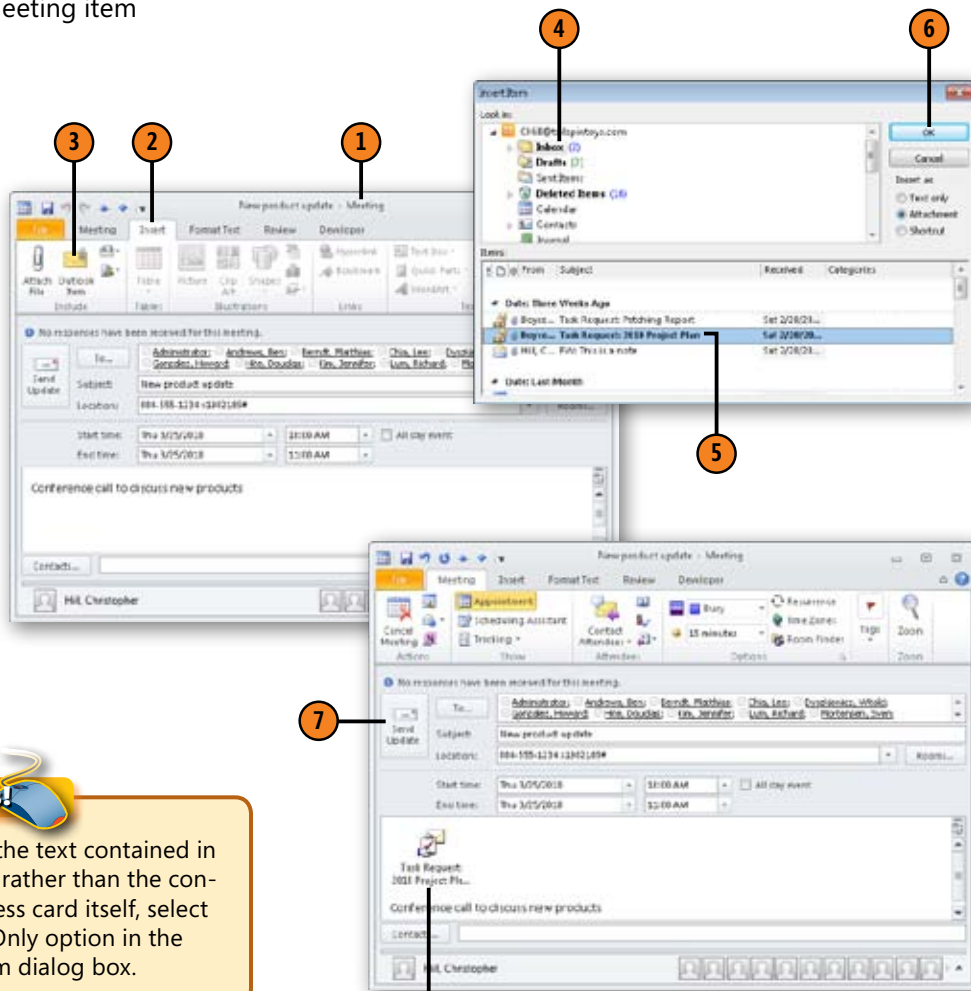
- 1 Open an appointment, meeting, or event.
- 2 Click the Insert tab on the ribbon.
- 3 Click Outlook Item.
- 4 Select the Outlook folder in which the item is stored.
- 5 Select the Outlook item you want to insert from the Items list.
- 6 Click OK. The selected item now appears in the comment field.
- 7 Click the Meeting, Appointment, or Event tab, and then click Save & Close (for an appointment or event) or Send Update (for a meeting).

#### Tip

Outlook uses an item-specific icon to indicate the type of Outlook item that you can insert, such as a note icon for a note item or calendar icon for a calendar item.

#### Try This!

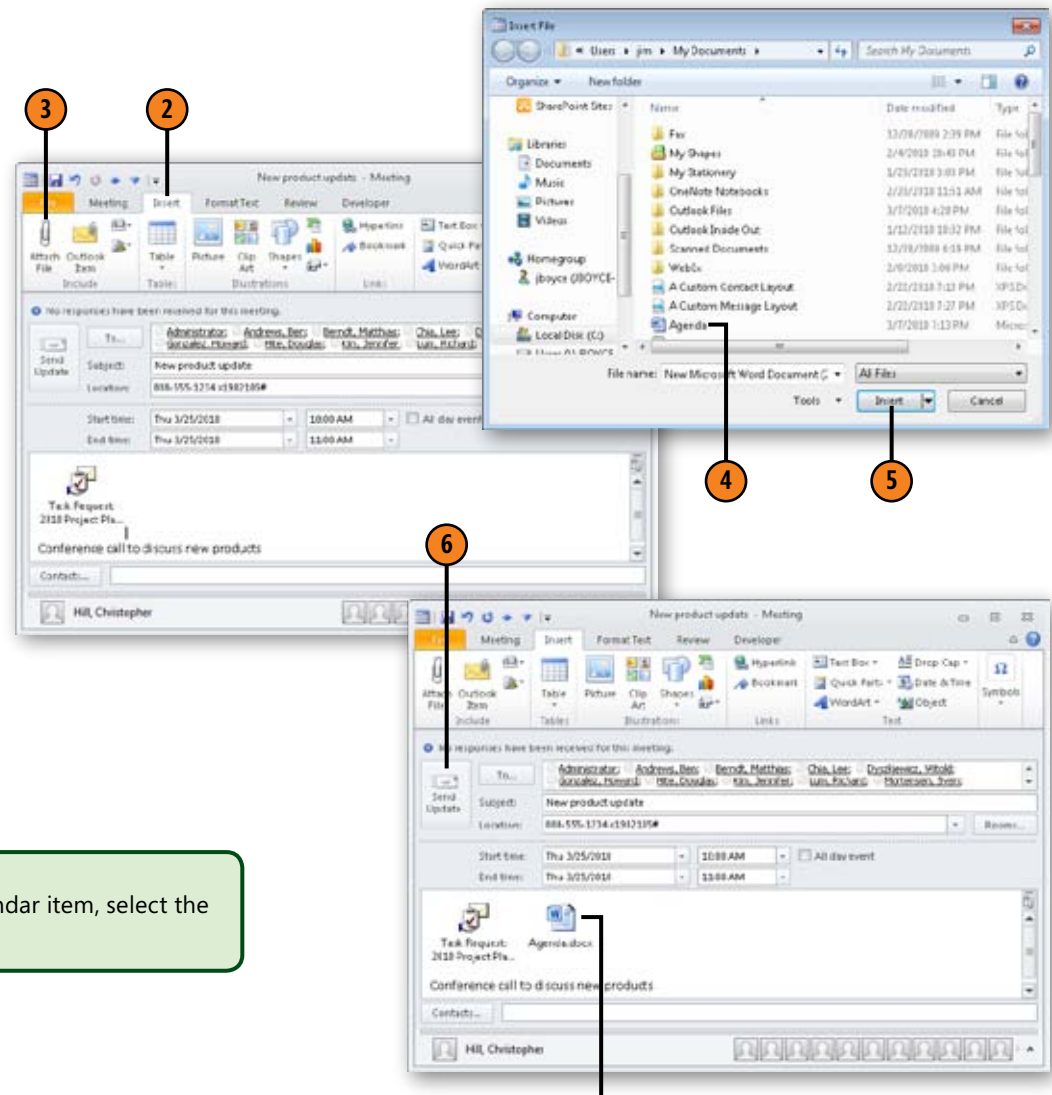
To insert the text contained in a contact rather than the contact address card itself, select the Text Only option in the Insert Item dialog box.



The selected item appears in the comment field.

## Add a File

- 1 Double-click an appointment, meeting, or event.
- 2 Click the Insert tab on the ribbon.
- 3 Click the Attach File button.
- 4 Select the file you want to insert.
- 5 Click Insert. The added file appears in the comment field.
- 6 Click the Meeting, Appointment, or Event tab, and then click Save & Close (or Send Update, for a meeting).



### Tip

To delete a file, item, or object from a Calendar item, select the item and press Delete.

The added file appears in the comment field.

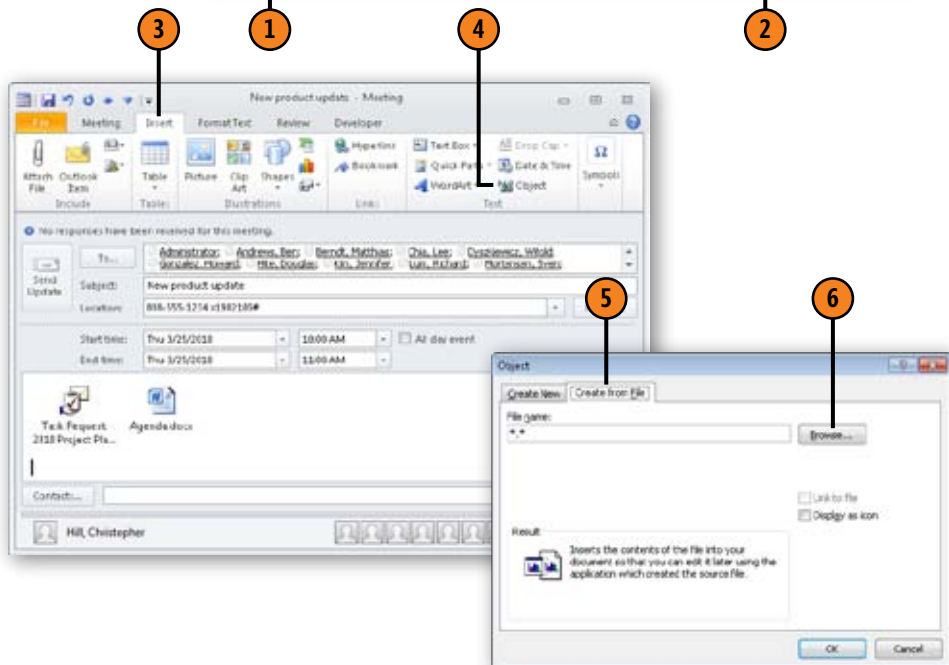
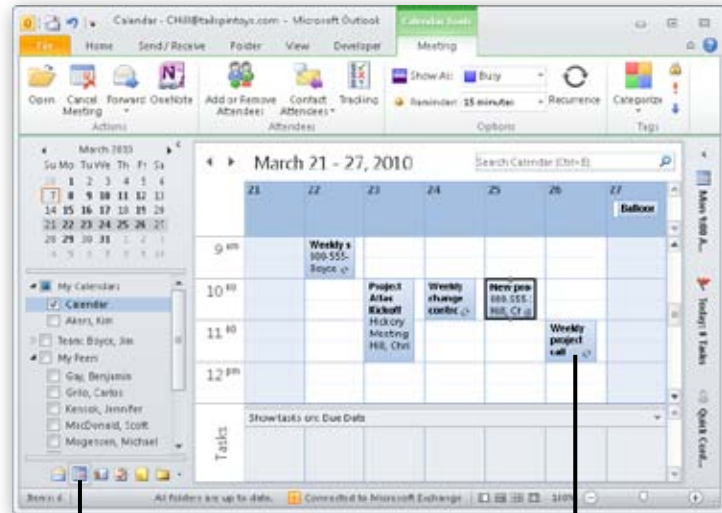
## Add an Object from a File

- 1 Click the Calendar icon on the Navigation Pane.
- 2 Double-click an appointment, meeting, or event.
- 3 Click the Insert tab on the ribbon, and then click in the notes area of the item.
- 4 Click Object on the Text group of the ribbon's Insert tab.
- 5 Click the Create From File tab.
- 6 Click Browse.

(continued on next page)

### Tip

Because you can add objects from a file, you can also embed a portion of a spreadsheet or other type of document in the appointment item for reference. For example, if you are discussing a project issue list in a meeting, you might embed the issue list from a Microsoft Excel spreadsheet in the meeting request so that the participants can review it before the meeting.

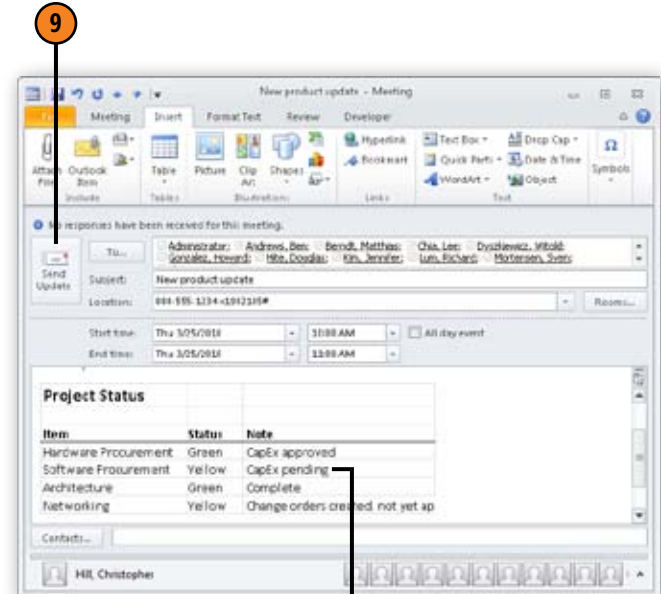
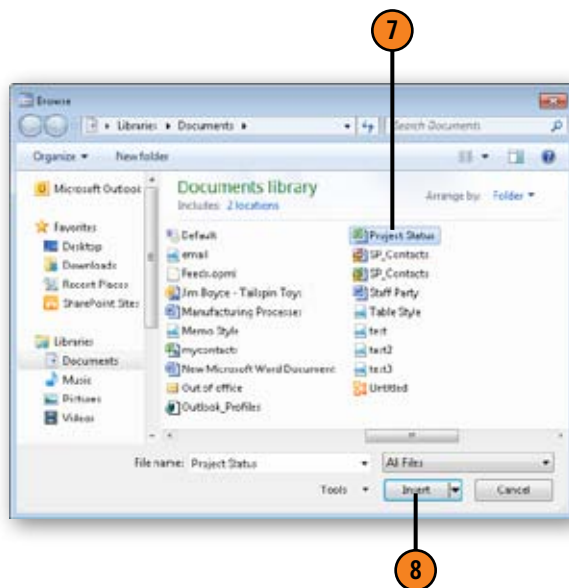


## Add an Object from a File *(continued)*

- 7 In the dialog box, click the object you want to add.
- 8 Click Insert, and then click OK in the Object dialog box. The added object appears in the comment field.
- 9 Click the Appointment, Meeting, or Event tab, and then click Save & Close (or Send Update).

### Tip

To create a new object, such as an Excel worksheet, select Create New in the Insert Object dialog box. When you click OK to insert the object, you then create the new object in that object's native application (such as Excel).



The added object appears in the comment field.



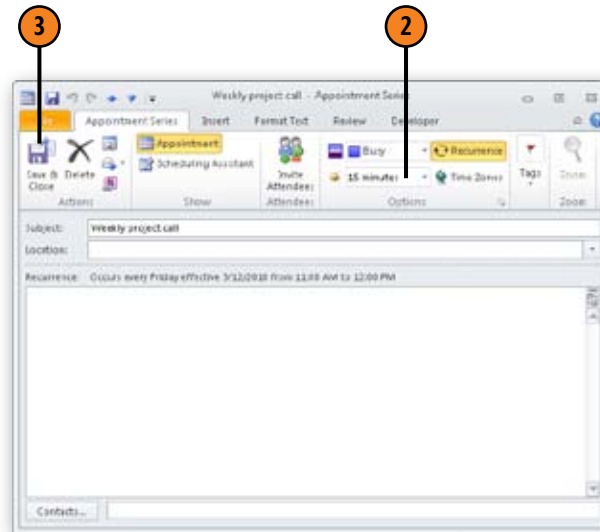
## Working with Reminders

You can have Outlook display a reminder of upcoming appointments, events, or meetings. The reminder displays in a message box and can sound an alarm to alert you. You can use any sound included with Windows or use a sound that you've downloaded from the Internet and saved to your hard

drive. Outlook adds a 15-minute reminder automatically when you create appointments or meetings, so you need to use the following process only if you want to add a reminder to an item that doesn't have one or when you want to change the reminder.

### Add or Change a Reminder

- 1 Open the appointment, meeting, or event for which you want to set a reminder.
- 2 In the Options group on the ribbon's Appointment tab, choose a reminder time.
- 3 Click the Save & Close button. Outlook reminds you of the appointment at the scheduled time.



#### Tip

You can set up reminders for meetings and events by following the same sequence of steps shown here for appointments.

#### Tip

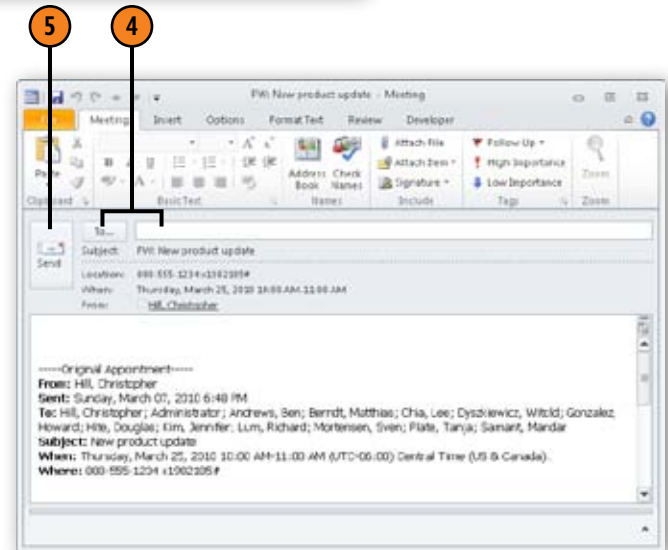
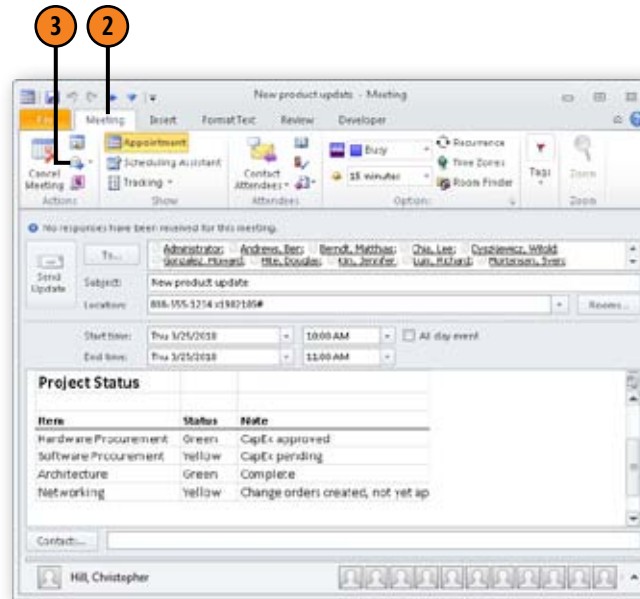
Reminders display even if the Calendar item is overdue. For example, if an event was set for Saturday and you didn't turn on your computer that day, the next time you start Windows, the reminder for that event appears. You can dismiss the reminder at that point.

## Sharing Calendar Information

Outlook enables you to share Calendar information with others. You can forward a Calendar item by e-mail to other Outlook users, or you can forward an iCalendar item to any user of any Internet-connected mail program. You should use iCalendar when you schedule meetings with people who don't use Outlook.

### Forward a Calendar Item

- 1 Open an existing meeting item.
- 2 Click the Meeting tab of the ribbon.
- 3 Click the Forward button.
- 4 Type the e-mail address of the recipient in the To box.
- 5 Click Send.





## Forward an Item As iCalendar

- 1 Open a meeting item by double-clicking it in the Calendar.
- 2 Click the Meeting tab on the ribbon. This tab is named Meeting Series for a recurring meeting.
- 3 Click the arrow beside the Forward button.
- 4 Choose Forward As iCalendar. The item appears as an attachment.
- 5 Type the e-mail address of the recipient in the To box.
- 6 Click Send.

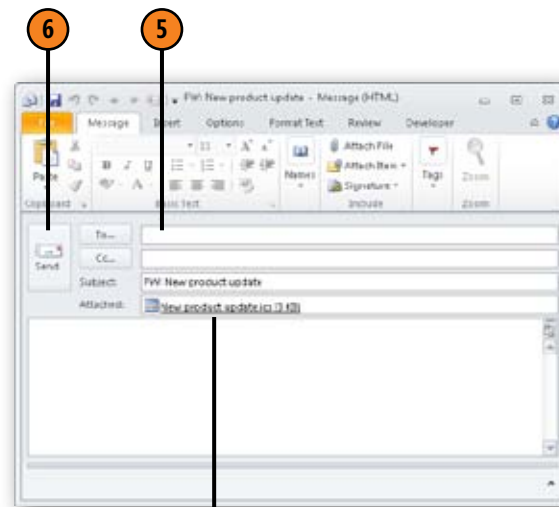


### Tip

If you forward a calendar item that has an attachment, that attachment is forwarded along with the calendar item.

### Tip

iCalendar is for communicating with people who don't use Outlook. If you want to forward a Calendar item to someone who uses Outlook, use the Forward command on the Actions menu or click Forward in the Actions group on the meeting form's ribbon.



The item appears as an attachment.

## Printing Calendars

You can print your Outlook appointment calendar, such as your daily or weekly appointments, meetings, and events. Or you can print an individual calendar item, such as a meeting item.

### Print your Appointment Calendar

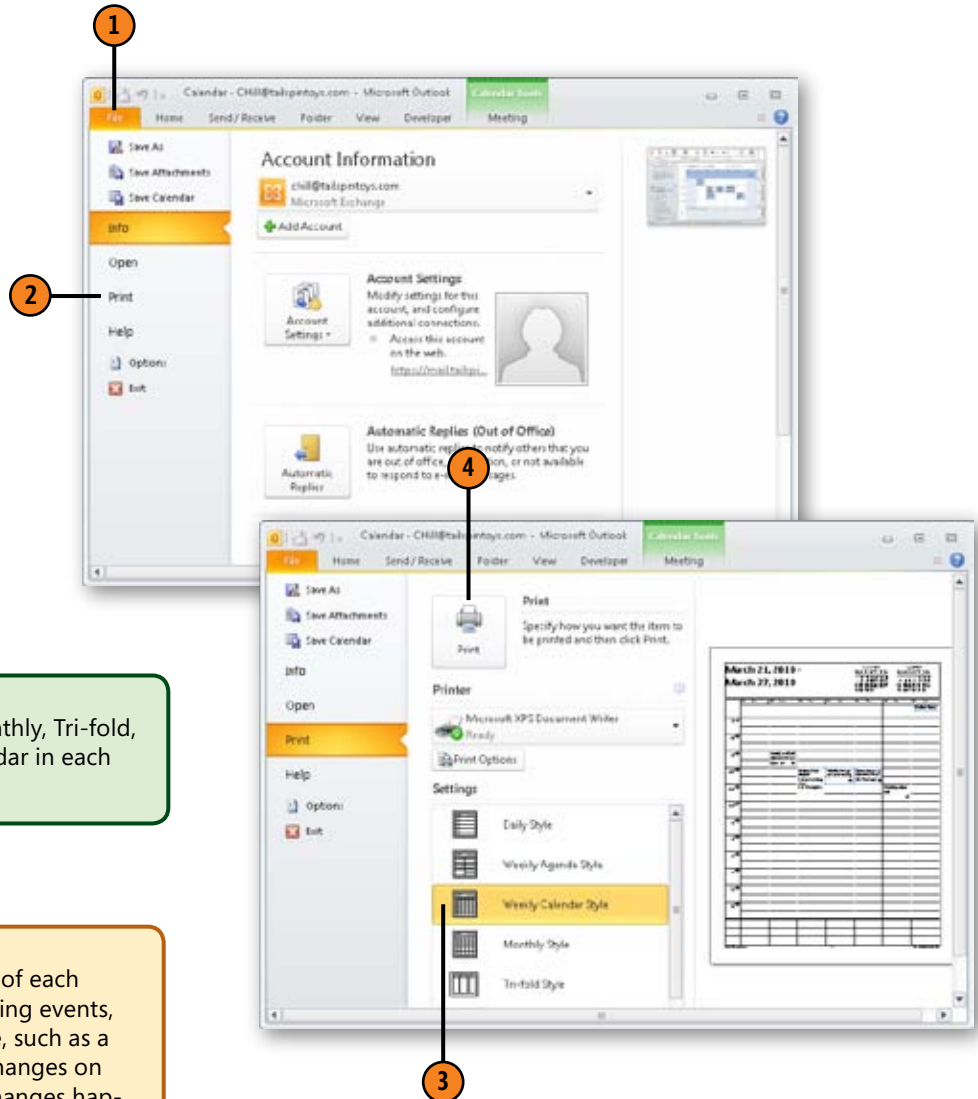
- 1 Click the Calendar icon on the Navigation Pane, and then click File.
- 2 Choose Print.
- 3 Choose a calendar style in the Print Style area.
- 4 Click Print.

#### Tip

You can print your calendars in Daily, Weekly, Monthly, Tri-fold, Calendar Detail, and Memo Style. Print your calendar in each one of these styles and pick your favorite one.

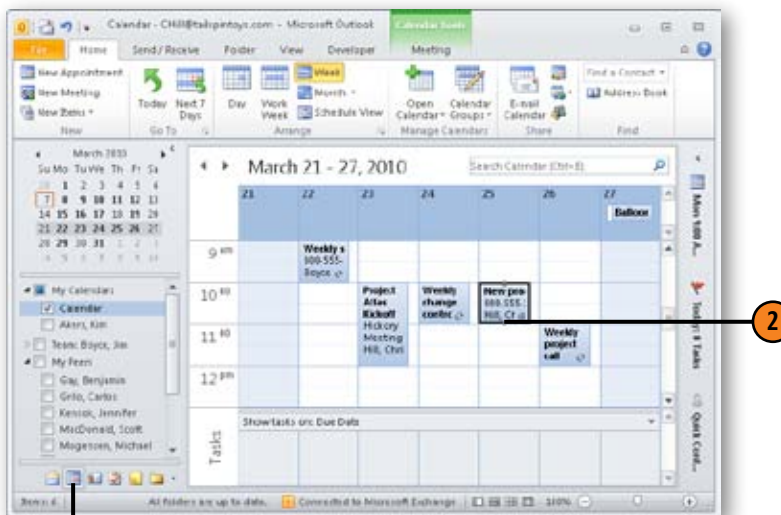
#### Try This!

Print your appointment calendar at the beginning of each week so that you can keep track of all your upcoming events, appointments, and meetings. As schedules change, such as a meeting being delayed or canceled, make these changes on the hard copy as well as in Outlook. If too many changes happen, of course, you need to print a fresh calendar.



## Print a Calendar Item

- 1 Click the Calendar icon on the Navigation Pane.
- 2 Double-click the Calendar item you want to print.
- 3 Click File.
- 4 Click Print.
- 5 Set print options.
- 6 Click Print.



1

3

4

6

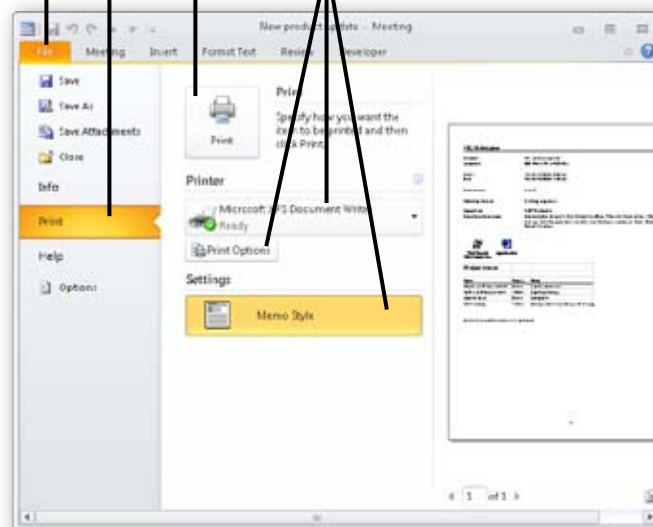
5

### Tip

If you want to print to a printer other than the default one, click the Printer drop-down list and select the printer.

### Try This!

Print a Calendar item that has an attachment inserted in it. Click Print Options, and when the Print dialog box appears, select Print Attached Files to print the attachment.



# Index

## Symbols

% Complete property of task, 154, 158

## A

Access database, importing data from, 226

Account Settings dialog box

E-mail tab

Exchange Server account, 235

Find A Text Messaging Service For Your Mobile Operator, 180

activities, associated with contact, 109

Add New Account dialog box, 38

Add New Category dialog box, 208

Address Book, 48, 50–51

adding contacts, 106

finding name in, 51

to select person for e-mail alert, 179

Address Cards, 111

information entry, 100

addresses

for e-mail messages, 48

importing from other programs, 40

Advanced Find dialog box, 25, 114

alarm for calendar item, 144

alerts

configuring settings for Exchange Server accounts, 174–175

for important messages, 178–179

for meetings and appointments, 125

for SharePoint calendar changes, 189

sending to mobile devices, 173, 183–185

setting up Calendar, 176–177

to mobile device, 26

All Day Event, 132, 138

All Outlook Items folder list, 216

anniversary, as calendar event, 133

antivirus program, 79

applications

creating shortcut for, 247

for opening attachments, 79

appointments, 34

adding file to, 141

adding information about, 130

adding Outlook item to, 140

adding to Calendar, 129–131

with menu, 129–130, 130–131

changing, 137

embedding spreadsheet portion, 142

opening, 43

printing, 130, 147

recurring, 137

reminders for, 144

archive, display in Navigation Pane, 15

archiving

exporting items for, 228

Outlook data files, 233–234

to Outlook data file, 234

assigning tasks to another, 166–168

assumptions, 4

attached faxes, search folder for messages

with, 211

attachments

forwarding with calendar item, 146

printing, 148

to e-mail, 79–80

forwarding, 82

saving, 80, 82

to tasks, 162

attachments to e-mail, 64–65, 65

audio reminder, 155

AutoArchive dialog box, 233

AutoArchive options for folder, 218, 219

AutoArchive, setting options, 233

AutoDialer option, 121

availability, viewing, 200

## B

Backstage view, 10–11

Account Settings, Manage Mobile

Notifications, 26

backup of contacts, 105

backup of Outlook data, 230–232

exporting items for, 228

of archive file, 234

Bcc field, 160

Bing Web site, 110

birthday, as calendar event, 133

body of e-mail message, 49

boilerplate text, 59

boldface, e-mail messages in, 72

bold text, 6, 58

Business Card, 111

busy time

calendar display of, 16–17

Exchange Server account for sharing, 131

## C

Cached Exchange Mode, configuring

Outlook for, 235–236

Calendar, 125

adding appointment, 129–131

directly on Calendar, 131

with menu, 129–130, 130–131

adding event, 132–133

adding object from file, 142–143, 143–144

adding to Outlook from SharePoint, 188–192

## Calendar (*continued*)

- alerts to mobile device
  - sending, 183
  - setting up, 176–177
- customizing, 241–242
- Daily Task List, 150
- event updates, 138
- inserting items, objects and files,
  - 140–143
- meeting rescheduling, 139
- meeting setup, 134–136
- new features, 16–20
- notifications of updates, 177
- preview for invitation, 18–19
- printing, 147–148
- reminders, 144
- sharing information from, 145–146
- Task List in, 152
- updating information, 137–139
- viewing, 126–128

Calendar folder, 33

calendar items, creating in Outlook for SharePoint, 191

Calendar view, 127

categories, 206–210

- adding to category list, 208
- assigning multiple, 207
- deleting, 210
- for contact organization, 117
- for items, 206
- name changes, 209

Categorized Mail search folder, 212

- items without color associated, 211

CD drive, backing up PST file to, 231

cell phone, alerts to, 173

cleaning up folders, 218–219

closing

- Address Book, 51
- Outlook item, 35

## color

- Categorized Mail search folder item
  - without, 211
- for categories, 206
- indicator of person's availability, 200
- of e-mail message text, 58

Color Categories dialog box, 117, 208

color schemes, 62

columns

- adding and removing on Task List, 151
- adding to custom contacts view, 118

commands, adding to Quick Access Toolbar, 251

communication

- with contacts, 120–121
- with others, 201–203
  - instant messaging session, 201
  - voice call, 202–203

completed tasks, deleting, 159

Compose Messages In This Format drop-down list, 240

computers, selectively copying Outlook items between, 227

computer virus, e-mail attachment infected with, 79

Conditional Formatting for custom contacts view, 119

contact card window, 21

contact groups, 52–54, 106

- creating, 52–53

contacts, 34, 99

- activities associated with, 109
- adding file, 104
- adding new, 100–102
  - from e-mail message, 100–101
  - with Contact window, 102
- adding to Address Book, 106
- creating in SharePoint list from Outlook, 194–195

- customizing views, 118–119
  - inserting item in record, 103–104
  - map display for, 110
  - meeting request with, 122–123
  - organizing, 115–119
    - with categories, 117
    - with folders, 115–116
  - phone call to, 121
  - printing information, 107–108
  - searching for, 112–114
  - sending e-mail to, 120
  - sharing information on, 124
  - updating existing with Contacts folder, 111
  - use of SharePoint contacts in Outlook, 193–195
  - viewing information, 107–110
- Contacts folder, 33, 50, 99, 100, 133
  - creating new contact in, 44
  - scrolling through, 112
  - viewing, 105–106
- Contact tab in ribbon, More, Map It in Communicate group, 110
- Contact window for adding information, 102
- Contents Pane, 10
- Conversation feature, 13
- conversations, 205
- copy and paste, 56
  - RSS links, 92
- copying
  - contacts to SharePoint list, 195
  - e-mail message text, 56
- Create New Folder dialog box, 215
- Create Or Open Outlook Data File dialog box, 224
  - selecting existing PST file in, 225
- Create Outlook Data File dialog box, 229
- Create Rule dialog box, 86

- Current View menu, 44
- custom calendar groups, 16
- customizing Outlook, 237
  - Calendar option, 241–242
  - message format choices, 239–240
  - Navigation Pane, 243–247
    - adding shortcuts, 244–247, 245–248
    - showing or hiding, 243
  - Quick Access Toolbar, 251
  - read and delivery receipts, 238
- ribbon, 248–250
  - adding tab, 249–250
  - turning on or off, 248

## D

- daily calendar agenda, sending to mobile device, 176, 177
- Daily Task List, 150
- Data Files tab in ribbon, 231
- data retrieval from another program, 41–42
- Date Navigator, 126
- dates for tasks, changing, 155
- Day view for calendar, 126
  - events in, 138
- default message format, 240
- deleted categories, 208, 211
- deleted contacts, undoing, 112
- Deleted Items folder, 76, 159, 220
  - emptying, 219, 221
  - space used by, 219
- deleting
  - categories, 210
  - completed tasks, 159
  - e-mail messages, 76
  - file, item or object from Calendar item, 141
  - items from folders, 220
  - items from mailbox, 219

- delivery receipts for e-mail messages, 238
- desktop, dragging Outlook icon to, 32
- distribution lists, 52. *See also* contact groups
- document libraries, use of SharePoint in Outlook, 196–197
- domain, blocking mail from, 85
- downloading
  - full RSS feed article, 98
  - RSS feed content, 93
- Draft messages, reviewing, 68
- Drafts folder, 33, 69
- dragging
  - contacts to folder, 115
  - items to create shortcuts, 246
  - moving items without, 217
  - to move items to folder, 216
  - to move RSS folder, 95
  - to reschedule meeting, 139
- due date for tasks, 153

## E

- e-mail, 47
  - new features, 13–14
- e-mail accounts, 36–39
  - adding manually, 38–39
- e-mail addresses
  - for contacts, 102, 120
  - for meeting attendees, 136
  - searching for partial, 114
- e-mail messages, 34. *See also* attachments, to e-mail
  - adding new contact from, 100–101
  - addressing, 48
  - alerts to mobile device for, 178–179
  - attaching files, 65
  - to contact group, 54
  - deleting, 76
  - displaying related together, 13
  - editing, 55
  - editor for, 57
  - filter rule based on, 86
  - follow-up for, 89–90
  - format choices for, 239–240
  - formatting text, 57–58
  - for name in Address Book, 51
  - for sending task assignment, 166
  - for task status report, 160–161
  - forwarding, 82
  - hyperlinks in, 57
  - importing from other programs, 40
  - including files, 64–65
  - manually transmitting, 67
  - moving and copying text, 56
  - moving between folders, 13–14
  - opening, 75
  - printing, 78
  - priority levels, 238
  - read and delivery receipts, 238
  - reading, 74–75
  - receiving, 72–73
  - receiving on mobile device, 179
  - reply to, 81
  - reviewing Sent messages and drafts, 68–69
  - saving, 77
  - sending, 66–67
  - sending to contacts, 120
  - sorting by date, 74
  - starting new, 15
- e-mail server, 71
- embedding picture in HTML e-mail message, 240
- emptying Deleted Items folder, 219
- equipment, scheduling use, 134
- Eudora, 36
  - importing from, 40

- event, nontraditional holiday as, 242
- events
  - adding file to, 141
  - adding Outlook item to, 140
  - adding to Calendar, 132–133
  - changing scheduled date, 133
  - reminders for, 144
  - updating information, 138
- Excel spreadsheet, importing data from, 226
- exception to rule for e-mail message alerts, 179
- Exchange Server
  - data in mailbox, 223
  - new features, 15
  - Outlook data storage in mailbox, 235
- Exchange Server accounts
  - configuring mobile alert settings for, 174–175
  - for free/busy time, 131
- exiting Outlook, 32
  - and emptying Deleted Items folder, 221
  - before backing up PST file, 231
- Expand the Navigation Pane button, 243
- exporting items from Outlook, 228–229

## F

- faxes, search folder for messages with attached, 211
- file formats
  - for e-mail attachments, 65
  - for saving message, 77
- File menu, 10
  - New Entry, 106
- files
  - adding object to Calendar from, 142–143, 143–144
  - adding to Calendar item, 141

- adding to contacts, 104
- adding to task, 164
- management, 205
- File tab in ribbon
  - Account Settings, 38, 95, 224, 230
    - Manage Mobile Notifications, 174, 176, 178
  - Advanced
    - Send/Receive, 72
  - Backstage view, 10
  - Cleanup Tools
    - Archive, 234
    - Mail Cleanup, 218
  - Open, Import, 36, 40, 41
    - Export To A File, 228
  - Options, 233
    - Advanced, 45
    - Print, 78, 108, 130, 169, 170
    - Save As, 77
- Filter dialog box
  - for exporting items, 229
  - for import data, 227
- filtering. *See also* Rules Wizard
  - for custom contacts view, 119
  - junk e-mail, 71, 83
- finding name in Address Book, 51
- Firefox, 36
- First Day Of Week drop-down list, 241
- flagging message for follow-up, 89
- Folder list, 8, 33
- Folder Options applet, 4
- folders, 205, 215–217
  - adding to personal, 225
  - archiving items from, 234
  - AutoArchive options, 218
  - cleaning up, 218–219
  - creating, 215
  - creating shortcuts for, 244–245
  - deleting items, 220–221

- for organizing contacts, 115–116
- for RSS feeds, 94–95
  - changing, 95
  - name changes, 94
  - moving items to, 216
- offline, 235–236
- synchronization for Cached Exchange Mode, 236
- folders in Outlook, 30, 33
  - moving messages between, 13–14
  - opening, 35
  - reviewing items, 34
- Folder Size dialog box, 219
- Folder tab in ribbon, New Folder, 115, 215
- fonts
  - changing for e-mail message, 58
  - for card headings and card fields, 119
  - for HTML stationery, 63
  - for signature, 60
- Format Text tab in ribbon, 58
  - for e-mail message, 239
- formatting e-mail message text, 49, 57–58
- forwarding
  - calendar item, 145
    - as iCalendar, 146
  - contact item, 124
  - e-mail message, 82
  - messages
    - configuring, 185
  - tasks, 171
- free time
  - calendar display of, 16–17
  - Exchange Server account for sharing, 131

## G

- Global Address List (GAL), 193

## H

- Help, 46
- hiding Navigation Pane, 243
- holidays, customizing, 242
- Home tab in ribbon
  - Address Book, 106
  - Categorize, 206
    - All Categories, 207
  - Day button, 152, 241
  - Find group, Address Book, 50
  - Forward, 82
  - Go To group, Today button, 126
  - Junk, 83
    - Block Sender, 84
    - Junk E-mail Options, 85
  - Manage Rules & Alerts, New Rule, 87
  - Meeting, 122
  - Move, 97, 217
  - New Appointment, 129
  - New E-mail, 48, 238
  - New Items, 52
  - New Meeting, 134
  - New Task, 156
  - Reply, 81
  - Reply All, 81
  - RSS, Download Content, 93
  - Rules, Manage Rules And Alerts, 86
  - Week button, 152
- HTML, 77
  - for e-mail message, 239, 240
- HTML Message format
  - for e-mail message, 57
- HTML stationery, 62–63
  - editing, 63
- hyperlink
  - in e-mail messages, 57
  - inserting file as, 164, 165

## I

- iCalendar, 145, 146
- IMAP services, 36
- importing
  - e-mail accounts, 36–37
  - from another program, 40–42
  - items into Outlook, 226–227
- Inbox, 6, 33, 74, 215
  - calendar preview from, 18–19
  - follow-up flag, 90
  - keeping open with Contacts open, 102
  - managing, 76–78
  - opening, 8, 13
- Inbox view, 30
- infected attachments, 79
- information management, 205
- inserting
  - file in calendar item, 141
  - item in contact record, 103–104
  - items into tasks, 162–165
  - objects, files and items in Calendar item, 140
- inserting pictures in e-mail message, 64
- Insert Item dialog box, Text Only option, 140
- Insert Object dialog box, 143
- Insert Picture dialog box, 64, 240
- Insert tab in ribbon
  - Attach File, 165
  - Attach File button, 141
  - Attach Item, 103
  - Illustrations group
    - Picture, 240
  - Include group
    - Attach File, 65
    - Outlook Item, 162
  - Picture, 64
  - Text group, Object, 142

- installing Outlook, 2
- instant message, 21
- instant messaging session, starting, 201
- Instant search, 113
- interface
  - Navigation Pane, 8–9
  - new features, 6–12
  - ribbon, 6–7
  - views, 12
- Internet connection, 183
- Internet Explorer, 174
- Internet service provider (ISP), 36
- invitation
  - calendar preview for, 18–19
  - sending, 20
- invitation to meeting, 135
- italic text, 58
- items
  - clearing category from, 210
  - dragging to create shortcuts, 246
  - exporting from Outlook, 228–229
  - importing, 226–227
  - inserting in contact record, 103–104
  - moving to folders, 216
  - moving without dragging, 217
  - restoring, 232
  - selectively copying between computers, 227

## J

- jargon, 1
- journal entries, 34
- junk e-mail, 83–85
  - filtering, 71
  - fine-tuning, 85
- Junk Mail Senders List, adding to, 84–85



## L

- Library tab in ribbon, Connect & Export, Connect To Outlook, 196
- LinkedIn, 22
- local data file, 224
- locating new messages, 74
- location
  - for backup files, 230
  - for calendar event, 133

## M

- macros, adding to Quick Access Toolbar, 251
- Mailbox Cleanup Tool, 218–219, 219–220
- Mail icon, 8, 182
  - Search Folders branch, 211
- MailTips feature, 15
- Manage Mobile Notifications option, 174
- Map Custom Fields dialog box, 42
- maps, displaying for contact, 110
- marking RSS feed messages, 96
- Master Category list, categories deleted from, 208
- meetings, 34
  - adding file to, 141
  - adding Outlook item to, 140
  - changing date and time, 136
  - creating, 134–135
  - preview, 18–19
  - recurring, 123, 125
  - reminders for, 144
  - request for, 19, 20
  - rescheduling, 139
  - scheduling with contacts, 122–123
- Meeting Series tab in calendar, 146
- Meeting tab in ribbon
  - Forward button, 145
  - Forward As ICalendar, 146
  - Show group, Scheduling Assistant, 134
  - Tracking button, 139
- messages. *See* e-mail messages; *See* text messages
  - instant, 201
  - managing threads, 205
  - search folders for locating, 211
- messages in RSS feeds
  - management, 96–98
  - marking and unmarking, 96
  - moving between folders, 97
- Message tab in ribbon, 6
- Microsoft Exchange Server, 36
- Microsoft Exchange Server 2010 mailbox, 175
- Microsoft Outlook Express, 36
- Microsoft SharePoint, 187. *See also* SharePoint
- Microsoft Word, 57
- Minimize the Navigation Pane button, 243
- minimizing Navigation Pane, 243
- mobile devices
  - alerts to, 173
  - Calendar alerts setup, 176–177
  - configuring alert settings for Exchange Server accounts, 174–175
  - configuring message forwarding, 185
  - receiving e-mail on, 179
  - reminders setup, 184
  - sending alerts from Outlook, 183–185
  - server alerts to, 26
- mobility, 26–28
- Month view for calendar, 126
  - events in, 138
- mouse, 4
- Move Items dialog box, 217

- moving
  - e-mail message text, 56
  - items to folders, 216
  - items without dragging, 217
  - messages between folders, 13–14
  - RSS feed messages between folders, 97
- MSN Messenger, 199

## N

- names
  - changes
    - for categories, 209
    - for search folders, 214
  - finding in Address Book, 51
  - for contacts folders, 116
  - for custom ribbon tabs, 249
  - for RSS feed folder, 94
  - of tasks, 153
- Navigation Pane, 8–9
  - archive display, 15
  - Calendar icon, 16, 126
  - collapsing, 30
  - Contacts icon, 105, 109, 110
  - customizing, 243–247
  - Drafts folder, 69
  - expanding, 9
  - Folder List button, 216
  - folders access with, 33
  - Inbox, 6, 75
  - Mail button, 74
  - Mail icon, Search Folders, 212
  - opening folder, 35
  - RSS Feeds, 92, 93
  - Sent Items folder, 68
  - Shortcuts pane, 244
  - showing or hiding, 243
  - sizing, 127

- Tasks, 151
  - Team branch, 16
- Netscape, 36
- network servers for linking files in tasks, 164
- New Entry dialog box, 106
- news feeds. *See* RSS feeds
- New Signature dialog box, 60
- non-Outlook items, shortcuts for, 247
- notes, 34
- notifications of Calendar updates, 177

## O

- objects, adding to calendar item from file, 142–143
- Office Communications Server (OCS), 187
- Office Communicator, 121, 187, 199
  - for voice call, 203
- Office themes for messages, 62
- offline folders, 235–236
- Offline Help, 46
- Online Help, 46
- online status, viewing, 199–200
- opening
  - attachments, 79
  - e-mail messages, 75
- Options dialog box
  - Advanced, 67
  - Advanced page, 45
  - Mail, 59
  - Mobile page, Configure Forwarding, 185
- Options tab in ribbon
  - Bcc, 6–7
  - Show Fields, Show Bcc, 160
- organization for contacts, 115–119
  - with categories, 117
- organization of data, 205. *See also* folders
- Outbox, 67
  - placing message in, 66
- Outbox folder, 215
- Outlook
  - installing, 2
  - multiple options for tasks, 2
  - starting and exiting, 32
- Outlook data files, 223, 224–225
  - archiving, 233–234
  - archiving to, 234
  - importing data to, 226–227
  - restoring from backup, 232
- Outlook Express, importing from, 40
- Outlook item, 34–35
  - adding to calendar item, 140
  - adding to task, 162–163
  - opening, 35
- Outlook item window, overview, 31
- Outlook Journal, 121
- Outlook Options dialog box, 233
- Outlook profile, local data file for, 224
- Outlook program window, overview, 30
- Outlook rules, 71
- Outlook Social Connector for SharePoint, 198
- Outlook Today view, 43

## P

- paper clip icon, 79
- paragraph, creating in e-mail, 49
- People Pane, 22–23, 198
- % Complete property of task, 154, 158
- permissions in SharePoint calendar, 191
- personal folder file, 223
- Personal Folders dialog box, 231
- phone call to contacts, 121

- pictures
  - including in HTML e-mail message, 240
  - inserting in e-mail message, 64
- Plain Text, for e-mail message, 239
- pocket PC, alerts to, 173
- POP3 services, 36
- predefined search folders, 211
- Presence Display, turning on, 199
- presence of users online, 21
- Preview Pane, View Article, 98
- Print dialog box, 108, 169
- printer, selecting for calendar printing, 148
- printing, 10–11
  - appointments, 130
  - calendar, 147–148
  - calendar item, 148
  - e-mail message, 78
  - task item, 170
  - task list, 169
- priority levels for e-mail messages, 238
- Private button for tasks, 154
- project category, 205
- Prompt Before AutoArchive Runs option, 233
- PST files, 223
  - backup of, 230–231
  - creating, 224–225
- publishing calendar, 17

## Q

- Question Mark button, 46
- Quick Access Toolbar, 7, 30, 251
  - Quick Print, 78
  - Undo Flag, 152
- Quick Print, 170
- Quick Steps, 13, 205

## R

- reading e-mail, 74–75
- Reading Pane, 34
  - RSS feed preview in, 93
  - sender's online availability display in, 200
  - turning off, 75
- reading RSS feed article online, 98
- read receipts for e-mail messages, 238
- Really Simple Syndication (RSS). *See* RSS feeds
- receiving e-mail, 72–73
- recovering deleted messages, 76
- recovery from backups, testing, 234
- recurring appointments, 137
- recurring meetings, 123, 125
- recurring tasks, 156–157
- “RE:” in subject line, 81
- reminders, 144
  - for meetings, 123
  - for tasks, 150
  - setting up for mobile devices, 184
  - sound for, 155
- removing. *See* deleting
- reply to e-mail, 81
- Request A Delivery Receipt option, 238
- Request A Read Receipt option, 238
- resizing. *See* sizing
- resources, scheduling use, 134
- retention policies, administrator settings for, 233
- reversing sort order of messages, 74
- ribbon, 30. *See also* names of individual tabs
  - adding tab, 249–250
  - new features, 6–7
  - turning on or off, 248

- Rich Site Summary. *See* RSS feeds
- Rich Text, for e-mail message, 239

- Rich Text Format
  - and HTML stationery, 62
  - for e-mail message, 57
- RSS Feed dialog box, 92
- RSS feeds, 91
  - adding automatically, 92
  - downloading full article, 98
  - folder name changes, 94
  - folders for
    - changing, 95
    - for calendar updates, 189
    - message management, 96–98
    - viewing, 93
- Rules Wizard, 86–88
  - creating rule based on message, 86
  - creating rule from scratch, 87–88

## S

- saving
  - attachments to e-mail, 80
  - e-mail messages, 77
- Scheduling Assistant, 134, 136
- Search Folder Criteria dialog box, 212
- search folders, 211–214
  - creating custom, 212–213
  - modifying, 214
- searching
  - for activities associated with contact, 109
  - for contacts, 112–114
  - for older messages during cleanup, 219
- Search tab in ribbon, 24–25
- Search Tools in ribbon, 114
- selected tasks, printing list, 169
- Select Members dialog box, 52
- Select Names dialog box, 48, 55

- sender
  - removing from Junk Mail list, 85
  - sorting e-mail by, 74
- sending
  - e-mail messages, 66–67
  - invitation to meeting, 20
  - text message, 28
- sending text messages from Outlook, 182
- Send/Receive tab in ribbon
  - Send/Receive All Folders, 73
  - Send/Receive Groups, 73
- Sent messages, reviewing, 68
- server alerts to mobile device, 26
- Setup Wizard, 2
- SharePoint
  - adding calendars to Outlook, 188–192
    - connecting SharePoint 2007 calendar, 190
    - connecting SharePoint 2010 calendar, 188–189
  - contacts use in Outlook, 193–195
  - creating calendar items in Outlook, 191–192
  - creating contact from Outlook, 194–195
  - document libraries use in Outlook, 196–197
  - Outlook Social Connector, 198
- SharePoint Lists, 8
- SharePoint Workspace, 197
- sharing contact group, 52
- sharing information
  - for tasks, 169
  - from Calendar, 145–146
- shortcut for Outlook, 32
- shortcuts
  - creating for folder, 244–245
  - dragging items to create, 246
  - for non-Outlook items, 247
  - for Web sites, 245

- Show Columns dialog box, 118
- signatures, 59–61
  - choosing, 61
- Signatures and Stationery dialog box, 59, 63
- Signatures And Stationery dialog box, 61
- Simple List View for tasks, 150
- sizing Navigation Pane, 127
- SMS provider, 26, 28
- SMS service account, 180
- social networking, 22, 198
- software
  - creating shortcut for, 247
  - for opening attachments, 79
- sorting
  - e-mail by date, 74
  - task list, 151
- sound for reminder, 155
- spam, 36, 83. *See also* junk e-mail
- spreadsheet
  - embedding portion in appointment, 142
  - importing data from, 226
- starting Outlook, 32
- Start menu, Programs/Startup folder, 32
- Startup view, 45
- stationery, HTML, 62
- status bar, total number of e-mails and unread e-mails on, 73
- status of task, changing, 155
- Status property of task, 154
- status report for assigned task, 167, 168
  - sending, 160–161
- strikethrough, for completed tasks, 158
- subfolders
  - creating, 215
  - moving items to, 216

- subject
  - for calendar event, 133
  - of meeting invitation, 135
- Subject field for e-mail message, 49
- surveys on Web sites and junk e-mail, 84
- synchronization of document library, 196
- synchronization of folders for Cached Exchange Mode, 236

## T

- tabs in ribbon
  - adding, 249–250
  - turning on or off, 248
- task item, printing, 170
- Task Item Window, opening, 150
- Task Recurrence dialog box, 156, 157
- tasks, 34
  - adding file to, 164–165
  - assigning to another, 166–168
    - accepting or rejecting, 168
  - assigning to contacts, 122
  - deleting completed, 159
  - forwarding, 171
  - inserting items into, 162–165
  - marking as complete, 158
  - modifying and updating, 158–161
  - opening, 43
  - printing list, 169
  - recurring, 156–157
  - reminders for, 150
  - sending status report for assigned, 160
  - setting or changing properties, 154–155
  - sharing information for, 169–171
  - viewing, 150–152
- Tasks folder, 149, 150
  - adding task, 153–155
  - opening, 151

- Task tab in ribbon
  - Follow-Up, Add Reminder, 150
  - Manage Task
    - Assign Task, 166
    - Send Status Report, 160
  - Respond, Forward, 171
  - Show group, Details, 150
- telephone call to contacts, 121
- text messages
  - for alerts, 26–27, 27–28
  - sending, 28
  - sending from Outlook, 182
- Text Messaging Notifications dialog box, 176
- text messaging service, setting up, 180–181
- text wrap, 49
- today, returning to in calendar, 127
- Today view, 152
- To-Do Bar, 126, 128, 150
- to-do list. *See* Tasks folder
- tracking time consumed on phone calls, 121

## U

- UNC path, 164
- underlined text, 58
- undoing
  - deleted contacts, 112
  - deleted message, 76
  - deleting items, 220
  - moving item, 217
- unified messaging, 175
- unmarking RSS feed messages, 96
- Unread Mail search folder, 212
- unread messages
  - number indicator on status bar, 73
  - search folder for, 211
- user interface. *See* interface

## V

- vCard format, 124
- video session, 203
- viewing RSS feeds, 93
- View menu, Reading Pane, 74
- views, 12, 43–45
  - customizing for contacts, 118–119
- View tab in ribbon
  - Change View, 12, 44, 105, 111
    - Simple List, 158
  - Layout, To-Do Bar, 128
  - Reading Pane, 22, 198
  - View Settings, 118
- virus, e-mail attachment infected with, 79
- voice call, 202–203
- voice conferencing application, 121
- voice conferencing call, 21
- voice mail, search folders for messages
  - with, 211
- VoIP phone, 121, 202

## W

- Web sites, creating shortcuts to, 245
- Web site surveys and junk e-mail, 84
- week, displaying in calendar, 126
- weekend days, displaying in calendar, 17, 127
- Week view
  - events in, 138
  - vs. Work Week view, 17
- Windows Live, 22
- Windows Live Hotmail, 36
- Windows Live Messenger, 199
- Windows Mail, 36
  - importing from, 40
- Windows Messenger, 199
- work hours, changing, 241
- Work Week view, 127
  - customizing settings, 241
  - vs. Week views, 17

## About the Author

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