plain simple

Microsoft Outlook 2010

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

Jim Boyce
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What do you think of this book? We want to hear from you!

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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.

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Managing a Calendar

The 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)

1. Type a description of the appointment in the Subject box.
2. Type the location of the appointment in the Location box.
3. Click the down arrow to the right of the Start Time date, and select the day of the appointment.
4. Click the down arrow to the right of the Start Time hour, and select the starting time of the appointment.
5. 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.
6. Click the down arrow to the right of the End Time hour, and select the ending time of the appointment.
7. Add notes if you want.
8. 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

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.

**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.

See Also

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

1. Click the Calendar icon on the Navigation Pane.
2. 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.)
3. Make changes to the appointment.
4. 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.
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.

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.
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