

# WITH OUTLOOK

2000–2003  
November 2006

## Personalize the Outlook bar so needed items are a click away

Most Outlook users use Outlook pretty much as it comes out of the box. That's too bad, however, because much of Outlook's power and strength comes only when you work outside the box, so to speak. For example, you can customize the Outlook Bar to meet your needs—not just the needs Microsoft thought you'd have.

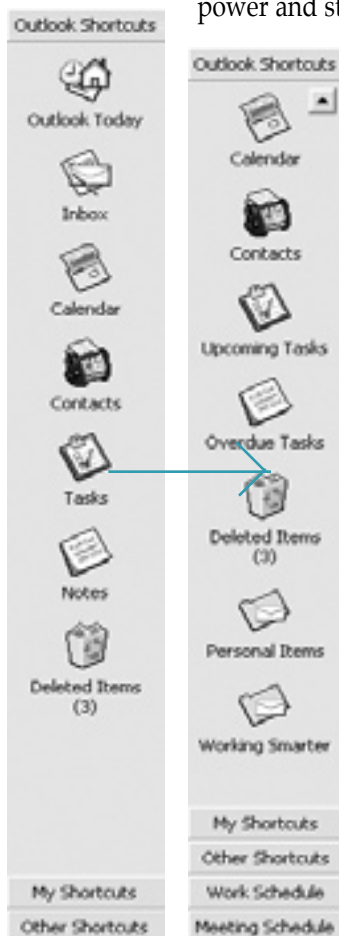


Figure A

### Outlook Bar groups

Outlook comes with three default Outlook Bar groups:

- **Outlook Shortcuts.** These include shortcuts to *most* of the default Outlook folders, including: Outlook Today, Inbox, Calendar, Contacts, Tasks, Notes, and Deleted Items. The default Outlook Shortcut bar and my customized Outlook bar are displayed in **Figure A**. You can customize your Outlook bar to meet your needs.

- **My Shortcuts.** These include shortcuts to all of the other default Outlook folders, such as Drafts, Outbox, Sent Items, Journal, and Outlook Update.

- **Other Shortcuts.** These include shortcuts to the file system: My Computer, Personal or My Documents, and Favorites.

Just because this is the way Outlook comes, however, doesn't mean you're limited to keeping it this way. ▶

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## Coming next month...

- Outlook tips to make your next meeting a rousing success
- Take a poll with Outlook's voting buttons

## Personalize the Outlook bar

(continued from page 1)

### Quick-start your day by having Outlook launch when you start your computer

If the first thing you do when you turn on your computer every morning is launch Outlook, why not launch it automatically instead? All you need to do is add an Outlook shortcut to the StartUp folder.

Create a shortcut to Outlook on your desktop, if you don't already have one. To do so, choose Start | All Programs | Microsoft Outlook. Right-click on Microsoft Outlook and choose Create Shortcut, as shown in **Figure A**. Drag the newly created shortcut to your desktop. Navigate to the \Document And Settings\All Users\Start Menu\Programs\StartUp folder in Windows Explorer. Drag the Outlook shortcut from your desktop to this folder. The next time you start up your computer, Outlook automatically launches.



Figure A

### Here's a super fast way to refresh your Inbox

By default, the Send/Receive button is located only on the Standard toolbar when a Mail folder is active. Therefore, when you want to check for new mail or send an item immediately, you probably switch to a Mail folder and click the button. Not necessary! Just press [F9] to run a Send/Receive.

### Add folder shortcuts to the Outlook Bar

If the Outlook Bar is displayed when you create a folder, Outlook automatically offers to add a shortcut to the Outlook Bar, as shown in **Figure B**. If you choose "No" or didn't have the Outlook Bar open, you can add a folder shortcut at any time.

Choose View | Folder List to display the folder list. Using the left mouse button, drag the desired folder from the Folder List to the target Outlook Bar group. If the target group is not open, then move the mouse pointer over the desired group and wait for that group to open. Then move the mouse pointer to the desired location; when a horizontal

line displays, showing that the item can be dropped, drop it.

To remove a shortcut, right-click on it in the Outlook Bar and choose Remove From Outlook Bar; click Yes to confirm the deletion.

### Add, remove, rename groups

To add a new Outlook Bar group, right-click in the Outlook Bar anywhere other than on an existing shortcut, then choose Add New Group. To remove or rename a group, right-click and choose the desired action.

### Reorganize the Outlook Bar

You can also rearrange the furniture within the Outlook Bar. To move a shortcut from one location to another, simply drag it and drop it in the new location. As mentioned previously, if you hover the mouse pointer over an unopened group, it will open. To copy a shortcut, hold down the Ctrl key as you drop. ■

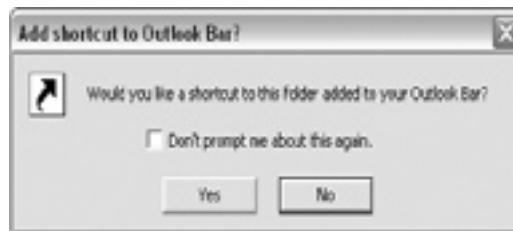


Figure B

## T.O.P.S. AWARD



Are you *T.O.P.S.* (The Office Problem Solver) in your office? Surely you've encountered many challenges in your job. Is there a task or project in Microsoft Outlook that you or a coworker found particularly difficult and then successfully solved? We want to hear about it.

Submit your story and examples of your work, and we'll choose a T.O.P.S. winner based on creativity and resourcefulness. We will announce the winner and print their story in a future issue. The winner will receive a free 6-month subscription to one of our other publications. Check out our titles at <http://www.workingsmartertraining.com>.

Email your submissions to [editor@working-smarter.com](mailto:editor@working-smarter.com) with the subject line, "The Office Problem Solver."

# Make yourself known with a digital ID— and look professional to boot

**D**o you use an email signature? You probably should. By including a signature, it will be easier for your recipients to contact you, should they have questions. Your email address and phone number will be listed right there for easy access.

## Your default identity

Some email programs show only the email address—which might or might not tell the recipient who sent it. Others even show a variation of your email address—one you might not even know you have. This is especially true when your normal email address is a simpler alias alternative for a more technically precise address. Your simple email address might actually appear as something incomprehensibly uninformative to your email correspondents, perhaps a string of numbers.

That's why it's usually important to include an email signature like the one shown in **Figure A**. Depending on the nature of your correspondence, your business email address, at minimum, should include your name, job title, company (if appropriate), and email address. You might also add your web page URL (if you have one) and your phone number.

**Smart Idea:** If, like many users, you like to include pithy quotes in your signature, choose them carefully. Like a bumper sticker, what amuses some may offend others.

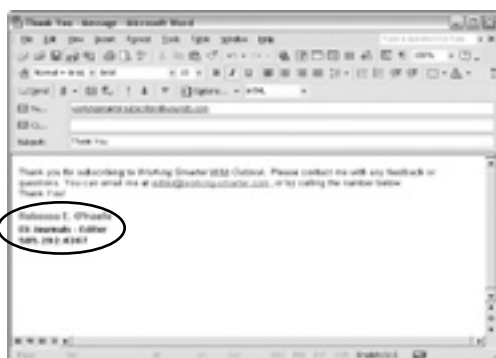


Figure A

## Setting the signature

You can tell Outlook to automatically include a signature in email you send. Any formatting you apply to the signature will be used only when sending formatted email.

Choose Tools | Options, then click on the Mail Format tab. Click the Signature button, then in the Create Signature dialog box, click New.

Type a name for your signature in the first text box, as we did in **Figure B**. Then, choose to start with a blank signature or an existing signature (already created or as exists in a text file) as a template. Make your selections and click Next. Type and/or modify the signature as desired. Click Finish.

In the Create Signature dialog box, select the signature you created and note the preview. With the desired signature selected, click OK.

Now when you send a message, and reply to or forward a message, your signature is automatically appended. ■



Figure B

## Quickly launch a contact's web page directly in Outlook

Outlook provides a field on the Contact form for recording your contacts' web page addresses. If you order supplies directly from a purchasing agent's website, for example, it's useful to store that website address with the agent's contact information in Outlook. This way, the information is right at your fingertips.

To add a web page address to a contact, click on the Contacts folder in the Folder List (or click on the Contacts icon in the Navigation Pane in 2003). Next, double-click on the contact for which you'd like to add a URL and click on the General tab. Click in the Web Page Address text box, enter the URL as shown in **Figure A**, and click Save And Close.

To launch the Web page without leaving Outlook, open the Contact and click on the link in the Web Page Address text box of the Contact form. Your web browser then launches and takes you to the website.

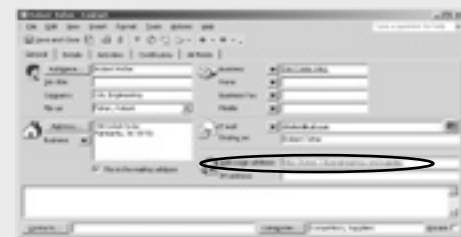


Figure A

## Easily compare two calendars side by side

A useful feature in Outlook 2003 is the side-by-side Calendar display, and it's simple to activate. Perhaps you like to keep separate personal and professional calendars in Outlook. Right-click on the Calendar check box in the My Calendars List, then choose New Folder from the shortcut menu.

Enter a name for the new Calendar, such as Personal, in the Name text box of the Create New Folder dialog box. Then, click OK. Now, all you need to do to display these two calendars side by side is select their corresponding check boxes in the My Calendars List. That's all there is to it!

## Avoid policy disputes: Display your company rules in a publicly accessible folder

**K**eeping your employees up to date on company policies and procedures is an absolute must. If you don't, you could face legal difficulties if you encounter a personnel problem. Rather than risk a lawsuit, store your most recent information in Outlook's public folders for everyone to access—we'll show you how.

### What is a public folder?

A public folder, available in Outlook with Microsoft Exchange Server, appears in your Folder List and allows you to share all sorts of items: email messages, Calendars, Microsoft Word documents, Contacts, and so on. Outlook has three public folders set up by default, Favorites, All Public Folders, and Internet Newsgroups, as shown in **Figure A**. For our example, we'll create a public folder that all employees have access to, which contains our company's Human Resources information, such as procedural documents, payroll forms, the company's holiday calendar, and even message boards.

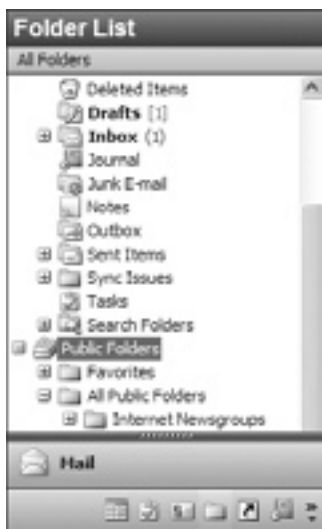


Figure A

### Get started with public folders

There are two ways to create public folders: through Outlook and through the Exchange System Manager. In this article, we'll create public folders from within Outlook. We'll assume that you have permissions to create public folders on your server (your Exchange Administrator must grant you those rights).

### If you can't create a public folder:

If you're unable to follow along with our techniques, ask your Administrator to grant you the necessary rights. Often, companies limit public folder creation privileges for security reasons.

### To create a public folder:

1. In the Folder List view, click on the plus sign (+) next to Public Folders to expand it.
2. Right-click on the All Public Folders folder and choose New Folder to display the Create New Folder dialog box.
3. Enter a name in the Name text box for the public folder. We entered Human Resources, since we're creating a folder to house all of the company's human resources forms and procedures documentation.



Figure B

4. Choose which types of items to store in the folder from the Folder Contains drop-down menu. We chose Mail And Post Items (Mail Items in 2000) since we'll include items such as Outlook forms, Microsoft Word documents, Microsoft Excel spreadsheets, and postings.

5. Choose a location for the new public folder from the Select Where To Place The Folder list box. We want this folder to be a subset of the All Public Folders folder, so we'll leave it as is.

6. Click OK once you've made your selections. If Outlook asks if you'd like to include a shortcut to this folder in the Outlook Bar, click No.

We now need to set the permissions that we want to grant for our new public folder. To keep control of the contents of a public folder, it's wise to specify permissions to particular groups or individuals.

### Change permissions right away:

Each public folder grants authoring permissions to all users by default. Be sure to change these rights to suit your needs right away so you don't accidentally neglect to do so. There are three presets: Owner is the person who created the public folder; Default includes everyone authenticated on the server; and Anonymous includes everyone that connects to the server without authenticating.

### Determine who can access your public folder

To make the most of a public folder, you can set different permissions for different users. We'll give the Human Resource department employees full authoring access so they can update the data in the folder. We'll give all other users the right to read the documents but not alter them.

**To set public folder permissions:**

1. Right-click on the previously created Human Resources public folder in the Folder List and choose Properties.
2. Click on the Permissions tab, as shown in **Figure B**.
3. Select Default in the list box, and then choose Reviewer from the Permission Level dropdown menu. The selected options in the Permissions section change to reflect the chosen level.
4. Click the Add button, and in the Add Users dialog box, choose the individual or group for which you'd like to set permissions from the Name list box. In our case, we'll select Human Resources.
5. Click Add, then click OK to return to the Permissions tab in the Properties dialog box.
6. Choose Publishing Author from the Permission Level dropdown menu in the Permissions section to give everyone in the Human Resources distribution group the right to create, edit, and delete all items in the folder.
7. Click OK to close the Properties dialog box.

**Put your public folder into action**

Now that you have your public folder set up, you can store your documents, email messages, or any other file type you specified when you created the folder. Simply drag and drop your files from within Outlook or from a Windows Explorer window.

If you have a file that requires further explanation, you can create a post and attach the file to it. **Figure C** shows a public folder containing a post with an attached file, a document, and a post without attachments.

**Another use for public folders:** You can create a public folder related to a single project, and limit access to individuals who work directly on that project.

**To create a public folder post:**

1. With the public folder selected, click on the New button's dropdown arrow on the Standard toolbar, and then select Post In This Folder to open a blank Discussion form, as shown in **Figure D**.
2. Fill in the Subject line and body of the post.
3. If desired, click the icon to attach a file. Navigate to and select the file, and then click Insert.
4. Select File | Post to add the posting to the public folder and close the Discussion form.

Now that you have your public folder and its contents set up, you can email your company employees and alert them to the presence of the new folder. ■

**About inserted files:** When you attach a file to a post, you're attaching a copy only. If you make changes to the attached file, you aren't altering the original—the files aren't linked.



Figure C

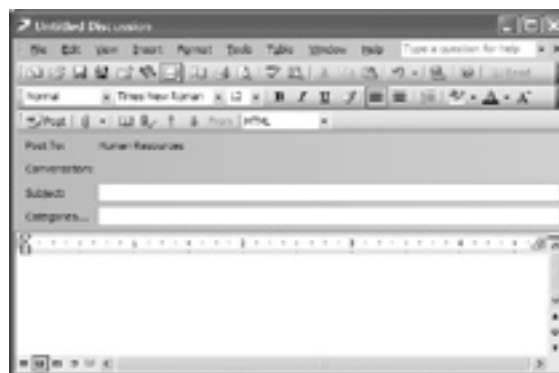


Figure D

**Easily assign a category to a group of existing Contacts**

Perhaps you've imported a group of Contacts from Microsoft Excel, and you now want to add a category to each of these contacts. Click on the Contacts icon in the Navigation Pane (click on the Contacts folder in the Folder List in 2000 and 2002). Select each Contact entry that you want to add to a category by clicking on each Contact entry and holding down the [Ctrl] key. Then, select Edit | Categories from the Outlook menu bar. Next, select a check box from the Available Categories list box in the Categories dialog box. Or, enter a custom category in the Item(s) Belong To These Categories text box, and then click Add To List. Click OK to close the open dialog box. This adds the category to all the selected Contacts in one easy step.

**Be considerate: Block off your Calendar when you're away**

If you're on vacation, on a business trip, or otherwise unavailable for meetings, it's a good idea to block off these days and times on your Outlook Calendar. This way, others who have access to your free/busy times in Outlook don't try to schedule meetings with you for these times when you're actually not available.

Open your Calendar and click on a day that you'll be unavailable. Open a new Appointment form, and select the All Day Event check box. Select Out Of Office from the Show Time As dropdown list. Enter the effective start and end dates in The Start Time and End Time text boxes—the event can span multiple days. Enter a subject, and then click the Save And Close button.



## Turn to the Print dialog box to customize Calendar print settings

**Q** How can I print a blank calendar for a whole year? My coworkers don't think it's possible, but I'm sure there's a way—I just don't know how.

**A** Display the Calendar. Press [Ctrl+Shift+E] to create a folder. In the Name text box, type *Blank Calendar*, then click OK. If the Outlook Bar is displayed, you are asked if you want a shortcut to this new folder created in your Outlook Bar; click No. In the Folder List, choose Blank Calendar. If you want to close the Folder List, click the Close button.

Click the Print button. In the Print Style panel, select Monthly Style, then click the Page Setup button. Click on the Format tab. In the Options panel, deselect all three check boxes in the Include section, as shown in **Figure A**. Make sure that the Don't Print Weekends check box is not selected (unless that's what you explicitly want) and that the Print Exactly One Month Per Page check box is enabled. Select your desired options on the Paper and Header/Footer tabs. Finally, click Print. In the Print Range panel in the Print dialog box, set the desired Start: and End: dates to reflect the year to print. Click OK.



Figure A

## What to do when holidays go missing in your Calendar

**Q** When I created a new calendar folder, holidays were not automatically included. How can I add holidays?

**A** You must copy them from the main calendar, assuming they're already there. Display Outlook's Calendar and choose View | Folder List. Click the down arrow next to Calendar to display the subfolders.

In the Advanced toolbar's Current View dropdown list, choose Events, as shown in **Figure B**. Click the Location field heading to sort events by location. Scroll down until you see the location for the holiday set you want to copy (e.g., United States). Select all of the displayed holiday events. Using the right mouse button, drag the selected events into the Folder List and drop them onto the new calendar where you want them to be. Click Copy.

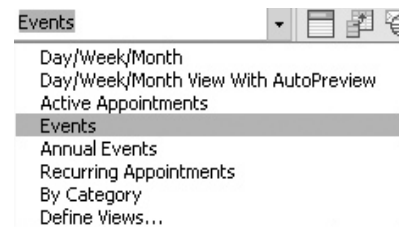


Figure B

## Tell friends to get onboard with Outlook for easy file sharing

**Q** I want to share my Notes folder with a non-Outlook user. When I go through the steps, the Minimum permissions button is not available. Why not?

**A** You can share only message folders with non-Outlook users. Other Outlook items are in a format that's understood only by Outlook.

As an alternative, you can send your notes directly, as an attachment to an email message, which will appear as an email message to the recipient. Note that you can't automate this process; you

must send new notes each time a change occurs. If you find yourself sending multiple attachments to the same person, it might be easier to persuade your correspondent to get Outlook!

## Tweak your Current View to find MIA messages

**Q** Yesterday, my Inbox had two new messages. Today, there was one new message, but the two from yesterday are gone! Why did this happen? And how can I get those messages back?

**A** Open the Advanced toolbar's Current View dropdown list and make sure that a general view such as Messages is selected, rather than a restricted view such as Unread Messages or Today's Messages.

The latter views display only messages you have not yet read or those you've received today. The other messages are still there; they're simply hidden from view.

## Automatically customize your folder view in one sweep

**Q** The default for message folders is to have a Received column. I prefer a Sent column so that I can sort my replies with other mail. While I can delete the Received column and add the Sent column, I have several hundred folders. Is there a way to automatically format all folders at once?

**A** Choose View | Current View | Define Views. Select the view (e.g., Messages) you want to modify and click Modify, then click Fields. In the list of available fields, double-click on Sent. Under Show These Fields In This Order, double-click on Received. If you wish, drag the Sent field to another location. Click OK twice.

Back in the Define Views For dialog box, click Apply View. The change takes effect everywhere that view is used, unless you've modified the view for a specific folder. ■

## Expose secrets with Internet Headers

Most users know email headers as the To, Cc, Bcc, From, and Subject fields displayed at the top of an email you're composing or reading. For more technically inclined users, however, Internet Headers are the entire message header area used in transmitting and receiving an email message.

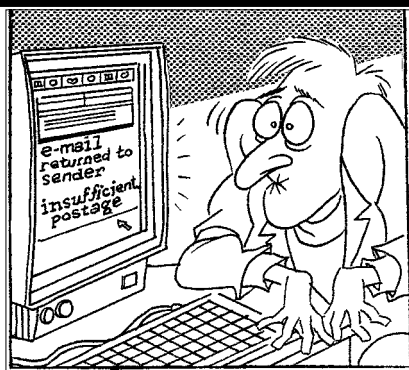
When transmitted over the internet, emails don't have the format you see in Outlook. Instead, there's a large header area with a variety of fields, such as From, Received, Message-ID, X-Sender, X-Mailer, Date, To, Subject, Mime-Version, Content-Type, X-RCPT-TO, X-UIDL, and Status. The basic headers you normally see in Outlook have been culled from the larger collection.

It's helpful to look at email headers, e.g., suppose you use Outlook to retrieve email from multiple sources. If somebody uses Bcc (blind carbon copy) to include you as a recipient, you can't tell from the header what email address they used. But, you can tell by looking at the full header area.

### View the full header

To see the full header area for an email message, choose View | Options, then look in the Internet Headers field. If you click the Help tool in the top-right corner of the Message Options dialog box and click in the Internet Headers field, Outlook displays a tooltip that says the field *Displays every transaction that has occurred for a message from the Internet ....* You can use this data for troubleshooting as well as for tracking down the source of a particular piece of junk email. ■

## LOOK OUT!



What if e-mail required postage?

# TEST YOUR PC IQ

## What's the scope of Outlook's power? Do you know its limits?

For each statement below, indicate whether it is true or false.

### True or False

- 1. Outlook can't run macros.
- 2. Outlook and Outlook Express can access the same personal folders and files (although not at the same time).
- 3. Outlook and Exchange Client can access the same personal folders and files (although not at the same time).
- 4. In order for appointment and event alarms to sound, they must be in the top level default calendar.
- 5. Message Flag For Follow-up reminders can sound regardless of what folder the messages are in.
- 6. In customizing toolbars, you cannot modify the top menu bar; only actual toolbars can be modified.
- 7. Outlook 2000 can access http mail, but only when used in Internet Mail Only mode.
- 8. When running in Corporate or Workgroup mode, Outlook lets you select which SMTP server to use for sending email.

### Answers

1-F 2-F 3-T 4-T 5-F 6-F 7-F  
(Outlook 2000 cannot access http mail accounts at all) 8-F  
(only in IMO mode)

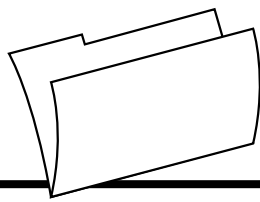
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## Create reminders to help you follow up on critical email

We've all been there—it's the end of the day and you forgot to respond to a critical or time-sensitive email message. With the help of Outlook reminders, you can ensure you don't make the same misstep again.

### Create a reminder

Outlook can launch reminders to let you know that action is required for any number of things: responding to an email message, returning a call to a client, or notifying you of an upcoming meeting or appointment—the list goes on and on.

### To set a reminder to reply to a message:

1. Click on the Mail icon in the Navigation Pane, and then click on the Inbox folder in the All Mail Folders list (click on the Inbox folder in the Folder List in 2000 and 2002).
2. In the Message list, right-click on a message for which you'd like to set a reminder.
3. Select Follow Up | Add Reminder (just Follow Up in 2002 and Flag For Follow Up in 2000) from the resulting shortcut menu to display the Flag For Follow Up dialog box shown in Figure A.

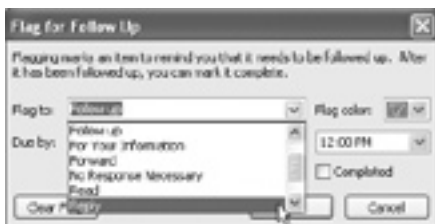


Figure A

4. Make a selection from the Flag To dropdown menu. For our example, we'll select Reply, but several of the other choices would do the trick as well.
5. Select a date and time from the Due By dropdown menus, and then select a flag color from the Flag Color dropdown list (in 2003 only).
6. Click OK to add the reminder.

**Tip:** Create a system in which specific flag colors represent urgency or importance. For example, you can use red flags for critical items and yellow flags for personal obligations.

When the Reminder dialog box displays, you have a few options:

- Click Dismiss to close the Reminder dialog box and not show the reminder again in this Outlook session.
- Click Snooze to display the reminder again in the time designated in the Click Snooze To Be Reminded Again In text box.
- Click Open Item to launch the email message to which the reminder is associated.

**Note:** Outlook 2002 and 2003 show all reminders in one window. In 2000, each reminder pops up in its own window.

### Remove a reminder

Once you've responded to an email, it's a good idea to remove the associated reminder. Otherwise, you'll continue to receive the reminder during each Outlook session, even after the due date has passed. To remove the reminder:

1. In the Message list, right-click on a message for which you'd like to remove a reminder.

2. Select Follow Up | Flag Complete (Flag Complete in 2000 and 2002) from the resulting shortcut menu. In 2003, the flag now becomes a check mark.

### Set Reminder options

Outlook can prompt you with a visual reminder, an audio reminder, or both. To choose these reminder options:

1. Choose Tools | Options, then click on the Other tab.
2. Click the Advanced Options button and then click the Reminder Options button.
4. In the Reminder Options dialog box, select or deselect the Display The Reminder and Play Reminder Sound check boxes. If necessary, select a different sound file to use by clicking the Browse button.
5. Click OK three times to close the dialog boxes.

### Use the Flag For Follow Up feature in 2003

Outlook 2003 offers access to the Flag For Follow Up feature right in the Message list area. This feature lets you quickly mark items with different color flags so they stand out among other items. To add a flag to a message:

1. Right-click on the flag in the Flag For Follow Up column.
2. Select a flag color from the resulting shortcut menu. You now have a visual reminder to follow up on that email message without setting a reminder to appear.

**Shortcut:** To quickly flag a message in Outlook 2003, select the message in the Message list, and then press [Insert]. ■