Managing Schedules and Information with Microsoft Outlook

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Microsoft Outlook is powerful software that you can use to schedule meetings and appointments, store contact information, track progress on tasks, send and receive email, document phone calls and other conversations, manage files and folders and record notes. Outlook can be used as a personal information manager on a stand-alone computer or as a comprehensive workgroup collaboration tool on a Microsoft Exchange Server network. This handout describes quick steps for using the Calendar and creating and customizing Outlook Views in Outlook 2000 and Outlook 2002.

Using the Calendar

Adjusting Day/Week/Month View

1. Use the drop-down Current View list on the Advanced toolbar (View ➢ Toolbars ➢ Advanced) or choose View ➢ Current View to select Day/Week/Month.
2. Use the buttons on the Standard toolbar to choose whether to view 1, 5, 7 or 31 days at once.
3. If you're viewing 1, 5 or 7 days, you can select dates from the Date Navigator at the right (it looks like months of calendar dates). If you're viewing 31 days, scroll (on the right) to see different dates.
4. Select a date to view by clicking it in the Date Navigator. Drag to select multiple contiguous dates. Select multiple non-contiguous dates by holding down the CTRL key and clicking the dates you want to display.
5. To see more months in the Date Navigator while viewing days or weeks, drag the horizontal divider between the Date Navigator and the Task Pad below it.

Scheduling Appointments Without Using a Form

1. Switch to Day/Week/Month view and click the Date Navigator to open the day you want to schedule.
2. Click in the time slot that corresponds to the start time of the appointment you want to enter.
3. Type the name of the appointment, and then drag the bottom border of the appointment block down to its end time. The blue line next to the appointment marks that time as busy, and the alarm clock represents a reminder that you'll receive before the appointment.

Planning a Recurring Meeting

1. Open a new appointment form and enter information in the fields as usual or open an existing appointment by double-clicking it.

2. Click the Recurrence button on the form's Standard toolbar to set the recurrence pattern.
3. Choose Daily, Weekly, Monthly or Yearly from the options at the left.
4. Set the remaining recurrence options based on the original pattern you selected.
5. Click OK when you're done, then click Save and Close.

Scheduling a Multi-Day Event

1. Open the Appointment form for a new or existing appointment.
2. Click the All Day Event check box. The time fields will disappear.
3. Enter the dates for the Start Time and the End Time of the event.
4. Enter other information as appropriate for this event.
5. If you're unavailable for the day or days in question, change the Show Times As field to Busy or Out of the Office.

Planning a Meeting With Others According to Availability

1. Switch to Calendar and click the Plan a Meeting button on the Advanced toolbar.
2. Click Add Others and (in Outlook 2002, select Add From Address Book) and then select the people, rooms and equipment you would like to have attend, either as Required, Optional, or Resources. Click OK. Outlook goes out to the network and get the other attendee's schedules to display in the Meeting Planner. Calendars unavailable to Outlook are displayed by hash marks in the schedule window.
3. Enter a preferred Meeting Start Time and Meeting End Time for the meeting and click AutoPick to find the first available time for all attendees.
4. When you have decided on a time, click the Make Meeting button.
5. Enter the details about the meeting: Subject, Location, Reminders, and Categories. Enter additional information (like a list of items you'd like attendees to bring) in the open text box.
6. Click Send to send messages to all Attendees and Close to close the Plan a Meeting dialog box.
7. When messages are returned with responses, open the messages in the Inbox, then return to the original appointment to view the Status of the responses by clicking the Attendee Availability tab (in Outlook 2002, click the Tracking tab) on the open Appointment form.

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ENHANCEMENTS TO CALENDAR IN OUTLOOK 2002

- Color-coding and labeling of appointments help you organize appointments more easily
- Multiple reminders appear in a single window with a Dismiss All button
- Meeting attendees can send a “counter proposal” for an alternate meeting time
- Groups schedules let you view several schedules at the same time
- Microsoft Office Internet Free/Busy Service lets you post free/busy times to the Internet so others outside your organization can schedule meetings with you.

Creating and Customizing Outlook Views

To switch between views in any of the Outlook modules use the View list on the Advanced toolbar. Simply choose another view to apply the view. Or, change views by choosing View ➢ Current View from the Outlook menu. Views for the active module are displayed at the top of the submenu with the current view checked.

Adding Fields to a View

1. Choose View ➢ Current View ➢ Customize Current View
2. Click the Fields Button
3. The Show Fields dialog box opens, allowing you to select fields from the list on the left and/or remove fields from the list on the right. Select an item from the fields list on the right to activate the “Move Up” and “Move Down” buttons. Note the fields displayed are based on categorizes in a drop-down list at the bottom left of the dialog box. Change the drop down category to see other field choices.
4. Click OK twice to close both dialog boxes and see the changes you’ve made.
5. Changes are automatically saved. In other words, the current view is now a customized version.
6. If you wish to change the view back to its original settings, Choose View ➢ Current View ➢ Define Views, click the view you want to change back to its original settings and click Reset.
7. Close the dialog box or select another view and click Apply View.

Sorting a Table View

1. Sort a table view alphabetically by clicking on a column heading. Click once to sort alphabetically A-Z and click again to sort Z-A. Hold Shift and click another heading for a multi-level sort.
2. If you wish to sort other views or if you wish to define multilevel sorts, choose View ➢ Current View ➢ Customize Current View, and click the Sort button.
3. Choose up to four fields to sort by in ascending or descending order.
4. Clear the sorting order by clicking the Clear All Button.

Applying a Filter to the Data

1. Choose View ➢ Current View ➢ Customize Current View.
2. Click the Filter button.
3. Search for specific words (names, companies, etc.) by entering the search criteria in the Search For Word(s) field.
4. Change the In Field drop down to indicate which field you expect to find the word for which you are searching.
5. Click OK to apply the filter. Then click OK again to close the dialog box.
6. To apply more specific filters, click View ➢ Current View ➢ Customize Current View and then click the More Choices or Advanced tabs. More Choices lets you define specific categories on which to filter or identify items that you have not opened (like email or notes posted by another user). The Advanced tab lets you define more complex filters by applying conditions such as contains, between, doesn't contain, is empty, etc. to the filters. It also lets you apply more than one filter to the data.
7. Click OK twice when you're done. The status bar (bottom of the Outlook window, above the Start button) shows whether or not you're viewing filtered data. If the status bar isn't displayed, click the View Menu and choose Status Bar.

Grouping Data

1. You can only group table views. So select the appropriate module and select a table view.
2. Make sure the field you want to group by is visible. Add the field if necessary.
3. Click the Group By Box button on the Advanced toolbar.
4. Drag the header of the field you want to group by into the shaded box above the field names.
5. Drag additional field names if you want subgroups.
6. If you prefer, you can adjust grouping in the View Summary dialog box. (View ➢ Current View ➢ Customize Current View)
7. Click the Group By button in the View Summary dialog box to open the Group By dialog box. Choose the Group By and Then By fields.
8. When you group by a field, you don't need to show the field in the view as a column because the field's value appears in the group header above the items. To remove the Group By field from the view, disable the Show Field in View check box below the field.