Microsoft ®

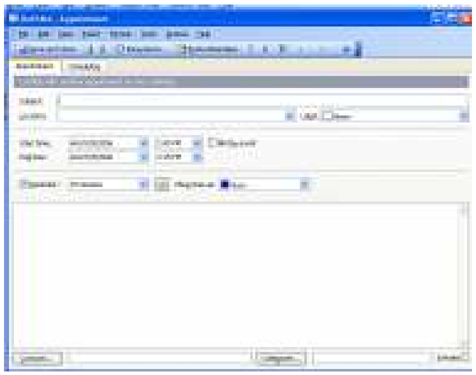
Organizing Your Day

TopTips© John Bullington

Shenendehowa Central Schools

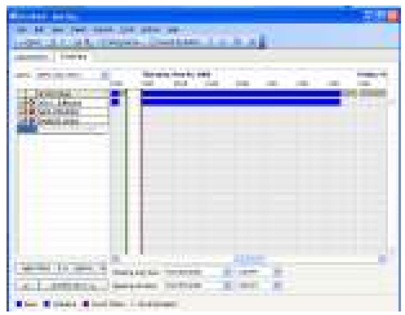
Calendar

Add an appointment – Click on **Calendar** in the **navigation** pane. Click **new** on the **toolbar**. Type the subject and location in the appropriate fields. Click the **Invite Attendees** button to invite other address book recipients to the meeting. They will receive an email with date and time and can then click *accept* to have it automatically scheduled onto their calendar.



Note the Private check box in corner. Select this if the appointment should not be reflected on your shared calendar as busy.

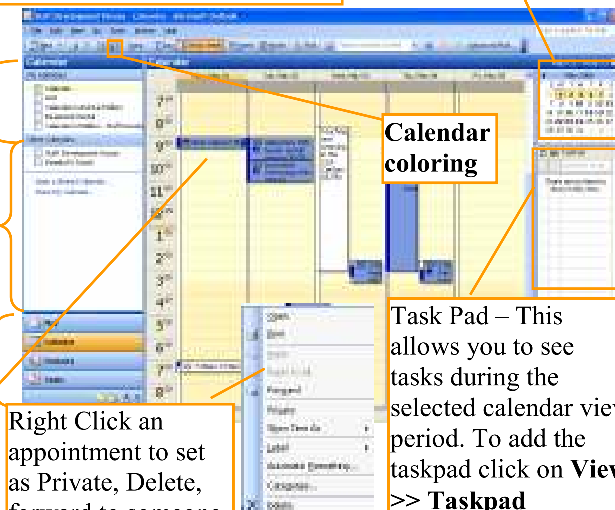
By inviting attendees, you can use the scheduling tab to find a time and date when everyone is available. When you select the scheduling tab you will see a graphic illustrating when each person is available and busy. (*note - you can't see what they are doing, only availability.)



Click **Next** to find a meeting time where all recipients are free. (This function doesn't work well unless all recipients are using their outlook calendar)

Calendar View – this switches the view of your calendar from day to week to month. Note when in week and month view, double clicking in the calendar will attempt to schedule an all day appointment. Double clicking in the calendar in day or work week view will attempt to schedule an appointment at that start time.

Current month – use arrow to go forward or backward by month.



My Calendars

Calendar coloring

Shared Calendars

Navigation Pane

Appointment – Double clicking an appointment will bring up it's properties, so changes can be made.

Right Click an appointment to set as Private, Delete, forward to someone, etc.

Task Pad – This allows you to see tasks during the selected calendar view period. To add the taskpad click on **View >> Taskpad**

Additional Calendars

Often users have a need for additional calendars.

To create new calendars, click on **Calendar** in the **navigation** pane, then **Right click** in the My Calendars section and choose **New Folder**. Type the name of the new calendar and click OK.

View Calendars

To view multiple calendars at the same time simply check the box for each calendar you'd like to view.

You must always have at least one calendar selected and it will always revert back to your main calendar view after exiting Outlook.

Copying appointments

To copy an appointment from one day to another, or from one calendar to another, hold down the **ctrl** key while clicking and dragging the appointment.

The appointment description will remain constant but the date and time may change depending on where you place it.

Add email as appointment

While in **Mail** view click and hold on the message you would like to add as an appointment, drag it down to calendar on your Navigation pane and let go. It will pull up an appointment with the email in the body.

Tasks can also be scheduled in this manner.

Color Coding your calendar

Click the color coding button on the toolbar in Calendar mode. Click edit labels. You may now change the default labels for your calendar. Note changes made in this manner only affect the currently selected calendar. If you have multiple calendars these choices are independent for each calendar. (Dragging a color coded appointment from one calendar to another will not change the label). Once you have selected a color coding scheme you may apply it to each appointment by pulling down the label selection box and selecting the appropriate colored label. Calendar color coding information is shared with all users who have access to that calendar.

Change time interval

Click on day view in calendar mode. Right click on the time bar next to appointments.
Choose from the time intervals at the bottom of the menu.

of days viewed

While in calendar mode click and drag across any number of days in the date navigator(small calendar in corner). Your calendar view will now change to show you that time period.

Printing your calendar

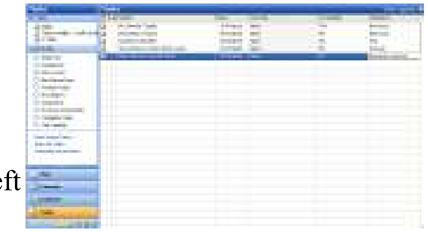
While in calendar mode click on **File** >> **Print**.

Select a print style (day, week, month, etc.) You can make changes to how content is printed to this calendar by selecting a style and clicking on **Define Style**.
You can print multiple months calendars by increasing the Print range. If you need to print blank calendar pages, create a new calendar and call it blank. Select the blank calendar before choosing **File** and **Print**.

Customizing Task View

Once you have added tasks to your task list and set deadlines, you should select the task pane view that best works for you. Click on the task tab in the bottom left to see a list of your tasks. Use the **View**>> **Arrange By** >> **Current View** pull down menu and select the view you want.
Simple (default) – Name, Due Date, Completed
Detailed – Simple plus Status, % complete and category.
Active task – This view only shows tasks that have not been completed.
Other – There are many specific views you can choose.

Tasks



Task are your "to do" list. They appear in multiple places (Outlook today, calendar and the task lists) depending on how you have Outlook configured. To add a task, click on the task tab in the lower left hand corner. On any of the blank lines in the task panel double click to add a task. You may select a subject, start and end times, percent completed, etc. To assign this task to a particular person(s) click on the assign task button and pick the appropriate contact(s).

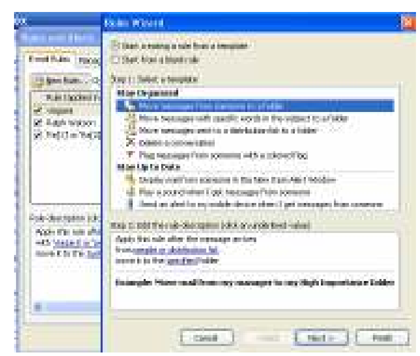
As a task is completed you can check off progress on that task. If the task was assigned to someone and they accepted it you will also see the progress updated periodically.

If you enabled task pad in calendar view it will show you only tasks that fit the time period you are viewing.

Rules

Pre-sorting mail into folders can greatly enhance your organization. To do this you need to create folders and rules. After creating a folder, click **Tools** >> **Rules and Alerts** >> **New Rule button**. A new dialog screen comes up where you will set the parameters of the rule.

Select start rule from template and highlight the first option which is move messages from someone to a folder, **click next**. Now you set the criteria that it will use to identify whose mail to move. In the bottom half of the screen **click on the purple link** that says "**people or distribution list**". Select the person from the appropriate address book, click next. Now **click on specified folder** and select the folder where these messages should go, click next. It will now ask you if there are any exceptions to this rule, most of the time you should click next. You may now select a name for the rule and choose whether to run it retroactively on your inbox. This rule will when checked move messages to the pre-specified folder as they enter your mailbox. **REMEMBER** you will have to check this folder for new mail regularly (A folder will have a blue number next to it which indicates number of unread messages.)



Journal

The Journal will allow you to track correspondence of all type with your personal contacts. Once a person is added to your contacts list you may right click that contact and choose add a new journal entry. In here you can document your contact time with that contact and even time your phone conversations with them. (click start timer and pause timer.)

To access the records saved as journal entries click the icon in the lower left hand corner, from that you may double click any contact for more details of that entry.

You may also use Journal to track correspondence through email/documents with a contact. To do this go to **Tools >> Options** >> **Journal Options** button. You may now select contacts from your personal contacts folder (not the Global address book) and check which types of correspondence you want outlook to track. This feature only works with individual contacts not lists