

USING OUTLOOK® AS YOUR PERSONAL INFORMATION MANAGER

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Front Range PC Users Group
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A DEFINITION

“Outlook is an information manager, which means that Outlook doesn’t just help you deal with your computer, it also helps you deal with people.”

Bill Dyszel, Microsoft Outlook 2000 for Windows for Dummies.

NY, NY: Hungry Minds, Inc., 1999.

ISBN 0-7645-0471-1

SELECTED FEATURES

- Email
- Address Book
- Appointments
- Tasks
- Journal
- Electronic Sticky Notes
- Mail Merge to Word

APPOINTMENTS

The screenshot shows the Microsoft Outlook Calendar interface. The window title is "Calendar - Microsoft Outlook". The menu bar includes "File", "Edit", "View", "Favorites", "Tools", "Actions", "Help", and "Adobe PDF". The toolbar contains icons for "New", "Go to Today", "Day", "Work Week", "Week", "Month", "Find", and "Organize". A dropdown menu is open, showing "Day/Week/Month" selected, which is circled in purple. The left sidebar shows "Outlook Shortcuts" with icons for "Outlook Today", "Inbox", "Calendar", "Contacts", "Tasks", "Notes", and "Deleted Items". The main calendar area displays a weekly view for April 2008. The days of the week are listed at the top: Monday, Tuesday, Wednesday, Thursday, Friday, and Sat/Sun. The dates range from March 31 to May 3. Appointments are listed in the cells: Tuesday, April 1 (7:00pm FRPCUG General Fo); Tuesday, April 8 (7:00pm Digital Imaging SIG); Wednesday, April 9 (7:00pm FRPCUG Board Meet); Thursday, April 15 (8:00am CSU Biotech mtg (C: 1:30pm Computer Training ()); Thursday, April 16 (7:00pm DTP SIG (FC Senior)); Friday, April 21 (1:30pm Computer Training ()); Friday, April 22 (1:30pm Computer Training ()); Friday, April 28 (1:30pm Computer Training ()); Saturday, April 27 (highlighted in blue). The taskbar at the bottom shows the Start button and several open applications: "Calendar - Micro...", "Inbox - Thunderbird", "Gmail: Email from G...", "Microsoft PowerPoi...", and "C:\FRPCUG\Presen...". The system tray shows the time as 11:57 AM.

Monday	Tuesday	Wednesday	Thursday	Friday	Sat/Sun
March 31	April 1 7:00pm FRPCUG General Fo	2	3	4	5
7	8 7:00pm Digital Imaging SIG	9 7:00pm FRPCUG Board Meet	10	11	12
14	15 8:00am CSU Biotech mtg (C: 1:30pm Computer Training (	16 7:00pm DTP SIG (FC Senior	17	18	19
21	22 1:30pm Computer Training (	23	24	25	26
28	29 1:30pm Computer Training (	30	May 1	2	3
					4

APPOINTMENTS—CONTINUED

The screenshot shows the Microsoft Outlook Calendar window. The menu bar includes File, Edit, View, Favorites, Tools, Actions, Help, and Adobe PDF. The view is set to 'Day/Week/Month View With AutoPreview', which is circled in purple. A callout box points to this menu with the text 'Day/Week/Month With AutoPreview'. The calendar displays a grid for Sunday, April 27, 2008, with a time scale from 8 am to 9:00 pm. The right sidebar shows a task list with items like 'SSN PW', 'Research digital cameras', and 'Complete Acrobat training'. The bottom taskbar shows the Start button and several open applications including Calendar - Micro..., Inbox - Thunderbird, Gmail: Email from G..., Microsoft PowerPoi..., and C:\FRPCUG\Presen... The system tray shows the time as 12:05 PM.

Calendar - Microsoft Outlook

File Edit View Favorites Tools Actions Help Adobe PDF

New Go to Today Day Work Week Weeks Month Find Organize

Day/Week/Month View With AutoPreview

Outlook Shortcuts Calendar

Outlook Today

Inbox

Calendar

Contacts

Tasks

Notes

Deleted Items

My Shortcuts

Other Shortcuts

0 Items

Calendar

Sunday, April 27

8 am

9:00

10:00

11:00

12 pm

1:00

2:00

3:00

4:00

5:00

6:00

7:00

8:00

9:00

April 27, 2008

April 2008

S	M	T	W	T	F	S
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
28	29	30				

May 2008

S	M	T	W	T	F	S
						1 2 3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
1	2	3	4	5	6	7

TaskPad

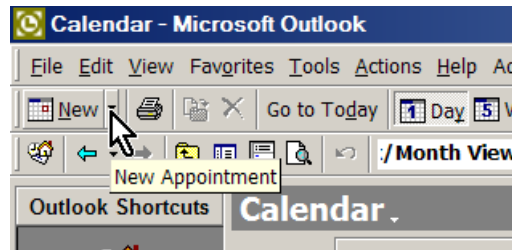
Click here to add a new Task

- SSN PW
- Research digital cameras
- Complete Acrobat training
- Complete InDesign training
- Complete FrameMaker Training
- Complete Photoshop training
- Create database of books
- Convert home movies on VHS to DVD
- Convert vinyl to CD's
- CBB Removal

Start Calendar - Micro... Inbox - Thunderbird Gmail: Email from G... Microsoft PowerPoi... C:\FRPCUG\Presen... 12:05 PM

APPOINTMENTS—CONTINUED

Save and Close after all data entry complete

A screenshot of the 'Appointment' dialog box in Microsoft Outlook. The dialog has a menu bar with 'File', 'View', 'Insert', 'Format', 'Tools', 'Actions', and 'Help'. It contains several fields and options: 'Subject:', 'Location:', 'Start time:' (Sun 4/27/2008, 8:00 AM), 'End time:' (Sun 4/27/2008, 8:30 AM), 'All day event' checkbox, 'Reminder:' (1 day), and 'Show time as:' (Busy). A large text area for 'Notes' is at the bottom. Callouts point to the time fields, the reminder field, and the notes area. A yellow warning bar at the top says 'This appointment occurs in the past.'

This appointment occurs in the past.

Subject:

Location:

This is an online meeting using Microsoft NetMeeting

Start time: Sun 4/27/2008 8:00 AM All day event

End time: Sun 4/27/2008 8:30 AM

Reminder: 1 day Show time as: Busy

Notes

Contacts... Categories... Private

Start/Stop times in 1/2 hr. increments, or enter data manually

Reminder in minutes, hrs., up to 2 days

Notes

APPOINTMENTS—CONTINUED

Appointment Recurrence [?] [X]

Appointment time
Start: 8:00 AM [v] End: 8:30 AM [v] Duration: 30 minutes [v]

Recurrence pattern

Daily Day 27 of every 1 month(s)
 Weekly The fourth [v] Sunday [v] of every 1 month(s)
 Monthly
 Yearly

Range of recurrence
Start: Sun 4/27/2008 [v] No end date
 End after: 10 occurrences
 End by: Tue 1/27/2009 [v]

OK Cancel Remove Recurrence

APPOINTMENTS—CONTINUED

Untitled - Appointment

File Edit View Insert Format Tools Actions Help

Save and Close Recurrence... Snagit Window

Appointment Attendee Availability

Show attendee availability

Show attendee status

All Attendees

Unknown

Type attendee name here

Invite Others... Options

Tentative Busy Out of Office No Information

Meeting start time: Sun 4/27/2008 8:00 AM

Meeting end time: Sun 4/27/2008 8:30 AM

Untitled - Appointment

File Edit View Insert Format Tools Actions Help

Save and Close Recurrence... Snagit Window

Appointment Attendee Availability

Show attendee availability

Show attendee status

Name	Attendance	Response
Unknown	Meeting Organizer	None
Click here to add attendees		

Invite Others...

MAIL MERGE TO WORD

Creating Labels from Contacts

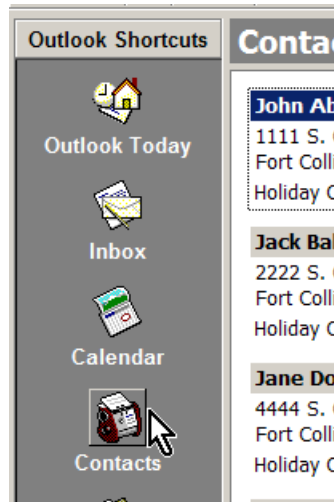
Overview

- Select “Contacts” from the Outlook Shortcuts
- Select “Mail Merge” from the “Tools” Menu Item
- Select Desired Choices from the Mail Merge Dialog Box
- Click OK

MAIL MERGE TO WORD

Creating Labels from Contacts

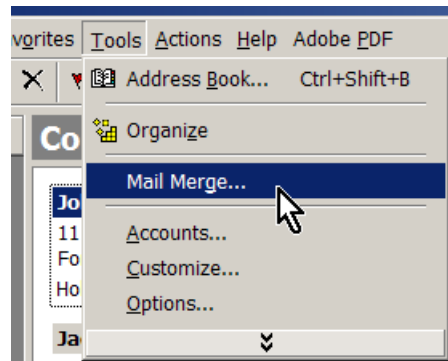
Select “Contacts” from the Outlook Shortcuts



MAIL MERGE TO WORD

Creating Labels from Contacts

Select “Mail Merge” from the Tools Menu



MAIL MERGE TO WORD

Creating Labels from Contacts

Select Desired Options from the Dialog Box

Can filter contacts within Outlook

Mail Merge Contacts

Contacts

All contacts in current view

Only selected contacts

Fields to merge

All contact fields

Contact fields in current view

To filter contacts or change the contact fields in the current view, go to the "View" menu and click "Customize Current View" on the "Current View" menu.

Document file

New document

Existing document: Browse...

Contact data file

To save this contact data for future use or reference, specify a file name.

Permanent file: Browse...

Merge options

Document type: Merge to:

Form Letters

Mailing Labels

Envelopes

Catalog

OK Cancel

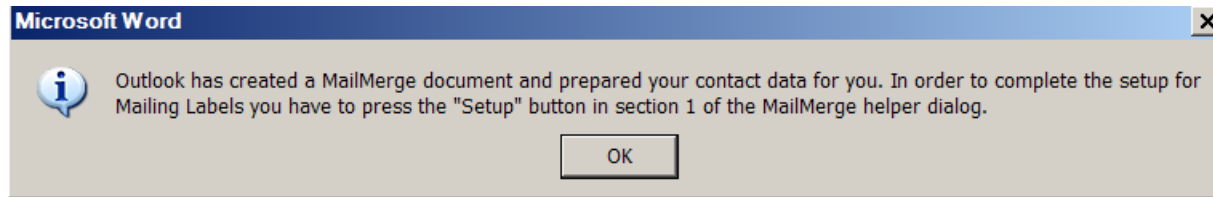
Can filter contact fields within Outlook

Select Document type (in this case, Mailing Labels)

MAIL MERGE TO WORD

Creating Labels from Contacts

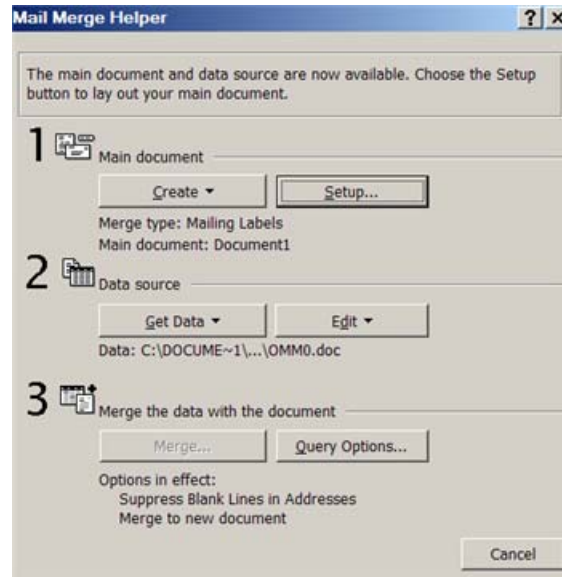
When you click OK, Microsoft Word opens and this message is displayed:



MAIL MERGE TO WORD

Creating Labels from Contacts

From this point on, it's all Microsoft Word. Click on OK and you get:



MAIL MERGE TO WORD

Creating Labels from Contacts

Click on “Setup” and you get:

Label Options [?] [X]

Printer information

Dot matrix

Laser and ink jet Tray: Default tray (Automatically Se... ▼

Label information

Label products: Avery standard ▼

Product number:

- 8166-18CB - File Folder ▲
- 8167 - Return Address
- 8196 - Diskette
- 8250 - Label
- 8253 - Label
- 8257 - Return Address
- 8366 - File Folder ▼

Label information

Type: File Folder

Height: 0.67"

Width: 3.44"

Page size: Letter (8 ½ x 11 in)

Details... New Label... Delete OK Cancel

MAIL MERGE TO WORD

Creating Labels from Contacts

Select the label type/size you want and click on OK:

Label Options [?] [X]

Printer information

Dot matrix

Laser and ink jet Tray: Default tray (Automatically Se... [v]

Label information

Label products: Avery standard [v]

Product number:

- 8166-18CB - File Folder
- 8167 - Return Address
- 8196 - Diskette
- 8250 - Label
- 8253 - Label
- 8257 - Return Address
- 8366 - File Folder**

Label information

Type: File Folder

Height: 0.67"

Width: 3.44"

Page size: Letter (8 1/2 x 11 in)

[Details...] [New Label...] [Delete] [OK] [Cancel]

MAIL MERGE TO WORD

Creating Labels from Contacts

Here is a suggested sequence to finish the process:

- Once the label type/size is selected, the “Mail Merge Helper” dialog box is displayed
- Close it
- From the Word “Tools” Menu item, select Mail Merge Wizard
- The Mail merge Wizard opens in the Word Task Pane at Step 3

MAIL MERGE TO WORD

Creating Labels from Contacts

Here is a suggested sequence to finish the process
(continued):

- Under “Select Recipients,” choose “Select from Outlook contacts”
- At this point, you can edit your list, if desired (“Edit recipient list”)
- From here follow the “Wizard’s” steps to complete the merge.

SUMMARY

- Outlook has lots of features, and is therefore a relatively expensive application (stand-alone versions—that is, not part of Microsoft Office—are advertised on the web from \$50 to \$130, depending on version). You need to decide what features are important to you before spending your money.
- Don't get carried away and enter a large quantity of appointments—especially if you attach reminders to each of them. Those reminders will become a significant annoyance.

SUMMARY

- If you also have Microsoft Word (any you most likely do if you have Outlook 2000 or later), the mail merge feature may be helpful—provided, of course, that you use the Outlook Contacts feature.
- When you use Outlook (or any PIM) instead of that \$5 appointment book (if they still exist) from the local office supply store, remember to **BACKUP BACKUP BACKUP** your data.

REFERENCES

Bill Dyszel, Microsoft Outlook 2000 for Windows for Dummies. NY, NY: Hungry Minds, Inc., 1999.
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Wikipedia:

http://en.wikipedia.org/wiki/Microsoft_Outlook