

Outlook 2003 in a Nutshell

Microsoft performed a usability study during the Outlook 2002 beta. This study determined that most Office users spend at least 60 percent of their time in Outlook, and much of that time working with e-mail. If you were to ask a cross-section of Outlook users how they use the program, it would be a safe bet that most of them would immediately mention e-mail. Some users would probably also talk about using Outlook to keep track of their calendar and maybe their contacts, but that would likely be about all most people would think about. Very few people actually use Outlook as effectively as they could, in part because they don't know how much Outlook can do for them.

You don't have to use all the features of Outlook any more than you have to eat every type of food you might find at a buffet dinner. On the other hand, you'll probably find that knowing all the different things that are available may stimulate your appetite, so you'll want to try some new things. So maybe that's the way you should approach this chapter — as a “sampler tray” that whets your appetite about what Outlook can do for you.

Easy Messaging

You would not be alone if all you thought about doing with Outlook was sending and receiving e-mail messages. Messaging is really at the heart of Outlook, even though only using Outlook for e-mail would be similar to visiting a family gathering and ignoring all the relatives because you were only interested in seeing your grandma's dog.

CHAPTER

In This Chapter

Increasing your productivity

Using messaging

Creating collaborative solutions

4 Part I ♦ Getting Started with Microsoft Outlook 2003

What is messaging?

In Outlook, messaging is synonymous with e-mail — electronic mail. E-mail has changed the way people communicate in a number of fundamental ways. Some of these changes include the following:

- ♦ Messages can be delivered almost instantly nearly anywhere in the world. Although this has been possible for voice messages sent over telephone lines for some time, e-mail encompasses additional types of messages such as document attachments. (It's also much cheaper than long-distance calls.)
- ♦ Sending an e-mail message is generally much less expensive than other methods. You can, for example, send the entire text of a 500-page book over the Internet without paying a special delivery charge. Compare that to the cost of sending a 500-page printed document via an overnight air express service!
- ♦ Time zones are far less important when you can send a message, and the recipient can read it at his or her convenience. As a result, it may be far easier to collaborate on a project with someone half-way around the world than it used to be to collaborate with someone two time zones away.
- ♦ It's almost as easy to send a photo or a fully formatted document as it is to send a plain text message because messages can easily include attachments. This makes it far more likely that the sender and the recipient both understand the message in the same way.

E-mail has truly made the world a bit easier to reach, and has brought about many changes in the way people communicate on a daily basis.

Integrating with forms

Outlook forms are a method of standardizing the way you send and receive information. You use Outlook forms when you create and store contact information and when you create a new message. Forms make interacting with your computer far easier because forms are a visual method of presenting information.

You aren't limited to the standard forms Outlook provides for its purposes. As detailed in the latter chapters of this book, you can create your own forms for use with Outlook. You might, for example, create a form that members of your workgroup could use to report on their progress or to report problems with a project.

Outlook forms can effectively connect any other computer in the world into your Outlook information database. If you e-mail a message that contains the proper form, the information the recipient enters into the form can be automatically e-mailed back to your computer and used on your system. If you need this type of integration, read all about forms later in this book.

You can also use templates, which are nothing more than Outlook items (messages, contacts, and so on) saved to disk, to simplify repetitive tasks. For example, you

might create a template to submit a monthly progress report or expense reimbursement report. You can use templates for non-messages items, as well. You might use a contact template to create multiple contacts with the same company information, for example. Or, you might use an appointment template to create appointments with the subject, label, and other properties already set. Whatever the case, you'll find more information about templates in Chapter 17.

Increased Productivity

Everyone has certainly heard the old saying, “time is money.” In today’s busy world, that old saying is probably even truer than ever. There just isn’t enough time for everything you need to accomplish—unless you can get some good help, that is. Outlook can provide lots of that help so you can be more productive and get more done in the time you have available.

Outlook has many different ways to help you increase your productivity, including providing a common collection of contacts to use for e-mail, phone calls, and letters, as well as the ability to easily locate information associated with specific projects or contacts. You aren’t likely to use all of them, but using even some of them can be effective. Figure 1-1 shows the Calendar folder with the Contacts folder opened in a second window.

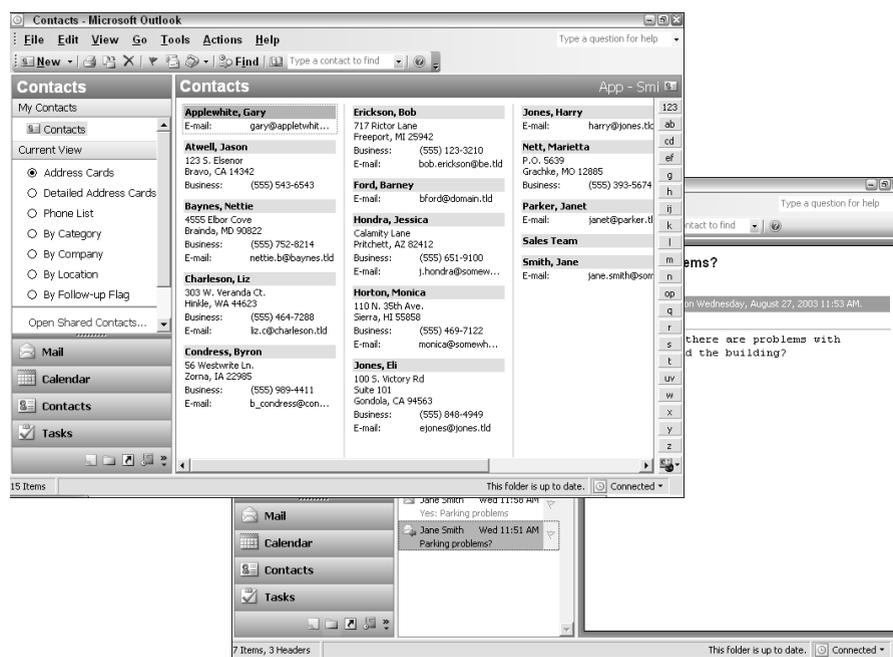


Figure 1-1: Use Outlook to help organize your life so you can be more productive.

6 Part I ♦ Getting Started with Microsoft Outlook 2003

Sharing information

Virtually no one works in actual isolation. Even if you were to go off to the top of a mountain to sit in a cave for the rest of your life, you'd still need to communicate with others once in a while—even if that meant creating a fire and sending out smoke signals. Fortunately for those of us with far more normal lives, Outlook is designed to make sharing information simple and straightforward. Outlook isn't likely to make your eyes water as much as smoke signals would, either!

Outlook offers several ways for you to share information. Here are a few possibilities for sharing information through Outlook:

- ♦ You can send information to other people in the form of e-mail messages. This is by far the simplest method, and will serve the needs of many users.
- ♦ You can use Outlook to schedule meetings—either online or face-to-face meetings—as the need arises. Meetings are an obvious method of sharing information, of course, but you may never have thought of using Outlook for this type of scheduling. To be effective, each of the meeting participants must keep his or her personal schedule in Outlook.
- ♦ You can publish information in public folders on an Exchange Server, which allows others to access the information. If you've been given the necessary permissions in a particular public folder, you can create additional folders and control the actions that others can take within the folder (create items, read them, and so on). Users across the Internet can also access the items in public folders if the folders are configured as publicly available newsgroups by the Exchange Server administrator. Figure 1-2 shows a public folder opened in Outlook.

**Tip**

An Exchange Server administrator can also set up newsfeeds to pull public newsgroup messages to public folders, where they can be read and replied to by Outlook users from within Outlook. For more information on working with newsgroups, see Chapter 16.

- ♦ Exchange Server users can grant other users various levels of access to their Outlook folders. For example, you might set up a shared Contacts folder to enable everyone in your Sales department to access customer addresses. Unfortunately, it isn't practical to share a set of personal folders, but it can be done. Chapter 18 explains how.

With only a few exceptions, e-mail messages being the most notable, you'll have a difficult time sharing most Outlook information with anyone who doesn't also use Outlook. The items on your Calendar, for example, aren't readily usable for scheduling unless everyone in your workgroup is using Outlook. Some types of information, such as your contacts, can be shared indirectly by exporting the information to another format.

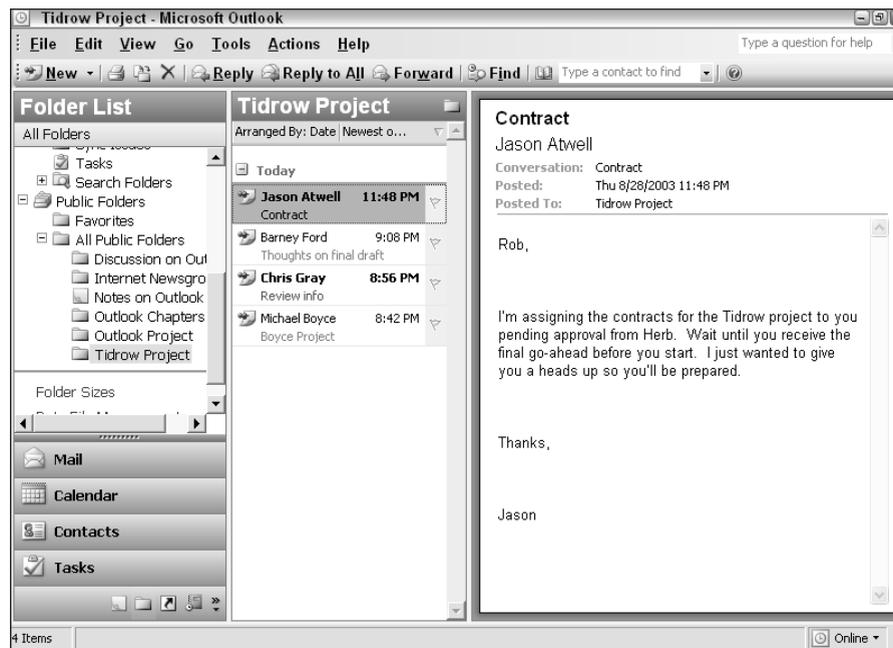


Figure 1-2: Use public folders to publish information for view and use by others.

Getting organized

People have different definitions of what it means to be organized. For some people, it's enough that they're able to get up and get to work on time. Other people take organization to the extreme and aren't happy unless each pair of socks in their underwear drawer is lined up according to a color chart. Outlook's organization features are intended for people who fit somewhere between these two extremes.

Several of Outlook's capabilities may help you get organized. Depending on your personal definition of what it means to be organized, you may find some or all of these capabilities useful.

Keeping track of your schedule

Figure 1-3 shows the Outlook feature that probably comes to mind first when you're thinking about organization. The Outlook Calendar enables you to plan your schedule, plan for meetings, and even block out times when you don't want to be disturbed.

The Outlook Calendar may look somewhat like the paper calendar that may already sit on your desk, but the Outlook Calendar can do things no paper calendar ever could. It's easy to forget to look on your desk calendar to see what might be scheduled for that week when you're planning a vacation, but the Outlook Calendar won't allow you to "accidentally" be gone when you have that dental appointment.

8 Part I ♦ Getting Started with Microsoft Outlook 2003

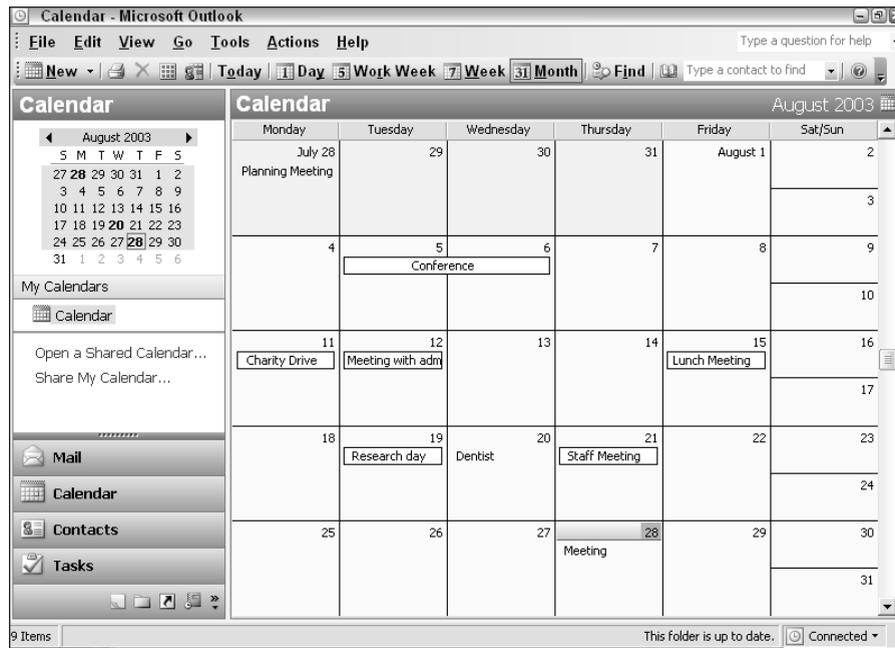


Figure 1-3: Use the Outlook Calendar to schedule your time effectively.

In addition to notifying you about scheduling conflicts, the Outlook Calendar can also provide both visible and audible reminders of important events. With a little planning, you could even have Outlook greet you on your special day by playing Happy Birthday when you check your schedule.

Staying in contact

If you've ever tried to rely on one of those little pocket organizer books to keep track of your address list, you'll quickly come to appreciate the Outlook Contacts list. Gone are the problems of running out of space simply because you know too many people with a last name such as Smith or of virtually illegible entries that are the result of making too many corrections.

The Outlook Contacts list can store far more than the obvious e-mail addresses. As Figure 1-4 shows, the Outlook Contacts list has room for additional information such as mailing addresses, phone numbers, business information, and quite a bit more. If you need to keep track of information about someone, the Outlook Contacts list can likely accommodate your needs.



Tip If you want to share contact information with people who may not be using Outlook, you might want to send the information as a vCard – an Internet standard for creating and sharing virtual business cards. (More on vCards in Chapter 9.)

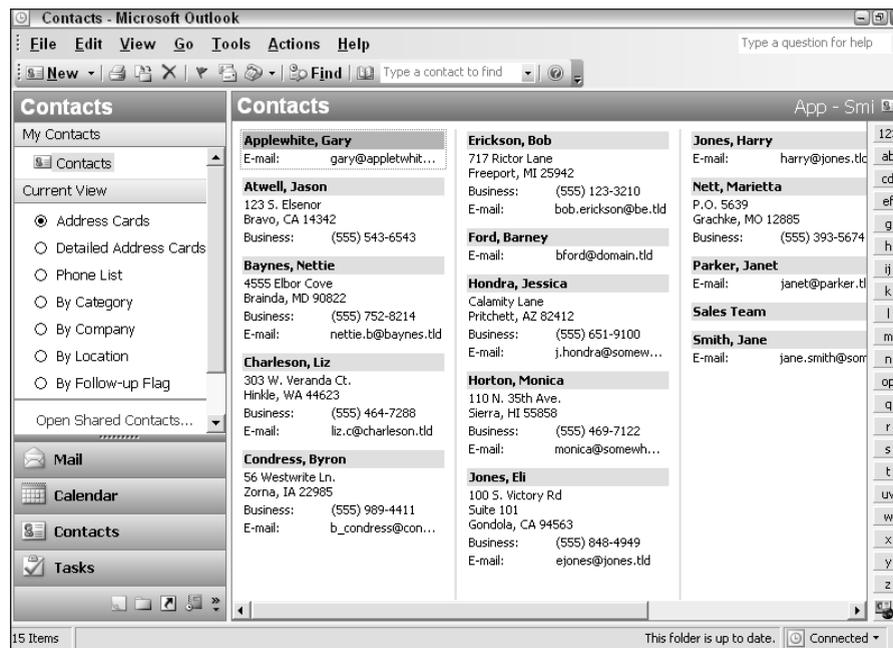


Figure 1-4: Use the Outlook Contacts list to organize your address list.

Getting even more organized with the Journal

Outlook doesn't stop at organizing your schedule and your address book. Outlook also keeps track of how you use your computer. You may not realize it, but each time you work on a Microsoft Office document, Outlook can make a note about the document in the Journal, a special Outlook folder. There is an automatic record of not only when you opened each document but also how long you worked on it.

As Figure 1-5 shows, the Outlook Journal automatically tracks information about e-mail messages in addition to Access, Excel, PowerPoint, and Word documents. You can add your own categories such as phone calls to the Journal, too.

Entries in the Outlook Journal are organized by date, so you can scroll to any particular date, click the plus sign (+) in front of the entry type, and see which items are recorded in the Journal for that date. If you want more details about an item, all you need to do is double-click the item to view the Journal entry.



Tip The Outlook Journal can be a valuable tool for tracking the time you spent working on a project—especially if you need to bill for projects based on time.

10 Part I ♦ Getting Started with Microsoft Outlook 2003



Figure 1-5: The Outlook Journal automatically keeps track of your Office documents.

Using the Tasks folder

The Tasks list, contained in the Tasks folder, is another important Outlook organizational tool. The Tasks list is useful for organizing those projects you need to complete but which don't fit neatly on a calendar. For example, Figure 1-6 shows a Tasks list that includes a number of items. Some items have a specific due date; others simply need to be done at some point in time. What sets all of these items apart from standard Calendar entries is that tasks are generally somewhat difficult to schedule. It's easy, for example, to schedule a business trip because your flight will leave at a specified time whether you're there or not. It's much harder to schedule something such as finishing a manuscript because it's difficult to foresee any problems that might delay the completion. In addition, the task of finishing a manuscript is one that you could finish early; there's no penalty for being ahead of schedule for most task-type items.



Tip Be sure to clean out old completed tasks from time to time so that it's easier to see what's left to be done. Select a completed task and click the Delete button to remove the task from the list.

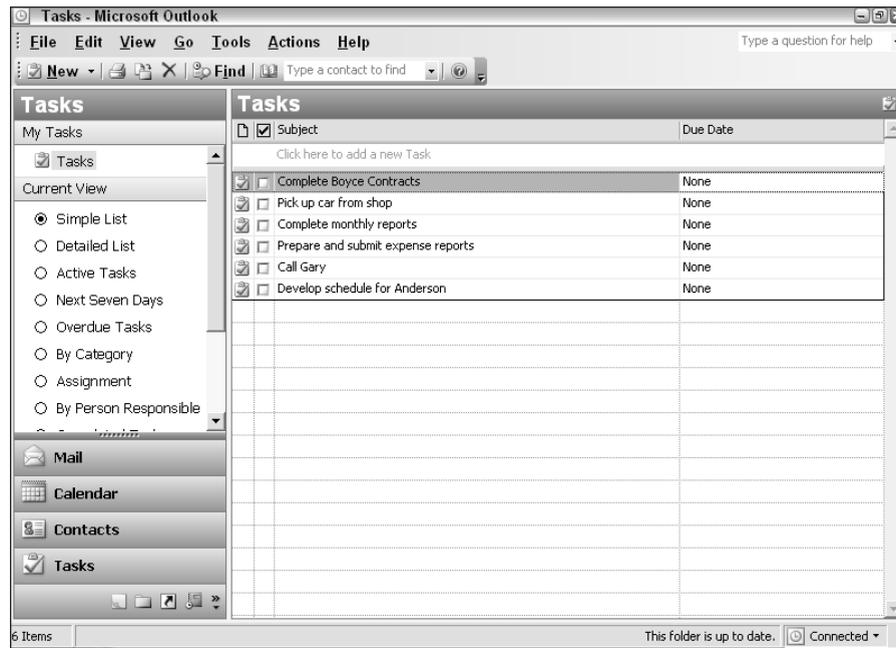


Figure 1-6: Use the Outlook Tasks list to plan items that don't easily fit a calendar-dictated schedule.

Integrating with other applications

Increasing your productivity using Outlook isn't limited to the various tasks you can perform within Outlook itself. Much of the information that you create or store in Outlook is also useful in other applications. You might, for example, want to create a form letter in Word and then use your Outlook Contacts list to address those letters. Sure, you could just create a second address book, but why do all that extra work when Outlook already has just what you need? Besides, do you really want to try to keep two different address lists up to date?

One productive way to integrate Outlook with other applications is a slight variation on the old form letter process. You've probably used mail merge to create form letters, but did you realize that you could use mail merge to create a series of e-mail messages, too? If you've ever considered changing to a different Internet service provider (ISP) but decided that notifying all your contacts about your new e-mail address was just too much of a hassle, why not use Outlook and Word together to create an e-mail notification of your new e-mail address? That way, each message recipient will receive his or her personalized copy of your address change and will be far less likely to ignore the message.

12 Part I ♦ Getting Started with Microsoft Outlook 2003

Even if you never use mail merge, you'll probably find that Outlook has a certain amount of integration with the other Microsoft Office applications. For example, although Outlook has a rudimentary text editor that you could use to create e-mail messages, it's likely that you'll never actually use this simple editor. It's far more probable that when you click the New Message button, Outlook will start Word rather than the simple text editor. Word gives you much more control over the format of messages in addition to providing easy access to features such as spell checking.

Collaboration

Many projects can be successfully completed only through the efforts of a number of different people all working together towards a common goal. A book such as this one is a good example. It covers a range of topics that are simply too broad for one author to complete in a reasonable amount of time. Only by having a team of authors and editors working in collaboration can a project of this size be completed within a reasonable amount of time.

Collaboration works only if all the members of a team are working together. Those team members may be spread thousands of miles apart, or they may be office mates, but coordination between team members is usually important. An editor can only begin work after an author has begun submitting pieces of the manuscript. If the authoring team decided to hold all their chapters until the last minute, the editorial team would be hard pressed to complete their work on time. Likewise, if people on a project team all decided to work independently without regard to anyone else's schedule, it would be extremely difficult to finish any project on deadline. Fortunately, Outlook offers solutions that can help solve these problems.

What is a collaborative solution?

A collaborative solution to a problem is only possible when team members agree to work together. A simple example of this is seen in a project planning meeting. It's difficult to hold a successful project planning meeting unless everyone agrees to attend the meeting at the scheduled time.

Even if you can get everyone to agree that they need to work together, it can still be a lot of work trying to coordinate everyone's schedule. Outlook can make this part of a project somewhat easier by helping you schedule meetings at times when everyone will be available. Figure 1-7 shows how you might use Outlook to begin this process.

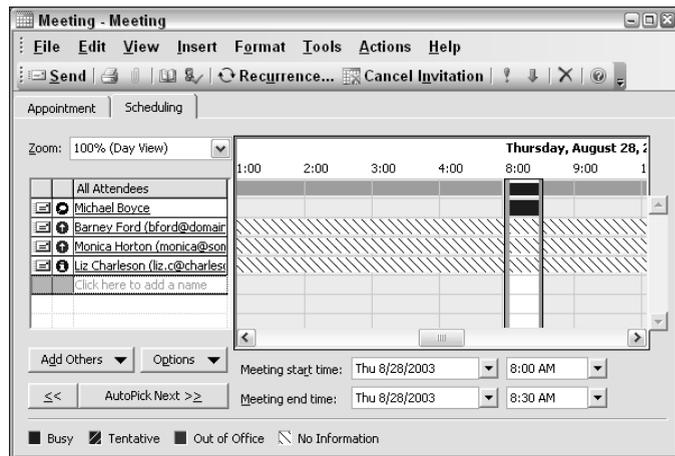


Figure 1-7: Use the Outlook meeting request to schedule a meeting that will fit into the team members' schedules.

As Figure 1-7 shows, you begin the process by setting up a meeting request. You can include as many details as necessary and determine where you'll hold your meeting. Online meetings require a bit of extra coordination to make certain that everyone uses the correct software and server location, which Outlook enables you to specify (see the example in Figure 1-7).

Tip

It's a good idea to plan a dry run before an important online meeting. Inevitably, at least one of the attendees will need to install and configure their online meeting software before they can connect, and this can easily disrupt your entire meeting if it has to be done at the last minute.

After you've used Outlook to request a meeting, it's time to finalize the schedule and attendance list. If all the people you've invited to the meeting are using Outlook, it's much easier to coordinate this event because you'll be able to check on their availability and even automatically log their responses to the meeting request. Figure 1-8 shows an example of an in-progress meeting request. One attendee has indicated he'll attend, and another has declined.

The advantage to scheduling meetings with other users in Outlook is that you can view at a glance their availability for the meeting and easily adjust the meeting date or time to accommodate everyone.

14 Part I ♦ Getting Started with Microsoft Outlook 2003

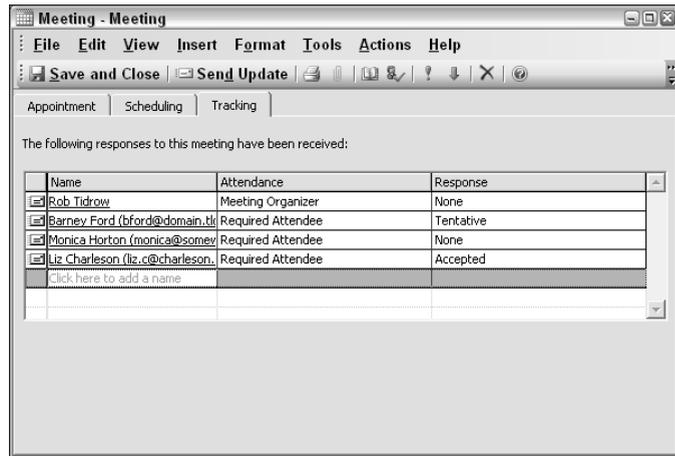


Figure 1-8: Check the responses to your meeting request using the Tracking tab.

Business solutions

Business, of course, is about more than just scheduling meetings. There are plenty of business solutions that don't involve meetings, but can use Outlook to help people work together. A common example might be to use public folders to keep everyone informed of important new developments or to share information about a new project.

Another less obvious example would be to use specialized forms to enable people to make standardized requests. Imagine that your company used special letterhead paper, but didn't want branch offices to maintain too large a supply because rapid growth was resulting in frequent changes. You might create an Outlook form that enables each branch to easily request letterhead paper on an as-needed basis so that they wouldn't be tempted to hoard too large a supply of possibly outdated materials.

The last half of this book concentrates on many different custom business solutions that use Outlook. You'll find more ideas there about what you can do to make Outlook an important part of your organization's collaborative efforts.

Outlook Development Capabilities

Unlike many of the other Microsoft Office applications, Outlook doesn't give you the ability to record a macro for playback; however, Outlook does offer extensive programming ability, both for macros and full-blown applications.

Developing for Outlook can be as simple as automating a common task through a macro or creating a custom form to obtain information from others, or as complex as creating a custom application that ties together Outlook and other applications to perform a specific function.

As the latter chapters of this book cover in detail, Outlook 2003 includes a Visual Basic editor (Figure 1-9) that you can use to create macros or more complex applications. The editor provides an integrated development environment that offers a code editor, form-layout tools, extensive Help documentation and samples, and several other features to make Outlook development a snap, even for beginners. The editor also provides a good selection of debugging features to help you troubleshoot problems with your programs.

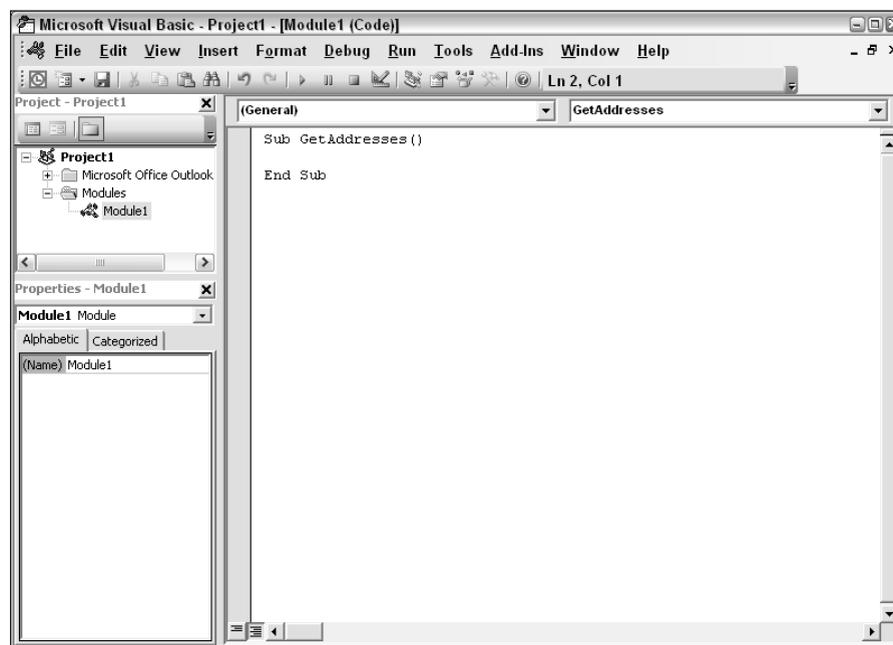


Figure 1-9: Use the Visual Basic editor to create Outlook macros and more complex custom programs.

16 Part I ♦ Getting Started with Microsoft Outlook 2003

The Forms editor (Figure 1-10) makes it easy to customize existing Outlook forms or create new ones. You don't need to be a rocket scientist to customize a form in Outlook. Even inexperienced users can do it, thanks to the tools provided in the Forms editor.

Although you'll find the Visual Basic editor a good solution for developing applications for Outlook and the other Office applications, you're not limited to it as your only development tool. You can use many other tools such as Microsoft's Visual Studio .NET to create custom programs that take advantage of and integrate with the Office application suite. You're also not limited to Visual Basic. Visual Studio, for example, offers several language choices including C++ and C#. Figure 1-11 shows the Visual Studio .NET development environment.

Whatever your development needs, you'll find that Office provides a relatively rich programming interface that enables you to take advantage of Office's capabilities without developing a lot of custom code. In fact, I suspect you'll discover that you can accomplish many programming and automation tasks with very little code.

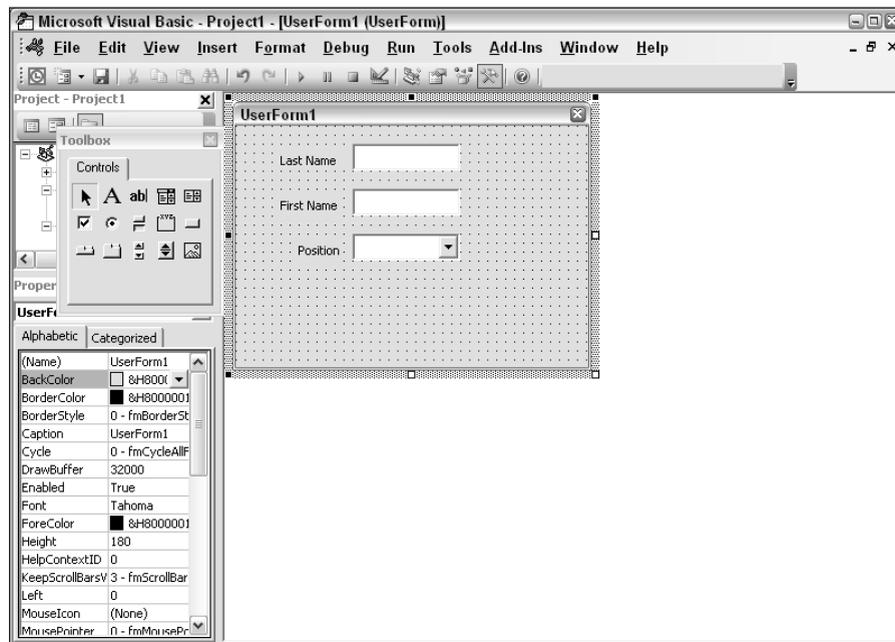


Figure 1-10: Modifying an existing form or creating a new one is simple when you work with a form in design mode.

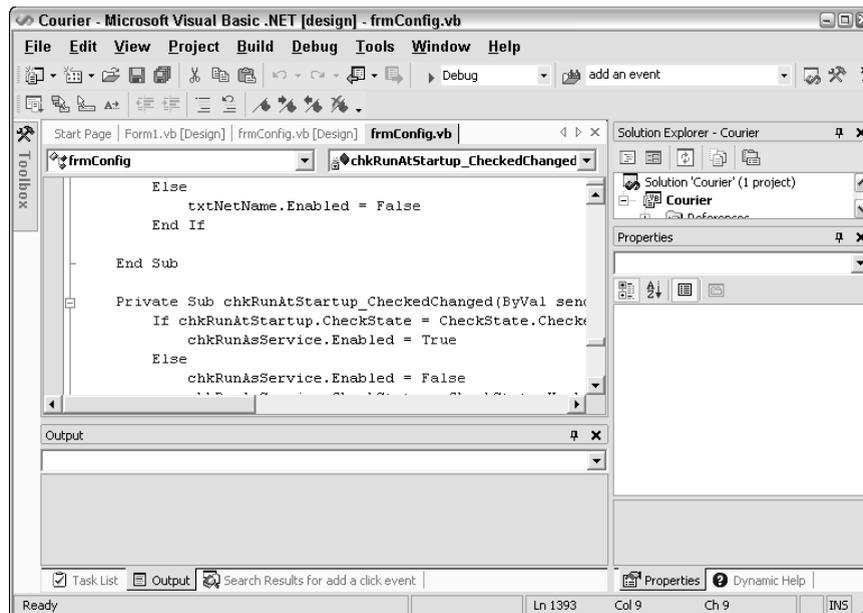


Figure 1-11: An alternative to the integrated Office Visual Basic editor is Visual Studio .NET, the latest development platform from Microsoft.

What's New in Outlook 2003?

Although Microsoft has initially downplayed this release of Office, there are some significant changes in the interface and in its feature set. This section focuses on the major features that are either changed or new in Outlook 2003.

Search folders

Search folders are virtual folders you create by specifying filter conditions, and these new folders are handy for organizing and displaying Outlook information. Outlook includes three search folders by default, and these three folders search all of the Inbox folders and subfolders and show the results in a single list:

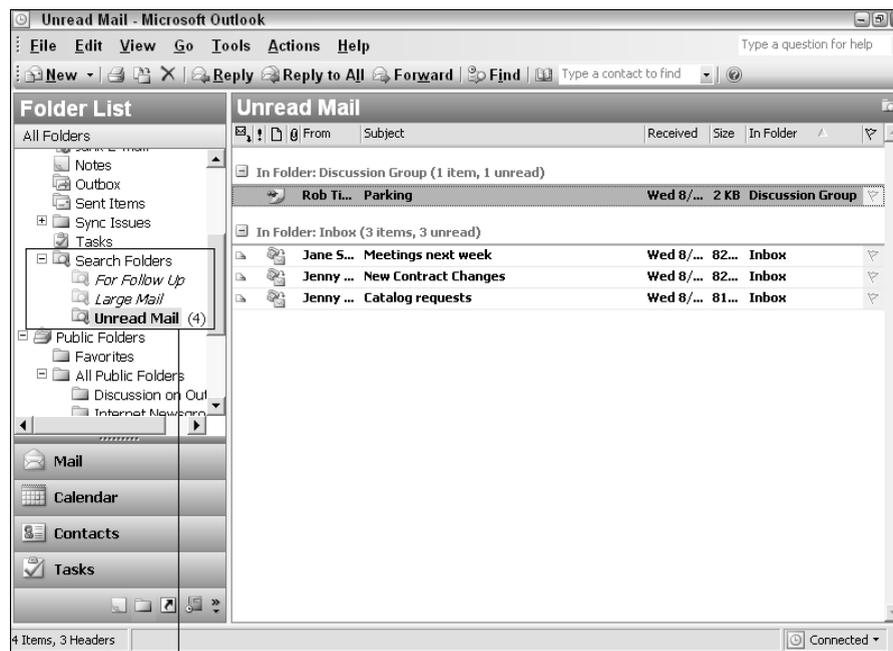
- ♦ **For Follow Up.** This search folder shows all messages that are flagged for follow up, which helps you quickly scan through the messages you've flagged for further action.

18

Part I ♦ Getting Started with Microsoft Outlook 2003

- ♦ **Large Mail.** This folder shows messages larger than 100KB, and it is handy when you need to trim the size of your mailbox or just need to locate a particular message that you know is relatively large. You can change the size criteria for this folder or create other ones with different criteria.
- ♦ **Unread Mail.** This folder shows all of your unread messages, and is a great help when you have lots of messages in your Inbox and want to view only those that are marked as unread.

You can easily create your own search folders to browse or organize your messages and other Outlook items in ways that make the most sense and offer the most benefit to the way you use Outlook. You can even include items from multiple Outlook folders in a search folder, which helps you consolidate data from different folders into a single view. Figure 1-12 shows the Unread Mail search folder.



Search Folders

Figure 1-12: Search folders are powerful tools for organizing and displaying Outlook items.

Navigation Pane

The Navigation Pane has experienced a major facelift, incorporating the features formerly found in the Navigation Pane with the folder list. Combining the folder list and the Navigation Pane simplifies the Outlook interface, and provides more room for displaying the Outlook folders and items. Figure 1-13 shows the Navigation pane at the left of the Outlook interface.

Reading Pane

The Reading Pane (Figure 1-14) has also seen a facelift that makes it more useable. It now has a paper-like appearance and can be located either at the right or bottom of the Outlook window. The changes enable the Reading Pane to show much more information, and Microsoft has added the ability for users to respond to meeting requests and use voting buttons in the Reading Pane without having to open the items.

Navigation pane

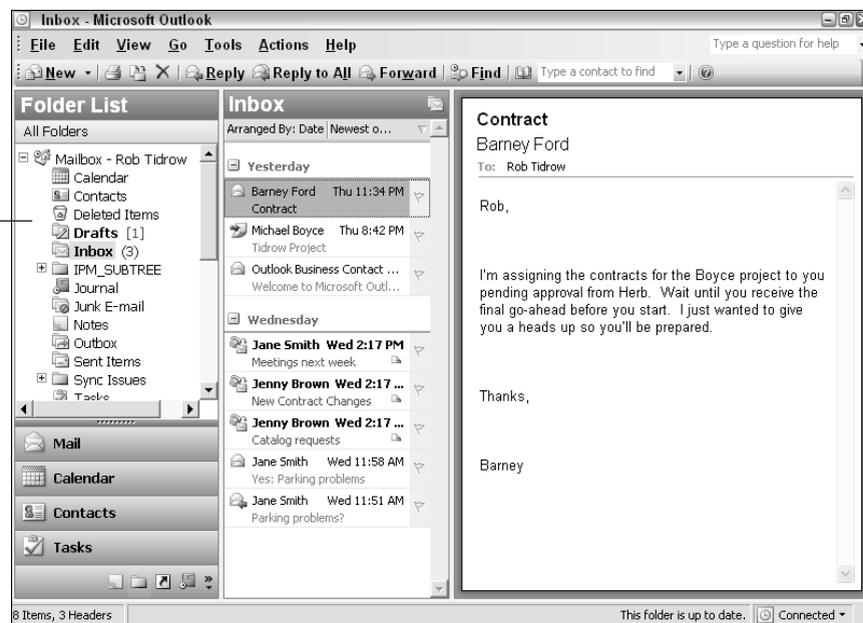


Figure 1-13: The new Navigation Pane combines the features of the old Navigation Pane and the folder list to simplify the Outlook interface.

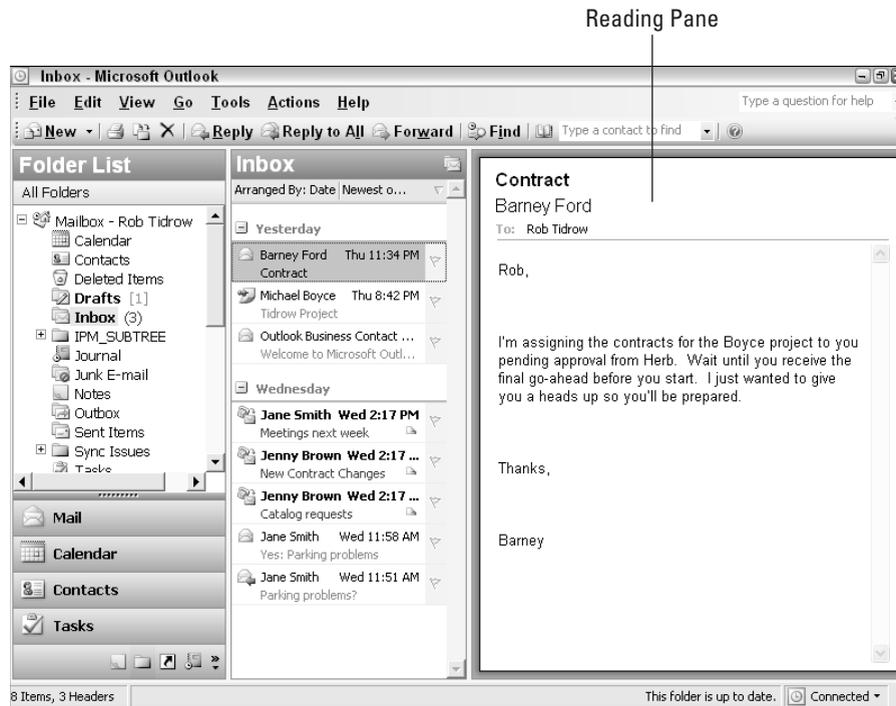


Figure 1-14: The Reading Pane offers more real estate for displaying messages and other items, and greater flexibility.

Quick flagging

Previous versions of Outlook allowed you to flag an item for follow-up, and added a red flag icon beside flagged items. Outlook 2003 gives you six flag colors to use to help you organize flagged items. You can also flag an item with just a couple of mouse clicks.

The flag color is stored as a unique property, so Outlook recognizes the different colors of flags. This means you can, for example, create a search folder that shows all red-flagged or blue-flagged items. These multiple flag types are therefore useful for sorting and organizing messages.

Block Web beacons (external content)

Spammers have become much craftier about separating the wheat from the chaff—good e-mail addresses from bad. One technique they use is to add links to external content in HTML-based messages so that when a user previews or reads the message, the external content is retrieved. The spammer can then gather the IP address of the client along with other information to help them determine which addresses are good. These loaded messages are called *Web beacons*. To help reduce spam and

block these Web beacons, Outlook by default blocks external content in HTML-based messages.

Signatures, encryption, and security

If you use e-mail signatures — text or other data added to each outgoing e-mail — you might find another new Outlook feature handy. Outlook now lets you specify separate signatures for each e-mail account. When you send a message from a specific account, Outlook uses the signature assigned to that account. This gives you flexibility in message signing.

Outlook 2003 also offers improvements in digital signature verification and simplified security use. You now have the ability to easily add a digital signature or encrypt a message even if you use Word as your e-mail editor. Chapter 7 offers detailed information about digital signatures and message encryption.

Network/Offline improvements

Outlook 2003 includes a new service mode called Cached Exchange Mode. Users with Exchange Server mailboxes can cache a copy of their Exchange Server mailbox on the local computer, which improves performance for offline use and slow/unavailable connections. Outlook 2003 also does a much better job of detecting and adjusting to connection changes, moving from online to offline status as needed and adjusting to network changes such as moving from a LAN to a dial-up connection.

Windows SharePoint Services and critical event notification

Office 11 includes several features that enable it to integrate well with Microsoft Windows SharePoint Services (WSS), a superset of FrontPage Server Extensions that facilitate collaboration. An WSS Web site is used by a group or team to provide and share information about a project, meeting, or other event. For example, a team might use an WSS site to coordinate a major meeting, posting the agenda and other supporting documents on the site for comment and review by all.

Outlook 2003 lets you use e-mail rules to generate alerts when items are added or modified on an WSS site. For example, you can receive a notification when the agenda is changed, meeting times are updated, or new documents are added to the site. These notifications can appear in an alert window, be routed to a special alerts folder, or even be forwarded to a mobile phone, pager, or other e-mail address.



WSS is a complex product that offers excellent collaboration capabilities for Office users. You'll find a detailed description of WSS and how to put it to work in Chapter 21.

You can take advantage of the critical event notification feature in Outlook 2003 even if you don't use WSS. For example, you can configure Outlook to display an alert when you receive new e-mail messages.

Calendar and Contact sharing and access

Outlook 2003 takes advantage of some new features to make it easier for users to work with multiple calendars. For example, maybe you use one calendar for your business events and meetings and a second for your personal items or for a special project. You can view these two calendars side by side, which is handy for planning and coordinating your schedule. This capability also makes it easier to work with another user's calendar in addition to your own when scheduling meetings and other events. WSS users can view other team members' calendars, as well.

Outlook 2003 also provides better offline access to calendar and contact information. It caches locally your Exchange Server contacts as well as WSS contacts so you can use them when you're offline.

Instant messaging

Instant messaging (IM) now pervades Outlook and other Office applications. You can start an IM session easily any time you see a contact displayed in the application. For example, you can click on a sender's address in an e-mail to start a chat session. This feature is available in Outlook 2002, but has been expanded in Outlook 2003.

Other changes

Outlook 2003 offers many other changes in addition to the ones I've already mentioned. For example, you now have better control over views and more options for organizing various types of Outlook items. We'll cover all of these new features throughout the rest of the book.

Summary

This chapter provided a quick sampling of some of the tasks you can accomplish with Outlook. You probably weren't aware just how versatile and adaptable Outlook could be, especially if you thought Outlook was only another e-mail program. But because this chapter is just a quick sampler, we hope you'll read on and learn much more about this powerful application called Outlook.

The next chapter provides a guided tour of Outlook, where you learn some of the basics of using Outlook for yourself.

