Chapter 10

Manage Your Time, Tasks, and E-Mail with Office Outlook 2007

What you’ll find in this chapter:

- A look at Office Outlook 2007
- Manage time and organize tasks
- Share and compare calendars
- Take control of your Inbox

Many of us wish there were more hours in the day. We go into work in the morning with good intentions—determined to get caught up—but somehow when we leave at night we have the same number of items (or more!) on our To Do lists. We are inundated every day with a mountain of e-mail messages; tasks to identify, assign, and act on; meetings to schedule and attend; and calls to make and respond to. The new features in Microsoft® Office Outlook® 2007 can help you make the most of the time you have and even take you a few steps closer to being caught up. By using the task management, e-mail filtering, and calendar sharing capabilities in the 2007 release, you’ll be spending more time on the tasks that really matter and less time on distracting details such as sorting through unwanted e-mail, searching for lost messages, and struggling to find meeting times for your group.

A Look at Office Outlook 2007

Office Outlook 2007 doesn’t share the same new user interface that Microsoft® Office Word 2007, Microsoft® Office Excel® 2007, Microsoft® Office PowerPoint® 2007, and Microsoft® Office Access 2007 all share. The new Office Outlook 2007 at first glance looks similar to Office Outlook 2003: the menus are familiar (File, Edit, View, Go, Tools, Actions, and Help), and the navigation pane on the left looks the same (see Figure 10-1). But a closer look will show you a number of new features—specifically, you’ll notice the Search box at the top of the Inbox column, the RSS Feeds folder in the Mail Folders navigation pane, and the new To-Do Bar along the right side of the window. Each of these items will be more fully discussed in the appropriate sections later in this chapter.
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Changing the Office Outlook 2007 Window

You can now “collapse” the navigation pane in Office Outlook 2007 when you want to give yourself more room to work on-screen. Your favorite folders and the icons for the primary views—Mail, Calendar, Contacts, and Tasks—are available in the collapsed bar so that you can continue to select those views as needed.

To collapse the navigation pane, click the left arrows at the top of the pane. The navigation pane is minimized to a vertical bar, stretching alongside the left edge of the Office Outlook 2007 window (see Figure 10-2). When you want to return the navigation pane to its original display, click the right arrows at the top of the bar.

Manage Time and Organize Tasks

One time-consuming aspect of managing schedules and information is switching among different capabilities within Office Outlook 2007 to keep things organized. Office Outlook 2007 greatly simplifies managing your to-do lists and keeping an eye on upcoming appointments with the new To-Do Bar, which brings all those items together in one place, displaying

![Figure 10-1 Changes in Office Outlook 2007.](image-url)
them along the right side of the Office Outlook 2007 window. As with the navigation pane, you can minimize the To-Do Bar to get more room onscreen for your e-mail list and reading pane. Figure 10-3 introduces the various elements in the To-Do Bar.

**Figure 10-2** The Office Outlook 2007 navigation pane minimized.

**Figure 10-3** The To-Do Bar is a command center for your tasks and appointments.
The To-Do Bar is visible in all Outlook modules, so you have access to the information whether you’re working in the Calendar, Tasks, Mail, or one of the other modules. And the To-Do Bar integrates more than just the tasks you create in Office Outlook 2007: your Microsoft® Office OneNote® 2007, Microsoft® Office Project 2007, and Microsoft® Office SharePoint® Server 2007 tasks can also appear in To-Do Bar, so you can see easily at a glance what you need to accomplish today.

An item is added to the To-Do Bar automatically whenever you flag an e-mail message or contact, or when you drag a message to the To-Do Bar. When you flag an e-mail message in your Inbox, an entry is added to the Today category in your To-Do Bar; when you drag an item to the To-Do Bar, it is placed in the category (Later, Next Month, Next Week, or Today) where you place it.

**Tip** You can change the look of the To-Do Bar by clicking anywhere in the title and choosing Customize. Select Customize to display the To-Do Bar Options dialog box. You can change the settings that control how many months and appointments are displayed in the To-Do Bar (or hide the items altogether). Enter your choices and click OK to save your changes; the To-Do Bar display then changes to reflect your choices.

**Adding Tasks to Your Calendar**

Here’s another timesaving and organizing feature in Office Outlook 2007: Now you can actually schedule time to work on tasks by simply dragging them to the Calendar. Previously, tasks and the Calendar worked somewhat separately—to keep track of the same event or project in both views, you had to create entries for each, duplicating the effort you spent in organizing one task. Because the Daily Task List displays your tasks in the To-Do Bar according to the day on which they are due, they are already organized so that you can easily drag them to your Calendar to block off time to complete them. Using the Daily Task List, you can also modify the date of tasks by dragging them from one day to another, and the To-Do Bar will update accordingly.

**Note** In real life, we often don't get to everything on our list during the day. Interruptions and changes in priorities often cause us to leave for tomorrow what we meant to do today. When this happens with a task you created in Office Outlook 2007, the task is carried over to the next day automatically, without any action from you. The task will remain active on your To-Do Bar (and in your Task list and Calendar) until you mark it as completed.
Colorizing Tasks, Appointments, Messages, and Contacts

You can apply a color category to any item you create in Office Outlook 2007 so that it stands out visually no matter which view you are using. For example, if you want an appointment you just created to be easy to spot on your Calendar, you can assign a color to it using the Categorize control in the user interface. When the Appointment window is open, click the Categorize button and choose the color you want from the displayed list (see Figure 10-5).
Color Categories in Office Outlook 2007 help you unify the way you organize and search for information. Because the categories are shared among mail, contacts, tasks, and the calendar, you have an easy way to visually distinguish all types of data relating to one project or one purpose. For example, if you're working on a business report, all mail meetings, tasks, and contacts you're working with to create the content for the report might be categories in a green color. You can then arrange and search all your information by this Color Category to gather the relevant information you need, which ultimately saves you time.

The easiest way to assign a color category is to click the Categories column in the list box in your current view. Both the Inbox and the Task List have Categories columns to the left of the flag column (see Figure 10-6). When you're working with the Calendar, as you see in Figure 10-7, the Categories column appears beneath the Calendar area (more about this in the next section). In Contacts view, the Categories column is included as part of the Contacts list (see Figure 10-8).

![Figure 10-6] Click the Categories column in the Task List to colorize a task.

![Figure 10-7] The Categories column in Calendar view appears below the appointment area.
Figure 10-8 You can assign color categories to Contacts to help you recognize people by role, company, or relationship.

Note In your Contacts list, the Categories column will appear several columns to the right—in this illustration, the Categories column was moved to the left so it would be visible in the example.

If you want to change the color of the selected category, you can do it quickly by right-clicking the item in list view or in the To-Do Bar. Whether the item is a task, appointment, message, or contact, simply right-click and choose Categorize; then choose the category you want to assign to the item (see Figure 10-9).

Figure 10-9 Change the color category by right-clicking the item.

Tip If you tend to use one category regularly, you can set up a Quick Click feature that enables you to make one category the default assigned whenever you click an item. Right-click the item and choose Categorize; then select Set Quick Click. Choose the color you want to use as the Quick Click category and click OK to save your settings.
Share and Compare Calendars

When you work with a team of busy people, finding a time when everyone can meet can be difficult. Using meeting invitations to contact team members by e-mail is helpful, but you still wind up coordinating all the times yourself. Office Outlook 2007 includes several new features that help take the busywork out of scheduling meetings:

- You can send a calendar snapshot to a coworker as part of an e-mail message.
- You can publish your calendar online using Microsoft® Office Online Hosting Services.
- You can use calendar overlay view to layer calendars easily spot open times.

Sending a Calendar via E-Mail

When you click Send A Calendar Via E-Mail in the Calendar navigation pane, Office Outlook 2007 allows you to send an HTML representation of your calendar information. This helps ensure that you can communicate your daily availability to anyone, regardless of whether they are a client working outside your company or just a friend. When you click this link, Office Outlook 2007 automatically opens a new message window and displays the Send A Calendar Via E-Mail dialog box (see Figure 10-10). Here you choose the Date Range (you can choose anywhere from the current day to the next 30 days—to your whole calendar!) and determine how much Detail you want to show (you can show only the times you are available; include limited details such as availability and the subject lines of calendar entries, or full details of all entries). Additionally, you can click the Show button in the Advanced area to choose whether to include information marked private and include any attachments for calendar entries.

Figure 10-10 You can choose how much information you want to show when you send a calendar by e-mail to other team members.
In the Send A Calendar Via E-Mail dialog box, you can also choose the E-Mail Layout of the message you send, providing either a list of events or your daily schedule. Figure 10-11 shows an example of a message sharing a daily calendar.

Three Things to Try
Jim Boyce, author of Microsoft Office Outlook 2007 Inside Out and Microsoft Office Outlook 2007 Plain & Simple, says these are his favorite new features in Office Outlook 2007:

1. Attachment Preview enables you to preview the contents of attachments without opening them.
2. Instant Search helps you quickly and easily find messages, tasks, and other items almost instantly.
3. You can subscribe to, read, and manage Really Simple Syndication (RSS) feeds right in Office Outlook 2007.

Figure 10-11  You can easily send your calendar to others by e-mail.

Publishing Your Calendar Online
If you’re struggling to share long-term calendars with partners, friends, or family, you can use the new free publishing capabilities to communicate calendar information with others. For example, if you’re organizing an event and want all participants to view a calendar of the
activities and get the latest updates, you can create that calendar in Office Outlook 2007 and publish it to Office Online. After you invite others to see your calendar, they can view it on a Web browser or download it onto their machine and view it using Office Outlook 2007 or any other calendar tool that supports files with the .ics extension. Any updates you make to the calendar will be automatically updated on the Web version and then also synchronized with any locally stored copies.

Use the Publish My Calendar link in the Calendar navigation bar to start the process. In the Publish Calendar To Microsoft Office Online dialog box (see Figure 10-12), you specify the following items:

- Choose the time span for the calendar you want to display.
- Select the level of detail to show (Availability only, Limited details, or Full details).
- Set permissions to determine who has access to your calendar.
- Choose whether the calendar will be uploaded only once or automatically as updated.

![Figure 10-12 Publishing your calendar online makes it easy for those with access to view your schedule.](image)

After you publish the calendar online, you are given the option of sharing it with others. After you enter the e-mail addresses of others you want to receive your calendar information, the Web address of your calendar is sent, along with instructions on how others can access it.
Tip Office Online includes a number of specialty Internet calendars you can download. Click Browse Calendars Online to look for calendar templates. Scroll down to the Subscribe To A Free Internet Calendar area and click the link of a calendar you want to try. A prompt will ask your permission to proceed; click Yes, and the calendar is added to your Office Outlook 2007 Calendar view.

Displaying and Comparing Calendars

Office Outlook 2007 makes it easier to view others’ calendars so you can easily identify opportunities for meetings and activities. The calendars available for you to view are displayed in the Calendars navigation pane. You can display or hide the available calendars by clicking the check box to the left of the calendar name. By default, when you display more than one calendar, the calendars are shown in Side-by-Side Mode (see Figure 10-13).

![Figure 10-13 You can display multiple calendars in Side-by-Side Mode.](image)

You can now layer calendars one on top of another using Overlay Mode to find open time slots easily by selecting the calendars and then clicking the green arrow on the calendar on the right. You can tell which appointments belong to which calendar by the coloring; the appointments from the underlying calendar appear in the same color as the underlying calendar’s title bar (see Figure 10-14).
Figure 10-14 Overlay Mode lets you layer calendars to find available times.

Take Control of Your Inbox

As you can see, Office Outlook 2007 is about a lot more than e-mail, but e-mail takes up a large chunk of our time during the day. Office Outlook 2007 includes a number of new features that can save you a huge amount of time and effort—from setup techniques to content delivery to search options and junk e-mail filters, Office Outlook 2007 works faster and smarter to help you free up time you can spend getting more done.

Automatic Attachment Previews

Now instead of double-clicking an attachment and waiting for it to open in another application, you can preview attachments to your e-mail messages with a single click. This is a great timesaver and enables you to decide quickly which attachments you need to spend more time with and which ones you can file, respond to, or delete right away. To preview an attachment, click the attachment, and the file displays in the body of the e-mail message.

Note Depending on whether the sender is on your Safe Senders list, you might see a message before the preview appears, warning you of a potential security risk. Click Preview File to continue the process.

Find What You Need Faster

The same indexing technology used in Windows Desktop Search and Windows Vista is used in Office Outlook 2007, giving you the fastest access possible to your information in all views (Mail, Calendar, Contacts, and Tasks). You will notice a dramatic decrease in the time it takes to display search results—now you can find what you need almost as fast as you can type.
A new search box is displayed at the top of the Inbox column and at the top of the Tasks List. Click in the search box and the display will change color, indicating that it is selected. You can simply type the word or phrase you want to find (see Figure 10-15). Even before you finish typing, results display messages (or tasks) that contain the word or phrase you're searching for.

**Figure 10-15** The faster search process locates messages or tasks that contain the text you type into the Search box almost instantly.

You can add search criteria to find specific items faster. Click the Add Criteria button to choose the criteria you want to add to your search (see Figure 10-16). You can also easily repeat searches you've done previously by clicking the Show Instant Search Pane button to the right of the search box; then point to Recent Searches and select the search you want to use (see Figure 10-17, on the next page). Additionally, you can change the defaults set up for the search process by choosing Search Options in the Instant Search Pane menu.

**Figure 10-16** You can search faster and farther by adding search criteria.
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The Instant Search Pane has tools for repeating searches and setting search options.

Figure 10-17 The Instant Search Pane has tools for repeating searches and setting search options.

**Turning E-Mail into Action Items Instantly**

Part of the challenge of working with e-mail effectively is dividing the messages we need to act on right away from the messages we can respond to later. In Office Outlook 2007, you can use the enhanced flagging feature to identify an important message as one you need to act on immediately. When you add the flag, the item is automatically added to the To-Do Bar.

**Flagging Action Items for Others**

You can also use the enhanced flagging feature to flag messages you send and receive. If you have just finished the draft of a new employee handbook, for example, you might send it in an e-mail to others working on the project, requesting their feedback by the end of the week. You want them to respond by a specific date, so you flag the message for follow-up. Because the message is flagged, when it arrives in their Inboxes, the message is added to their To-Do Bars as a task with a specific response date (see Figure 10-18).

Figure 10-18 Improved flagging features enable you to send an e-mail message that creates an action item for others.
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Easy E-Mail Setup

Setting up an e-mail account is now much easier in Office Outlook 2007. A new automated account setup feature simply asks for your e-mail account name and password, and then does the rest (see Figure 10-19). The wizard finds the server settings, automatically sets up the account, and then displays an updated E-Mail Accounts dialog box with the new account and the location for the account’s PST file. There’s nothing more to do except check your e-mail! The new mail folder is displayed in your Personal Folders list in the Mail navigation pane.

Tip Office Outlook 2007 can now retrieve your Web-based e-mail and download it to your Inbox, enabling you to compile mail from different accounts.

Creating and Sharing Electronic Business Cards

A fun and functional new feature in Office Outlook 2007 enables you to create, save, and share your contact information with others as an Electronic Business Card. In the New Contact window, click Business Card in the Write tab to customize the default card that is created for a new contact. You can add photos and other special design elements.

You can easily send electronic business cards to others via e-mail or attach your business card to your outgoing messages. Simply choose Options from the Tools menu and click the Mail Format tab in the Options dialog box. Click Signatures to display the Signatures and Stationery dialog box; then click Business Card in the Edit Signature area to display the Insert Business Card dialog box so that you can select the card you want to attach to your messages.
Receive RSS Feeds in Office Outlook 2007

Since Office Outlook 2003 was introduced, RSS has become a widely popular method of receiving content from the Web. With so many interesting—and necessary—Web pages to browse, we can spend hours online searching the sites we have come to rely on for dependable or interesting content. If those sites have RSS feeds available (meaning the information in published and distributed by the content publisher via RSS technology), you can receive those feeds directly in your Office Outlook 2007 Inbox, significantly reducing the time you once spent browsing—and giving you access to that great content whenever you want it.

To use the RSS feature in Office Outlook 2007, double-click the RSS Feeds folder in your Personal Folders in the Mail navigation pane. A window appears, describing the basis of RSS and telling you how to get started (see Figure 10-20).

![Image of Office Outlook 2007 RSS Feeds feature](image)

**Figure 10-20** You can have RSS content delivered directly to your Inbox.

**Note** When you use Microsoft Internet Explorer 7.0, your RSS feeds are synchronized both on the Web and in Office Outlook 2007 so that you have various ways to read and use the content you’re most interested in.

Improved Junk E-Mail Filters

Office Outlook 2007 includes an enhanced Junk E-Mail Filter that catches incoming messages that could be junk mail—or its more dangerous counterpart, a phishing message—and then
intercepts and eliminates it for you. The Junk E-Mail Filter scans incoming messages to determine their content and structure, and even tracks messages that look suspicious and disables any links that might lead you to a potentially dangerous site. When a message arrives that Office Outlook 2007 suspects might be a phishing message, a notification alerts you, and images and links in the message are disabled until you approve them.

**On the Watch for Phishing**

Phishing is a potentially dangerous form of junk e-mail that involves an unscrupulous sender who distributes an e-mail message that masquerades as a message from an organization you know and trust—perhaps your bank, a popular site that you visit often, or your mortgage company. The people sending these phishing messages often use the same logo, font, and design as the legitimate company’s messages. They ask you to click a link that looks legitimate in the e-mail message, but actually links you to their site, in which they ask you to “verify” personal information. Sometimes these messages include warnings designed to alarm the recipient, such as “We believe someone has tried to access your account and we need you to log in and verify your personal information.” Do not click the links in these e-mail messages. When you click to respond and then enter your personal information, these “phishers” gain access to your bank and credit card accounts, Web sites where your personal information is stored, and more.

Office Outlook 2007 includes phishing protection settings that are automatically enabled when you begin using the program. The options that control phishing protection are found in the Options tab of the Junk E-Mail Options dialog box (see Figure 10-21). Be sure to leave these two options selected to help protect you from phishing scams. To learn more, visit [www.microsoft.com/athome/security/email/phishing.mspx](http://www.microsoft.com/athome/security/email/phishing.mspx).

![Junk E-Mail Options dialog box](http://example.com/junkmailoptions.png)

**Figure 10-21** Two new phishing controls are in place in the Junk E-Mail Options dialog box.
Automatic Postmarking

A new feature in Office Outlook 2007 automatically adds postmarks to messages you send. The postmark includes the list of recipients and the time you sent the message, which is what makes the postmark valid as an identification of that unique message—spammers send thousands of e-mails out at one time from the same computer, which makes a unique postmark impossible. The e-mail program of the person receiving the postmarked e-mail recognizes the message as authentically from you and not likely to be spam.

**Improvements for Exchange Server 2007 Users**

Office Outlook 2007 includes some additional new features that are available for people using Exchange Server 2007. Here’s a quick list of some of the improved or added features:

- **Create different Out Of Office messages.** Now you can better control the messages you give to people who are trying to contact you when you’re out of the office or busy. You can schedule your Out Of Office Assistant for specific times—with a start and end time—so you don’t have to remember to turn the feature on and off. Additionally, you can create different away messages so you communicate to different audiences in different ways. For example, if you’re going off-site for several days, you might leave an internal message that encourages team members to call your cell phone or contact your assistant; for external contacts (clients and vendors, for example), you might provide a message saying that you are out of the office and will contact them when you return.

- **Include voice and fax messaging in your Inbox.** Now you can arrange to have voice mail and received faxes delivered directly to your Inbox so Office Outlook 2007 literally becomes the communications hub at the center of your day.
2007 Microsoft Office Outlook Behind-the-Scenes Interview

Jessica Arnold, Office Outlook 2007 Program Manager

1. Do you have a favorite new feature in Office Outlook 2007?  
   It’s hard to choose one feature in Office Outlook 2007 that I could claim as my favorite because there are so many new features that I use on a daily basis. However, I probably use the new Instant Search capability more frequently than any other—probably about 20 times a day! Because of the flexibility of the interface, I no longer waste time looking for an e-mail that might be buried among thousands of other e-mails. Using Instant Search, I can use just a few keywords to locate the piece of information I need, no matter in which folder it might be stored.

2. Do the changes come about as a result of user feedback? How so?  
   We take user feedback into account for every release of Office Outlook. When we looked at planning Office Outlook 2007 and redesigning the user interface, we went on customer visits and collected thousands of hours of data to understand what we could do to improve the user experience and positively affect users’ daily lives. From this data, we identified trends and key areas for investment that the development team used to propose and design features that we believe will have a significant impact on the way our customers work.

3. Does Office Outlook 2007 have what you think will be a “home run” feature that everyone will be talking about?  
   I think the improvements to time and task management will be incredibly useful for our users. The To-Do Bar, task integration with other Office programs, and the calendar really provide a great solution for users to be more effective and thus have more time to focus on the daily things that matter most.

4. Do you have a fun or interesting story about what it was like for you to be involved in this major release?  
   One of the most interesting and exciting parts about being involved in this release is seeing all of the little things that go into shipping a product such as Office Outlook 2007. From the number of pixels that go into the follow-up flag icon on the user interface to the addition of new languages that Office Outlook 2007 will be offered in, it takes an amazing amount of coordination and collaboration among our teams to put together a product that we’re really proud of. Seeing these pieces develop over the past two years and come together has been an incredible experience.