# Microsoft Outlook 2007

## Tips and Tricks

## Calendaring

### 1. Get the Big Picture with the To-Do Bar

See your calendar in conjunction with tickler reminders and to dos by using the "To-Do Bar." If the To-Do Bar is minimized (displayed vertically on the right side of your screen), click it once to bring it to Normal view (oriented horizontally). If the To-Do Bar is not visible, click the View menu at the top of the screen and choose To-Do Bar. Select "Normal" to see your To-Do Bar displayed horizontally.

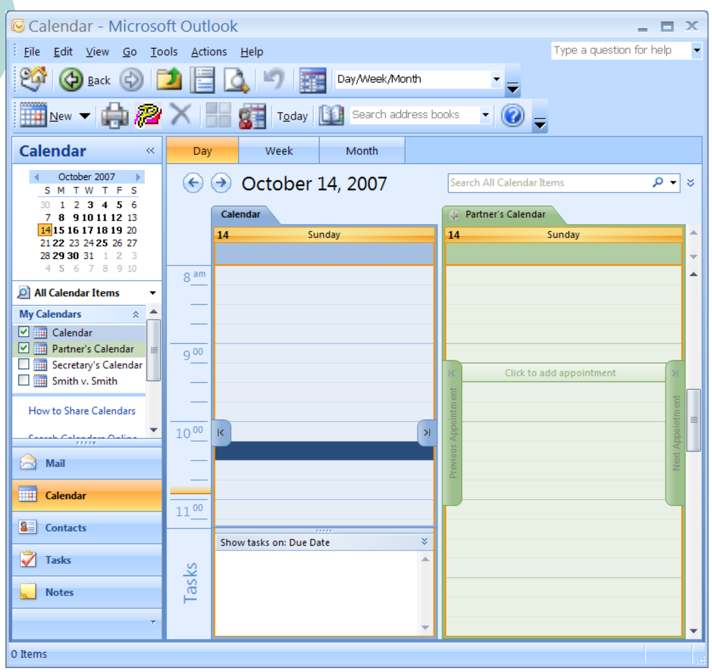
### 2. Block Out Time on Your Calendar to Get Tasks Done

Create the task. Click on Calendar in the Navigation Pane. In the Daily and Weekly calendar views, tasks appear at the bottom of the page. You can also make tasks visible by using the Normal view setting in the To-Do Bar (See instructions above.) Select and drag the task to the desired date/time on your calendar. (The task remains on the task list and is duplicated on the calendar as an "appointment," allowing you to use the allotted time to accomplish the task.) NOTE: Selecting is done by left-clicking the task ONCE, holding the left mouse button down, and dragging the task to the calendar.

### 3. Easily View Multiple Calendars

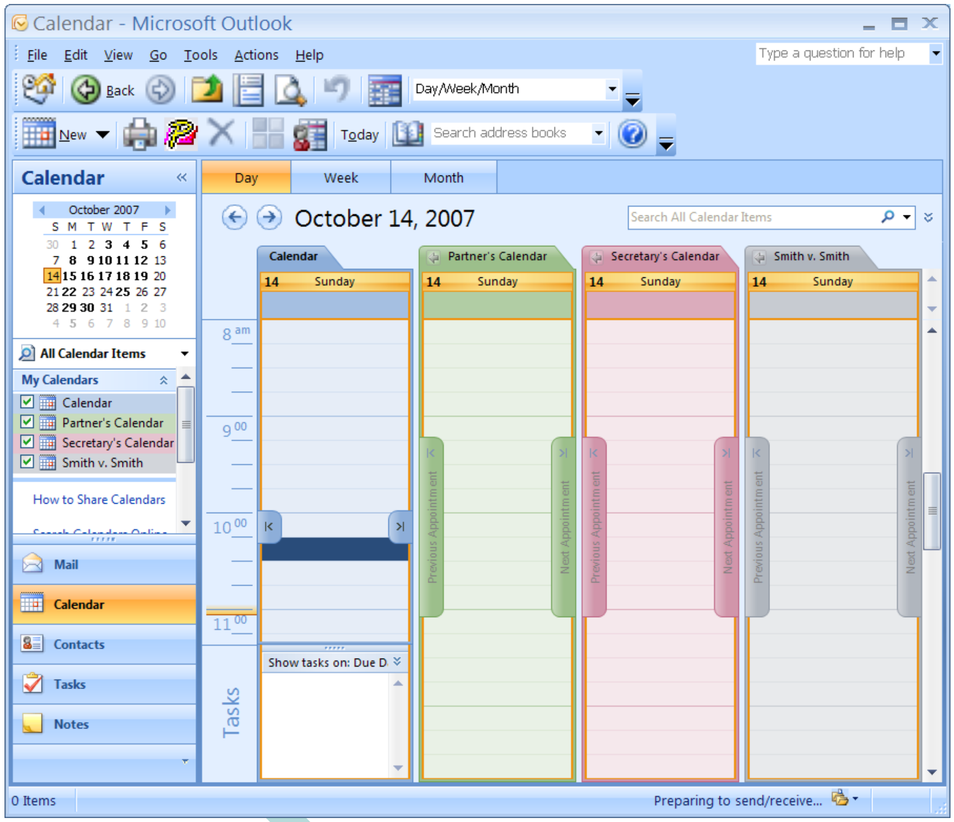
If you have shared calendar capability, or like to create multiple calendars for yourself (work commitments, personal commitments, calendars for specific cases), it's very easy to overlay your calendars or see them side-by-side. In the Navigation Pane, locate the calendars you wish to view. Left-click once in the check boxes next to the calendars you wish to see. Here is a sample side-by-side view of two calendars:

Select the calendars you wish to view



Here is a sample view of four calendars:

Check each box to see all 4 calendars side-by-side




To see multiple calendars in overlay mode, select the calendars you wish to view, click on the View menu, and choose View in Overlay Mode.

## 4. Three Ways to Share Calendars in Outlook 2007

1. Microsoft Exchange Server
   Requires a Microsoft Exchange Server account, specialized software, etc. Visit http://www.microsoft.com/exchange/default.mspx for more information.

2. Internet Calendars
   You can publish your calendar to the Internet and control who can access your calendar online. A Microsoft Exchange Account is not required. Online calendars are searchable. (See Free Resources from Microsoft for Outlook 2007 in this handout for more information.)

3. Calendar Snapshots
   E-mail your calendar to another person in an e-mail message. The calendar appears in the body of the message. NOTE: If the recipient is another Outlook 2007 user, they can choose to open your e-mail as an Outlook calendar and display your Calendar Snapshot side-by-side next to their Calendar. Recipients of Calendar Snapshots do not receive changes or updates unless you send them a new Calendar Snapshot. (See detailed directions, next page.)

Sending a Calendar Snapshot (E-mailing Your Calendar to Someone)

1. In **Calendar**, in the **Navigation Pane**, click **Send Calendar via E-mail**.

2. In the **To** box, enter the name of the person to whom you want to send the subscription information.

3. From the **Calendar** list, choose the calendar to send. By default, your default Calendar is selected. This is the Outlook calendar that is used to display your free/busy information to others and where meeting requests are accepted.

4. From the **Date Range** list, choose the amount of calendar data to include in your e-mail message, or click **Specify dates** to enter a custom date range. **TIP** If you choose a large date range or click **Whole calendar**, you might create a large e-mail message.

5. In the **Detail** list, choose the amount of detail to show the recipients. By default, the **Availability only** option is selected. None of the options include your items that are marked private — unless you change the privacy option in **Advanced** options.

6. Optionally, you can restrict the information that is included in the e-mail message to your working hours by selecting the **Only show time within my working hours** check box. To change your working hours, click **Set working hours**.

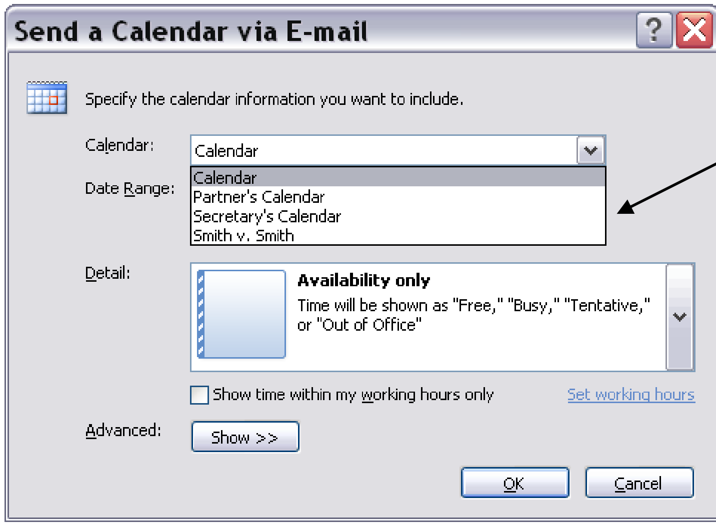
7. Optionally, click **Show** to see the following **Advanced** options:
   - **Include details of items marked private** This option requires **Detail** to be set to **Limited Details** or **Full Details**. The existence of private items will be included, but no further information will be shared.
   - **Include attachments within calendar items** This option requires **Detail** to be set to **Full Details**. All attachments on calendar items, such as spreadsheets, are included.
     **NOTE** This might increase the size of the e-mail message significantly.
   - **E-mail Layout** You can click **Daily schedule** or **List of events** to include your schedule or a list of events.

8. Optionally, you can request permissions to view the recipient's default calendar. To do so, select the **Request permission to view recipient's Calendar** check box.
   **NOTE** If you want access to an additional calendar that the recipient has created, for example, a personal calendar, you must send an e-mail message asking for permissions to that particular calendar. This option requests access only to the recipient's default calendar.

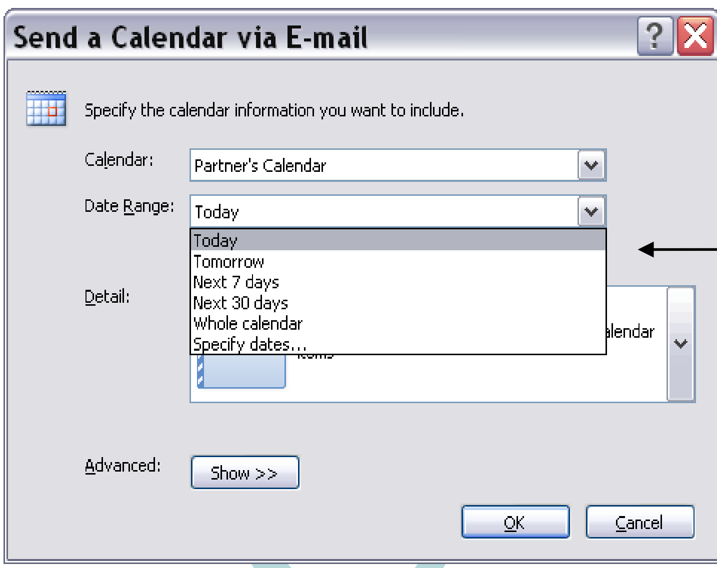
9. Click **Send**.

10. Review the confirmation dialog box, and then, if it is correct, click **OK**.
    If your calendar contains no items, a dialog box appears to provide you the option to cancel the e-mail message.

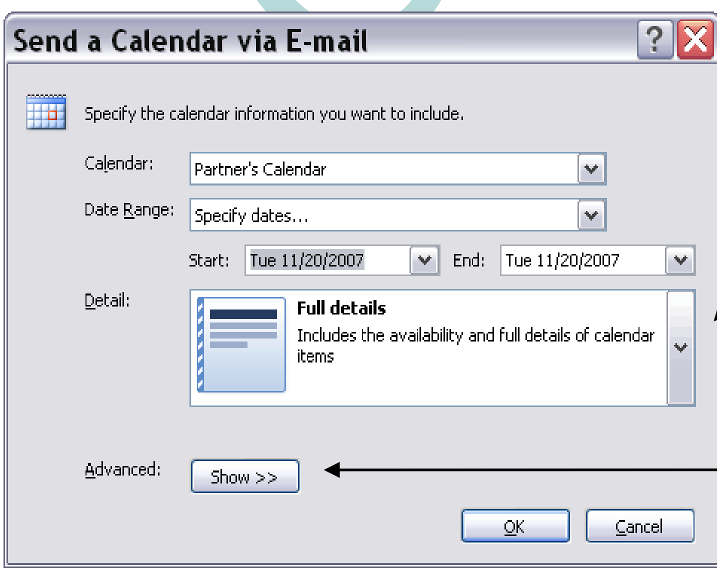
Selecting Options for E-Mailing Your Calendar:




Choose a calendar



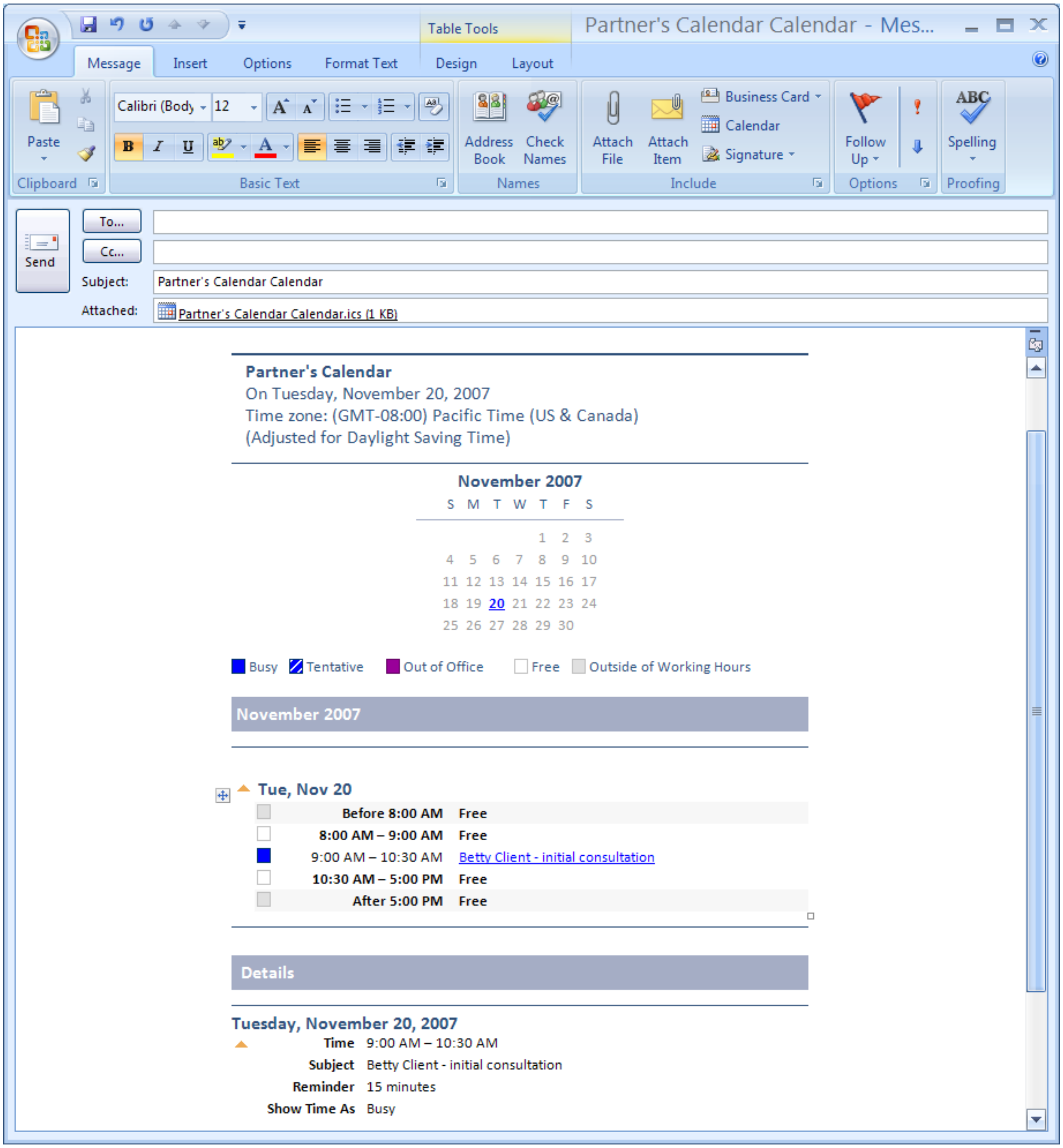

Choose a date




Choose the amount of detail you want to provide

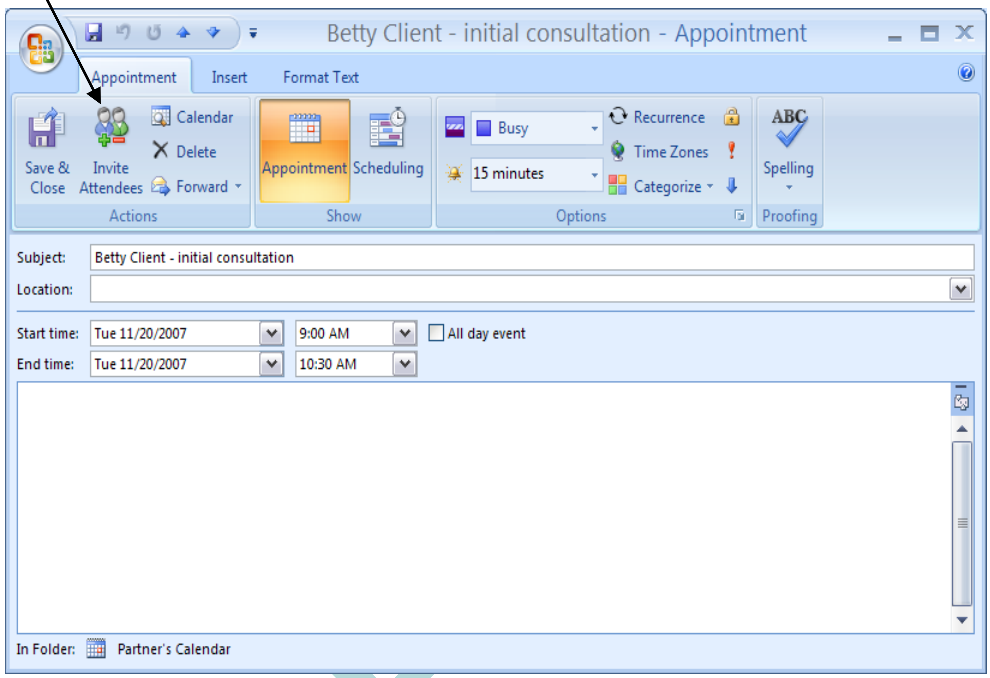
Click Show >> to see additional options (Make available details of items marked private, include attachments, and choose type of layout for your message.)

What a Calendar Snapshot looks like in an e-mail message:

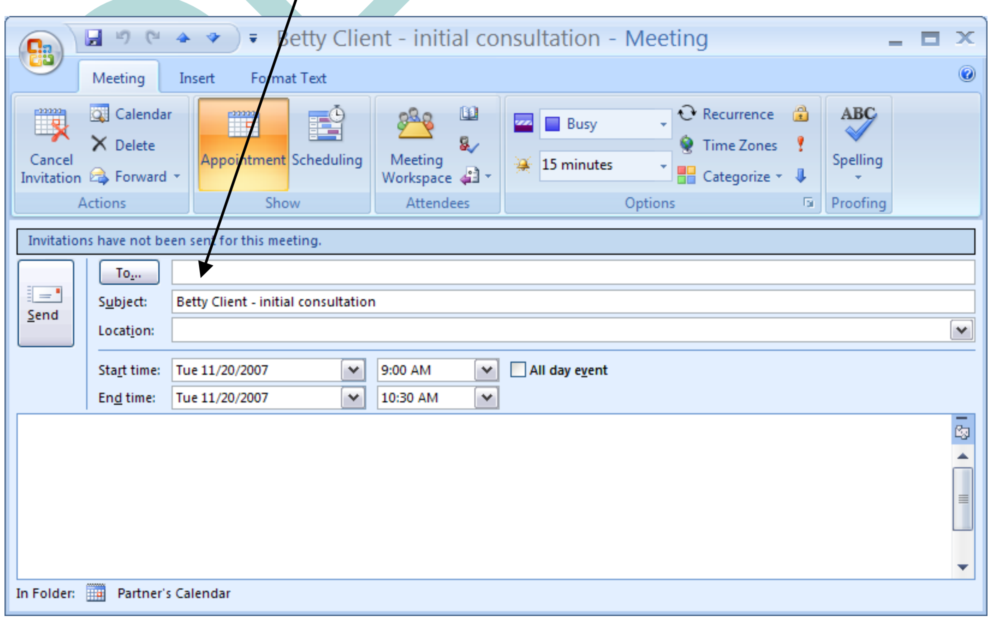


## 5. Inviting Attendees to Appointments

To invite someone to an appointment, simply open the appointment and click the "Invite Attendees" icon:

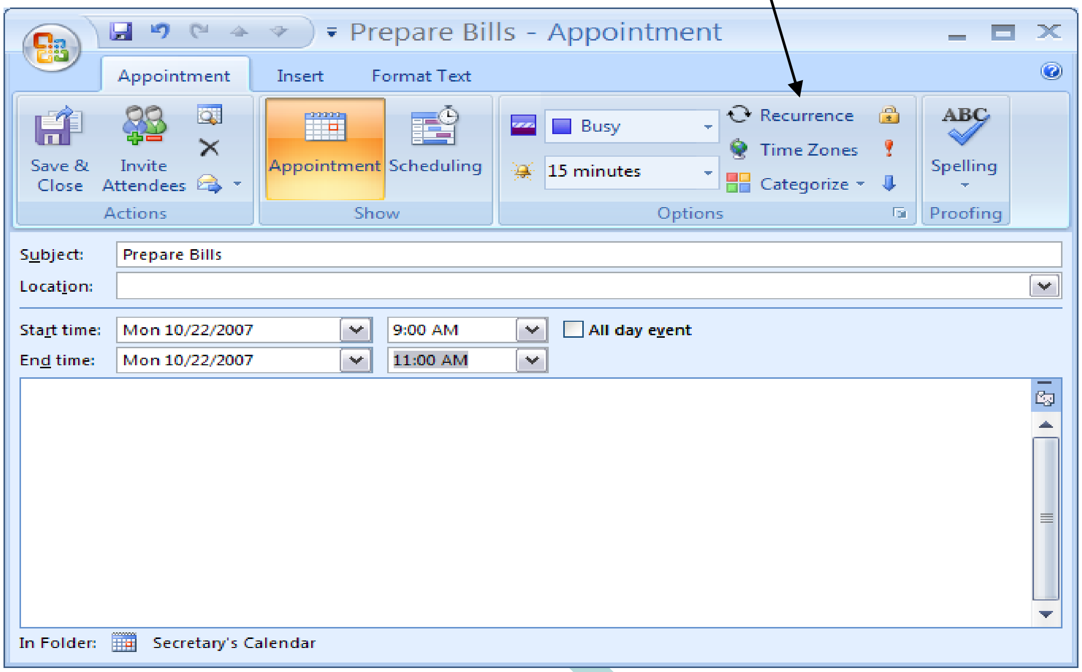



An e-mail message opens. Click in the To… box and enter the e-mail address of the person you wish to invite, then click Send:

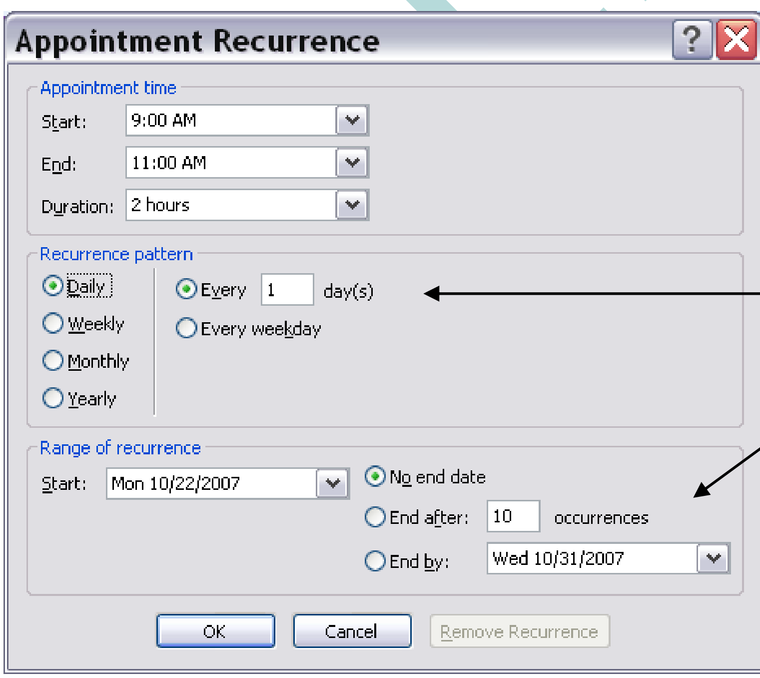


## 6. Create a Recurring Appointment (Applies to Tasks also)

Create a new appointment (From the File pull-down menu, choose: File, New, Appointment. From the Navigation Pane, click on Calendar, navigate to the date, and double-click in the desired time slot. Or click on Calendar in the Navigation Pane, and type the keyboard shortcut, <ctrl> N.) To make the appointment recurring, click the Recurrence button:



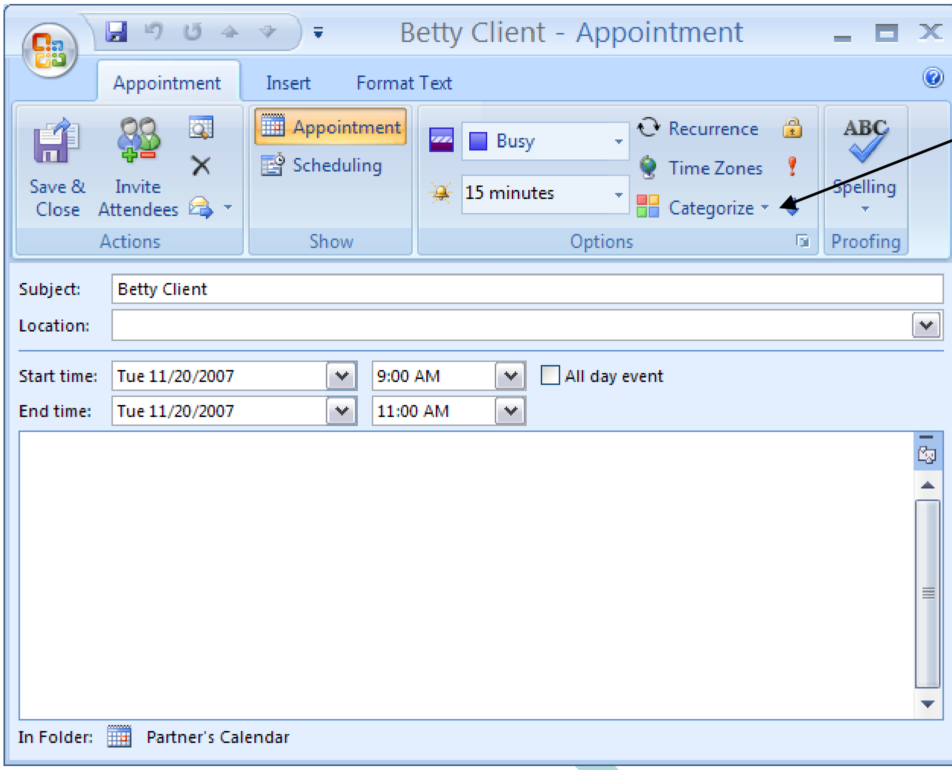

Choose a recurrence pattern:




Daily recurrences can be limited to weekdays. Weekly, Monthly or Yearly recurrences can be set to recur at any interval desired, such as: every 3 weeks, every 2 months, every 4 years (vs. once a week, once a month or once a year). The recurrence may have No end date, End after a specified number of occurrences, or End by a specific time.

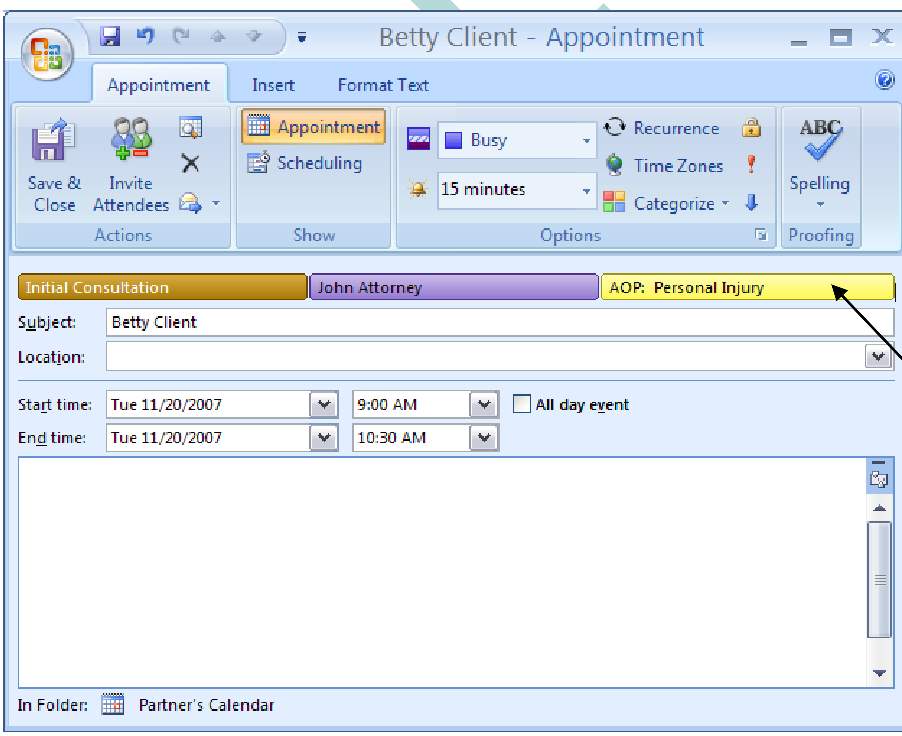
## 7. Use Color Coding (Applies in all of Outlook)

To color code appointments (or other items in Outlook), use the Categorize button:




Categorize button

Apply as many categories as you wish:

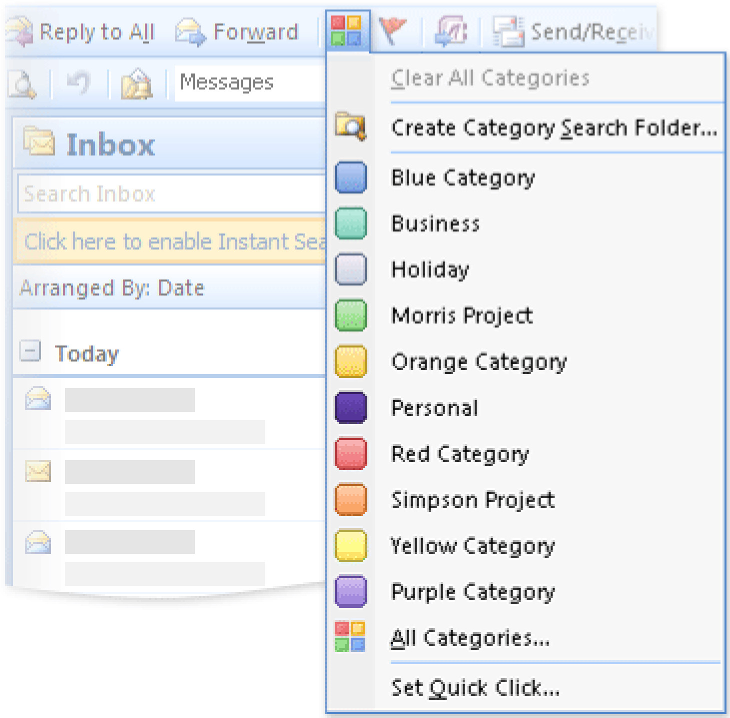



Use color-coded categories to signify that Betty Client's appointment is:

- An initial consultation
- John Attorney is the responsible lawyer
- The type of case is Personal Injury

To create a color category:

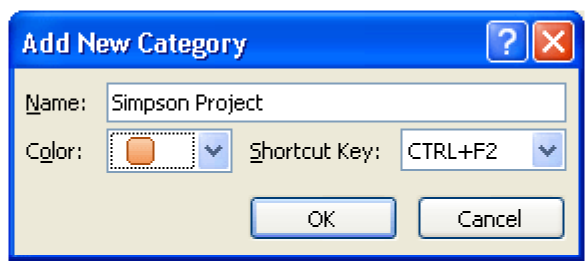
1. On the toolbar, click **Categorize**.
2. Click **All Categories**.




3. Click **New**.
   The **Add New Category** dialog box opens.

4. In the **Name** box, type a name for the new color category.

5. Click the arrow next to **Color**, click the color that you want, and then click **OK**.




Choosing a shortcut key is optional.

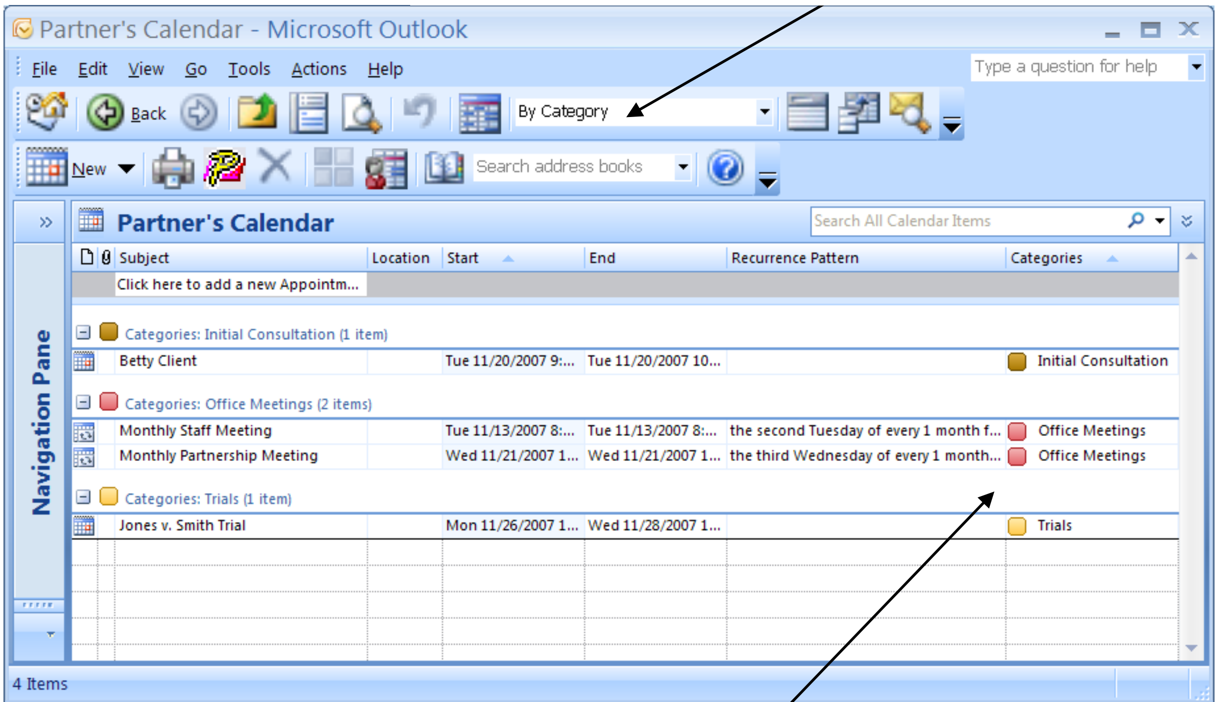
**NOTE** If you want to create a color category without a color assigned to it, click **None** in the color palette. Then the category will apply a name (and a shortcut key if you choose) to items, and you can sort and group the items according to the category. The items also will be available in the appropriate Category Search Folder.

Why Use Categories:

- Color categories enable you to quickly scan and locate **related** items.
- Color categories are prominently displayed in Table Views (or in open items).
- Calendars (tasks, contacts, and e-mails) can easily be sorted by category/color coding.

Here is a view of "Partner's Calendar" by Category, grouping together all like appointments and calendar dates:

Select "By Category" in the "Current View" pull-down list
or click the By Category button in the Navigation Pane.

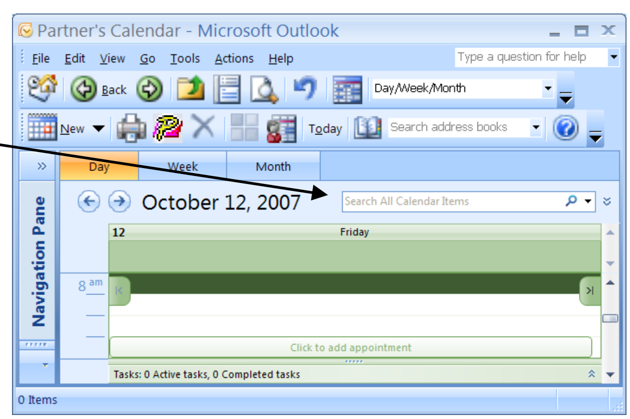



Calendar items are grouped by their color-coded categories:

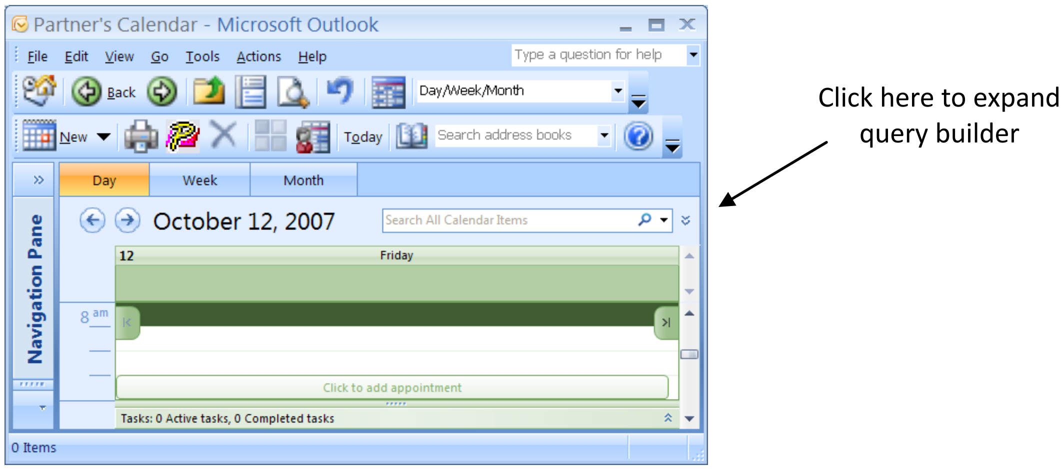
- Initial Consultations
- Office Meetings (staff and partnership meetings)
- Trials

To see only one category of calendar items, use the **Instant Search** feature. Navigate to the calendar you wish to search and locate the Instant Search box:

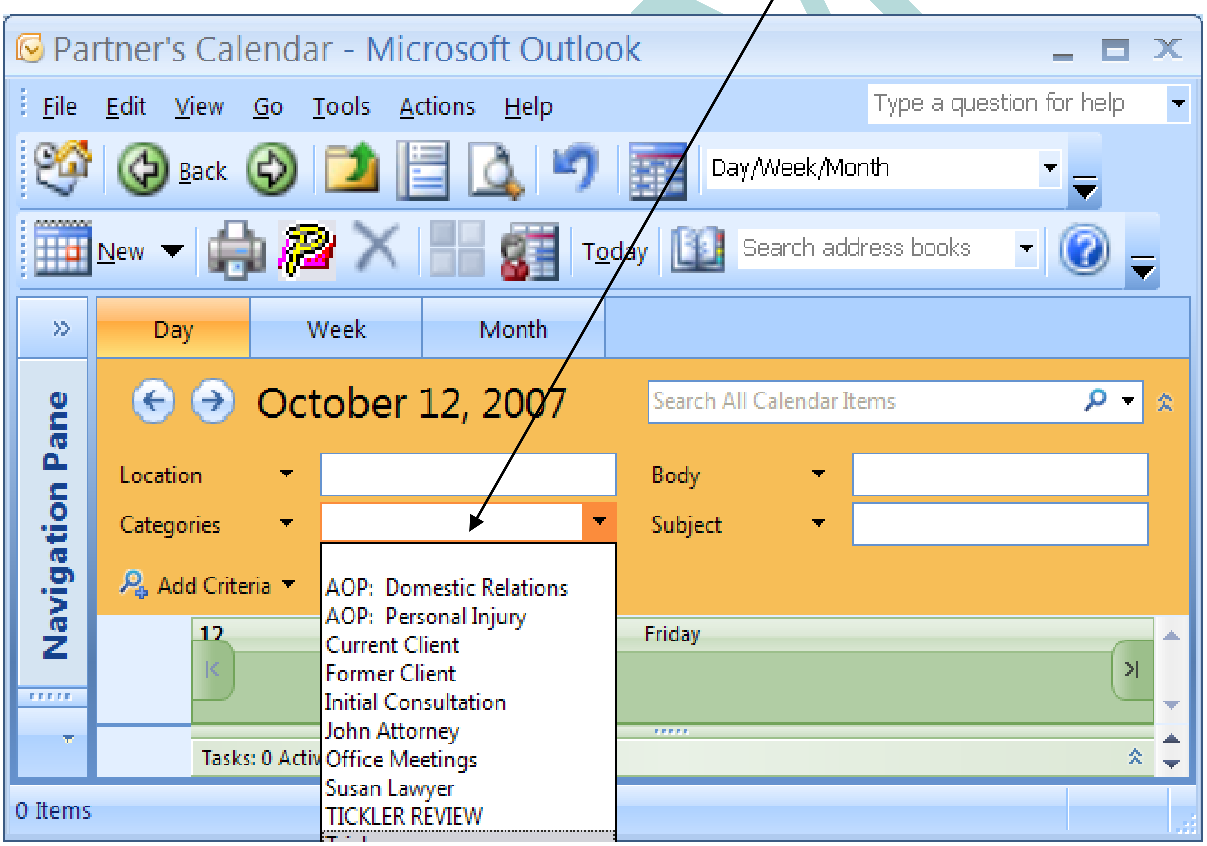
Instant Search Box



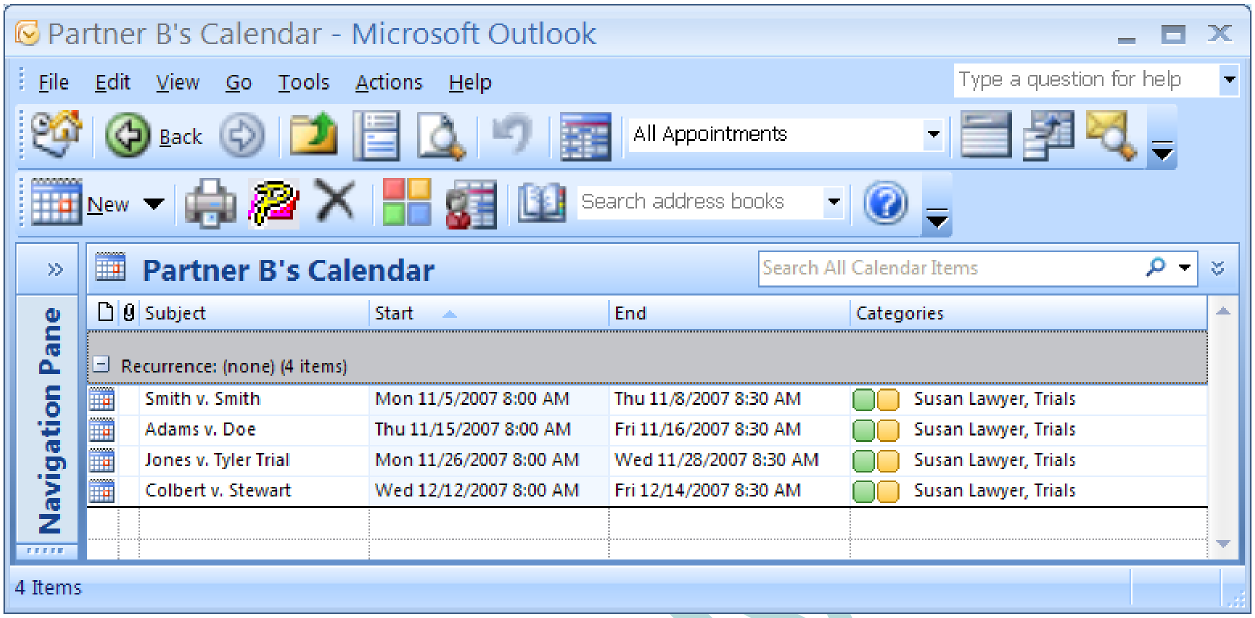
Click on the double chevrons to expand the query builder:




With the query builder expanded (see view below), click in the Categories box and choose the calendar item you wish to isolate:

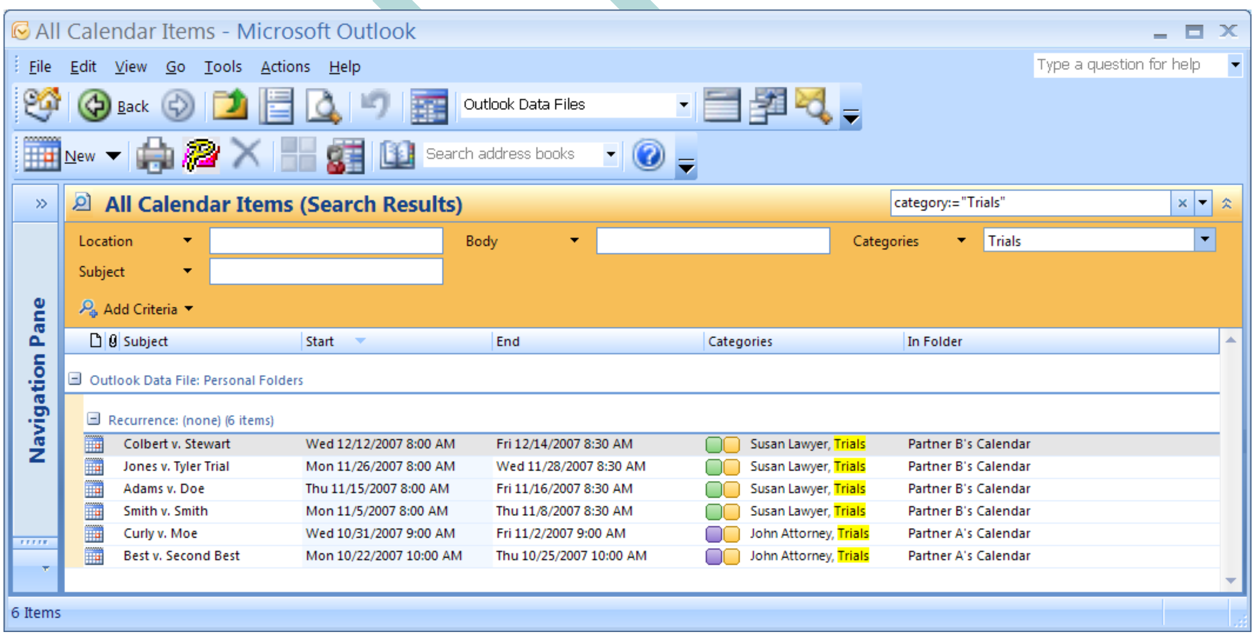


By choosing the category "Trials," we can see all the upcoming trial dates for a given partner, sorted by start date:




To see all Trials in the office, verify that "Search all Calendar Items" is highlighted in the Instant Search Box. If not, go to the Navigation Pane, highlight All Calendar Items, then click in the Instant Search Box, expand the query builder and search for Trials.

Here is a view of upcoming Trial dates for both lawyers in the office, sorted by start date:

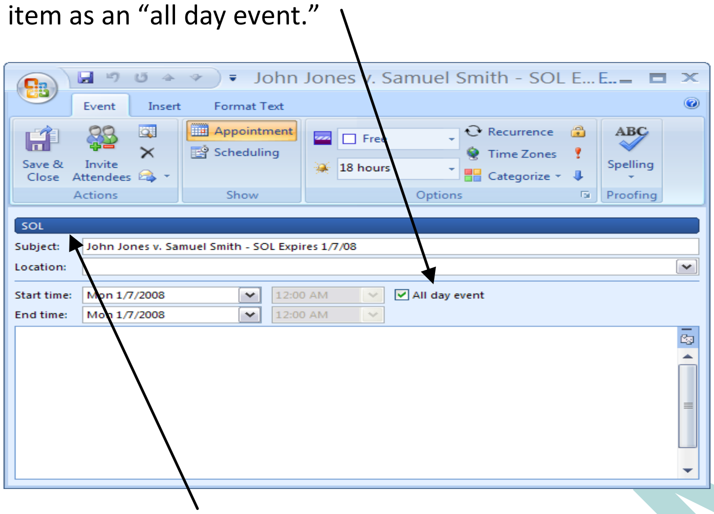



In this example, colors are assigned for each lawyer and for the calendar item Trials.

# Docketing

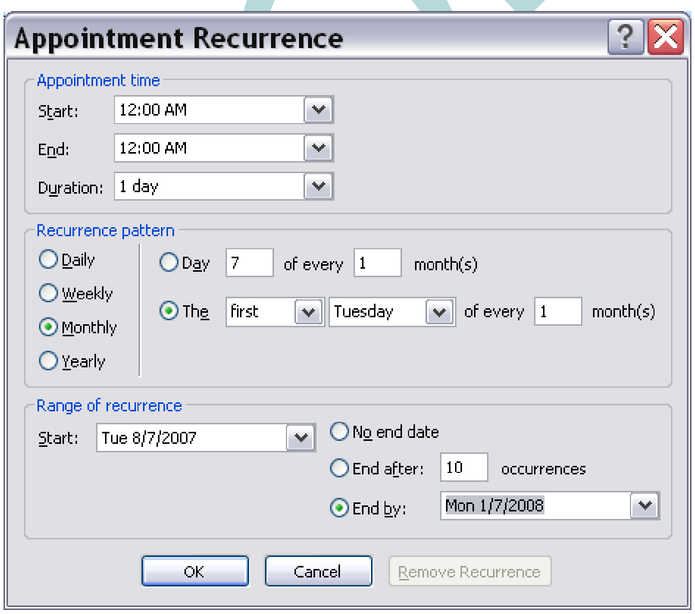
## 1. Docket Deadline Dates Using the Calendar

To docket statutes of limitation, tort claim notices, and similar deadlines in the Calendar, mark the item as an "all day event."



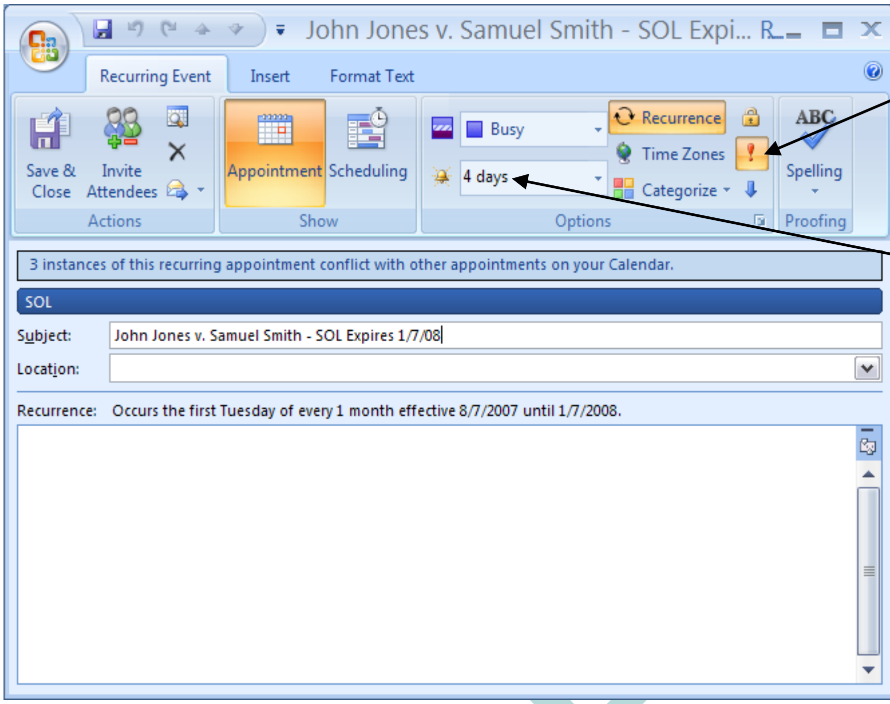

Consider assigning colors to deadlines such as a statute of limitation, so they stand out prominently on the calendar. (See using and creating color categories, above.) Remember you can also view calendar items By Category to see all color categorized items, such as statutes, tort claim notices, etc. Navigate to your calendar and choose "By Category" in the pull-down menu of the current view box.

Use the recurrence feature to give yourself multiple reminders of key deadlines. In this example, the SOL reminder recurs monthly on the first Tuesday of the month beginning on 8/7/07 (six months before the running of the statute) and ending on 1/7/08, the date the statute expires:




(See prior section for directions on how to make calendar or task items recurring.)

Consider using other calendaring features to make the deadline stand out, such as marking the item high in importance, and setting a reminder in addition to making the item recurring:

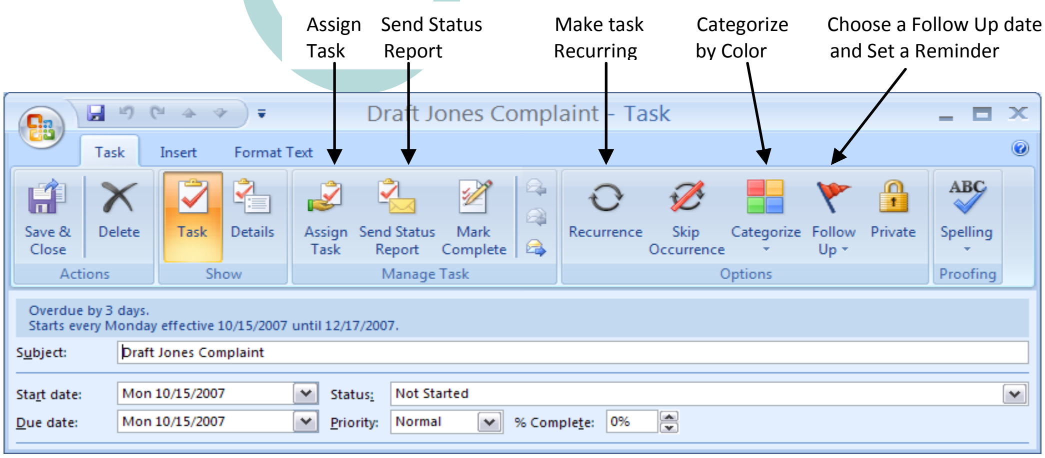



Mark the item as high in importance.

Set a reminder. Click in the reminder box, choose a time, and set an alarm sound. Note: You can access your Reminders at any time when you are in your Calendar or Task List by clicking on the View menu and choosing Reminders Window. The keyboard shortcut is Alt V i.

## 2. Docketing Deadlines Using Tasks

Deadlines can also be docketed using tasks. To create a new task (or any new item in Outlook), see the instructions below under Outlook Tidbits, "Creating New Entries." Note that you can **Assign the Task** to someone else (done via e-mail), **Send a Status Report** (done via e-mail), make the task recurring, color-categorize it, set a Follow-Up date and add a Reminder (click on the Follow Up flag).

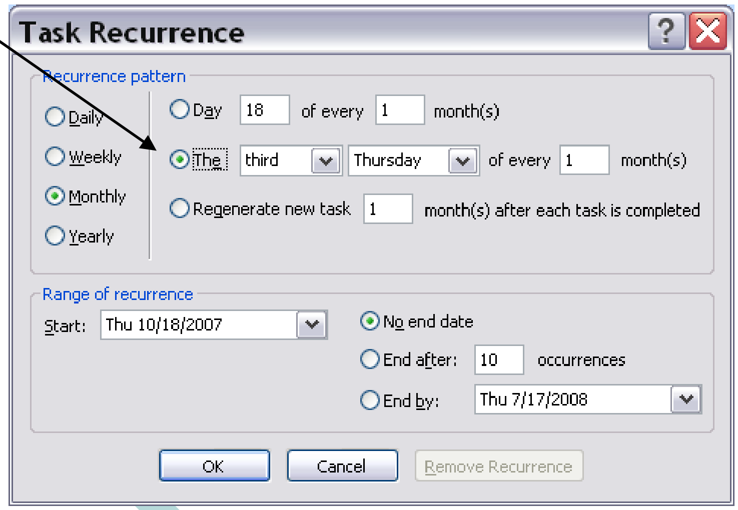



Using the Follow Up flag to set follow up dates and reminders will prevent you from missing important deadlines.

## File Tickling

Outlook can easily be used to tickle client files for review every 30 days. Simply follow the steps described below in Outlook Tidbits to create a new task and make it recur every 30 days. Here are some tips when using Outlook for file tickling:

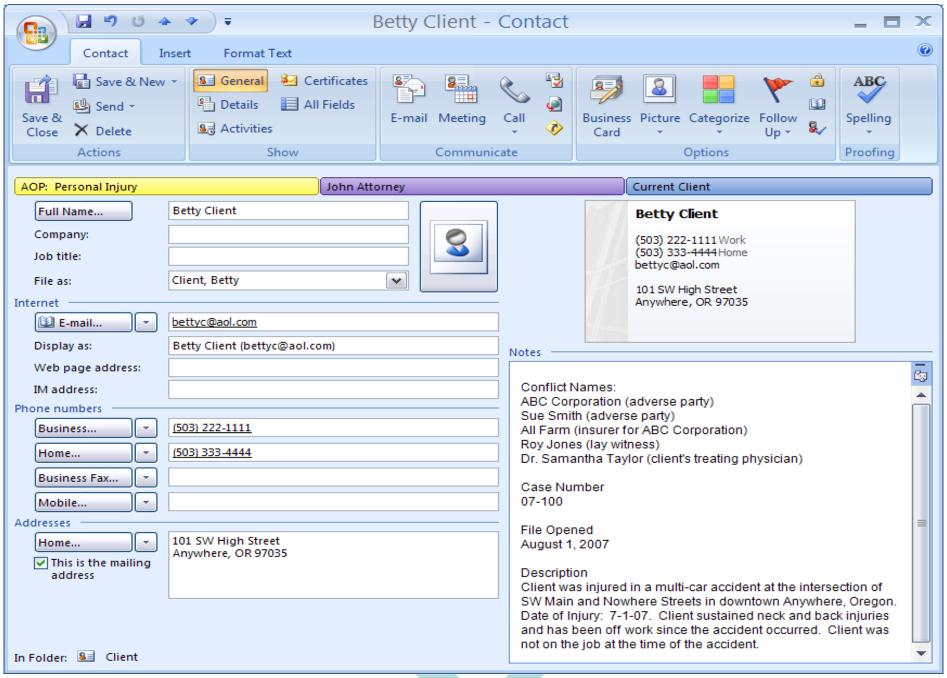
- To make the task recur every 30 days, choose the Monthly option.
- When setting the recurrence pattern, it is best to have the task recur on the $1^{st}$, $2^{nd}$, $3^{rd}$ or $4^{th}$ Monday, Tuesday, Wednesday, Thursday, or Friday of the month. (As opposed to a specific date, such as the $18^{th}$, which may fall on a weekend.)




- Do not set an "end" date for the task. The goal is to create a monthly tickler reminder that will remain on your task list indefinitely. You can delete the task permanently as part of your file closing procedure.
- In the subject line of the task, enter the name of the file to be reviewed.
- Remember that you can use the Follow Up flag to set follow ups and reminders. You can also assign tickle reviews to someone else by using the "Assign Task" button. The person to whom you delegate the task can then send you status reports by opening the task and clicking on "Send Status Report." For an example of what these buttons look like, see the example under "2. Docket Deadlines Using Tasks," above.
- You can view tasks "By Person Responsible." In the Navigation Pane, below **Current View**, click once next to "By Person Responsible." If you do not see this option under **Current View,** click once on the double chevrons next to the words **Current View** to expand the list
- Use the notes field (the big blank area at the bottom of the task) to enter any notes or other information you want to retain in conjunction with your monthly tickle reminder.
- Besides a monthly tickle date, which all your files should have to prevent them from falling through the cracks, you can also use Outlook Tasks to track specific to-dos on client files. The notes field has a tremendous capacity. Previous versions of Outlook could store 65,000 characters in the notes field of each contact, task, or calendar item. In a recent experiment, this author successfully copied and pasted in over 100,000 characters from a Word document into an Outlook notes field. (Don't count on being able to push these limits, but don't be shy either about copying and pasting in information from Word or WordPerfect into the Outlook notes field.)
- Manage your tickler system through your To-Do Bar (see description at the beginning of this handout) or by using your Tasks list.

# Conflict Management (The Basics)

Sole practitioners or small firms can track conflicts in Outlook 2007 using the Contacts feature of this program.  Here is a sample contact card used to track conflict information:

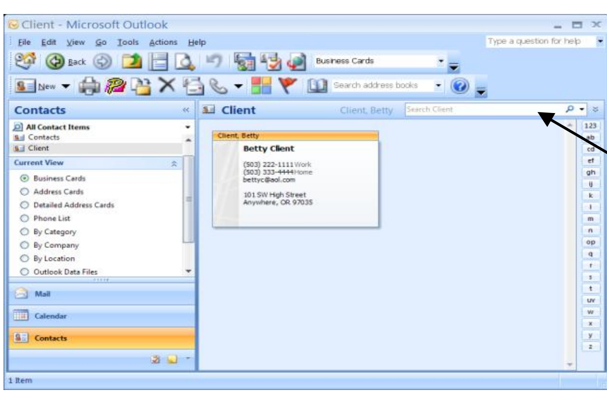



## 1. Creating Contact/Conflict Card Entries

Each client or client matter should be set up as a separate contact card with conflict names entered in the Notes field of the contact form.  Include all information recommended in the PLF practice aid, *Conflict of Interest Systems – Procedures.*  This practice aid is available on the PLF Web site at [www.osbplf.org](http://www.osbplf.org).  Click on Practice Aids and Forms, then choose the category, "Conflicts of Interest." The Notes field and other fields on the contact card can then be searched for names which may pose a conflict.

## 2. Basic Conflict Searching

To search for conflicts in Outlook 2007, locate the contact folder where your client contacts are stored.  In the **Search Contacts** box, type the name or other information you are searching for. If a match is found, Outlook will automatically display the card(s) which match the search term.




Search Contacts box

Open each matching card and determine if a conflict exists. Document the results of your conflict search in the client file. Contact cards can be printed in a Memo Style for filing – choose **File**, **Page Setup**, **Memo Style**. To preview before printing, click the **Print Preview** button. If you prefer to print search results in a list format, see step 4 below.

## 3. More Information

For more details on setting up a conflict system using Outlook contact cards, see **Instructions For Setting Up a Conflict System In Outlook 2007,** which appears later in this handout.

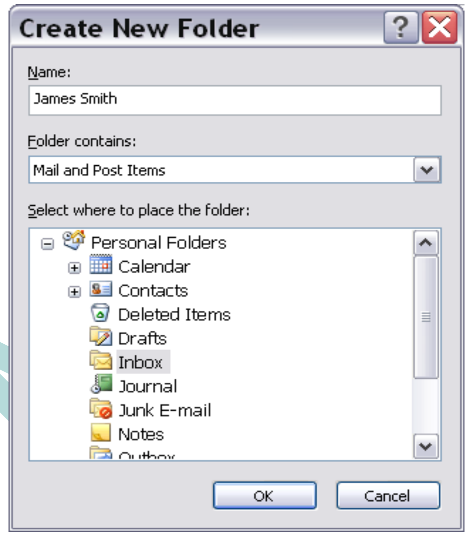
## 4. Exporting Data from Outlook to Case Management (or Other Software)

If you invest in case management software such as Time Matters, ProLaw, Abacus, Amicus, or others, you can easily export your contact/conflict cards from Outlook into your new database. Outlook offers a File Import/Export Wizard to guide you through the steps. Click on File, and choose Import and Export… When the wizard opens, choose "Export to a file" under the heading "Choose an action to perform." Click Next> and follow the on-screen steps. You will need to know the proper format for importing data into your new program. Most likely you will choose from Comma Separated Values (Windows) or Tab Separated Values (DOS), but check the instructions for your new case management software. NOTE: Exporting data from a folder in Outlook does not delete that data. When you are migrating to new software, it is generally advisable to retain the data in your old program for whatever period of time it takes to satisfy yourself that the information you exported came over cleanly and completely.

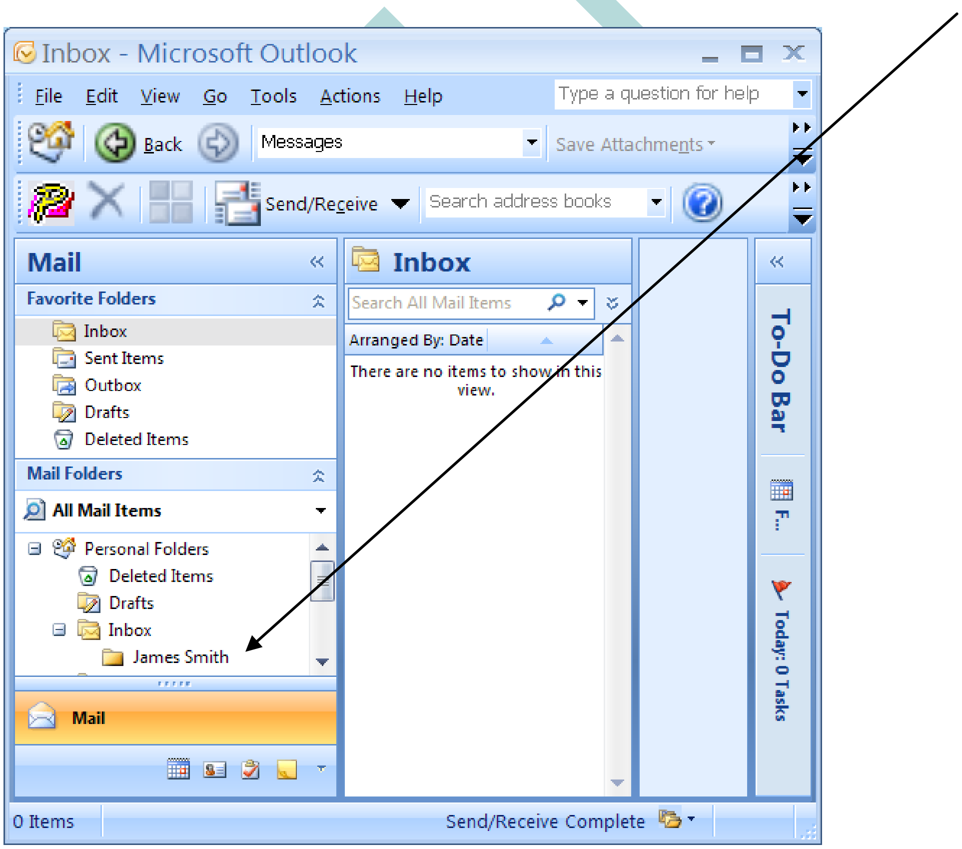
# E-mail Management

## 1. Use Folders to Manage and Organize E-Mail

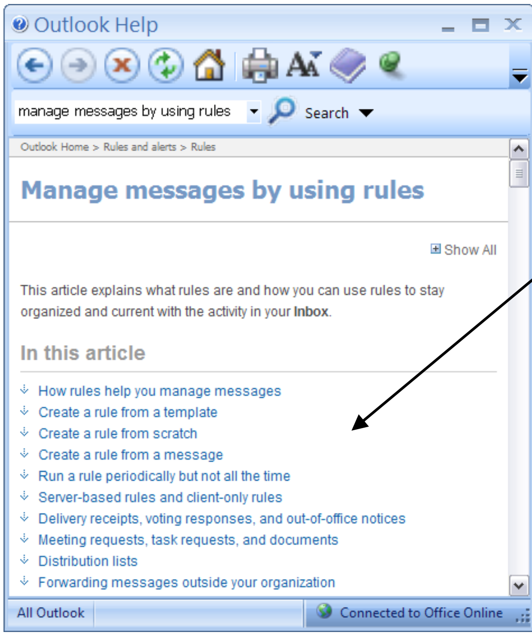
Create separate folders for each matter/client and save sent and received items to the assigned folder for easy access. To create a new folder for mail, navigate to the Mail tab on the Navigation Pane, click File, New ► and choose Folder… Give the folder a name (client's name or name of matter). Verify that your Inbox is highlighted and you are creating Mail and Post Items:




You should now have a folder called "James Smith" under the Inbox in your Navigation Pane:

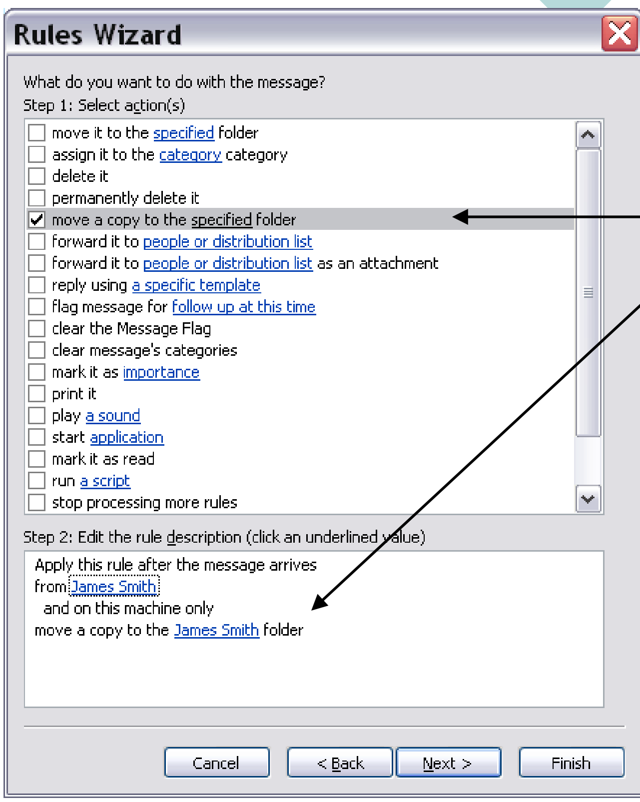


Once a folder is established, you can set up rules to direct your sent and received e-mails to specified folders. For instructions on using rules to manage your e-mail, click on Help and search for: "manage messages by using rules," and click on the first result:

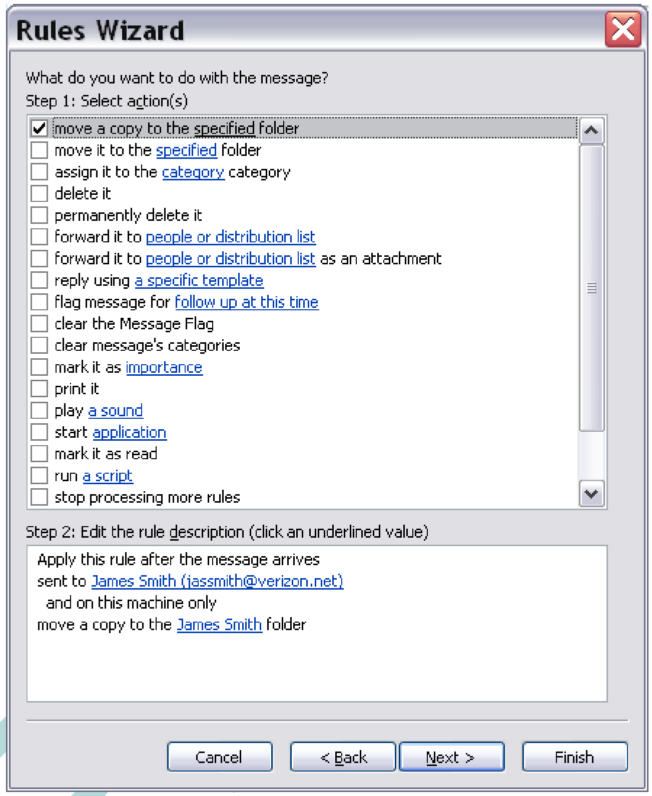



Use the links in this help topic to learn how to create and manage e-mail rules.

To copy all e-mail from client James Smith to his folder, set up a rule "Received from James Smith" with these settings:



To copy all e-mail sent to James Smith to his folder, set up a rule "Sent to James Smith" with these settings:




**2. Properly Store Client E-Mail as Part of the Client's File**

Client E-mail should be preserved as part of the client's file. Once e-mail is organized into client or matter folders in Outlook, it is simple to save all the e-mails in the client's folder to a text file (.txt) accessible by Notepad, WordPad, Word or WordPerfect.

Navigate to the folder where the client e-mails are stored, click Edit, Select All or use the keyboard shortcut Ctrl A. With the messages highlighted, click on File and choose Save As… Give the string of client e-mail messages a meaningful file name, such as James Smith E-mail Messages and store the text (.txt) file with the client's other electronic documents. **NOTE: This procedure does NOT capture attachments.**

To save attachments, select e-mails individually and choose File, Save Attachments. Or use the Save Attachments button if you have added it to your toolbar. (See Outlook Tidbits below to learn how to add buttons to your toolbars.) You may also capture an e-mail message and any attached files by saving the e-mail as an Outlook Message File. Click on File, Save As… and under "Save File as Type," choose Outlook Message Format (*.msg).

Outlook does permit you to archive e-mails and other Outlook items into a Personal Folder File (.pst). Unfortunately, the only way to retrieve and view archived e-mails (or other items) is to import them back into Outlook.

Preserve electronic documents according to PLF guidelines for storing files. See the PLF practice aid, *File Retention and Destruction,* available on the PLF Web site at www.osbplf.org. Click on Practice

Aids and Forms and follow the link to File Management. For more suggestions on properly archiving client e-mail, see the practice aid, *Managing Client E-mail*. Once at the PLF Web site, click on Practice Aids and Forms and follow the link to Technology.

**3. Easily Create Tasks from E-Mails**

Open the e-mail message, click on the Follow Up flag and choose a Follow Up date or set a reminder. The e-mail will now appear as a task on your To-Do Bar. For more information, see the *Outlook 2007 Product Guide* referenced in "Free Resources from Microsoft for Outlook 2007," which follows this handout. You can also "drag" an e-mail to tasks by highlighting or selecting it, and moving it to the Tasks area of the Navigation Pane while holding your left mouse button down. The subject line of the e-mail becomes the subject line of the task. The e-mail message appears in notes. (Dragging an e-mail to tasks does not capture attached files.)

**4. Previewing Attachments, RSS Feeds and More!**

Outlook is rich with features. Check out "Free Resources from Microsoft for Outlook 2007" which follows this handout.

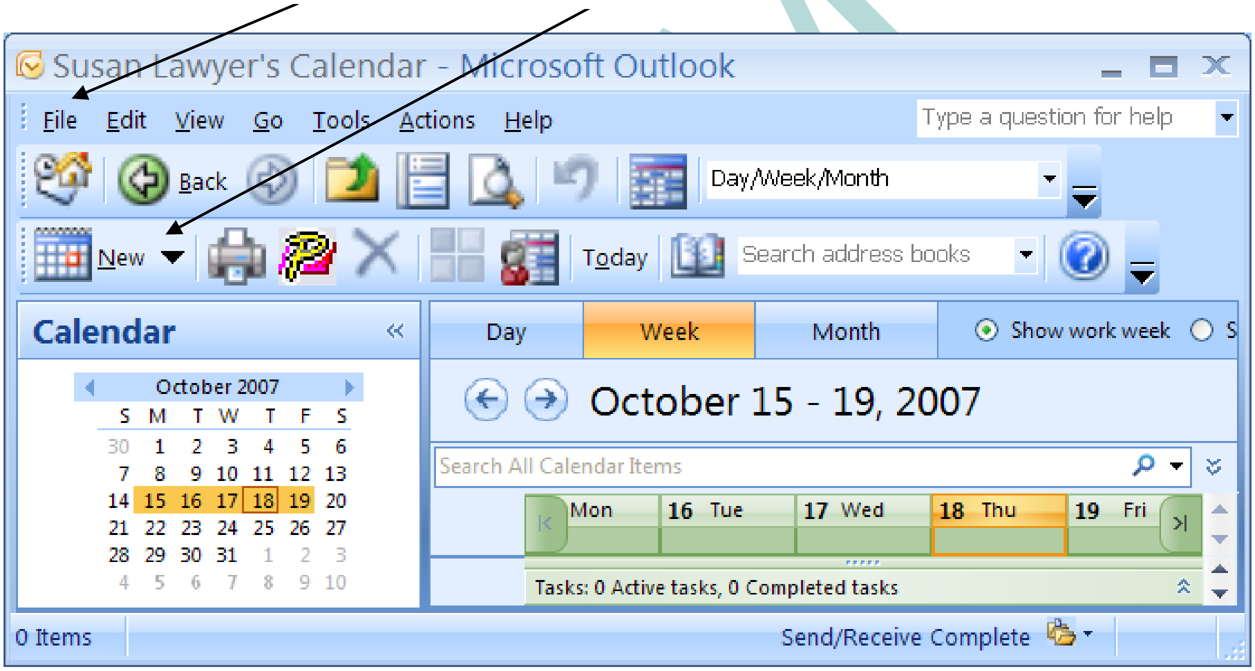
# Outlook Tidbits

## 1. Creating New Entries (E-mails, Calendar items, Tasks, Contacts, Notes)

To create any new items – e-mail message, calendar entry, task, contact, or note: Click on File, New in your Standard Toolbar and point to the item you wish to create. The keyboard shortcut to access this menu is Alt F, W. You can also click on the New ▾ button on your toolbar. Alternatively, you can create a new item by navigating to the appropriate area, such as Mail, Calendar, Contacts, Tasks or Notes through the Navigation Pane. Once there, use the Windows shortcut Ctrl N. For example, click on Calendar in the Navigation Pane, type Ctrl N, and a new blank appointment slip appears. Another option is to navigate to the appropriate location and double-click in a blank area. For example, click on Tasks in the Navigation Pane, scroll to a blank area of your Tasks list, and double-click. A new blank task appears. Calendar entries can be created by navigating to a date on the Calendar and double-clicking in the appropriate time slot.

File, New

New ▾ button



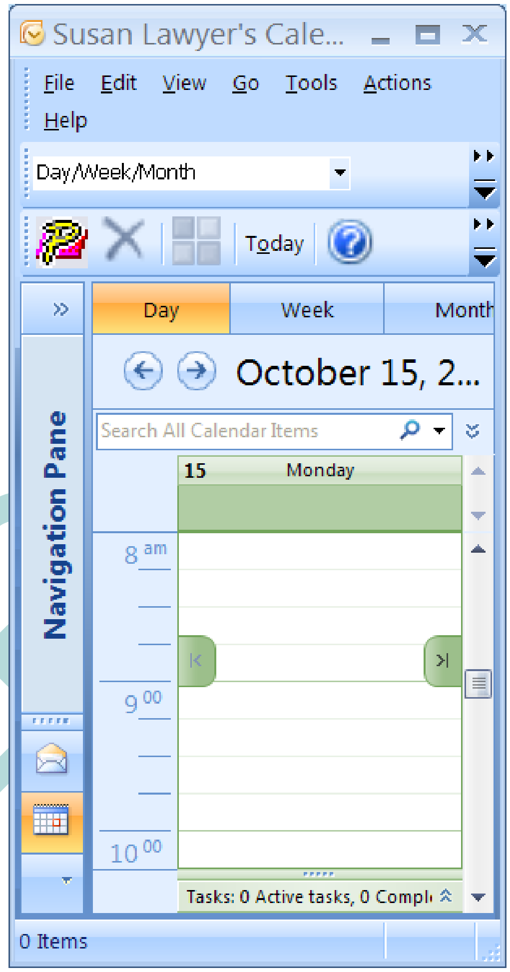

## 2. Changing the View

If you don't like the look of things, click on View in your Standard toolbar and choose Current View. Make a new selection. The keyboard shortcut to bring up this menu choice is Alt V, V. You can permanently change the Current View by choosing Customize Current View… or Define Views, depending on what you want to accomplish.

## 3. Help! My Navigation Pane Disappeared

Click on View, Navigation Pane► and Select Normal. This selection will also work if your Navigation Pane is minimized. Otherwise, click on the double chevrons >> at the top of the minimized Navigation Pane to expand it back to Normal:

Click on the double chevrons >> to expand a minimized Navigation Pane. This is a good trick to know any where in Microsoft Office, as double chevrons >> are a universal indication that a menu or navigation feature has been minimized.




## 4. Managing Addresses and Using the OAB (Outlook Address Book)

For assistance with this feature, click on Help and search for "address book." Scroll down the results list and choose "Manage Addresses in Outlook 2007."

Outlook automatically "remembers" everyone you e-mail. Retaining an unwanted e-mail address can be frustrating. If you attempt to e-mail someone and enter the wrong address, Outlook remembers the bad address. There may also be occasions when you e-mail someone, have no need to contact them in the future, and wish to remove the e-mail address because it is a close match to a client or other important contact and you don't want to mistakenly e-mail the wrong person. Understandably, then, a very common question is: "How do I get rid of an e-mail address that I no longer want in Outlook?" Here's how to do it. Bring up the help entry, "Manage Addresses in Outlook 2007," and choose ↓ Removing addresses.

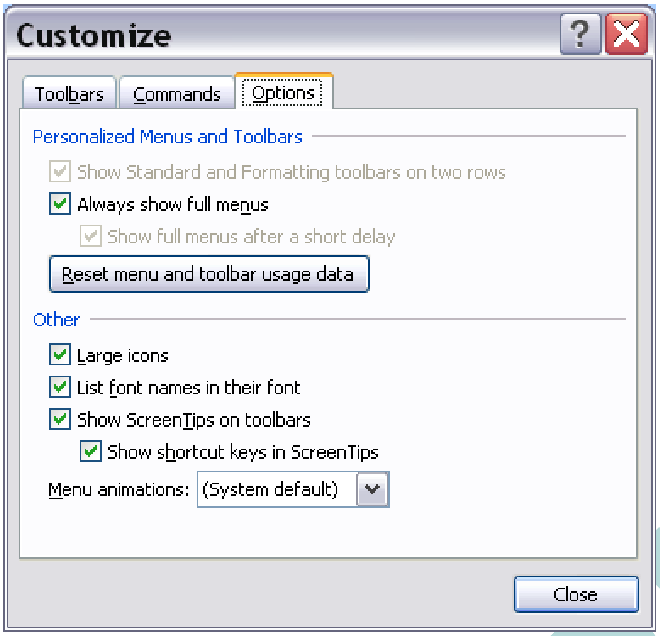

5. **Customizing Toolbars, Toolbar Buttons, Icons, Fonts, and Menu Lists using Tools, Customize…**

Displaying and Adding New Toolbars
Under the Toolbars tab, turn toolbars on or off by placing a checkmark in the box next to the toolbar. To create a new toolbar, click New…

Adding New Buttons (Commands) to a Toolbar (Try Save Attachments ▶ )
To add new buttons to a toolbar, click on Commands. Scroll through the Categories on your left to find the commands on your **right** that you wish to add. For example, choose File under Categories. On the Commands side scroll down, locate Save Attachments ▶ and left click once to highlight it. Hold the left mouse button down and drag this button to a toolbar until it "docks." (If you are not familiar with this maneuver, search in Help under "customize toolbars" for complete directions.) You can now automatically save attachments from an e-mail without opening it first, or speed up the process when you are viewing an e-mail.

Options:  Icons, Fonts, and Menus, Oh My!

To list fonts and change the size of icons, click on the Options tab.   This is also where you can turn on shortcut keys, screen tips, and display full menus:

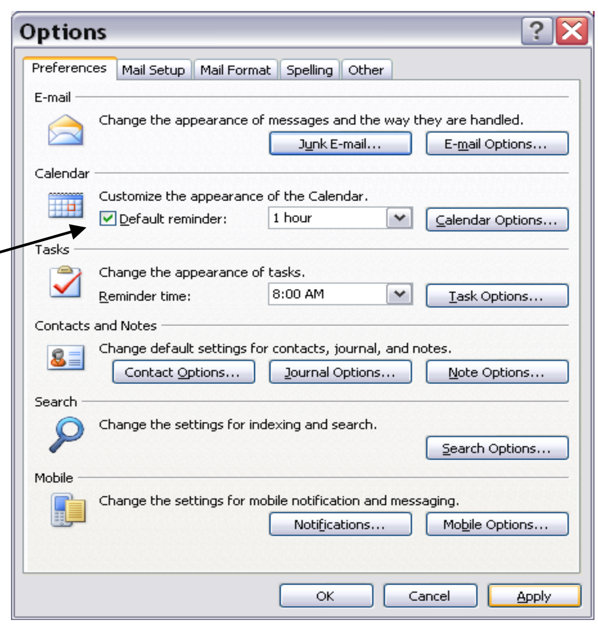



**6.   Customizing Anything Else in Outlook:  Click on Tools, Options...**

Settings here control items such as:

- Color coding for overdue tasks (click on Task Options... under the Preferences tab.)
- Automatic reminders for tasks with due dates (click on Task Options... under the Preferences tab and put a check mark in the box, "Set reminders for tasks with due dates" to make reminders automatic.
- How your calendar is displayed; default reminders.  Click on Calendar Options... under the Preferences tab.  To set a default reminder for calendar items, put a check mark in the box, Default reminder: and choose the time.  Click OK.

Set an automatic default reminder for calendar items.



- Tools, Options… is also the place to control how contacts are listed (click on Contact Options under the Preferences tab); the color, font, and font size of Notes (click on Note Options… under the Preferences tab); and mobile settings, processing of e-mail, etc.
- See the Other tab for AutoArchive settings, customizing options for the Outlook Panes, using Outlook as the default program for e-mail, contacts, and calendaring, and controlling whether your Deleted Items Folder is emptied upon exiting.
  **NOTE: DO NOT USE YOUR "DELETED ITEMS" FOLDER AS A FILING SYSTEM FOR E-MAILS. PROPERLY STORE THEM AS DESCRIBED ABOVE!!!**
- To create an e-mail signature, click on the Mail Format tab and choose Signatures…
- To change how Outlook handles unsent messages and sent messages, click on E-mail Options… under the Preferences tab.
- To change how e-mails are tracked (verifying the date/time a message was received and other settings), click on E-mail Options… then choose Tracking Options…
- To control how often Outlook automatically saves unsent messages, default settings for importance and sensitivity of sent messages, automatic name checking when addressing e-mails, and e-mail notification (what to do when a new item arrives in your Inbox): click on E-mail Options… and Advanced E-mail Options…

**7. And That's Not All**

There is so much more to Outlook. We haven't even scratched the surface. Use the resource sheets provided with this handout, don't hesitate to use Help to search for topics of interest, and go online to learn more.