Making the Most of Outlook and OneNote in Office 2010

K2 Enterprises

Making the Most of Outlook and OneNote in Office 2010

Contents

Session Description:

Do you know what Outlook 2010 and its new sibling, OneNote 2010 can do for you? Outlook 2010 features Quick Steps, Conversation View, and other time-saving features which can help you work more effectively. OneNote integrates seamlessly with Outlook and fills the void that many accountants encounter in keeping track of daily information. Come find out how Outlook 2010 can save you hours of time per week, and how you can use OneNote to organize, collaborate, share, search, and sync your notes with others.

Using Outlook 2010 – The Ribbon Interface

Outlook 2010 users must now deal with the ribbon interface. Those users migrating from Office 2007 will not face a steep learning curve because Office 2007 used the ribbon interface. However, those upgrading from Office 2003 or earlier editions will find the change disruptive at first. The biggest challenge will be to find where frequently used commands are placed in the ribbon. Notwithstanding the problems you may encounter, the ribbon provides a number of advantages, among them much better organization of settings and menu options than found in prior versions. Options are easy to find and settings are straightforward, as shown in **Figure 1**.

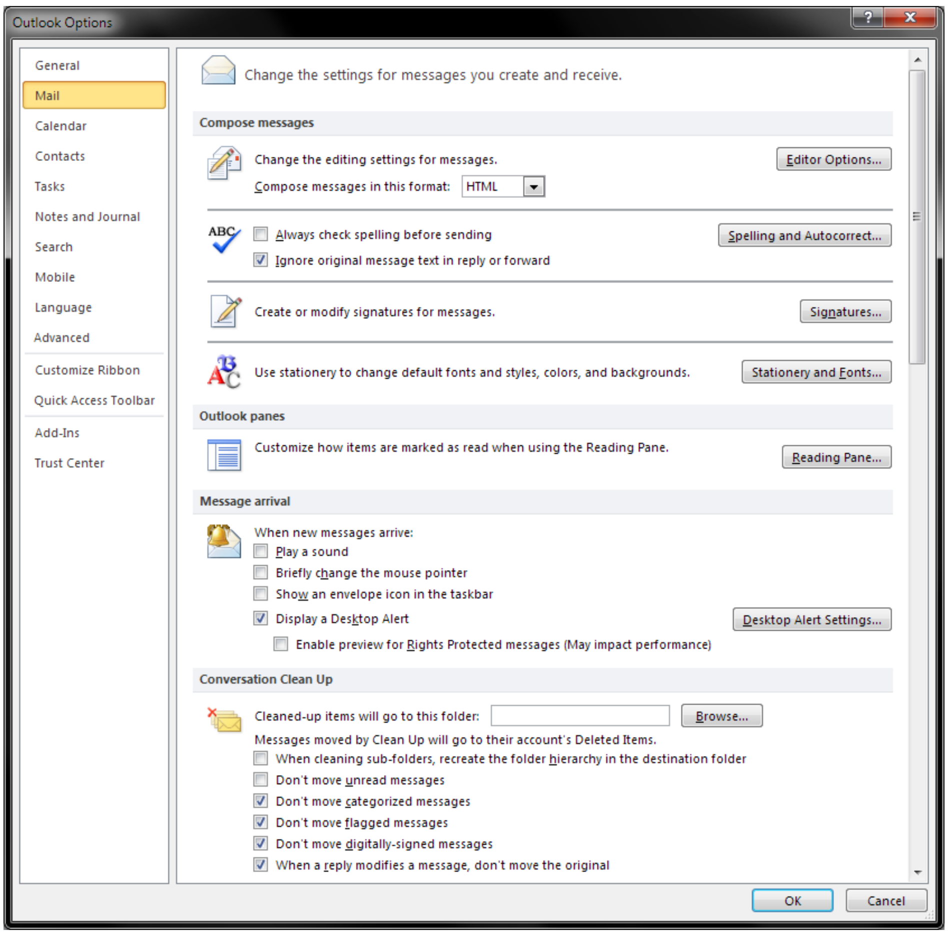


Figure 1 – Setting Section of the Ribbon

Modifying the Quick Access Toolbar

First, users should modify the Quick Access Toolbar (QAT) to improve productivity. The few minutes that it takes to make these modifications will pay handsome dividends. K2 instructors recommend making the following changes:

1. Right-click on the QAT and select **Show Quick Access Toolbar Below the Ribbon**. Moving the QAT reduces the amount of mouse movement to access the toolbar and makes it easier to read.

2. Add frequently used commands to the QAT. For example, if you often work on slow network connections, add the **Work Offline** command from the **Send/Receive** tab. Simply right-click on any command in the ribbon and select **Add to Quick Access Toolbar** from the context-sensitive menu.

3. Customize the QAT to include commands that are not found in the ribbon. Right-click on the QAT and select Customize Quick Access Toolbar to open the **Outlook Options** dialog box shown in **Figure 2**. From here you can commands, such as **Save All Attachments**, as well as rearrange commands or add separators to better organize the QAT.

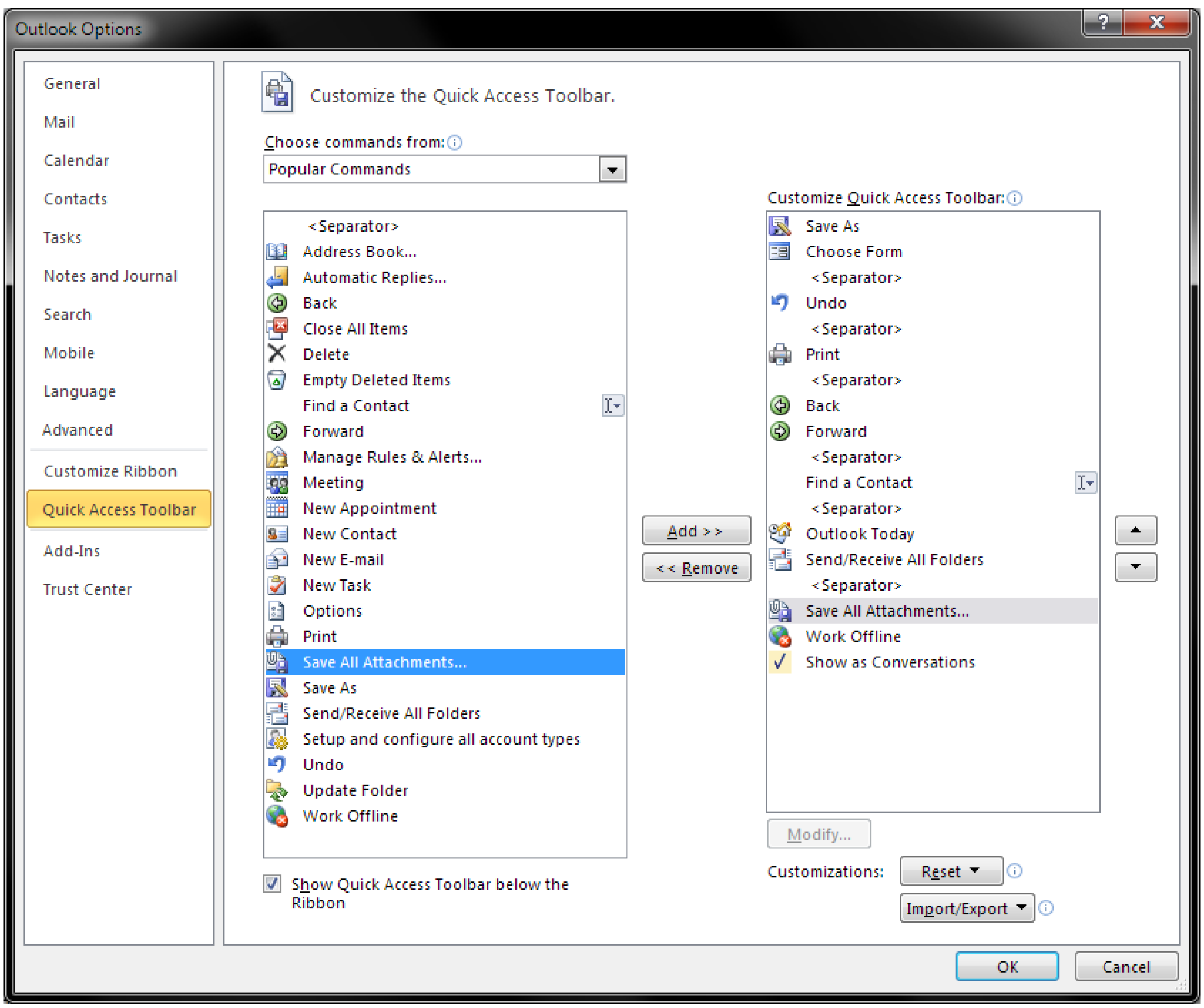


Figure 2 – Modifying the Quick Access Toolbar

Work With the Conversation View (2010 only)

E-mail messages can now be viewed by Conversation. When Conversations are enabled, messages in the Message List that *share the same subject* can be viewed in a single thread. Users can quickly review and act on individual messages or complete Conversations. Conversations are identified in the Message List with a white arrow point. The messages *within* each Conversation are sorted with the newest message at the top of the expanded list. As new messages in the thread are received, the entire Conversation is positioned in the Message List in the Date order currently active. When users click on a Conversation header in the Message List, the newest message in the thread is displayed in the Reading Pane. Any Conversation that contains unread messages has a bold subject in the message header along with a count of the unread messages in the thread. Expanded Conversations display any unread messages with a bold heading. In default, Conversations can include messages from multiple folders. For example, messages sent by a user are typically saved in the Sent Items folder, but will appear and be grouped in a Conversation with messages in the Inbox, as shown in **Figure 3**.

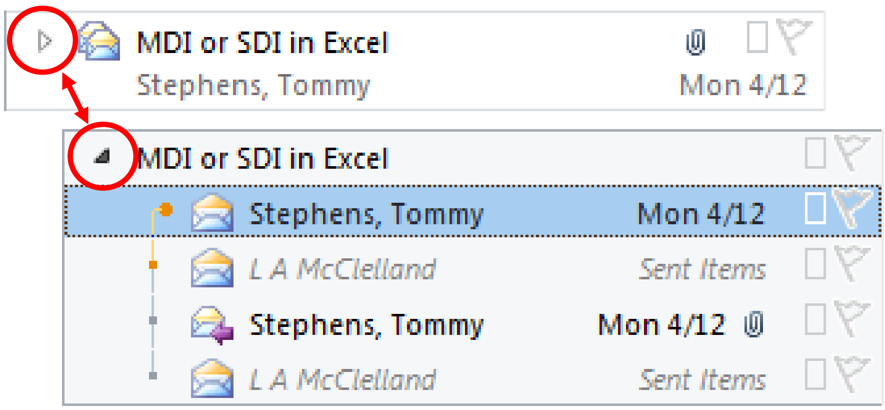


Figure 3 – Conversation Thread Expanded in the Message List

When a message gets two or more responses, a Conversation can split into multiple related but separate threads, as shown in **Figure 4**. Click on one of the splits to show the messages from that split in the Reading Pane. Click on an individual message inside a split to display its Reply Line - a dotted line that shows the messages to which it replies. Note that the Conversation in **Figure 4** displays the messages using the optional indented view, which shows the newest message at the bottom of the thread. To use the indented view, select **View, Conversations, Use Classic Indented View**.

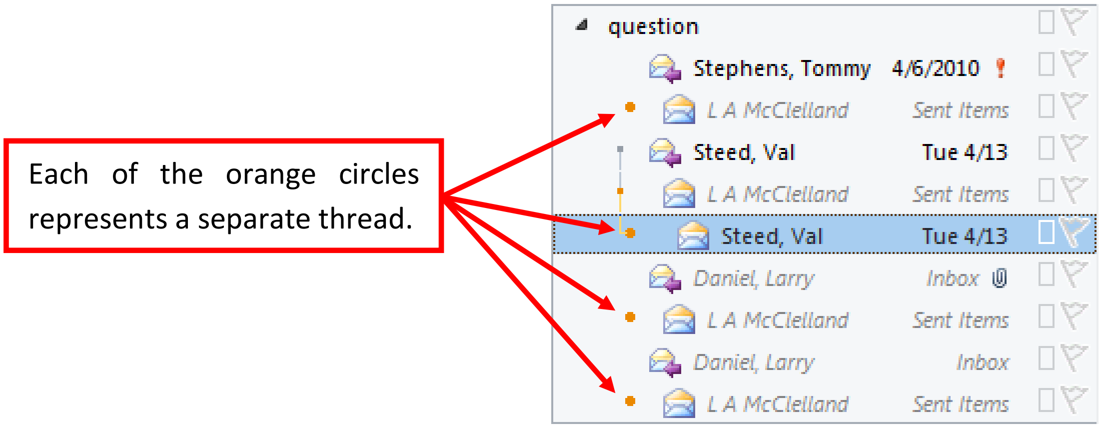


Figure 4 – A Single Conversation Split into Separate Threads

To view messages in Conversations, the Message List *must* be arranged in date order. To enable Conversations, select **View, Conversations**, and then check **Show Messages in Conversations**, as shown in **Figure 5**.

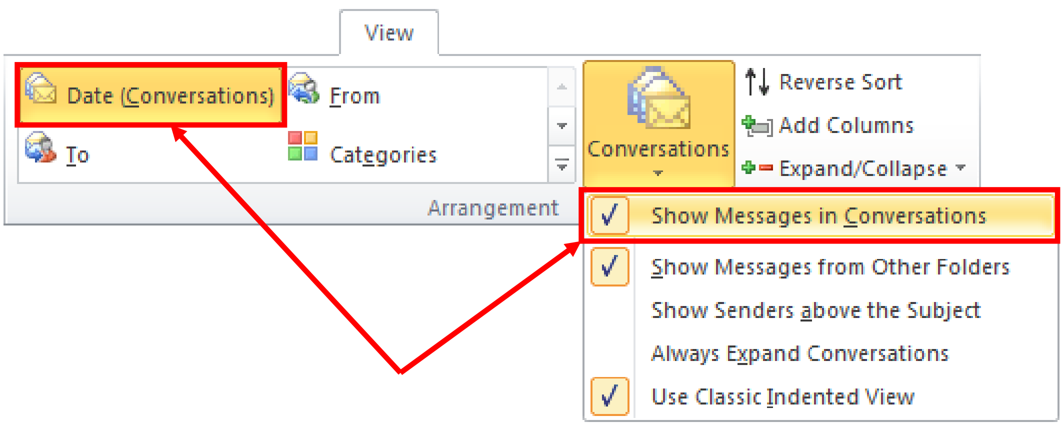


Figure 5 – Enabling Conversation View in the Message List

ⓘ By design, Conversations are grouped by subject. Messages with the same subject are grouped in a Conversation, even if the messages are unrelated. This may cause problems for some users who send or receive messages with commonly used subjects.

Ignoring a Conversation

Users can keep unwanted conversations out of their Inbox by using the **Ignore Conversation** command, which moves all received and future messages of selected conversations to the Deleted Items folder. Messages stored in Sent Items are not moved. This functionality improves user productivity by acting as a gatekeeper to the Inbox, sending unwanted messages directly to Deleted Items without blocking senders or creating specialized rules.

To ignore a conversation:

1. In the Message List, click on any message in the conversation to be ignored and then select **Home, Ignore**, as shown in **Figure 6**. Click **Ignore Conversation** to confirm the action.

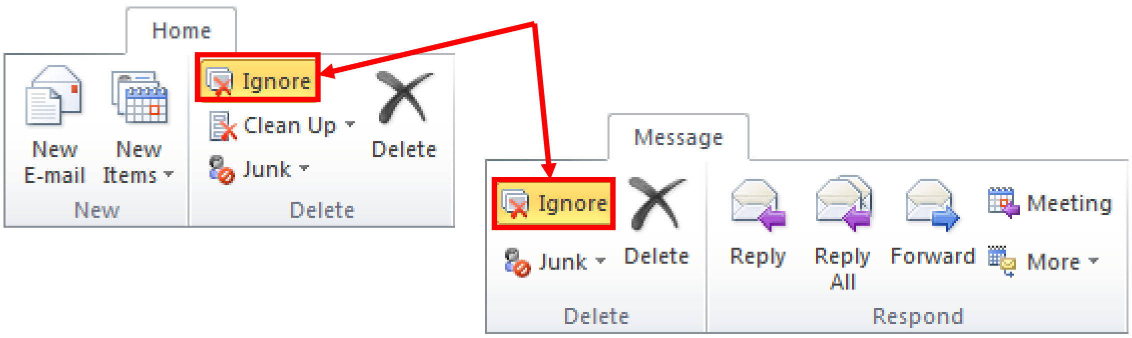


Figure 6 – Choosing to Ignore a Conversation

2. If a message related to a conversation to be ignored is open, select **Message, Ignore**, also shown in **Figure 6**. Click **Ignore Conversation** to confirm the action.

To stop ignoring a conversation:

1. In the Deleted Items folder, select the conversation or any message within the conversation to be recovered.

2. Click Home, Ignore. Click **Stop Ignoring Conversation** to confirm the action. The conversation will be moved back to the Inbox, and future messages will be delivered.

> ⓘ An ignored conversation can only be recovered if it is still available in the Deleted Items folder.

Cleaning Up Conversations

Users can reduce the size of a Conversation with the Clean Up command. It moves all of the older, redundant messages in a conversation to a specified folder. In default, items are moved to Deleted Items, but users may specify a different folder by selecting **File, Options, Mail, Conversation Clean Up**. Individual conversations or all conversations within a folder or set of folders can be cleaned up with a single command.

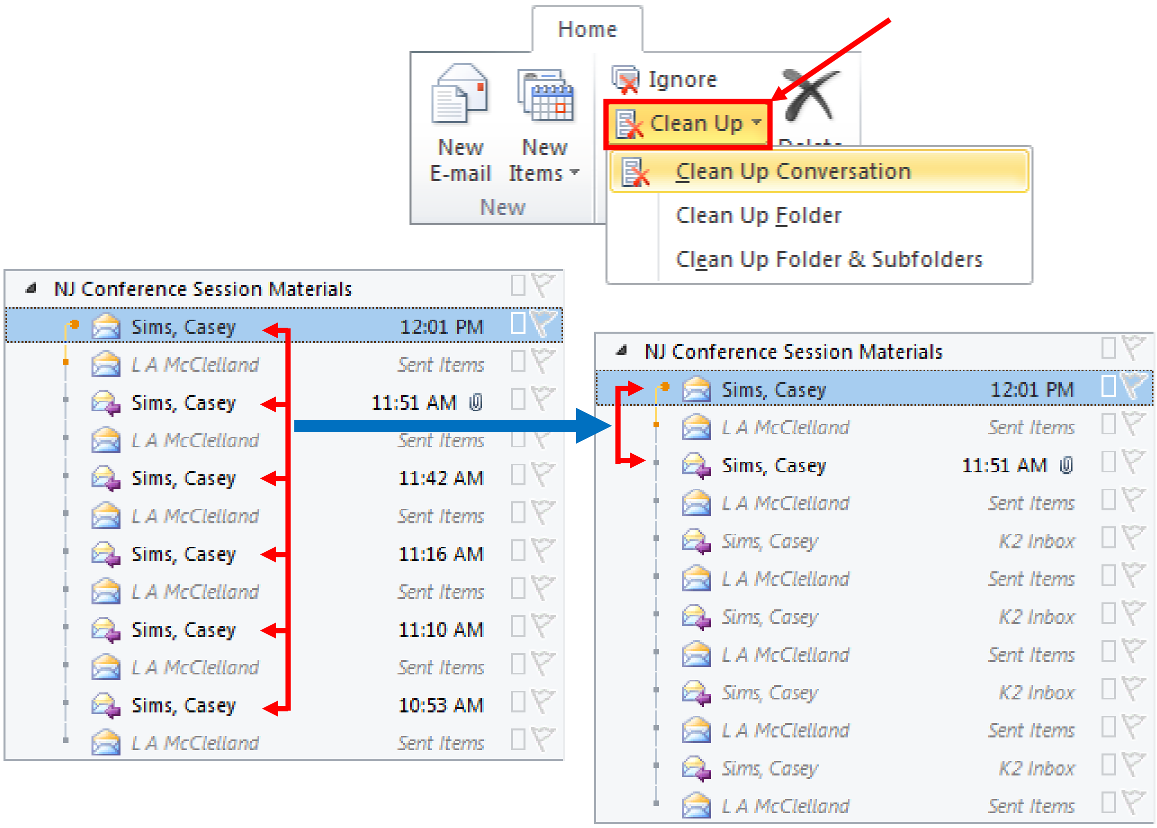


Figure 7 – Cleaning Up a Conversation

To clean up a conversation, select the conversation in the Message List and then click **Home, Clean Up, Clean Up Conversation**, as shown in **Figure 7**. Redundant messages in the Conversation are moved to the Deleted Items folder. Clean Up always keeps the most recent message of any thread in the Inbox, along with messages in the Conversation that are flagged, categorized, or have attachments. Note how six messages in the conversation in **Figure 7** are reduced to two messages, while maintaining the thread map of the entire conversation. Clean Up frees up space in the Inbox without losing information by deleting older, redundant messages. To undo a clean-up operation, find the conversation in Deleted Items and drag it back to the Inbox.

Acting on Conversations

The Conversation view is designed to reduce Inbox clutter and improve user productivity by grouping e-mail messages into threaded conversations by subject. Based on research conducted by Microsoft, users can expect a 40% reduction in Inbox items. User productivity can be improved by acting on an entire conversation rather than individual messages. As a unit, a conversation can be deleted, moved, categorized, or marked as read. Once a conversation is categorized, all new messages arriving in that conversation are automatically categorized. Working on a group of messages rather than on individual messages saves users considerable time. Based on internal research, Microsoft estimates that the time users spend in the Inbox will be reduced by up to 46%. Using the Conversations view, users can expect to:

- Reduce the amount of visual information in the Inbox by collapsing conversations into single items
- See entire conversations including related messages in Sent Items or filed in other folders
- Better understand who replied to whom when reading lengthy conversations
- Speed up e-mail activities by acting on Conversations rather than individual messages
- Quickly hide annoying messages by using Ignore
- Trim down the size of the Inbox without losing information by using Clean Up to remove older, redundant messages

Quick Steps (2010 only)

Repetitive, multistep procedures can be converted to single clicks with Quick Steps. For example, if users initiate messages to their managers frequently, the conventional process requires opening and addressing a new message before composing the message itself. A custom Quick Step can eliminate the first two steps in the process. Quick Steps are executed from the **Quick Steps** gallery on the **Home** tab, as shown in **Figure 8**.

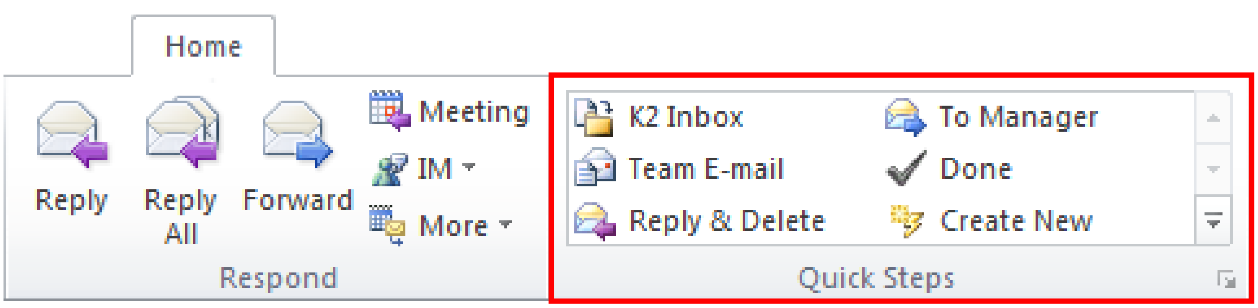


Figure 8 – Executing Quick Steps from the Home Tab

Outlook has six preconfigured Quick Steps, identified in the following table, that can be customized or renamed to suit users' needs.

Quick Step	Action
Move to:	Moves the selected message to a mail folder specified by a user and marks the message as read.
To Manager	Forwards the message to a user's manager.
Team E-mail	Forwards the message to others in the team.
Done	Moves the message to a specified mail folder, marks the message complete, and then marks it as read.
Reply & Delete	Opens a reply to the selected message, and then deletes the original message.
Create New	Creates a new Quick Step to execute any sequence of commands.

The first time a user executes a Quick Step, Outlook prompts the user to specify any required details and rename the Quick Step if desired, as shown in **Figure 9**.

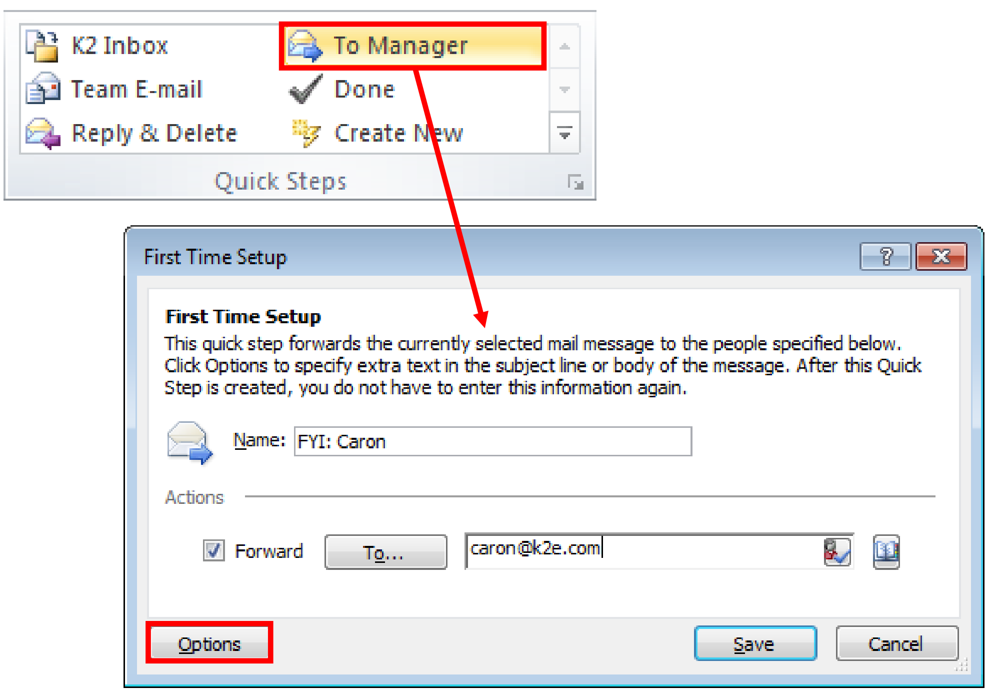


Figure 9 – Customizing a Quick Step on First Use

To add additional actions or to customize the Quick Step beyond the simple customizations illustrated, click **Options** to open the **Edit Quick Step** dialog box, as shown in **Figure 10**. To access all available options, click the **Show Options** link. In this case, notice that the subject, flag, and importance can be set along with a custom text message and a keyboard shortcut. More importantly, additional actions can be added to the Quick Step so that multistep processes can be accomplished with a single click.

To edit an existing Quick Step, click the drop-down arrow in the lower right-hand corner of the **Quick Step** gallery and select **Manage Quick Steps**.

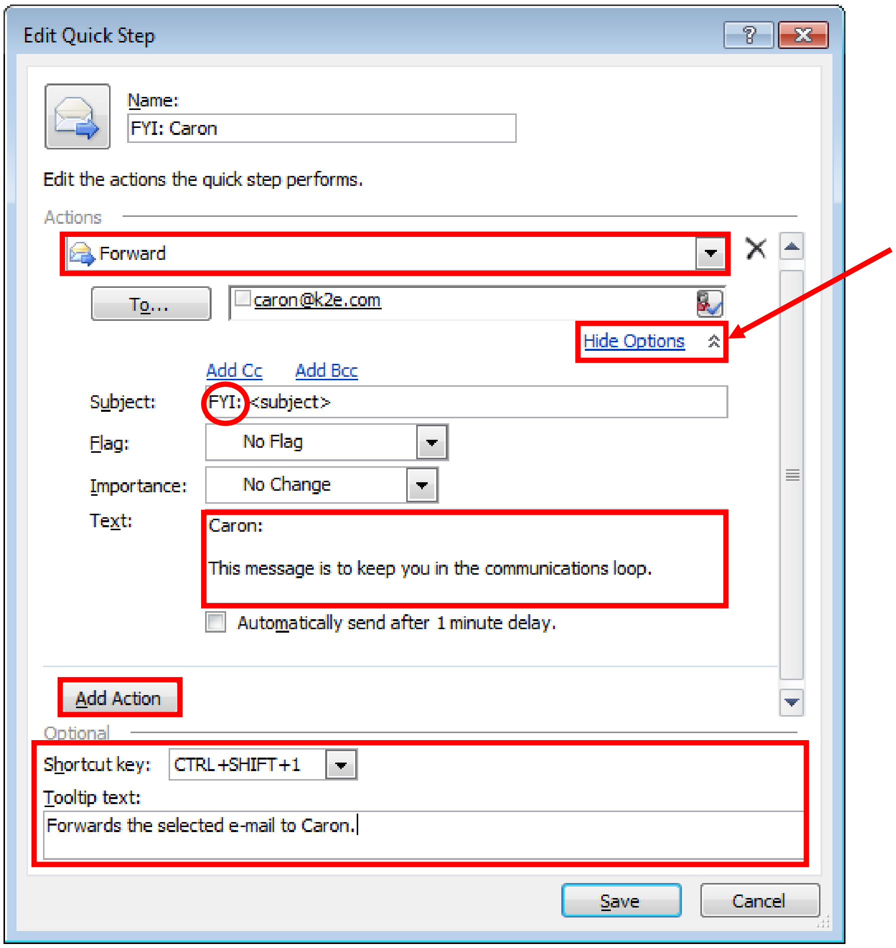


Figure 10 – Adding More Complex Customizations to a Quick Step

Instant Search (2010 only)

Outlook 2007 introduced Instant Search but Outlook 2010 makes it significantly easier and more intuitive for users to narrow their search results by adding search criteria. Whenever users click in the **Search** box at the top of the Message List, the **Search Tools** contextual tab is displayed, as shown in **Figure 11**. Users can select from a wide variety of criteria – From, Subject, Has Attachments, etc. – and can select from a list of locations to search – Current Folder, All Subfolders, All Mail Items, or All Outlook Items.

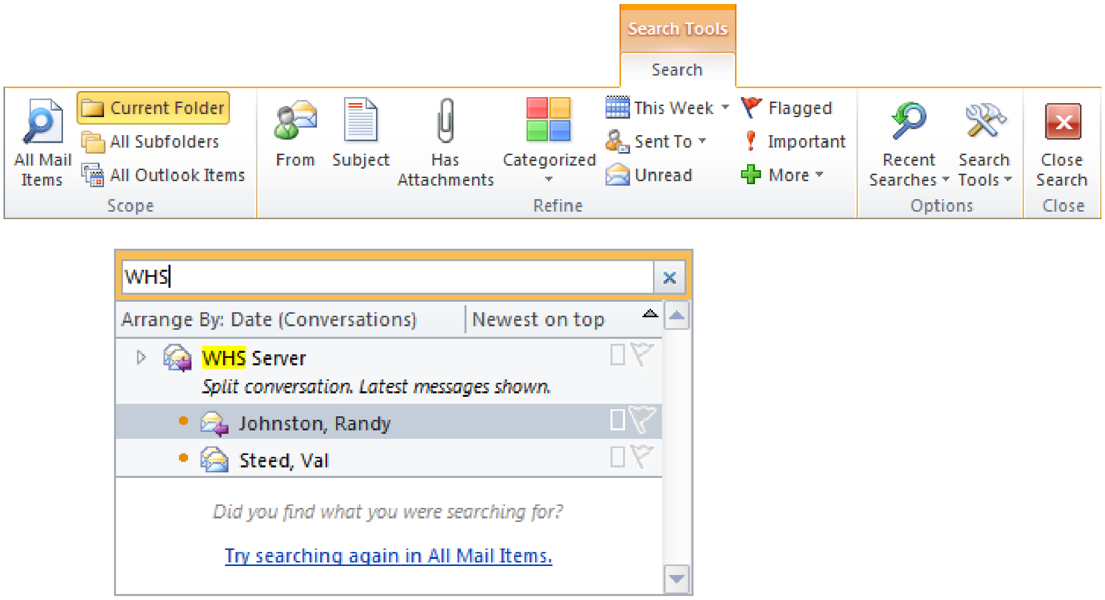


Figure 11 – Search Tools Contextual Tab

Instant Search is available in all Outlook folders – Mail, Calendar, Contacts, Tasks, Notes, or the Journal. Look for the **Search** box at the top of the main application window in folders other than Mail, or press **CTRL + E** to access Instant Search from any folder location. Note that search field criteria are specific to the type of folder being searched. If the desired criteria are not exposed on the Search Tools contextual tab, click **More** for a complete list of search fields. The criteria for the ten most recent searches are maintained on the **Recent Searches** drop-down list, as shown in **Figure 12**.

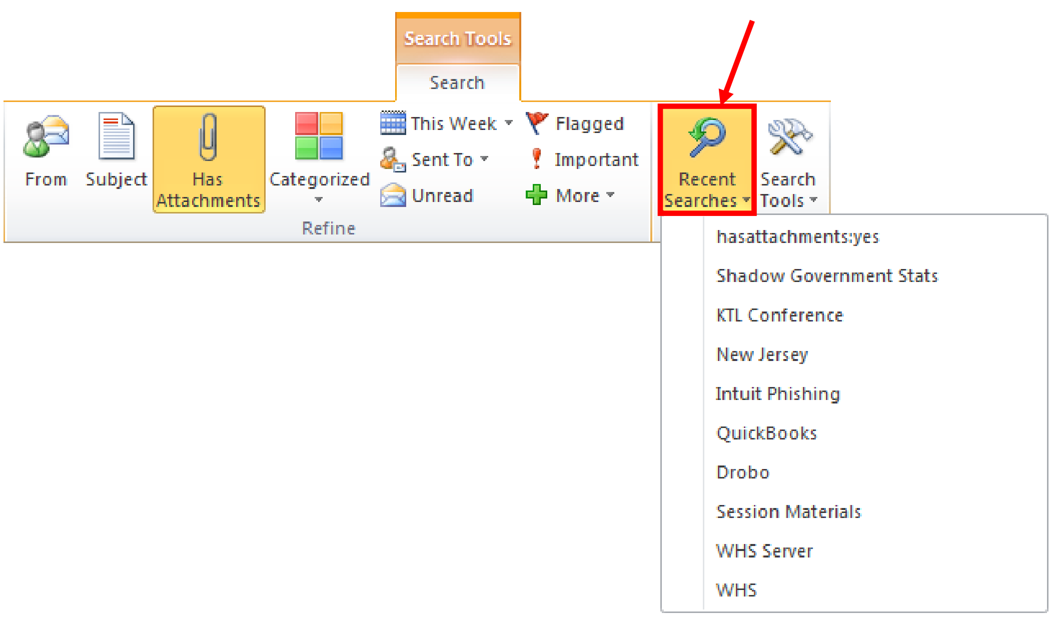


Figure 12 – Ten Most Recent Searches are Maintained for Easy Reuse

Outlook People Pane (2010 only)

The new Outlook Social Connector connects users to social and business networks that they frequent. Users can connect to SharePoint, Windows Live, and popular third-party sites, such as Facebook, LinkedIn, or MySpace. Users can view the profiles and updates of existing friends and add new connections without leaving Outlook. Connecting Outlook to a social network requires a connector published by a third-party network or Microsoft for SharePoint and Windows Live.

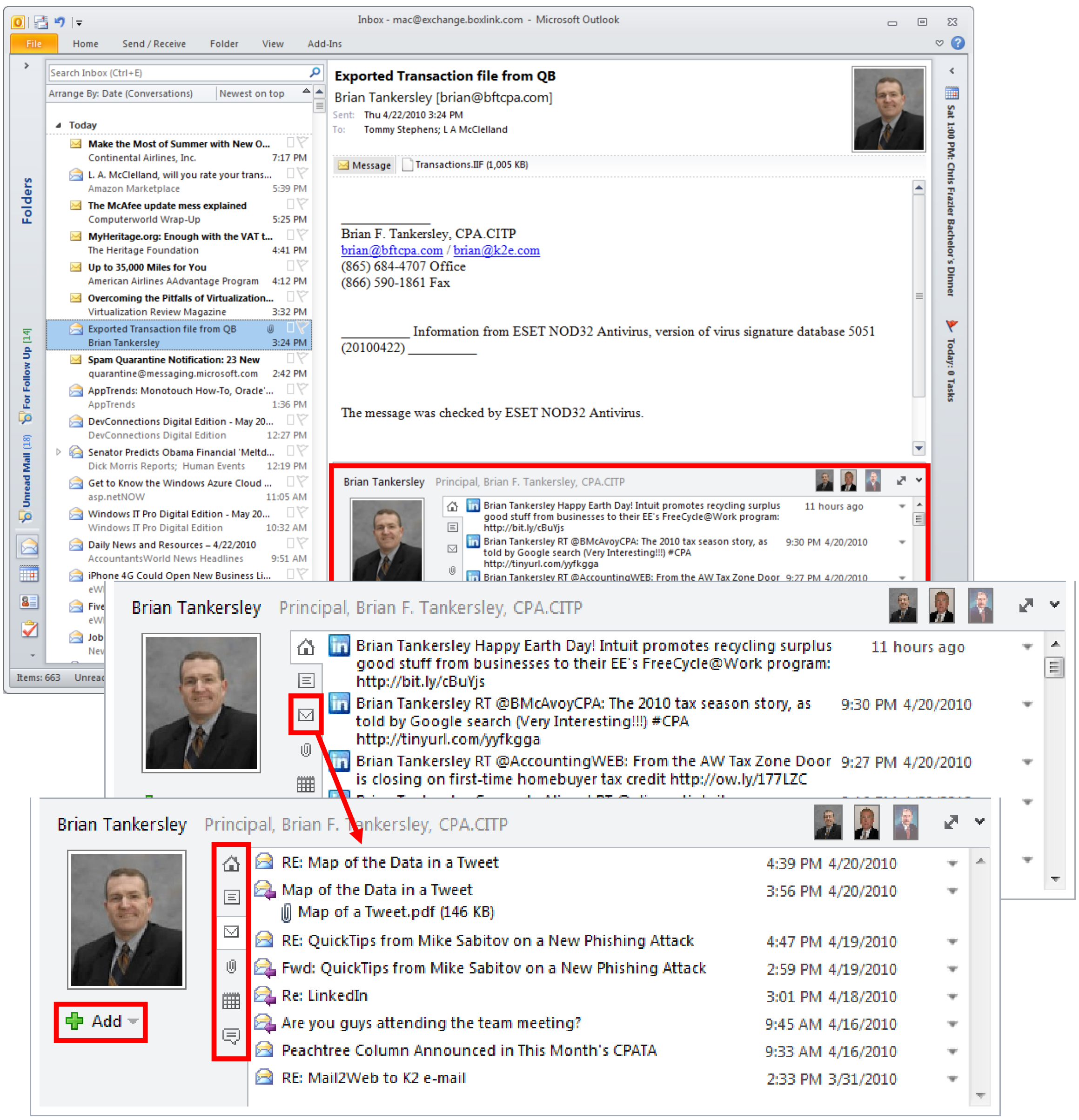


Figure 13 – Outlook People Pane

With Outlook Social Connector, users can:

- Synchronize their contact data into Outlook and obtain information about their friends and colleagues.
- See status updates from various networks and view recently posted files or view shared photos.
- Connect to SharePoint Server 2010 social data and receive updates from their workplace, such as newly posted or tagged documents, or recent site activity.
- Easily track the communication history of correspondents by viewing related Outlook content, such as recent e-mail conversations, meetings, or shared document, as shown in **Figure 13**.

Outlook Today

Outlook Today is the home page of Outlook, a web-based dashboard interface to a user's messages, calendar, and tasks. To open the dashboard, click on the Outlook Today button located on the Advanced toolbar, as shown in **Figure 14**.

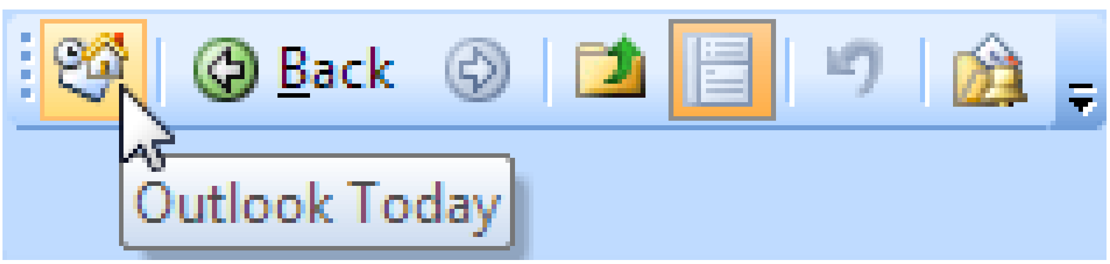


Figure 14 – Access Outlook Today from the Advanced Toolbar

The dashboard, shown in **Figure 15** flanked by a docked Navigation Pane on the left and a docked To-Do Bar on the right, is customizable and can be configured to open automatically when Outlook is opened.

The dashboard shown in **Figure 15** displays the standard two-column look with a user's calendar on the left and message folders and task list on the right. Each of the section headings – Calendar, Messages, and Tasks – are clickable links that take users directly to their calendar, inbox, and task list respectively.

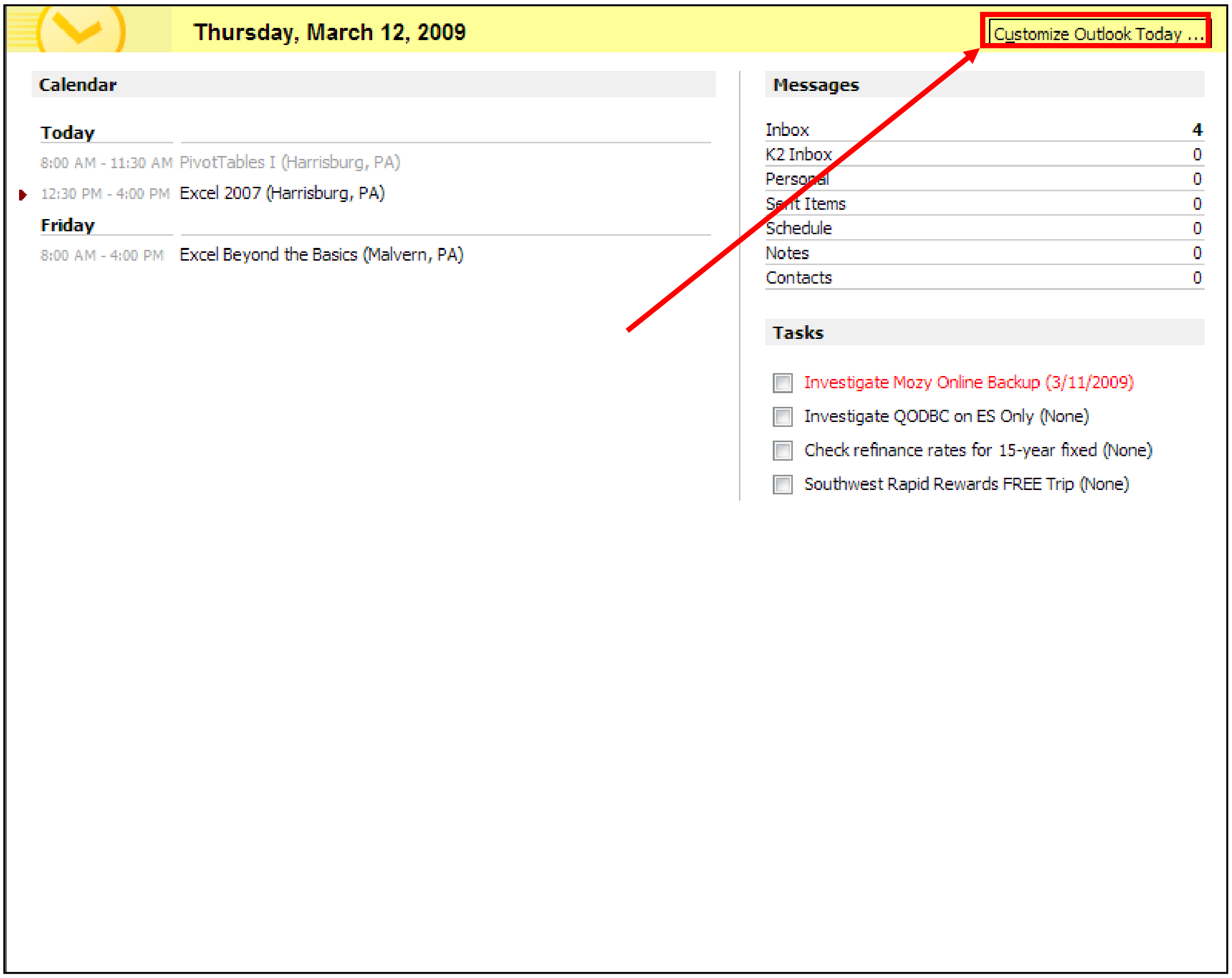


Figure 15 – Outlook Today Dashboard

Within each section are clickable links to individual calendar items, message folders, and tasks. This dashboard allows users to see all of their actionable items in a single, clickable user interface, similar in look, feel, and action to a web page.

To customize the dashboard, click on **Customize Outlook Today** in the upper right-hand corner of the display to open the Customize Outlook Today panel, as shown in **Figure 16**. The panel allows users to set startup options, choose folders to display and their display order, select tasks to display and their display order, and modify the look-and-feel style of the dashboard.

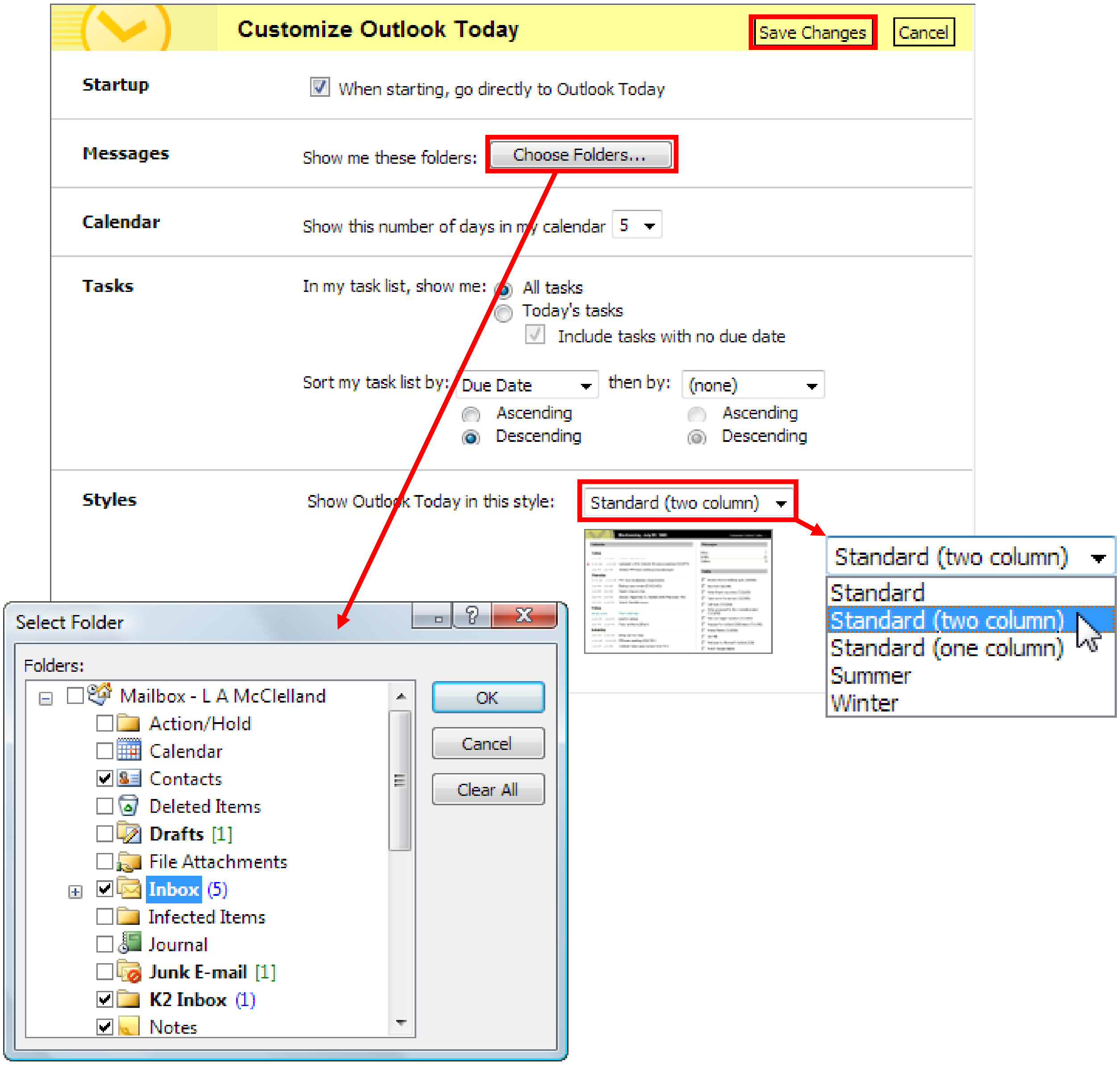


Figure 16 – Customizing Outlook Today

ⓘ Note that the folder list displayed in Outlook Today can include folders other than message folders. In fact, the list can include any folders, such as Contacts or Notes. Also note that the order of folder display can be altered from the default ascending alphabetic order. Simply remove all checks from the folder list and then click **OK**. Reopen the folder list and carefully check the folders to be displayed *in the order that the folders are to be displayed*. Click OK to complete the process.

Universal Drag-and-Drop

The interface of Microsoft Outlook allows users to drag-and-drop items to organize or create new items. Here are some of the ways that users can quickly and easily organize their communications, calendar and tasks:

1. Drag messages from the Inbox and drop them into other folders in the folder list to organize them.

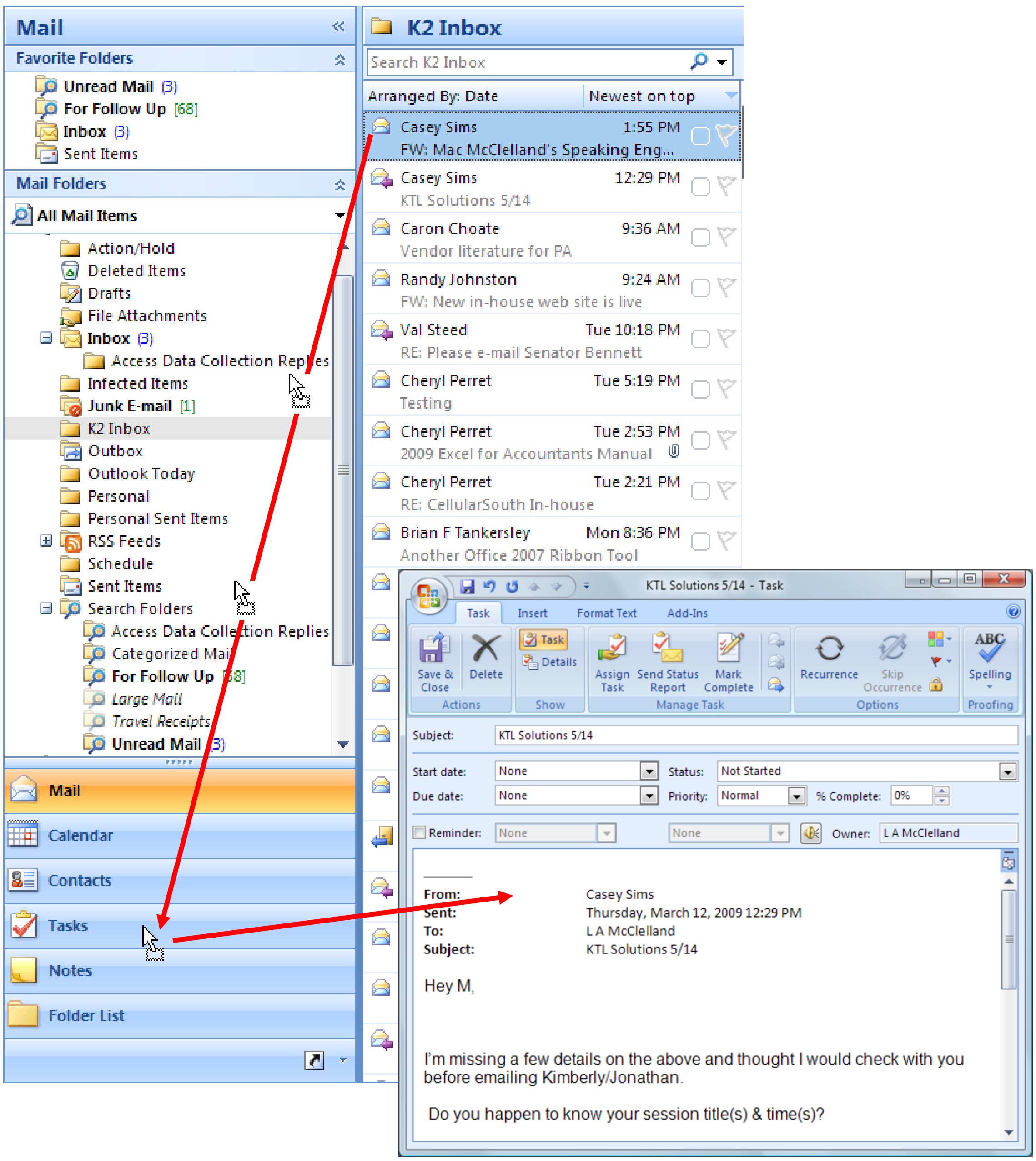


Figure 17 – Using Drag-and-Drop to Create a New Task from a Message

2. Drag messages to the Tasks button in the Navigation Pane to create new tasks, as shown in **Figure 17**. In default, the subject of the message becomes the title of the task, and the message body is contained in the task notes.

3. Drag messages to the Task List on the To-Do Bar. This flags the messages for follow up with a due date consistent with the date group into which the messages were dropped.

4. Drag messages and drop them into existing Tasks. The messages become embedded or attached items.

5. Drag messages to the Contacts button on the Navigation Pane to create new contacts from the sender information in the message. The message body is added to the Notes field of the contact.

6. Drag messages to the Calendar button on the Navigation Pane to create new calendar items. In default, the subject of the message becomes the title of the calendar item, and the message is contained in the calendar notes.

7. Drag messages to the appropriate dates on the thumbnail calendars in the To-Do Bar to create new calendar items. In default, the subject of the message becomes the title of the calendar item, and the message is contained in the calendar notes.

8. Drag contacts to the Mail button in the Navigation Pane to create a new message addressed to the contacts.

9. Drag tasks to the Calendar button on the Navigation Pane to create new calendar items. In default, the title of the task becomes the title of the calendar item, and the task detail is contained in the calendar notes.

10. Drag calendar items to the Mail button on the Navigation Pane to create new e-mail messages. In default, the title of the calendar item becomes the subject of the message, and the calendar detail is included in the message body.

11. Drag messages to the Notes button on the Navigation Pane to create new notes. In default, the message body becomes the note body.

The purpose of the preceding discussion is to make clear that the user interface in Microsoft Outlook supports universal drag-and-drop. Almost any Outlook item can be used to create another Outlook item quickly and easily using this process. This functionality eliminates the need to rekey information and dramatically improves user productivity.

Using Categories to Organize

Categories are a color-coding and tagging system to organize messages *within* folders and *across* multiple folders. Think of categories as *virtual* folders, similar in operation to labels in Gmail. With categories there is no need to create a complex folder structure. Messages and other Outlook items can be assigned to one or more categories, which allow users to access those items quickly and easily. Outlook comes with a number of predefined categories, but users can customize the list to meet their own needs. Each category is associated with a user-specified color so that messages and items can be visually identified with a category.

To assign a category to a message:

1. Right-click on the **Category Box** for the item of interest in the Message List and select the appropriate category. Alternatively, click on the **Categories** button on the Standard tool bar as shown in **Figure 18**.

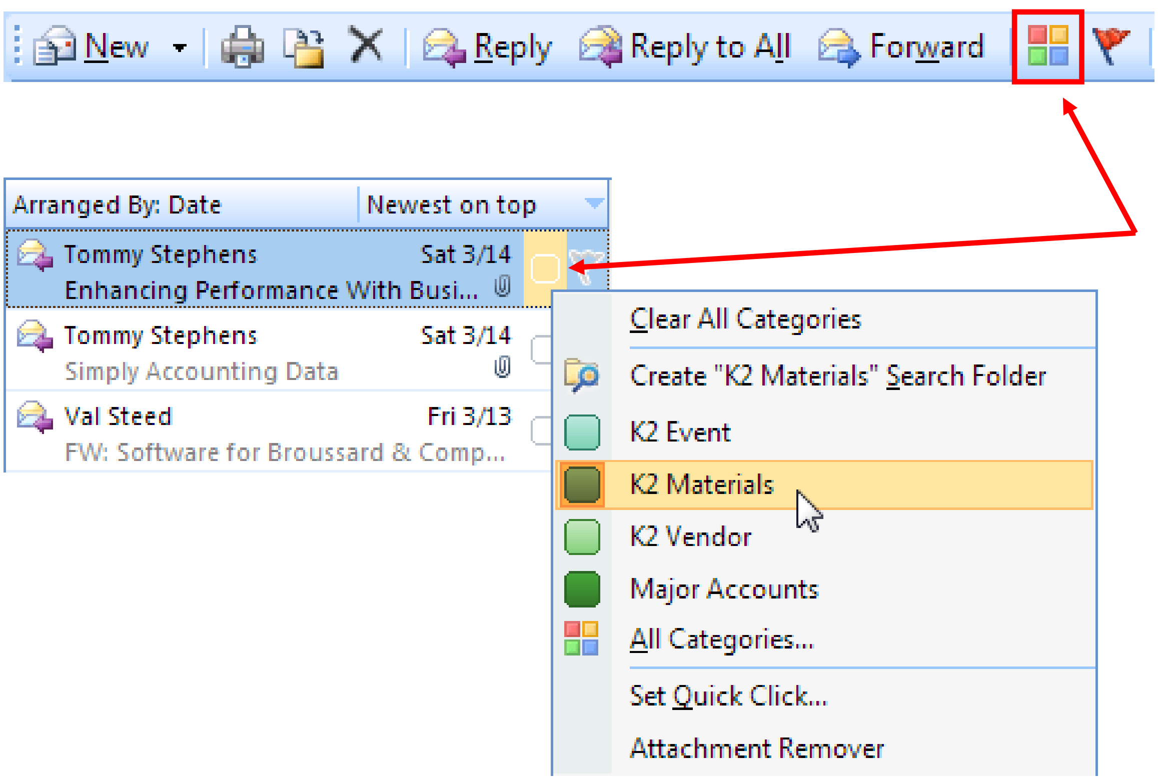


Figure 18 – Assigning a Category to a Message

Figure 19 illustrates the process and effect of assigning a category to an e-mail message. Note that the Category Box is now filled with the color assigned to the category, and the message header has been modified to include an identically colored bar with the name of the category assigned. This allows users to visually distinguish messages of one category from another quickly and easily.

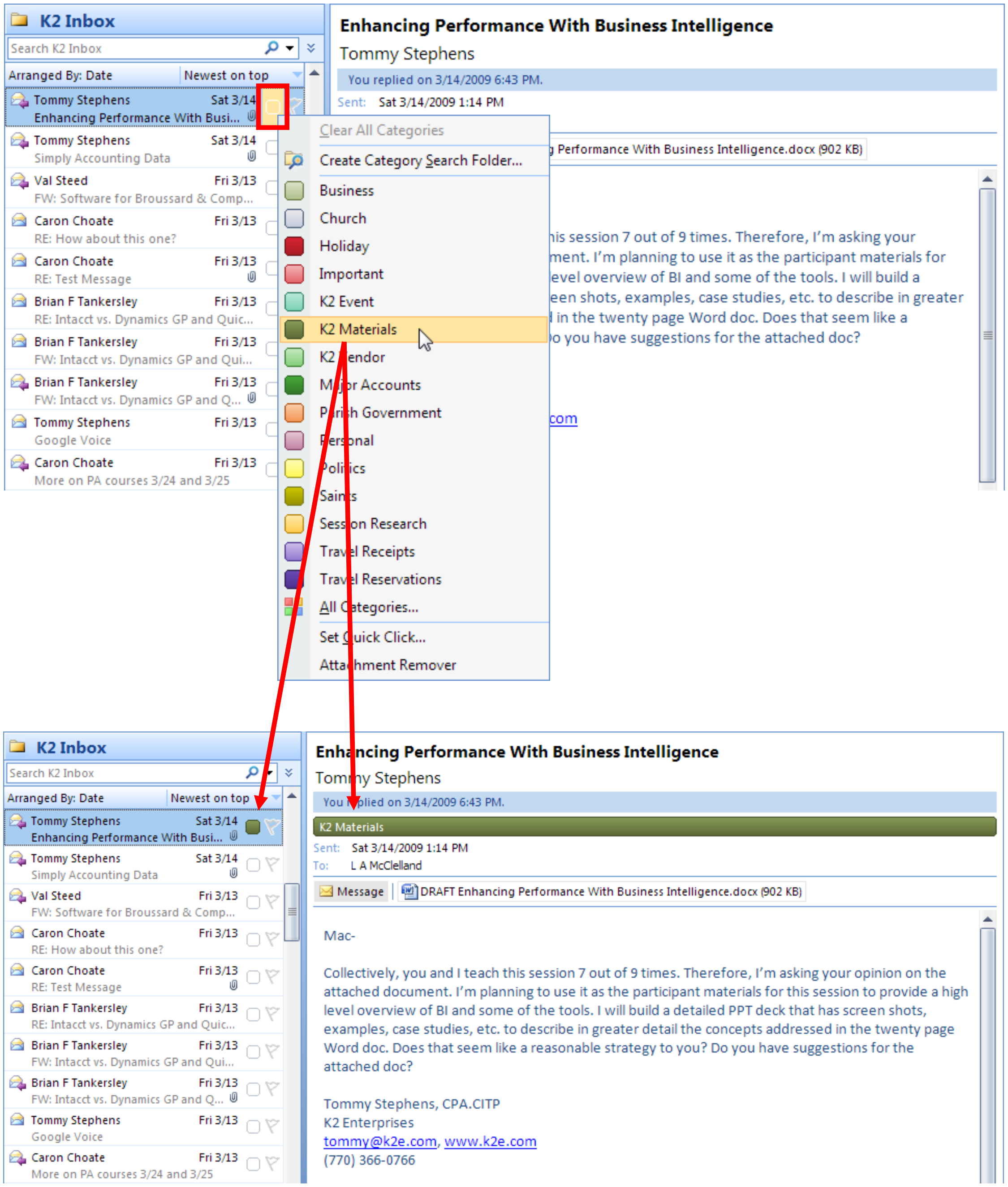


Figure 19 – Effect of Assigning a Category to a Message

To assign multiple categories to a message, repeat the process for assigning a single category for the requisite number of categories. Alternatively, click **All Categories**, near the bottom of the category list, and check the categories to be assigned to the message or other Outlook item, as shown **Figure 20**.

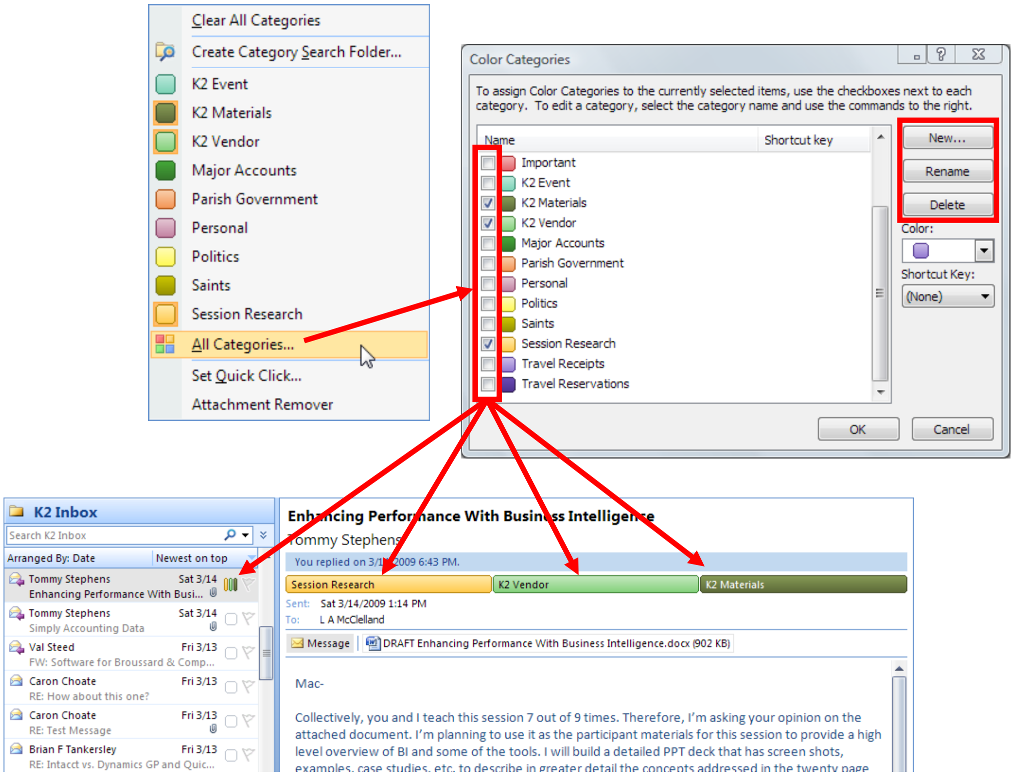


Figure 20 – Assigning Multiple Categories to a Message

Note that categories may be created, renamed, or deleted in the **Color Categories** dialog box. Follow along with your instructor as we create, rename, and delete several categories.

Earlier, categories were described as virtual folders that could be used to group messages with similar characteristics. To view the categories as a group, simply select one of the built-in search folders, **Categorized Mail**, from the folder list as shown in **Figure 21**.

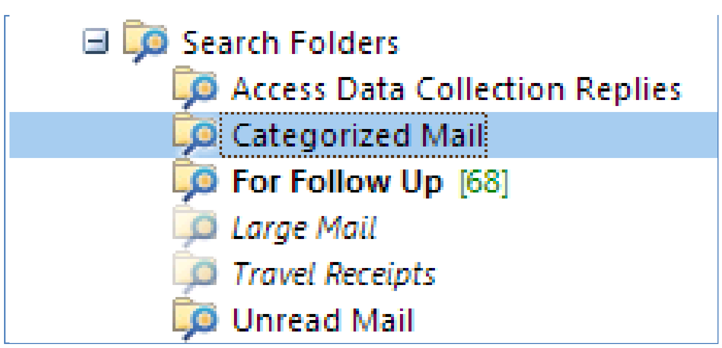


Figure 21 – View Messages in Categories as Virtual Folders

All mail that has been assigned one or more categories will be displayed in the message list within groups that can be expanded or collapsed to display the desired messages. Messages that have been assigned to more than one category will appear in each group to which it has been assigned. All categorized messages will appear in their respective groups, regardless of the physical folders in which the messages reside. In other words, categories act as virtual folders, organizing messages across multiple physical folders to provide quick and easy access to messages with some common characteristics.

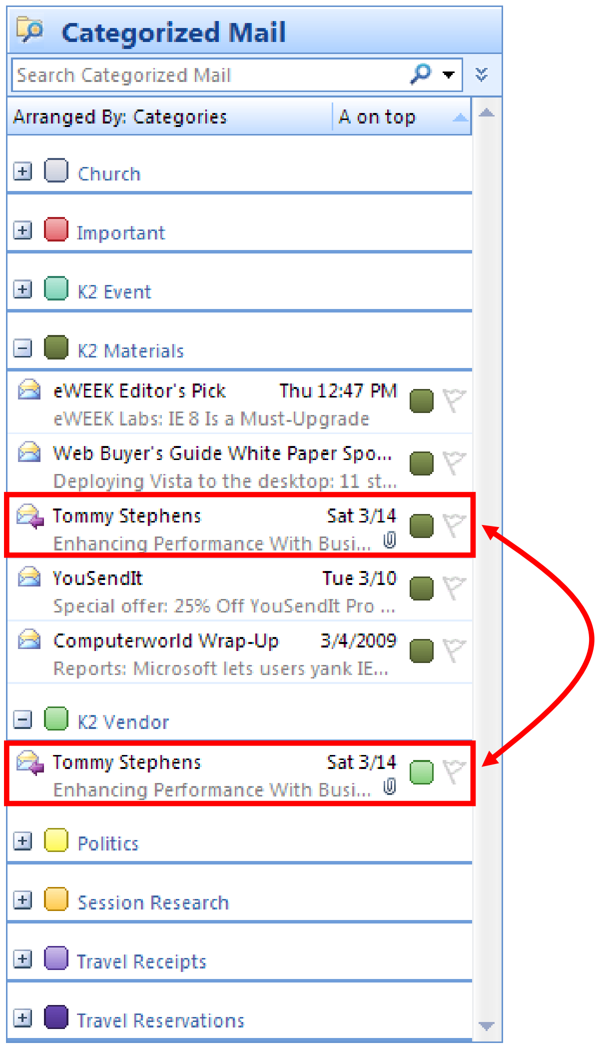


Figure 22 – E-mail Displayed in Groups by Category

Figure 22 shows e-mail grouped by category in the Message List as it is displayed by the built-in Search folder, Categorized Mail. Note how the same message appears in two categories. This functionality makes it easy for users to organize messages for later access, even when a single message fits logically into two or more categories.

Using Folders and Categories Together

Folders and categories should be thought of as complementary functionality that can be used together for more effective organization. For example, folders could be used to provide a simple high-level organization structure, while categories could be used to provide additional levels of detail. While folders provide an intuitive organizational structure for most users, each message can only be stored in a single folder unless multiple copies of a message are made. Further, dealing with a complex folder structure reduces productivity. Categories overcome these disadvantages by allowing messages to be logically associated without the necessity of creating or maintaining a complex folder structure.

Categories are best used to organize work. They provide a visual cue to easily and quickly determine from or to whom messages were received or sent, the project or team with which they were associated, whether they're personal or business-related, or whether they are identified with any other important characteristic. They are especially useful for messages that require grouping across several characteristics. For example, a single message concerning a meeting with a key client may need to be organized by who requested the meeting, the type of engagement, and the staff member in charge. In this case, three categories could be assigned to the message without requiring a complex folder structure.

Using Rules with Folders and Categories

Generally, rules are used to perform some action on messages automatically as they are sent or received. For example, rules can be used to move messages from someone or containing specific words in the subject to a folder, or they can be used to assign messages to a category. Rules automate what would otherwise be manual processes and are synergistic when used in conjunction with folders and categories. In other words, rules can be used to automate the process of organizing messages.

To create a rule to move messages from other staff members of the same organization to a Company Inbox:

1. Create a new first-level folder named Company Inbox in the folder list. (This step is not absolutely necessary because users can create new folders as part of the rule building process.)

2. From the menu, select **Tools, Rules and Alerts** to open the **Rules and Alerts** dialog box.

3. Click **New Rule** on the **E-mail Rules** tab to start the **Rules Wizard**.

4. Select **Move messages from someone to a folder** in the **Stay Organized** section of the **Step 1** selection box.

5. In the **Step 2** section box, click on the **people or distribution list** link to open the **Rule Address** dialog box. Select the senders or distribution list to which the rule is to apply and click **OK**.

6. Then, click the **specified folder** link and select the **Company Inbox** folder in the **Rules and Alerts** dialog box. Click **OK**. Note that folders can be created in this dialog.

7. Click **Next, Next, Next, Next**. In the **Finish rule setup pane**, give the rule a descriptive name, click **Finish**, and then click **OK** to complete the process, as shown in **Figure 23**.

In this simple rule, multiple senders were selected from the address book. If your organization has a large staff, selecting individual senders would be a cumbersome process. In these circumstances, the best course of action would be to start from a blank rule and move all messages with some specified text in the sender field to the Company Inbox. The specified text would be the domain name of the organization, such as *k2e.com*, which would catch all internal messages. Follow along with your instructor as we explore starting from a blank rule.

> If a user has multiple rules, the rules execute in order from the top of the list to the bottom as displayed in the Rules and Alerts dialog box. Keep in mind that the order in which the rules execute affect the effectiveness of the process. If rules are not working properly, use the arrows above the rules list to move rules up and down in the list to affect the order of execution. Note also that a rule can be enabled or disabled using the checkbox to the left of a rule name.

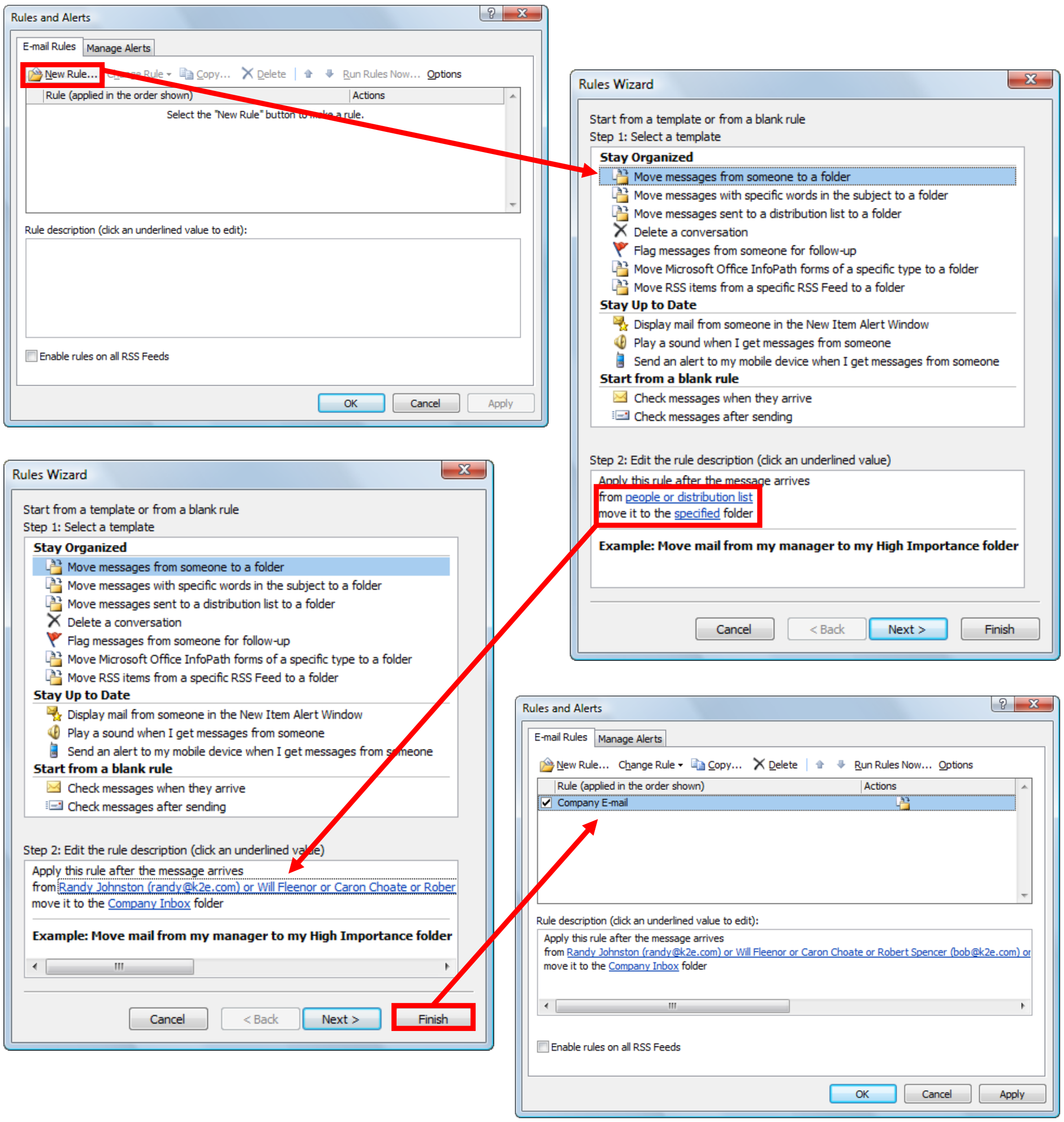


Figure 23 – Creating a Rule to Move Messages to a Company Inbox

Contacts and Address Books

The Address Book is a container for working with Contacts folders and other address lists, such as the Global Address List (GAL) if an organization uses Microsoft Exchange Server. In default, the Outlook Address Book, which is created automatically, contains all of the contacts in the main Contacts folder, the GAL, and any additional contacts folders that have been created by a user. The Address Book is opened each time a message is addressed by clicking the **To**, **Cc**, or **Bcc** buttons in a new message window, as shown in **Figure 24**.

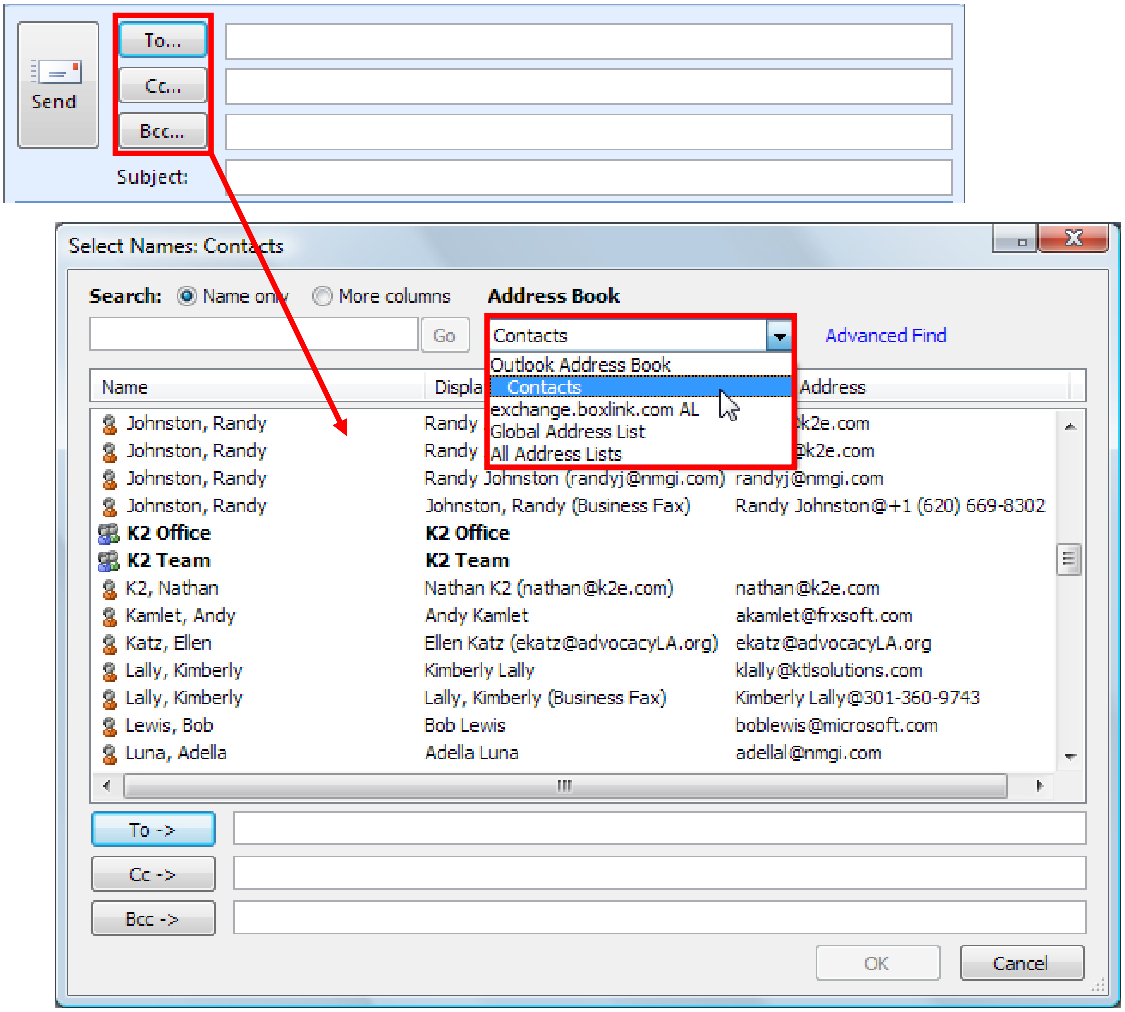


Figure 24 – Accessing the Address Book from a New Message

The Address Book displays a contact's name, display name and e-mail address or fax number. Distribution lists are displayed in boldface. Note the drop-down list used to display specific address lists. Also note that each contact may have multiple address book entries, one for each e-mail address or fax number contained in the contact record.

The Address Book presents two of the most common frustrations experienced by Outlook users: 1) a user's desired contact list is not displayed in default, requiring a user to select the appropriate list each and every time the Address Book is used, and 2) the contact list is displayed in ascending alphabetical order by first name rather than last name.

To change the default address list:

1. From the menu, select **Tools, Address Book** to open the Address Book dialog box.

2. In the **Address Book** dialog box, select **Tools, Options** from the menu to open the Addressing dialog box.

3. In the **Addressing** dialog box, select the desired address list from the **Show this address list first** drop-down menu, as shown in **Figure 25**.

4. Click **OK** and then close the Address Book.

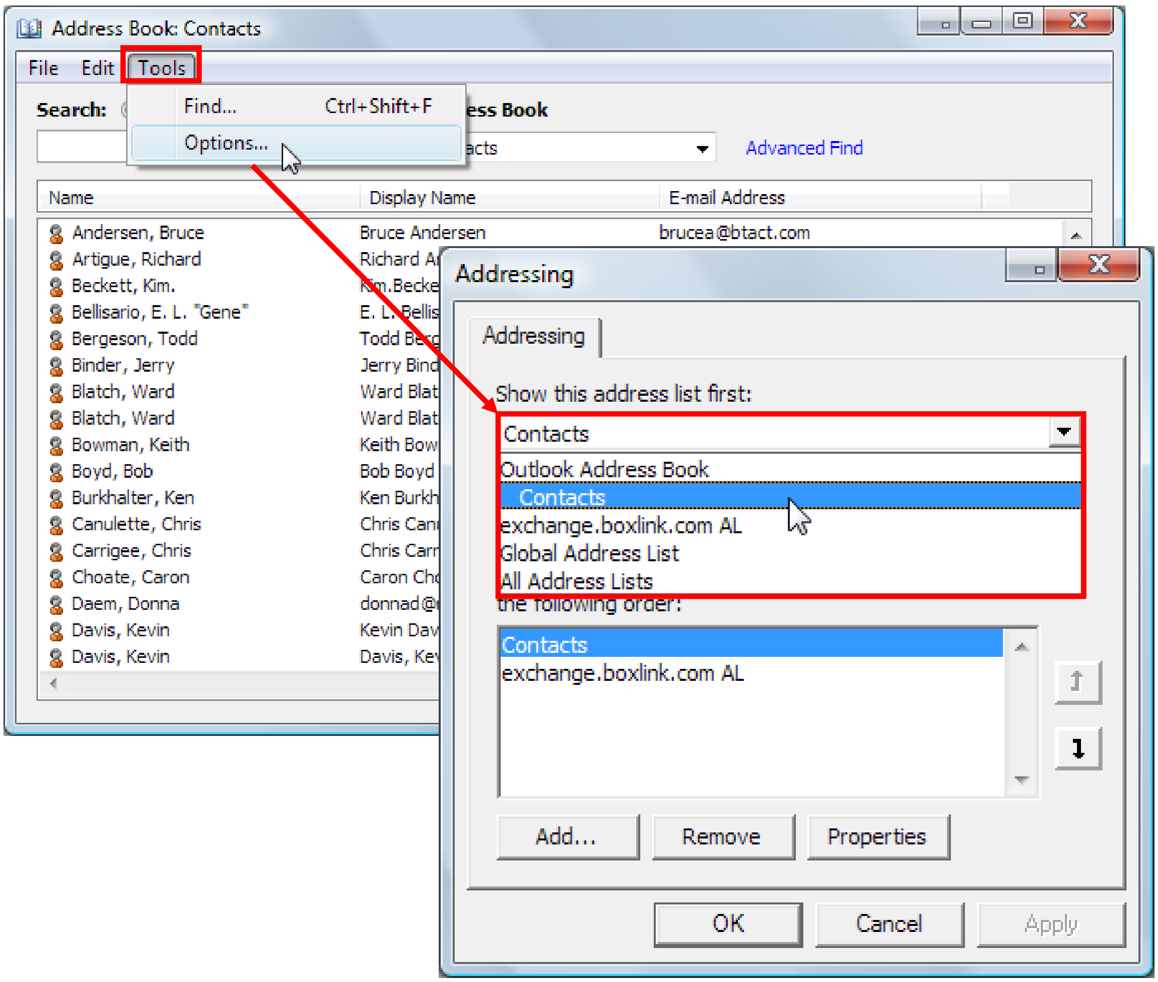


Figure 25 – Selecting the Default Address List in the Address Book

To change the display order of contacts in the Address Book:

1. From the menu, select **Tools, Account Settings** to open the Account Settings dialog box.

2. In the **Account Settings** dialog box, select the **Address Books** tab.

3. Select the address book for which the display order is to be changed and click **Change** to open the **Microsoft Office Outlook Address Book** dialog box.

4. Select **File As (Smith, John)** as the **Show names by** display order, as shown in **Figure 26**.

5. Click **Close**, **Close** to complete the process.

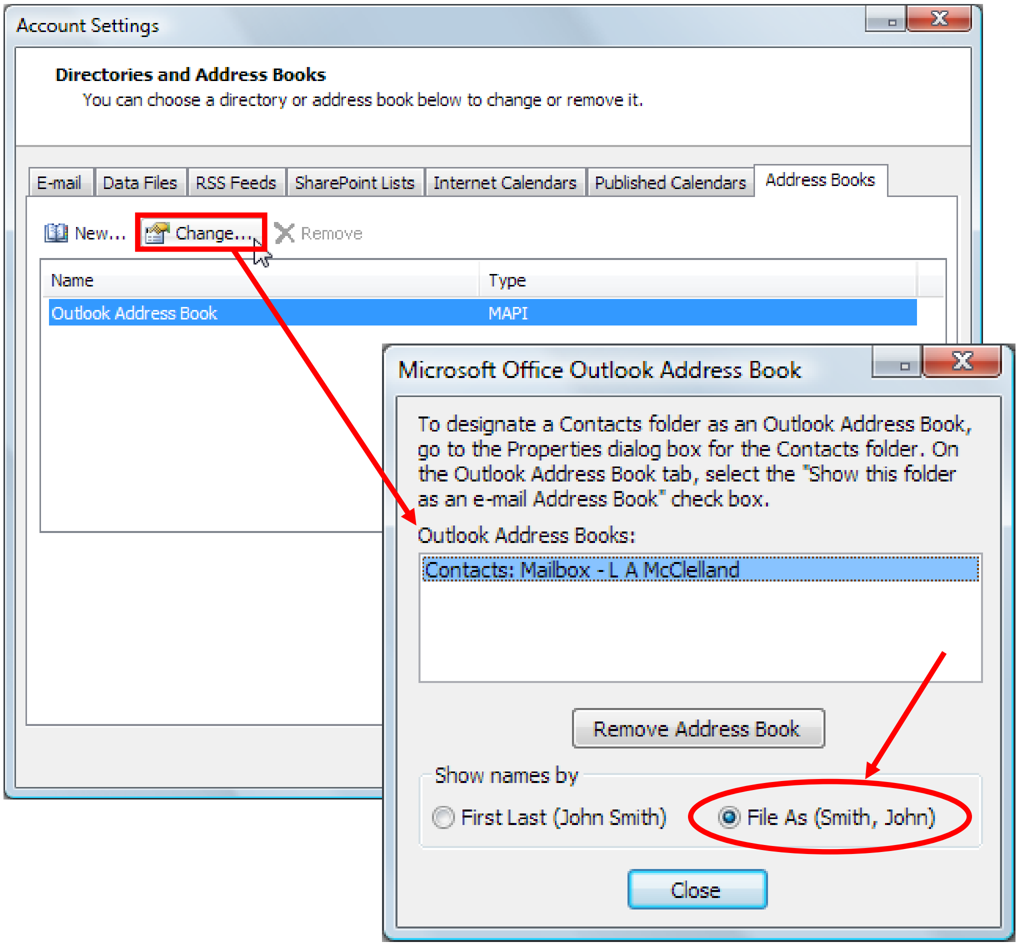


Figure 26 – Changing the Name Display Order in the Address Book

Note that the **File As** display order is last name, first name in default. If a user has changed the File As setting from the default for any contacts, the custom settings will persist in the Address Book.

The File As order can be modified in the general settings of each individual contact record. The global File As order can also be modified. From the main menu, select **Tools, Options** and then click **Contact Options** on the **Preferences** tab.

Sharing Contacts with Others

There are three primary methods of sharing contacts with other users: 1) attaching contacts or business cards to a message and sending it to the intended recipient, 2) sharing via Exchange, or 3) exporting contacts to a file that can be imported by another.

Attaching a contact to an outgoing message is a simple process. Click **Attach Item** on the **Message** tab, select the **Contacts** folder in the **Look in** box, and then select the contact or contacts to be attached, as shown in **Figure 27**. Use **CTRL + Click** to select multiple contacts.

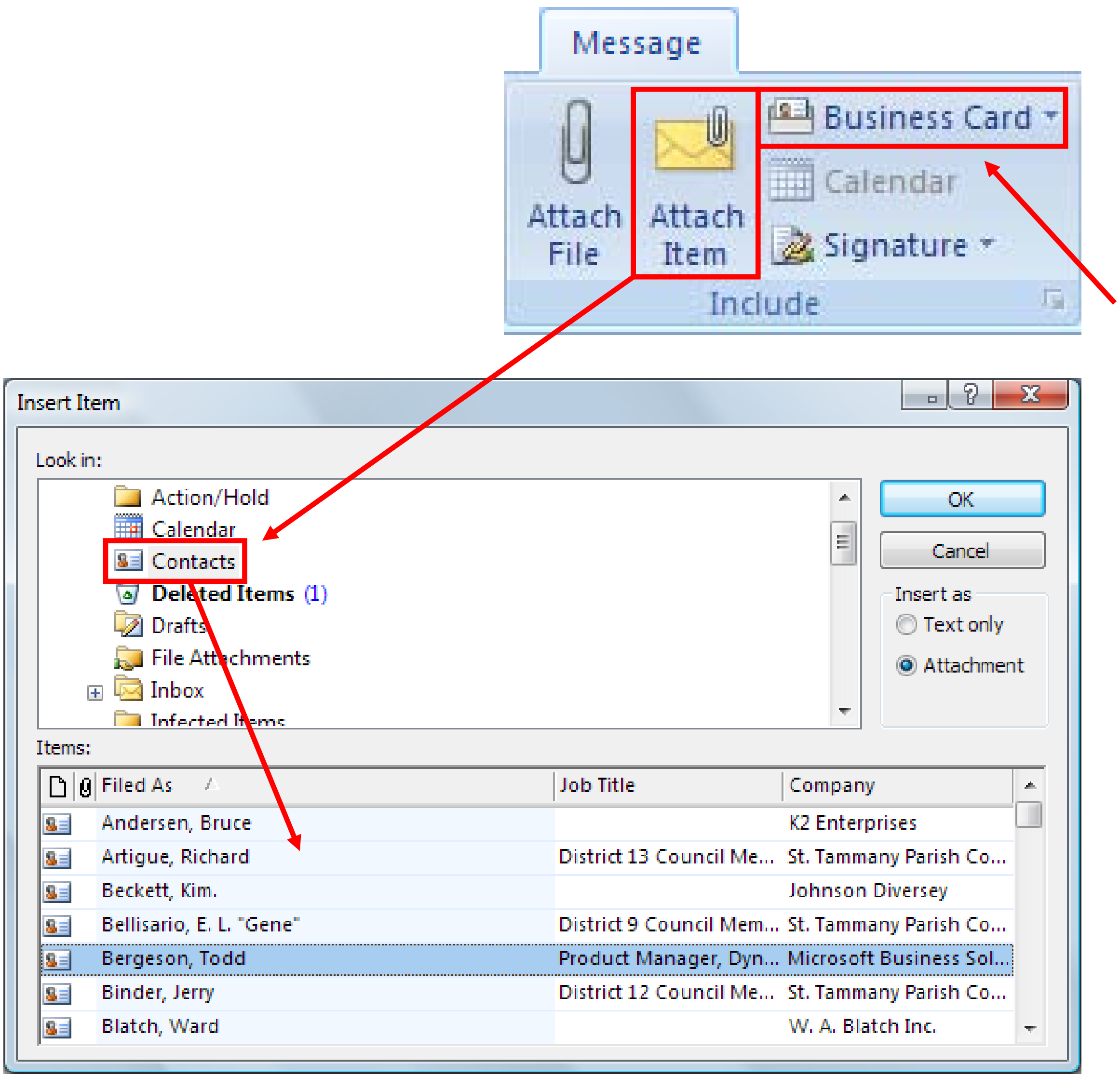


Figure 27 – Attaching Contacts to a Message

Alternatively, click **Business Card** on the **Message** tab and select **Other Business Cards**. While this process is normally used for attaching the business card of the sender, any contact can be attached as a business card. Note that this method attaches cards to messages as well as inserts cards in the body of messages. Again, use **CTRL + Click** to select multiple contacts.

Contacts can be sent to others directly from the Contacts folder. Select a single contact or multiple contacts using **CTRL + Click**, and then right-click to select **Send Full Contact**. Select the contact format, either **In Internet Format (vCard)** or **In Outlook Format**, to create an automated message for communicating the contacts to the intended recipient.

Recipients can add these attachments or business cards to their contacts by dragging the attachments or cards to their Contacts folder. If a contact with the same name exists, users will have the opportunity to update their existing contact or to create a new one.

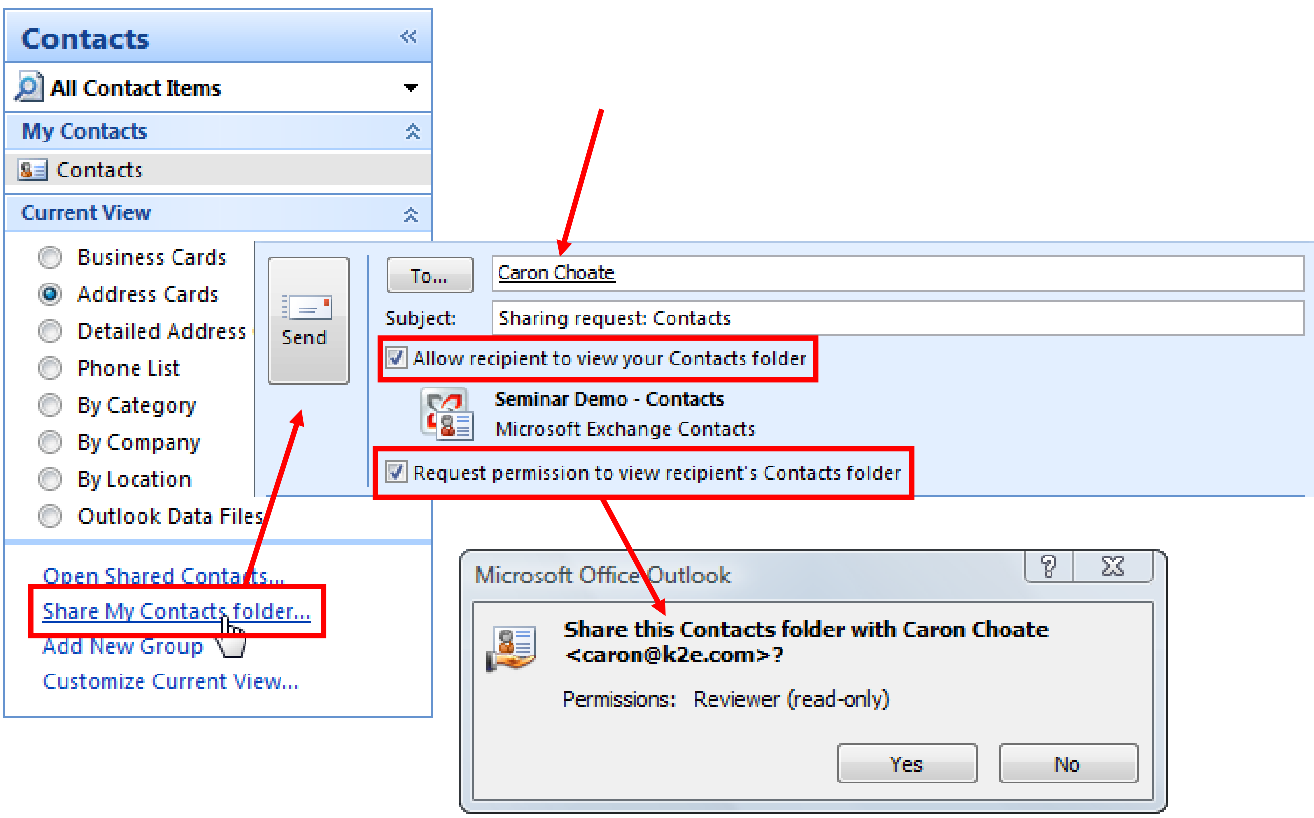


Figure 28 – Sharing Contacts in Exchange

In default, the recipient will be granted access to your Contacts folder with Reviewer (read-only) permissions. To change or remove permission levels for shared users, right-click on a shared folder and select **Change Sharing Permissions** from the context-sensitive menu, as shown in **Figure 29**. Select a user and then select the **Permission**

Level desired. Click **OK** to apply the change. To remove a user's access permissions, select the user and click **Remove**.

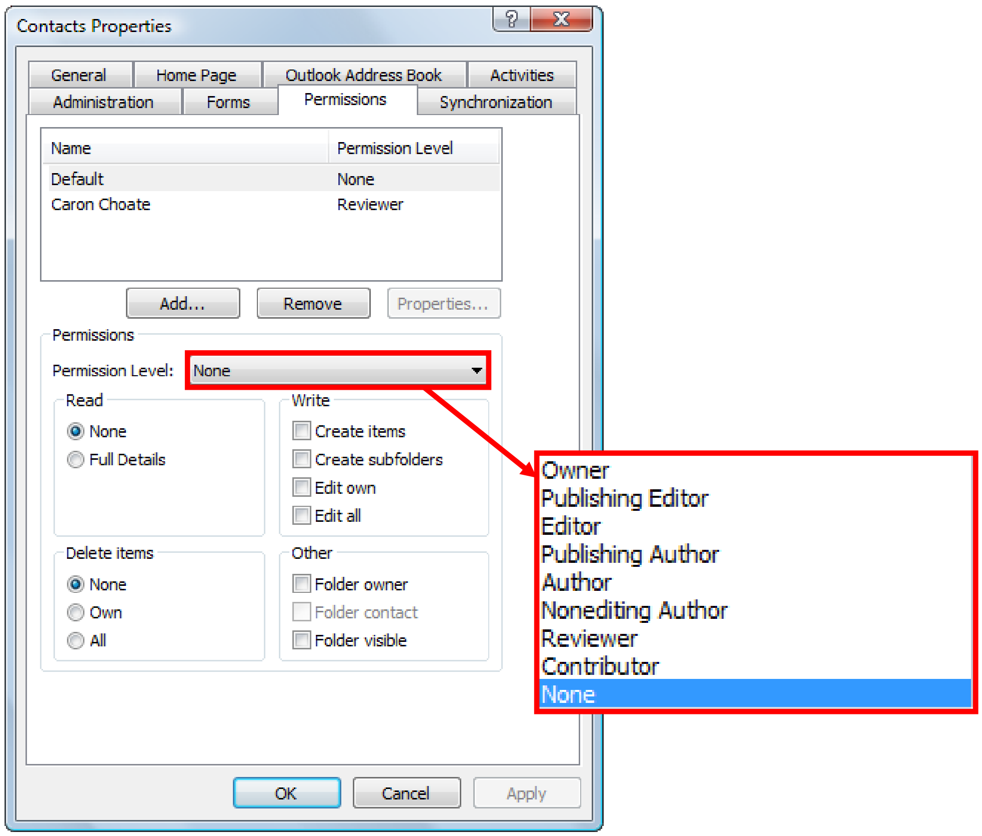


Figure 29 – Changing Shared User Permissions

Outlook has a full range of built-in permissions. The following list identifies the built-in permission levels and the rights conferred to shared users:

- **Owner** – Create, read, modify, and delete all items and files, and create subfolders. As the folder owner, you can change the permission levels others have for the folder.

- **Publishing Editor** – Create, read, modify, and delete all items and files, and create subfolders.

- **Editor** – Create, read, modify, and delete all items and files.

- **Publishing Author** – Create and read items and files, create subfolders, and modify and delete items and files you create.

- **Author** – Create and read items and files, and modify and delete items and files you create.

- **Contributor** – Create items and files only. The contents of the folder do not appear.
- **Reviewer** – Read items and files only.
- **None** – No permission; no folder access.
- **Custom** – Perform activities defined by the folder owner.

Note that a delegate can only be granted Author or Editor permissions.

In a shared contacts folder, all contact details are available to those sharing the folder. To make the details of a specific contact private, open the contact and click **Private** on the **Contact** tab, as shown in **Figure 30**.

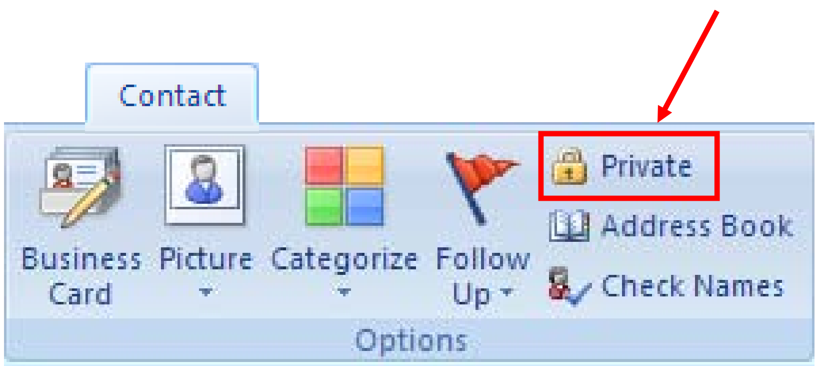


Figure 30 – Marking a Contact Private

Users can access folders shared by other Exchange users. Simply click **Open Shared Contacts** in the **Navigation Pane**, enter the e-mail address of the user sharing the Contacts folder of interest, and click **OK**. If a user has been granted permission to access the requested Contacts folder, it will appear and be accessible in the **People's Contacts** group on the **Navigation Pane**. If a user does not have the requisite permission, Outlook denies access but provides an easy means for requesting access, as shown in **Figure 31**.

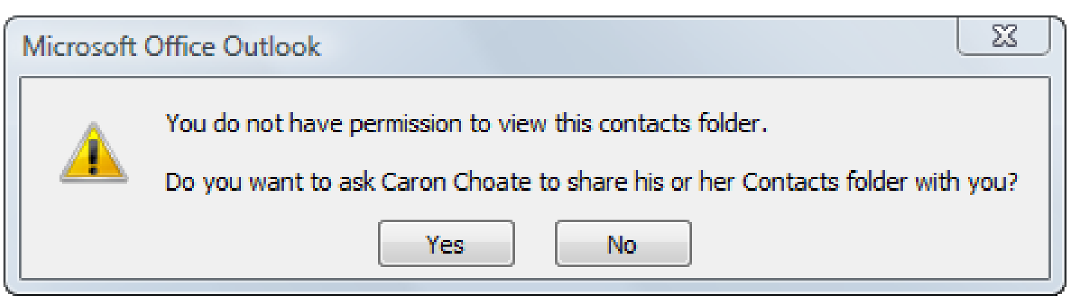


Figure 31 – Denial of Access to a Shared Contacts Folder

Getting Started With OneNote 2010

What is OneNote?

Microsoft OneNote is a computer program for free-form information gathering and multi-user collaboration. It is used to gather users' notes, drawings, and audio in one place, much like the bound paper journal of past years. OneNote 2007 and later can also be used to share information with other users of Microsoft OneNote 2007, or later, via the Internet.

Microsoft OneNote could be thought of as a basic word processor where users can enter typed text, create tables, and insert pictures. However, unlike a word processor, users can simply write anywhere in the document page by clicking or taping on the location where they wish to enter data.

One of the nicest features of OneNote is that the user does not need to issue a save command as Microsoft OneNote automatically saves every change in real time when the change occurs.

Information in Microsoft OneNote is saved in Pages which are organized into Notebooks. OneNote's interface is an electronic version of the traditional binder approach which is used for making notes, and for gathering materials related to the subject.

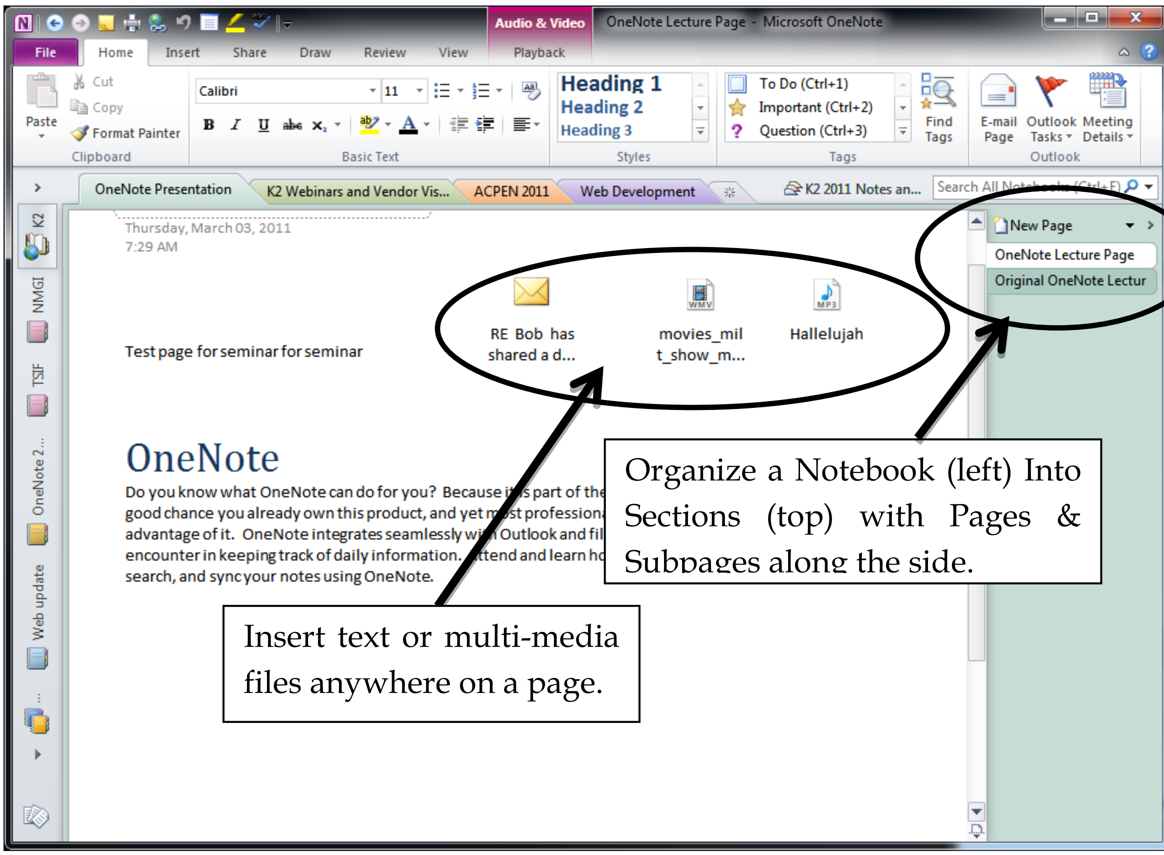
OneNote notebooks are designed for collecting, organizing, and sharing what you might think of as unpolished materials; while word processors are usually targeted at creating a document in a final, to be published form. The difference shows in certain features and characteristics: Pages can be arbitrarily large; images can be pasted into a Page without quality loss; there is no support for enforcing a uniform page layout or structure. Pages can be moved inside the binder, annotated with a stylus, word-processing or drawing tools. Users may add embedded multimedia recordings and web links. OneNote's file format (.one) is proprietary. The published API has resulted in a small number of extensions being written. While OneNote is most commonly used on laptops or desktop PCs, it has additional features for use on Tablet PCs using a stylus.

OneNote provides integration of search features and indexing into a free-form graphics and audio repository. Images (e.g., screen captures, embedded document scans, or photographs) can be searched for embedded text content. Electronic ink annotations can also be searched as text. Audio recordings can also be searched phonetically by giving a text key, and can be replayed, concurrently, with the notes taken during the recording. Its multi-user capability allows offline editing and later synchronization and merging at the paragraph level. This makes it a tool for workgroups that collaborate on research whose members are not always online. OneNote is designed as a collaborative tool and allows more than one person to work on the same page at the same time, making it a shared whiteboard tool as well.

Let's begin working with OneNote.

Working with OneNote

OneNote launches from an icon or Start Menu list. You will notice when you open OneNote that the layout is similar to other Office Suite products as OneNote uses the now popular Ribbon navigation.



Opening, closing, and saving notebooks

The ***left Notebook navigation pane*** shows what Notebooks are available for you to use. Clicking on a Notebook selects that Notebook. If a Notebook is not open and available, ***right click on the Notebook navigation pane and select Open Notebook,*** or click on the ***File (Backstage) Tab and select Open*** *to open an existing Notebook or create a new one.*

To close a Notebook, ***right click on the Notebook*** you wish to close from the left Notebook Pane and ***selecting the Close*** option.

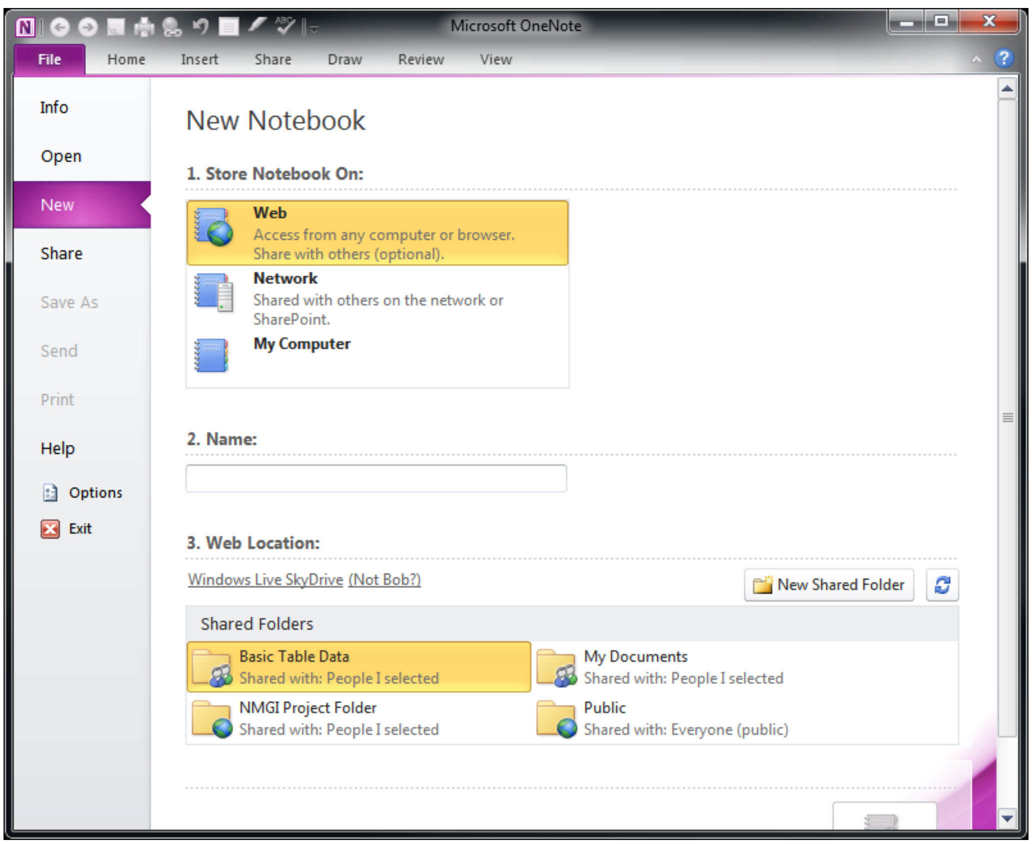
You may close OneNote completely from ***File Exit***.

There is no need to save changes before closing OneNote or a notebook. OneNote saves everything you enter into it automatically in real-time.

Also, OneNote never completely shuts down ***unless you close it from the Icon Tray***. Even then, it is still running in memory and will automatically start when you boot your Windows computer until you change the option to open on Start Up. To save a specific Page, Section or Notebook, click on ***File, Save As***. OneNote can save any Notebook or Page as a Word, PDF, XPS, or Web Page.

Creating new Notebooks and Working with Pages

When you first open OneNote, you will notice a few default Notebooks provided for you. Close any of these you think you may not use. If you change your mind, you can always reopen them. ***Notebooks are saved in My Documents/OneNote Notebooks.*** To create a new Notebook, right click on the Notebook Navigation Pane, select Notebook and complete the form window that is presented.

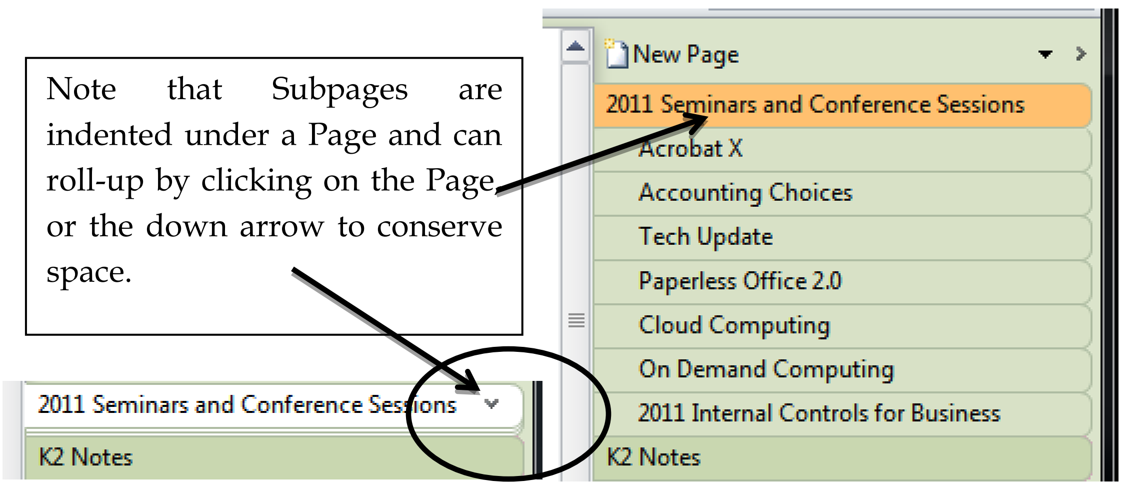


Creating, moving, and deleting sections and pages

Notebooks are composed of Sections (the tabs along the top), Pages, and Subpages (listed down the right hand panel). These are created similarly to Notebooks by right clicking in the Section bar along the top for a new Section, or in the Pages Panel along the right-hand side, or from the drop down at the top of the Pages Panel.

Working with subpages

You can continue to enter data onto a Page almost indefinitely, but creating subpages allows you to better organize topics. Subpages will roll up into the Page tab they are under, so to navigate to a Subpage, click on the roll-out arrow on the appropriate Page tab. If there is no roll-out arrow, there are no subpages. If the subpage tabs are left open to view, you will notice that the text is slightly indented to indicate an outline of pages.



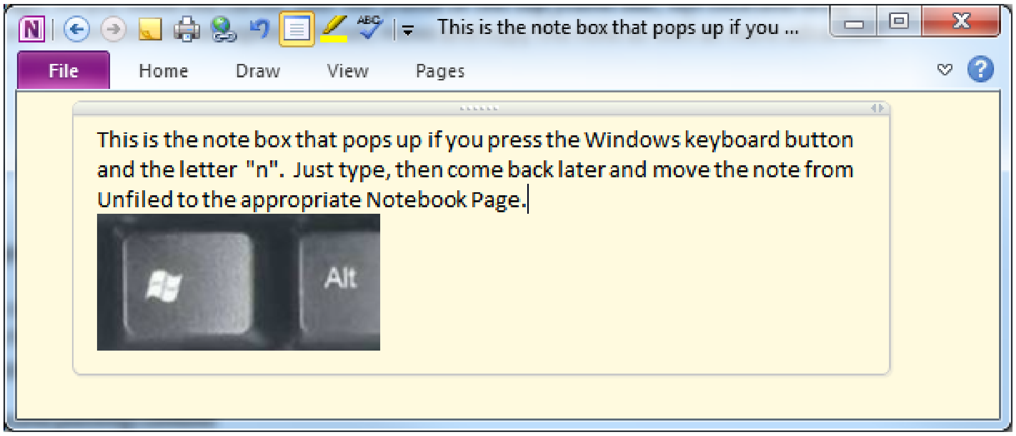
Creating a note on a page

To create a note, simply click anywhere on a page and begin typing; OneNote is free form. Note boxes will expand to the right as you type. Each note is surrounded by a frame. To move the frame anywhere on the page, simply ***move the cursor over the frame or the top frame bar, left click and drag***. By right clicking in the box, you will see options to cut, move, and copy the note, as well as more advanced options.

Adding Content to Notes

Working with unfiled notes

You can create a note on the fly by pressing the Windows button and the letter N. This will open a window for you to enter an ***unfiled*** note, which you can come back later and expand, move, or delete. These types of quick notes may also be referred to as **Side-notes**.



Copying and pasting content

Content can come from almost anywhere you can Ctrl-C or use the Copy command to copy text or images to the Clipboard. First, select and copy the information from the application, such as Word for example. Then, ***open OneNote, select the Notebook to include, click on the page tab and Ctrl-V, or Home Paste command to paste the information***. If you want to paste to a new page, ***hover over the page tab*** where you want to insert a new page and ***move your cursor slightly to the right***. You will see a small box appear. Simply move up or down and click on the new page box to insert an untitled page and then paste your text and rename the page.

Adding Images from Screen Clippings and Pictures

At some point, you may want to add a clip from a screen to a notebook. Clipping information from a web-page is a common example.

1. Open the application or screen containing whatever data you wish to capture.
2. Locate the cursor at the location on the Notebook Page where you want to paste the screen clip and click.
3. From the ***OneNote Insert Tab***, click on ***Screen Clipping***; your screen will turn pale and cross hairs will appear.
4. ***Move the cursor to where you want to start*** the clip and then ***left click and drag, encompassing the area you want to capture***, and then release the left mouse key. The selected information will appear as a clip in OneNote at the location you selected.

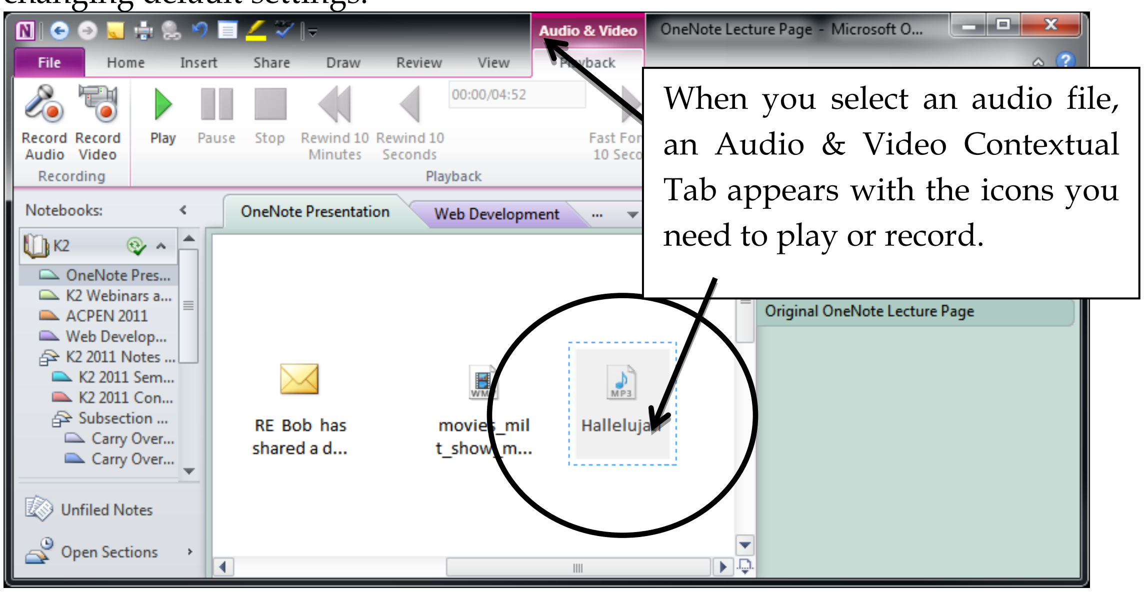
To add a picture to a notebook page:

1. Click on the location of a page where you want the image to appear

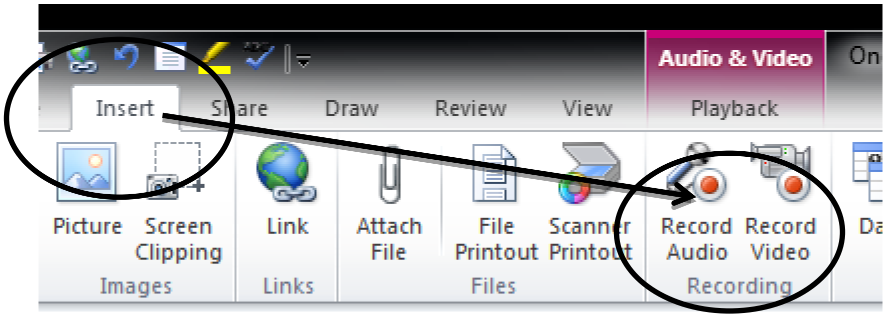
2. From the ***OneNote Insert Tab*** select ***Picture***.
3. ***Navigate to the picture you want to capture***. If the file you are looking for is of a specific format, you can select that from the Insert Picture window to the right of the File name box.
4. ***Select the image*** you want by clicking on it and it will appear on your OneNote page.

Adding or Recording Audio Video Files

1. Click on the ***Insert Tab*** and ***Attach File***, and then navigate to the file you wish to attach.
2. ***Select the audio file*** and it will be copied and embedded into the note page.
3. ***Left click on the icon and drag it*** to the location on the page you would like to display the icon and filename.
4. When an audio or video file is selected, you will see a new Audio & Video Contextual Tab on the Ribbon. This ribbon, when selected, includes the navigation buttons you will need, as well as Audio & Video Settings button for changing default settings.



To record an audio comment, or what is being said around you, click on the ***Insert Tab*** and ***Record audio***. As the recording is continuing, *you may also type in brief notes that are tied back to the audio recording so that you can come back later and listen to specific cut outs of the entire recording*. Coming back later and hovering on specific text will cause a play button to appear on the right. Click the play button to listen. This same technique works for recording video as well. To set the link, remember to go to File Options Audio & Video settings and set the option for playing linked audio and video at the top of the right options box.



Adding files

Commonly we want to attach electronic files to our notebooks, kind of like when we used to paperclip or staple a document to our journals. To attach a file to a Notebook Page, click on the ***Insert Tab, Attach File*** and *browse to the file you want*. When the file is double clicked, it will open in its native application.

Sending to OneNote

Microsoft Office Suite and Microsoft Browser have a method for you to send information directly to OneNote. The simplest way is to select the text you want to see in OneNote and then click on ***File Print*** and ***select the OneNote 2010 Printer***. Then move the information to the appropriate Page in OneNote.

Formatting Notes

As you use OneNote to take notes, don't worry about the formatting. Just type or write with your stylus. You can easily come back and edit and format the text as needed. Formatting in OneNote works just like Microsoft Word or Excel. You can edit and format from the Ribbon Home Tab or you can use the Mini Tool Bar. It is also easy to use format text from the Styles Group on the Home tab as well. The instructor will demonstrate multiple ways to edit and format text.

Using bullets and numbering

Like Microsoft Word and Excel, OneNote includes tools on the Home Tab for formatting lists and adjusting margin display. The instructor will demonstrate using features of the Paragraph group.

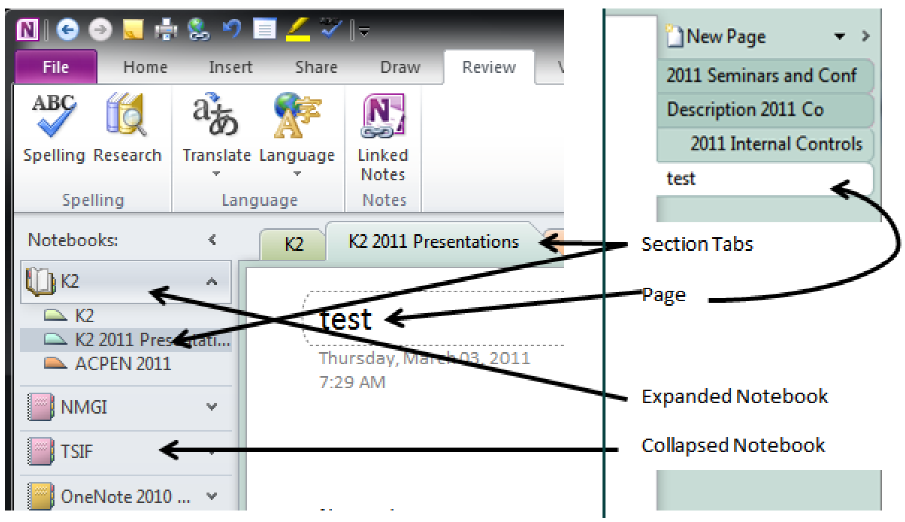
Checking spelling

Spell checking, again, works identical to the other Microsoft Office Suite applications. Select Spelling from the Review Tab on the Ribbon. To set defaults, go to File Options and select Proofing. Remember, spelling and proofing settings, as well as the dictionary, is the same across the entire Office Suite.

Viewing and Organizing Information

Organizing the user interface

When you become an active OneNote user, you will find yourself with a number of notebooks and each may have many sections. This can be a little distracting when working and all the notebooks are visible on the left notebook navigation panel. Collapsing notebooks you are not working with, and subsequently, expanding notebooks you are working with makes it much easier and quicker to navigate. Clicking on the ***down (expand) or up (collapse) arrow by each notebook*** will accomplish this goal. We never seem to have enough work space on our desktop so if you would like to maximize your workspace in the open notebook section page, you can ***collapse the Notebooks Panel or the Pages Panel by clicking corresponding arrow on each***.



Click on ***the View Tab*** to select the work setting that fits best for what you are doing. The *default view is* ***Normal View*** and you should see that selected to the far left of the ***View Ribbon Tab, Views Group***. *Selecting Full-Page View gives you the entire page and hides the side panels and the ribbon bar.*

If you want to see only the ribbon, click on the down error to the far right of the Ribbon bar. If you are busy boiler plating the common practice of compiling a document from many other documents, you should select the ***Dock to Desktop view***. This will dock OneNote to the desktop next to your active application window making it easier to copy and paste back and forth. This works great with larger monitors. To return, simply click on the Normal View option again. In the Dock To Desktop view, the Normal view button will be at the top of the docked OneNote window. Try each of these to see how different the Views are and the advantages of each.

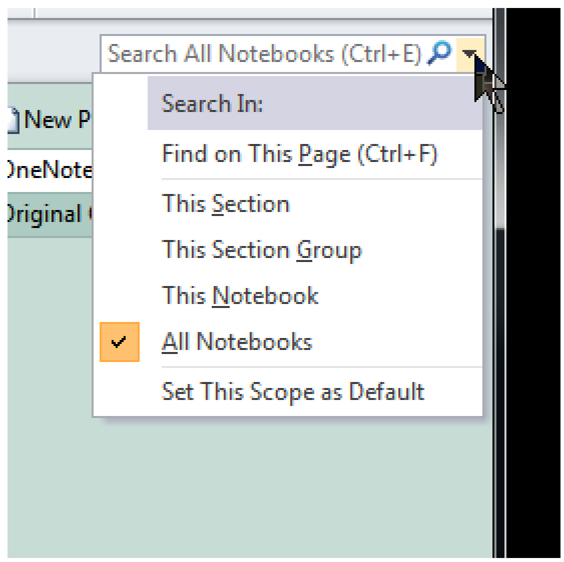
Creating multiple page views in new windows

Similar to Excel, you can open multiple page views by creating a new window. This simply opens another window to the same view as the current OneNote window.

1. Click on the View Tab, New Windows, to create a new view of the opened Notebook,
2. Arrange these windows and click on different pages as you need.
3. As in Excel, these are only views into the same OneNote session, so changing any page on any open view effects that Notebook across all views.

Searching a notebook

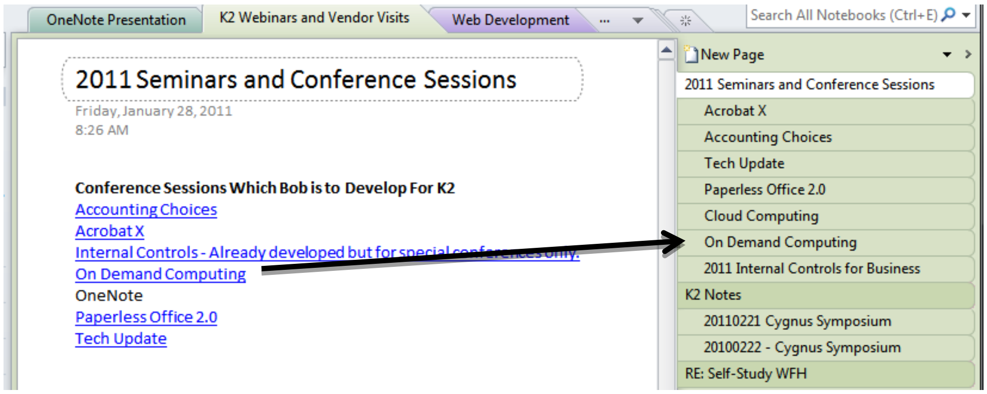
The more notebooks, sections, and pages you create, the more important it becomes to be able to find and reference information. ***The Search feature in OneNote can be found quickly in the top right above the Page Panel.***



You can search all notebooks, a section, or page by *clicking on the down arrow to the right of the search box*. If you have enabled indexing of audio and video files, search will even search these files and let you know how far into the recording the search criteria can be found. This is set from ***File Options Audio & Video*** and enables Audio Search at the bottom of the options windows. *Note that this may save significant indexing as well as search time.*

Creating links to pages, files, or locations

One of the best ways to stay organized is to use linking. To create a link, ***click and drag to highlight area to link***, and then click ***Insert Tab and Link***, or ***right click and select Link***. Because you can now share notebooks and pages over the Internet with others, you want links to be intuitive and easy to follow. If you are linking to a file on your local system or protected network folder, others may not have access to the link.



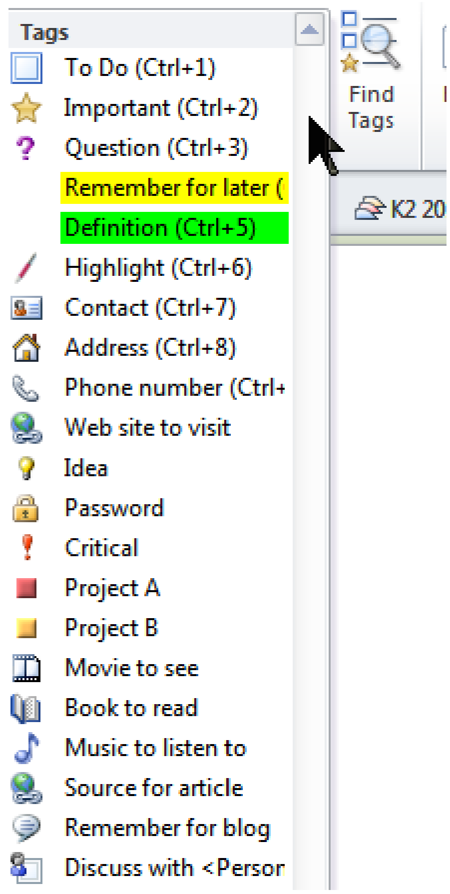
Tagging notes

The more notebooks and pages you have, the harder it is to keep track of things such as, things to do, books or movies to read or see, or keep track of important items to follow up on, and so forth.

Creating tags, accumulating tags, and updating tags is easy. You apply tags from the Home Tab Tags Group.

You highlight the information you wish to tag, and then select the tag to apply. Next to the Home Tags dropdown box, there is also a Home Find Tags option to help you locate tags that have been created.

Practice this on your own to add tags to your pages to help you organize, as well as to improve documents you share with others.

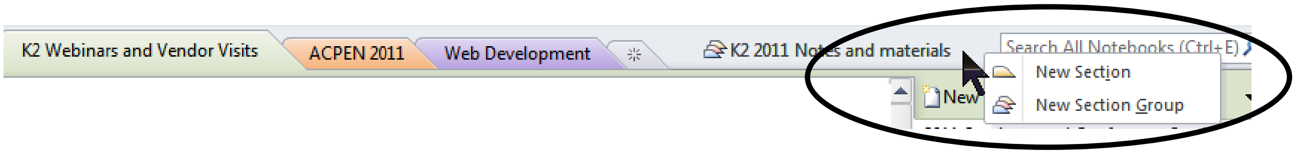


Understanding sections and section groups

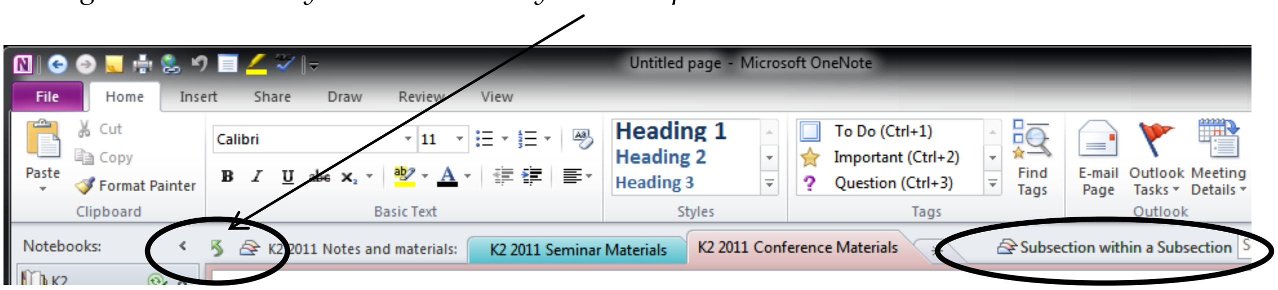
If you think about your paperbound notebook, or perhaps one you used in college, you remember that it most likely contained sections. Some contained sections within the notebook, so you could have had a notebook for Accounting and then a Section for Accounting 101 and another for Fundamentals of Accounting, and so forth. Within the Accounting 101 Section may have been additional sections that included Class Lecture

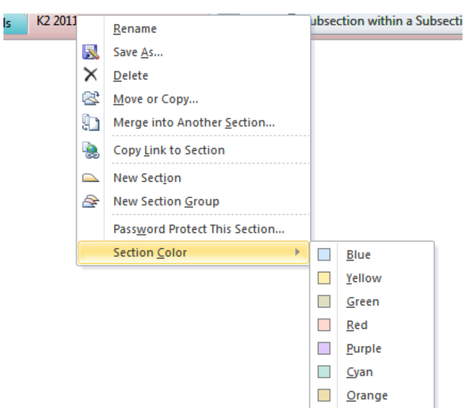
Notes and another for Study Group Notes. Being able to organize by sections is important to managing notebooks. You do the same thing with OneNote. ***You can also create section levels by grouping sections together to create a section group.***

1. Click on the section bar (where your tabs are) and select new section group.
2. Name the Group Section
3. Begin either creating your tab sections, or move sections from other groups.



As you can see from the following image, we have a Section Group called K2 2011 Notes and materials. This Section Group also has a Section Group called Subsection within a Subsection to demonstrate the point that you may organize sections and pages within sections for a multi-tiered notebook. To the far left of the section bar, *there is a small green arrow that you click to move you back up the notebook.*





Another feature you will like is color coding the section tabs. This allows a user to quickly recognize a specific section. ***Right click on any Section Tab and select Section Color.***

Yet, another important feature is the ability to protect a section with a password. ***Right click on Section Tab and select Password Protect This Section***, and follow the instructions on the Password panel that appears. Use the same steps to remove or change a password.

Working with Tables

Creating and working with tables

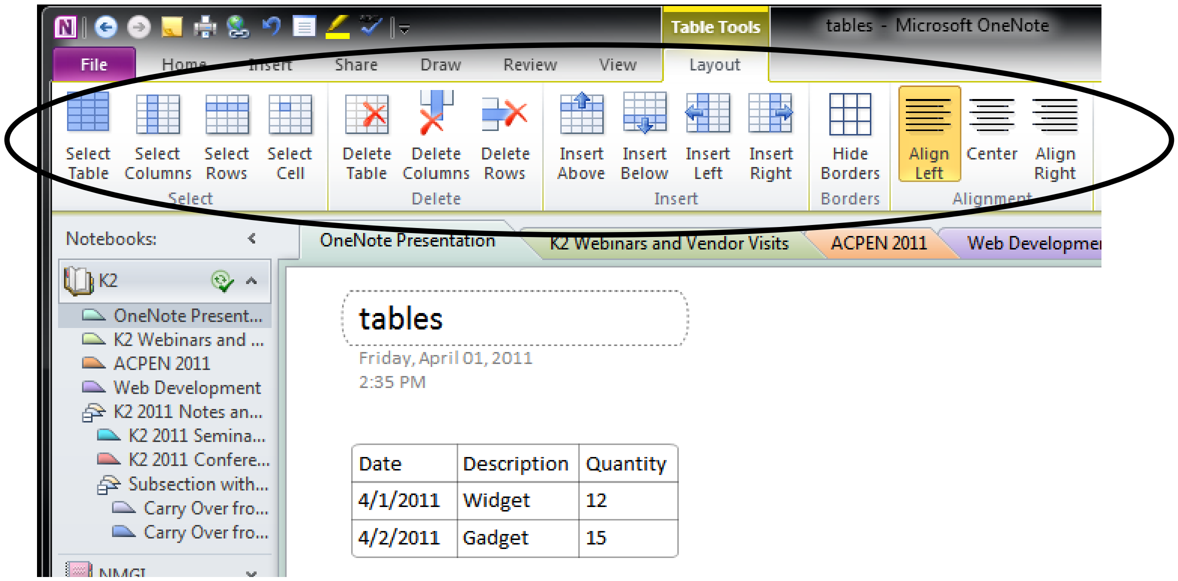
Tables are a great way to organize data that is presented in a row column format. To create a table:

1. Click on the location on the Page where you want the table displayed.
2. Click on Insert ***Table*** from the Ribbon.
3. Drag your mouse to select the table size you want, or the Insert Table option at the bottom of the roll out and fill in the size of the table you want. The table will now appear.

As you type, the column of the cell you are entering data into will automatically expand to fit what you are typing. ***Click into each cell and complete the entry***. *If the cell does not expand, it is because the note entry area is too narrow. Click inside the note entry area, then select the right outside note box border and drag right to expand the entry box.* Note, once you begin working inside the table, you will automatically have a contextual ribbon called ***Table Tools***. Use the Table Tools options to modify your table.

To practice this:
1. Create a new blank page by clicking on New Page.
2. Left click on the blank page to position yourself.
3. Click on Insert Table and use the mouse to draw the size of your table.
4. Begin entering data into the table cells.

After you create your initial table, you may need to add or delete rows or columns. Click inside the table wherever you would like to insert a row or column, and then select the appropriate options from the contextual ***Table Tools Ribbon***. Note that in the Delete Group box of the ***Table Tools Ribbon,*** you have options to delete columns, rows, or even the entire table.



Formatting tables and data

After creating our table, we may want to jazz it up a little by doing some additional formatting.

1. Select the entire table by clicking and dragging; select either rows or columns by positioning the cursor and then using the appropriate option from the ***Table Tools Ribbon*** and the ***Select Group***.
2. Once selected, you can use the ***Home Tab*** Ribbon to change font size, colors, characters, etc. In the event you decide you need some additional rows, you can position the cursor in the last row and column cell, and then press the ***tab key***.
3. Click anywhere outside the table to view the result.

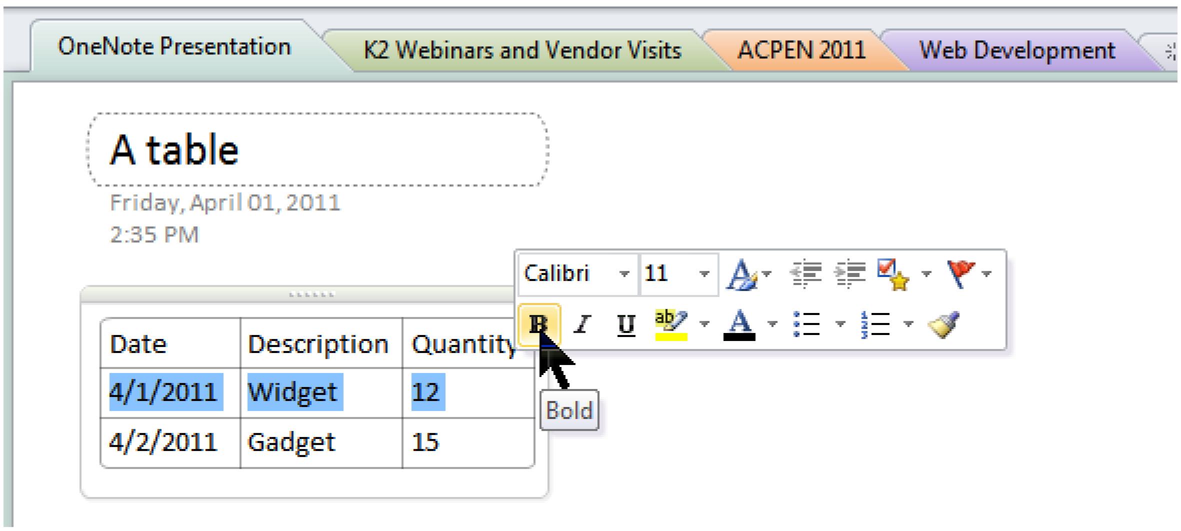
Depending on how you want to use the table, you may not want to display the cell and table borders. To hide borders:

1. Click inside the table.
2. Select ***Table Tools Tab, Borders Group, and Hide Borders***. This is a toggle option, so pressing again will display the borders.

Moving tables and data

As data changes on a page, you may want to move the table. Or, you may want to move rows of data around within the table after you create it. You could always Insert, Delete, and Copy Paste, but there is an easier way.

1. If you select a whole row, you will see a highlighted box appear at the left end of the row.
2. Click on the box and drag to move the row(s) up or down in the table.



The same is true if you want to move the entire table. Simply select the entire table and click on the box to the top left of the table and holding the left mouse button down, drag the box where you would like to have it.