Lehrmaterial des Dettmer-Verlages zeichnet sich durch eine übersichtliche Gliederung der Outlook-Themen aus und ist vielseitig verwendbar

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6 Managing and Planning Appointments

You can plan and coordinate appointments with Outlook. This information management application helps you organize your tasks, appointments and the whole daily work routine from one place on your computer. The same also applies of course for your colleagues and employees.

6.1 Summary from the introductory training material

The Calendar

To open the electronic appointment calendar, click the **Calendar** button in the folder pane or navigation bar. For switching calendar views, there are several buttons in the **Arrange** group on the **Home** tab and the **Arrangement** group on the **View** tab.

Basic settings of the calendar

Select **File** menu, **Options**, **Calendar** page. Here, you set, for example: start and end time of work hours, holidays, time zone(s).

Entering appointments into the calendar

You can switch to the date you want using Strg+G keyboard shortcut. Double-click the approximate time in the time bar on the left: a form window is opened, in which you can enter or select data. Alternatively, you can open a new form window in *any view* via **Home** tab, **New** group, **New Items** button, **Appointment**. To close the window, click **Save & Close** on the **Appointment** tab in the **Actions** group.

Changing an appointment

To change the length of an appointment, select the relevant appointment. Place the mouse pointer on the lower edge of the frame and drag it upward to shorten or downward to prolong. If you want to reschedule the appointment, double-click the appointment in the calendar to open the corresponding form window and make adjustments of the date or time (**Start time** or **End time**). Then click **Save & Close**.

Appointment reminder

By default, you are reminded of an appointment 15 minutes beforehand. To change, in the Appointment form window, click the little arrow ▾ of the **Reminder** button on the **Appointment** tab in the **Options** group and select another time from the list box.

Recurring appointments (appointment series)

Some appointments recur, for instance, each Monday or each 8th day of the month. In the Appointment form window, click the **Recurrence** button on the **Appointment** tab in the **Options** group. In the resulting **Appointment Recurrence** dialog box, make the settings. In the calendar, you can identify recurring appoinments by circlular arrows.

All-day events

To schedule an all-day appointment, activate the ☑ **All day event** check box to the right of the **Start time** boxes in the Appointment form window. All-day appointments are shown under the date header (column header) at the beginning of a day just like holidays.

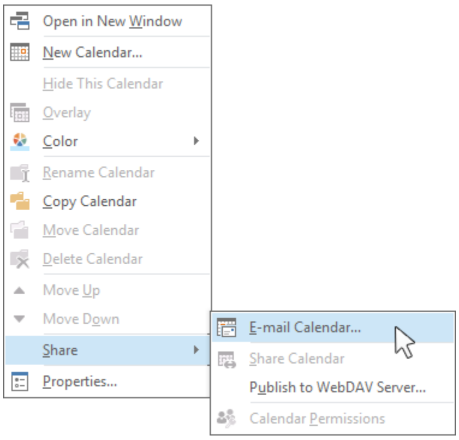
The to-do bar

You can display the so-called to-do bar at the right edge of the window via **View** tab, **Layout** group, **To-Do Bar** button, **Calendar**, **People**, and/or **Tasks**. Then, the date navigator (calendar), the scheduled appointments, and the task list are displayed there.

6.2 Sending the calendar via email

You can send your colleagues an excerpt from your calendar via email.

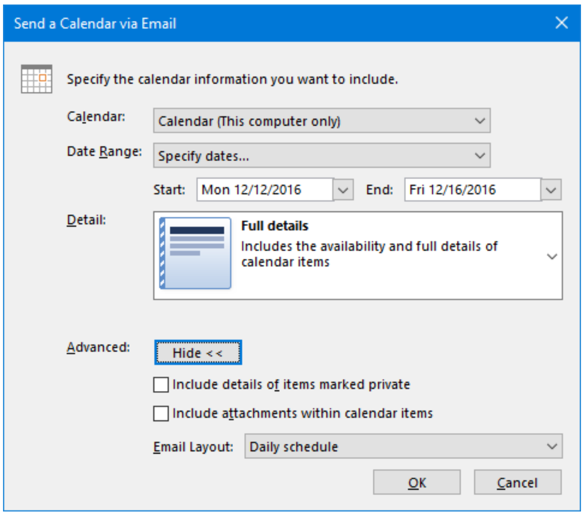
In the folder pane on the left, right-click the respective calendar in the **My Calendars** area. In the context menu, select the **Share** command and then **E-mail Calendar**. Or click the **E-mail Calendar** button on the ribbon (**Home** tab, **Share** group).



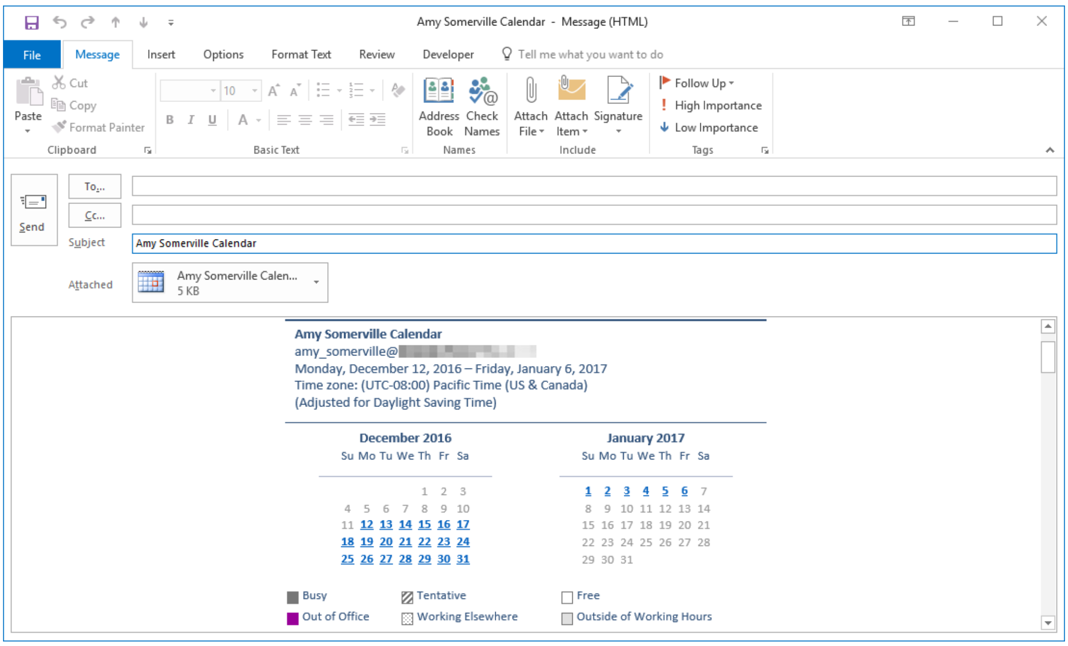
Calendar context menu

Adjust the calendar information in the dialog box shown to the right and click OK.

The calendar is embedded in a new email message. Enter the recipient address, insert text above or below the calendar information, and send the message:



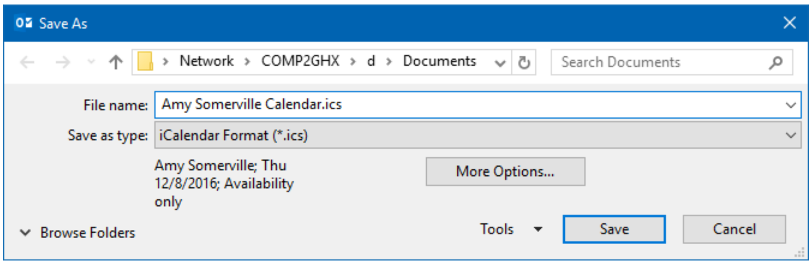
Adjusting the calendar information



The email message with the copied calendar information

6.3 Saving the calendar on a network or Internet server

To save the calendar on a network or Internet server, go to the **File** menu and click **Save Calendar**. In the following example, the calendar is being saved to the D: drive of the network server COMP2GHX. It can also be an Internet site, however. Everyone who has access to this folder can view the calendar.



Saving the calendar on the network

Open the dialog box to adjust the calendar information with the `More Options` button. After you save it, other people can import this calendar file (***.ics**) into Outlook.

6.4 Exercises

Imagine you are in charge of a project in a company and meet with the individual project team members in order to discuss their progress and what further action should be taken. In addition, your boss wants to be informed about the current status of the project.

Keep a calendar with the following appointments and settings: The work hours begin at 9 a.m. and end at 6.30 p.m. The **Day** calendar ought to have 15 minute time intervals. (Customizing the time intervals: Right-click the time line and select the time interval (for example 15 minutes))

1. The talks with the project team will take place on October 9: you have an appointment with Ms. Kinner at 9:45 a.m., Mr. Muller is expected at 11:30 a.m., Ms. Hansen at 2 p.m., and Mr. Koslowsky at 3.30 p.m.
2. The description of the appointment will always be **Project - status quo**. In addition, it will include the name of the respective employee. Plan 60 minutes per meeting. Also, set a reminder for 30 minutes before the appointment.
3. The meeting with your boss will take place at 5 p.m. on the same day. It will probably last 45 minutes.
4. Once a week, every Monday at 9 a.m., you take part in a one-hour sales meeting.
5. On February 2, 3, and 4 you are registered for an all-day sales seminar.

7 Connected to Exchange

In large companies and agencies it is usually no longer enough to use Outlook without a connection to other computers. To make this connection, Microsoft offers the additional program **Exchange**. This requires a computer on which the so-called **Microsoft Exchange Server** is installed. Via the company or agency network, this server communicates constantly with the users, the so-called email **clients**. The connected computers receive the most recent information very quickly. Apart from that, the users are provides with several more internal communication options, e.g.:

1. Designating a delegate who can process your mails in your absence.
2. Joint appointment and resource planning via the calendar.
3. A global address book for all employees allows you to search for email addresses.

Message on the status bar

Provided that an Exchange mailbox has been set up for you and that your Outlook is also set up correspondingly, this mailbox appears in the folder list. The contents of this mailbox folder are saved on the Exchange server. If you wish, copies are created on your computer so that you can access the data already available even without an Exchange connection, i.e. offline.

Your personal folders are saved on your computer and only you can access them. Using the usual commands, e.g. drag and drop, you copy or move the data between the mailbox folders and the personal (local) folders.

Your Outlook is usually automatically connected to the Exchange Server. In case of a disruption, you will receive the message 

on the status bar at the bottom right. Outlook then tries to restore the connection to Exchange at regular intervals.

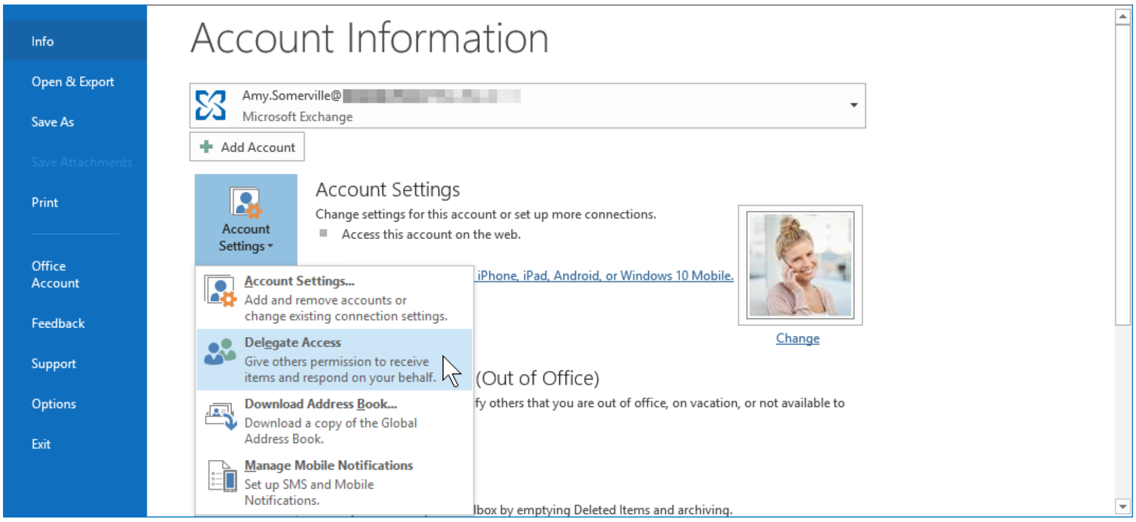
The connection to the Exchange server may also be made via the Internet to give employees the opportunity to access the Exchange mailbox from anywhere at any time. It can be necessary, e.g. for cost reasons, to work offline sometimes and to make a connection again later, for example when you are staying abroad. By clicking the button shown on the right on the **Send / Receive** tab in the **Preferences** group you switch offline mode on and off. A message on the status bar at the bottom right shows you the mode: 

.

Send / Receive tab, Preferences group

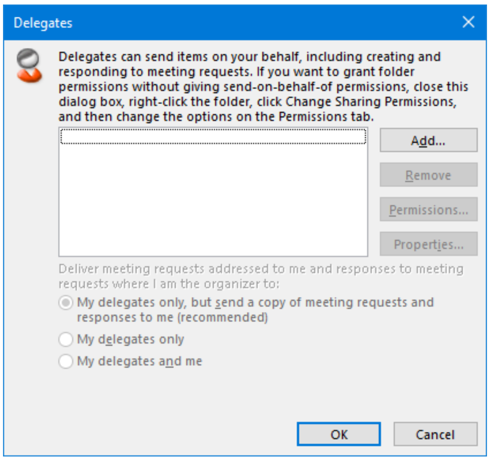
7.1 Delegation

With the Exchange server, Outlook is particularly directed to internal communication as well. Thus, there is the option of exchanging data with all employees within a company. If you are absent, you can assign a delegate to cover for this time. To do this, open the **Info** page of the **File** menu and click the **Account Settings** button and select the **Delegate Access** command from the submenu:



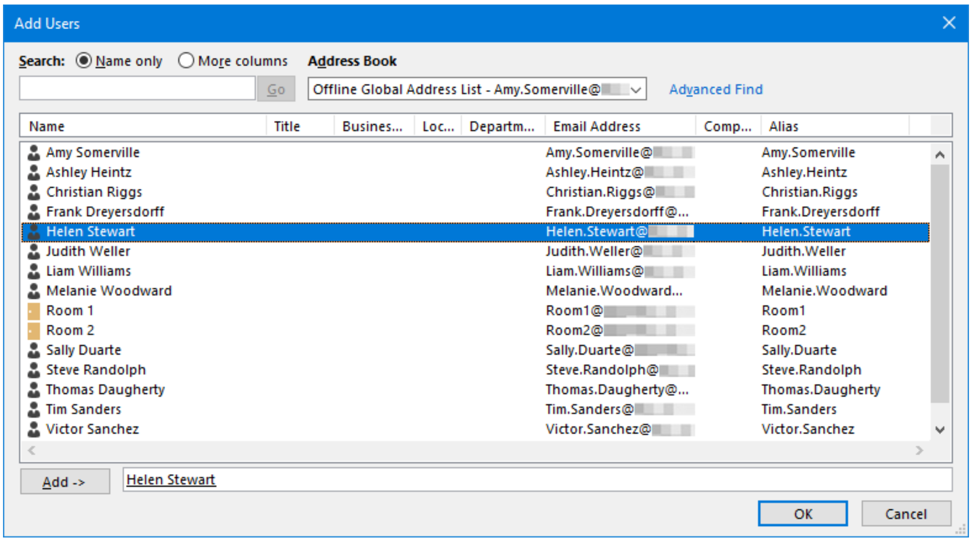
File menu (cut-out)

The dialog box on the right is opened. Click the Add button.



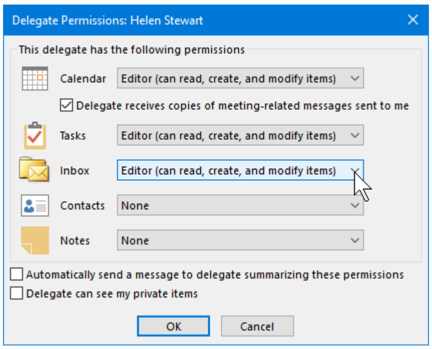
The Delegates dialog box

The global address book appears with all employees. Select your delegate and click the Add button:



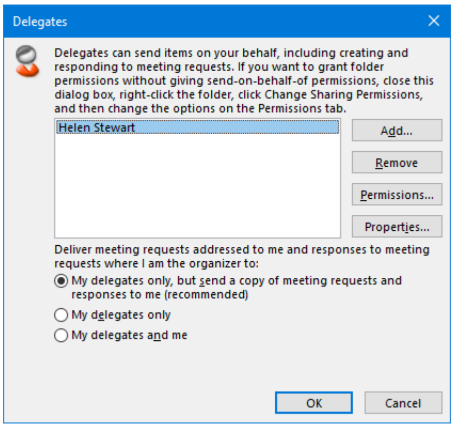
Adding a name

Once you have confirmed the selection with OK, you have to define the permissions of your delegate in the following dialog box:



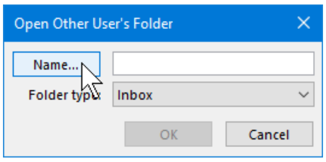
Defining delegate permissions

Make sure that the **Inbox** field doesn't contain **None** and close the dialog box by clicking [OK]. In the **Delegates** dialog box, you will now see the name:



The delegate has been entered

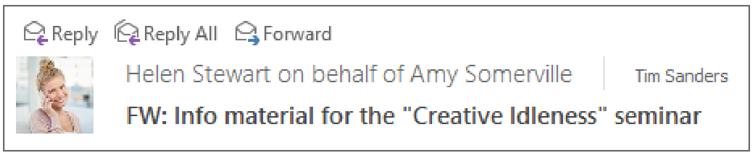
Click [OK]. After that, your mails can now *also* be opened and processed on the computer of the delegate using the following path: **File** menu, **Open & Export** page**, Other User's Folder** button. In the following dialog box, clicking the [Name...] button opens the global address list where you select the name.



Opening the global address list

If the delegate switches to a different view, the inbox of the person who is absent is closed and must be called up again in the same way. This can be somewhat inconvenient when the delegation occurs on a frequent or long-term basis. However, it can be avoided by setting up permanent mailbox access as described in the next chapter.

If the delegate replies or forwards an email on behalf of the person who is absent, this is clearly indicated in the sender line:



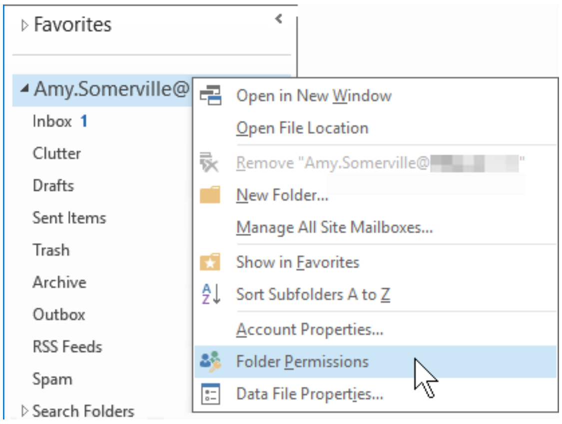
Sender line of the delegate

To make changes to your delegations, open the previous dialog box again, select the respective entry and click Permissions or Remove.

Setting up permanent mailbox access

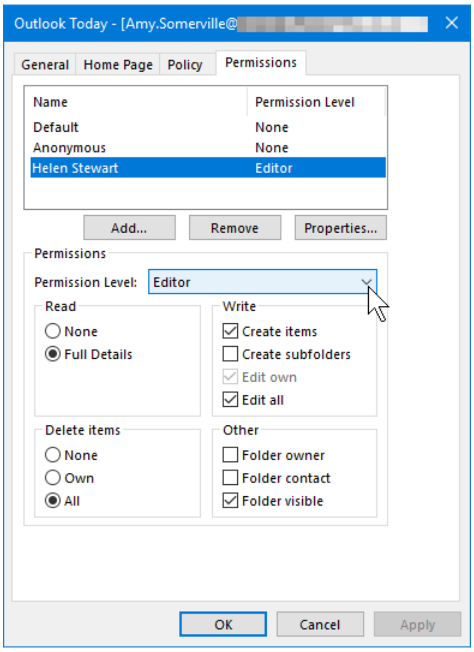
By setting up permanent mailbox access your delegate can have your email folder permanently displayed in their own **Mail** view. You simply have to share your mailbox and define which folders are displayed with which permissions. The delegate must then add the mailbox to their **Mail** view. In our example, Amy Somerville designates Helen Stewart as her delegate. Helen Stewart on the other hand adds Amy Somerville's mailbox to her own **Mail** view for permanent access.

1. In the folder pane of the **Mail** view, right-click your mailbox (in our example **Amy Somerville**) and select the **Folder Permissions** command from the context menu.
2. In the dialog box that opens, on **the Permissions** tab, click the Add button, double-click the person/people to select the one(s) you want to grant access permission, and confirm your selection with OK. The name appears in the upper part of the **Permissions** tab (here: **Helen Stewart**).



Adjusting folder permissions

3. Select the **Permission Level** by clicking the drop-down arrow. In the **Read**, **Write**, **Delete Items**, and **Other** areas below it, you can see which permissions the individual levels contain. However, you can also activate and deactivate options in these areas yourself.



Defining the delegator's permissions

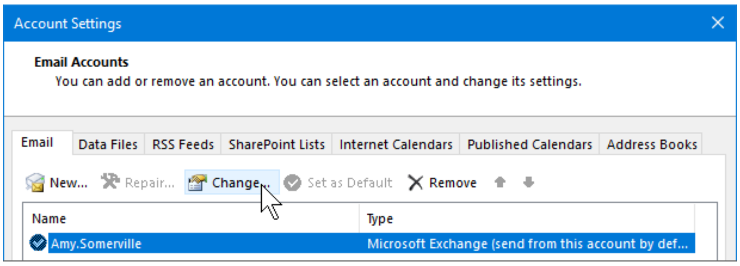
4. Close the dialog box by clicking OK. Helen Stewart has now access to the mailbox.

We still have to specify which folders the delegate can display in their **Mail** view and with which permissions. In our case, it is the inbox and the delegate shall receive full read/write access.

1. In the folder pane, right-click **Inbox** and select **Properties** from the context menu.
2. In the **Inbox Properties** dialog box, switch to the **Permissions** tab and select the delegate.
3. If necessary, select **Editor** as **Permission Level**.
4. Confirm your settings by clicking OK. The delegate can now add your inbox to their **Mail** view.

As the delegate, adding the inbox of the absentee to one's own Mail view
To display the inbox of the person, on whose behalf you want to act, in your mailbox, you have to add their mailbox to your **Mail** view:

1. On the **Info** page of the **File** menu, click **Account Settings** and select **Account Settings**.
2. On the **Email** tab, select your Exchange account (in our example **Amy Somerville**) and click Change.

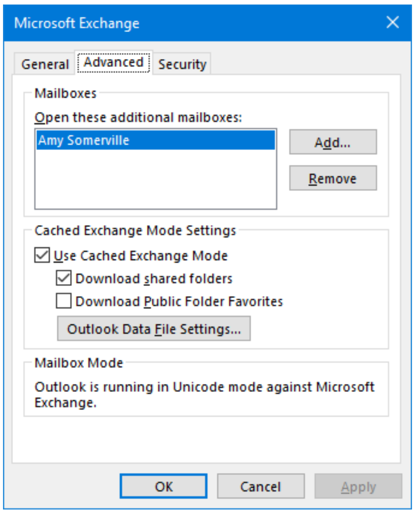


Selecting the account and clicking Change

3. In the **Change Account** dialog box, click More Settings and in the **Microsoft Exchange** dialog box, switch to the **Advanced** tab and click Add.
4. Type the name of the person whose mailbox you want to add into the **Add Mailbox** dialog box (in our example **Amy Somerville**) and click OK.

Entering the last name or a distinct first name is sufficient. If Exchange cannot find the name in the address list, you'll receive an error message.

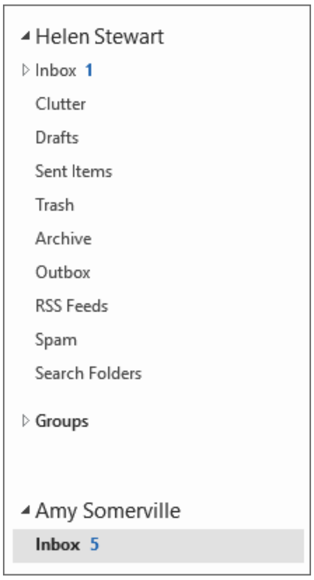
5. The name has now been entered in the **Microsoft Exchange** dialog box. Close it by clicking OK.



The additional mailbox has been entered

In the **Change Account** dialog box, click Next and Finish and then Close the **Account Settings** dialog box.

The mailbox is now available in the folder pane. You open it via the small triangle ▷ to navigate to the folders you have permission to access.



Folder pane of the delegate (Helen Stewart) with the mailbox of the represented person (Amy Somerville)

Removing the mailbox of the absentee from the Mail view
To remove the mailbox when you no longer need to act on behalf of the other person, go to the **File** menu (**Info** page), select the **Account Settings** command from the submenu of the **Account Settings** button, select your Exchange account, click Change, then More Settings, switch to the **Advanced** tab in the **Microsoft Exchange** dialog box, select the account of the represented person and click Remove. Confirm the question, if you are sure that you want to remove the mailbox with Yes, close the **Microsoft Exchange** dialog box by clicking OK and the **Change Account** dialog box by clicking Next and Finish.

7.2 Sharing calendars

In an Exchange environment in the default setting all users can only look at the busy times in the calendars of colleagues via the scheduling assistant (page 80). To see or change the details, a calendar needs to be shared. The notification about the sharing of a calendar is given with a message. A distinction has to be made between two approaches:

- You ask the email recipient to share their calendar with you (**Sharing request**), and/or
- You give the email recipient permission to view details in your calendar (**Sharing invitation**).

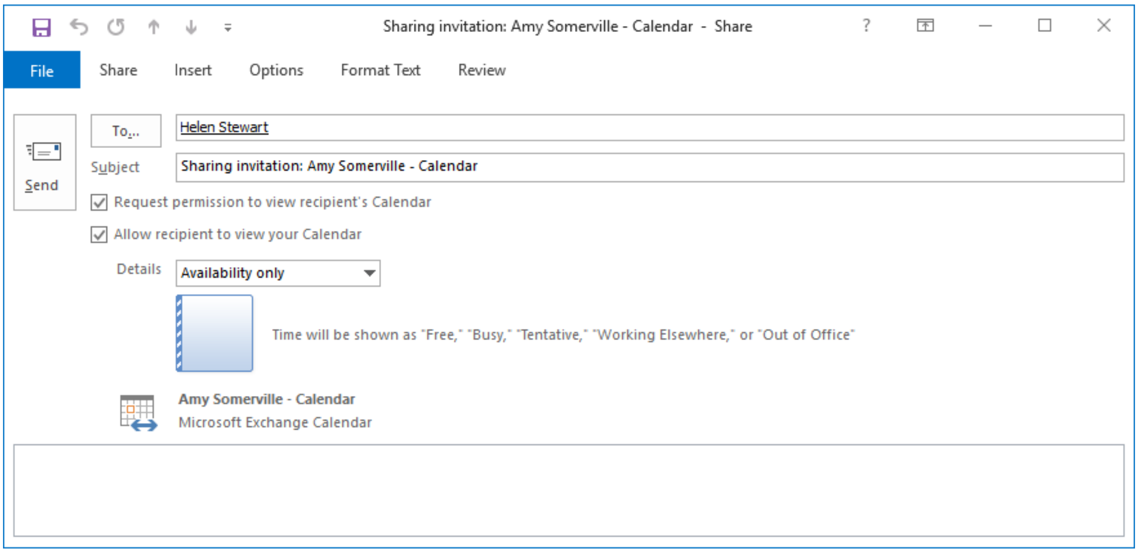
In the calendar view, on the ribbon, click the button on the right on the **Home** tab in the **Share** group. Outlook composes a new message with the sharing request or invitation. Enter the recipient's address or select it. Now, set the type of calendar sharing, you can also activate both check boxes:

Home tab, Share group

☑ Request permission to view recipient’s Calendar.

☑ Allow recipient to view your Calendar.

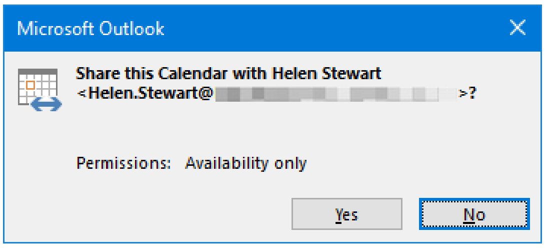
1. When you activate the lower check box, use the **Details** list box to determine whether only the availability, limited details or full details will be shown.



A message with the calendar sharing

2. When activating the upper check box, you'll send the recipient an email request to share their calendar. The recipient answers this request via the **Allow** or **Deny** buttons. If they allow it, the details can be adjusted in the window that opens and a message can be added in the text area.

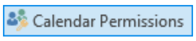
3. Click the **Send** button and confirm the question whether you want to share the calendar by clicking Yes.



Sharing the calendar? Yes!

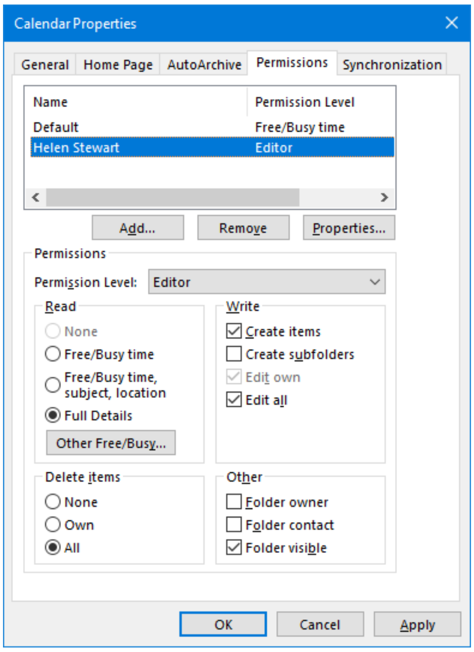
Calendar permissions

To adjust or remove the sharing of your calendar, click the **Calendar Permissions** button on the **Home** tab in the **Share** group.



Home tab,
Share group

In the dialog box on the right, first of all, add or select the respective name in the pane at the top. Now, set the various options for **Read**, **Write**, **Delete items** and **Other**.

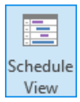


Adjusting the calendar permissions

Clear overview of shared calendars

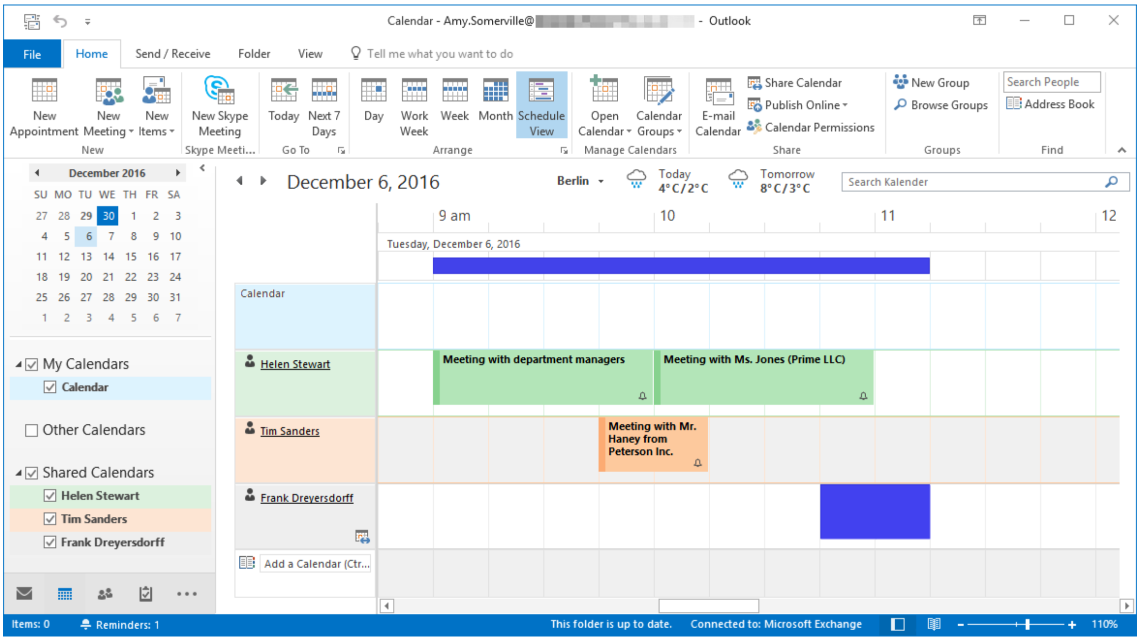
Assuming you want to coordinate the appointments of your colleagues to collaborate with them on a team project and they have shared their calendars with you for this purpose. With its **Schedule** view, Outlook makes it possible for these calendars to be displayed simultaneously one below the other providing a clear overview.

1. On the **Home** tab, in the **Arrange** group, click the **Schedule View** button.



Home tab, Arrange group

2. In the lower left part of the calendar section, successively type the names of the colleagues into the **Add a Calendar** field or select them via the address book. The calendars are now displayed below each other with your own calendar at the top.

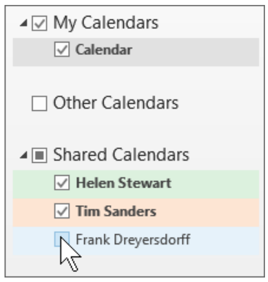


All calendars are shown in Schedule view

3. A timeline is located above the calendars; based on a blue bar you can quickly see when at least one person is not available.

Depending on their sharing details, your colleagues' calendars will only display busy times (for instance in the Frank Dreyersdorff example) or further information such as the subject. If only busy times are displayed you can send a sharing request by clicking the icon below the name. With the appropriate authorization you can also edit the appointments.

If you no longer want to display a calendar, simply remove the check mark in front of the respective name in the **Shared Calendars** section of the folder pane.

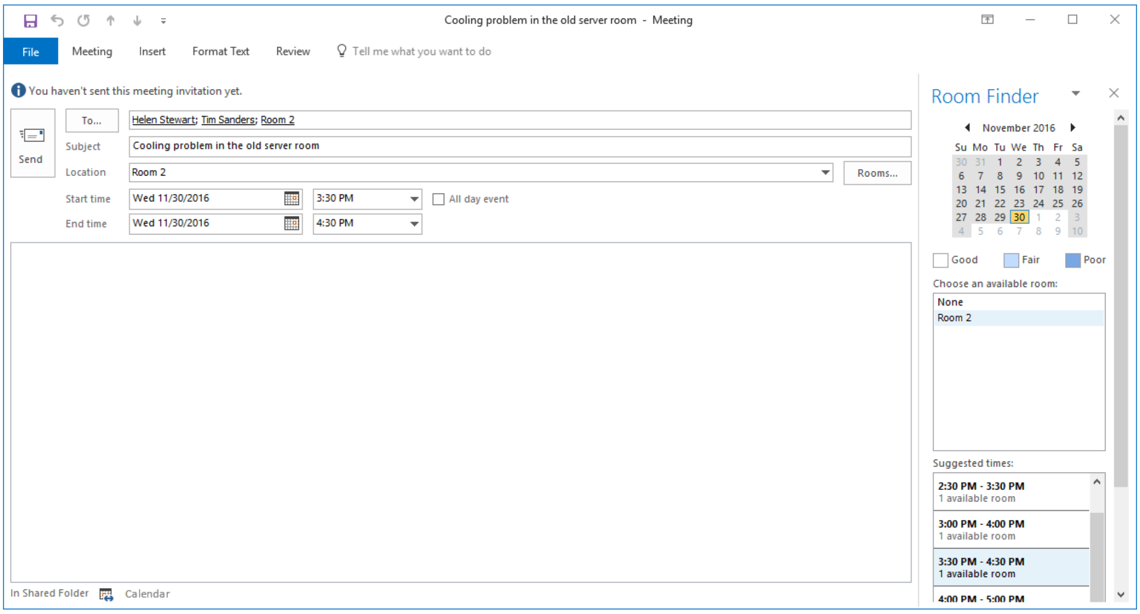


Hiding a calendar

7.3 Meetings

Joint appointment planning with Outlook in an Exchange environment is an important area of application. When planning a meeting, you can, for example, use messages to invite the attendees and reserve rooms and other resources.

To set up a new meeting, in the calendar view, click, for example, the **New Meeting** button on the **Home** tab in the **New** group. Determine the attendees using the To… button, type in a **Subject**, and select the **Location** using the Rooms… button, e.g.:

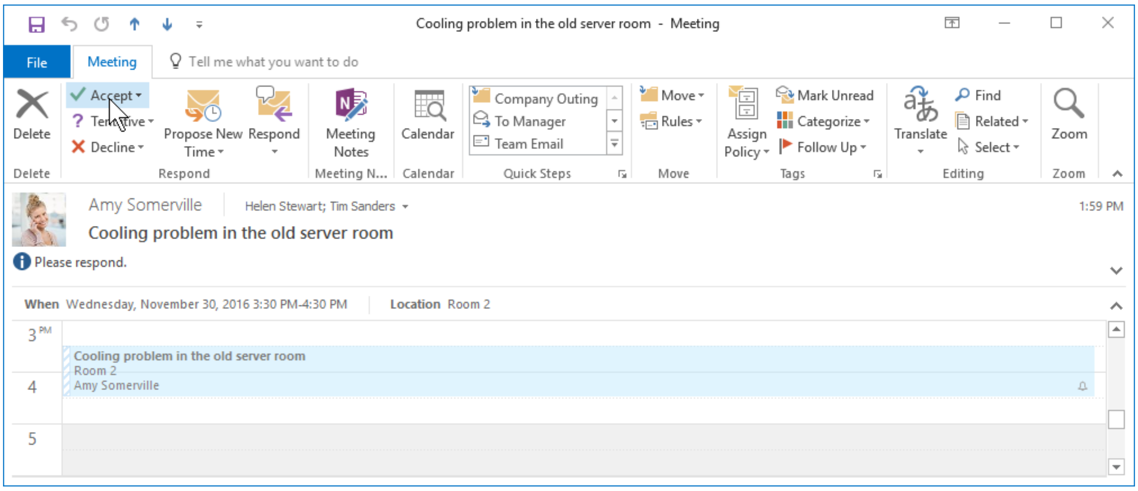


New meeting

While setting up the meeting, the availability of a room is already visible in the lower part of the **Room Finder** task pane.

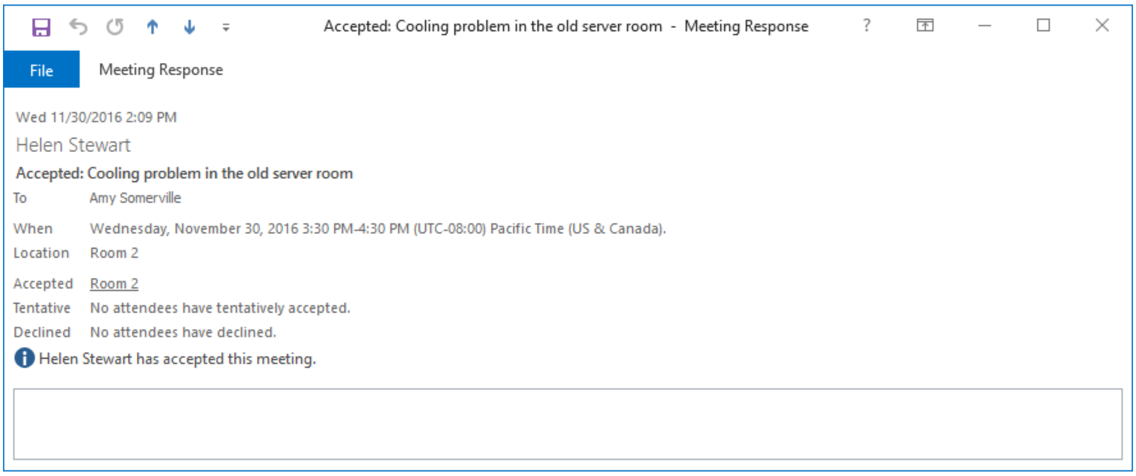
Once you have selected and typed in all content, you can send the invitations: Click the **Send** button, or press `Ctrl` + `Enter` the key combination.

The invited participants receive a **meeting request** via email. Using different buttons in the **Respond** group on the **Meeting** tab, the invitation can be answered: **Accept**, **Tentative**, **Decline**, **Propose New Time**, e.g.:



Replying to a meeting request (if necessary, open the calendar preview via ⌄ in the text area)

In the submenu of the **Accept**, **Tentative** and **Decline** buttons you can select whether you want to send your reply immediately, edit the reply before sending, or not send it at all. If the invitation has been accepted, the meeting will be automatically added to the calendar of the invitee. The organizer of this meeting will receive a notification of the acceptance (maybe tentative) or declination:

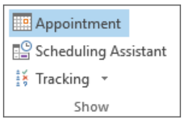


The meeting has been accepted

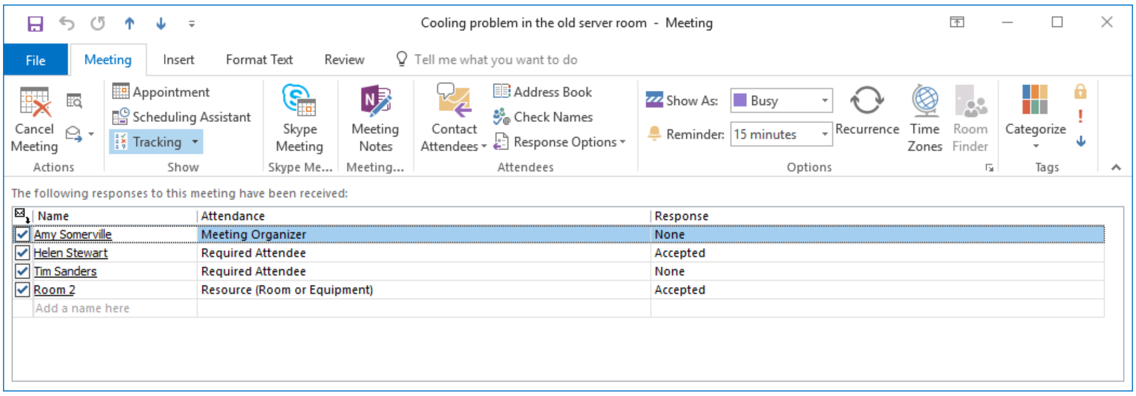
You also receive an automatic acceptance via email from the conference room if it is free at the time, or a declination if it is already booked.

Tracking

In the acceptance above, you can partially **track** the status of the attendees in the bottom left part of the email header; however, Outlook also offers you more detailed information on their status. To get this, switch back to the **Meeting** window. On the previous page this new meeting was planned in **Appointment** view. Once you have sent the invitations, the **Tracking** button is added to the **Show** group on the **Meeting** tab. With a click on this button you open the following view, e.g.:



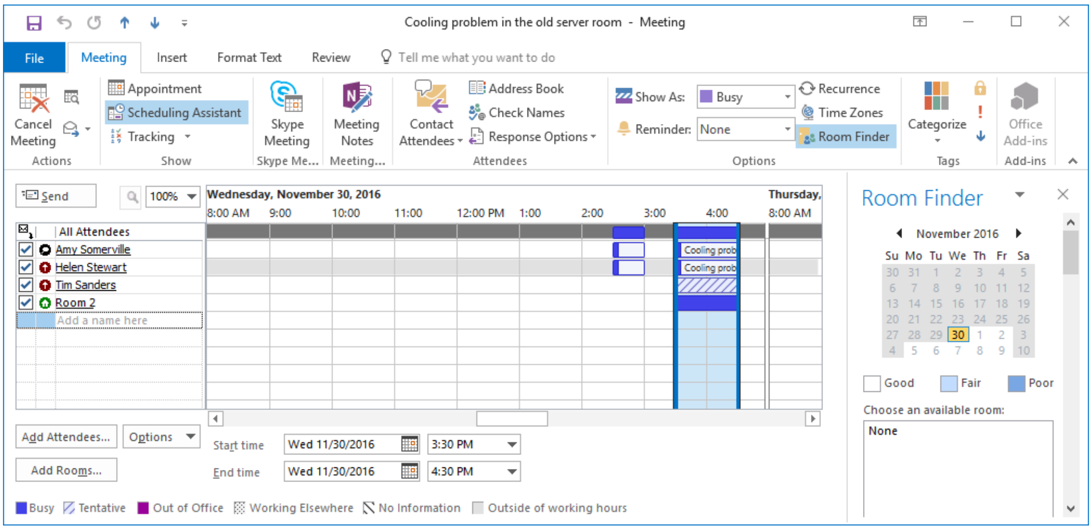
Now, there are three buttons on the Meeting tab in the Show group



The meeting in Tracking view

The Scheduling Assistant

Now, in the **Show** group, click the **Scheduling Assistant** button. To schedule meetings, additional options are provided in this view. Here, differenttly colored markers provide a good overview of the calendars of the planned attendees and resources (here **Room 2**). You can also add more attendees and resources and make changes and remove items. People who haven't sent a reply yet, are displayed as **Tentative**:

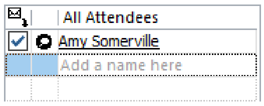


Scheduling Assistant view

Using the **Appointment** button in the **Show** group on the **Meeting** tab, you switch back to **Appointment** view.

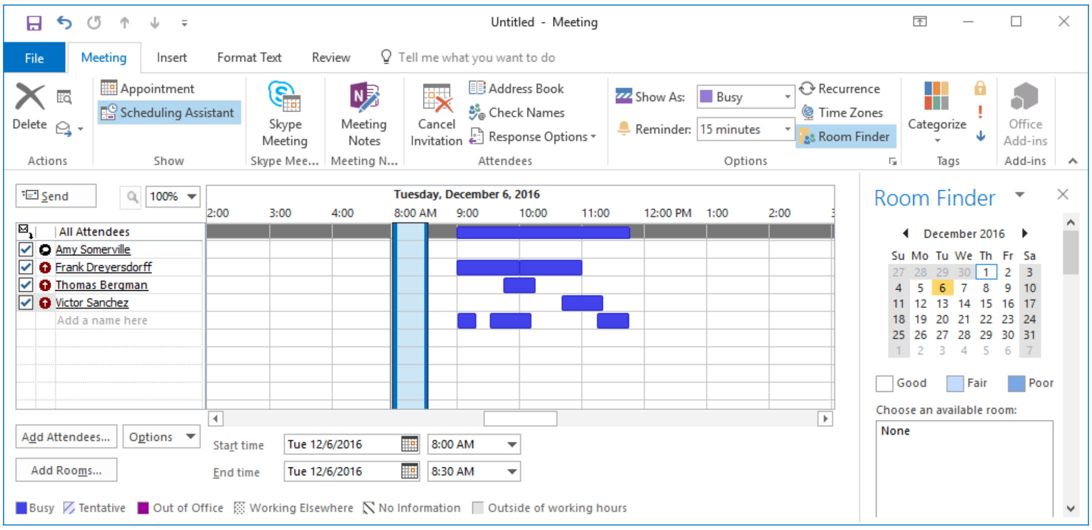
You can also use the scheduling assistant as early as for planning a meeting to see from the first when your colleagues are available. To do so, open a new meeting (**Home** tab, **New** group, **New Meeting** button) and click the **Scheduling Assistant** button to open the assistant.

In the left part of the window, place the cursor in the **Add a name here** field, type in the respective required attendees including the room or select them via the **Address Book** button (**Meeting** tab, **Attendees** group), and complete each entry by pressing the `Enter` key.



Entering the attendees here

Use the scroll bar to navigate through the possible times or select your favorite date and time in the **Start time** fields. The bars show you, which attendees have appointments at what times and you can schedule your meeting accordingly.

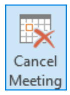


The appointments of all attendees are evident here

Click the **Appointment** button (**Meeting** tab, **Show** group) to switch back to **Appointment** view where you can enter a subject and a message in the text area and send your request.

Cancelling a meeting

If a meeting needs to be cancelled ahead of schedule, it is not enough for the organizer of the meeting to just delete the meeting from the calendar. Here, it is of course necessary to inform all the attendees and to release the booked resources again. To do so, in the meeting window, click **Cancel Meeting** button on the **Meeting** tab in the **Actions** group. Maybe change the subject and write additional information in the text area of the message. Then finally, click the **Send Cancellation** button. Only then will the meeting be cancelled!



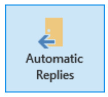
Preparing the cancellation message

Cancelling the meeting

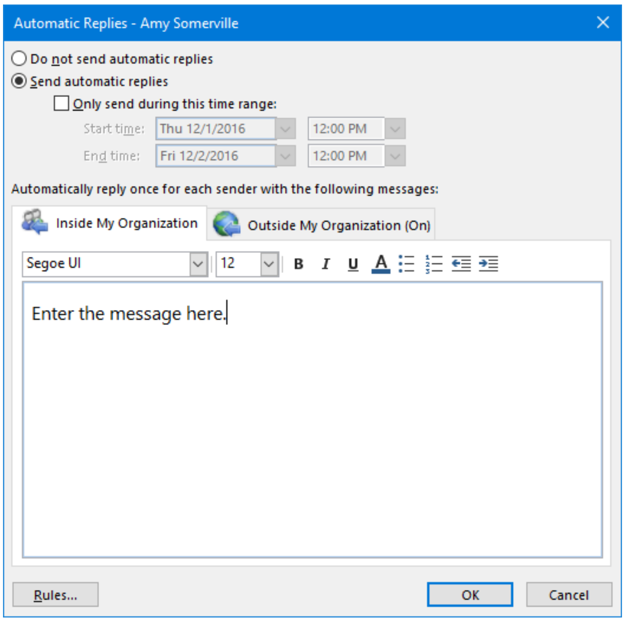
7.4 Automatic reply to email messages

You can set up Microsoft Outlook so that everyone who sends you an email message automatically receives a reply with the information that you are currently out of office or that your reply may be delayed. Automatic replies can also contain further information, such as alternative contacts.

To set up automatic replies, in the main window, click the button on the right on **Info** page of the **File** menu. The following dialog box appears. Activate the ◉ **Send automatic replies** option:

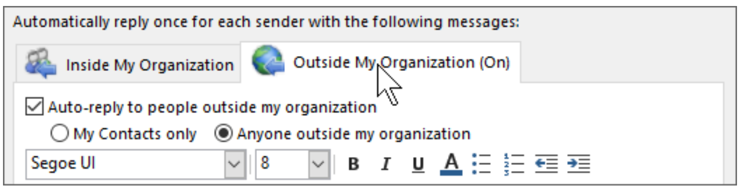


File menu, Info page



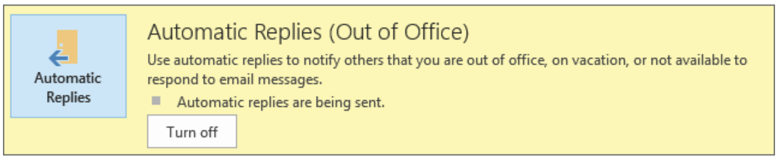
Setting up automatic replies

Type the reply text into the large white box and you can use the buttons above to format this text as well. The messages are replied to differently, depending on the sender being inside or outside your organization. For that, two tabs are available. On the **Outside My Organization** page you can also set whether the replies are only sent to senders from your **contact list** or to **anyone**:



Two tabs

Once you have made the settings and have entered the text, close the dialog box by clicking OK. On **Info** page of the **File** menu, you can now see that the **Automatic Replies** feature is switched on:



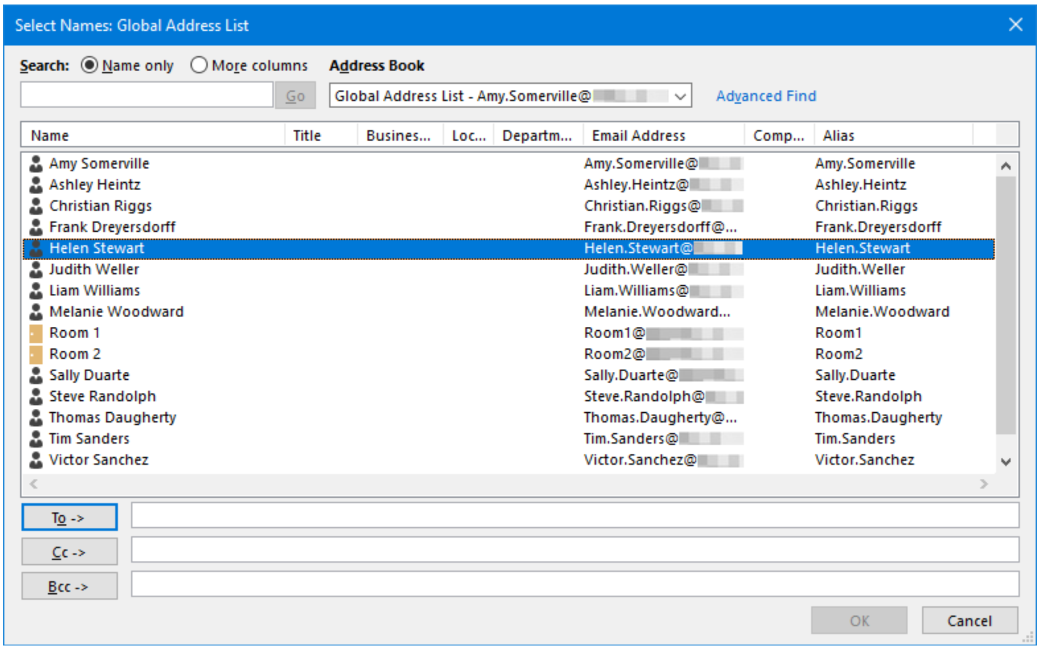
The automatic replies are switched on

Using the corresponding button you **deactivate** this feature and with a click on the large button you open the **Automatic Replies** dialog box again.

7.5 Exchange and address books

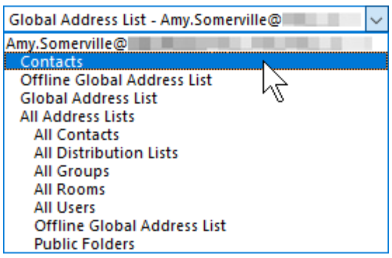
The Exchange Server manages both internal and external addresses in the so-called **Global Address List**. This means you cannot only communicate within the company but also externally via email. This address list is maintained and managed by your company's administrators. As a general rule, employees cannot change anything in the company address book. If you should discover mistakes, inform the experts who will then make the necessary changes.

To use the global address book for a new message (page 21), click the To-> button in the message window. The following dialog box appears:



A global address book

Use the arrow ▾ of the **Address Book** field to select another address book from the list shown on the right.



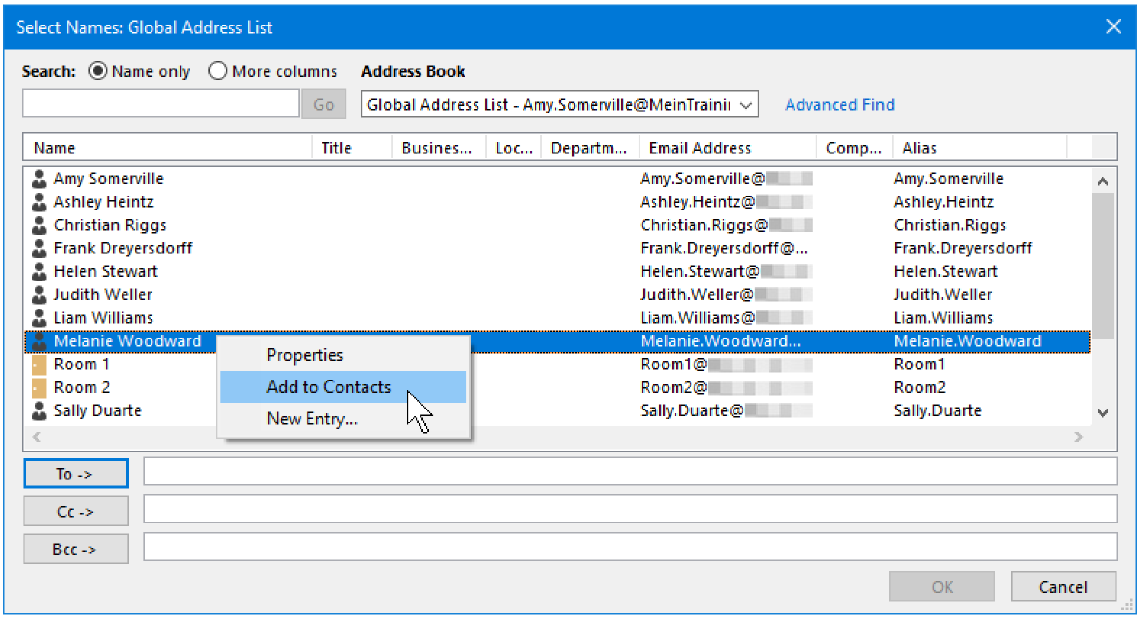
Selecting another address book

As usual, the selected name is applied as the message recipient with a click on the To-> button. The Cc-> button sets a copy recipient and the Bcc-> field contains a so-called **Blind Copy**. This means that the recipient cannot see who else is receiving the mail.

Copying contacts

Your personal contacts and the global address book are two different files which exist separately. Your contacts are not accessible to the other employees as they are stored locally. The global address book (**Global Address List**) is on the Exchange Server and is used by all company employees. However, it is possible to copy contacts from the global address list to your own contacts. This is particularly helpful if there are lots of employees in your company but you only communicate with a few of them regularly:

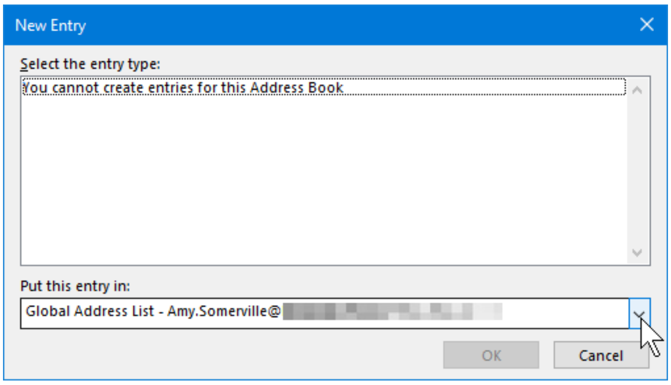
1. Select the respective contact in the global address list.
2. *Right*-click the selection.
3. In the context menu, select the **Add to Contacts** command:



Selecting from the context menu

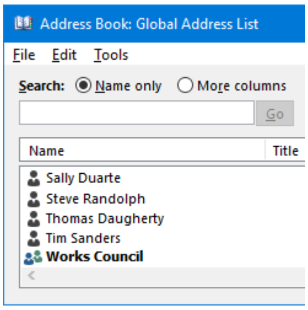
The contact has been added to your personal address book. But please note: Changes in the global address list will not automatically be applied to your personal address book! You have to maintain it yourself.

In the context menu above, there is also the **New Entry** command. You can use it to add a new entry, but *only* to your personal address book, not to the global address list!



Not possible to make a new entry in the global address list

Distribution lists (groups)



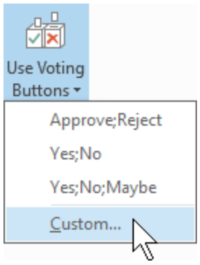
Global address list (cut-out)

Creating distribution lists in your personal address book was described from page 9 onwards. When selecting address books in Exchange, you can also include the global address lists. In the **Address Book**: **Global Address List** dialog box shown on the right, the entry **Works Council** is an example of a distribution list.

7.6 Creating polls with voting buttons

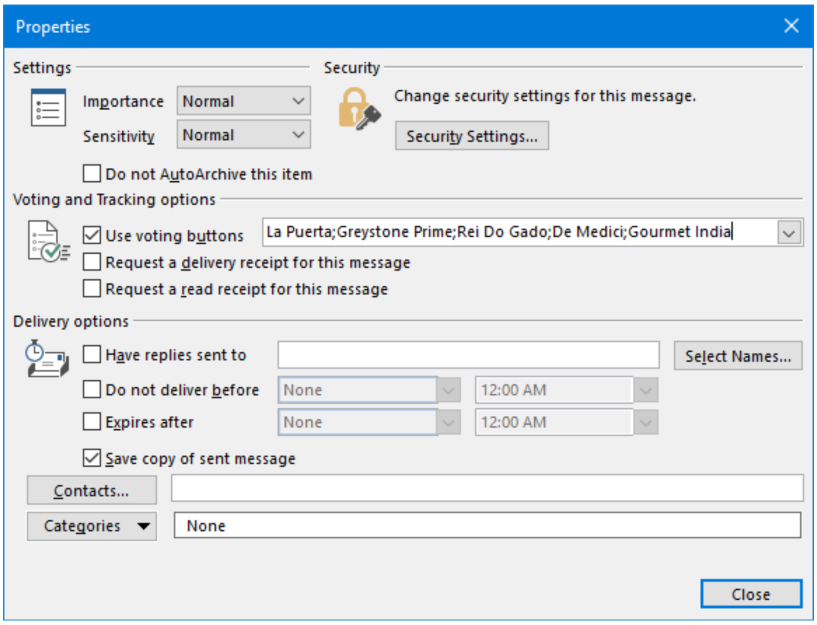
Outlook enables you to easily create polls and check their results. The uses are manifold. Let us assume for our example that you have been asked to organize a company outing and want to include your colleagues in the individual decisions, such as voting where to eat lunch based on a selection of different restaurants to choose from. This can be done by adding voting buttons to your email and sending it to the people being asked. The results of the vote will be filed in your inbox.

Adding voting buttons to an email



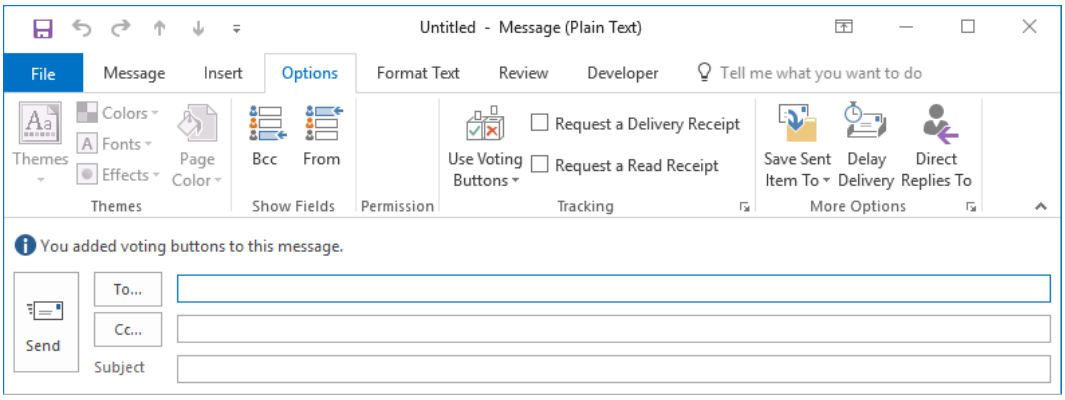
Options tab, Tracking group

1. Switch to the **Mail** view if you are currently working in another view and click the **New Email** button on the **Home** tab in the **New** group to open a new message window.
2. On the **Options** tab, in the **Tracking** group, click **Use Voting Buttons** and select **Custom** from the submenu. This option provides the possibility to assign your own names to the voting buttons.
3. If necessary, activate the ☑ **Use voting buttons** check box in the **Properties** dialog box, delete the default text in the list box behind it, and enter the required names for your voting buttons instead. Separate them with semicolons (;).



Entering your own voting buttons

4. Close the dialog box. In the message window, the information bar below the ribbon informs you that you added voting buttons.



Voting buttons were added to the message

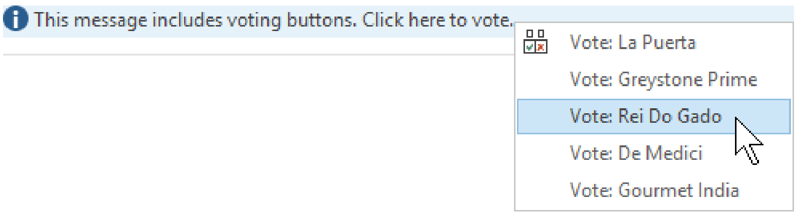
5. You can now write your email and send it to your colleagues. If you also send the message to yourself and reply to it, your choice will also be displayed in the current status (page 87).

☞ It isn't mandatory to create a new email to conduct a poll. You can also answer or forward an existing email and add voting buttons.

Responding to a poll as recipient

As the recipient of an email with voting buttons you can either vote in the reading pane or you open the email and vote in the message window.

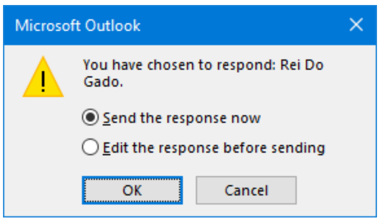
- To vote in the reading pane, click the following link in the information bar at the top and then click your choice:



- In the message window of the opened mail, click the **Vote** button on the **Message** tab in the **Respond** group and select your choice from the submenu.

Message tab, Respond group

As soon as you have made your choice, the following dialog box appears in which you can determine whether the response is to be send right away or if you want to edit it before sending.



Sending the response right away?

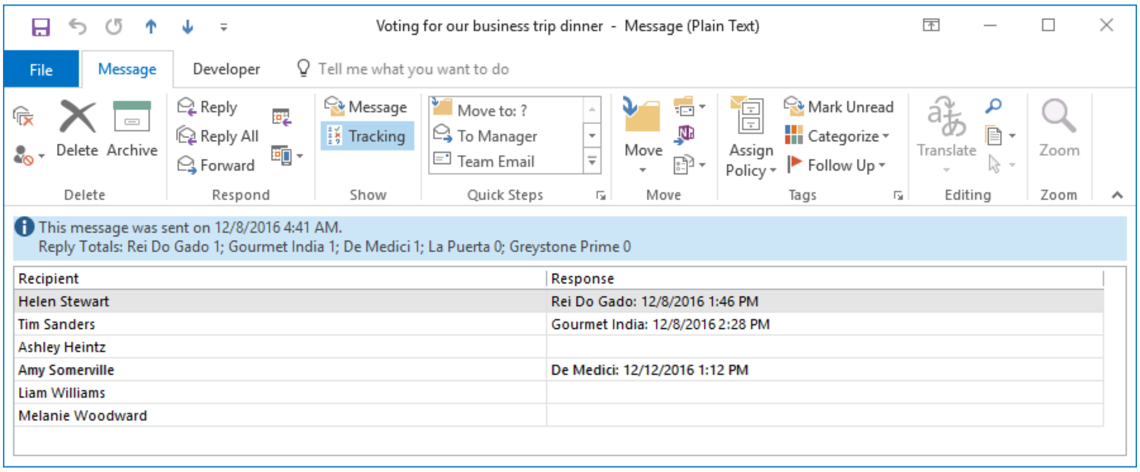
The **Edit the response before sending** option opens a new message window in which the recipient's email address and the subject have already been entered so that you only have to enter your text. Confirm your selection in the previous dialog box by clicking OK.

Reviewing the voting results

The voting results of the individual recipients are sent to your inbox as emails. After opening such a message, the information bar below the ribbon tells you what choice the sender made, e.g.

The sender responded: Rei Do Gado.

To review the current status of the vote, double-click the message you sent in the **Sent Items** folder. You can recognize it by the icon in front of the recipient's name (reading pane off or at the bottom) or to the right of the recipient's name (reading pane on the right). If you have changed the default location for sent messages, open that folder. On the **Message** tab, in the **Show** group, click the **Tracking** button. The information bar below the ribbon shows an overview of the results and below it, the current voting results are displayed in a table:



The current status of the poll

The current status of a poll is only displayed if at least one recipient has already responded.

7.7 Outlook Web App

Outlook Web App is the web-based counterpart to Outlook 2016, but with a limited range of functions. It enables you to access the Outlook views (modules) directly via a web browser (e.g. Internet Explorer or Microsoft Edge).

Switch to the **File** menu and open the **Info** page. Click the link below **Access this account on the web** which you can find to the right of the **Account Settings** button. Now, your default browser opens with **Outlook Web App**. Enter your user name and password that you have received from the administrators. Save the link to use it later independently from Outlook, for example in your favorites or in a file on an external storage device. That way you can access your Outlook wherever you are, even from computers on which Microsoft Office isn't installed.

8 Aufgaben verwalten und delegieren

In Outlook, tasks are activities that have no fixed time frame but must be carried out nevertheless. However, you can enter a target date for completing the tasks, and their priority. Moreover, you can monitor tasks and specify what percentage of each task has already been completed.

8.1 Summary from the introductory training material

New task

Activities that have no fixed time frame but must be carried out nevertheless are called tasks. In the folder pane or navigation bar, click the **Tasks** button. You can enter the task directly into the task list: **Click here to add a new Task**.

Completed tasks

Completed tasks can be marked as complete and then be deleted from the list: Activate the ☑ **Complete** check box on the left of the task line. To delete the task, *right*-click the task and select **Delete** from the context menu.

If the **Complete** check box is hidden you can add it as described on page 46.

Recurring tasks (series of tasks)

For a constantly recurring task, open a new Task form window, for example via **Home** tab, **New** group, **New Items** button, **Task** in *any view*. Press the Ctrl+G key combination or click the **Recurrence** button on the **Task** tab in the **Recurrence** group and, in the **Task Recurrence** dialog box, set the data as required.

To-do bar

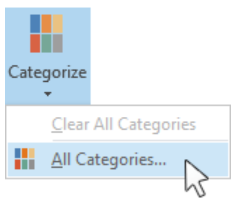
The to-do bar was introduced. It can display, among other things, a list of upcoming tasks. Double-clicking an entry in the to-do bar opens the corresponding form window.

Different views

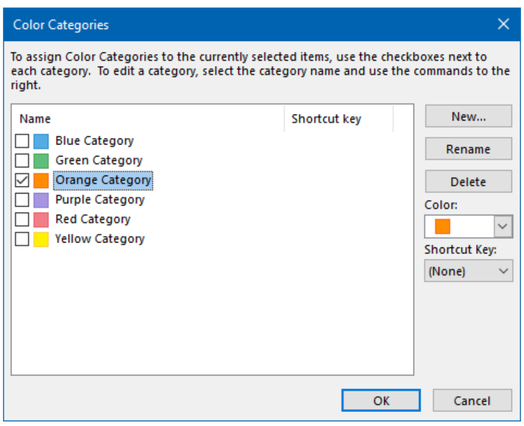
No matter what you are doing, Outlook offers you various views in all views (modules). Use the buttons in the **Current View** group on the **View** tab to choose a suitable setting from a great variety.

8.2 Categorizing tasks

With the **Catagorize** button on the **Task** tab in the **Tags** group, you apply a category to the current task in the task window. Click the button and select **All Categories** in the submenu. The following dialog box appears, in which you can also rename, delete or add new categories:

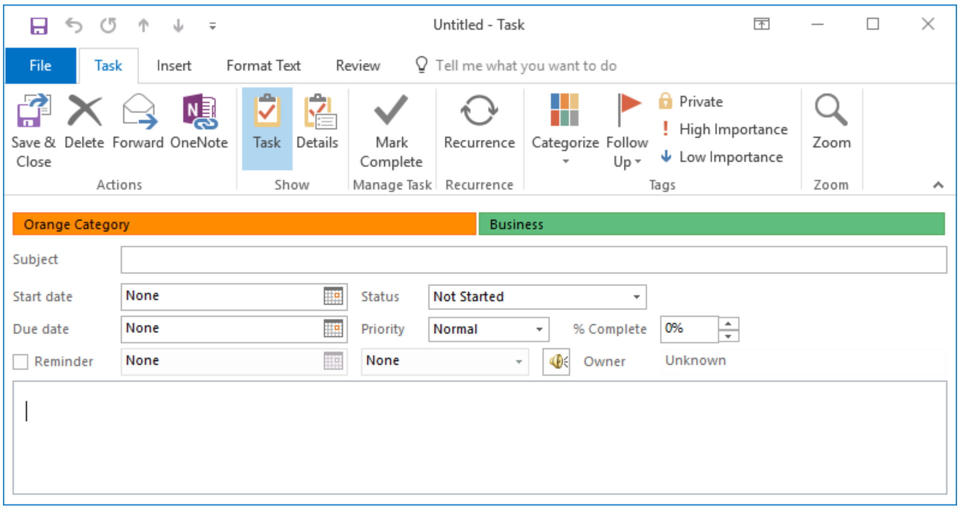


Activating the Color Categories dialog box



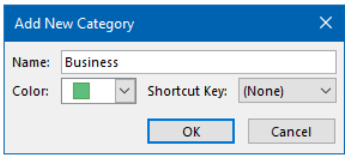
A new category is applied in this dialog box

It is also possible to apply several categories to a task at the same time:



Task with two categories

In the previous picture, we applied a new category named **Business** and the **Orange Category** to the task as you can tell from the two bands below the ribbon.

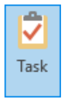


Adding a new category

8.3 Assigning tasks

If you can assign tasks to your employees, do this using the **Assign Tasks** option:

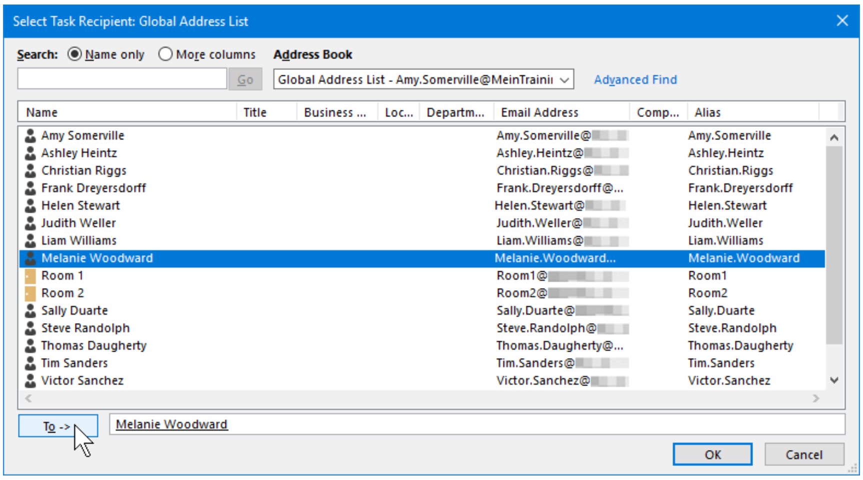
1. On the ribbon, switch to **Simple List** view (page 12).
2. Double-click the task in question to open the form window.
3. At the top of the form window, on the **Task** tab in the **Manage Task** group, click the button on the right.



Manage Task group

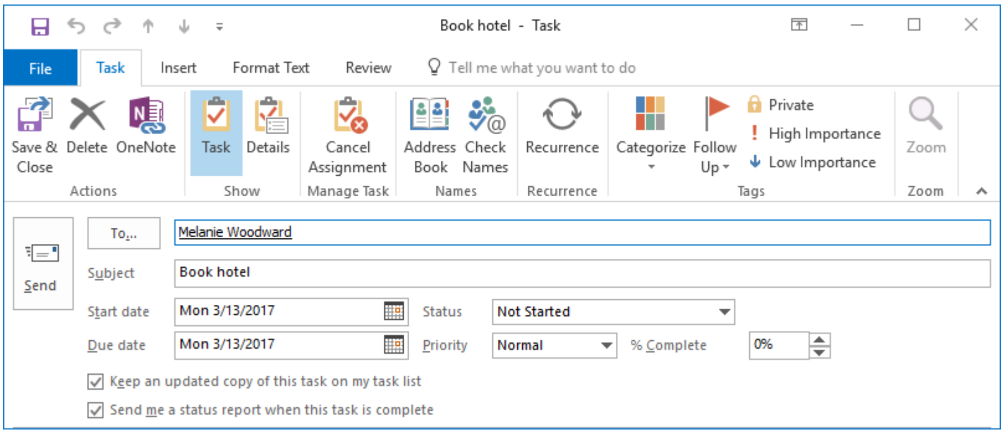
4. The form window is extended by the **To** field. There, you enter the name of the person who is to carry out the task.

   You can also click the To... button and select the task recipient from the address book. Select the name of the recipient in the following dialog box and click the To-> button. To select several recipients, hold down the Ctrl key while selecting.



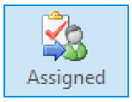
Selecting the task recipient from the contact list:

5. Close the address book by clicking the OK button.
6. The recipient has now been entered:



A task is assigned to another person

7. Click the **Send** button to send the task.

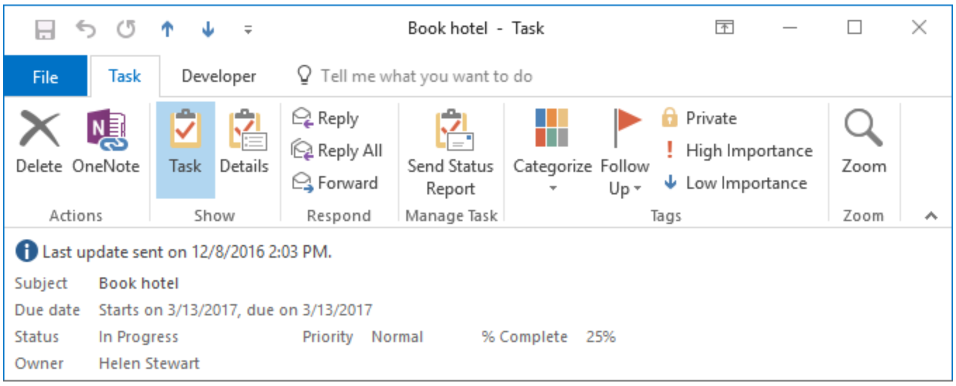


Based on the icon in the task list, you can see which tasks you have delegated. To view only these tasks, click the **Change View** button on the **View** tab in the **Current View** group**,** and select **Assigned**. Then, only these tasks will be displayed. However, it must always be assured that you do not deactivate the check mark in front of ☑ **Keep an updated copy of this task on my task list** when you assign the task (previous image).

Connected to Exchange

When you use Outlook in an Exchange surrounding you get a good overview of the tasks you have assigned to other employees and their status.

If you have not deactivated the ☑ **Keep an updated copy of this task on my task list** option when you assigned the task, you will always see the current status of the task when you call it up with a double click:

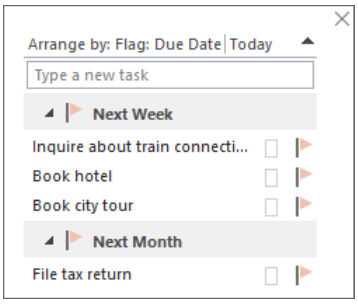


25% of the task has been completed

If you have also kept the ☑ **Send me a status report when this task is complete** option, you will automatically receive an email when the recipient has marked the task as complete. The task will also be marked as complete in the **Tasks** view.

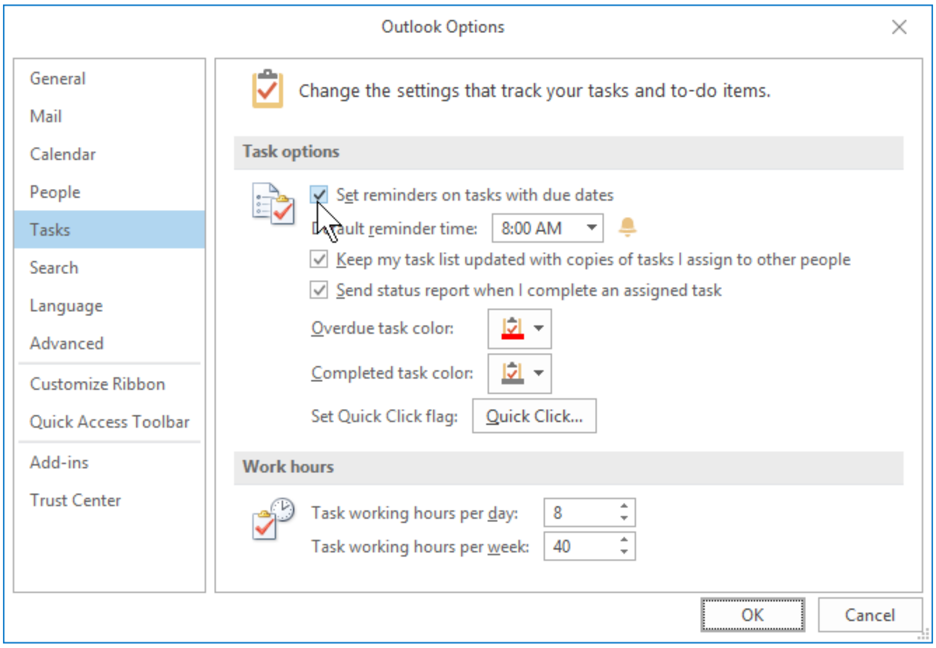
8.4 Always show tasks

With the help of the to-do bar you can always display your tasks. Use the path **View** tab, **Layout** group, **To-Do Bar**, and select ✔ **Tasks** with a mouse click as.



You can switch the to-do bar on and off

By double-clicking an entry in the to-do bar you open the corresponding form window. For tasks with an activated reminder 🔔 you will only get a message if the check box in the **Task options** area of **Outlook Options** is activated:



Activating reminders

8.5 Exercises

Assuming you are in charge of a project, and every month you perform different tasks which are related to the project:

- Controlling the progress of the task processes,
- protocolling the material costs,
- verifying the employees' time accounts and
- compiling the project-related labor costs per employee.

1. Enter the tasks and choose a due date.
2. Since the tasks recur every month, set it up as a task series.

Inhaltsverzeichnis