



FastCourse Series

Chapter 5: Working with Notes, Tasks, and Integration



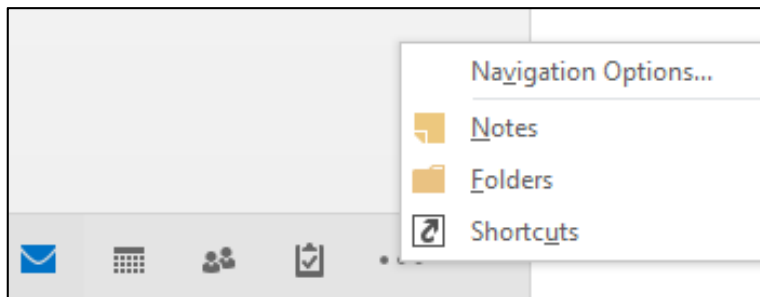
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Learning Objectives

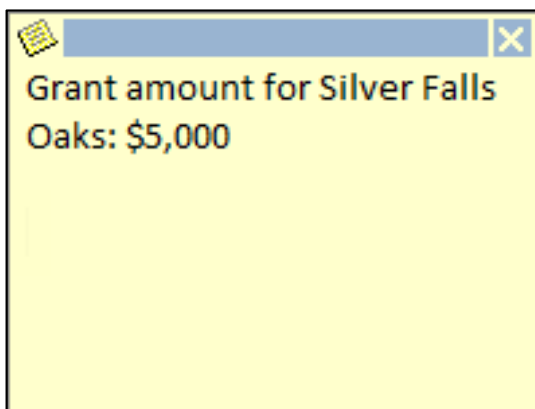
- After studying this chapter, you will be able to:
 - Work with notes
 - Create and edit tasks
 - Assign and accept or decline tasks
 - Understand the Folder list and To-Do bar
 - Integrate Outlook with Word and Excel
 - Access Outlook information on a mobile device

Working with Notes

- Store miscellaneous bits of information
- Accessed via the Navigation bar



- Used as “cheat sheets”



Working with Notes

■ Create a note

- Click the Notes button
- Type the text
- Click Close

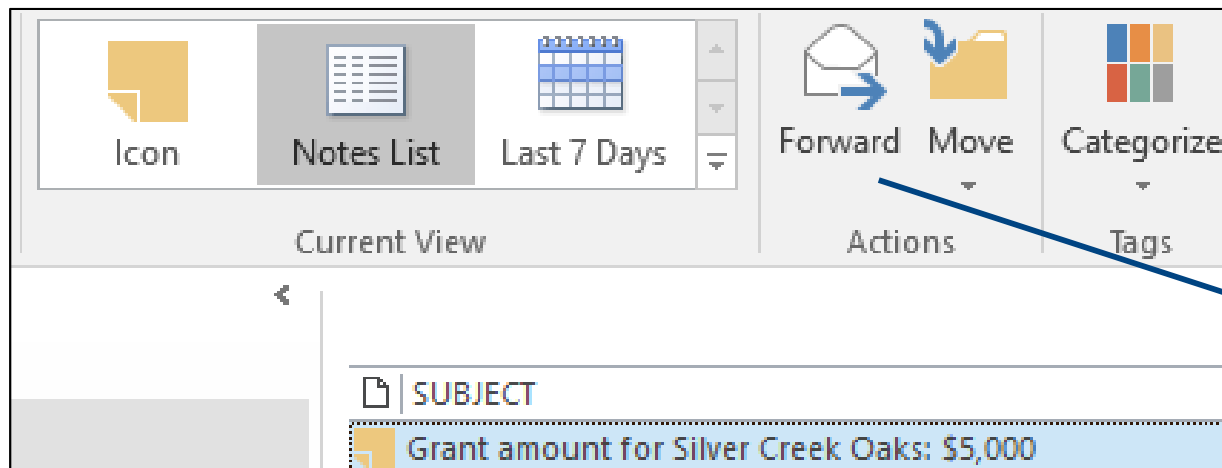
■ Edit a note

- Double-click the note
- Make the changes
- Click Close

Note Views

■ Three standard views

➤ Icon, Notes List, Last 7 Days



Share your note

Note! You can copy a note onto your Desktop, but remember that when you close Outlook, the note closes as well.

Working with Tasks

- Created in the Task window using the Tasks button on the Navigation bar
- Appear in the To-Do list
- Contain due dates
 - Set reminders for tasks
 - Schedule time on the calendar to work on a task

Using the Tasks Window

- Enter the task details in the task window

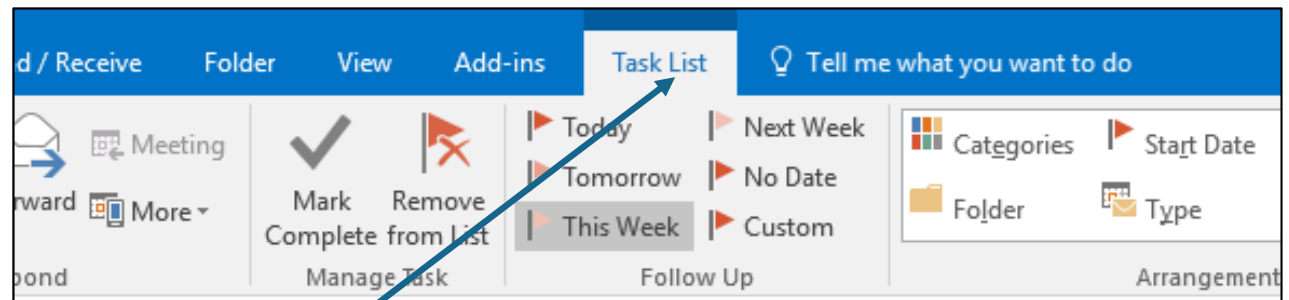
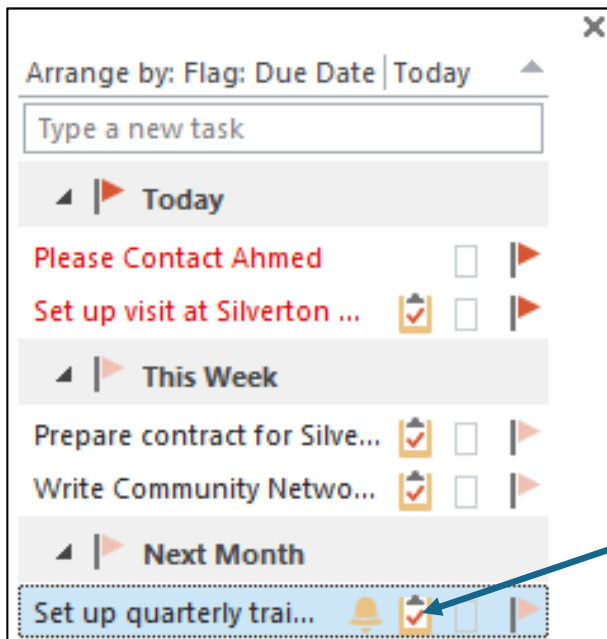
The screenshot shows a 'Tasks Window' form. The 'Subject' field contains 'Set up quarterly training schedule'. The 'Start date' field is 'Mon 8/29/2016' and the 'Due date' field is 'Sat 9/10/2016'. The 'Status' dropdown is set to 'Not Started', 'Priority' is 'High', and '% Complete' is '0%'. The 'Reminder' checkbox is unchecked, and the 'Owner' is 'Ann Hitchcock'. Below the form, there is a section titled 'Setup regular training sessions for:' with a bulleted list: 'Shelter staff', 'Staff at the Homes', and 'Basic training for dogs.'.

Annotations with arrows pointing to specific fields:

- Track the status** points to the 'Status' dropdown menu.
- Set start/due dates** points to the 'Start date' and 'Due date' fields.
- Add notes related to the task** points to the text area below the form.

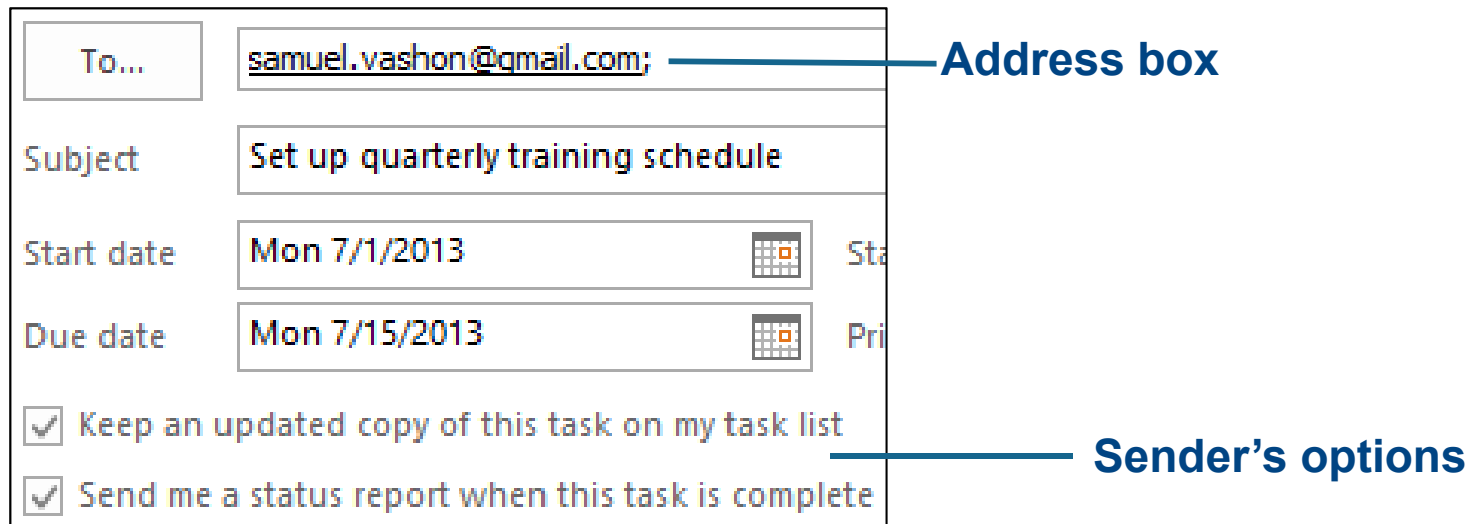
Editing Tasks

- Choose a task from the To-Do bar to open the Task Tools > Task List contextual tab



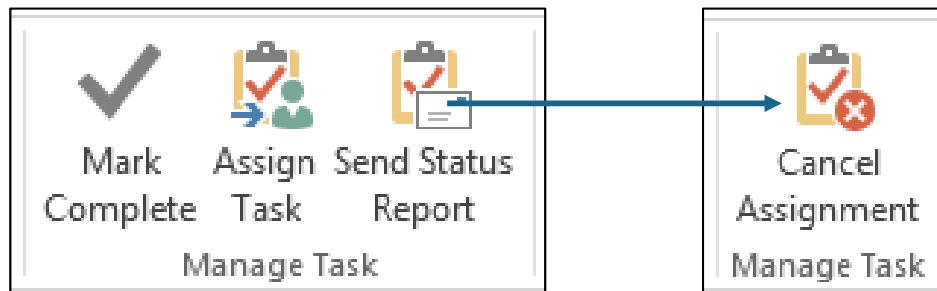
Assigning Tasks

■ Assign a task to someone else



The screenshot shows a task assignment form with the following fields and options:

- To...**: samuel.vashon@gmail.com; (labeled **Address box**)
- Subject**: Set up quarterly training schedule
- Start date**: Mon 7/1/2013 (with a calendar icon)
- Due date**: Mon 7/15/2013 (with a calendar icon)
- ☒ Keep an updated copy of this task on my task list
- ☒ Send me a status report when this task is complete (labeled **Sender's options**)



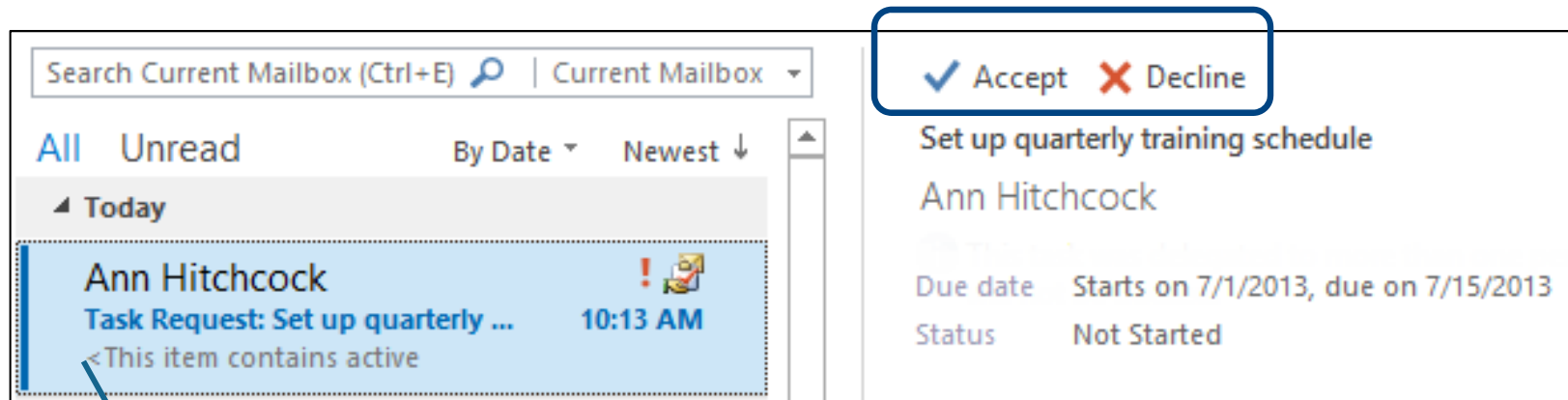
Ribbon options change when a task is assigned



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Accepting or Declining Tasks

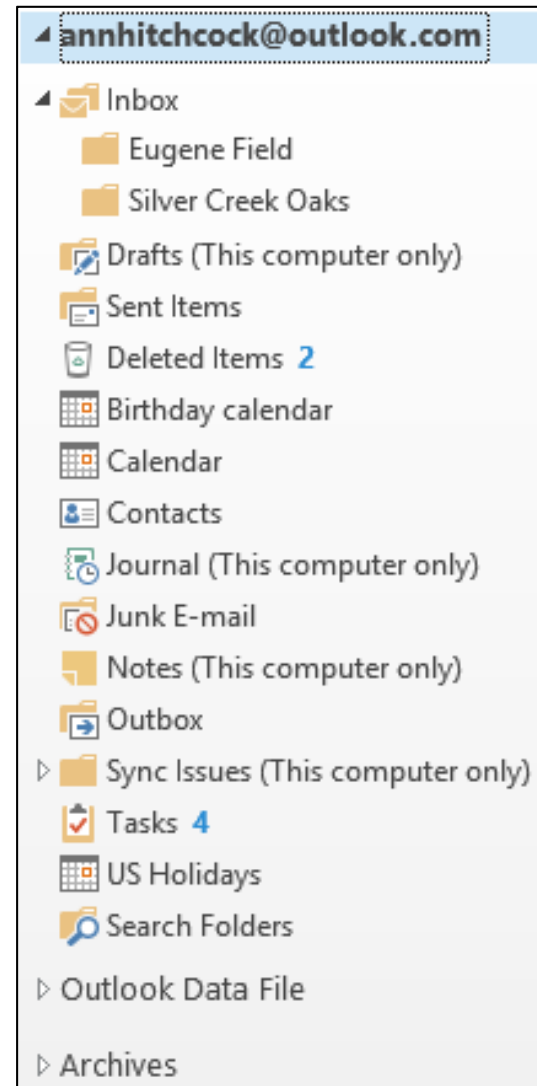
- Recipient accepts or declines your task



Task requests
appear in the Inbox

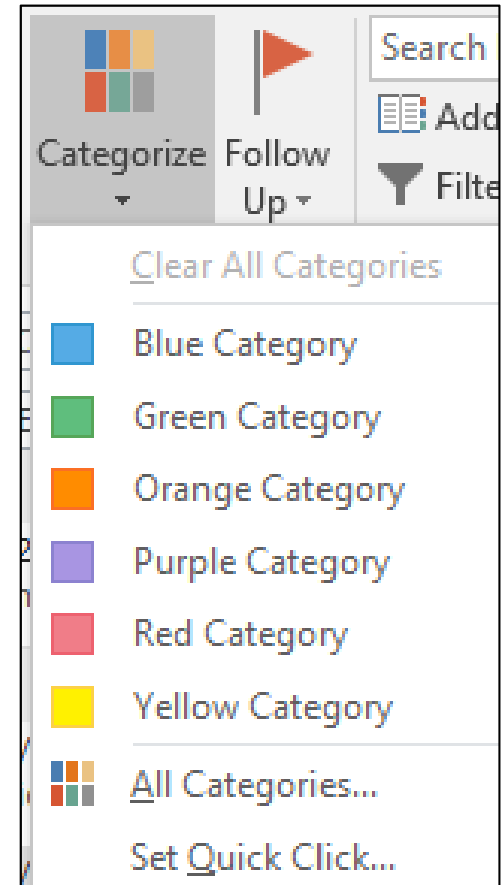
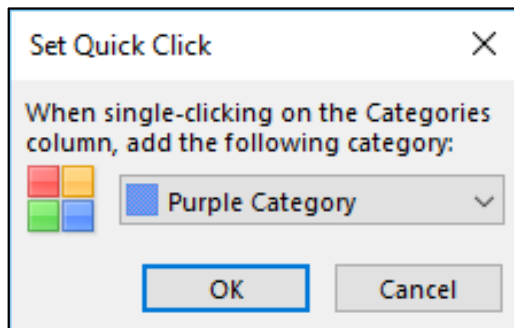
Working with the Folder List

- Displays hierarchy of folders
- Can move to another element by clicking a folder in the Folder list



Using Categories

- Similar to a paper-based filing system
- Color code items in all elements
- Set Quick Click



Integrating with Word

■ Conduct a Mail Merge with Outlook contacts

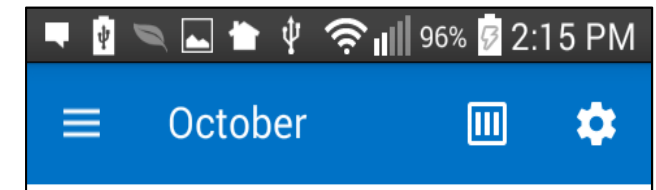
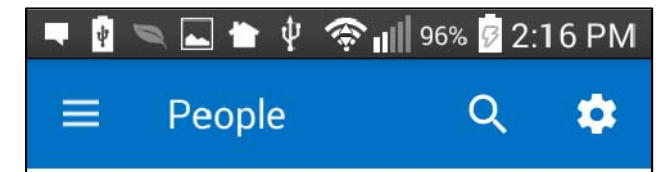
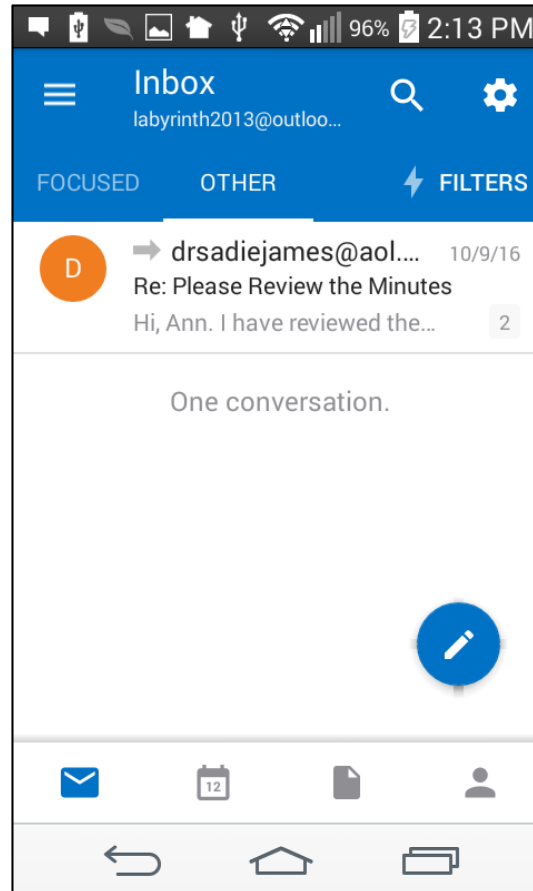
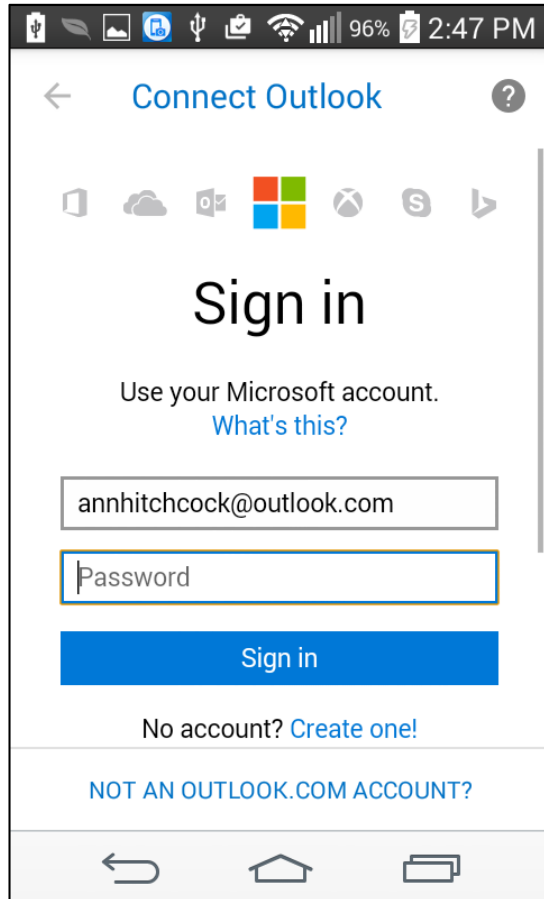
The screenshot shows the Microsoft Word interface with the **MAILINGS** tab selected. The **Select Recipients** button is highlighted, and its dropdown menu is open, showing three options: **Type a New List...**, **Use an Existing List...**, and **Choose from Outlook Contacts...**. An arrow points from the **Choose from Outlook Contacts...** option to a **Select Contacts** dialog box. This dialog box has a section titled **Select a contact folder to import:** with a list of folders: **Name**, **Contacts** (highlighted), and **Contacts**. Another arrow points from the **Contacts** folder to a **Select recipients** dialog box. This dialog box contains a table of recipients to be used in the mail merge.

This is the list of recipients that will be used in your merge. Use the options below to add to or change your list. Use the checkboxes to add or remove recipients from the merge. When your list is ready, click OK.

Data Source	<input checked="" type="checkbox"/>	Last	First	Title	Company	Address	City
Contacts	<input checked="" type="checkbox"/>	Heron	Frasier				
Contacts	<input checked="" type="checkbox"/>	James	Sadie				
Contacts	<input checked="" type="checkbox"/>	McKay	Mary		From Shelter to Home		
Contacts	<input checked="" type="checkbox"/>	Sinatra	Stephen		From Shelter to Home		

Using Outlook on a Mobile Device

- Adding an account is similar to using Outlook desktop



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