FastCourse Series

Chapter 5: Tasks, Notes, 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
  - Use the Folder list and To-Do bar
  - Integrate Outlook with Word and Excel
  - Access Outlook information on a mobile device

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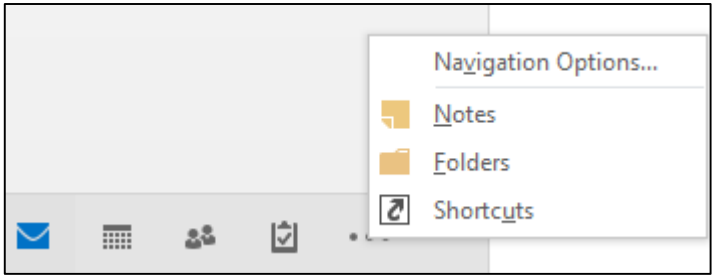
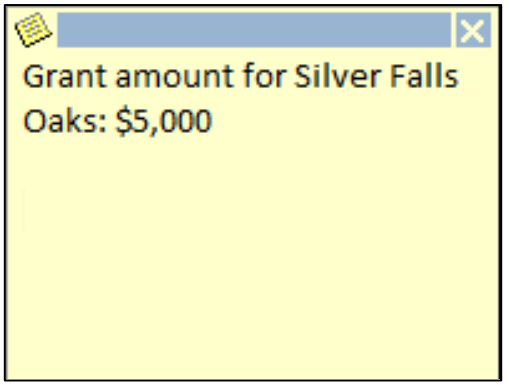
Notes

- Notes store miscellaneous bits of information.
- They are accessed via the Navigation bar.



- They can be used as “cheat sheets.”



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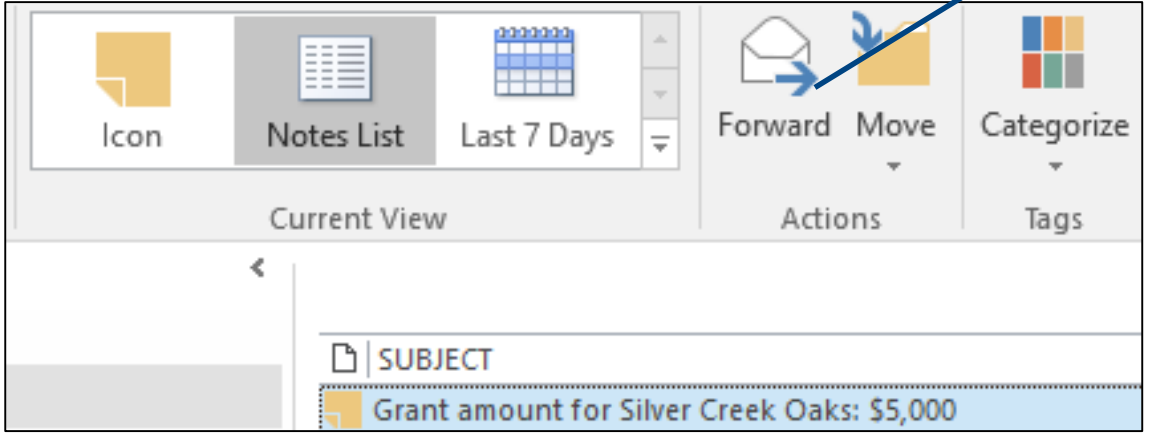
Notes Views

- There are three standard views.
  - Icon
  - Notes List
  - Last 7 Days

Click this to share your note.



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

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Tasks

- These are created in the Task window using the Tasks button on the Navigation bar.
- They appear in the To-Do list.
- They contain due dates.
  - You can set reminders for tasks.
  - You can schedule time on the calendar to work on a task.

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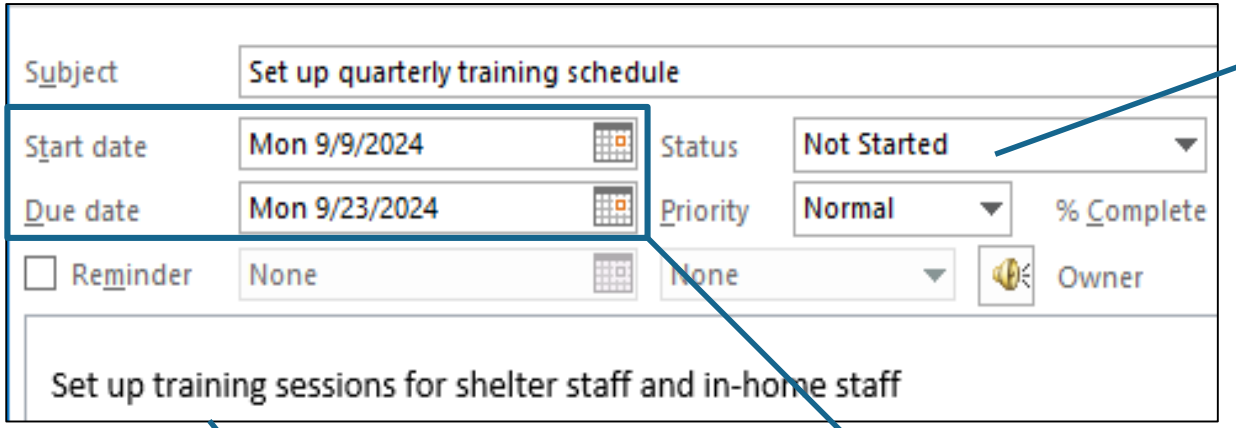
Tasks (cont.)

- Enter the task details in the task window.



Track the status.

Add notes related to the task.

Set start/due dates.

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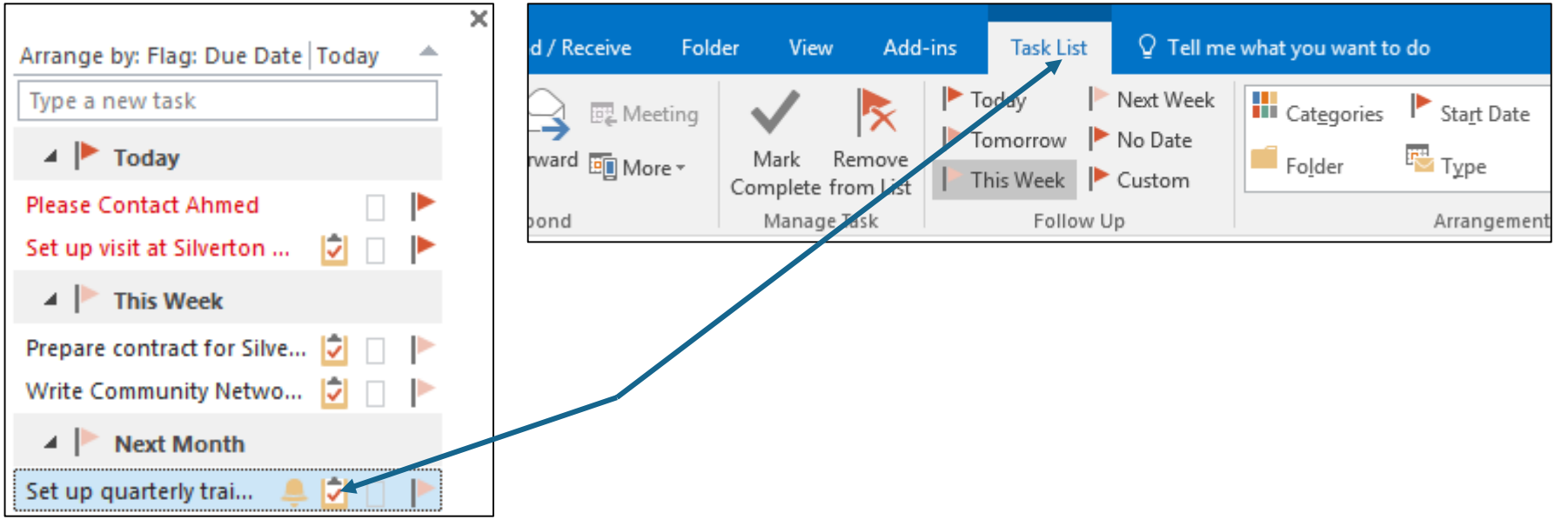
Editing Tasks

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



- The task is removed from the To-Do list when marked as Complete.

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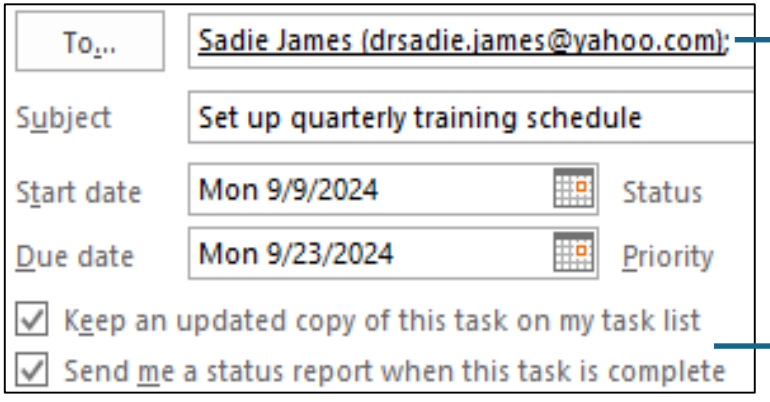
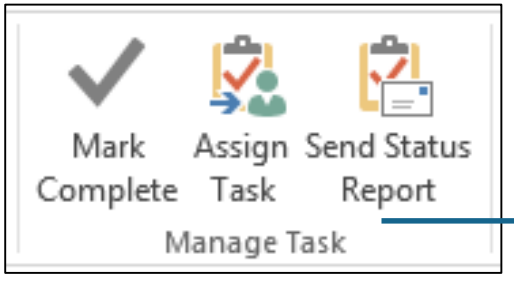
Assigning and Receiving Tasks

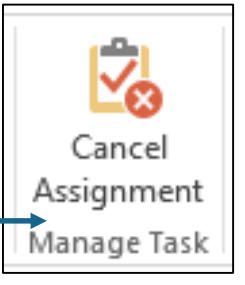
- You can assign a task to someone else.



Address box

Sender's options





The Ribbon options change when a task is assigned.

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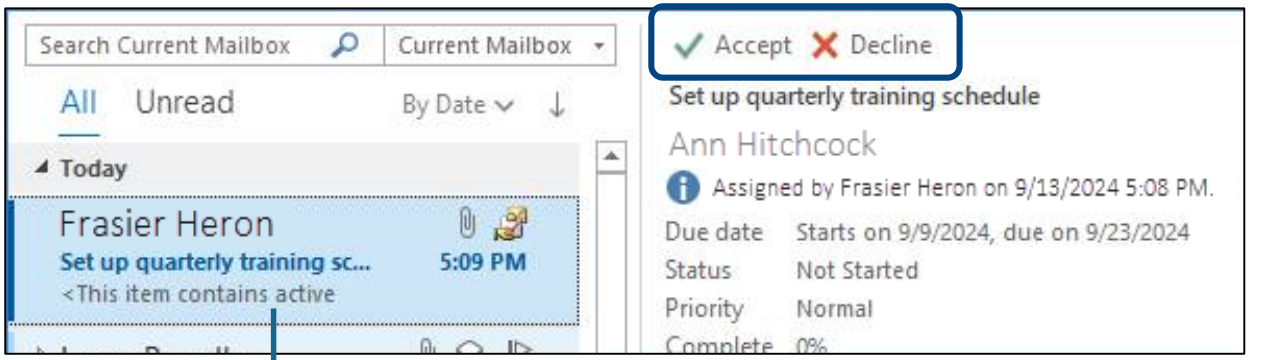
Assigning and Receiving Tasks (cont.)

- The recipient accepts or declines your task.



Task requests appear in the Inbox.

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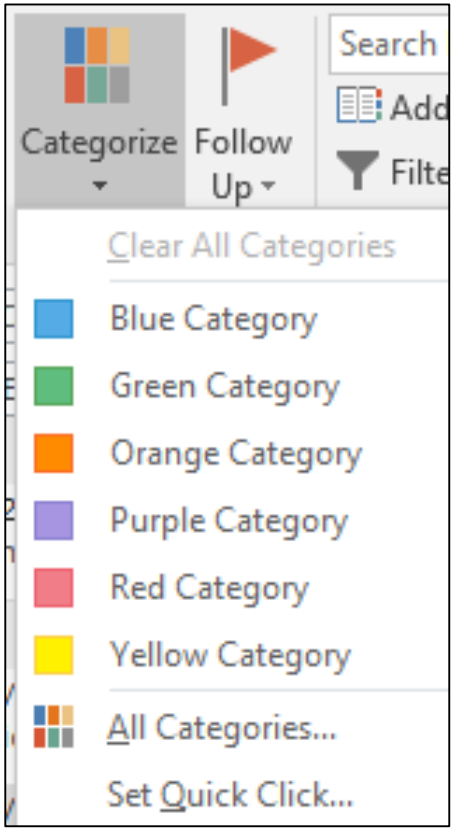
Categories

- Categories are similar to a paper-based filing system.
- You can color code items in all elements.
- You can set a shortcut key to a category.



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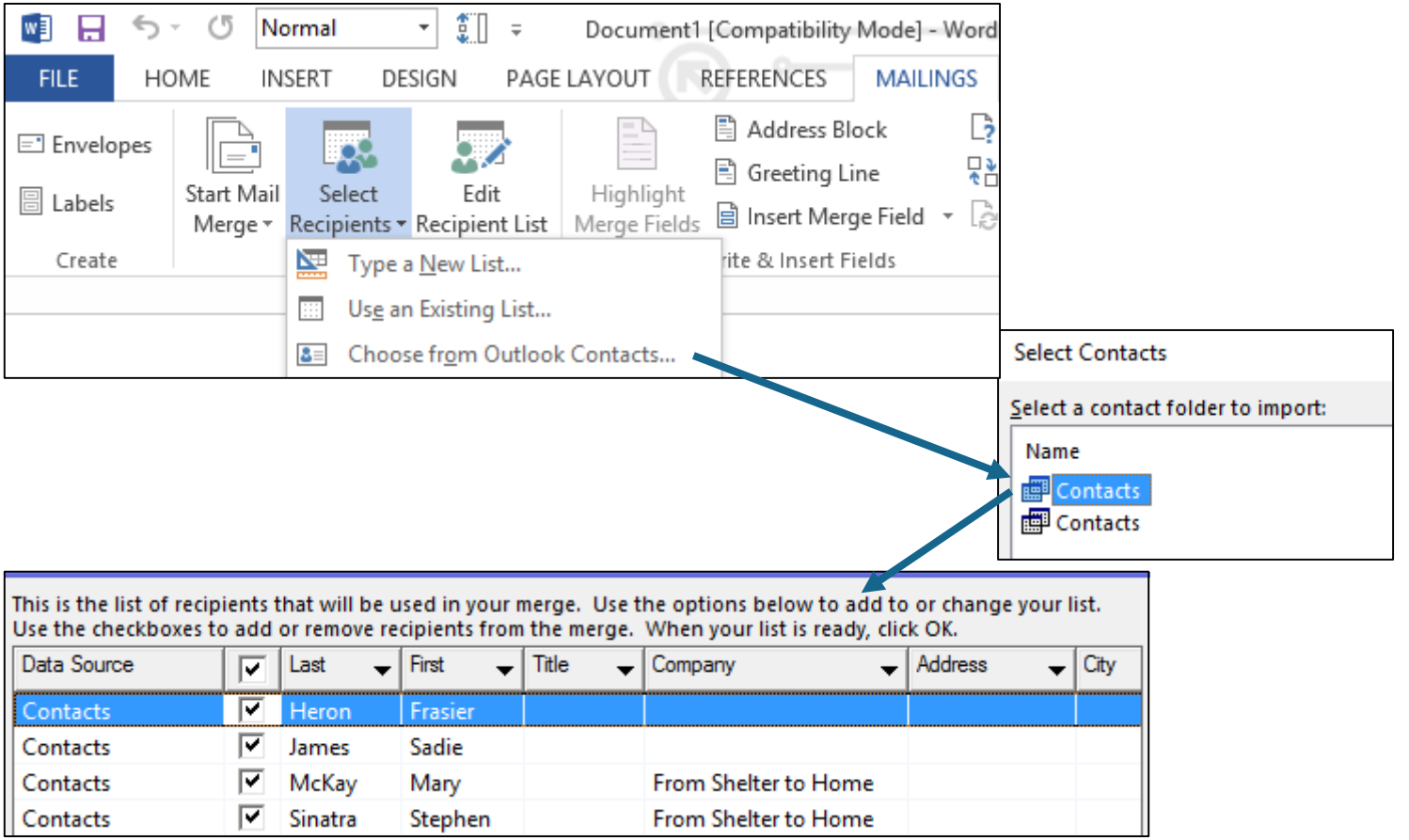
Integrating with Word and Mobile Devices

- You can conduct a Mail Merge with Outlook contacts.



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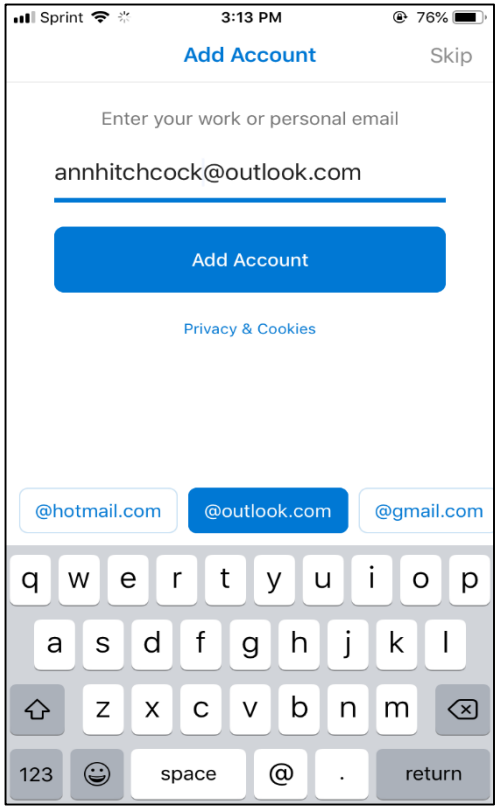
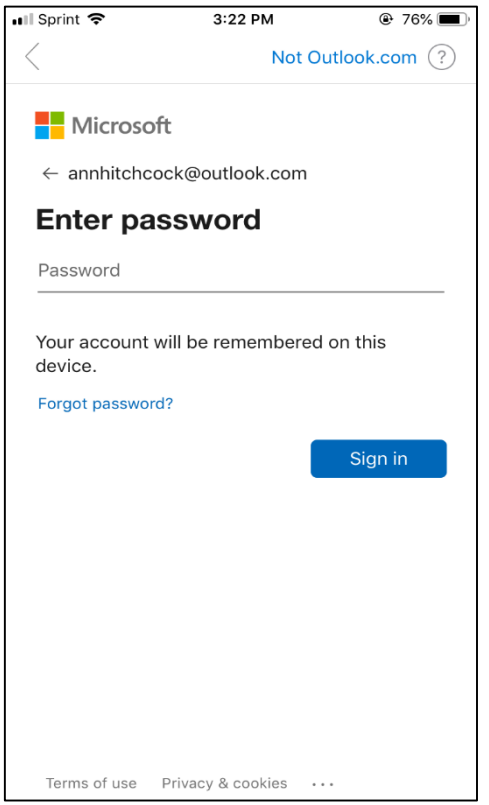
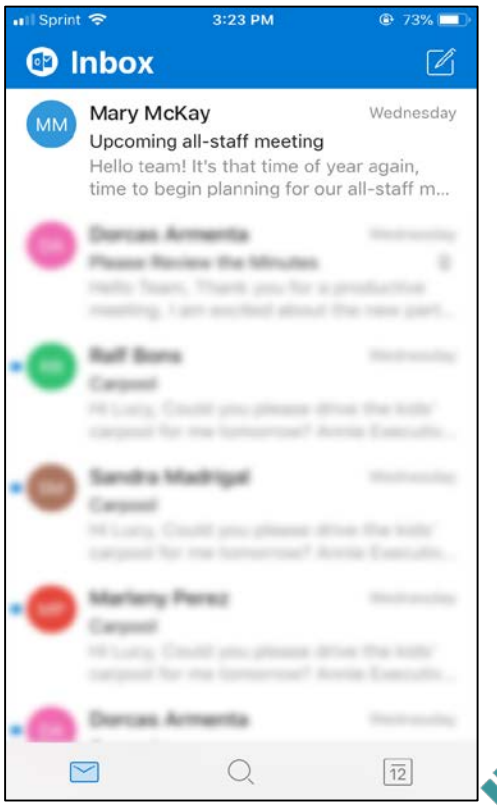
Integrating with Word and Mobile Devices (cont.)

- Using an account added to your mobile device is similar to using Outlook desktop.







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