

Section 6



Topics Covered

- Creating journal entries..... 6-2
- Viewing your journal 6-4
- Automatic journal entries..... 6-5
- Printing journal entries..... 6-9
- Creating notes 6-11



Time Required: 30 Mins



Creating Journal Entries

There are a number of ways to create journal entries depending on the type of item and whether or not it is an existing Outlook item. Some items can be recorded automatically. For instance, you can set Outlook to record all mail messages you send to or receive from a particular user, or the time you've worked on other Microsoft Office documents. Automatic recording of journal entries is covered later in this section.

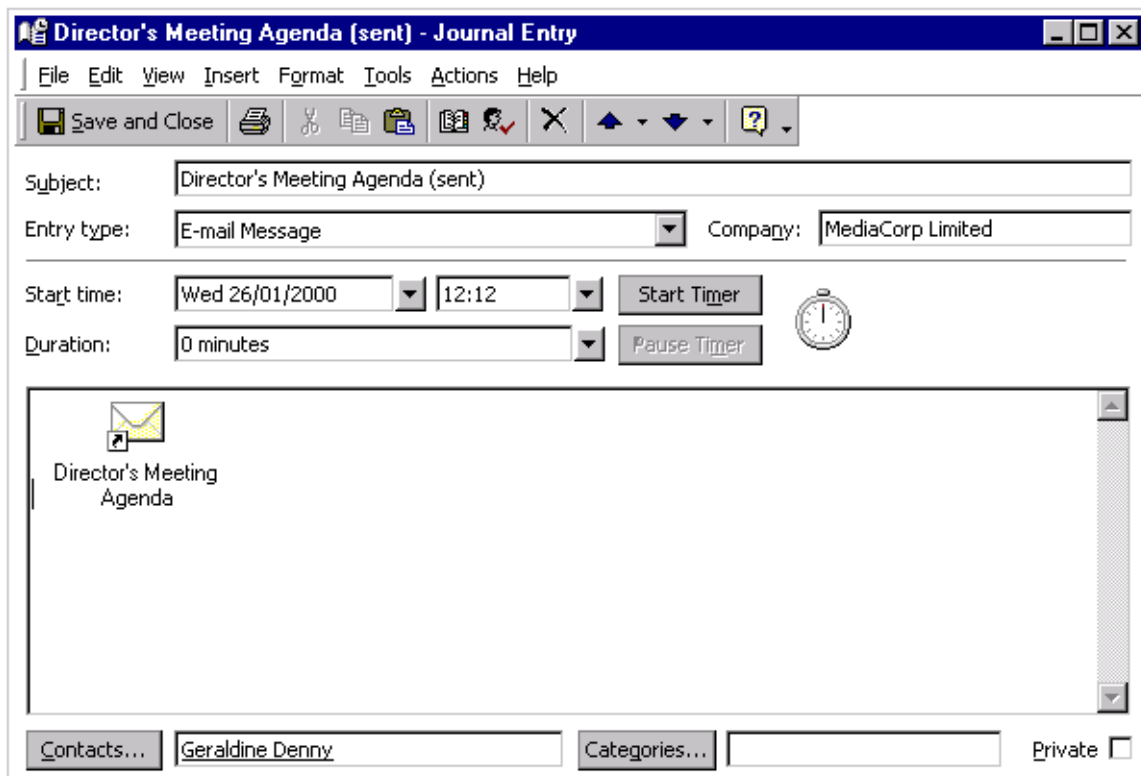
Some entries have to be created manually then added to the journal. For example, if you want to record an appointment or task in your journal, you must first create it then add it to the journal. Any existing Outlook item can be added to the journal.

If you want to add an item that doesn't already exist in Outlook and can't be recorded automatically, you can open a **Journal** window and add the details.

To Create a Journal Entry from an Existing Item

1. Display the folder containing the Outlook item to be added to the journal.
2. Select the item then drag it to the **Journal** folder in the Outlook bar and release the mouse button.

The **Journal** window will be displayed. The illustration below shows the window displayed when an existing appointment with **Geraldine Denny** was recorded in the journal. /..





Creating Journal Entries

../ To Create a Journal Entry from an Existing Item

Details from the existing item will be displayed in this window.

3. Complete the window as required:

- **Subject:** Enter a brief description of the entry in this text box.
- **Entry type:** Choose the type of entry from this drop-down list. For example, **Phone call**, **Fax** or **Microsoft Word**.
- **Company:** If appropriate, enter the contact's company name in this text box.
- **Start time:** If the item you're adding to the journal has its own start time, for example if the item is an existing appointment, these fields will be complete. Otherwise, enter or choose the required date and/or time.
- **Duration:** If the item you're adding has a start and end time, this field will be complete. Otherwise, enter a duration into this field.
- **Start timer:** If you are recording this journal entry as it happens, for example, you're starting work on an Office document, click this button to specify that you're doing so.
- **Pause timer:** If you've selected the **Start timer** button for a journal entry and you've completed the item, click this button to record the duration of the entry.
- **Contact:** If a contact is to be linked to this item, either type their name in this text box or click the **Contacts** button and choose their name from the address book.
- **Categories:** If necessary, add the journal item to a category.


4. Save and close the journal entry.

To Create a Journal Entry Using the Journal Window

1. **Menu:** Select the **File, New, Journal Entry** menu option.

 Click on the  button shown on the toolbar.

Note: If the current folder in the Outlook bar is not the **Journal** folder, this button will not be displayed on the toolbar. Instead, a button relating to the type of item that can be created in the current folder will be. In this case, click the drop-down arrow to the right of the **New...** button and choose **Journal**.

 **[CTRL] N** when the **Journal** folder is selected.

A **Journal** window will be displayed as before.

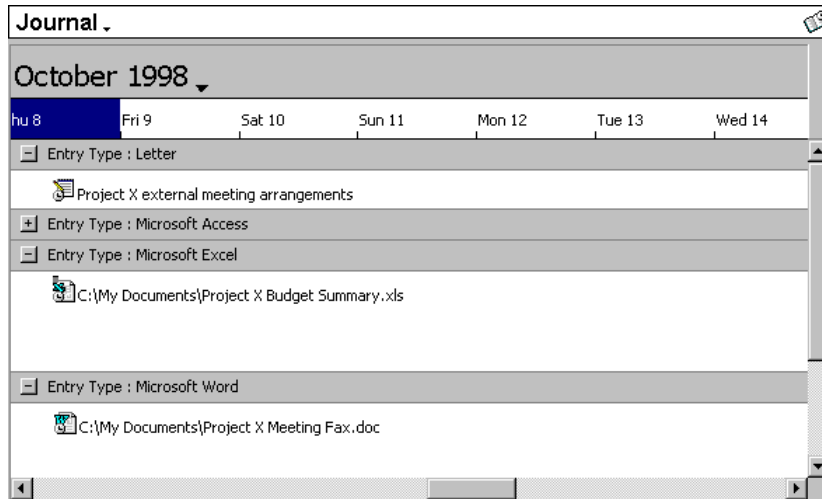
2. Complete this window as described in the previous instructions **To Create a Journal Entry from an Existing Item**.

3. Save the item and close the window.



Viewing Your Journal

When you first install Outlook, your journal will be shown in order of entry type in the form of a timeline. In the illustration below, you can see that there is a header for each type of item, followed by the items of that type:



You can change your view of the journal using the options in the **View, Current View** menu. You may, for example, prefer to view your journal by contact or category. Other options in this menu allow you to view just phone calls or items from the last seven days.

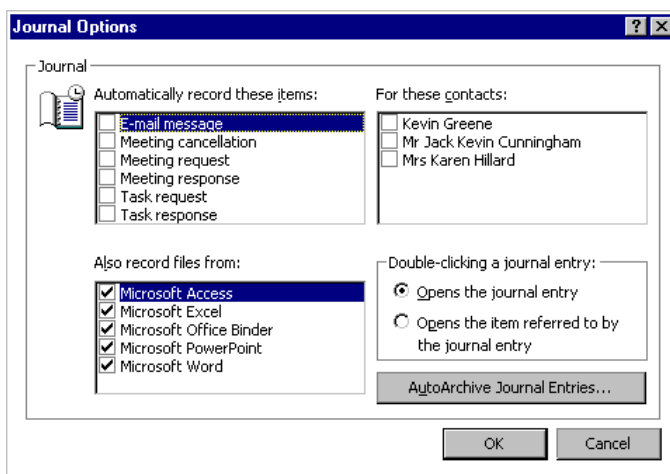


Automatic Journal Entries

Certain entries can be made in the journal automatically. You may, for instance, wish to record the time you spend working with documents from one of the Microsoft Office applications. To choose which of items you want recorded automatically, use the **Tools, Options** command.

To Choose Your Automatic Journal Entries

1. Select the **Tools, Options** command then click the **Journal Options** button to display the options relating to the journal.



2. Make the required selections in this dialogue box:

- **Automatically record these items:** Activate the relevant check box for each item type you want recorded.
- **For these contacts:** If you want to record the selected item types for particular contacts only, activate the appropriate check box(es) in this group.
- **Also record file from:** To record activities involving files from other Microsoft Office applications, choose the applications required in this group.
- **Double clicking a journal entry:** Choose which of the two available processes double clicking should carry out.

3. Select **OK**.



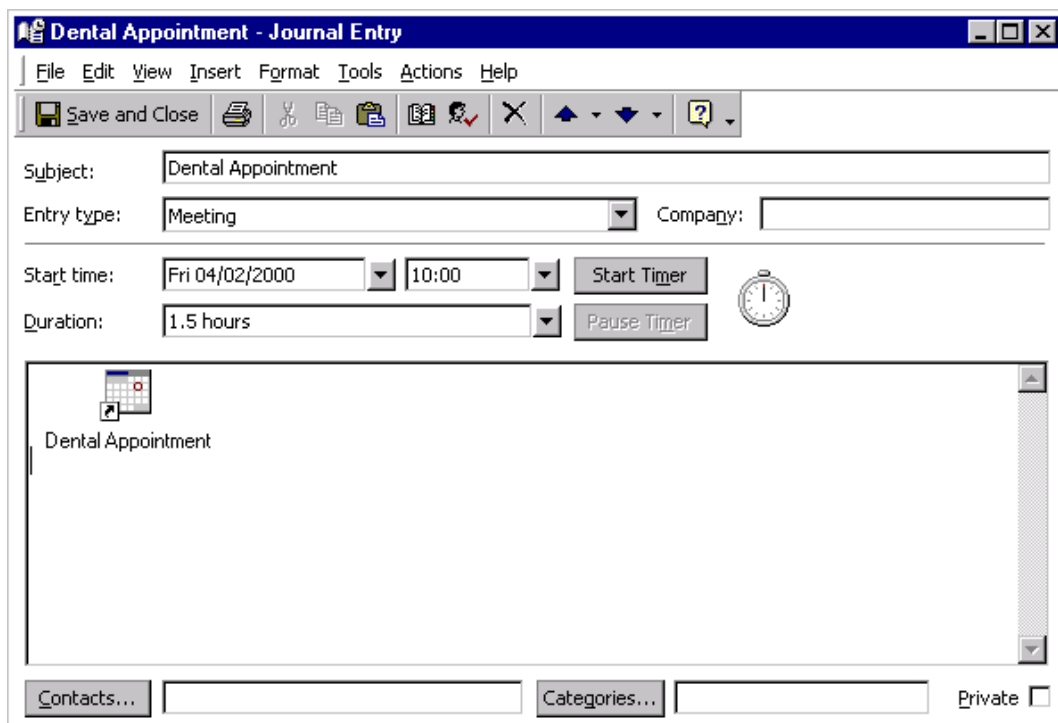
Exercise 6-1

In this exercise you'll add journal entries and explore the different views available to you.

1. Follow the instructions below to add an existing appointment to your journal.

- Display your calendar in Month view.
- Click on the **Dental Appointment** you created earlier in the course.
- Click the **My Shortcuts** group bar so that you can see the **Journal** folder.
- Drag this appointment to the Outlook bar and drop it on the **Journal** folder.

A **Journal** window containing the appointment details is displayed. Notice that the **Entry type** is **Meeting** and a shortcut icon pointing to the original appointment is shown in the comments area.



- Click **Save and Close**.

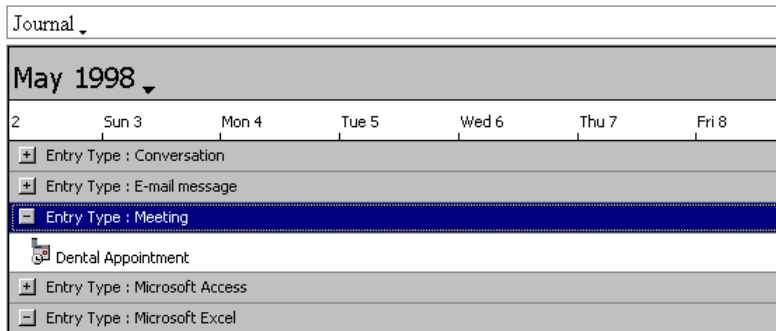
2. Display the **Journal** folder by clicking on it in the Outlook bar.

The illustrations of the journal shown in this exercise may contain different headers from those shown in yours, depending on the number and type of items stored in yours.



Exercise 6-1

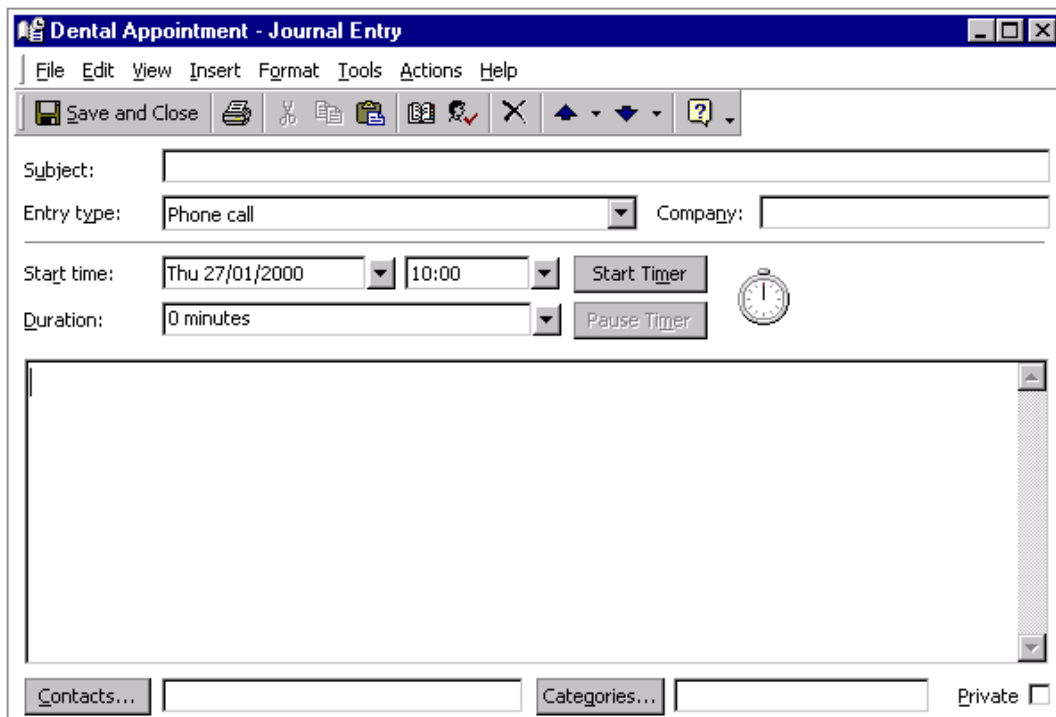
- If necessary, expand the **Meeting** section by clicking on the icon at its left side. You may also have to scroll to bring the **Dental Appointment** entry into view.



- Following the instructions below, add a new journal entry recording the fact that you spent half an hour dealing with a fax you received from Karen Hillard (a contact that you created in a previous exercise).

— Select the **File, New, Journal Entry** command.

The new entry is dated with the current date and time. It will have a type of **Phone call** by default.





Exercise 6-1

- Enter a **Subject** of **Dealing with North Dryburgh fax**
- Select an **Entry type** of **Fax**.
- Type **North Dryburgh Carpets** in the **Company** text box.
- Select **09:00** from the **Start time** drop-down list and choose a **Duration** of **30** minutes.

Dealing with North Dryburgh fax - Journal Entry

File Edit View Insert Format Tools Actions Help

Save and Close Copy Paste Print Attach Send Cancel

Subject: Dealing with North Dryburgh fax

Entry type: Fax

Contact: Karen Hillard Company: jh Carpets, Dryburgh Carpets

Start time: Thu 08/10/98 09:00 Start Timer Pause Timer

Duration: 30 minutes

- Click the **Contacts** button and choose **Karen Hillard** from the displayed list.
- Click the **Save and Close** button.

The entry is added to your journal (remember that your headers may differ from those shown below):

Tue 12	Wed 13	Thu 14	Fri 15	Sat 16	Sun 17	Mon 18
Entry Type : Conversation						
Entry Type : E-mail message						
Entry Type : Fax						
Dealing with North Dryburgh fax						
Entry Type : Meeting						
Entry Type : Microsoft Access						
Entry Type : Microsoft Excel						
Entry Type : Microsoft PowerPoint						
Entry Type : Microsoft Word						

5. Experiment with the options in the **View, Current View** menu. When prompted to do so, choose to **Discard...** each of the settings.



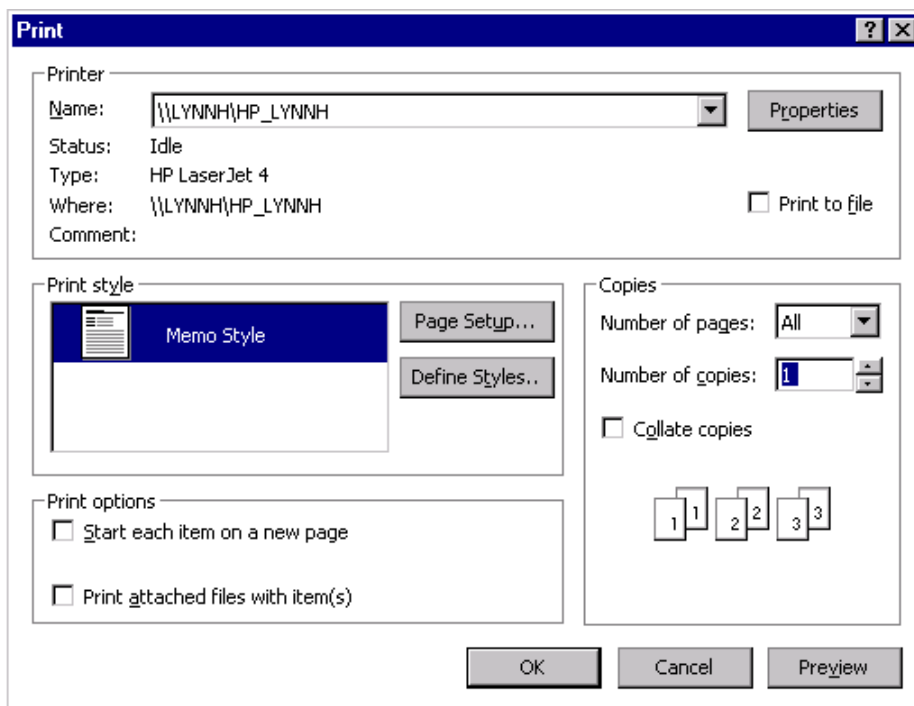
Printing Journal Entries

When you choose to print your journal entries, you can print them either in the form of a table, with each entry on a line of its own, or in the form of a memo, where each item looks the same as the **Journal** window.

To Print Journal Entries

1. Select the **Journal** folder in the Outlook bar and, if necessary, select the entries you want to print.
2. Select the **File, Print** command.

The **Print** dialogue box will be displayed.



3. Complete this dialogue box as required.
4. If necessary, preview the printed version of the journal entry then click the **Print** button to return to the **Print** dialogue box.

Note: This group may contain one or two layouts, depending on the current view options selected for the journal.

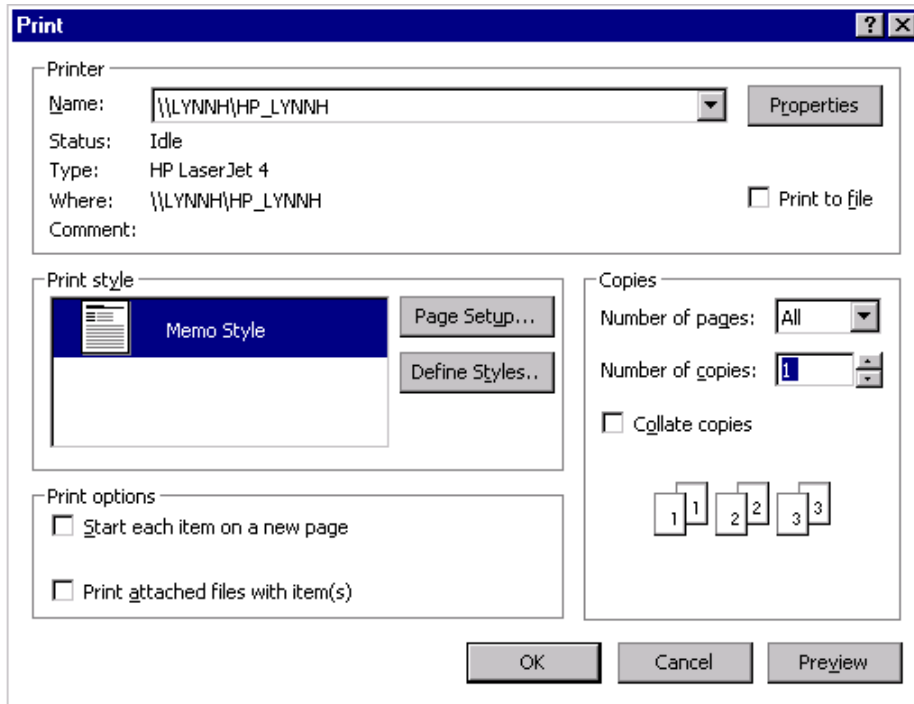
5. Click **OK** to print.



Exercise 6-2

1. Select the **File, Print** command.

The **Print** dialogue box is displayed.



2. Click the **Preview** button to view the current entry in the default view.
3. Click the **Print** button to return to the **Print** dialogue box.
4. Click **OK** to print the current entry.



Creating Notes

The **Notes** folder contains Outlook's equivalent of sticky notes. You can use them to remind yourself of anything you like, e.g. your shopping list, or ideas.

Your notes can be posted anywhere on the screen and will remain there until you close them or until you exit Outlook. They will also be shown in the Information viewer and you can change the way they are listed using the **View, Current View** menu options.

To Create a Note

1. **Menu:** Select the **File, New, Note** menu option.



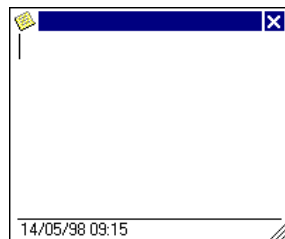
Click on the  **New** button shown on the toolbar.

Note: If the current folder in the Outlook bar is not the **Notes** folder, this button will not be displayed on the toolbar. Instead, a button relating to the type of item that can be created in the current folder will be. In this case, click the drop-down arrow to the right of the **New...** button and choose **Note**.

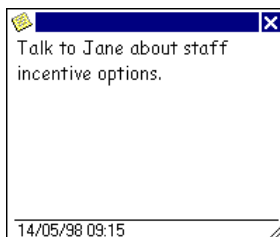


[**CTRL**] **N** when the **Notes** folder is selected.

A blank note will be displayed.



2. Type the text of your note.



Note: The **Tools, Options** command can be used to change the background colour of your notes and the font used for the text. Once you've selected the menu option, click the **Note Options** button and make your selections.

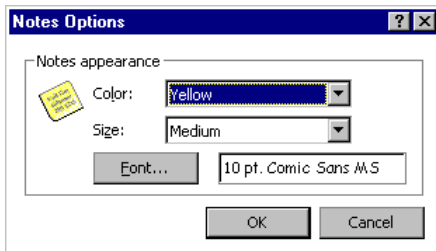
Editing Notes

To change the text shown on a note, simply click in the note and edit it.



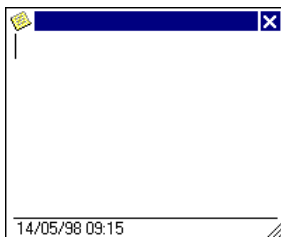
Exercise 6-3

1. Select the **Tools, Options** command then click the **Note Options** button.

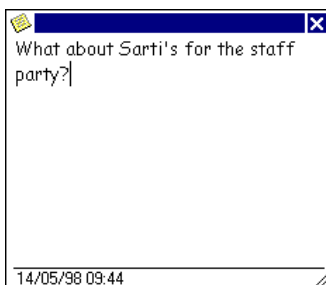


2. From the **Color** drop-down list, choose your preferred option for the background of your notes.
3. Choose **Large** from the **Size** drop-down list.
4. Click **OK**.
5. Select the **File, New, Note** command.

A note in your selected colour is displayed.



6. Create the following note:



7. Create another note to remind yourself to shop for dinner after work.
8. Display the first note and add the text **Telephone number 447 8888**



Questions and Answers

1. What is the journal used for?

2. Can you choose to record appointments automatically in your journal?

3. Which menu option would you use to change the font size used for the text in your notes?

Index

A

Automatic Journal Entries, 6-5

C

Creating

journal entries, 6-2

notes, 6-11

E

Editing

notes, 6-11

J

Journal

viewing, 6-4

Journal Entries

automatic, 6-5

creating, 6-2

printing, 6-9

N

Notes

creating, 6-11

editing, 6-11

P

Printing

journal entries, 6-9

V

Viewing

journal entries, 6-4



