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- The ultimate, in-depth reference
- Hundreds of timesaving solutions
- Supremely organized, packed with expert advice
- Companion eBook

Microsoft Outlook 2013

Jim Boyce *Support Practice Manager, Microsoft*

Microsoft Outlook 2013

Inside OUT

Conquer Microsoft Outlook 2013—from the inside out!

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- Collaborate through SharePoint libraries and files
- Encrypt your data, protect against viruses, and filter spam
- Use Outlook 2013 as a Microsoft Exchange Server client
- Communicate and collaborate using Microsoft Lync and Skype
- Work with Outlook using a web browser or mobile device

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For Intermediate and Advanced Users

About the Author

Jim Boyce is a highly regarded expert on operating systems and productivity software. He's written or contributed to more than 50 books, including *Microsoft Outlook 2010 Inside Out* and *Microsoft Outlook 2013 Plain & Simple*.

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Microsoft Outlook 2013 Inside Out

Jim Boyce

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Introduction

Welcome to *Microsoft Outlook 2013 Inside Out*. If you are a typical computer user, you probably spend at least some portion of your day in Outlook reading and creating email messages, managing your calendar, and using Outlook's other features for contacts and tasks. A growing number of people spend 60–80% of their time in Outlook. With Outlook being such a big part of your day, you likely are looking for a resource to help you make the most of Outlook. That's where *Microsoft Outlook 2013 Inside Out* comes in.

This book is intended to not only help you learn to use all of Outlook's features, but also use them *effectively*. By gaining new skills and optimizing the time you spend in Outlook, you'll be more productive and no doubt more satisfied with the application.

Who this book is for

Understanding all of the Outlook 2013 features and putting them to work is the focus of *Microsoft Outlook 2013 Inside Out*. Rather than providing just the how-to content for people who want to learn to use Outlook, *Microsoft Outlook 2013 Inside Out* also explores collaboration topics, server-side issues and administration, customized deployment, and higher-level topics geared toward the experienced user and administrator. So you get the best of both worlds: a solid explanation of Outlook's features and how to make the most of them, as well as deeper knowledge about Outlook customization, collaboration, and management.

This book makes some assumptions about the reader. You should be familiar with your Windows operating system, whether Windows 7 or Windows 8. You should be comfortable working with a computer and have a good understanding of how to work with menus, dialog boxes, and other aspects of the user interface. In short, *Microsoft Outlook 2013 Inside Out* assumes that you're an experienced computer user who wants a comprehensive look at what Outlook 2013 can do, how to put the application to work for you, and how to manage Outlook.

How this book is organized

Microsoft Outlook 2013 Inside Out offers a structured, logical approach to all aspects of using and managing Outlook 2013. Each chapter focuses on a specific aspect of Outlook 2013.

Part I, "Getting started with Outlook 2013," provides an overview of Outlook and the new features in Outlook 2013, as well as features that have been removed from or are deprecated in the new edition. You learn how to control the way Outlook starts, set up various types of accounts, and use the new interface. In addition, you learn about color categories and how to use them effectively in Outlook.

Part II, “Working with email,” covers the most common tasks people perform in Outlook—managing their email. This part of the book starts with basic email tasks and then moves on to more complex features such as text formatting, using tables, working with graphics, and using signatures. Part II also covers how to secure your email and system with digital signatures, encryption, junk email filtering, and digital rights management. You learn in detail how to manage your email using rules, alerts, and automatic responses, as well as how to find and organize your email using features such as Search Folders, Outlook folders, and more.

Part III, “Working with contacts and address books,” offers a comprehensive look at address books and contacts in Outlook. In addition to these foundational topics, Part III explains the new features in Outlook for integrating social networking services such as Facebook, LinkedIn, and SharePoint to provide a unified look at your contacts and their online information.

Part IV, “Managing your calendar and tasks,” provides detailed guidance for using Outlook’s Calendar folder and related features to manage your schedule, set up and conduct meetings, and schedule and manage resources such as meeting rooms. Part IV also explains how to use the Tasks folder and its features to manage your tasks and projects, including how to assign tasks to others.

Part V, “Collaboration,” is the place to go to learn how to integrate Outlook with other collaboration tools such as Lync and SharePoint. In addition, Part V explains how to use the delegation features in Outlook that enable an administrative assistant to manage your calendar and other items in Outlook, as well as how to share your calendar with others.

Part VI, “Security and backup,” explores a broad range of security-related topics that will help you secure your system and Outlook data. You learn about virus protection and how to control the Outlook antivirus features, as well as how to archive and back up your data.

Part VII, “Customizing Outlook and using advanced features,” moves into more advanced Outlook topics, starting with a solid overview of the ways you can customize the Outlook interface to suit the way you work and streamline common tasks. Part VII also explains how to create custom views to help you organize and analyze the information stored in Outlook. You’ll find additional customization- and development-related topics in Part VII, including how to create and use templates and custom forms, create macros and begin to program Outlook using Visual Basic for Applications (VBA), use Group Policy to customize Outlook deployment and configuration, and access your Outlook data without using Outlook.

Features and conventions used in this book

This book uses special text and design conventions to make it easier for you to find the information you need.

Text conventions

Convention	Meaning
Abbreviated commands for navigating the ribbon	For your convenience, this book uses abbreviated commands. For example, "Click Home, Insert, Insert Cells" means that you should click the Home tab on the ribbon, click the Insert button, and then finally click the Insert Cells command.
Boldface type	**Boldface** indicates text that you type.
Initial Capital Letters	The first letters of the names of tabs, dialog boxes, dialog box elements, and commands are capitalized—for example, the Save As dialog box.
Italicized type	*Italicized* type indicates new terms.
Plus sign (+) in text	Keyboard shortcuts are indicated by a plus sign (+) separating key names. For example, Ctrl+Alt+Delete means that you press the Ctrl, Alt, and Delete keys at the same time.

Design conventions

INSIDE OUT

This statement illustrates an example of an "Inside Out" heading

These are the book's signature tips. In these tips, you get the straight scoop on what's going on with the software—inside information about why a feature works the way it does. You'll also find handy workarounds to deal with software problems.

Sidebar

Sidebars provide helpful hints, timesaving tricks, or alternative procedures related to the task being discussed.

TROUBLESHOOTING

This statement illustrates an example of a "Troubleshooting" problem statement

Look for these sidebars to find solutions to common problems you might encounter. Troubleshooting sidebars appear next to related information in the chapters. You can also use "Index to Troubleshooting Topics" at the back of the book to look up problems by topic.

Cross-references point you to locations in the book that offer additional information about the topic being discussed.

CAUTION!

Cautions identify potential problems that you should look out for when you're completing a task or that you must address before you can complete a task.

Note

Notes offer additional information related to the task being discussed.

Acknowledgments

I have written many books for Microsoft Press and O'Reilly over the years, and it has always been a great experience. The great people at both organizations have made the experience what it is. I want to first thank Kenyon Brown for the opportunity to work on this series again, and for his great advice on content and direction. I also want to thank Rob Tidrow for stepping in to help with authoring. Rob has been a joy to work with over the many years I've known him, and I hope we have the opportunity to work together again in the future.

Many other people have contributed to this book as well, and it would not be possible without them. So I would also like to thank technical reviewer Vince Averello, copy editor Nicole LeClerc, and production editors Rachel Steely and Kristen Borg for their hard work and efforts.

Jim Boyce
July 2013

Support and feedback

The following sections provide information on errata, book support, feedback, and contact information.

Errata

We've made every effort to ensure the accuracy of this book and its companion content. Any errors that have been reported since this book was published are listed on our Microsoft Press site:

http://aka.ms/Outlook2013IO/errata

If you find an error that is not already listed, you can report it to us through the same page.

If you need additional support, email Microsoft Press Book Support at

mspinput@microsoft.com

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http://twitter.com/MicrosoftPress

PART I

Getting started with Outlook 2013

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CHAPTER 1

What’s new in Outlook 2013?

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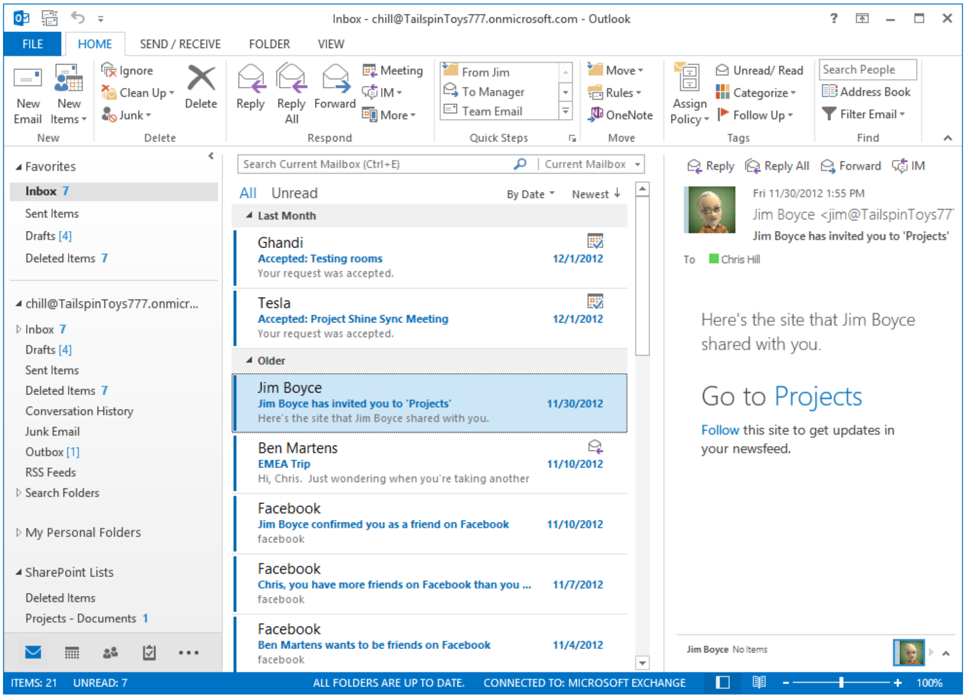
As you might expect, Microsoft has made some significant changes to the latest edition of its Office applications, and Outlook 2013 is no exception. For example, all of the Microsoft Office apps sport a new, streamlined interface in the same style as the new Windows 8 user interface. Other changes go much deeper than the interface, however. For example, Microsoft Outlook 2013 builds on the social networking features in Outlook 2010 to enable you to integrate contacts from several different social networking sites (such as Facebook) and to view social networking content from those sites within Outlook. Other changes include improved ActiveSync support, new calendar and email features, changes for Microsoft Exchange Server users, and more.

If you’re an experienced Outlook user, one of your first questions might be, “What’s new in Outlook 2013?” That’s what this chapter is all about. While not every little change to or nuance of the new Outlook 2013 interface or the new and improved features is covered here, this chapter offers a broad overview of the new features in Outlook 2013 to help you get up to speed quickly. Let’s start with the most obvious: the user interface.

A new look

The most obvious change to Outlook 2013 is the new, streamlined user interface. With the introduction of the new Windows 8–style user interface, Microsoft has introduced a new design philosophy for Windows applications. These applications have fewer interface elements, giving the applications a cleaner, less cluttered look. But while Outlook 2013 has a more simplified interface, it doesn’t have the spartan look of a Windows 8–style app. For example, Outlook 2013 still has a title bar, the ribbon, and other interface elements you’ve come to expect in a Windows app. Figures 1-1 and 1-2 contrast the new Outlook 2013 with the Windows 8 Mail app to give you a feel for the difference.


Inbox - chill@TailspinToys777.onmicrosoft.com - Outlook
FILE
HOME
SEND / RECEIVE
FOLDER
VIEW
New Email
New Items
New
Ignore
Clean Up
Junk
Delete
Delete
Reply
Reply All
Forward
Meeting
IM
More
Respond
From Jim
To Manager
Team Email
Quick Steps
Move
Rules
OneNote
Move
Assign Policy
Unread/ Read
Categorize
Follow Up
Tags
Search People
Address Book
Filter Email
Find
Favorites
Inbox 7
Sent Items
Drafts [4]
Deleted Items 7
chill@TailspinToys777.onmicr...
Inbox 7
Drafts [4]
Sent Items
Deleted Items 7
Conversation History
Junk Email
Outbox [1]
RSS Feeds
Search Folders
My Personal Folders
SharePoint Lists
Deleted Items
Projects - Documents 1
Search Current Mailbox (Ctrl+E)
Current Mailbox
All
Unread
By Date
Newest
Last Month
Older
Reply
Reply All
Forward
IM
Jim Boyce No Items
ITEMS: 21
UNREAD: 7
ALL FOLDERS ARE UP TO DATE.
CONNECTED TO: MICROSOFT EXCHANGE
100%

Ghandi
Accepted: Testing rooms 12/1/2012
Your request was accepted.

Tesla
Accepted: Project Shine Sync Meeting 12/1/2012
Your request was accepted.

Jim Boyce
Jim Boyce has invited you to 'Projects' 11/30/2012
Here's the site that Jim Boyce shared with you.

Ben Martens
EMEA Trip 11/10/2012
Hi, Chris. Just wondering when you're taking another

Facebook
Jim Boyce confirmed you as a friend on Facebook 11/10/2012
facebook

Facebook
Chris, you have more friends on Facebook than you ... 11/7/2012
facebook

Facebook
Ben Martens wants to be friends on Facebook 11/4/2012
facebook

Fri 11/30/2012 1:55 PM
Jim Boyce <jim@TailspinToys77
Jim Boyce has invited you to 'Projects'
To Chris Hill

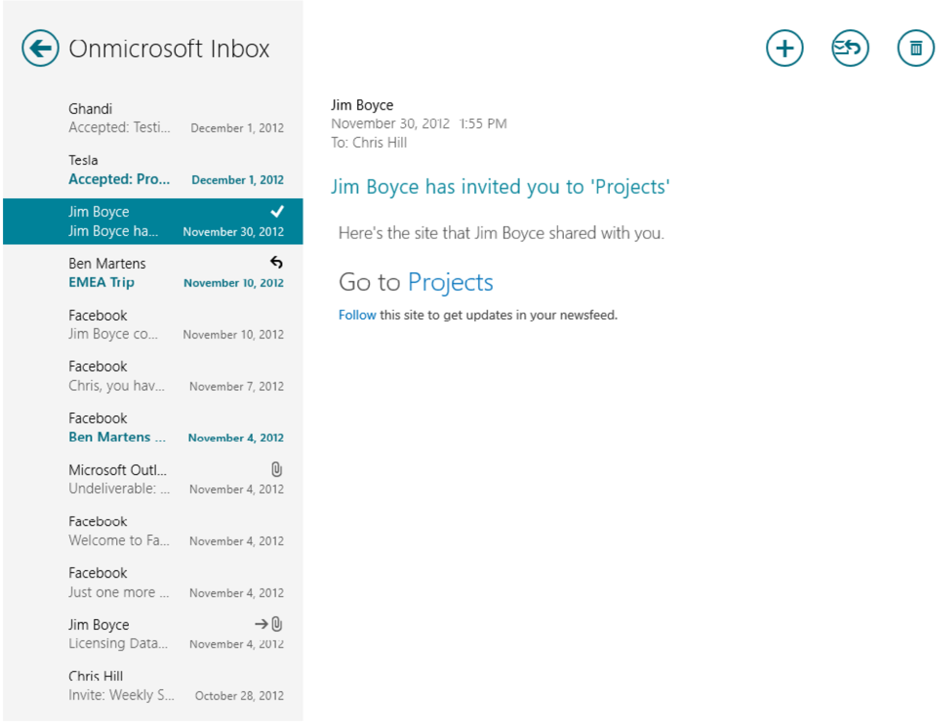
Here's the site that Jim Boyce shared with you.

Go to Projects

Follow this site to get updates in your newsfeed.

Figure 1-1 Outlook 2013 has a more streamlined user interface than previous versions.

Admittedly, the new interface might take you some time to get used to, but having used Outlook 2013 since the technical preview was released, I can tell you that it's a short learning curve. Spend a day or so with the app, and you'll feel as comfortable using it as you did the previous versions.



Onmicrosoft Inbox

Ghandi
Accepted: Testi... December 1, 2012

Tesla
Accepted: Pro... December 1, 2012

Jim Boyce ✓
Jim Boyce ha... November 30, 2012

Ben Martens
EMEA Trip November 10, 2012

Facebook
Jim Boyce co... November 10, 2012

Facebook
Chris, you hav... November 7, 2012

Facebook
Ben Martens ... November 4, 2012

Microsoft Outl...
Undeliverable: ... November 4, 2012

Facebook
Welcome to Fa... November 4, 2012

Facebook
Just one more ... November 4, 2012

Jim Boyce
Licensing Data... November 4, 2012

Chris Hill
Invite: Weekly S... October 28, 2012

Jim Boyce
November 30, 2012 1:55 PM
To: Chris Hill

Jim Boyce has invited you to 'Projects'

Here's the site that Jim Boyce shared with you.

Go to Projects

Follow this site to get updates in your newsfeed.

Figure 1-2 The Windows 8–style Mail app's interface is much more simplified than the Outlook 2013 interface.

Note

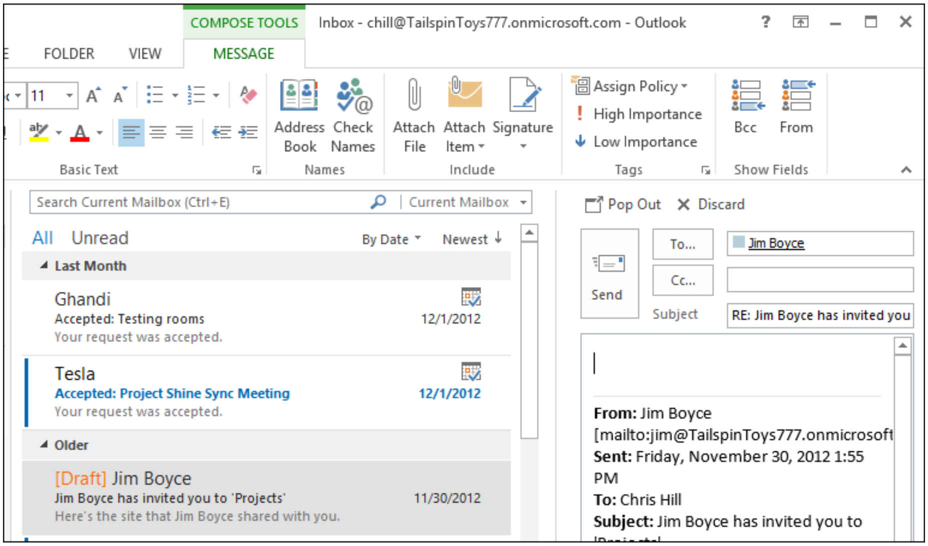
Office apps still run on the Windows desktop, even on a Windows 8 computer. This includes the Windows RT versions of the Office 2013 apps that run on the Microsoft Surface RT. Whether you run Office 2013 on a Windows 7 or Windows 8 computer, the apps will look and function the same. Only the way you start your Office apps will be different between these two platforms; these differences are noted in Chapter 2, "Starting Outlook."

Note

There is currently no version of Outlook 2013 for devices running Windows 8 RT (such as the Microsoft Surface RT). However, the Windows 8 Mail app does enable you to connect to Exchange Server, Microsoft Office 365, and other mail services. If you're looking for an email option for a Windows RT device, the Mail app makes a serviceable alternative to Outlook on those devices. Also, an RT version of Outlook might be available by the time you read this.

New ways to work in Outlook

Outlook 2013 introduces a handful of changes that give you new ways to work in Outlook. For example, as Figure 1-3 shows, you can compose a message reply right in the Reading Pane, rather than having to open the message reply in a new window. You can also pop out the message into its own window for editing by clicking Pop Out at the top of the Reading Pane.


COMPOSE TOOLS
Inbox - chill@TailspinToys777.onmicrosoft.com - Outlook
FOLDER
VIEW
MESSAGE
11
Address Book
Check Names
Attach File
Attach Item
Signature
Assign Policy
High Importance
Low Importance
Bcc
From
Basic Text
Names
Include
Tags
Show Fields
Search Current Mailbox (Ctrl+E)
Current Mailbox
All
Unread
By Date
Newest
Last Month
Older
Pop Out
Discard
Send
To...
Cc...
Subject

Ghandi
Accepted: Testing rooms 12/1/2012
Your request was accepted.

Tesla
Accepted: Project Shine Sync Meeting 12/1/2012
Your request was accepted.

[Draft] Jim Boyce
Jim Boyce has invited you to 'Projects' 11/30/2012
Here's the site that Jim Boyce shared with you.

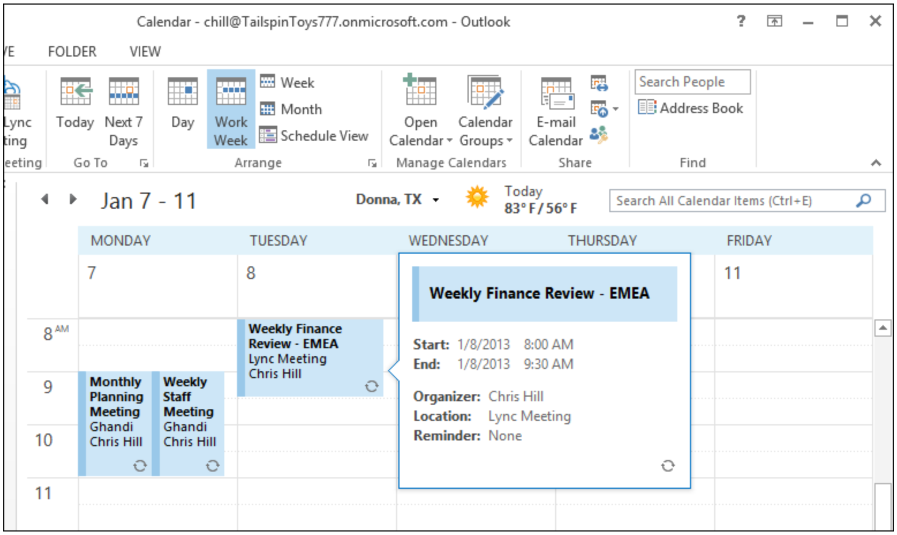
To: Jim Boyce
Subject: RE: Jim Boyce has invited you

From: Jim Boyce
[mailto:jim@TailspinToys777.onmicrosoft
Sent: Friday, November 30, 2012 1:55 PM
To: Chris Hill
Subject: Jim Boyce has invited you to

Figure 1-3 Outlook 2013 enables you to compose replies within the Reading Pane.

Composing replies inline is just one of the new ways you can work in Outlook 2013. Other new ways include the following:

- Use the blue vertical bar at the left edge of a message header to mark the message as either read or unread.
- Use the icons at the right edge of the message header to view reply status, flag a message, or delete a message.
- Hover the mouse on a calendar item to see a pop-up preview (see Figure 1-4).
- Minimize the Folder Pane (previously called the Navigation Pane), and then click All Folders in the Folder Pane to temporarily open a folder list where you can select another folder to view.
- Use the Zoom slider in the status bar to change the text zoom for the message displayed in the Reading Pane.


Calendar - chill@TailspinToys777.onmicrosoft.com - Outlook
?
/E
FOLDER
VIEW
Lync
ting
eeting
Today
Next 7 Days
Go To
Day
Work Week
Week
Month
Schedule View
Arrange
Open Calendar
Calendar Groups
Manage Calendars
E-mail Calendar
Share
Search People
Address Book
Find
Jan 7 - 11
Donna, TX
Today
83° F / 56° F
Search All Calendar Items (Ctrl+E)
MONDAY
TUESDAY
WEDNESDAY
THURSDAY
FRIDAY
7
8
11
8 AM
9
10
11

Weekly Finance Review - EMEA
Lync Meeting
Chris Hill

Monthly Planning Meeting
Ghandi
Chris Hill

Weekly Staff Meeting
Ghandi
Chris Hill

Weekly Finance Review - EMEA

Start: 1/8/2013 8:00 AM
End: 1/8/2013 9:30 AM

Organizer: Chris Hill
Location: Lync Meeting
Reminder: None

Figure 1-4 Hover the mouse over a calendar item to view a pop-up preview of the item.

Email changes

Outlook 2013 incorporates some changes for working with email and email accounts. For example, you can compose replies inline in the Reading Pane, rather than in a separate message window. Also, Outlook 2013 now runs a spelling checker on the text you type in a message's Subject field. That's a small but important change for ensuring your messages are polished and professional.

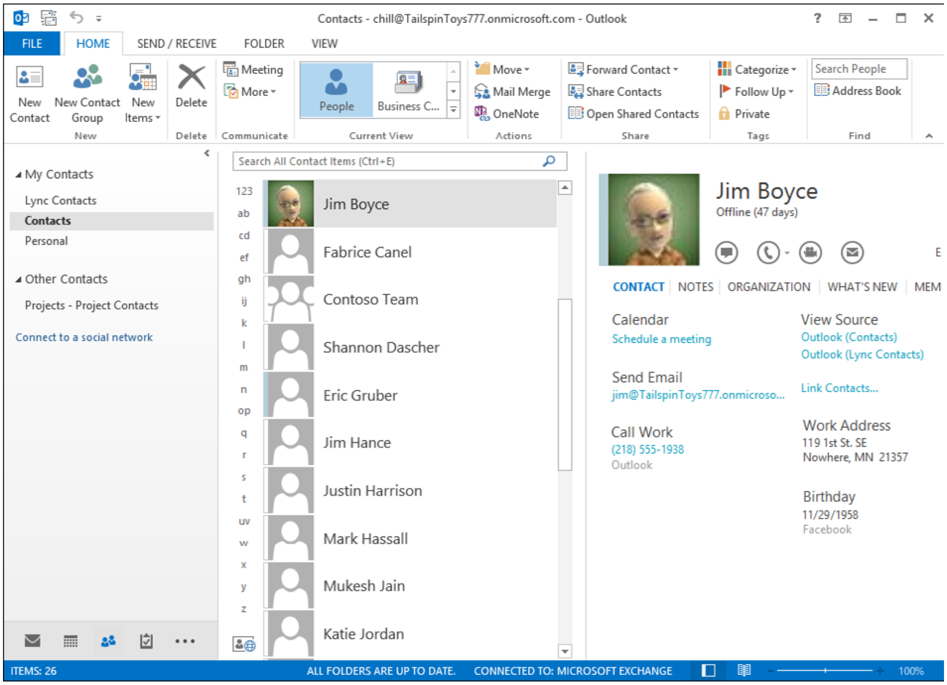
Another new email-related feature is the capability to warn you when you might have forgotten to add an attachment to a message. For example, if your message contains the word *attached*, Outlook will warn you with a dialog box before sending the message if no file is attached to the message.

Several other email-related changes in Outlook 2013 are more global in nature. These changes are described in other sections of this chapter.

The People Hub and social networking

Outlook 2013 integrates social networking features, enabling you to connect social networking accounts with Outlook. Doing so allows you to view contact information from contacts stored in those social networking accounts (such as your Facebook friends, for example). Social networking integration also enables you to view updates about your social contacts within Outlook.

The Contacts folder still exists in Outlook 2013, but it's now referred to as the People Hub, with the default view now named People. As Figure 1-5 shows, the People Hub brings together information from your contact items, as well as information for those contacts from social networking sites. In this example, the contact includes information from a Facebook account.


Contacts - chill@TailspinToys777.onmicrosoft.com - Outlook
FILE
HOME
SEND / RECEIVE
FOLDER
VIEW
New Contact
New Contact Group
New Items
New
Delete
Delete
Meeting
More
Communicate
People
Business C...
Current View
Move
Mail Merge
OneNote
Actions
Forward Contact
Share Contacts
Open Shared Contacts
Share
Categorize
Follow Up
Private
Tags
Search People
Address Book
Find
My Contacts
Lync Contacts
Contacts
Personal
Other Contacts
Projects - Project Contacts
Connect to a social network
Search All Contact Items (Ctrl+E)
123 ab cd ef gh ij k l m n op q r s t uv w x y z
Jim Boyce
Fabrice Canel
Contoso Team
Shannon Dascher
Eric Gruber
Jim Hance
Justin Harrison
Mark Hassall
Mukesh Jain
Katie Jordan
CONTACT
NOTES
ORGANIZATION
WHAT'S NEW
MEM
ITEMS: 26
ALL FOLDERS ARE UP TO DATE.
CONNECTED TO: MICROSOFT EXCHANGE
100%

Jim Boyce
Offline (47 days)

Calendar
Schedule a meeting

Send Email
jim@TailspinToys777.onmicroso...

Call Work
(218) 555-1938
Outlook

View Source
Outlook (Contacts)
Outlook (Lync Contacts)

Link Contacts...

Work Address
119 1st St. SE
Nowhere, MN 21357

Birthday
11/29/1958
Facebook

Figure 1-5 The People Hub integrates data from social networking sites with your Outlook contacts.

Outlook 2013 includes built-in support for Facebook, LinkedIn, and Microsoft SharePoint accounts, which means you can view contact information and social networking update feeds for your contacts from those services.

Note

After you add a social networking account to Outlook, the app uses the email address associated with a contact item to pull information from the social networking account, where applicable. For example, Outlook won't pull down all of your Facebook friends to the Contacts folder if you add your Facebook account. Instead, when you add a contact to Outlook, Outlook checks your Facebook contacts for one that has the same email address as the address you added for the Outlook contact. If it finds a match, it pulls down the other data for that contact from Facebook.

Folder Pane changes

The Navigation Pane in previous versions of Outlook has been renamed the Folder Pane in Outlook 2013. The Folder Pane provides all of the same features as the Navigation Pane, but it naturally has a new streamlined look to match the rest of the new Outlook 2013 interface. For example, if you choose the Compact Navigation option for the Folder Pane, the various Outlook folders are represented at the bottom of the Folder Pane by small icons, as shown in Figure 1-6.

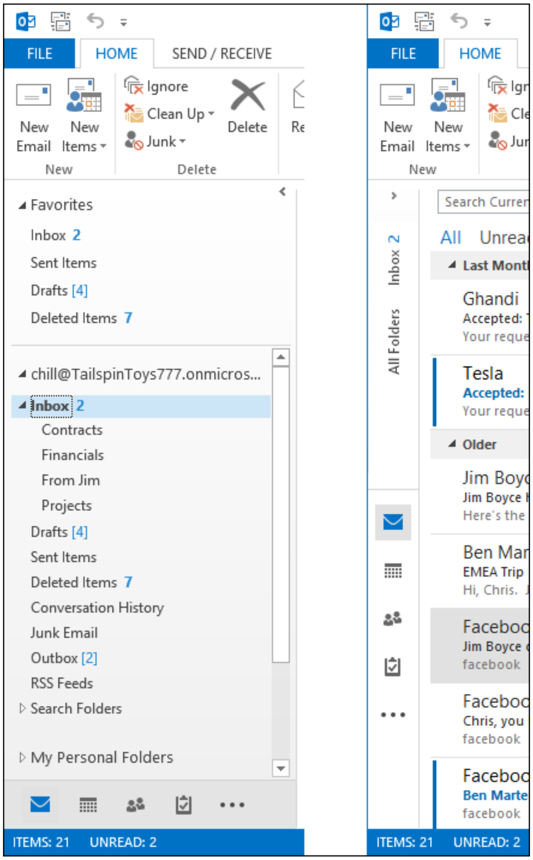
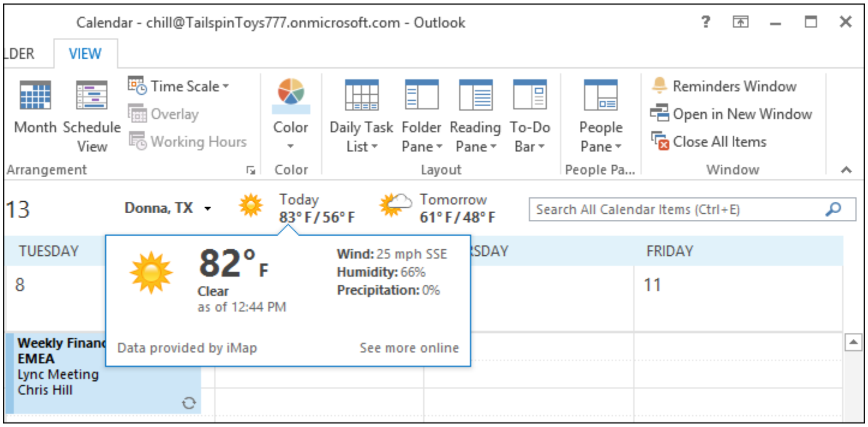

FILE
HOME
SEND / RECEIVE
Ignore
Clean Up
Junk
New Email
New Items
Delete
Re
New
Delete
Favorites
Inbox 2
Sent Items
Drafts [4]
Deleted Items 7
chill@TailspinToys777.onmicros...
Inbox 2
Contracts
Financials
From Jim
Projects
Drafts [4]
Sent Items
Deleted Items 7
Conversation History
Junk Email
Outbox [2]
RSS Feeds
Search Folders
My Personal Folders
ITEMS: 21 UNREAD: 2
FILE
HOME
Ign
Cle
Jur
New Email
New Items
New
Search Curren
All Unrea
Last Mont
Ghandi
Accepted:
Your reque
Tesla
Accepted:
Your reque
Older
Jim Boyc
Jim Boyce
Here's the
Ben Mar
EMEA Trip
Hi, Chris.
Faceboo
Jim Boyce
facebook
Faceboo
Chris, you
facebook
Faceboo
Ben Marte
facebook
Inbox 2
All Folders
ITEMS: 21 UNREAD: 2

Figure 1-6 The Folder Pane (shown here both in normal and minimized states) provides the same features as the Navigation Pane from previous versions of Outlook.

As in previous versions, you can minimize the Folder Pane to give you more space to show message headers, message content, and so on. When minimized, the Folder Pane displays as a narrow vertical bar. You can click All Folders to temporarily expand the Folder Pane to select a different folder. When in minimized view, the Folder Pane shows the icons for the primary Outlook folders as small icons arranged vertically rather than horizontally.

The Weather Bar

The Weather Bar is a new addition to the default Calendar folder views. As Figure 1-7 illustrates, the Weather Bar shows the current temperature and next day's weather for a selected location. When you hover the mouse on the weather data, Outlook shows a pop-up window with additional weather information for the selected location. You can add multiple locations and choose between them using the drop-down button to the left of the weather data.



Calendar - chill@TailspinToys777.onmicrosoft.com - Outlook
DER
VIEW
Month
Schedule View
Time Scale
Overlay
Working Hours
Arrangement
Color
Color
Daily Task List
Folder Pane
Reading Pane
To-Do Bar
Layout
People Pane
People Pa...
Reminders Window
Open in New Window
Close All Items
Window
13
Donna, TX
Today
83° F / 56° F
Tomorrow
61° F / 48° F
Search All Calendar Items (Ctrl+E)
TUESDAY
SDAY
FRIDAY
8
11
Weekly Financ
EMEA
Lync Meeting
Chris Hill
82° F
Clear
as of 12:44 PM
Wind: 25 mph SSE
Humidity: 66%
Precipitation: 0%
Data provided by iMap
See more online

Figure 1-7 The Weather Bar adds weather data for a selected location to the default Calendar folder views.

Exchange ActiveSync support

Outlook 2013 improves support for additional email services through built-in Exchange ActiveSync (EAS) support. This feature enables you to connect Outlook 2013 to Outlook.com (Hotmail), Office 365, and other email services that use ActiveSync, without the need for a separate connector or add-on. EAS also enables mobile devices to connect to these types of email services.

Quick Peek preview

Outlook 2013 adds a couple of new features to help you view information from the Folder Pane without opening the folder where the data resides. As shown previously in Figure 1-4, you can hover the mouse on a calendar item to view a pop-up preview of that item. In addition, you can preview your calendar by hovering the mouse on the Calendar icon in the Folder Pane. By default, the Quick Peek preview shows any items scheduled for the current day. You can also click a date in the preview to show the calendar items for that day, as shown in Figure 1-8. Calendar preview enables you to view upcoming calendar items without switching away from the current folder.

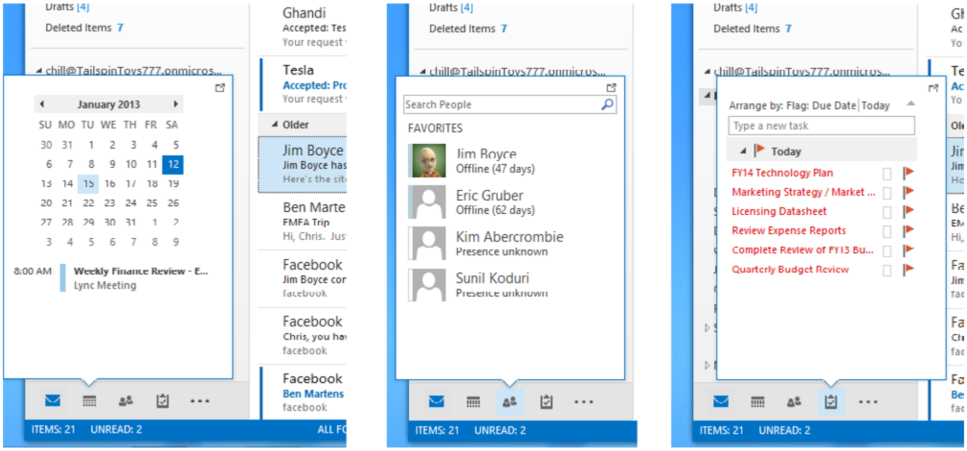
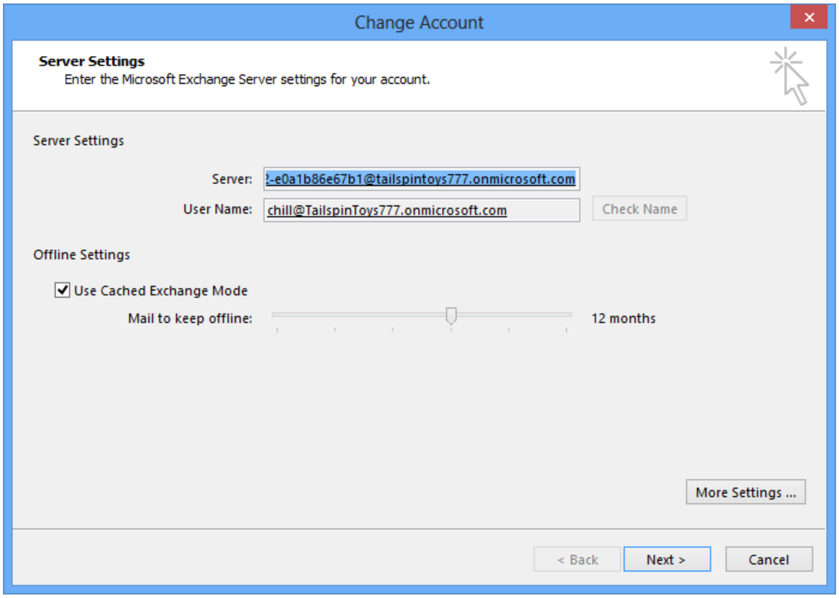

Drafts [4]
Deleted Items 7
chill@TailspinToys777.onmicros...
January 2013
SU MO TU WE TH FR SA
8:00 AM Weekly Finance Review - E...
Lync Meeting
Search People
FAVORITES
Jim Boyce
Offline (47 days)
Eric Gruber
Offline (62 days)
Kim Abercrombie
Presence unknown
Sunil Koduri
Presence unknown
Arrange by: Flag: Due Date Today
Type a new task
Today
FY14 Technology Plan
Marketing Strategy / Market ...
Licensing Datasheet
Review Expense Reports
Complete Review of FY13 Bu...
Quarterly Budget Review
ITEMS: 21 UNREAD: 2

Figure 1-8 You can preview your schedule, favorite contacts, and tasks from the Folder Pane.

The People and Tasks icons in the Folder Pane also provide Quick Peek previews. Hover the mouse on the People icon to view the contacts that you have added to your Favorites list. Hover the mouse on the Tasks icon to see a list of active tasks.

Cached Exchange Mode

Outlook 2013 implements a couple of new features to improve offline caching for Exchange Server accounts (including Outlook.com and Office 365 accounts). The new Sync Slider feature lets you configure the amount of data that is synchronized to the local offline store (.ost) file. By default, when Cached Exchange Mode is enabled for the account, Outlook will download 12 months' worth of data and automatically remove (but not delete from the account) any data that is older than 12 months. However, as shown in Figure 1-9, you can use the slider to increase or decrease the amount of data that Outlook caches. This can be particularly useful if you have a relatively large mailbox but not a lot of local storage space to hold the cache (such as on a tablet with a smaller solid state drive).



Server Settings

Enter the Microsoft Exchange Server settings for your account.

Server: -e0a1b86e67b1@tailspintoys777.onmicrosoft.com

User Name: chill@TailspinToys777.onmicrosoft.com

☑ Use Cached Exchange Mode

Mail to keep offline: 12 months

Figure 1-9 Use the Sync Slider on the Change Account dialog box to specify how much data to cache locally.

If the data you want isn't cached locally, you can still view it. For example, if you have configured your account to show only one month of data, but there are messages in your Inbox that are three months old, you can retrieve and view those older messages by clicking the link labeled Click Here to view more on Microsoft Exchange than appears at the bottom of the messages list.

Outlook also uses a new feature called Exchange Fast Access to improve the synchronization experience for users in situations where syncing messages might take a noticeable amount of time, such as on initial mailbox setup, when returning from vacation (with lots of messages waiting), and similar situations. Exchange Fast Access shows the user's updated calendar and most recent messages while it continues to synchronize the other data in the background.

IMAP

Outlook 2013 incorporates some changes in the way it supports IMAP accounts. For example, Outlook 2013 notifies you when you receive a new email message from an IMAP account. The synchronization experience is also improved, with synchronization happening in the background (messages appear more quickly than if an entire sync had to take place before your messages were displayed).

In addition, the IMAP folders appear in the Folder Pane much like they do for an Exchange Server account. Outlook shows nonroaming, local folders with the text This Computer Only next to the folder name to indicate that the folder is local rather than a part of your IMAP account's folder structure (see Figure 1-10).

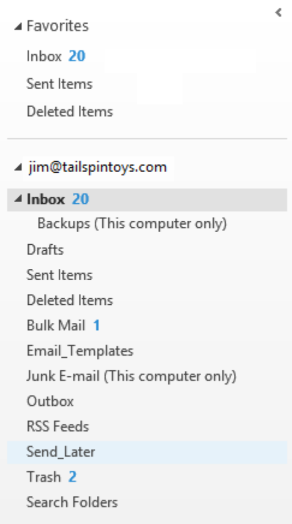

Favorites
Inbox 20
Sent Items
Deleted Items
jim@tailspintoys.com
Inbox 20
Backups (This computer only)
Drafts
Sent Items
Deleted Items
Bulk Mail 1
Email_Templates
Junk E-mail (This computer only)
Outbox
RSS Feeds
Send_Later
Trash 2
Search Folders

Figure 1-10 Local folders for IMAP accounts are identified in the Folder Pane.

OST compression

By default, when you add an Exchange Server account that uses an offline .ost file, Outlook creates a compressed .ost file for the account. The compressed .ost file can be up to 40 percent smaller than a noncompressed .ost file. You can use group policy and the Do Not Create New OST File On upgrade policy to prevent Outlook from using a compressed .ost file. The default size for the compressed .ost file is also configurable.

Note

An uncompressed .ost file can be as much as 80 percent larger than the user's corresponding mailbox size on the server because of differences between the data format on the server and the local data format.

Apps for Outlook

Apps for Outlook are add-in apps available from the Microsoft Office Store that provide specific add-on functionality to Outlook 2013. For example, the Twitter by PowerInbox app lets you follow, tweet, and direct messages to other Twitter users from Outlook. Exchange Server administrators can also deploy apps for their users (this requires Exchange Server 2013).

Site mailboxes

Site mailboxes are a collaboration feature that relies on Exchange Server 2013 and SharePoint 2013 to provide access to a shared mailbox through a common interface. A site mailbox comprises SharePoint owners and members, shared storage through an Exchange Server 2013 mailbox for messages, and a SharePoint 2013 site for documents. While the messages reside in Exchange Server, they are exposed in Outlook and in SharePoint, enabling site members to access the messages from either application.

Features deprecated or removed from Outlook

Several Outlook features have been either deprecated or removed altogether in Outlook 2013. An example of a deprecated feature is the Notes folder, which still exists but for which Outlook 2013 provides fewer configuration settings. Table 1-1 provides an overview of deprecated or removed features for Outlook 2013.

TABLE 1-1 Deprecated or removed features for Outlook 2013

Feature	Change type	Change description
Outlook Meeting Workspaces	Removed	The capability to create Meeting Workspaces is removed to provide a simpler ribbon experience.
Outlook Exchange Classic Offline	Removed	Offline mode is removed in favor of Cached Exchange Mode and EAS.
/CleanFreeBusy switch	Removed	This startup switch is removed because of the removal of the Public Folder Free/Busy feature.
Command Bars Object Model	Removed	This object model has been removed because command bars are not used in Outlook 2013.
Outlook Direct Booking	Removed	This feature is superseded by the Exchange Availability service and free/busy for resources.
Import/Export to applications	Changed	Some file types and data sources are no longer supported for import/export with Outlook 2013.

Feature	Change type	Change description
Journal	Removed	Journal and automatic journaling are removed.
Link Collection	Removed	The Link Collection object model is removed and functionality is no longer available in the user interface.
Notes customization	Changed	Outlook 2013 provides fewer options for configuring notes.
Legacy contact linking	Removed	The capability to link Outlook items to contacts, which was designed to support the Activities tab (also removed), is removed and replaced by the Outlook Social Connector and New Person Card.
Outlook Activities tab	Removed	These features are implemented by the Outlook Social Connector and People Pane.
Outlook Mobile Service	Removed	The capability to send and receive text messages is removed from Outlook 2013.
Suggested Contacts	Removed	On clean installations, this folder is not created, nor are contacts suggested. On an upgrade, the existing data is retained and is used for linking, aggregation, and searching, but contacts are not suggested.
Office.com Calendar publishing	Removed	The capability to publish calendars to Office.com for sharing is removed. Calendars can be shared from Exchange Server and through services such as Outlook.com/Hotmail.
Outlook/Exchange deliver to .pst file	Removed	Exchange accounts no longer have the capability to deliver new messages to a .pst file.
Dial-up/VPN options	Removed	Dial-up and VPN options are removed from Outlook because they are supported through the Windows operating system.
Public Folder Free/Busy	Removed	This feature is replaced by the Exchange Availability Service.
User Datagram Protocol (UDP)	Removed	This feature is replaced by an asynchronous notification method.
AutoPreview	Removed	The feature is removed, but it is still possible to configure a view to show a preview of one, two, or three lines of a message.
Outlook search through Windows shell	Removed	Outlook items do not appear in searches from the Windows shell (such as from the Start menu). To find Outlook 2013 items, search within Outlook.

CHAPTER 27

Designing and using custom forms

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Using forms effectively 720

EVEN without any custom programming, Microsoft Outlook 2013 provides an excellent set of features. In fact, many organizations don’t need anything beyond what Outlook 2013 offers right out of the box. Others, however, have special needs that Outlook 2013 does not address, perhaps because of the way these organizations do business or because of specific requirements in their particular industries. In such cases, you have ample opportunity to extend the functionality of Outlook 2013 through custom design and programming.

For example, you might need to add some fields to your message forms or your meeting request forms. Perhaps you need an easier way for users to perform mail merge operations with Microsoft Word 2013 and Outlook 2013 contact lists. Maybe you simply want to fine-tune your forms to add your company logo, special instructions, or warnings for users.

Whatever your situation, you can easily make changes to the existing Outlook 2013 forms, or you can even design new ones. The changes you make can be simple or complex: You might add one or two fields to the standard contact form, or you might add a considerable amount of program code to allow Outlook 2013 to perform custom tasks or interact with other Microsoft Office 2013 system applications. This chapter starts you on the right path by explaining how Outlook 2013 uses forms and how you can customize them to suit your needs. If you aren’t comfortable programming with Microsoft Visual Basic for Applications (VBA), don’t worry—you can accomplish a lot with custom forms without ever writing a single line of program code.

Forms are such a normal part of everything we do on computers that we sometimes take them for granted. It’s still true, however, that a lot of programs used all over the world can be accessed only with screens that provide monochrome text and puzzling menus with strange codes and submission sequences. With their versatility and ease of use, forms offer a revolutionary approach, and you can unlock their power with several mouse clicks and some solid planning. This chapter discusses using Outlook 2013 forms as part of a software solution for individual computing needs. It also examines the types of forms that you can modify and create and how the forms are created, published, and stored.

With Outlook 2013, you can employ two basic strategies for form development. The first is to use or modify a standard form. The second is to create your own form from scratch. With either strategy, it's important to remember that you're programming events that are specifically associated with the item involved, not with the Outlook 2013 application generally. In other words, when you put code behind your form, you're dealing with events related to the item that's represented by the form. For example, if you were to design a form to create a custom email message, you'd probably program a common event named *Item_Send*, which occurs when the item (the message) is sent. You couldn't program the form to respond to an event that fires (that is, occurs or executes) when the item is specifically sent from the Outbox to another user's Inbox or when the user's view changes from one folder to another. This is because in form development, you can access only the events associated with the item in question.

Overview of standard forms, item types, and message classes

Outlook 2013 uses a combination of forms, item types, and message classes as its fundamental components. Although you don't need to understand much about any of these three components to use Outlook 2013, a developer must understand them reasonably well. Obviously, the more you know, the more powerful your Outlook 2013–based solution will be.

Outlook forms

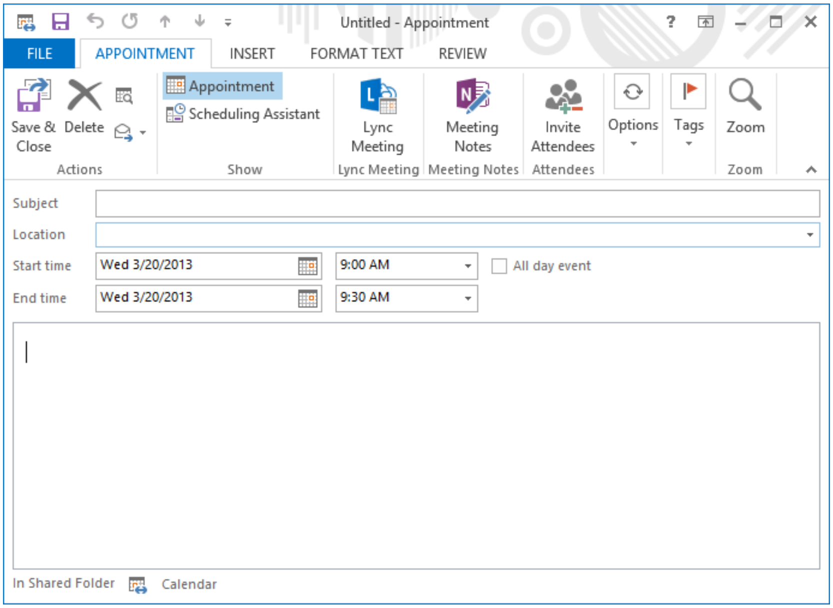
Outlook 2013 provides numerous predefined forms that you can use as the foundation of your form-based solution. These standard forms include the following:

- Appointment form
- Contact form
- Distribution list form
- Meeting request form
- Message form
- Note form

- Post form
- RSS article form
- Task form
- Task request form

As this list of Outlook 2013 forms indicates, the basic item types available in a typical Outlook 2013 installation are each represented by a corresponding form. The Outlook 2013 forms in this list match the ones that you are used to working with on a daily basis, so you are not starting with a blank slate when you want to customize a form for your own use.

Each of these forms comes with built-in user interface elements and corresponding functionality. For example, the appointment form shown in Figure 27-1 has interface elements and functions that relate to setting appointments, such as generating reminders and controlling the calendar display. The contact form, in contrast, is designed to permit the addition or modification of contact information.


Untitled - Appointment
FILE
APPOINTMENT
INSERT
FORMAT TEXT
REVIEW
Save & Close
Delete
Actions
Appointment
Scheduling Assistant
Show
Lync Meeting
Lync Meeting
Meeting Notes
Meeting Notes
Invite Attendees
Attendees
Options
Tags
Zoom
Zoom

Subject:
Location:
Start time: Wed 3/20/2013 9:00 AM ☐ All day event
End time: Wed 3/20/2013 9:30 AM
In Shared Folder: Calendar

Figure 27-1 The appointment form is one of the standard forms that you can use in Outlook 2013.

Outlook item types

Several basic item types are part of an Outlook 2013 installation. Among the Office 2013 VBA item types that you can use are the following ones specific to Outlook 2013:

- MailItem
- ContactItem
- TaskItem
- AppointmentItem
- PostItem
- NoteItem

Note

Other item types are built into Outlook 2013, including the JournalItem and DistListItem types. This book does not cover these additional types, but you can find information about them by consulting the Microsoft MSDN website (*http://msdn.microsoft.com*) and searching for these item types.

These item types represent built-in functionality. If you have ever used Outlook 2013 to create an email message or to add an appointment to your calendar, you have benefited from this functionality. Of particular importance is the fact that this functionality is accessible to you as you develop custom solutions with Outlook 2013. Outlook 2013 provides corresponding forms for each of these item types, and these standard forms are designed with behaviors that directly relate to the item types that they represent. You can extend the behaviors of these forms and use all the functions and properties of the item types, some of which are not exposed in the standard forms. In addition, you can reach beyond Outlook 2013 to incorporate the functionality of other Microsoft Office applications such as Microsoft Word 2013, Microsoft Excel 2013, Microsoft InfoPath 2013, Microsoft PowerPoint 2013, Microsoft Project 2013, Microsoft Visio 2013, and any application or control that exposes a programmatic Component Object Model (COM) interface.

Outlook message classes

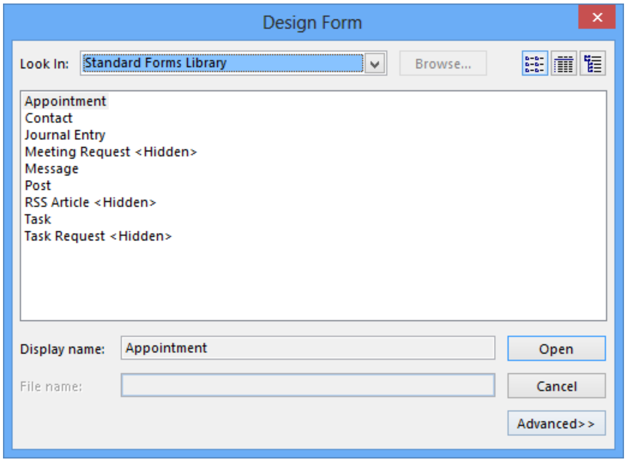
Although forms and item types are the basic elements you need to understand to create a custom Outlook 2013 solution, it's helpful to know what a message class is and how it relates to Outlook 2013 form development. A *message class* represents to Outlook 2013 internally what an item type represents to a user or developer externally. In other words, when a user opens an email message from the Inbox, that message is a MailItem. Internally, however, Outlook 2013 calls it by a different name: IPM.Note. IPM (which stands for *interpersonal message*) is a holdover from earlier generations of Microsoft's messaging systems. All messages in Outlook 2013 are representations of an IPM of some sort. An appointment calendar item, for example, is an IPM.Appointment. The list of default message classes includes the following:

- IPM.Note
- IPM.Contact
- IPM.DistList
- IPM.Appointment
- IPM.Task
- IPM.Post
- IPM.Activity
- IPM.Schedule.Meeting.Request
- IPM.StickyNote
- IPM.TaskRequest

Again, unless you're developing a fairly sophisticated collaborative solution, these message classes won't surface often. However, understanding what they mean to Outlook 2013 will help as you progress in your use of the program and in developing Outlook 2013 solutions.

Creating custom forms from standard forms

To begin working with the standard forms, first verify that you have added the Developer tab to the ribbon. If not, right-click the ribbon and choose Customize The Ribbon. Place a check beside Developer in the left list, and then click OK. Next, click the Developer tab in the ribbon, and then click Design A Form to display the Design Form dialog box, shown in Figure 27-2. You can simply select one of the standard forms listed in this dialog box and begin working with the form in design mode. Later sections in this chapter discuss how to save and publish the forms that you modify or create.



Look In: Standard Forms Library

Appointment
Contact
Journal Entry
Meeting Request <Hidden>
Message
Post
RSS Article <Hidden>
Task
Task Request <Hidden>

Display name: Appointment

File name:

Figure 27-2 In the Design Form dialog box, you can choose the type of form you want to create.

INSIDE OUT

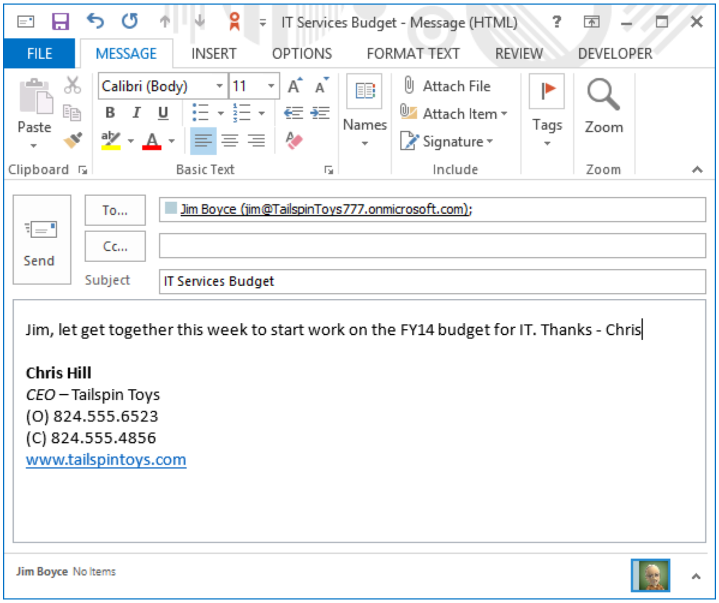
Avoid scripts when opening forms for design purposes

When you choose to redesign an existing form, that form might have a script with event handlers that will fire when you open the form in design mode. Usually, however, you don't want to have code firing when you're trying to design a form. To keep this from happening, hold down the Shift key as you click the form to open it for design. The code will still be present and will run when you debug the form, but it will not run while you open, design, and save the form.

Compose vs. read

One of the most basic processes in Outlook 2013 is sending and receiving messages and documents. Although this is a fairly simple process, it requires a close look. In nearly all cases, the form that a sender employs to compose an email message is not the exact form that the receiver of that message uses to read the message. For example, the recipient of an email message can't modify the body of the message without replying to or forwarding the message. This is because the standard forms have Compose and Read areas.

Figure 27-3 shows a message being composed; Figure 27-4 shows the same message after it has been received.


IT Services Budget - Message (HTML)
FILE
MESSAGE
INSERT
OPTIONS
FORMAT TEXT
REVIEW
DEVELOPER
Paste
Clipboard
Calibri (Body)
11
Basic Text
Names
Attach File
Attach Item
Signature
Include
Tags
Zoom
Send
To...
Cc...
Subject

To...: Jim Boyce (jim@TailspinToys777.onmicrosoft.com);

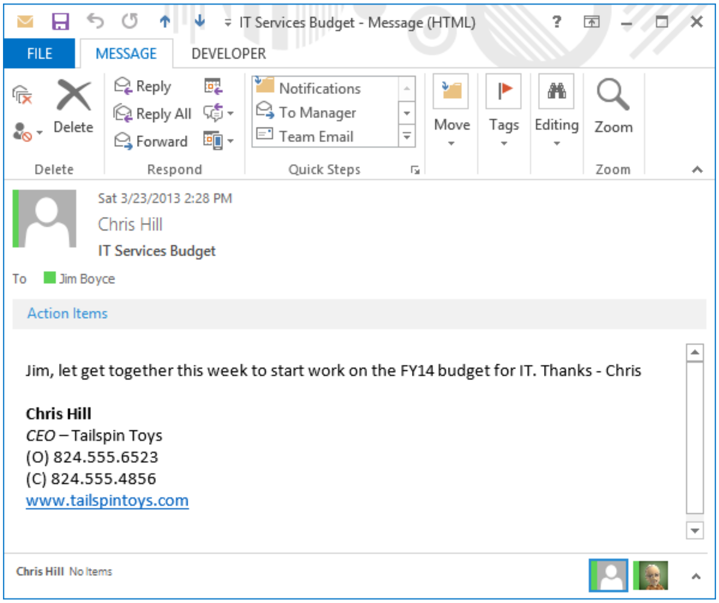
Subject: IT Services Budget

Jim, let get together this week to start work on the FY14 budget for IT. Thanks - Chris

Chris Hill
CEO – Tailspin Toys
(O) 824.555.6523
(C) 824.555.4856
www.tailspintoys.com

Jim Boyce No Items

Figure 27-3 Compose a message using a standard message form.


IT Services Budget - Message (HTML)
FILE
MESSAGE
DEVELOPER
Delete
Reply
Reply All
Forward
Respond
Notifications
To Manager
Team Email
Quick Steps
Move
Tags
Editing
Zoom

Sat 3/23/2013 2:28 PM
Chris Hill
IT Services Budget
To Jim Boyce

Action Items

Jim, let get together this week to start work on the FY14 budget for IT. Thanks - Chris

Chris Hill
CEO – Tailspin Toys
(O) 824.555.6523
(C) 824.555.4856
www.tailspintoys.com

Chris Hill No Items

Figure 27-4 Here is the same message shown in Figure 27-3 after it has been received. Notice that some fields can no longer be modified.

Notice that some of the fields, such as Subject and To, can't be modified by the recipient in the Read version. It is, however, entirely possible to configure a form with identical Compose and Read areas. Whether this makes sense for your Outlook 2013 solution is up to you.

To work with a standard form, click Design A Form on the Developer tab to display the Design Form dialog box (shown in Figure 27-2), and then select a Message type form. When you're working with a standard form in design mode, you can switch between the Compose and Read pages by clicking the Page button in the Form group on the Developer tab and choosing Edit Compose Page or Edit Read Page. You can select these options by clicking Page, as shown in Figure 27-5, and then clicking the Edit Compose Page or Edit Read Page option.

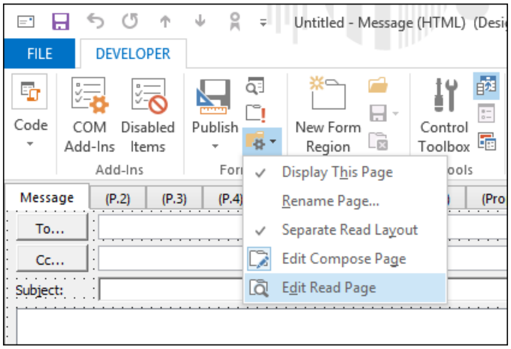

Untitled - Message (HTML) (Desi
FILE
DEVELOPER
Code
COM Add-Ins
Disabled Items
Publish
New Form Region
Control Toolbox
Add-Ins
For
ools
Display This Page
Rename Page...
Separate Read Layout
Edit Compose Page
Edit Read Page
Message
(P.2)
(P.3)
(P.4)
(Pro
To...
Cc...
Subject:

Figure 27-5 Use the Edit Compose Page and Edit Read Page options located in the Page menu to switch between compose and read views of the form.

In Figure 27-6, the Compose page of the standard message form is ready for editing. When you click Edit Read Page, the Read view of the form appears for editing, as shown in Figure 27-7.

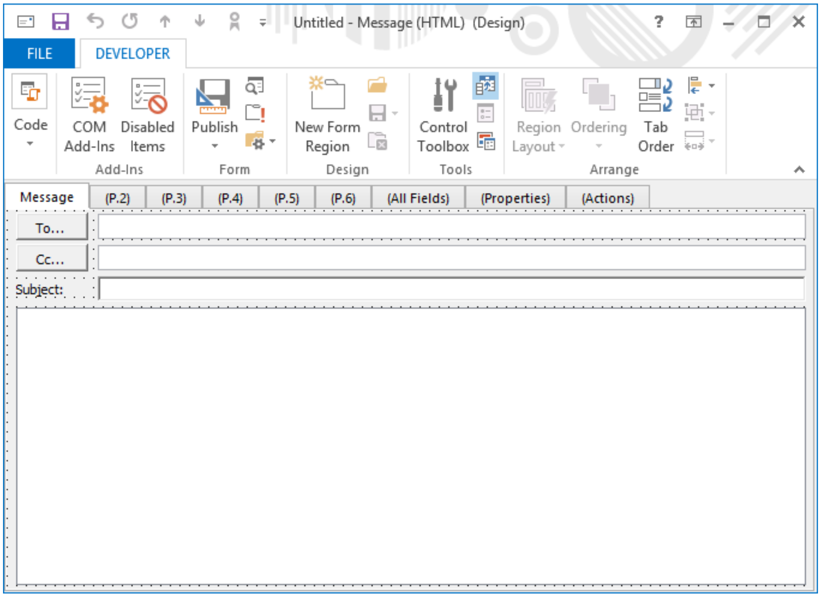

Untitled - Message (HTML) (Design)
FILE
DEVELOPER
Code
COM Add-Ins
Disabled Items
Add-Ins
Publish
Form
New Form Region
Design
Control Toolbox
Tools
Region Layout
Ordering
Tab Order
Arrange
Message
(P.2)
(P.3)
(P.4)
(P.5)
(P.6)
(All Fields)
(Properties)
(Actions)
To...
Cc...
Subject:

Figure 27-6 This standard Compose view is ready for editing.

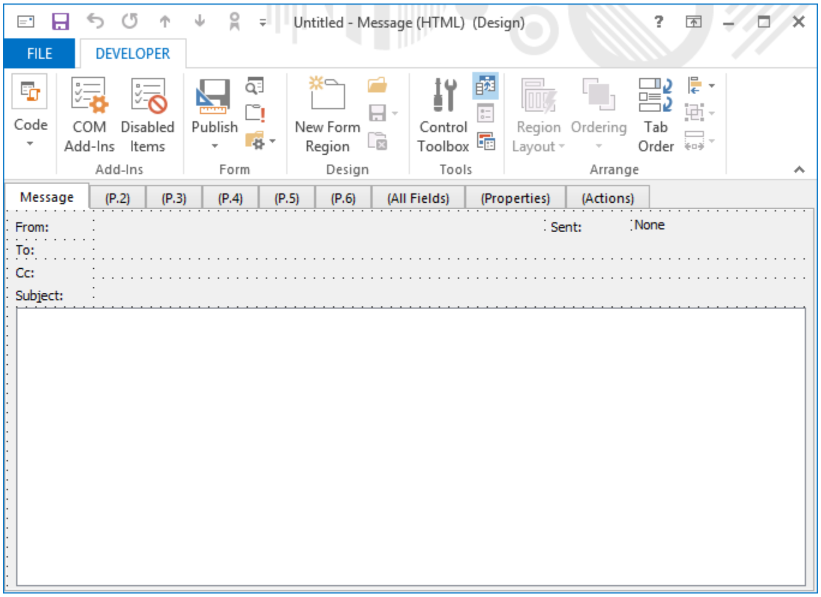

Untitled - Message (HTML) (Design)
FILE
DEVELOPER
Code
COM Add-Ins
Disabled Items
Add-Ins
Publish
Form
New Form Region
Design
Control Toolbox
Tools
Region Layout
Ordering
Tab Order
Arrange
Message
(P.2)
(P.3)
(P.4)
(P.5)
(P.6)
(All Fields)
(Properties)
(Actions)
From:
Sent:
None
To:
Cc:
Subject:

Figure 27-7 The Read view for a message item looks similar to the Compose view.

Because this is a standard form, a number of controls are already on the form. For example, the text box control for the body of the message is the largest element on the form. This control is bound to an Outlook 2013 field. The following section examines fields and what they mean to an Outlook 2013 solution; working with controls is discussed in the section "Adding and arranging controls."

Outlook fields

An Outlook 2013 field represents a discrete unit of information that is intelligible to Outlook 2013, such as the Bcc and To fields in an email message. You don't need to tell Outlook 2013 that email messages have these fields—they are already included in the standard form. Outlook 2013 provides a number of fields that you can use, and you can also add new fields. In theory, an unlimited number of fields are available, but the most common practice is to use a generous number of the built-in fields and a judicious number of new, user-defined properties. For now, this discussion focuses on the fields that are already available to you.

Because it provides so many built-in fields, Outlook 2013 groups them to make it easier to find the ones that you need. For example, some fields, such as To, From, Subject, Importance, Expires, Due By, Created, Size, and Attachment, are particular to email messages. Other fields, such as City, Children, and Birthday, are associated with Outlook 2013 contacts. You can, however, use fields from other forms to suit your needs on any form that you're designing—for example, Outlook 2013 doesn't prevent you from adding a Birthday field to an email form.

Note

You can find more information about user-defined fields in the Outlook 2013 Developer Reference at *http://msdn.microsoft.com/en-us/library/office/ee861520.aspx*.

When you work with a form, you can view the available fields in the Field Chooser, shown in Figure 27-8. To display the Field Chooser (if closed), click the Field Chooser button in the Tools group on the Developer tab; this button is a toggle that shows or hides the Field Chooser. In the Field Chooser, the fields are organized by categories and displayed in a list. You can choose a category in the drop-down list and then search in the body of the Field Chooser for the fields you need.

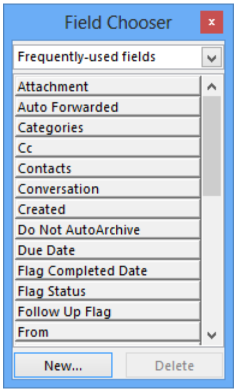

Field Chooser
Frequently-used fields
Attachment
Auto Forwarded
Categories
Cc
Contacts
Conversation
Created
Do Not AutoArchive
Due Date
Flag Completed Date
Flag Status
Follow Up Flag
From
New...
Delete

Figure 27-8 The Field Chooser allows you to view and choose the fields available for use.

Item types and fields

The scrollable list of fields shown in the Field Chooser in Figure 27-8 contains all the fields available for a form published in a certain folder. The standard item types come with a number of fields already defined. For example, a mail message comes with To, Subject, Body, and Sent fields already defined. Although you have the full range of fields available as you modify or create a form, you can speed up your development time and decrease your effort by carefully selecting a standard form that most closely corresponds to the solution you're developing. This way, you can use as many built-in fields as possible. You'll learn how to represent these fields on your form using controls in the section "Adding and arranging controls."

Creating custom forms from scratch

Working with standard forms is great if you want to build a solution that is directly related to one of the Outlook 2013 item types. However, you might need an Outlook 2013 form that isn't based on an item type at all. For example, you might want to create a form that allows users to report their work hours or initiate a purchase order. Although you could base these examples on a standard form, they could just as easily require a completely new form that you need to create.

The good news is that creating a completely new form is easier than it sounds. In fact, Outlook 2013 doesn't really permit you to create forms completely from scratch, although you can certainly achieve the same effect. You have two ways to create a form that doesn't contain any built-in form elements:

- Modify a standard form by deleting all built-in interface elements from the form and adding your own.
- Modify a standard form by hiding the page that contains built-in interface elements and showing a new page that contains elements that you add.

You'll learn how to add pages to forms in the next section. First let's look at how to break down a standard form to a blank form by removing built-in interface controls.

Follow these steps to turn a standard post form (a form that is used to post a note into a folder) into a blank form:

1. Click the Developer tab.
2. Click Design A Form.
3. Select the Post form, and then click Open. The form opens in design mode, with the Message page selected.
4. Click each control (TextBox, Label, Button, and so on) on the Message page and delete it.
5. With the Message page still selected, click Page in the Form group, and then select Rename Page.
6. Type a new name in the dialog box and then click OK.

Of course, you'll want to make the pages on this form useful, but for now, you at least have a blank form to work with. To have this blank form available as a template, click File, Save As, and then select Outlook Template from the Save As Type drop-down list.

Creating multipage forms

A multipage form allows you to fit a great deal of information on one form while also reducing confusion for the user. For example, you could create a form on which employees could both report their time for the week and report any expenses for which they need reimbursement. By using two pages, one form can serve both needs.

Any form can be a multipage form; all possible pages are already on the form that you create or modify. However, these pages are not visible automatically. If you look closely at the names on the page tabs shown previously in Figure 27-7, you'll see that except for the first name in the list, the name of each page is enclosed in parentheses, indicating that the page is not visible. To change the Visible property of a page, click its tab, click Page, and then select Display This Page.

Note

You can make all pages visible, but you cannot make all pages invisible. If you try to do so, Outlook 2013 tells you that at least one page must be visible on the form.

The first (default) page of a form, which is initially visible, has Compose and Read capabilities already available, as mentioned earlier. The additional pages on a form, which are initially invisible, don't have these capabilities until you add them. To do so, select one of these pages, click Page, and then choose Separate Read Layout, which activates the Edit Compose Page and Edit Read Page buttons.

Adding and arranging controls

The real power of forms comes from the controls that you place on them. To construct a robust Outlook 2013 forms solution, you need to plan carefully what the form is supposed to do; what pieces of information it will display, modify, save, or send; which controls will display these information units; and how the controls will be laid out. You can put two types of controls on a form: a control that is bound to an Outlook 2013 field and a control that is not. This section looks first at field-bound controls. Field-bound controls are bound to specific control types, such as drop-down lists, text boxes, command buttons, labels, or check boxes.

To display a field on your form, follow these steps:

1. Display the Field Chooser, and then select a field category in the drop-down list.
2. In the scrollable list in the Field Chooser, select the field that you want, and then drag it onto the form.
3. Format the control as needed.

INSIDE OUT Work with the users of the form

You can place any number of controls on a form, but it's a good idea to plan your form with an eye toward usability. Work closely with those individuals who will be using the form to ensure that it corresponds to their real needs. Find out how the users want the forms to be laid out, and listen to their suggestions about how the information should flow. No matter how much work you put into your solution, it won't be useful unless people actually use it.

You can resize, move, or rename a control, and you can change a number of its properties. To resize the control, select the control by clicking it, and position the mouse pointer over one of the control handles, which are represented by small boxes. When a small arrow appears, you can drag the handles in the appropriate direction to resize the control.

To move a control to a new location, simply drag it. Notice that the form's canvas is covered with a grid. Each point on the grid is a possible location for a corner or other relevant point on a control. You can choose to have controls snap to the grid points by right-clicking the grid and selecting Snap To Grid. You can define the distances between the points on this grid. This is important because the greater the scale of the grid (the greater the distance between points on the grid), the fewer places you can locate a control on your form. Conversely, the smaller the scale, the more you can refine the positioning of your controls.

To change the grid, follow these steps:

1. In the Arrange group, click Align.
2. Click Set Grid Size.
3. Type a value (in pixels) for the height and width spacing.
4. Click OK.

The smaller the number that you use for spacing, the smaller the scale. This means that more points on the grid will appear, and you can have more control over where your objects fit on the grid. The default is 8, but 3 is a good number to choose for greater positioning control.

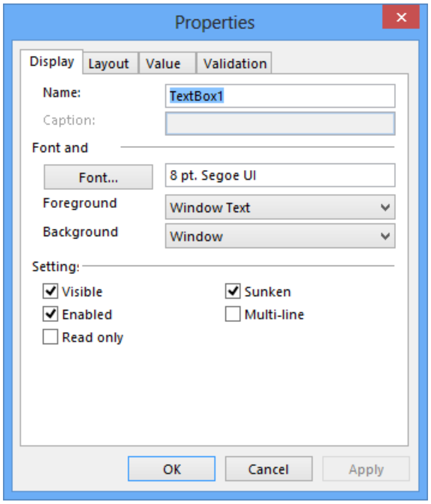
INSIDE OUT

Limit controls on your forms

When you’re using controls on forms, you can be tempted to make one form do too much. Although there’s no precise limit for the number of controls that can be included on one form, the recommendation is using fewer than 300. However, my experience with custom forms development suggests that even 100 is excessive. You should try to keep the number of controls down to a few dozen or so when possible. Forms that try to do too much usually become confusing to users, and these forms often do not perform well. Keeping your forms focused and giving them a crisp design makes them easier to code and debug, too. If you find that your form is overloaded, consider creating a COM add-in to allow a broader application context, or develop a stand-alone application that handles all your information needs.

Properties

Controls have a number of properties that you can view and modify. To find out what these properties are, right-click a control and then choose Properties on the shortcut menu to display the Properties dialog box. Figure 27-9 shows a Properties dialog box for a text box control.



Name: TextBox1
Caption:
Font and
8 pt. Segoe UI
Foreground: Window Text
Background: Window
Setting:
☑ Visible
☑ Enabled
☐ Read only
☑ Sunken
☐ Multi-line

Figure 27-9 You can use the Properties dialog box to modify the properties of a control.

Display

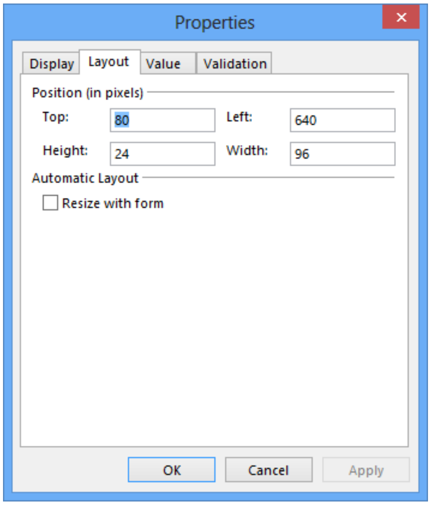
The Display tab of a control's Properties dialog box (a text box example is shown in Figure 27-9) lists the most commonly used properties of the particular control. Changing the setting of a property in this dialog box enables the Apply button; clicking Apply or OK sets the value of that property for the selected control.

The default names of controls are rather generic, such as TextBox1 or CheckBox1. You'll want to change these to names that are more descriptive for your solution, such as txtFirstName or chkHasVacation.

You can learn more about naming conventions for controls by visiting the Microsoft MSDN website at *http://msdn.microsoft.com* and searching for "Visual Basic Coding Conventions Overview."

Layout

The Layout tab in the Properties dialog box lets you set the position of the field within the form. The position settings are set in pixels offset from the top and left side of the form. You can specify the height and width of the field as displayed in the form by setting the Height and Width values. You can also configure the field to resize itself automatically as the form size is being changed by selecting the Resize With Form check box in the Automatic Layout area, as shown in Figure 27-10.

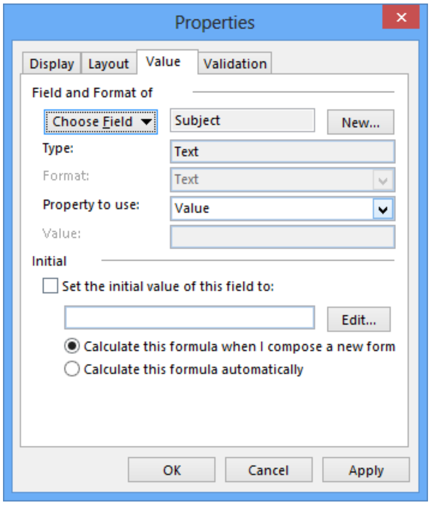


Top: 80
Left: 640
Height: 24
Width: 96
☐ Resize with form

Figure 27-10 Use the Layout tab to set the position and size of a control.

Value

The Value tab in the Properties dialog box, shown in Figure 27-11, contains a number of settings that relate to the field value that the control represents. As mentioned, each control in the Field Chooser list is bound to an Outlook 2013 field. When you modify the properties of a control, you can change the field to which the control is bound.



Field and Format of: Subject

Type: Text

Format: Text

Property to use: Value

Value:

Initial

☐ Set the initial value of this field to:

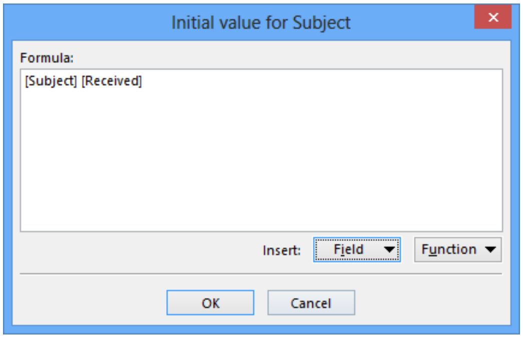
● Calculate this formula when I compose a new form

○ Calculate this formula automatically

Figure 27-11 Use the options on the Value tab to set the field and format for a control.

To change the bound-field property, click Choose Field and then select the field to which you want to bind the control in the drop-down list. Make sure that the field value is bound to the correct property of your control. Normally, the field value is tied to the control's Value property; this is rarely changed. However, you can change this setting so that, for example, the value of a field is tied to your control's Enabled property. In this case, if the value of the field is True, the control is enabled; if the value is False, the control is not enabled.

You can also set the initial value of your control to display a default value. Set the Initial Value Of This Field To check box, and then type an initial value in the text box. This value doesn't have to be predetermined—you can have it correspond to a dynamic value, such as the current day or the concatenation of the Subject field and the current date. To make the initial value more dynamic, click Edit to open the Initial Value For dialog box; an example is shown in Figure 27-12.



[Subject] [Received]

Figure 27-12 Use this dialog box to customize the initial value for a control.

In this dialog box, you establish a formula for the initial value of your control. For example, you can simply insert a built-in function, such as *Date( )*, for the formula.

To insert a built-in function—the *Date( )* function, in this example—follow these steps:

1. Click Function.
2. Click Date/Time, and then click Date( ).
3. The function appears in the Formula text box.
4. Click OK, and then click OK again to close the Properties dialog box.

When you run the form, the text box control will contain the current date as its initial value. Your users can always change the control's initial value unless you set the control to Read Only (on the Display tab).

Validation

The Validation tab in the Properties dialog box allows you to set certain properties that relate to how (or whether) the value of the control is validated. For example, if you create a form for a purchase order, you might want to ensure that users indicate the quantity of parts that they want to order. The order processing staff will send you many thanks for requiring certain values before the purchase order gets to them because it reduces the amount of information traffic and busywork needed to process an order.

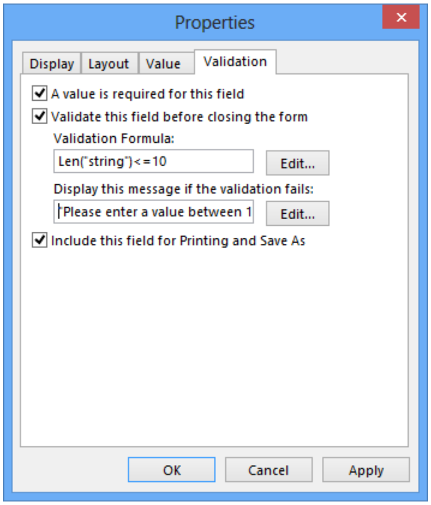
Suppose that you've added a control to your form that requires a value for a text box, and that value is required to be less than or equal to 10 characters. If the user fails to enter a valid value, Outlook 2013 will display a message that prompts the user to enter a correct value.

To set the properties on the Validation tab that will be necessary for this example, as shown in Figure 27-13, follow these steps:

1. Display the Properties dialog box, and then click the Validation tab.
2. Select the A Value Is Required For This Field check box.
3. Select the Validate This Field Before Closing The Form check box.
4. Click the Edit button located to the right of the Validation Formula text box.
5. Click Function.
6. Click Text, Len(string), and then click OK. The Len(string) function appears in the Validation Formula text box.
7. In the Validation Formula text box, type **<=10** after the function, and then click OK.
8. In the Display This Message If The Validation Fails text box, type the following text (including the quotation marks):

   “Please enter a value between 1 and 10 characters in length.”

   Alternatively, you can click Edit, type the message without quotation marks, and then click OK.
9. Click OK to close the Properties dialog box.



☑ A value is required for this field
☑ Validate this field before closing the form
Validation Formula: Len("string")<=10
Display this message if the validation fails: Please enter a value between 1
☑ Include this field for Printing and Save As

Figure 27-13 Use the Validation tab to require and verify the value entered in a control.

In the example exercise, when a user works with your form, the text box that requires validation must contain a value, and the value must be less than or equal to 10 characters. If the value the user enters is 11 characters or more, Outlook 2013 will display a message box containing the validation text that you provided when the user tries to send the form. The user can then make the appropriate changes to the text box value and attempt to resend the form.

Standard controls

This chapter has thus far concentrated on controls that are bound to Outlook 2013 fields and that appear in the Field Chooser. However, these aren't the only controls that you can add to a form. This section takes a brief look at some of the standard controls that are available in Outlook 2013, as well as controls that come as part of the Office system.

Controls appear in a Control Toolbox, which is a small, resizable window made visible when you click the button next to the Field Chooser button on the form. Figure 27-14 shows the Toolbox.

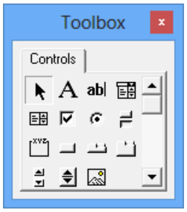


Figure 27-14 The Control Toolbox allows you to add controls to your form.

As you hold the mouse pointer over the control icons in the Toolbox, the name of each control appears. To add one of these controls to your form, drag the control icon onto the form. You can then resize and reposition the control or set its properties, as discussed earlier.

Note

Refer to the Outlook Developer Reference at *http://msdn.microsoft.com* to learn more about the properties, methods, events, and possible uses of the standard controls.

These standard controls are useful but limited. As your skills in developing Outlook 2013–based solutions progress, you'll find that you need functionality that transcends the abilities of the standard controls provided in the Toolbox. Fortunately, you can add other controls and make them accessible via the Toolbox window. For example, if you design a number of forms that need the Outlook Date Control to enable the user to pick a date, you can add that control to the Control Toolbox.

Follow these steps to add the Outlook Date control to the Toolbox:

1. Right-click an empty area of the Toolbox window.
2. Choose Custom Controls.
3. Scroll down the Available Controls list, and then click the box next to Microsoft Outlook Date Control.
4. Click OK. The control appears in the Toolbox.

You can now add this control to a form and work with its specific properties and behaviors just as you did for the standard controls.

Custom controls can make your Outlook 2013 solution extremely robust and powerful. However, be aware that the control you're using might not exist on the computer of the person receiving the message. In other words, although you might have a particular control on your computer, the person who uses your form to compose a message or receives a message composed on your form might not have that control installed. For your solution to work, you need to ensure that the custom controls you use are distributed to and installed on other users' computers properly.

Note

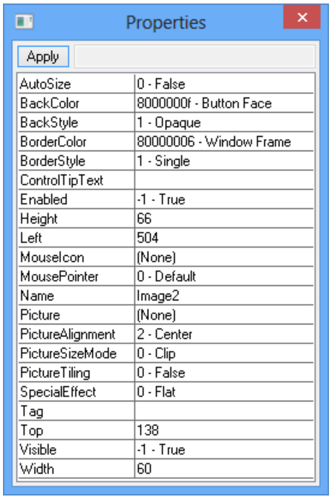
Methods of distributing custom controls vary widely. Some controls come without an installing package, many use Microsoft Installer, and others use a third-party installation mechanism. You should read the documentation that accompanies your custom control or consult the manufacturer to determine the best method for distributing your control.

After creating your form, you can test it to see what it looks like when it is run. With the new form open, choose Run This Form in the Form group. This won't cause the form to close or disappear; instead, Outlook 2013 produces a new form based on the form that you've just created. The newly created form is an actual running form that you can send and read, and any included functions or scripts are also run when the form is opened.

Adding graphics to forms

Although developing solutions in Outlook 2013 can require much thought and effort, users might not necessarily share your enthusiasm and excitement about the forms that you've created. One way to increase acceptance and usability is to add some pleasing graphics to the forms. These graphics can come in a variety of formats, such as JPEG, GIF, WMF, EMF, and ICO.

One way to add a graphic to your form is to use the image control from the Control Toolbox. Initially, the control will appear as a gray square. You can resize it, just as you can resize any of the standard controls, although it's a good idea to place the picture in the control before you resize it. Set the picture source for the image control by using the Properties dialog box, shown in Figure 27-15. Double-click the Picture property, and then select the desired picture in the Load Picture dialog box.



AutoSize	0 - False
BackColor	8000000f - Button Face
BackStyle	1 - Opaque
BorderColor	80000006 - Window Frame
BorderStyle	1 - Single
ControlTipText	
Enabled	-1 - True
Height	66
Left	504
MouseIcon	(None)
MousePointer	0 - Default
Name	Image2
Picture	(None)
PictureAlignment	2 - Center
PictureSizeMode	0 - Clip
PictureTiling	0 - False
SpecialEffect	0 - Flat
Tag	
Top	138
Visible	-1 - True
Width	60

Figure 27-15 Use the Properties dialog box to select a picture to insert into the image control.

Follow these steps to insert a picture in your control:

1. Right-click the image control that you placed on your form.
2. Click Advanced Properties.
3. In the list of properties, scroll down to the Picture property.
4. Select the Picture property and then click the ellipsis button at the top of the form, or simply double-click the Picture property.
5. In the Load Picture dialog box, navigate to the picture that you want to appear in the image control, and then click Open.
6. Close the Advanced Properties dialog box, and then verify that the control now contains the picture you chose.

INSIDE OUT **Change your images at run time**

As is the case with all the controls that you use on a custom form, you can change the values of many of their properties when the form is running. For example, you can create a form with an image that changes based on certain criteria. You can add code to your form that alters the setting of the control's Picture property and thus loads an image into the control that is different from the image you specified at design time.

Another way to make your forms more attractive and usable is to add an icon to buttons on the forms. You can configure the command button available in the Toolbox to display both a text caption and a graphic. For example, if your button sends a custom message to a recipient when clicked, you could add an envelope image to the button to convey the notion of sending a message. To have the button display an image, set the Picture property for the button just as you would for an image control. You can also set the Picture property for other controls, such as text boxes and labels.

In addition, you can display a custom icon in the form's title bar. Outlook 2013 always displays a default icon in the upper-left corner of a form that indicates whether it is a task form, an appointment form, and so on. You can change this icon by clicking the Properties tab of your form when you're working in design mode. Click Change Large Icon or Change Small Icon, and then navigate to the .ico file you want to use. The Large Icon setting tells Outlook 2013 which image to display when a user displays the properties of the form. The Small Icon setting specifies the title bar image and the image that is shown when the form is displayed in an Outlook 2013 folder.

Adding user-defined fields

There are times when the types of data that you need to share, gather, or track with forms exceed the Outlook 2013 default field definitions. You might want to have your contact form display the hire date and review date, for example, but these fields don't exist in the Outlook 2013 field list.

You can define new fields that contain information that is relevant to your use of Outlook 2013. These user-defined fields can be bound to a control in the same way that you bind a preexisting field to controls in Outlook 2013 forms.

When you want to implement a new field in a form, start by opening the Design Form dialog box. To create a new form field, you can either open the Field Chooser and click New or click the All Fields tab and then click New.

The New Column dialog box will prompt you for the field name, data type, and display format for the new field. In the Name box, type the name of the new field, such as **Hire Date**, and then select the data type for the field in the Type drop-down list—in this case, Date/Time. In the Format drop-down list, select the display format for the date (or day, time, and date) layout that you want for the field.

The new field is added to the Select From drop-down list, and you can find the new field in the User Defined Fields In Inbox item. The field can be selected in the Field Chooser and on the All Fields tab. To use your new field, drag it onto your form. You will need to remember to add the field to both the Compose Page and the Read Page, and commonly you will want to set the properties of the field in the Read Page to read-only (on the Display tab).

Publishing and sharing forms

After you create your form and define its behaviors, properties, and settings, you'll want to make it available to users. First, however, you'll need to preserve your form in one of these two ways:

- Save the form as a file.
- Publish the form to a folder or other location.

Saving forms

You can save a form by clicking File and then clicking Save As. In the Save As dialog box, enter the file name and select the location. The form file is saved as an Outlook Template file (.oft).

Publishing forms

Publishing a form is a lot like saving the form. When you finish your form, you can publish it to a specific folder location. You can publish it to your Inbox or another folder in your mailbox, a public folder, the Organizational Forms Library (with Microsoft Exchange Server), or your Personal Forms Library.

Follow these steps to publish a form to a folder or forms library:

1. Click Design A Form on the Developer tab.
2. In the Design Form dialog box, select the location (such as User Templates In File System) containing the form that you want to publish.
3. Select the form that you want to publish, and then click Open.

4. In the Form group, click Publish, and then click Publish Form As to open the Publish Form As dialog box. (The first time you use the Publish button, the Publish Form As dialog box will be displayed, but after a form has been saved once, the Publish button will simply save the existing form, overwriting the previous version.)
5. In the Look In drop-down list, select the folder or forms library where you want to publish the form. (The default is the Personal Forms Library.)
6. Type the display name and the form name.
7. Click Publish in the Publish Form As dialog box to save the form in the selected location.

INSIDE OUT **Create a staging area for your forms**

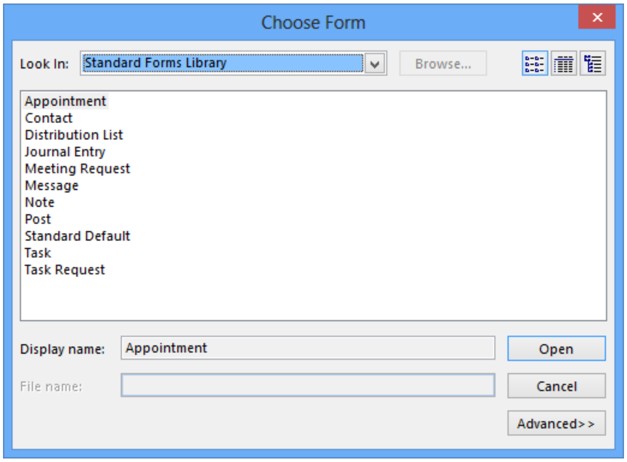
When you're creating a form, it's a good idea to keep the production version of the form separate from the development version. Create a staging folder where you publish the forms that you're working on. When you complete a form design, publish your form in this staging folder at regular intervals so that you don't lose the modifications you've made to the form. Only people designing and testing forms for your organization should have access to this folder.

After you publish a form, the folder in which you publish it contains the form itself and all the underlying information that another person's instance of Outlook 2013 needs to understand the form.

Choosing forms

After you have created a custom form and saved or published it for common use, you will need to select the form to use it. Custom forms are normally stored in a location related to their expected use. Custom forms intended for common use, for example, are usually stored in an accessible network location. If you have a custom form intended for your own use, however, you would store it in the Personal Forms Library. Alternatively, if you want to use a form that you have saved to a folder on your local hard disk, you would store it using the User Templates In File System location.

In each of these cases, to locate your custom form, select the appropriate location in the Look In drop-down list of the Choose Form dialog box, shown in Figure 27-16.



Look In: Standard Forms Library

Appointment
Contact
Distribution List
Journal Entry
Meeting Request
Message
Note
Post
Standard Default
Task
Task Request

Display name: Appointment

File name:

Figure 27-16 Select a custom form in the Choose Form dialog box by first selecting its location.

To use a custom form from these (or any other) locations, follow these steps:

1. Click Choose Form on the Developer tab.
2. In the Choose Form dialog box, select the location in which your custom form is stored (such as the Personal Forms Library).
3. Select the custom form that you want to use.
4. Click Open.

Using forms effectively

Each of the forms in Outlook 2013 serves the same purpose—to present information in a specific format. Outlook 2013 forms provide access to all Outlook 2013 items (messages, notes, meetings, tasks, journal entries, and so on) and enable you to create custom forms using any of the available fields. By creating custom forms that align with your workflow, you can ease the communication of information as well as the transfer of data important to your business.

In creating custom forms, you begin by selecting a default form that most closely resembles the form and function that you want for your new forms. You can then choose to add or delete fields on the default page and/or create additional pages containing fields to display or gather further information. Here are some pointers about using forms:

- **Know when not to create forms** Outlook 2013 form creation can give you the ability to customize email messages, meeting requests, and other Outlook 2013 items, but if existing forms provide the functionality you need, it is easier and more effective to use the existing forms. When you consider creating a new form, start by asking, "Is the functionality I need already present in an existing form?" Consider that in addition to the time needed to create a custom form, there are distribution logistics (how you get the form to all who would need it), as well as training needed to enable people to effectively use the new form.

- **Keep forms simple but comprehensive** Once you have decided that a new form is necessary, evaluate the information that you need the form to display, transmit, or gather, and then limit the form information to the minimum data required to fulfill your operational or organizational needs. You can create a custom form with multiple pages containing an exhaustive array of fields, yet the complexity of using such a form could easily outweigh any hoped-for benefits. Keep in mind that each custom form that you create is intended to facilitate the communication of information. The easier it is for people to use the custom form to exchange information, the more likely it is that people will use the form, and thus the more value it will have for your organization.

  Consider a custom form created to enhance customer relationship management by including 15 fields of concise contact information, key project assessment, and a project status summary versus a custom form that includes 5 pages containing 200 fields of exhaustive contact information, step-by-step project notes, milestones and timelines, equipment reserved, travel time, technical assessments, customer evaluation, and so on. The first option with 15 fields is much more likely to be used. When you actually have a need to gather 200 fields' worth of information, you'll want to consider subdividing the data into related sets and then creating separate forms for each set. (Or in this case, use an existing solution like Microsoft Dynamics CRM.)

- **Use user-defined fields to store information not included by default in Outlook** Although Outlook 2013 contains fields for the data it uses in contacts, email, meeting requests, tasks, and so on, there are invariably additional pieces of information that your organization could benefit by having included that are not part of the Outlook 2013 default field set. Consider additions to the meeting form that could be useful when you're scheduling meetings with coworkers. For example, to identify who will be leading the meeting, you could add a Presenter field to the custom meeting request form. Likewise, you might consider adding Food Preferences and Food Allergies fields to a custom appointment form for those appointments with clients or staff that involve dining out or food being brought into the event.

You might want to add information in your contact list that isn't shared, but that assists you in working with others or relating to their personal interests. You could, for example, create a custom contact form to enable you to track the specialized knowledge or favorite sports of each of the people in your contact list. Then, for example, when you want to find a coworker who just happens to know how IPv6 actually works, you can search on "IPv6" and display the names of every person in your contact list who is fluent in IPv6. (Searching for user-defined fields requires you to select the Query Builder and then add your custom form and fields to the query criteria.)

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