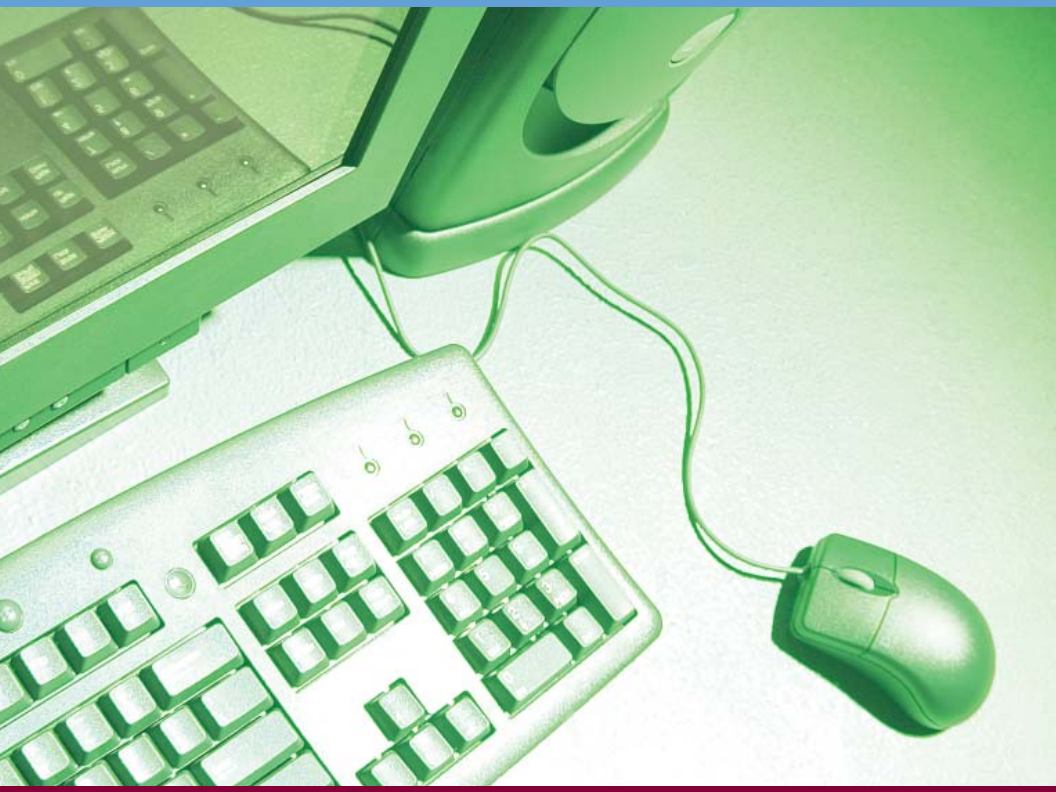
NEW YORK STATE BAR ASSOCIATION



The Busy Lawyer Quick Computer Reference Guide

for Outlook, Word and Powerpoint

Prepared for the Law Practice Management Committee
of the New York State Bar Association by:

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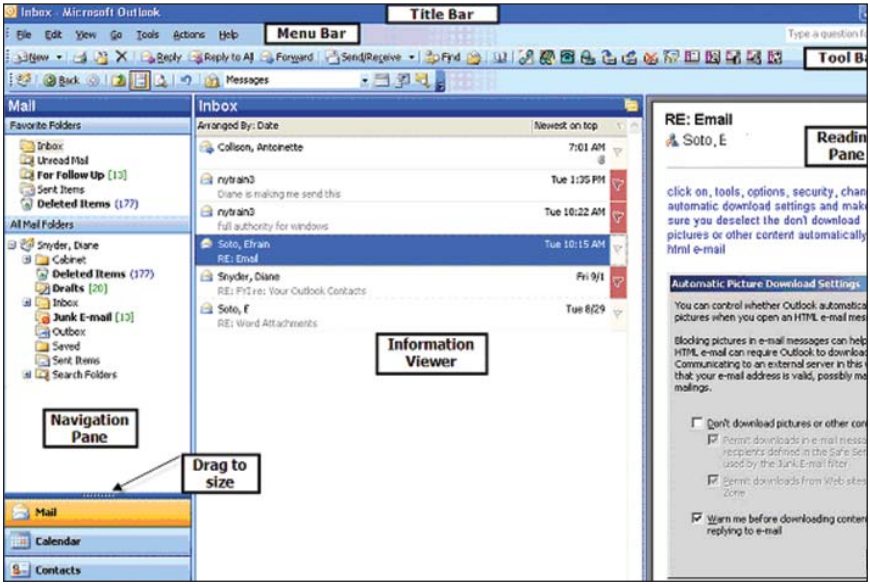
OUTLOOK

Parts of the Outlook Screen



You can choose the placement of the Reading Pane.

1. Click on **VIEW** from the menu and click on the **READING PANE** and then choose **RIGHT, BOTTOM,** or **OFF.**

Mail v. The Folder List on the Navigation Pane

1. **MAIL** provides you with the Favorite Folders Option.
2. **THE FOLDER LIST** lets you quickly see all your folders, including Public Folders, in one place.

Folders

Favorite Folders

Once you have created a Folder (File, New, Folder), you can make it a Favorite. Either drag it to the Favorite Folders pane or right click and choose **ADD TO FAVORITES.**

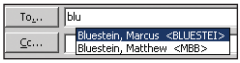
Search Folders

You can perform a Search and then Save that Search for future re-use. Any new email messages that meet that criteria will automatically be included in the Search results.

1. Click **FIND** to access the Find Bar.
2. Type the search phrase and click **Find Now.**
3. Once the Search is complete, click the drop down arrow next to Options and choose **SAVE SEARCH AS SEARCH FOLDER.**

Addressing E-Mail

When you type a person's name in the To field, Outlook checks what you have typed against the names in the Global Address List and your Contacts list. As you start typing names and e-mail addresses, Outlook offers a list of names that match what you have typed so far. To use this feature, you must have previously sent a message to that exact address.

Check Names	Description
Finds Exact Match **Multiple Matches are Found**	The name is underlined in black. When the name appears with a green wavy underline, right-mouse click on the name and choose from the list. A drop-down list will appear ONLY if you have sent email to that name sometime in the past. 

Deleting an E-Mail Address from the Name Checking List

1. **TYPE** the email address you want to delete from the Name Checking List.
2. Use your **ARROW KEYS** to highlight the address you wish to delete.
3. Press the **DELETE** key on your keyboard to delete the name from the list.

Spell Checking – Automatically Before Sending

You can manually spell check before sending email or have Outlook automatically check the spelling.

1. Choose **TOOLS, OPTIONS** from the menu and click on the **SPELLING** tab.
2. Click on **ALWAYS CHECK SPELLING BEFORE SENDING,** then click **OK.**

Using Voting Buttons

You can use Voting buttons to track and collect responses. Only the recipient can see the Voting Buttons. As you receive responses, the Tracking tab in Sent Items displays a tally of the votes, the date and time the message arrives, and comments from the sender.

1. Create a new e-mail and click on the Options... button from the toolbar.
2. Under **VOTING AND TRACKING OPTIONS,** check the option **USE VOTING BUTTONS.**
3. Click on the **DROP-DOWN ARROW** to see other Voting Button choices or customize the Voting button text by typing your own entries. Use semicolons to separate each button entries.
   For example if you want to take on vote on where to have a lunch meeting:
   Use voting buttons: Mortons;Sparks;Peter Lugers
4. Click on the **CLOSE** button when finished, complete the **SUBJECT** and **MESSAGE** and **SEND.**

Displaying Tracking Information

As long as you tracked the e-mail before sending you can view the tracking information at any time. If you use Voting Buttons the responses will also be tracked via Sent Items.

1. Click on **SENT ITEMS.**
2. **DOUBLE-CLICK** on the e-mail you sent with tracking, look for the icon next to it.
3. Click on the **TRACKING** tab and all tracking information is displayed.

Resend

You may decide that you want to resend a message to someone who you forgot to include originally as a recipient. The Resend feature is a great time saver because you can add additional recipients as well as edit a message, without having to create a new message.

1. Click on **SENT ITEMS.**
2. **DOUBLE-CLICK** to open the e-mail you want to resend.
3. Click on **ACTIONS, RESEND THIS MESSAGE** from the menu and the message is displayed.
4. Select recipients and edit a message if necessary.
5. **SEND** the E-mail.

Marking E-Mail as Unread

You can change the status of how a message is displayed in your Inbox by marking it as read or unread. When a message is unread, it is displayed in bold and the unread message symbol is displayed. Marking a message as unread can be useful if you are interrupted while reading a long message. You can mark the message as unread as a reminder to return and finish reading the message at a later time.

1. **RIGHT-MOUSE CLICK** on the message.
2. Click on **MARK AS UNREAD** from the shortcut menu the message now appears as unread.

Flagging E-Mails for Follow Up

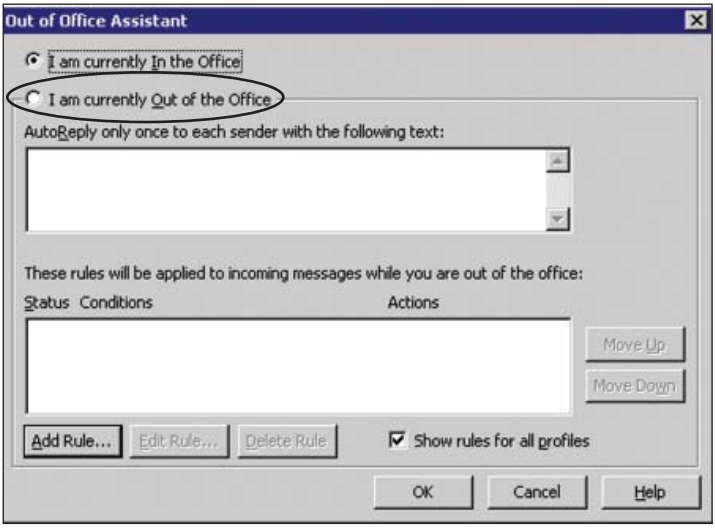
Use flags to remind yourself that a message requires further action.

Click the flag on the message. A right click will give you color and reminder options.

Out of Office Assistant

This feature allows you to setup an automatic reply when you are out of the office.

1. Click on the **INBOX.**
2. Choose **TOOLS, OUT OF OFFICE ASSISTANT** from the menu and the dialog box appears:



3. Click on the option **I AM CURRENTLY OUT OF THE OFFICE.**
4. In the **AUTOREPLY ONLY ONCE TO EACH SENDER** text box and type the message you want to send to others while you are out.
5. Click **OK.**

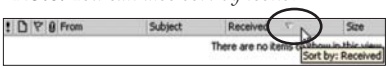
6. Exit Outlook.

Note: The next time you start Outlook the system will know that your Out of Office is on and will prompt you to turn it off.

Sorting E-Mails

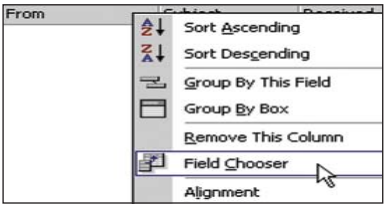
Sorting is a way of arranging items in ascending or descending order. You can sort items in any view, based on one field or multiple fields. For example you can sort the Inbox alphabetically by Sender (From field) or maybe you prefer by Date and Time (Received Field). Keep in mind when you sort by the Subject field the abbreviations RE and FW in the Subject are ignored.

1. **CLICK ONCE** on either the **FROM, SUBJECT, RECEIVED** or **SIZE** fields from the Inbox.
2. An arrow is now displayed on that field indicating that this is the sort column. Notice the direction of the triangle, **UP** indicates **ASCENDING** and **DOWN** indicates **DESCENDING.**
3. **CLICK AGAIN** on the same column field and you switch the sorting for that column.
   Note: *You can also sort by icons.*



Lose an email column? Field Chooser will get it back

1. **RIGHT-MOUSE CLICK** on any existing column heading.
2. Click on **FIELD CHOOSER** from the shortcut menu:



3. The **FIELD CHOOSER** dialog box appears.
4. From the Field Chooser **DRAG** the desired field up to the field area, resize as needed.

Finding Related E-Mails

Finds all message that have the same subject.

1. **RIGHT-MOUSE CLICK** on the Info Bar in a message..

2. From the shortcut menu, choose **FIND RELATED MESSAGES.** The Advanced dialog box appears and all the messages from that sender are listed within this dialog box.

3 From here you can **DOUBLE-CLICK** and **OPEN** any message.

Signatures

Signatures can automatically be inserted to the end of all e-mail message you create. The Signature enables you to create multiple Signatures as well as to select the Signature that you would like to use as your default.

Creating/Editing/Deleting Signatures

1. Choose **TOOLS, OPTIONS** from the menu.
2. Click on the **MAIL FORMAT** tab.
3. Click on the **SIGNATURES** button at the bottom, the **CREATE SIGNATURE** dialog box appears.
4. Click on the **NEW** button.
5. **TYPE A NAME** for your Signature in the **CREATE NEW SIGNATURES** dialog box
6. Leave the option **START WITH A BLANK SIGNATURE** selected and click on **NEXT.**
7. **TYPE** all the information you would like to have in your signature, see example below:

   Mr. John Smith
   Kraft Kennedy & Lesser, Inc.
   360 Lexington Avenue
   10th Floor
   New York, NY 10017
   Direct: 212-555-1212
   Main: 212-555-1414

8. If necessary, highlight the text you just typed and click on the **FONT** button to format the text.
9. Click on the **FINISH** button.
10. You can now preview your Signature, click **OK** when finished.
11. By default the signature you just created will automatically be inserted into all new emails.

Note: *To have no default Signatures, click on the drop-down arrow next to* ***Signatures for New Message*** *and select* ***None.***

12. Click **OK.**

Inserting Signatures

1 **CREATE A NEW E-MAIL** and make sure the insertion point is positioned in the message area where you want the Signature to be inserted.

2. Click on the **SIGNATURE** button from the toolbar.

3. Click on the signature you wish to insert.

Contacts

Creating Contacts from the Same Company

1. **OPEN THE CONTACT** that you already created from that company.

2. While the contact dialog box is displayed, choose **ACTIONS, NEW CONTACT FROM SAME COMPANY.** A Contact form is displayed with any company-specific fields already filled in, saving you time when typing the new contact.

Forward vs. Forward as V-Card to Another User

1. **DOUBLE-CLICK** to open the contact you wish to forward.

2. Choose **ACTIONS** and click on either **FORWARD** *(internal)* or **FORWARD AS V-CARD** *(external).*

3. **ADDRESS** and **SEND** the contact.

Creating Contacts from E-Mail

1. **OPEN** the E-Mail and **RIGHT-MOUSE CLICK** on the sender's e-mail address.

2. Click on **ADD TO CONTACTS.**

3. Type in any additional information, if necessary, click on the **SAVE AND CLOSE** button.

Drag E-Mail to Contacts

1. **DRAG** the **E-Mail** onto Contacts.

2 Type in any additional information, if necessary, click on the **SAVE AND CLOSE** button.

Working with Views

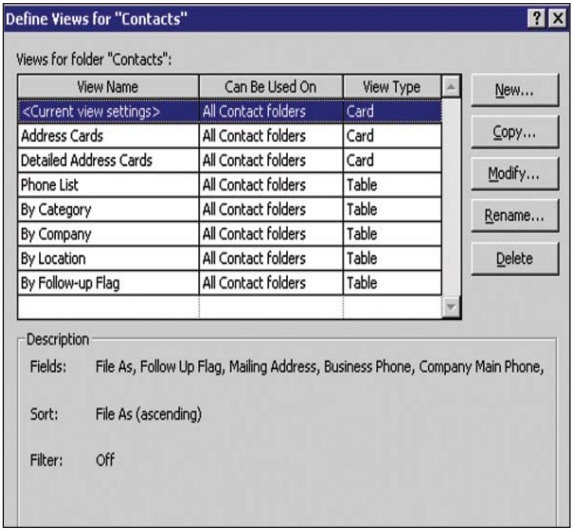
You may find that you want a more or less detailed view of Contact information. You can change your current view of a Contact according to your needs. Outlook includes many different views for Contacts, or you can create a custom view.

1. At this point make sure the **ADVANCED** toolbar is displayed *(View, Toolbars, Advanced).*
2. Click on the **VIEWS DROP-DOWN LIST** next to **ADDRESS CARDS** and choose from the list.

Customizing Views

You might find that a specific view that you need in Outlook is not available in a particular folder. The Define Views dialog box enables you to create a **NEW** view, **COPY** *(recommended)* **MODIFY, RENAME** and **DELETE** a view.

1. From the **ADVANCED** toolbar, click on the **VIEWS, ARRANGE BY, CURRENT VIEW, DEFINE VIEWS** and the Define Views dialog box appears:



2. Choose from the options buttons, New, Copy, Modify, Rename or Delete.
3. When finished, click on either the **APPLY VIEW** button which applies the selected view or just click the **CLOSE** button to close the dialog box.

Finding Contacts

Use the **FIND A CONTACT** feature from the Standard toolbar to quickly type and find a contact. You can type a partial first or last name, e-mail, and company name. To quickly open a contact you have previously searched for, click on the Find a Contact drop-down arrow and select from the list.

Creating a Distribution List

A Distribution List is a group of people that often send e-mail to. For example, if you frequently send messages to the marketing team, you can create a distribution list called "Marketing Team" that contains the names of all members of the marketing team. A message sent to this distribution list goes to all recipients listed. Recipients see their own names and the names of all other recipients on the To line of the message instead of seeing the name of the distribution list. You can easily add and delete names in a distribution list, send it to others, and print it.

Note: Distribution List are stored in Contacts.

1. **FILE, NEW, DISTRIBUTION LIST** from the menu.
2. Type a **NAME** for the distribution list then click on the [Select Members...] button.
3. Select members from the **GLOBAL ADDRESS LIST** *(internal)* and/or from your **CONTACT** list.
   (Use the drop-down arrow next to Global Address List to switch to Contacts).
4. Click on the [Add New...] button and fill in the dialog box.

Note: *If you would like Outlook to add this person to your Contacts List, check* ***ADD TO CONTACTS****.*

5. Click on the [Save and Close] button and the Distribution List appears in Contacts.

Calendar

Go To a Date

1. Press **CTRL + G.**
2. In the **DATE** field, either **TYPE** a date or **SELECT** from the drop-down list, then click **OK.**

Using AutoDate

You may find it time-consuming to enter the exact date and time. The AutoDate feature in Outlook enables you to type a description of the date or time in as

word form. This feature enables you to quickly enter dates and times as you might naturally think of them. You can also type abbreviations for months and for days of the week:

Field	Description
Date	First of March Tomorrow Next Friday

Moving/Copying Appointments to a Different Day/Different Time

1. DRAG the appointment either to a different day or to a different time of day. To copy an appointment, hold the Ctrl key while dragging.

Scheduling a Recurring Appointment

If you have an appointment that occurs regularly, such as a staff meeting on the first Monday of every month, you can designate it as a recurring appointment. Recurring appointments need to be scheduled only once. You can set the recurrence for **Daily, Weekly, Monthly,** or **Yearly.** Each recurrence pattern has a different set of options that are displayed to the right of the list of patterns. The **RECURRENCE SYMBOL** is displayed to the left of the subject text in the Appointment form.

1. **DOUBLE-CLICK** on the Calendar when the appointment starts.
2. Type the **SUBJECT** and **LOCATION.**
3. Click on the RECURRENCE button and the **APPOINTMENT RECURRENCE** dialog box appears.
4. **SET THE OPTIONS** for the recurring appointment.
5. Click **OK**, then click the **SAVE AND CLOSE** button.

Create Appointments from E-Mails

1. **DRAG** the e-mail message from the **INBOX** onto the **CALENDAR** in the Folder List.
2. **COMPLETE** and modify any appointment information, then click **SAVE AND CLOSE.**

Scheduling Meetings

Scheduling a meetings involves inviting people to attend and as well as other resources that you might need, such as a conference room.

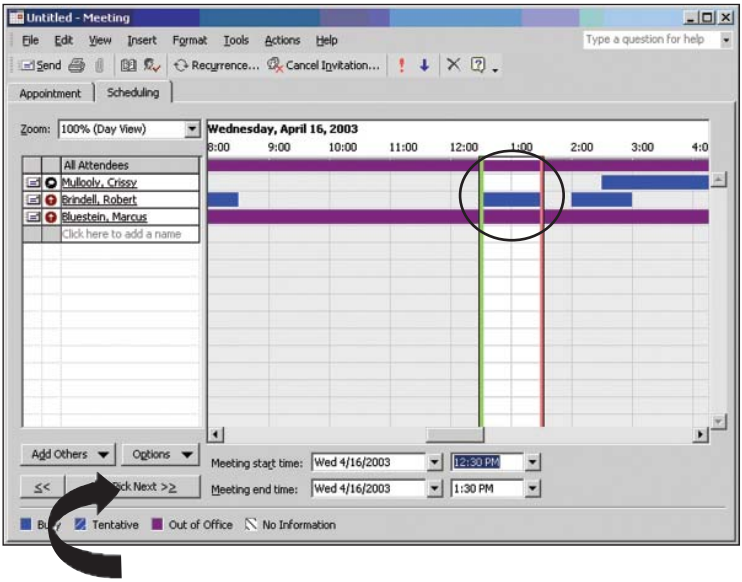
1. **DOUBLE-CLICK** on the Start Time of the meeting.
2. Fill in the **SUBJECT, LOCATION, START** and **END TIME** of the meeting.
3. Click on the

button.
4. Click on the **TO** button and **DOUBLE-CLICK ON EACH USER** you are

inviting to your meeting. By default the users you double-click on will be added to the **REQUIRED** list, indicating that they are required to attend. If you would like to indicate that it is not mandatory for them to attend, click on the user and click on the **OPTIONAL** button.

5. Click **OK** and those users should now appear in the **TO** field.
6. Click on the **SCHEDULING** tab

to see which of the users you invited are actually available:

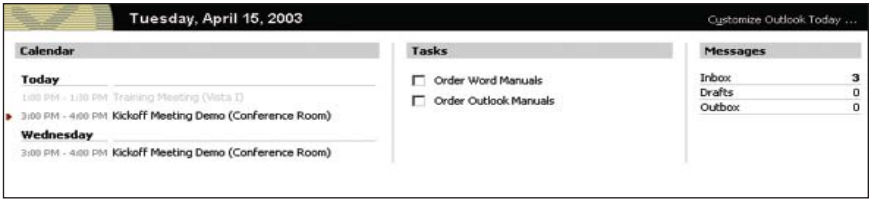


7. Click on the

button if you see conflicts with the users you invited and have Outlook pick the day and time when all the invited are free.
8. When finished, click on the **SEND** button.

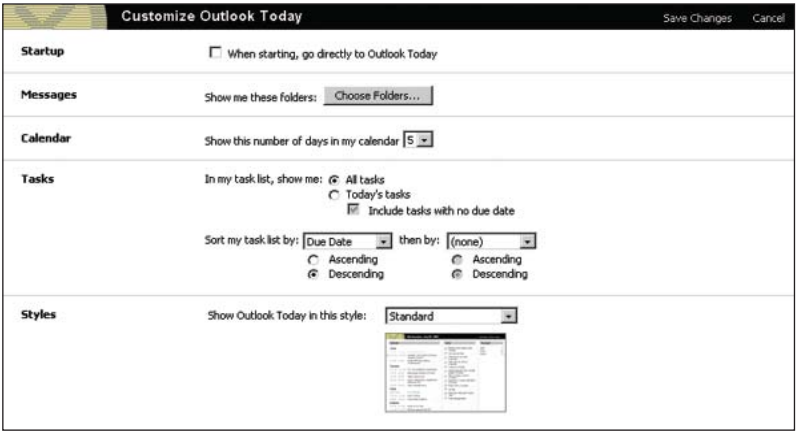
Outlook Today

Outlook Today provides a snapshot view of important information for the current day's events in one location. Outlook Today displays your appointments for the day, a list of your tasks and the number of unread messages in your Inbox, as well as items in your Draft folder and Outbox.



Customize Outlook Today

1. Click on **YOUR NAME** at the top of the Navigation Pane. This will bring up Outlook Today.
2. At the top right click on CUSTOMIZE OUTLOOK TODAY:



3. Choose from the following options:

Outlook Today	Description
Startup	Each time you start Outlook the Outlook Today page will be displayed.
Messages	Specify which folders you to display on the Outlook Today page.
Calendar	Specify the how many days of appointments should be displayed for on the Outlook Today Page.
Tasks	Specify the tasks that should be displayed on the Outlook Today page.
Styles	Change the look of the Outlook Today page.

4. When finished, click on **SAVE CHANGES** to return back to the Outlook Today.

WORD

Show/Hide

Word can display a number of special symbols on the screen that indicate each time you have pressed the Enter and Tab keys, among others. These nonprinting characters are useful when you are editing documents.

1. Click on the **SHOW/HIDE** ¶ button from the Standard toolbar.

Date and Time

You can type the date manually or you can insert the date as field so it updates automatically. To insert the date to have it automatically update in your document:

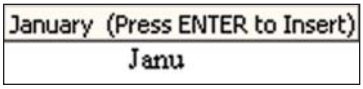
1. Click on **INSERT, DATE AND TIME** from the menu.
2. Select the date format you would like to use.
3. Check the option **UPDATE AUTOMATICALLY,** and then click **OK.**
   Note: When you turn on Update Automatically the date will be inserted into the document as a field and will automatically updated when the date on the system changes.

Viewing Fields in a Document

1. Choose **TOOLS, OPTIONS** from the menu.
2. Click on the **VIEW** tab and make sure **FIELD SHADING** is set to **ALWAYS.**
3. Click **OK.**

AutoComplete

When you type the first four letters of some common words, such as days of the week or months of the year, Word will suggest the complete word or phrase. This feature is called AutoComplete. When the suggestion appears, simply press the Enter key to accept the suggestion, or just keep typing to reject it.



AutoText

AutoText offers a way to store and quickly insert text, graphics, tables and other items that you use frequently. Although Word comes with a number of built-in AutoText entries, you may also want to create AutoText entries on your own.

Create AutoText Entries

1. **TYPE AND FORMAT** the text you want to store as AutoText.
2. **HIGHLIGHT** the text.
3. Choose **INSERT, AUTOTEXT, NEW** from the menu.
4. Accept the name provided, or type a new name. If you plan to insert the entry using the keyboard, the name must contain at least four characters.
5. Click **OK.**

Inserting AutoText

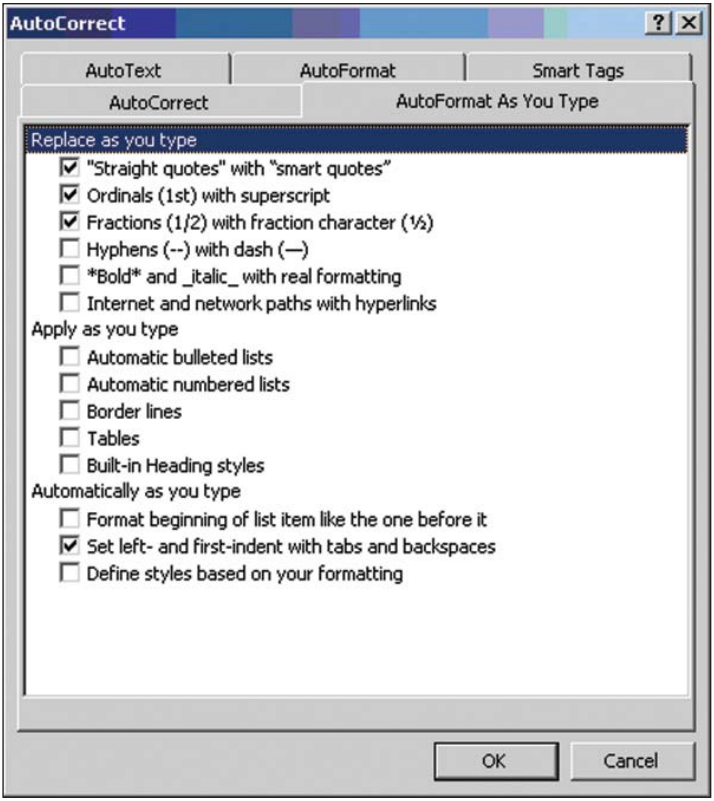
1. Click in the document where you want to insert the AutoText entry.
2. **TYPE THE FIRST FOUR CHARACTERS** of the AutoText entry, press Enter when you see the suggestion.

AutoCorrect

1. Click on **TOOLS, AUTOCORRECT OPTIONS** from the menu.
2. Click on the **AUTOCORRECT** tab if necessary and set your options.
3. Add/Delete any AutoCorrect words that interfere with your work.

AutoCorrect and AutoFormat As You Type

1. Click on **TOOLS, AUTOCORRECT OPTIONS** from the menu.
2. Click on the **AUTO FORMAT AS YOU TYPE** tab.
3. Recommended settings follow.



Reveal Formatting

As you work with your document, you may want to **REVEAL FORMATTING** that is being used in a particular area of the document. The Reveal Formatting task pane gives you an insight on how a document has been formatted. As you view the formatting details, you can click on the blue links to access the dialog boxes where you can revise that particular formatting.

1. Click on **FORMAT, REVEAL FORMATTING** from the menu and the Reveal Formatting task pane is displayed at the right.
2. In the document, select the text that you want to inspect.
3. In the Reveal Formatting task pane, **CLICK ON THE BLUE LINKS** to modify the formatting.

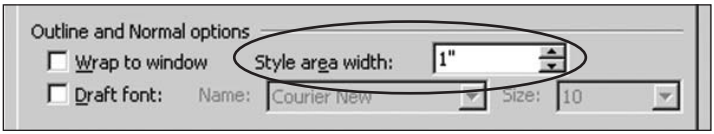
Displaying the Style Area Width

The **STYLE AREA WIDTH** enables you to view all styles in a document. When displayed, the Style Area Width will list every style being used in the document to the left of the text to which it is applied.

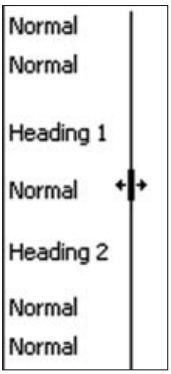
Note: *You can only see the Style Area Width when you are in the Normal view.*

1. Choose **TOOLS, OPTIONS** from the menu.

2. Click on the **VIEW** tab.
3. Change the **STYLE AREA WIDTH** to **1"**.



4. Click **OK.**
5. Make sure you are in the **NORMAL** view, choose View, Normal from the menu.
6. Observe the style area which is displayed at the left of your screen:



Resize Style Area Width

Place the mouse on the line between the style area width and the document until it becomes a two-headed arrow and drag the mouse to widen the style area.

Applying Styles

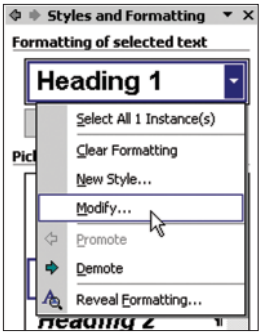
1. Click on the **STYLES AND FORMATTING** button to display the Task Pane at the right.
2. **CLICK IN THE TEXT** where you want to apply a style.
3. **CLICK ON THE STYLE** you want to apply.
   Note: *If the style you want is not listed, click on the drop-down arrow next to Show and choose* ***All Styles.***

Modifying Styles

As mentioned earlier although you cannot delete built-in style, you can **MODIFY** them. When you modify a style, you are changing the formatting of the style and therefore all text within the document where that style was applied also reflects those changes.

1. Make sure the **STYLES AND FORMATTING** task pane is displayed, if not click this button.
2. Position the mouse on the style in the list you wish to modify, but *don't click.*

3. Click on the **DROP DOWN ARROW** that shows up next to the style name.
4. Click on **MODIFY.**



5. Make your formatting changes from this dialog box.
6. If necessary, click on the **Format** button to see additional formatting options available:

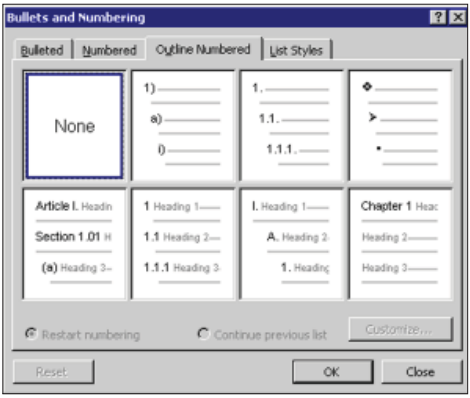
Format	To Modify
Font	Font, Size, Bold, Italic, Underline, All Caps, etc.
Paragraph	Alignments, Indentation, Spacing Before and After, Line and Paragraph Spacing, Keep with Next, Keep lines together, etc.
Tabs	Set and clear tabs.
Borders	Apply or Remove Borders and Shading.
Language	Designate the language of the text. The Spell Checker automatically uses the dictionary for the designated language.
Frame	Insert or Remove a frame around an object or picture.
Numbering	Modify the Number Format, Style, Number Position and Text Position.
Shortcut Key	Assign a shortcut key to a style.

7. Click **OK** and **OK** again, then click **Close** to close the Modify Style dialog box.

Word's Built-In Outlines

Typically you will need to customize one of the built-in outlines that are available in Word.

1. Choose **FORMAT, BULLETS AND NUMBERING** from the menu.
2. Click on the **OUTLINE NUMBERED** tab:

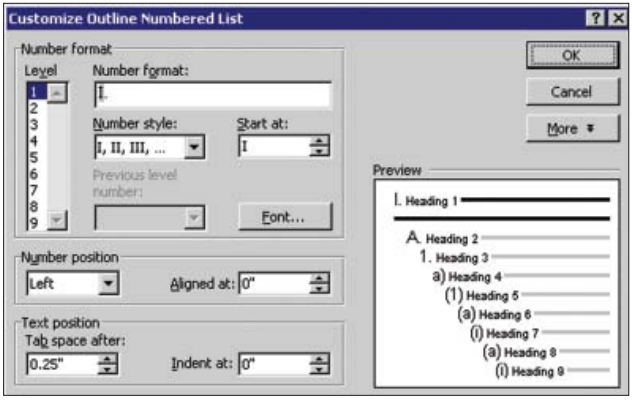


Notice the four outlines on the bottom row are all associated with Word's built-in Heading styles:

Heading 1
Heading 2
Heading 3

3. **CLICK ON AN OUTLINE** that closely relates to the one you will be using in your document.

4. Click on the **CUSTOMIZE** button and the Customize Outline Numbered List dialog box appears allowing you to view how the selected outline is currently setup:



5. When finished making your modifications, click **OK** back to the document.

Track Changes

To facilitate online review, Word allows you to make and view tracked changes and comments in a document. In order to preserve the layout of your document, Word shows some markup elements in the text of the document while others are displayed in balloons that appear in the margin.

With the Track Changes feature turned on, each insertion, deletion, or formatting change that you or a reviewer makes is tracked. As you review tracked changes, you can accept or reject each change.

Turn On/Off Track Changes

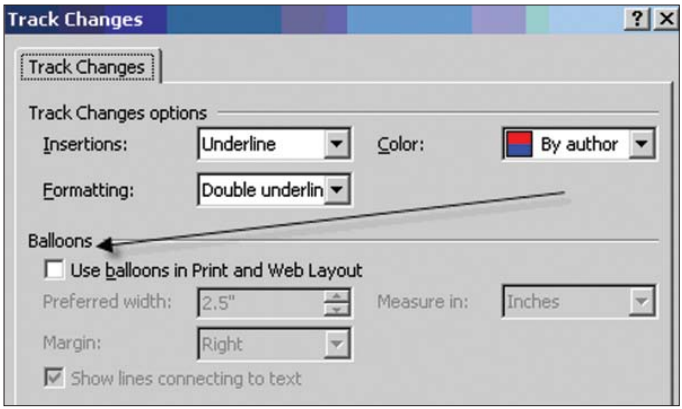
1. Double-click on **TRK** on the Status Bar at the bottom of the screen (same as clicking on **TOOLS, TRACK CHANGES** from the menu).
2. The **REVIEWING** toolbar is displayed and **TRK** appears enabled in the Status Bar at the bottom of the screen.

Final Showing Markup

1. If markup is not already displayed in your document, click on the drop down menu and choose **FINAL SHOWING MARKUP** from the menu.

Turn off Balloons in Print layout

1. Click on the **Show** drop down menu.
2. Choose **Options** and **Uncheck Use balloons in Print and Web Layout.**



About the Slide Master

The slide master is an element of the design template that stores information about the template, including font styles, placeholder sizes and positions, background design, and color schemes. The slide master's purpose is to let you make a global change — such as replacing the font style — and have that change reflected on all the slides in your presentation. You would typically go to the slide master to:

- Change the font or bullets on all slides;
- Insert art — such as a logo — that you want on all slides;
- Change placeholder positions, size, and formatting on all slides.

You can make changes to the slide master just as you would change any slide. The text on the master is only for styling. Actual slide text, such as titles and lists, should be typed on the slide in normal view (or, for headers and footers, in the Header and Footer dialog box). When you change the slide master, changes you have made to individual slides are preserved.

View/Close the Master Slide

1. Click on **VIEW, MASTER** and **SLIDE MASTER** from the menu.
2. Click on **VIEW, NORMAL** when finished modifying the Master.

Omit Background Graphics from Master

Keeps the master's graphics and text from being displayed on the currently selected slides.

1. **SELECT THE SLIDE(S)** and click on **FORMAT, BACKGROUND** from the menu.
2. Check the option, **OMIT BACKGROUND GRAPHICS FROM MASTER.**
3. Click **APPLY** to apply to only the selected slides.

Reapply the Master font style and size

If you have changed the placeholders or fonts on a slide, you can reapply the placeholder properties and fonts from the slide master by selecting text and pressing Ctrl + Spacebar (this works in Word too!).

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