

# Introduction

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Wow, here we are again. When I wrote the first book (*The Lawyer's Guide to Microsoft Outlook 2007*) my goal was to help lawyers utilize more of the power of Microsoft Outlook. Well, now we have a new, and even more powerful, version of Outlook to work with, and my goal is still the same—to help you more effectively utilize Outlook in your daily practice.

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“Give me six hours to chop down a tree and I will spend the first four sharpening the axe.”

—Abraham Lincoln

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I realize that a lot of you never even saw Outlook 2007. As lawyers tend to do, you may have used Outlook 2003 (or 2000!) right up to the bitter end and then jumped right past Outlook 2007 and into Outlook 2010. So in this book I'm going to introduce you to the great new stuff in Outlook 2010 and show you how to use it, I'm also going to help you understand the Ribbon interface that may be new to many of you. For those of you who bought the first book though, I think you're going to find some new and nifty things in this one.

Second, we're going to have more content on customizing Outlook. Outlook uses a lot of views, and there is some benefit to customizing them in certain circumstances. I recently spent some time coaching an attorney on using Outlook 2010, and it became obvious how the power of using views would be a great benefit to him. And there is some automation you can introduce to Outlook to simplify repetitive tasks.

If you loved the last book, I think you'll love this one too. If you hated the last book . . . well, thanks for giving me another chance.

So once again, I'm going to tell you about Outlook through my eyes—the eyes of a now fifteen-year veteran of Microsoft Outlook who is also a twenty-two-year veteran of law office technology. I'm hoping that you'll keep turning the pages because every new page will bring a series of moments: “gee whiz” moments, “holy cow!” moments, and “light bulb” moments. Hopefully, you'll put this book down repeatedly as you rush to your computer to try a new trick. If this book ends up on your desk with a colorful array of sticky notes protruding from the pages, then I'll know I've succeeded again.

## Why E-mail Matters

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This almost seems like it shouldn't need any explanation, but e-mail has become one of the most popular methods for business, and even personal, communication. Fax volume has declined precipitously as e-mail has replaced faxing as the preferred method for sending documents. E-mail is convenient, asynchronous, effective, inexpensive, and accessible. Even my grandparents have e-mail and know how to use it. Your clients, coworkers, co-counsel, experts, opposing counsel and even the courts are all using e-mail all day, every day. Outlook, the Microsoft Office e-mail client, is the application that Microsoft Office users have open on their computers more than any other program in the suite. (How do we know that? Keep reading.)

E-mail has the advantage of the written word—you can craft and edit your message before transmitting it. E-mail can be preserved and shared. It's easy to save messages for future reference or share them with colleagues and coworkers for collaboration.

### **Asynchronous?**

E-mail is an asynchronous method of communication. That means that the two parties don't have to communicate with each other at the same time. I can send you an e-mail, and you can read it three hours from now and then reply tomorrow. A telephone is an example of synchronous communication. Unless you reach an automated attendant—then nobody is communicating.

E-mail can contain more than just plain text. Thanks to HTML, e-mail can contain all kinds of rich content, from images to tables, charts, and more.

If you want to practice law today, you need to effectively utilize and manage e-mail. Probably *a lot* of e-mail. In fact, you probably have to manage so much e-mail that you are nearly getting buried by it. In this book I'm going to

try to offer you some tips and tricks for effectively managing large volumes of e-mail.

## What's Outlook?

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Microsoft Outlook is Microsoft's personal information manager (PIM) software as well as its premier e-mail client. Though most people think only about the e-mail capabilities of the program—which maps nicely to how most people seem to prioritize their software usage these days—Outlook is also a very capable task, contact, and calendar manager. You can use it to manage your schedule or the schedule of a team. You can use Outlook for task management. You can use Outlook to log and track phone calls, meetings, and correspondence. You can use Outlook to manage a list of contacts and to initiate merges with Microsoft Word to create personalized letters or other documents.

Outlook is a lot more than just e-mail. In this book we're going to try to help you get the most out of it so you can practice more effectively.

Let me take a moment to point out that the Outlook we're talking about is *not* Outlook Express. Despite the confusingly similar names, Outlook Express is a totally different product from Microsoft Outlook. Outlook Express, which was renamed Windows Live Mail in the more recent versions, is a basic e-mail client with virtually none of the other capabilities of Microsoft Outlook.

## Those Who Love Software or the Law Should Not Watch Either Being Made

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The development of Office 2010 built upon the tools and techniques used to develop Office 2007, so let's take a moment to talk about how the Office 2007 suite was made. The story really begins with Office 2003. When you installed Office 2003, a funny little icon was added to the system tray (down on the task bar, next to the clock) where it sat there, mysteriously staring at you. Eventually you clicked on it, and when you did, a dialog box offered to let you opt in to something called the Customer Experience Improvement Program (CEIP). The Customer Experience Improvement Program sends a lot of non-identifiable data back to Microsoft about how you actually use its software. Don't worry; the CEIP doesn't send actual documents or e-mail addresses or anything like that. Instead, it's primarily concerned with *how* you use the software—which buttons you click, how many documents you have open, how many sub-folders you create, how

long you spend in each program (that’s how we know that Outlook stays open longer than any other Office application), and other similar data. This data (known internally at Microsoft as “SQM,” or “Service Quality Monitoring,” data) helps the Office team better understand how real users use the product in their daily work.

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“Designing Microsoft Office is like ordering pizza for 400 million people.”

—Steven Sinofsky,  
Microsoft

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Prior to the CEIP, boxes of dry erase markers were used in brainstorming sessions. Huge quantities of Chinese food were consumed behind one-way mirrors in the usability labs, and survey after survey after survey was analyzed, all in the name of trying to figure out how users actually used the products. The results of all of that work became Office XP. Clearly a better way was needed, and the CEIP is it. Microsoft receives a mind-boggling volume of data from the CEIP; in fact, it has received literally *billions* of sessions of Office usage. That data taught a lot of interesting, useful, and surprising lessons and was of tremendous help in designing Microsoft Office 2007. As a result, Office 2007 was the first version of Office that was really built with volumes of direct feedback from real end users in real-life situations. Office 2010 is the next and builds nicely on the experience gained with 2007.

Those results can be seen in several areas, most notably the user interface (UI) where the old “File, Edit, View” menu structure in Outlook has been replaced with what is called the Ribbon. Outlook 2007 had the Ribbon only in the item inspectors (the window you see when you double-click to open an item) but not the Outlook Explorer (the main window that shows you lists of your items). The Outlook team didn’t have time to do the full Ribbon for the Explorer window in Outlook 2007. In Outlook 2010 that work is done, and the Ribbon—the *new* Ribbon—is now ubiquitous. The Ribbon (shown in Figure 1.1) is intended to be a more discoverable interface where every feature in the product is easy to find and use. The CEIP data was used to lay out the Ribbon, placing the most popular commands where they can be most easily found and used. Another way the CEIP data was used was to find out which desired features—features that users asked for—were rarely used, indicating that they were too hard to find.

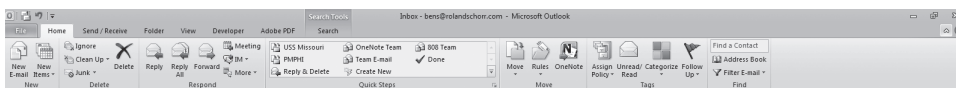


FIGURE 1.1

One key indicator that Office needed a new UI was that four of the top ten feature requests received from Word 2003 users were for features that were already in the product.

People just didn't know how to find them! According to Jensen Harris, group program manager for the Microsoft Office User Experience Team (which means he was the lead dog on the team that designed the Ribbon), features like adding a watermark to Word documents were so hard to find that a lot of users asked how to do it or didn't realize you could. With Word 2007 the feature became prominently located on the "Page Layout" tab, and Jensen had a lot of users comment on what a "great new feature" it is.

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The most commonly clicked toolbar button in Microsoft Word 2003—and it's not even close—is "Paste." This is followed in order by "Save," "Copy," "Undo," and "Bold."

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## And Now, by Popular Demand . . .

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Since you've probably already bought Outlook 2010 (seeing as you're reading a book on it), I'm not going to try to sell you on why you should get it. Let me just briefly highlight some of the key new features of Outlook 2010 that lawyers are going to love. I'll explain them in more detail later in the book but here's the teaser. . .

1. Ignore Conversations—a quick way to get your in-box under control by "opting out" of message threads you don't care about.
2. Improved RSS Aggregator—subscribe to blogs and newsfeeds with Outlook and get those items right alongside your mail if you use search folders.
3. QuickSteps—lets you automate a lot of message management tasks.
4. New views in the Calendar—improved views and color-coding make the calendar easier and more productive to use. (See Chapter 5.)
5. Easy categorizing and flagging of messages for follow-up.
6. New and improved "Find Related" tools.
7. The new Ribbon. As I mentioned above, the interface has changed quite a bit in the new version.
8. Outlook Social Connector (OSC)—the OSC lets you integrate content from other sources (SharePoint, LinkedIn, Facebook, and more) so you can get a more complete picture of your contacts within Outlook. And you can more easily find other messages, attachments, and other content from those users.

There are a lot more new features, like improved security and anti-phishing capabilities, postmarks, Free/Busy information management, 32- and 64-bit versions, and other subtle additions that will really excite your consultant or IT person but might be a tad esoteric for you. I'll mention them throughout the book, but mostly I want to focus on the features and tools that you're really going to use and care about in your daily practice. If you really embrace Outlook as a personal information manager, and not just an e-mail client, you'll realize the true power of the product.

So, let's get right into it. Turn the page for Chapter 2: A Tour of Outlook.

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