

Microsoft Outlook 2010 from the Keyboard



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Microsoft Outlook 2012 from the Keyboard

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Author's Note

This book is based on the work and experience of Karen McCall. This book was written as a best practices guide for working with accessible Microsoft Word based documents. These are the techniques that have worked or not worked for me and I decided to share them with others who are working in the area of accessible document design.

Dedication

This book is dedicated to Joyce Malombe, Aimee and Greg Todd ...and to my "live in" friends Barnaby Edmund, Zoir Robert, and Olivia Zane...who all keep me focused and somewhat sane.



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Introduction

Outlook 2010 continues the implementation of the Ribbons which are used in all other Office applications. The Ribbons are grouped by task such as Send/Receive, Folder and View. The Home Ribbon has most of the tools you'll need to manage your mail. When you create a new mail message, task, calendar item or contact, the "new" item will have its own set of Ribbons and tools. T

As with other Office applications, Outlook will display Sub-Ribbons for any images, charts, tables or other elements you place in a message. A "Word" template is now integrated into Outlook so that you can have Outlook installed on your computer without having Word installed.

In Outlook 2010 you can add images complete with Alt Text and captions to e-mail messages. It is easy to switch accounts when sending e-mail messages and there is a To Do Pane that lets you review your tasks and items marked for follow-up quickly without having to move from your Inbox.

This document assumes that your default e-mail account has been set up and is ready to use.

Installing Additional Sounds

You may want to investigate the Microsoft Office sounds which are available on the Microsoft web site and are a free download. These additional sounds provide auditory feedback in Office applications and don't interfere with your adaptive technology. The type of feedback they provide, for example, is to provide a sound when you delete a message, when you press Enter after typing in a search term [to let you know that search results are visible], and to indicate when saving a file is complete.

You can [download the Office Sounds](http://www.microsoft.com/en-us/download/details.aspx?displaylang=en&id=7015)¹ from the Microsoft web site. They are a seamless plug-in and will work with Office 2010.

¹ Microsoft Office Sounds download web page: <http://www.microsoft.com/en-us/download/details.aspx?displaylang=en&id=7015>

Reading Layout in Microsoft Word

One of the things you need to do before working in Outlook is done in Microsoft Word. If you have been using Word, you've probably already done this; however, if you are learning Word and Outlook at the same time, you may not.

If you open a Word or .doc attachment from Outlook instead of saving it to your computer, it will open in "Reading Layout." Other documents may occasionally open in Reading layout. Reading Layout is not accessible to adaptive technology. You will want to turn this off to avoid frustration.

To do this, launch Microsoft Word.

1. Press Alt + F, T to open the Word Options dialog.
2. The General category will be the first category of options.
3. Press Tab to move into the General options.
4. Press Alt + F to move to and uncheck the check box to open e-mail attachments in Full Screen Reading Layout. You can Tab to this item and use the Spacebar to uncheck it as well.
5. Tab to the OK button and press Enter.

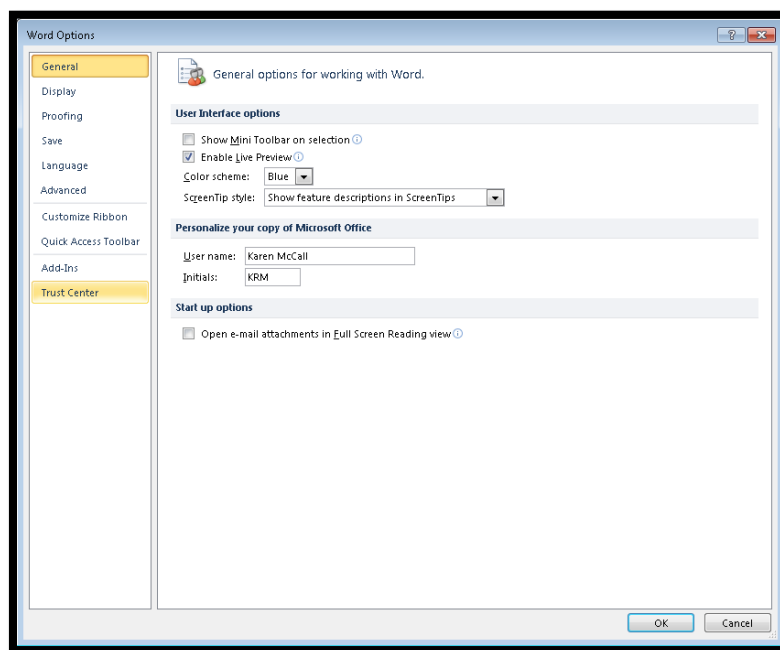


Figure 1 Word Options dialog showing the General category.

We'll explore other Outlook options in the last topic of this book.

Setting Inbox as the Default

The next thing to do is to have the Inbox visible at the start of Outlook rather than the personal folders screen. Usually the personal folders are the default screen when Outlook is installed.

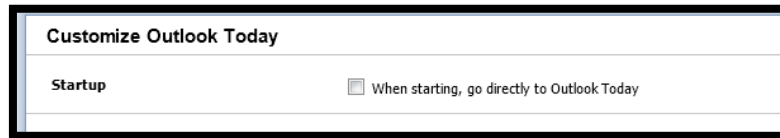


Figure 2 Personal Folder setting to make Inbox the default view.

To modify the launching task:

1. Move to the Navigation Pane by pressing F6 until you hear "Personal Folders open".
2. Items in the navigation Pane aren't selected as you arrow through them, but your focus is on them. Press Enter to select items in the navigation Pane.
3. This will automatically put focus on the first item in the Personal Folder options which is Customize Outlook Today.
4. If you get lost, you can press Alt + U to Customize Outlook Today. JAWS 13 won't read this so you may have to use the JAWS cursor.
5. This changes the screen and shows you the things you can modify.
6. Uncheck the check box "When starting, go directly to Outlook Today." It is the first check box in the list of options.
7. Press Shift + Tab until you get to the Save Changes link and press Enter. That used to be the Customize Outlook Today is now the Save Changes link.
8. Press Alt + F4 to close Outlook then launch it again.

Outlook will now open with the Inbox visible and ready to use.

You can explore other options in the Personal Folders options; however, this is the only one we need to modify.

Reading Pane

The Reading Pane visually displays the content of incoming messages as you move through the list of messages. The Reading Pane can be to the right or bottom of the list of messages in your Inbox. If you use a screen reader you can use F6 to move from a message in your Inbox list to its contents. Press Shift + F6 to move back to your list of messages. The Reading Pane lets you review or read messages without opening them. If a message is HTML and is heavily formatted, you will need to open the message and then open the message in your browser...but we'll get to that.

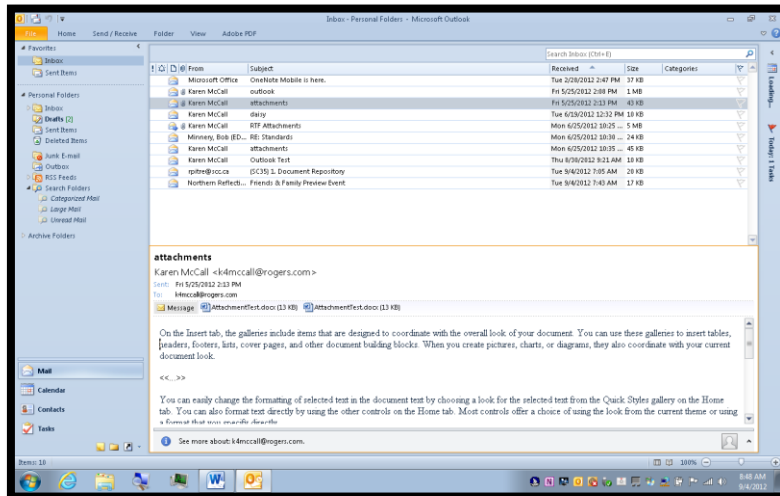


Figure 3 Reading Pane in Outlook.

The options are to have it on the right of the list of messages [the default] or at the bottom of the list of messages.

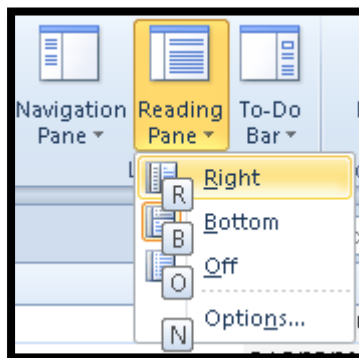


Figure 4 Reading Pane options from View Ribbon.

To turn off the Reading Pane or modify its location:

1. Press Alt + V for View.

2. Press P, N to open the list of Reading Pane options.
3. Press R for Right, B for Bottom, letter O for Off or N for Options.

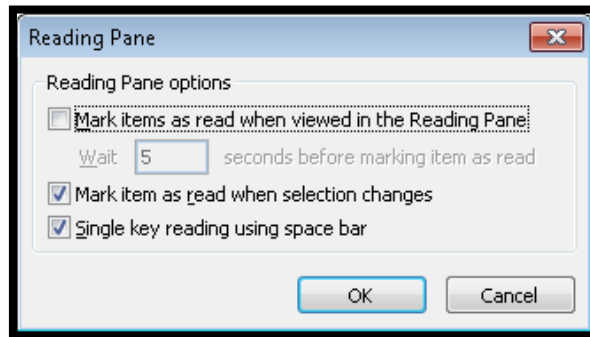


Figure 5 Reading Pane options dialog.

The Reading Pane options let you decide whether to mark messages as read once you've gone into the Reading Pane or not.

The use of the Spacebar to read messages is not available to JAWS in Outlook 2007 or above.

Auto Preview

The Auto Preview tool can be more effective if you are using a screen reader and want to take a peek at the contents of a message without opening it. If the Auto Preview is turned on, you will hear the general message information as well as the first two or three lines of the message as you move through the list in the Inbox. Using this tool, you don't have to move to another pane for information, it is right there as you arrow through your list of messages.

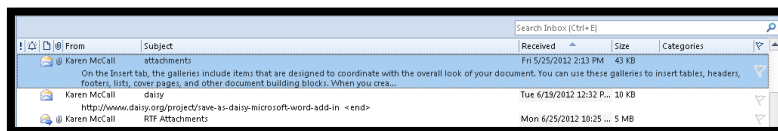


Figure 6 Preview pane turned on in Outlook.

To turn the Auto Preview on:

1. Press alt + v for view.
2. Press V again for View Settings. This opens a dialog. .
3. Once the View Settings dialog opens press Alt + letter O for Other Settings. This opens another dialog.
4. Press Alt + M to preview all messages or Alt + U to preview only unread messages.

5. Tab to and activate the OK button.
6. You are returned to the View Settings dialog.
7. Tab to and activate the OK button.
8. –mail messages now show the first few lines of text. JAWS will read this automatically as you arrow up or down through the list of messages.

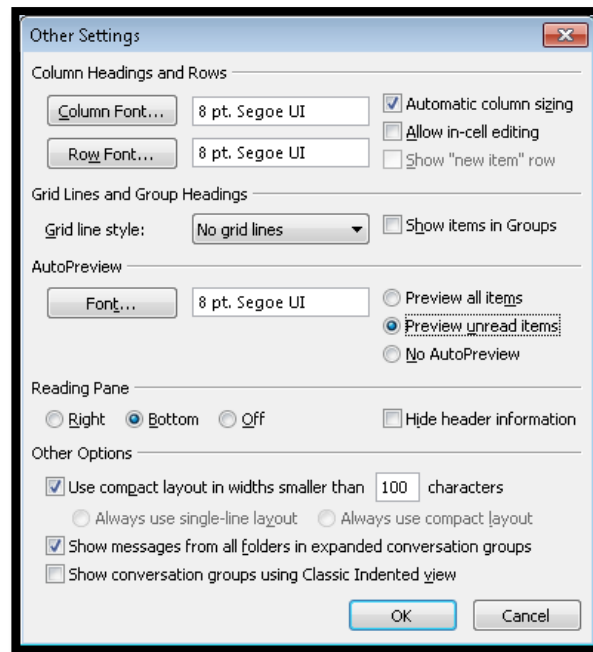


Figure 7 Custom Settings dialog showing settings for Preview Pane.

There are other options specific to tools in Outlook that will be discussed as we come across them.

JAWS Navigation Commands for Outlook

The following keyboard commands are not the complete list available in the JAWS Outlook help files. Information on accessing the help files follows this section on navigation.

Each e-mail message has header information. Header information includes who the message is from, the date it was received, the subject and in some cases, warning messages indicating the importance of a message or if it's a message requiring a vote.

If you have a message open, you can press the following keyboard commands to gather header information for the open message:

- Alt + the number 1 will read the first piece of header information, the From field.

- Alt + 2 will read the second piece of header information, the date the message was sent.
- Alt + 3 will read the third piece of header information, the To field.
- Alt + 4 will read the CC field.
- Alt + 5 will read the Subject.
- Alt + 6 will read the BCC field as you are composing a message. Note that when you get a message, you don't see who the message was BCC'd to.
- You can use sequential keystrokes to read up to header 11. The complete list of header keystrokes can be found in the JAWS help file for Outlook.

Press JawsKey + A to get a list of attachments for the current message. If you are in the list of messages, JAWS will say "Not in an open message." You can use this keyboard command while in the Reading Pane or an open message. Your focus will be on the attachment text and you will need to use the Right Arrow to move to the first attachment. You can then use the Left, right, Up or Down Arrows to locate a specific attachment and open it. The Arrow keys you can use will depend on the number of attachments.

If you are composing a message, you can use the keyboard commands listed above to read information you've entered in any of the edit fields. To move to an edit field and add information, use the following keyboard commands:

- Alt + 2, 2 moves you to the To field.
- Alt + 4, 4 moves you to the CC or Carbon Copy field.
- Alt + 5, 5 moves you to the Subject field. You can also press Alt + U.
- Alt + 6, 6 moves you to the BCC field if it is visible.

There are other useful JAWS commands you can use to move quickly to the information you want.

In an open message, pressing Alt + ` will move you to the body text of a message. The ` key is located just under the Escape key on most standard keyboards.

If you press Shift + ` you will get a ~ which is used in some web page addresses.

Pressing Alt + ` moves you to the body of a message if you are in the Inbox with the Reading Pane open or if you are composing a message.

Outlook Message List Orientation

In the list of messages, there are several columns. From left to right, they are:

Importance which is the picture of an exclamation mark. If you have a message that is marked high importance, an exclamation mark appears in this column next to the message.

Message status which is the picture of a small document. If a message is unread, a small envelope appears in this column. If the message is read, the envelope is open. If you reply to the message an arrow going “backward” appears on the opened envelope; if you forward a message, an arrow going “forward” appears on the open envelope.

Attachment which is a picture of a paper clip. If there is an attachment, a small paper clip appears in this column next to the message.

If you have Conversation view turned on, any messages that are threaded or part of a conversation will be shown in a column just before the sender information of an e-mail. JAWS does not support conversation view. It is suggested you turn conversation view off. This is different than show in groups.

The next columns are From, subject, Received [date and time you received the message], size [the size of the message], and the last column is for messages that have been flagged for future action. If you flag a message, a small flag appears in this column next to the message.

If you use Categories with e-mail messages and tasks, JAWS will not read any flagged and categorized items, only flagged items.

General Outlook Commands

To move among the tools such as Mail, Calendar or Contacts:

- Press Ctrl + 1 for Mail
- Press Ctrl + 2 for Calendar
- Press Ctrl + 3 for Contacts
- Press Ctrl + 4 for Tasks
- Press Ctrl + 5 for Notes which are like Sticky Notes on the Tablet OS or Post-It Notes on a basic windows OS.
- Press Ctrl + 6 for Folder List which removes the “Favourite Folders” and “All folders” sections of the navigation Pane and just gives you a list of all Folders.
- Press Ctrl + 7 for Shortcuts which are shortcuts to folders. If you are using a screen reader, the Ctrl + Y keystroke is probably faster.

- Press Ctrl + Y for Folder to go to a specific folder. This opens a dialog with a list of folders including folders you've created.
- Press Ctrl + 8 for Journal which lets you track documents associated with e-mail or contacts. This can also be done using the activities tab which is probably easier to use and offers you more flexibility.
- While in Mail view, Press Alt + B to go back to the last folder you were working in. Your focus is on the last item you placed in that folder. Pressing Alt + B again will return you to the previous folder. This is a toggle and not a way to move among all folders.

You can press Ctrl + G and "Go To" these items.

Outlook Task Specific Commands

Outlook has keyboard commands to quickly create appointments, contacts, folders and meeting requests on the fly.

- Press Ctrl + Shift + A to create a new appointment.
- Press Ctrl + Shift + C to create a new Contact.
- Press Ctrl + Shift + E to create a new folder.
- Press Ctrl + Shift + M to create a new Message.
- Press Ctrl + Shift + K to create a new Task.
- If you press Ctrl + Shift + U, you'll create a task request.
- Press Ctrl + Shift + H to create a new Microsoft Office document. This opens a dialog which lets you choose from an Excel, PowerPoint or word document.

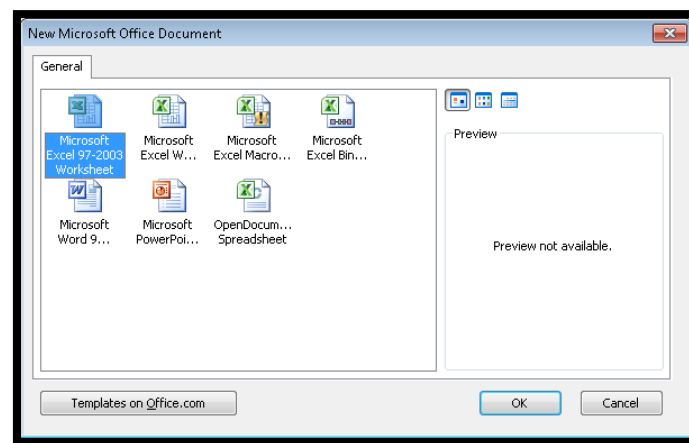


Figure 8 Create new Office document from Outlook.

Note: If you are in Mail and press Ctrl + N for New, a new mail message will appear. While in other tools such as contact, Calendar or Tasks, pressing Ctrl + N will open a new item in that tool. The keystrokes above can be use anywhere in Outlook to create the item you need when you need it.

You can create the following anywhere in Outlook:

- Distribution list - Ctrl + Shift + L
- Fax – Ctrl + Shift + X
- Meeting Request – Ctrl + Shift + Q
- Note – Ctrl + Shift + N
- Post in this folder – Ctrl + Shift + S
- Search a folder – Ctrl + Shift + P

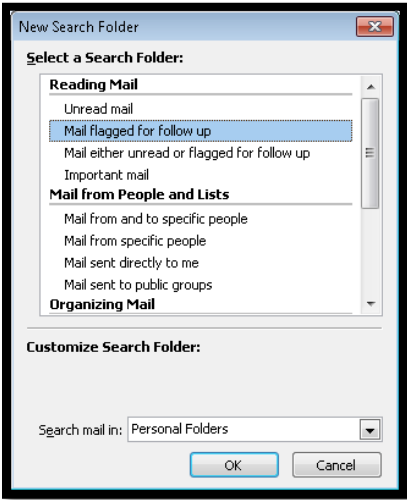


Figure 9 Search a folder dialog.

Getting Outlook Help

To get help in Outlook, press F1. Once you press F1 to open the Help Pane, your focus is moved to the Search for edit box. If you want to know the shortcut keys for Outlook, type shortcut in the search for edit box and then press the enter key. If you've installed the additional sounds, you will hear that the information in the Help Pane has changed.

Your focus is still in the search for edit box, however, it is now located near the bottom of the Help Task Pane instead of the top.

Press Shift + Tab to move backward into the list of search results. Use the Up and Down Arrows to find “keyboard shortcuts” and press Enter. You will hear some other interesting help documentation and can explore any of those topics.

When you press the Enter key on a topic, the Help Window opens displaying the document requested. The Window may be small and it is a good idea to maximize the Window to ensure that you get all the information you want [Alt + Spacebar, then X for Maximize].

You can then read the requested Help document as you would other web pages.

Here are some other helpful keystrokes for moving around the Help Pane:

Tab will move you forward an item.

Shift + Tab will move you back an item.

Up and Down Arrows will move you through the list of topics in an item.

Alt + Left or right Arrow will move you between an open Task and Help Panes.

Ctrl + Spacebar will open the dialog of Pane options. [Note that if you aren't in the Task Pane when you press this keystroke, and have the Reading Pane visible, it will close the Reading Pane]

Finding Information

To find information quickly, press F3 or Ctrl + E to show a Find bar just above the list of messages. By default your focus is in the Look for edit box.

Type in the text you're looking for

Press Enter and any items matching that search string in that mail folder will be identified.

Press F6 to move to the list of messages that were found.

Press Escape to see all messages in the mail folder again.

Advanced Find

You can search for specific information by using the advanced Find, Ctrl + shift + F. This opens a dialog asking you for detailed information on what you want to find.

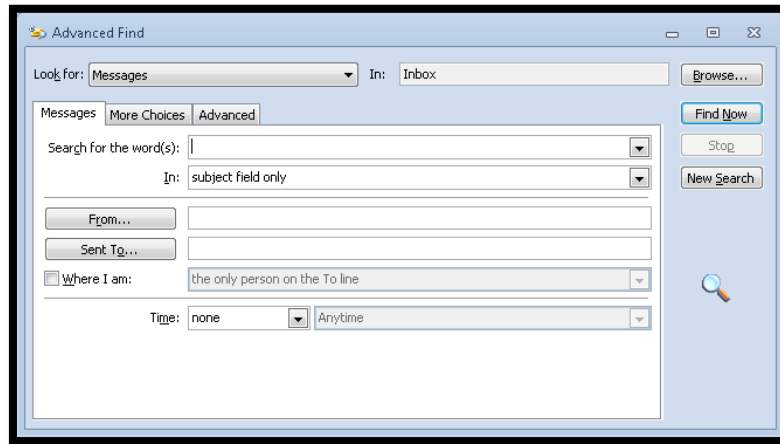


Figure 10 Advanced Find dialog.

By default your focus is in the “Search for the Word(s)” edit box. Type in the word or phrase you are looking for.

Press the Tab key to move to the “In” list box which lets you choose options like in the subject field only, in subject fields and message or frequently used subject lines.

Press Tab to move to the From button which lets you choose to look in messages from a specific person. This will open your list of Contacts to choose from.

Press Tab again to move to the From edit box where you can type an e-mail address. This will let you choose someone who isn’t in your list of Contacts.

Press Tab to move to the Sent To button which lets you choose people from your Contact list you have sent messages to.

Pressing Tab again will take you to the Sent To edit box where you can type in the e-mail address of someone not in your Contact list.

Pressing Alt + W will check the “Where I am” check box. You would use this if you want to further narrow your search. This option has an accompanying list box and you need to press the Tab key to move to it. The options include things like “where I am the only person in the To field or on the CC line with other people.

Pressing Tab again will take you to the Time area where you can identify time specific messages such as when you received them or sent them. This is composed of two list boxes; the first one identifies no

time, received, or due. Press Tab to move to the list where you can choose any time, yesterday, today or in the last three weeks.

Alt + N will start finding the next occurrence of what you are looking for.

If you press Tab again, you will move to the Messages tab. The Advanced Find has three tabbed panes, Messages, More Choices and Advanced.

If you want to find Notes, Tasks, Contacts or Appointments, press Alt + K to move to the Look for list box and use the Up or Down Arrows to make a choice. The search options will change according to what you are looking for.

You also press alt + B to activate the Browse button if you want to choose to search a different mailbox or to search several mailboxes and their sub-folders. By default, sub-folders is checked so searching the Inbox will search all sub-folders.

Mail

If you've changed the Personal Folder options to display the Inbox when Outlook first launches, this is the view you'll get. I recommend this view as it lets you get right to work on new messages that have come in or are being loaded. I don't find the Outlook today view particularly helpful or easily accessible. I have to move to the different elements of it so I might as well just get to work and view e-mail then go to the various other tools.

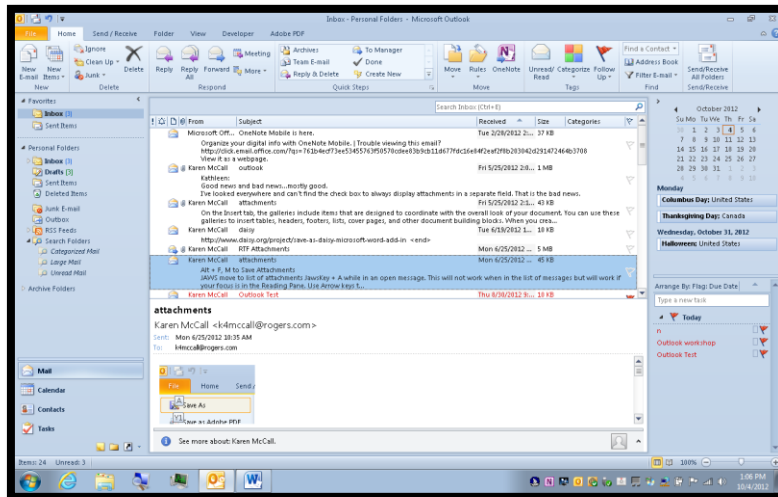


Figure 11 Outlook Mail showing full application Window.

From the top of the Outlook Window while the Mail tool is visible, the items are the Quick Access Toolbar in the upper left, the Title bar to the right of the Quick Access Toolbar, the File/Backstage area to the left and under the Quick Access Toolbar and the Ribbon tabs along the same line of the screen as the File/Backstage area moving from left to right.

Just under the Ribbons is the main area of Outlook where you can view mail folders on the left if they are not minimized, e-mail messages in the centre of the screen and you can have the Reading Pane and/or the To Do bar visible to the right of the list of messages. In the preceding image my Reading Pane is at the bottom of the screen and the To Do bar is open to the right of the list of messages.

At the very bottom of the Outlook Window is the Status Bar.

From the Inbox, if you press Ctrl + N, you will create a new message. Of course, you can use the other keyboard commands such as Ctrl + Shift + A to make an appointment while you are here in mail.

Here are some helpful generic keyboard commands for Mail:

- To check for new mail, press F9 [or you can press Ctrl + M]
- To move to the Inbox from anywhere in Mail, press Ctrl + Shift + the letter I.
- To move to the mail section of Outlook, use Ctrl + the number 1. This will take you to Mail and the folder that is active is the last one you were in.
- To switch to the Outbox, press Ctrl + Shift + the letter O. You have to be in the mail section of Outlook to do this [Ctrl + the number 1].
- Ctrl + Enter will send a message. Pressing Alt + S will do this as well.
- Ctrl + R will reply to a message. Pressing Alt + R will do this as well.
- Ctrl + Shift + R will Reply to all.
- Ctrl + F will forward a message to someone.
- If you are in a specific folder and want to send or receive messages for that folder only, press Shift + F9.
- Ctrl + Q will mark a message as read.
- Ctrl + Shift + B will display your address book. This opens your address book so you can insert a contact into a mail message. It isn't the same thing as going to your Contacts to add or modify information.

Sending and Receiving Mail

You can have several e-mail accounts set up for work, home, school and correspondence you want to remain anonymous in. If you want to have all your mail delivered at once, you can press either F9 or Ctrl +M. Pressing Shift + F9 will send and receive mail for the current folder only.

You can have your mail sent and received for individual accounts. This is helpful if you are traveling and just want to get work posts or family posts.

To send and receive mail from individual accounts, press Alt + S, G for Send/Receive, Groups. This opens a drop down list so that you can send and receive from specific accounts.

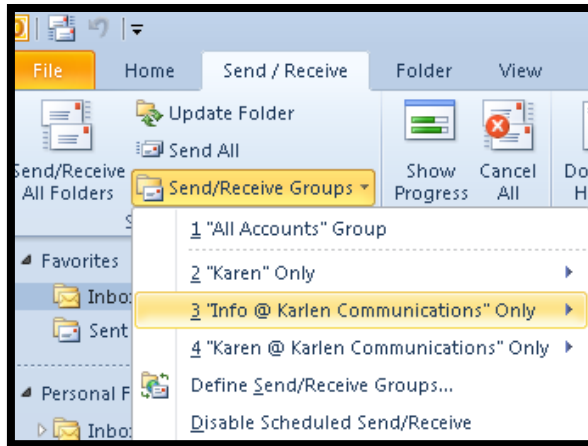


Figure 12 Send and Receive for individual accounts.

Of course, if Outlook is set up to perform automatic Send/Receive functions, it will continue to do so. You can set Outlook to only respond to manual Send/Receive activities. There is an overview of these settings under Outlook Options in this book.

Conversations and Groups

You might want to set Outlook up so that your messages are grouped by date or by conversation. Of course you can combine any views to customize your mail to the way you want it to look.

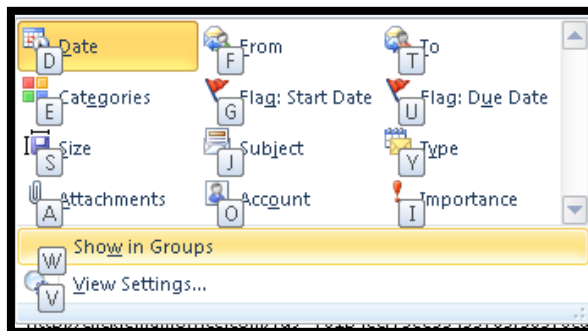


Figure 13 View Ribbon settings to customize a Mail folder.

Pressing Alt + V, A, B, W will turn the View in Groups on and pressing that keyboard command again will turn Show in Groups off.

Other View Ribbon settings that let you customize how your mail is sorted and viewed are:

- Alt + V, A, B, D for Date which is the default.
- Alt + V, A, B F for From.

- Alt + V, A, B T for To.
- Alt + V, A, BE, G for Category.
- Alt + V, A, B, G for Flag Start Date.
- Alt + V, A, B, U for Flag Due Date.
- Alt + V, A, B, S for Size.
- Alt + V, A, B, J for Subject.
- Alt + V, A, B, Y for Type.
- Alt + V, A, B, A for Attachment.
- Alt + V, A, B, Letter O for Account.
- Alt + V, A, B, Letter I for Importance.
- Alt + V, A, B, W for Show in Groups.
- Alt + V, A, B, V for View Settings which opens a dialog.

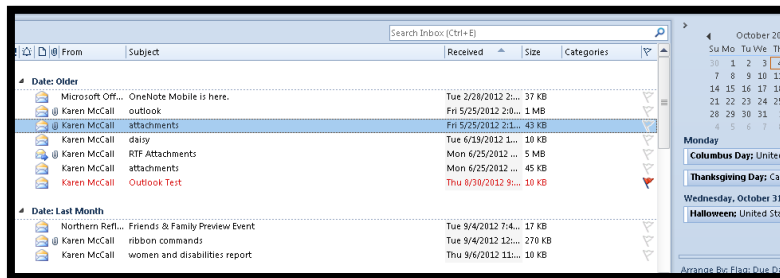


Figure 14 Mail messages shown in groups.

The next way of showing mail messages is by conversation. This threads messages together so that you can follow a discussion and easily see the first message in the conversation and the last message in the conversation.



Figure 15 Conversation view check box in the View Ribbon.

To turn on Conversation view, press Alt + V, G, C which opens a small dialog asking if you want Conversation view in all folders or just this one.

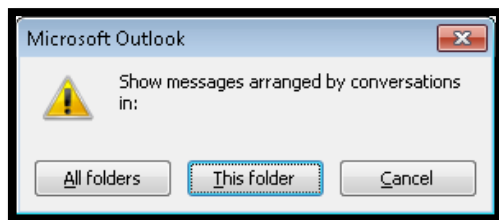


Figure 16 Dialog asking if you want Conversation view in this folder or all folders.

The following image shows a mail conversation collapsed so that you only see the hollow arrow in the right column pointing to the message. There is no other way to distinguish messages in a conversation.



Figure 17 Collapsed conversation in Outlook.

When a conversation is expanded, each message has a small yellow dot in the right column and the hollow arrow that had been pointing to the message is now a black arrow pointing downward at about a 45 degree angle so it looks like it is pointing to the expanded conversation pieces/messages. These are very small arrows and are easily missed visually. There is a thin line just above the expanded conversation which can provide more visual feedback once the conversation is expanded.

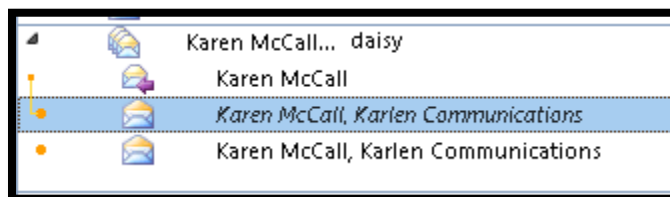


Figure 18 Expanded conversation in Outlook Mail.

Note: The JAWS screen reader does not support Conversation view. You will not know which messages are in a conversation and which are just regular messages in your Inbox or mail folder.

Create and Send a Message

To create a new mail message, press Ctrl + N while in Mail, or press Ctrl + Shift + M if you are in another Outlook tool.

1. This opens a blank message Window and your cursor is in the To field.
2. Type in the e-mail address of the person you want to send the message to [someone@internet.ca for example].
3. To access contacts from your address book for the To field, press Alt + Period which opens the list of contacts in your contacts list or address book. By default, your focus is in the edit box where you can type the first name of the person, or the nickname you have them in the contacts list.
4. You can press the Tab key once to move into the list of contacts.
5. Use your Up or Down Arrow to find the person you want. You can also press the first letter of their name to move to the first person whose name starts with that letter. This list box works the same way as standard Windows list boxes do.
6. Once you've found the person in your address book, press the Tab key or Alt + the letter O to move to the To button and press Enter. The person you've selected is now going to be in the To field of your message.
7. Press tab until you get to the OK button and then press Enter. This closes the address book and returns you to the e-mail message with your focus in the To edit box in case there are more people you want to send the message to.
8. Press Alt + U to move to the Subject line. Always make sure that you have a subject for your messages. The other thing to keep in mind is that your subject line is short and meaningful.
 - a. Also be aware of the types of subject lines used by spammers and try to avoid using things like "hi there," "thinking of you," or "here's the file" as these may be immediately discarded by the person you're sending the message to as spam. Spammers can easily use your e-mail address to send spam and we all need to be diligent against viruses.
9. Press the Tab key again to move into the edit text area of your message. You can now begin typing your message.
10. Once you've finished typing your message, press F7 to spell check it. The spell check dialog works the same way the Microsoft Word spell check works.

11. Once a final review of your post has been completed, you can send it by pressing Ctrl + Enter or Alt + S.

If someone is in your address book or you reply to them frequently, you can begin typing their name, nickname or e-mail address and auto complete will give you some options. If you have this verbosity setting turned on in JAWS, you can use your Up or Down Arrow to locate the person you want, press Enter and their e-mail address will be entered in the field.

You can use the mouse to click on anyone in the auto complete list to add their information to a field.

Auto complete works while you are in any of the fields: To, CC or BCC.

The keyboard commands for a new mail message are:

- Alt + M to change the account from which you are sending the message if you have more than one e-mail account set up.
- Alt + Period to move to and activate the To button which opens your address book.
- Alt + C to move to and activate the CC button which opens your address book.
- Alt + B to move to and activate the BCC button if it is visible which opens your address book.
- Alt + U for the Subject line.
- Alt + S to send the message once you've spell checked it.
- By default when you press Alt + N for a new mail message, your focus is in the To field. If you use auto complete you can then Tab to the other fields and use auto complete for them as well – instead of using the address book.

Draft Messages

If you are composing a message over several hours or days, you will want to save your message, open it and work on it when you have time.

Once you've created a message, press Alt + F4. You will be prompted to save the message. Choose Yes to save it. You can also use Ctrl + S to save messages you are composing as you write.

This stores your message in the Drafts folder.

To retrieve a draft message to work on:

1. Move to the navigation Pane by pressing Shift + F6 from the Inbox.
2. Select Drafts folder by pressing the letter D.

3. Press F6 to move into the list of Draft messages.
4. Use the Up or Down Arrow to locate your draft message.
5. Press Enter on the draft you want.
6. This will open it and you can continue working on it.

Once you've queued a message to send, it goes to the Outbox. If you want to check and make sure a message has been sent, first look in the Outbox.

Once it has been sent, it goes to the Sent Items folder and you can locate it there if you need to archive it or refer to it again.

Carbon Copies and Blind Carbon Copies

Just as with printed correspondence you can CC and BCC someone, you can do the same with your e-mail messages.

Carbon copy or CC [will send a copy to another person and let the person you are sending the message to know that someone else is being sent the message as a copy. The keyboard command is Alt + C to move to and activate the CC button which opens your address book.

Blind carbon copy or BCC will send a copy of the message to another person, but the person you are sending the original message to won't know this. The keyboard command is Alt + B which moves you to the BCC button and opens your address book.

If you are sending mail to a distribution list, use the BCC field to put the distribution list in. for example, if you have a group of friends and want to share the latest news on your screen reader, put your own name in the to field, and put the name of the distribution list or your friends in the BCC field. This means that none of the people you send the message to will have access to each other's e-mail address. This helps protect your friends and colleagues from having their e-mail addresses pirated or spammed. You never know who is going to forward your information to other people, or where your message and e-mail address are going to end up.

The BCC field is not visible by default. Press Alt + P, B while in a new message. This is a toggle to the Options BCC field and will either show or hide the BCC field depending on its state when the keyboard command is pressed.

There is information on creating a distribution list in the Contacts section of this document.

Spell Checking Messages

It is important to always spell check your messages before you send them.

To spell check a message, press F7 while in the message. Listen to the misspelled word and the suggested replacement.

If the word isn't in the list of suggestions, press Shift + Tab to move back to the Change to edit box select the misspelled word, and type in the proper spelling, then press Alt + C to change the word in the e-mail.

The Outlook keystrokes for the spell check are;

- ✎ Alt + the letter I will ignore one instance of a spelling.
- ✎ Alt + G will ignore all instances of the spelling.
- ✎ Alt + C will change the word to the selected word in the list or the word you've typed in the Change to edit box.
- ✎ Alt + L will change all instances of a misspelled word. For example, if you spell a word consistently wrong.
- ✎ Alt + A will add a word to the user dictionary.
- ✎ Alt + O will show you the options for the spell check.

Moving forward with the next version of Office in mind, you'll find that using Alt + F7 will move you to the next misspelled word and open the list of suggestions. This is a lot easier than the new spell check pane.

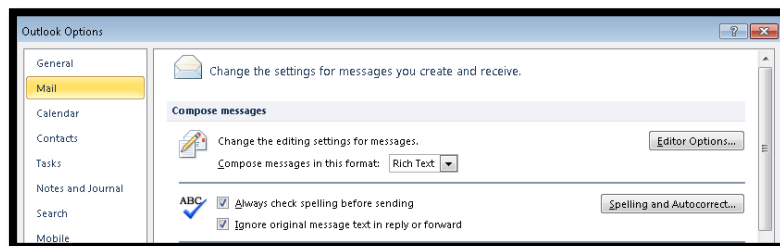


Figure 19 Spell check options for messages.

If you go into Outlook Options, Mail and check the “always check spelling before sending” option you will always have the opportunity to check your work before sending a message. The keyboard commands are Alt + F, T, then M for Mail. Tab into the Mail options and then press Alt + A to move to and check the Always check spelling before sending.

While in the Mail option, press Alt + letter I to Ignore spelling in replied to or forwarded messages. This is the check box immediately after the one to always check spelling.

It is always a good idea to proofread your messages for those pesky typos that won't be caught by a spell check (for example "sue" instead of "use").

Choosing a Mail Message Format

You can send a file as an attachment to a message.

However, if you use RTF, your attachments will be embedded in your e-mail messages. This may interrupt the flow of reading as attachments will be placed wherever the cursor is at the time you attach, or the sender attached the item. It is recommended that you use HTML as the format for e-mail messages to optimize accessibility.

One other option is Plain Text format for messages. This lets your messages download faster and you have faster/better access to the content.

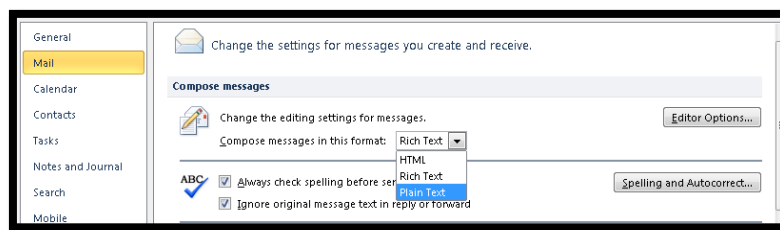


Figure 20 Options for mail message format.

To make Plain Text your default mail format:

1. Open the Outlook Options dialog while in the Inbox view of Mail. Press Alt + F, T.
2. Choose the Mail category by clicking on it or pressing the letter M.
3. Press Tab to move into the Mail options.
4. Your focus is on the Mail Editor button. Press Tab once.
5. Your focus is in the "compose in this mail format" list box. Choose Plain Text by either typing the letter P or by pressing Alt + Down Arrow to open the list, then use the Arrow keys to make your choice.
6. Tab to the OK button and press Enter.

Use this process to choose HTML format for messages you write.

Changing the Format of an E-Mail Message

If you are forwarding or replying to an e-mail message you can change the format of the message. This is not a workaround for messages sent to you in RTF with embedded attachments. It is a way to add formatting such as headings, lists or highlighting to messages you forward or reply to (including messages you reply to all for).

To change the format of an e-mail message you Forward, Reply or Reply All to:

1. Once you choose whether to Forward, Reply or Reply All and the e-mail message is ready for any additional comments, press Alt + P for the Options Ribbon.
 - a. If you have Adobe acrobat installed, you will need to press Alt + P, number 1 as the Acrobat Ribbon also uses the letter P to access it and is now reached by pressing Alt + P, 2.
2. Press the following keyboard commands for the desired message format:
 - a. L for Plain Text format.
 - b. H for HTML format.
 - c. R for Rich Text Format.

You can change the format of a New mail message using this same process. Typically you wouldn't do this because you've set the default e-mail message format.

Sending Attachments

For both HTML and Plain Text options for mail, attachments will be in the Attachment area of the message header. This makes them easier to find when you attach files or when someone sends you attachments.

When you choose RTF or Rich Text Format, attachments appear in the body of the message wherever your cursor is or was at the time the attachment was added. This can make it difficult to locate attachments. There is an article on the implications of your mail message format and [Outlook attachments](#)² on the Karlen Communications web site.im

To send an attachment with your message,

1. Press Alt + the letter N, A, F for the Insert Ribbon, Add File. You can also press Alt + H, F, A. Remember that some tools you use often are on the Home Ribbon.

² Outlook Attachments from the Karlen Communications web site:

<http://www.karlencommunications.com/MicrosoftOfficeAccessibility2010.html>

2. This opens a dialog where you can choose the file or files you want to attach. Locate the file and select it.
3. Tab to the Insert button and press Enter, or press Alt + S to insert the file into the message.

You can send multiple files, however, be aware that there are size restrictions on your e-mail and you may get a message that the message is too large. Break the files up into smaller chunks and send them if you get this message. For really large files you might need to use a secure transfer service such as MagicVortex which is accessible or YouSendIt.

Another method of sending attachments is to go into My Documents, select the file or files you want to send to someone and press the AppKey. This opens a context menu. Choose Send To which has a sub-menu. Choose Send to e-mail recipient. This will open a new mail message and your focus will be in the To: edit field. The subject line will have the names of the files and the body of the message will have information about the files. You can, of course delete this information and replace it before sending.

Saving Attachments

To review attachments you've received, using the JAWS screen reader, press JawsKey + A to move focus to the first attachment when in an open message. You can press Enter on an attachment to open it; however, you may get a warning that the file might contain a virus, especially if it has a .doc, .bat. Or .vb extension.

Save the selected attachment by pressing the AppKey, choosing Save As and then locating the folder you want to save it to. You will most likely not be in the My Documents folder, but rather be in a temporary Internet or Outlook folder. It is easier to put attachments in My Documents instead of remembering where on your hard drive temporary Internet/Outlook files are stored.

In Office 2010 there is a feature called Preview view of a document that has come from either the Internet or through Outlook. When a document is opened in one of the Office applications you can read it but not edit it. There is a yellow info bar at the top of the document between the Ribbons and the document itself.

To make the document editable, press Alt + F, letter I, E for File/Backstage area, Info, Edit document. If you look at the Info tab in the File/File/Backstage area you will see that the only option is to make the document editable. Once you do, all other tools in the Info tab are available to you.

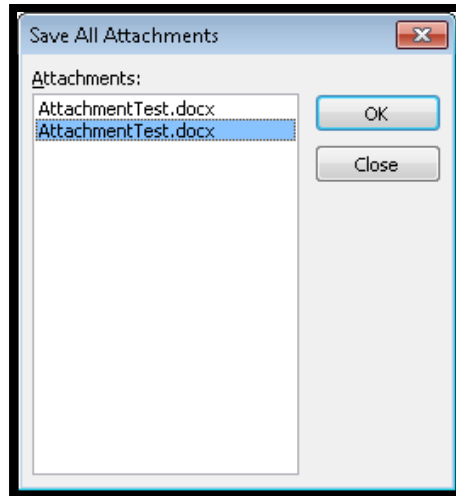


Figure 21 Save Attachments dialog with one file attachment selected.

You can save attachments from received messages by pressing Alt + F for File, then M for Save Attachments.

If there is more than one attachment, all of them are selected. Your focus is on the OK button. If you want to review the attachments and choose which attachments to save, press Shift + Tab to move into the list of attachments. Then use the Up or Down Arrows to review the attachments. For example, you might not want to save a business card or other e-mail related attachments, just the files you need.

Once you've made your choice and moved to and activated the OK button, you can decide on the folder in My Documents or on an external storage device to save the attachments to.

Multiple Mail Accounts

If you have more than one e-mail account, you can easily use the one you want for individual messages. You will have a default e-mail address or account that will be used for every message going out. This might be a home account and you may also have a school account or a business account.

Open a new mail message. Press Alt + M to access the From list and then use the Up or Down Arrow to choose the account you want to send from.

You can then quickly press Alt + Period to move to the To button and your address book or Alt + U to move to the Subject line. Typically I start by filling in the To field because this is where my cursor is when I open a new mail message. I then press Alt + M if I need to change the account and then press Alt + U to move to the Subject line. This seems to save time for me as the workflow is continuous and there isn't a lot of excess keyboarding.

Formatting Messages

Outlook 2010 lets you format the content of an e-mail message while in HTML format. I'm focusing on this format because it is now widely used. In a message you are writing you can add any of the HTML elements including headings, tables, lists, Alt Text for images and objects as well as captions for images and tables.

Headings in E-mail Messages

If you are writing a newsletter e-mail or are sending a long post with topics in it such as a conference announcement, you can use headings in your e-mail. They work the same as in a Word document. If you use JAWS, you can get a list of headings in your document by pressing JawsKey + F6.

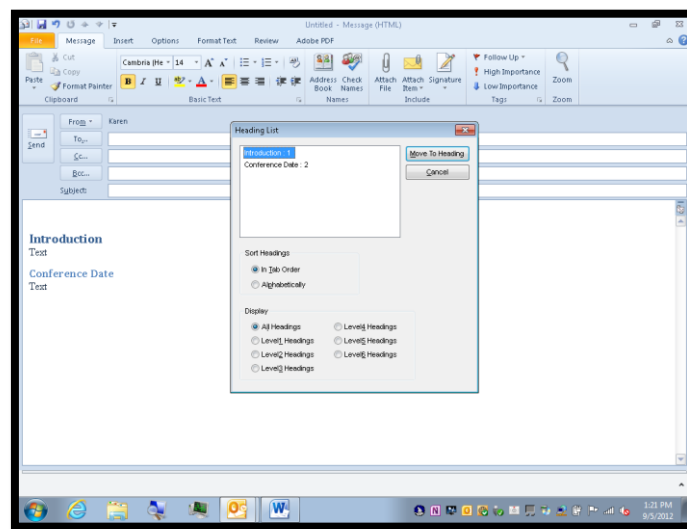


Figure 22 List of headings in an e-mail message from JAWS screen reader.

To add headings to text in an e-mail message:

1. Select the text you want to be a heading. Never select an entire paragraph. Headings are navigational points, paragraphs aren't.
2. To apply a Heading 1 press Ctrl + Alt + number 1.
3. To apply a Heading 2 press Ctrl + Alt + 2.
4. To apply a heading 3 press Ctrl + Alt + 3.

Alt Text on Images

You can add images and objects to an HTML message by pressing Alt + N, P for Insert Ribbon, Picture. Once you locate and insert your picture you can add Alt Text to it in the same way you can with a Word document.

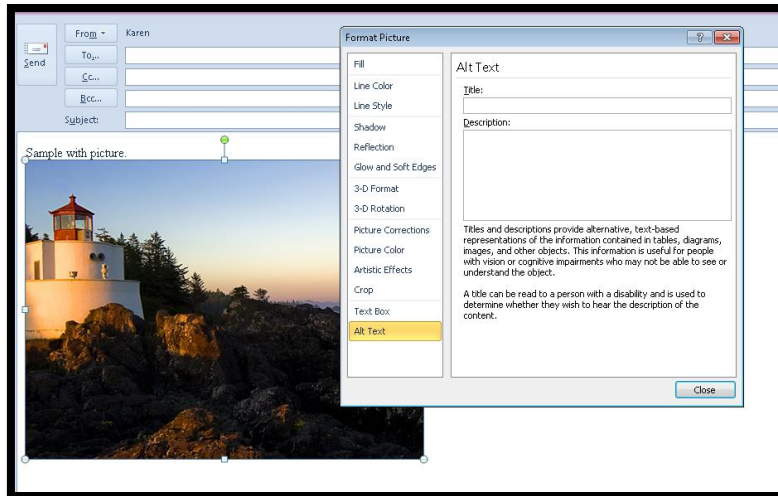


Figure 23 Image in an e-mail message with Alt Text dialog shown.

To add Alt Text to images or objects in an HTML e-mail message:

1. Select the image or object.
2. Press the AppKey or Right Click on the image or object.
3. Choose Format Picture. It is at the bottom of the context menu so pressing the Up Arrow Once will take you to it.
4. Once the Format Picture dialog opens, press the Tab key to move into the list of categories.
5. Press the End key because Alt Text is at the bottom of the list of categories. You can also use first character navigation and press the letter A.
6. Press Tab once which will put you in the Title edit area. You can add a title for the image or object.
7. Press Tab to move to the Description edit area and type the description or Alt Text for the image or object.
8. Tab to and activate the Close button.

While in the Alt Text edit area you can select copy and then paste the same text for a caption using the keyboard. If you are using a mouse, position the pointer in the text, right click and choose Select All, then right click and choose copy.

Note: If you are using the JAWS screen reader, you can press Ctrl + Shift + letter O to get a list of objects in an e-mail message. This includes images with Alt Text. Select one and press Enter on it to go to that image and select it.

Captions on Images in E-mail

If you've copied the information from the Alt text area and want to use it for a caption, here is how to do that.

Although the information may be redundant for those using screen readers, adding a caption for those with other disabilities who may not be able to decode the image is helpful. Those of us who do use screen readers can quickly jump over any repeated text. There is also a bug with JAWS where it will only say "slash" when it comes to images and objects even though they do have Alt Text. Adding a caption provides optimal accessibility.

1. Select the image or object.
2. Press the AppKey or right mouse click.
3. Press N for Insert Caption or click on Insert Caption.
4. When the Insert Caption dialog opens your cursor is just after the text "Figure X."
5. I typically press the Spacebar to give a space between the figure number and the text for the caption.
6. Type the caption or paste it from the text you copied from the Alt text dialog.
7. Press Tab to confirm that the Caption will be placed below the image.
8. You don't need to confirm anything else.
9. Tab to and activate the OK button.
10. Your caption is placed below the image.

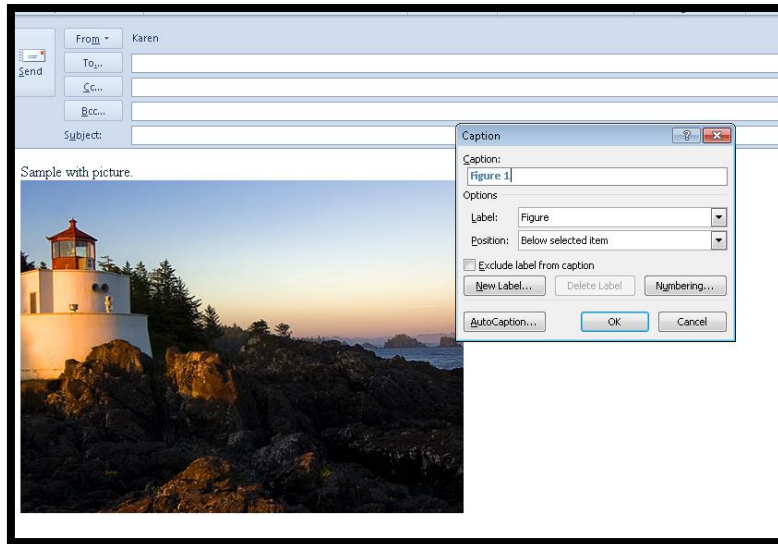


Figure 24 Image in an e-mail message with Caption dialog showing.

Tables in E-mail Messages

Although many organizations use tables to format content, this creates barriers to information especially in an e-mail message. Tables should never be used for design layout!

To insert a data table into an e-mail message:

1. Place your cursor where you want the data table.
2. Press Alt + N, T for Insert Ribbon, Table.
3. Use either the Table Gallery or the Insert Table tool. Never draw a table!

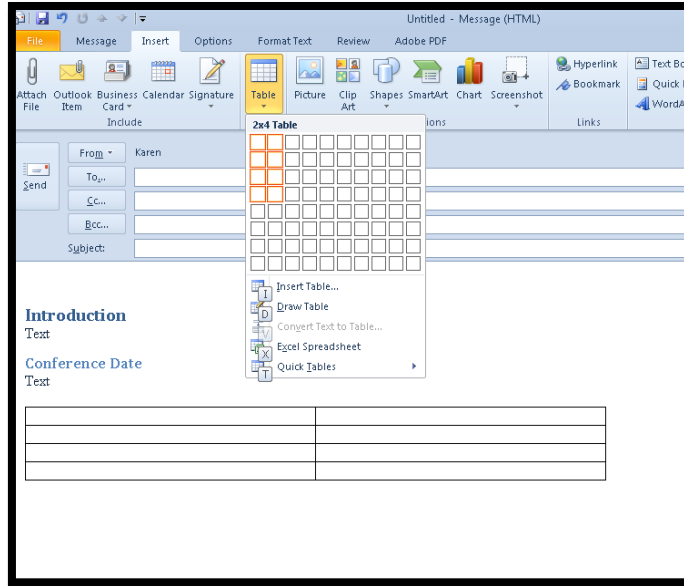


Figure 25 Inserting a table into an HTML e-mail message.

Once the table is inserted, the Table Tools Sub-Ribbons will appear. The following image shows the Table Tools Sub-Ribbons and the Table Properties dialog.

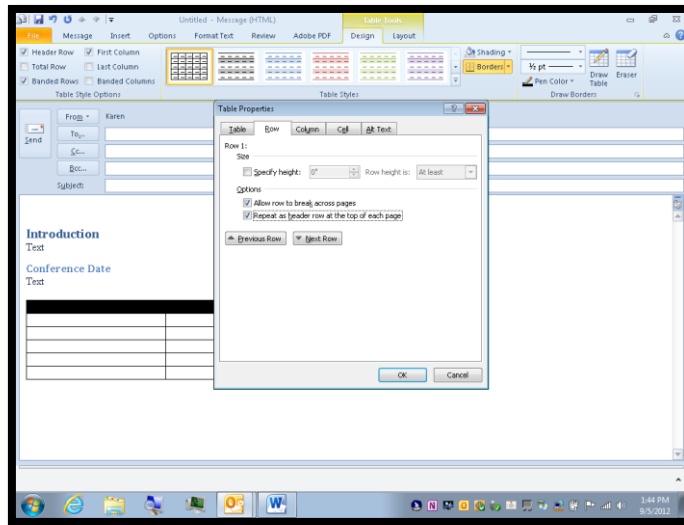


Figure 26 Table Tools Sub-Ribbons and Table Properties dialog.

Although you have some of the same tools for tables as you do in Word, most adaptive technology will not be as robust in the information you can get from a table in an e-mail message.

It is hoped that as we move forward with more capabilities in e-mail messages for more robust formatting that adaptive technology will be able to provide as much information as we have in word processed documents and other document formats.

Lists in E-mail Messages

As with Word documents, use the Bullets or Numbering tools from the Home Ribbon when creating an HTML message.

Select the text first and then press either Alt + H, U for Bullets or Alt + H, N for Numbering.

Do not add space between bulleted or numbered items by using the Enter key. This breaks the list. Unlike using a word processor, there is no easy way to add space between bulleted or numbered list items in e-mail messages.

Message Options

When you send a message, the default priority is “Normal” which implies that the recipient can read it at their leisure, there is no hurry. You can set options for each message you send.

To give a message high importance, press Alt + H, H while in the message which activates the Home Ribbon, High Importance button.

The other message option you’ll use most often is to request a read receipt which is checked by pressing Alt + P, Q.

Here are some other message options you can set using the Ribbons:

Press Alt +P, S to Save Sent Item to which lets you save a copy of a message once it is sent to a specific mail folder. This is handy if you need to keep track of messages you send to a specific person and don’t want to sort through your Sent Items folder.

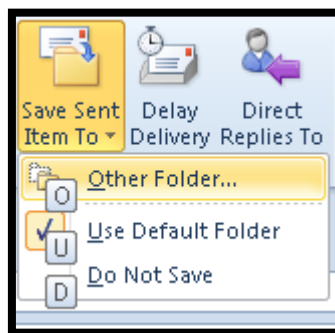


Figure 27 Save Sent Item To options.

The options under Save Sent Item To are:

- Letter O for Other Folder.
- U for Use Default Folder.
- D for Don't Save which will not put a copy in the Sent Items folder either.

Press Alt + P, D to Delay the Delivery of a message. This opens the traditional Message Options dialog but puts your focus on the time for delivery of the message. You can press Shift + Tab to change the day for delivering a message. For example if you are working on the weekend and don't want people to know this so they can expect this on a regular basis, you can delay the sending of the message until Monday. If you choose this option, each time you exit Outlook until the delivery date and time Outlook will notify you that There are messages that haven't been sent yet. Choose to Exit Outlook anyway when you have messages queued to send at a later time.

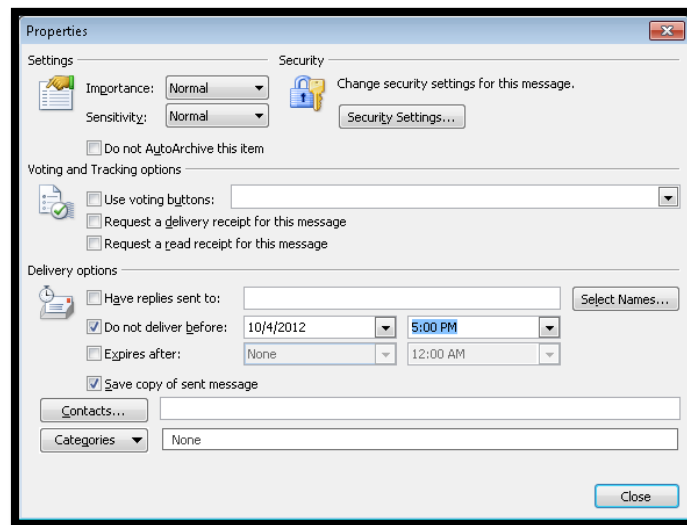


Figure 28 Delay Delivery time field selected once Ribbon command is pressed.

Press Alt + P, letter I to Have Replies Sent To which opens the traditional Message Options dialog and puts your focus in the area where the default e-mail account is entered. There is a Select Names button to the right of the area in focus. When the Select names button is activated your Address Book is open and you can choose someone else to have replies sent to.

By default replies to your messages will be sent to the account you send them through. For example, if I send a mail message through the Karlen Communications Info account, replies will be sent back through that account. This tool is used when you want a different contact person to receive the replies and can be used if you will be out of the office or if you are handing responsibility to another person.

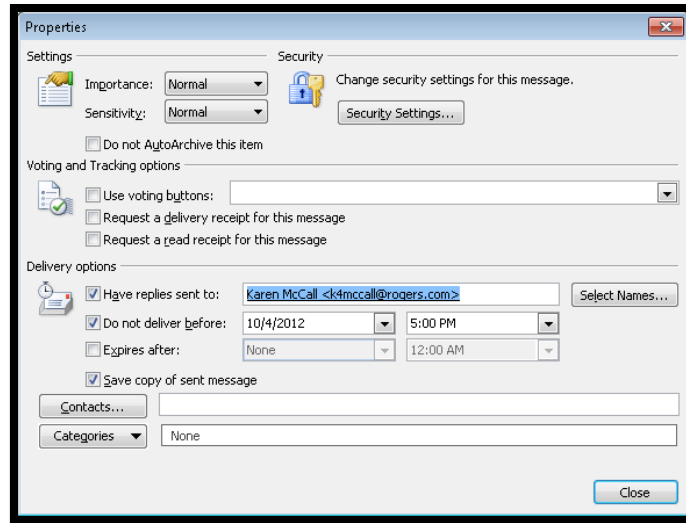


Figure 29 Send Replies To area of the Message Options dialog.

Pressing Alt + P, B will show or hide the BCC field. It is a toggle. If visible, the BCC field will appear just under the CC field in the message header.

Options Ribbon Summary

The following keyboard commands are for the tools on the message Options Ribbon.

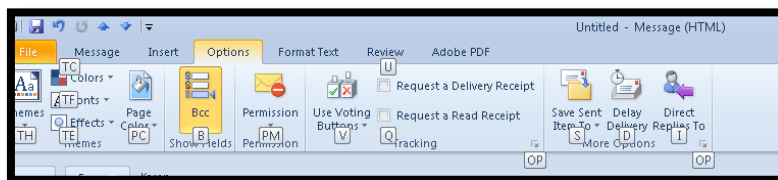


Figure 30 Options Ribbon showing keyboard commands.

Press the following to perform the task:

- Press Alt + P, T, H for a Theme for the message.
- Press Alt + P, T, F for a different Font Theme for the message.
- Press Alt + P, F, C for a different colour Theme for the message.
- Press Alt + P, T, E for a different set of theme Effects.
- Press Alt + P, P, C for Page Colour.
- Press Alt + P, B to show or hide the BCC field.

- Press Alt + P, P, M to choose Permissions for the message.
- Press Alt + P, V to choose Voting buttons.
- Press Alt + P, U to Request a Delivery Receipt.
- Press Alt + P, Q to Request a Read Receipt.
- Press Alt + P, S to Save Sent Items to a specific folder.
- Press Alt + P, D to Delay Delivery to a later time or day.
- Press Alt + P, Letter I to Direct Replies to someone else or another account

Message Options Dialog

There might be times when you want to use the full Message Options dialog. You can still use this tool. If you want to use the Message Options dialog, press Alt + Alt + P, letter O, P.

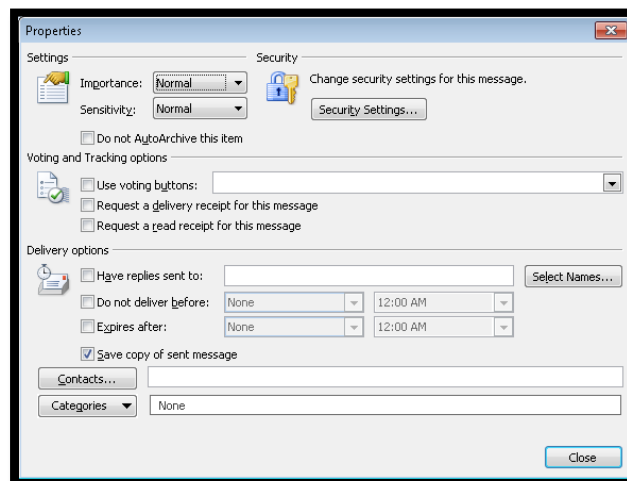


Figure 31 Message Options dialog.

The first setting is the message importance [Alt + P] and your focus is in the combo box, the default is Normal. Use the Up or Down Arrows to choose Low or High priority.

Press Alt + Y to set the sensitivity of the message. Normal is the default and your other choices are personal, private or confidential.

For example, if you have a confidential message and set the sensitivity as confidential, when the message is opened by the person you are sending it to, JAWS will read the header information “Please treat this as confidential.” This text is coloured and is visible in the header before the sender’s name.

Press Alt + T to set Security settings. This is a button that opens another dialog which contains items such as encryption and digital signature capabilities. Remember that the recipient needs to be able to decode security settings, so use them sparingly, if necessary at all.

You can also set Permission from the Options Ribbon by pressing Alt + P, P, M which opens a sub-menu with the same options as in the Message Options dialog.

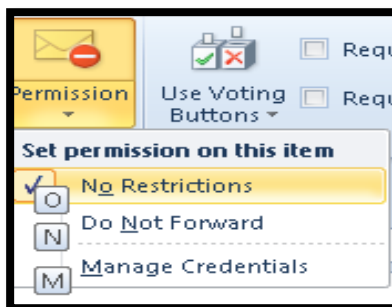


Figure 32 Permissions sub-menu from Options Ribbon.

Press Alt + U to use voting buttons. This lets you send messages for recipients to vote on Note that only recipients with Outlook can vote. If you have recipients with other e-mail clients, you will need to let them manually cast a vote by telling them this is the purpose of your message.

This tool can be accessed from the Options Ribbon by pressing alt + P, V.

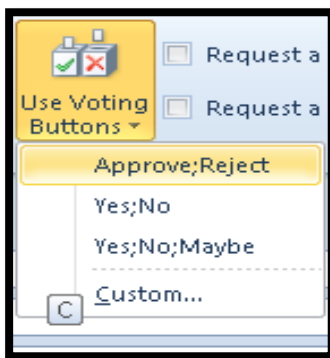


Figure 33 Voting options sub-menu from the Options Ribbon.

In the Message Options dialog, if you are including a voting function with your message, you need to press the Tab key once the voting check box is checked. This moves you to a list of possible voting responses. You can choose from Accept/Reject, Yes/No, or Yes/No/Maybe. Once you've pressed Enter on the Close button in the options dialog, a band of colour will appear at the top of the message header, just above the To edit area. It will confirm that a voting function has been added to your message. When you send the message, the recipient will see a dark band of colour just above the header information telling them to vote by clicking one of the options above. This can be accessed using a screen reader by

pressing Alt to take focus to the Menu bar, then Ctrl + Tab to move through the Toolbars until you hear “yes button.” You can now use the Arrow keys to review the choices and press Enter on the one you want. Remember that these are Windows based keystrokes and not specific to a screen reader.

Once the recipient has made a choice, they will get a dialog with two radio buttons. The first radio button asks if they want to send their vote as is, and this is the radio button that has focus/is the default. The second radio button asks if they want to send their vote with a reply. If they choose to add a reply, a new mail message is opened and focus is in the edit area where they can begin typing a reply. Once the recipient has made their choice, and presses OK, the vote is sent.

Votes are returned with the vote displayed in a band of colour just above the header information on a message. Note that JAWS will read the information. It is the first piece of information read in an opened message and might be over shadowed by other activity. You can read it by pressing Ctrl + JawsKey + W to virtualize the open message and display all screen content. The information on voting will appear several lines down in the text.

If you are a screen reader user and are sending out a voting question, any responses that are returned will have the vote inserted in the subject line. For example, I sent myself a message called “voting test” and when I responded yes, the subject line in the reply was “Yes: voting test” which let me tabulate the votes.

When I put focus on the original message that came in, the band of colour now read: “You voted Yes, July 27, 2012.” JAWS read this as the first line in the message header.

Out of the voting functions and back to the Message Options dialog, pressing Alt + D will request a delivery receipt. This is different from a read receipt and only indicates that the recipient’s server has received the message.

Press Alt + R to request a Read Receipt. This means that the message was opened, and the recipient can choose not to send you a return receipt. You would want to use this if you have time sensitive information in an e-mail or are documenting correspondence.

Pressing Alt + A will check the check box to have any replies to your message forwarded to another person or another e-mail address. For example, if you are going to be away from your computer for vacation, but are expecting a reply to something important, you can have replies to specific messages sent to a Yahoo or Hotmail account. If someone else is going to handle the issue while you are gone, you can have the response to that one message sent to whoever is covering that issue. Once this checkbox is checked, you will need to press Tab to move to the edit box where you can enter the alternate e-mail address. You can also press Alt + L to access your list of Contacts to choose another person.

By default the “Save sent message” check box is checked. The default folder is Sent Items. This keeps a record of your correspondence for future reference. Press Alt + N to uncheck this check box. Press Alt + W to Browse possible folders to archive the message.

Pressing Alt + B will let you choose when to send a message. If you compose a message in the morning but want it sent out later in the day, or two days from now, you can do this.

Once this check box is checked, press Tab to choose the date for delivery and Tab again to choose the time for delivery. Of course this assumes that your computer will be on and connected at that time. If it isn't, your message won't go out until you turn your computer on again and send it.

Pressing Alt + X will check the Expires After check box which will let your timed delivery expire after a specific time. Again, you will need to press the Tab key to choose a date and Tab again to choose a time once this check box is checked.

Pressing Alt + C will let you choose a Contact to send this message to. You might use this when setting up an appointment for a meeting. It is similar to the CC field.

Pressing Alt + G lets you choose a Category for your message. There are pre-determined categories in Outlook, or you can add your own. We will be working with Categories in the Calendar section.

Once you've finished exploring and setting options for this message, you can Tab to and press Enter on the Close button.

Creating Folders

Mail is just streaming in and now you need to put it somewhere. You can create folders and sub folders to store messages you'll be referring to or want to keep for a period of time.

Using folders to archive course communications or communications specific to a project is handy. You can then archive them as a tagged PDF document, if you have Adobe Acrobat, to refer to later which gets them out of your mail client and helps organize material better.

First, create the folders in your Inbox:

1. With your focus on the Inbox folder in the Navigation Pane, press the AppKey or right mouse click.
2. Press the letter N for New Folder. This opens a dialog and your focus is in the Name edit box.
3. Type in the name of the new folder.
4. Pressing Tab or Alt + F will take you to the "folder contains" list box. By default, this folder will contain mail and post items. Other options are contacts, tasks or journal items.

5. Pressing Tab again, or Alt + S will take you to where you select where to place the new folder. By default, the focus is on the Inbox. Since this is where we want to place the new folder, we can now Tab to the OK button and press Enter.

If you've already created folders in the Inbox, your screen reader may tell you that the Inbox is closed. Press the Right Arrow to open the list of existing folders, find the one you want to create a sub-folder for and then Tab to the OK button and press Enter.

Moving Messages

Now you can move messages from the list of inbox messages into their proper folders.

1. With your focus on the message or messages you want to put into a folder, press Ctrl + Shift + V. This opens a dialog with a list of the folders in Outlook
2. Use the Up or Down Arrows to choose the folder you want. Remember that if you hear that a folder is closed, you can press the Right Arrow key to view sub-folders.
 - a. You can use first character navigation to locate a folder. For example I have one folder called Karlen and one called Karlen Info and can press the letter K to move to each of them.
3. Press the Enter Key and the message or messages are moved into that folder

There are some other options in this dialog and you can even create a folder from here if you realize you haven't created it yet.

Flagging Messages

When messages come into your Inbox, you can flag them for further action. For example if you need to call someone, follow-up on a task or message, review a message or forward it to someone else, you can flag it for one of these actions.

To quickly flag an item for future action:

1. Put your focus on the message in the list of messages.
2. Press Alt + H, U to open the Flag Gallery.
3. Your choices for flagging a message are:
 - a. T for Today.
 - b. Letter O for Tomorrow.
 - c. W for This Week.

- d. N for Next Week.
- e. A for No Date.
- f. C for Custom.
- g. R for Add Reminder.
- h. M for Mark Complete.
- i. E for Clear Flag if the message is already flagged.
- j. S for Set Quick Click.

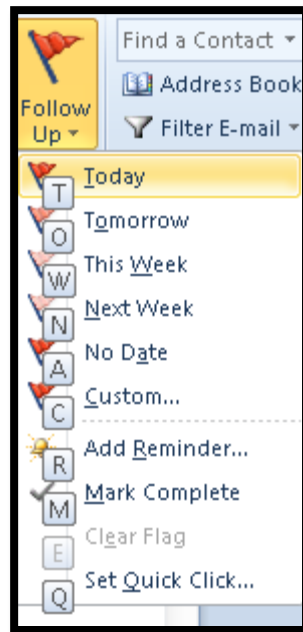


Figure 34 Flag options from the Home Ribbon.

Pressing the Insert key on the six pack will flag a message. Pressing Insert again on the same message, will clear the flag.

By default, JAWS uses both the JawsKey on the NumPad and the Insert/JawsKey on the six pack interchangeably. To let you effectively use the Insert key on the six pack for flagging messages and other functionality, you can turn this extended keyboard support off.

To do this, press JawsKey + J for the JAWS menus. Choose Utilities > Configuration Manager > User Set Options > Keyboard Options. Since the support for the Insert on the six pack is on by default, pressing Alt + E will uncheck this option. Now you can use the Insert key on the six pack to insert a red flag on messages.

If you don't want to adjust the user options, you'll need to use the JAWS PassKey [JawsKey + Number Row 3] to use the single keystroke flagging feature each time you want to flag a message.

You could press JawsKey + F2 while in Outlook to open the Utilities dialog, choose Configuration Manager and adjust this setting for Outlook only.

Remember to check that the reading of flagged messages is turned on in your JAWS verbosity settings for Outlook.

Once a message is flagged, a copy of it is put in the For Follow-up folder in the Navigation Pane. This may be a standalone folder, or it could be nested under the Search Folders in the navigation Pane. Your copy still exists in the Inbox, but you now have a list of messages you've flagged. You can move the original message from the Inbox and it will still be visible in the For Follow-up folder. If you delete the message, or complete the task/follow-up, it will be removed from the For Follow-up folder. A message with any colour flag will be put in the For Follow-up folder.

If you show the To Do Bar, flagged messages will be visible there as well.

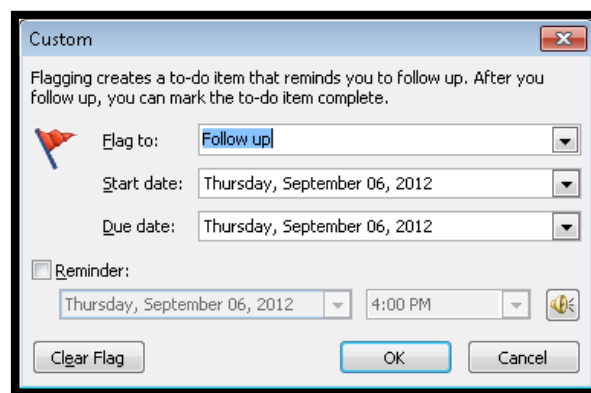


Figure 35 Customize Flag dialog.

If you want to Customize a flag:

1. Press Alt + H, U, C which opens the Customize Flag dialog.
2. By default, your focus is in the flag for list box. Some of the choices are to flag for call, forward, reply, review, or no response necessary. Use the Up and Down Arrows to make your selection.
3. Press Tab to move to the Start Date list box and make a choice.
4. Press Tab again to move to the Due Date list box and make a choice.
5. Pressing Tab again will move you to the Reminder check box and if you check this, you can then move to the reminder sound and set a different one if you like.

6. Pressing Tab again will move you to the Clear Flag button.
7. To confirm the flag, Tab to the Ok button and press Enter.

The flag will appear in the column to the far right of the message.

Quick Click Flags can be set by right clicking in the Flag column next to the message information. For those using the keyboard instead of a mouse, it is easier to use keyboard commands to do this rather than trying to locate the column and using the right mouse button equivalent.

To set a Quick Click Flag:

1. Select a message in the list of messages.
2. Press Alt + H, U, S to open the Set as Quick Click dialog. This lets you right click in the Flag column and quickly add a predetermined flag.
3. Make your choice.
4. Tab to and activate the OK button.



Figure 36 Set as Quick Click dialog.

Now when you right click in the Flag column for a message, this flag will be added.

Note: As you practice adding and removing flags to messages, your options might be limited once a flag is removed from a message as this indicates the task was complete.

Creating Rules and Alerts

You can create rules for incoming messages. For example, if you want messages from a list or a discussion group to be put into one folder, you can set this up. This lets you filter messages and streamline Inbox content. There is already a tool in Outlook to filter Junk mail into a “Junk” folder. This is based on criteria common to junk mail or spam. Information on Junk mail follows this section.

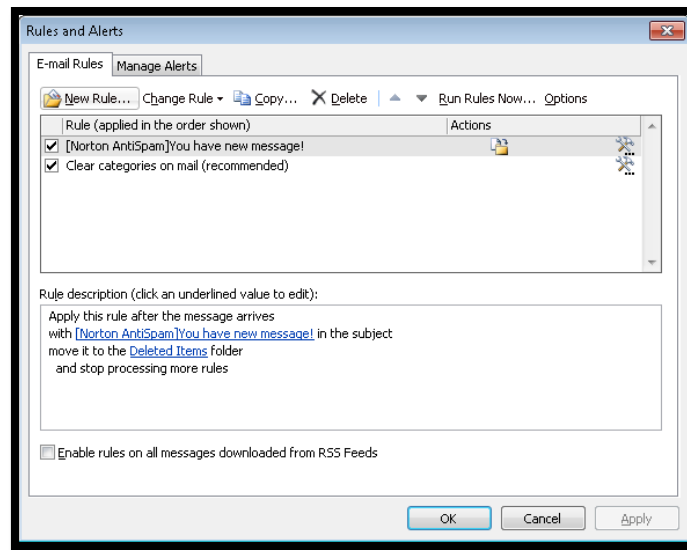


Figure 37 Rules and Alerts dialog.

To create a rule or filter:

1. Press Alt + F, letter I, R for File/Backstage area, Info tab, rules and Alerts. This opens a dialog that will show any existing rules and let you modify them, or create a new rule.
2. By default, your focus is on the New rule button. Press Enter to launch the wizard to guide you through the process.
3. This moves you to Step 1, select a template which is a list box. Use your up and down arrows to explore the options. For this exercise, you are going to use “Move messages from someone to a folder.” Make sure this option is selected/has focus.
4. Press the Tab key to move to step 2, Edit the rule description. There are two links to dialogs here, one to identify the “someone” as a person or a list; and the other to identify the folder where you want the messages to go into. Your focus should be on “people or distribution list.”
5. Press Enter. This opens another dialog which looks like the list of Contacts dialog. Here you can either type a name or choose from your list of Contacts. Since we don’t have any contacts yet, type in your own e-mail address, Press the Enter key which will put this

address in the From edit box. This identifies that mail from you will go into a specific folder.

6. Press Tab to the OK button and press Enter.
7. You are returned to the rules wizard. Press the Down Arrow to move you to the “specified” link and press Enter.
8. By default, your focus is on the Inbox and if you’ve created folders, your screen reader should tell you that the Inbox is closed. Use the Right Arrow to expand the Inbox and then use the Down Arrow to find the folder you want to use.
9. If you haven’t created a folder yet, press Alt + N for New Folder. This opens a small dialog with an edit field into which you can type the name of the folder. Type your first name and press Enter. You should be returned to the rules and alerts dialog and your focus should be on the new folder.
10. Press the Tab key until you get to the OK button and then press Enter.
11. You are returned to the rules and alerts wizard. Press Alt + N for Next to move on to the next set of options in the wizard.
12. We are back to step one which lets us select conditions for incoming messages from you. By default, the “on this machine only” and the “from people or distribution list” are checked. If you are working on a network or have remote access to your information, you can synchronize your rules and alerts. We are not going to convert these options in this tutorial.
 - a. Explore the other conditions you can set. For example, you can choose items sent through a specific account, sent only to you, or with specific words. Leave the defaults and press the Tab key.
13. Step 2 in this case lets us modify the rule we’ve already set. We don’t want to do this, so press Alt + N for Next.
14. Now we determine what we want to do with the message. Again, we are at step 1. By default, because of our previous choice, we have the “move it to the specified folder” checked. We could also “permanently delete it,” “move a copy of it to the specified folder,” or “flag the message for action in a number of days.” Leave the default and press alt + N for Next. There is a step 2 here but it is the same as before, letting you modify the rule you set in the first page of the wizard.
15. In this next page, you can select any exceptions to the rule. By default, there is nothing checked. Some of your options are “except if the subject contains,” “except through the specified account,” or “except if it is marked as important.”

16. Press Alt + N for Next.
17. We are now in the finish rule set-up. Step 1 is to create a name for the rule if you don't like the existing one.
18. Press the Tab key to move focus to the "Run this rule now on messages already in the Inbox." By default this is un-checked.
19. Tab to move focus to the "Turn on this rule" check box which is checked by default.
20. Press Tab to move to the Finish button and press Enter. Notice that you can still edit the description of the rule if you like, or you can go back into the settings and make modifications.

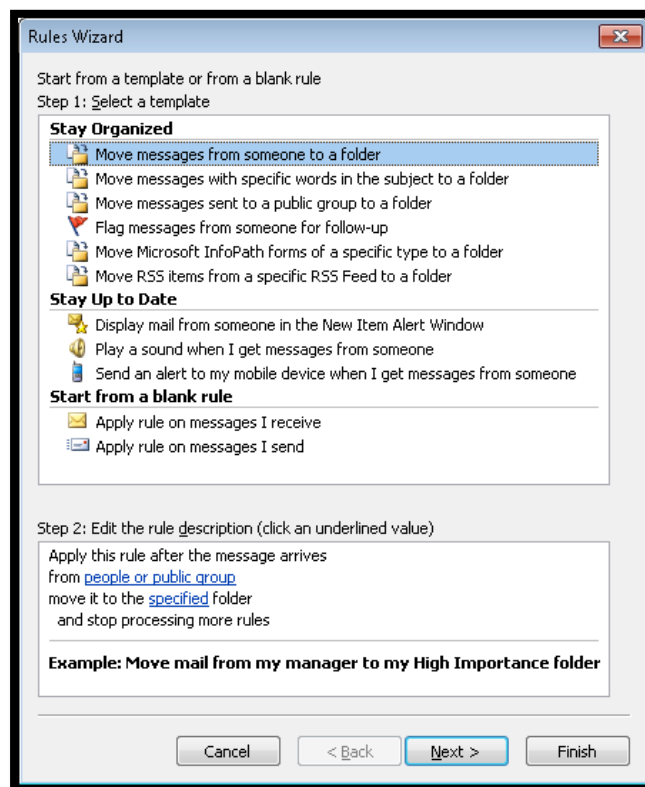


Figure 38 Step 1 in creating a rule or alert.

In the Rules and Alerts wizard, if a rule is selected you can also change the rule, delete the rule, copy the rule, or run the rules now. You don't have to create rules for Junk mail. Outlook 2003 has pre-determined filters that look at incoming mail for elements that are consistent with spam or junk mail.

Junk Mail

Outlook has filtering capabilities that will sort what it pre-determines as junk mail into a Junk mail folder. In previous versions of e-mail clients, you had to create rules or filters for every single message that was junk or was offensive. Since no spammer uses the same e-mail address twice, or three times, you were constantly creating rules or filters that couldn't keep up with the amount of junk coming in.

I was going to delete that last paragraph, but as Junk filters get better at determining spam, spammers get better at getting around the filters to send you that all important spam. I find I still have to block certain words or phrases to avoid horrid spam.

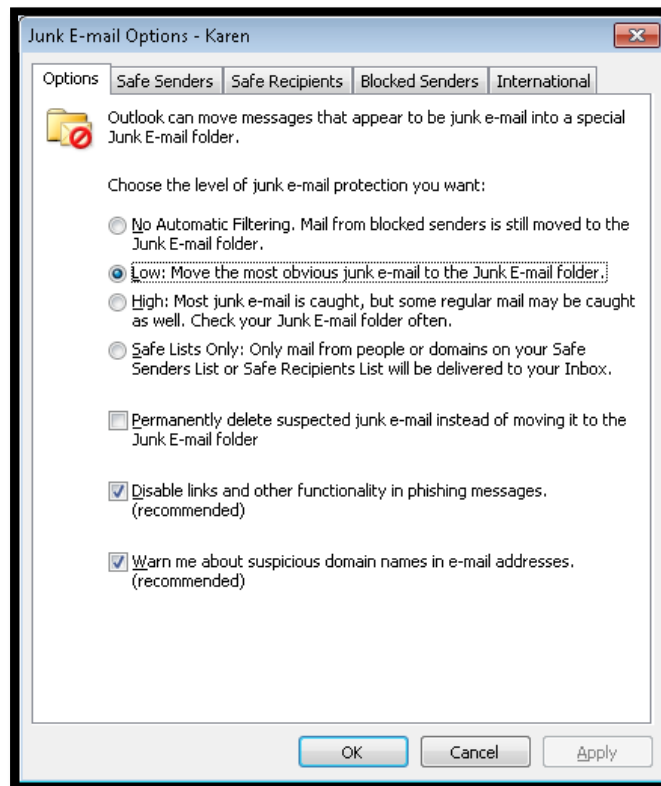


Figure 39 Junk Mail Options dialog.

To modify the criteria for what is junk for incoming messages:

1. With a message selected, press the AppKey or right click on it.
2. Press J then letter O to open the Junk E-mail Options dialog.
3. By default, your focus is on the radio button for low [move the most obvious junk e-mail to the junk e-mail folder]. The other options are:
 - a. No automatic filters [Alt + N].

- b. High – Most junk e-mail is caught [Alt + H].
 - c. Safe lists only – only people from people or domain names on your safe list will be delivered to you [Alt + S].
4. Pressing Alt + P will permanently delete junk e-mail instead of moving it to the junk folder.
 5. Press Alt + A to Apply any changes in settings, and then press The Tab key to the OK button and press Enter.

There are tabs in this dialog for Safe Senders, safe Recipients and Blocked Senders. If you are using a screen reader, it is easier to add items to these categories from the context menu for a message. Start by pressing the AppKey or right click and explore the options.

If you are looking in the Junk folder to check on its accuracy and to view what kinds of junk mail you get, and find a message that shouldn't be there, you can press Ctrl + Alt + J to mark a message as not junk.

While in your list of mail messages, if you press the AppKey to open the context menu and then J to move to the Junk sub-menu you can block messages from the sender or domain. You can also unblock messages if you find that a message from someone has been mistakenly put into your Junk Folder using this method.

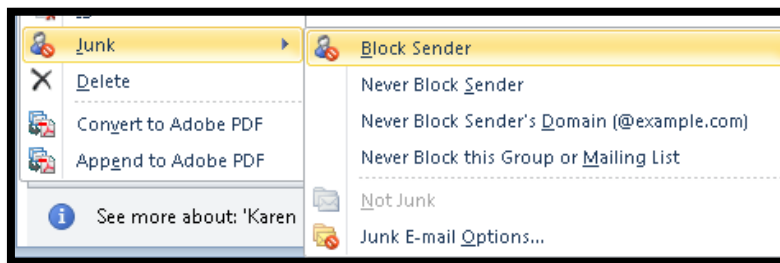


Figure 40 Junk sub-menu from context menu of message.

This is a good time to remind you to keep your virus checker up to date. If you are online in any way, you are vulnerable to virus attacks on your computer. Even if you aren't using the Internet, but are sharing disks with other computer users, you aren't safe from viruses and need a good virus checker like Norton Antivirus® on your system and you need to keep it updated every week.

Stationary - Plain Text, Rich Text or HTML?

There are formatting elements you should take into consideration when sending messages. Although it is nice to have coloured text or images as backgrounds in an e-mail message, they take longer to load and read. Plain text is still the fastest and most accessible format for sending messages.

To have your messages composed using a particular format such as RTF or Rich Text Format or HTML, do the following:

1. Press Alt + F, T for File/Backstage area, Options.
2. Press M for Mail. By default you will be on the General category.
3. Once you are on the \Mail category, press Tab to move into the Mail options.
4. The first item is the Editor Options button. .
5. Press Alt + C to put focus in the “compose in this message format” list box. The options are HTML, Rich Text Format or Plain Text.
6. When you’ve finished with these settings, Tab to and activate the OK button.

RTF or Rich Text Format has serious limitations for those of us using adaptive technology. The most serious consideration is that attachments are embedded in the body of the e-mail message. Unlike Outlook 2003, there is no setting to always show attachments in the Attachment field. Some adaptive technology does have keyboard commands to list objects in the body of an e-mail message, but you have to know that they are there. This information is not given when you read an e-mail message in most cases and objects can include images as well as embedded files.

Stationary

One huge caveat to using stationary is that not everyone will be able to read the messages if you don’t use appropriate contrast. The other is, of course, it will take longer for people to read your messages and it can get quite messy if there’s a lot of replying and forwarding with colour changes. Remember the Kiss principle – keep it simple.

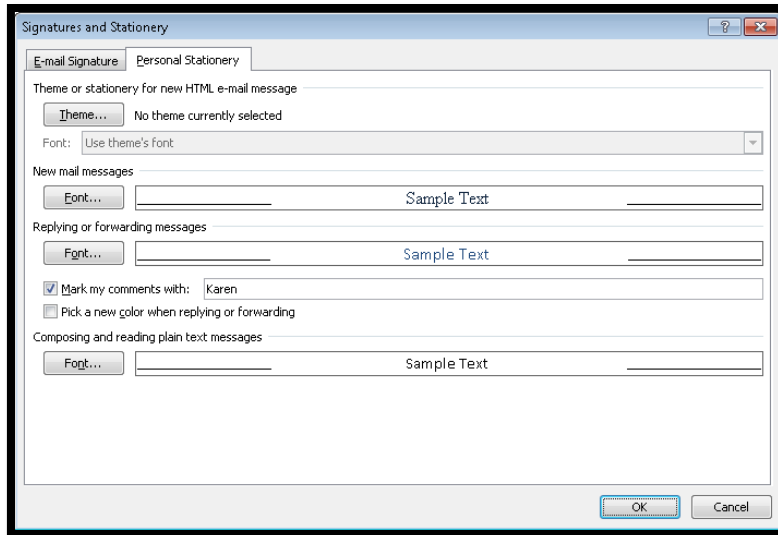


Figure 41 Stationery and fonts dialog.

Still not convinced? To choose stationery:

1. Press Alt + F, T for File/Backstage area, Options. This opens the Outlook Options dialog.
2. Go to the mail category by pressing the letter M.
3. Press Tab to move into the Mail options and then press Alt + F to move to the Stationery and Fonts button.
4. Press Enter on the Stationery and Fonts button.
 - a. This opens the Stationery and fonts dialog.
5. Your focus will be on the OK button.
6. Press Tab 3 times to get to the Theme button. This is another way to use a Theme for your messages.

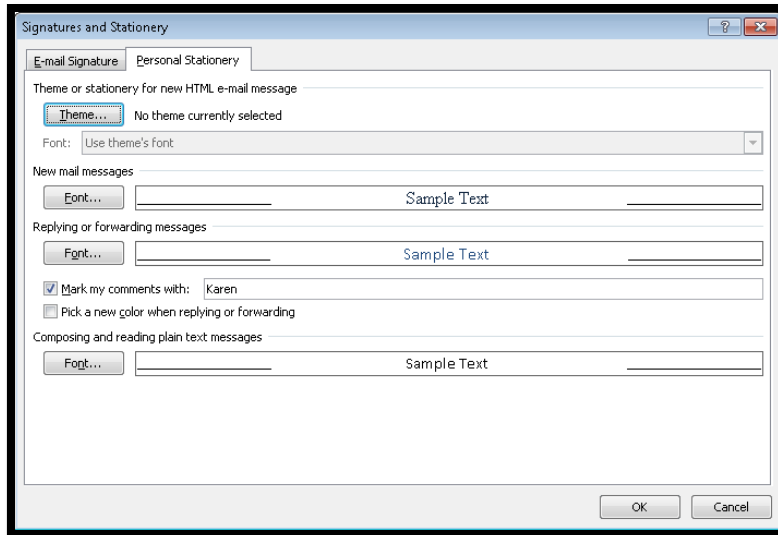


Figure 42 Stationery and Fonts dialog.

If you press Enter on the Theme button another dialog opens with Themes and stationary.

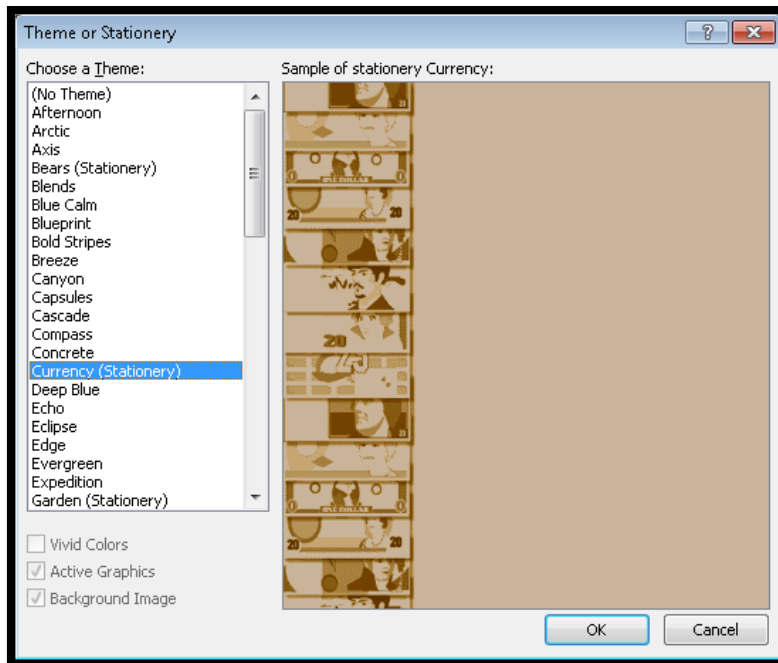


Figure 43 Themes dialog showing Currency Theme.

The preceding image shows the Currency Theme/Stationery which points out the fact that some stationary while cute can cause readability problems for anyone. In the Currency stationary the left margin is taken by images of currency which extend into the writing area of the message. Any text you type will overlap the images making the text unreadable.

Once you have chosen a Theme or Stationary, Tab to and activate the OK button.

The next item in the Stationary and Fonts dialog is Fonts. You can press Tab to get to it or press Alt + F to move to the Fonts button and open the Fonts dialog. This is the font you'll use for new mail messages.

Notice that I choose to use a blue font that reminds me of ink for e-mail messages.

Once you make changes to the font used for new messages, Tab to and activate the OK button.

You are returned to the Stationary and fonts dialog.

The next font you can modify is the font for replying to messages. The keyboard command to open that dialog is Alt + letter O.

It is the same dialog as the Fonts dialog. Make any changes then Tab to and activate the OK button.

You are returned to the Stationary and fonts dialog.

The next item you can change is the "Mark my comments with" check box which can be checked or unchecked by pressing Alt + M while in the Stationary and Fonts dialog. You can Tab to it if you want to use the Spacebar to check or uncheck it.

Once you check this you will have access to the edit box immediately after it that you can type in what you want your comments prefaced with. For example, I preface any comments in replied to messages with my name, Karen.

Pressing /Alt + C will "Pick a new colour when replying to or forwarding messages." My advice is not to check this check box. This will randomly choose colours as you reply or forward messages which can result in unreadable messages. For example you might end up with a pale colour on a white background or a dark colour on a dark background or lime green on a lemon yellow background. Again, while a cute idea, this can create accessibility barriers. This check box is not checked by default.

The last item in this dialog is the font to be used for plain text messages. Press Alt + N to open this Font dialog and make your choices. You are returned to the Stationary and Fonts dialog once you make choices for the plain text fonts.

There is no stationary for plain text. You will be sending messages in either RTF or HTML format if you are using stationary. It is recommended that you use HTML as the format for e-mail messages to optimize accessibility.

When you are finished making changes to the Stationary and Fonts, Tab to and activate the OK button to return to the Mail options dialog.

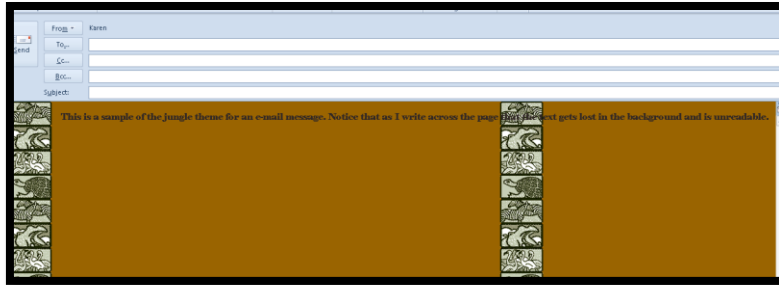


Figure 44 Jungle Theme chosen as default stationary.

I haven't found a way to associate a Theme with an e-mail account so whatever Theme or stationary you choose will be used for all mail sent out, even your business mail if you have a business account set up.

The other tab in the Stationary and Fonts dialog is for Signatures. Note that JAWS 13 is not reading the tab titles for the Stationary and Fonts dialog.

Creating Signatures and Business Cards

When it comes to an electronic signature, you can use either a signature at the bottom of each message, or attach a business card, or use both. You can have several signatures and business cards and choose from among them when you send messages, or you can have defaults.

You will need to create a Contact for yourself before creating a business card or "vCard" and will do that in the Contacts section of this document.

To create signatures:

1. Press Alt + F, T for File/Backstage area, Options.
2. Once the Outlook Options dialog opens, press M to move to the Mail category then press Tab to move into the Mail options.
3. Press Alt + N to move to the Signatures button.
4. Press Enter to open the Signatures dialog.

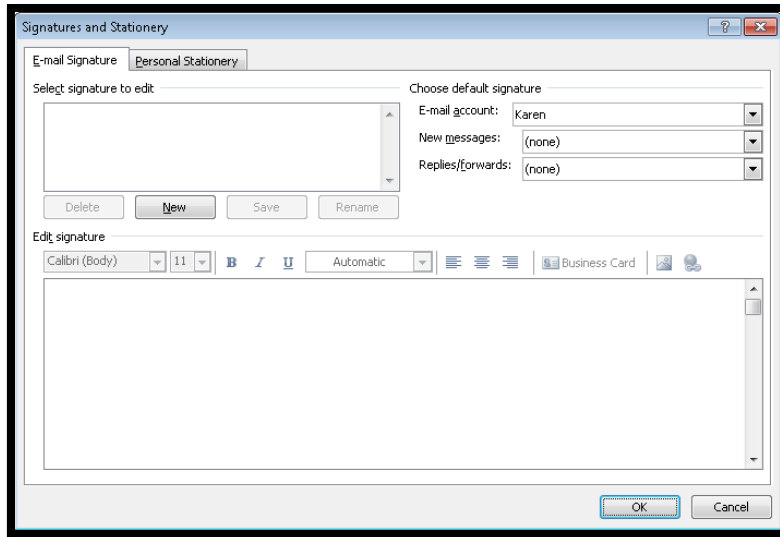


Figure 45 Signature dialog.

When the Signature dialog opens, your focus is on the OK button. Press Alt + N to move to the New Signature button if you don't have a signature yet. If you do, you can press Tab three times to move to the list of available signatures. This will give you the opportunity to edit any of them.

If you press Alt + n for a New signature, a small dialog opens where you can give the signature a name. For example, I might call my signature Karlen.

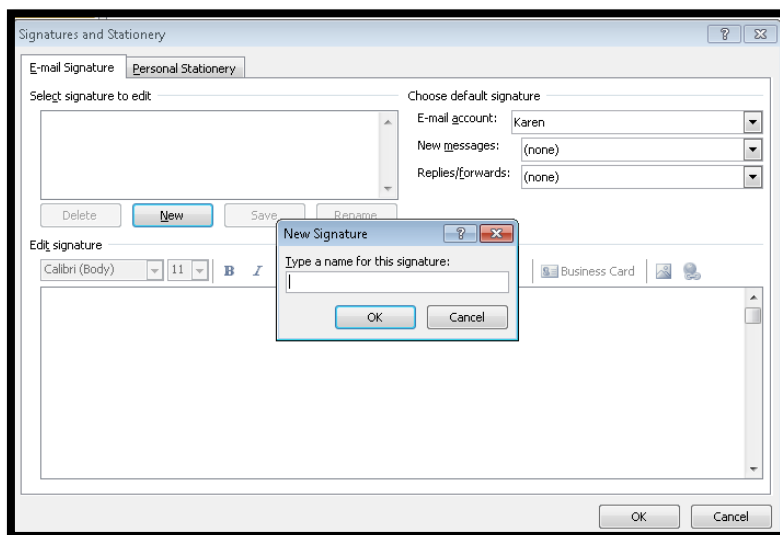


Figure 46 Signature dialog open with New signature dialog open on top of it.

When you create a new signature, the dialog changes, the new signature is added to the list and you can now make some decisions about the signature.

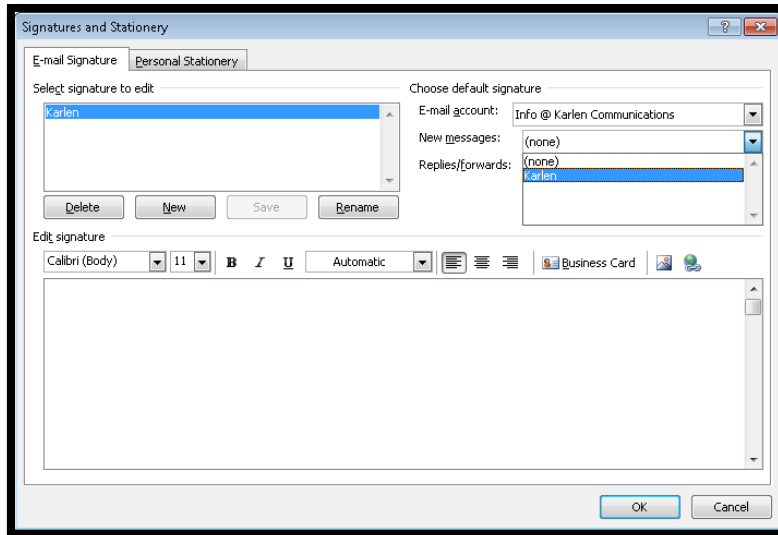


Figure 47 New signature dialog.

The dialog has the list of signatures in the upper left, the following list boxes in the upper right followed by a set of tools that include font, font size, formatting and alignment and the lower half of the dialog has the edit area where you can type the signature information.

Press Alt + A to use the new signature for a specific account.

Press Alt + M to use the signature for new messages from that account. This is a drop down list with none and any signature's you've created listed. You can use first character navigation to open the list and move to a specific signature.

Press Alt + F to use the signature when replying or forwarding messages. This is a drop down list with none and any signature's you've created listed. You can use first character navigation to open the list and move to a specific signature.

Once you've decided which account your signature will be used on and whether it will be used for new messages only or for messages you reply to or forward, press Tab to move through each of the formatting options such as font, font size, bold, italic, underline, alignment, adding images or links and finally to the edit area of the signature dialog where you can add some content.

JAWS will tell you this is not an Outlook edit box or area but ignore this. You can add edit information in the signature. There is no keyboard command to quickly move to the edit area unless you move from the OK button backward. So it is a judgement once you choose a signature to edit which way you get to the edit area.

You have to keep using Shift + Tab back through the formatting tools if you want to add different formatting to your signature.

One piece of advice when creating a signature for e-mail is that if you are using that signature for accounts where you send mail to lists or discussion groups, your contact/signature information will be added to your post. If you don't want a lot of spam it is a good idea not to put too much specific information into the signature.

You can add an image to a signature, however, choose the image size wisely. In the sample where I used an image from the sample images that come with the computer, I could not resize the images even if using the mouse and getting the resizing handles around the image.

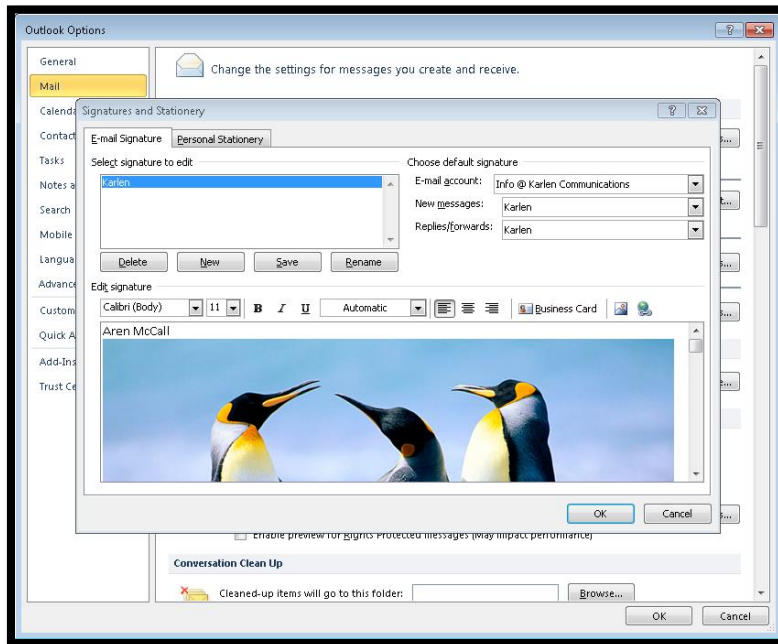


Figure 48 Picture inserted into a signature.

Once you have finished creating or editing your signature, press Alt + S to Save it. You cannot save a signature until you create it and add some content to it. Until that point, the Save button is not available.

I haven't found a way to add Alt Text to images in signatures. If you are concerned about accessibility it might be a better approach to create a new e-mail template or Theme and use it when you want to.

If you want to go back and edit a signature, press Alt + F, T, go to the Mail category, Tab into the Mail options, press Alt + N for Signature and then locate the signature you want to edit in the list. Tab to the edit area and make any changes you need.

Once you create a signature, you can press Alt + D to Delete it, Alt + R to Rename it, Alt + S to Save any changes or Alt + N to create a New signature.

If you choose to have one default signature, each time you compose a message, the signature will be inserted automatically in the body of the message

If you want to choose when you add a signature, press Alt + N, A, S for Insert Ribbon, Add Signature when in the body of a new e-mail message.

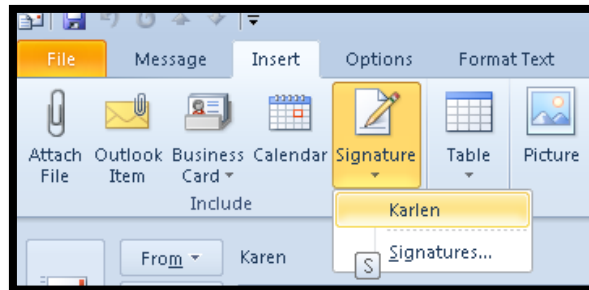


Figure 49 Add Signature option from Insert Ribbon.

Create a Message Template

If you want to create your own unique message template, open a new mail message and add the colours, images, Theme elements and any other formatting you want.

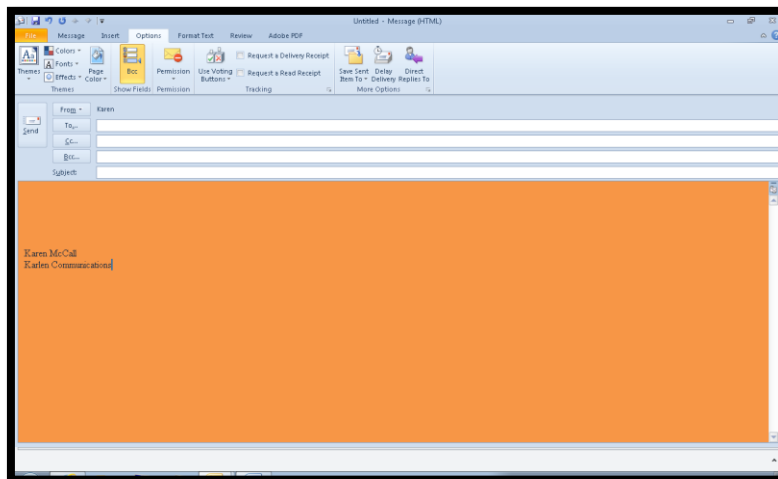


Figure 50 Karlen Communications mail message Template.

The colour I chose for the background of my mail message template is a medium orange which will create readability barriers but did it so you can see how background affects readability.

Once you have the mail template the way you want it, press Alt + F, A for File/Backstage area, Save As. You can also press F12 and if you are thinking of moving to the next version of Office I would suggest getting into the habit of using F12 to open the Save As dialog in all applications.

Give your message template a name and press the tab key to move into the Files of Type edit area. Choose Outlook Template. Make sure that the template will be saved in your Microsoft Templates folder on your hard drive with all other Office templates. Then Tab to and activate the OK button.

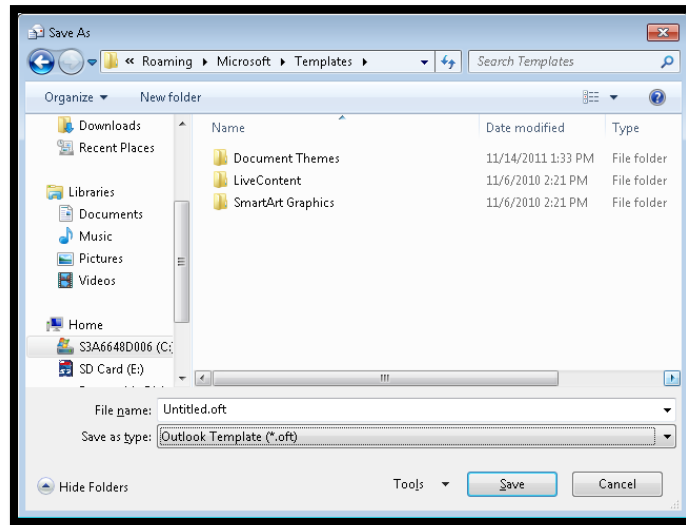


Figure 51 Save As dialog showing Outlook Template as the file type.

To use the message template:

With the Inbox or any other mail folder in use, press Alt + H, letter I, U, M for Home Ribbon, Outlook Item, E-mail message Using, More Stationary.

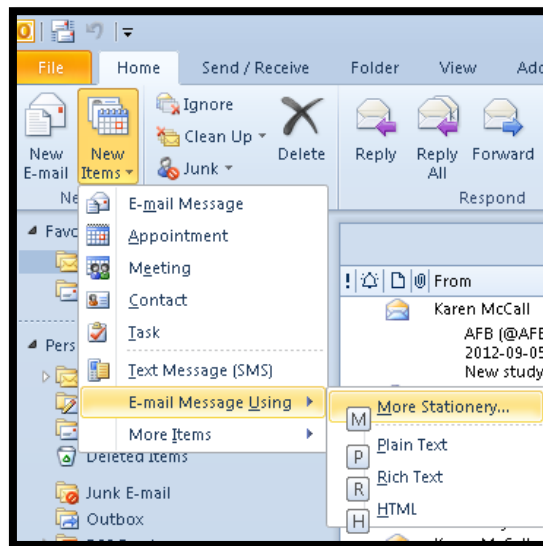


Figure 52 Use a specific stationary for a specific message.

When you choose More Stationary the dialog opens with the list of Themes. Unfortunately you can't use first character navigation to find your stationary. Also, despite verifying that the Karlen Communications Outlook stationary was in the right place, it would not show up in the list of stationary...even after restarting the computer.

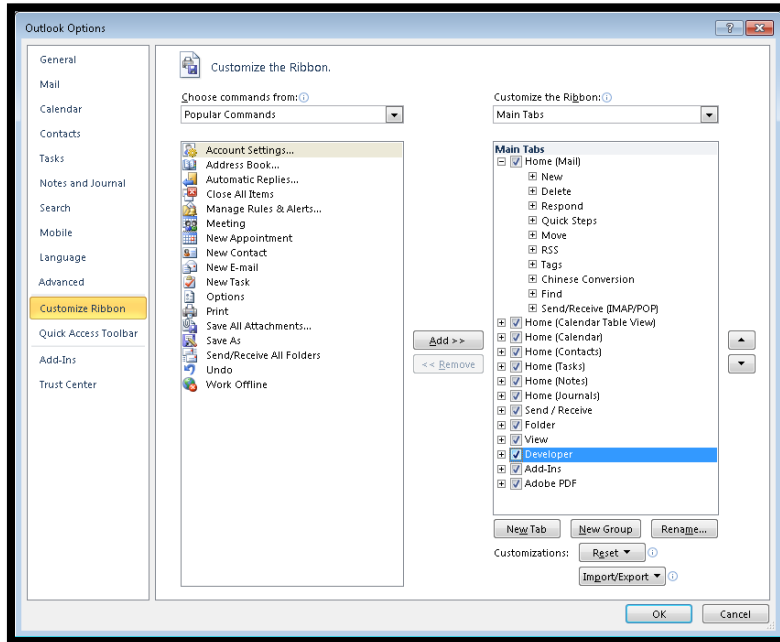


Figure 53 Customize Ribbons options showing Developer Ribbon checked.

Once the Developer tab is visible, press Alt + D, F for Developer tab, Choose Form. This opens a dialog where your focus is in the type of form to use. Even though you will be using an Outlook template, for some reason it is identified as a form.

Press the letter U to choose User Template from System. This takes you to the folder on your hard drive where templates for Microsoft applications are stored. The folder address is provided as well as the list of templates you've created.

Press Tab once you have chosen the user templates which takes you to the location on your computer where the default Microsoft templates are located. If you did not save the template in that location, this is where you can change the location of the template you are looking for.

Press Tab once the location for the template is chosen to move to the list of templates you've created. Use the Up and Down Arrows to locate the template you want, in this case it is the Karlen Communications template.

Press Enter and the template opens and is ready to use.

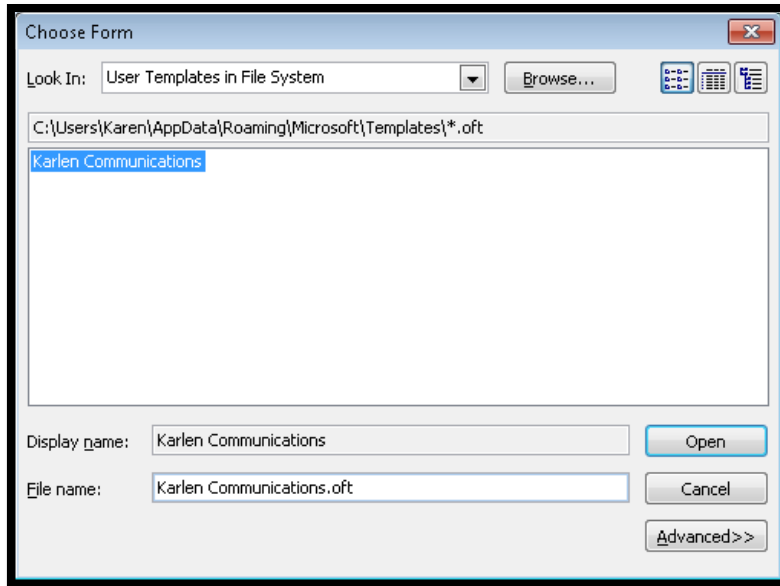


Figure 54 Choose a form/mail message template.

The following image shows the Karlen Communications template that was created, saved and then opened from the Developer tab.

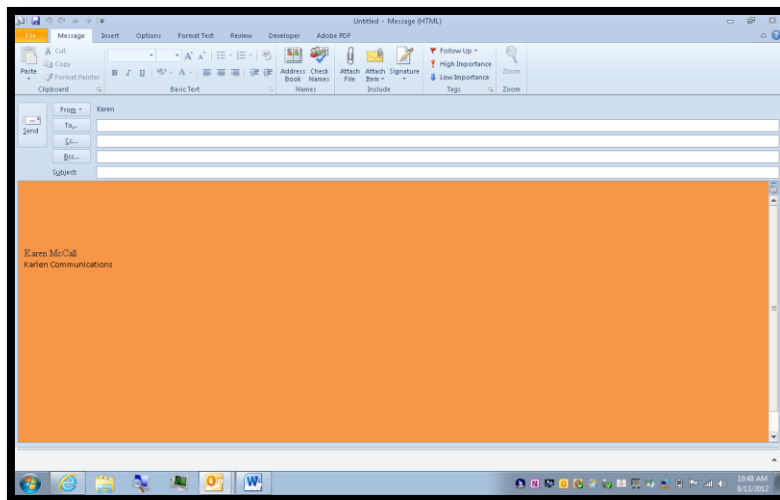


Figure 55 Mail message template opened and ready to use.

Contacts

To go to your Contacts, press Ctrl + 3.

There are two ways to create a new contact, press Ctrl + N for new contact while in the Contacts tool; or press Ctrl + Shift + C when in other Outlook tools.

In order to create a business card or vCard for your e-mail, we need to set you up as a Contact.

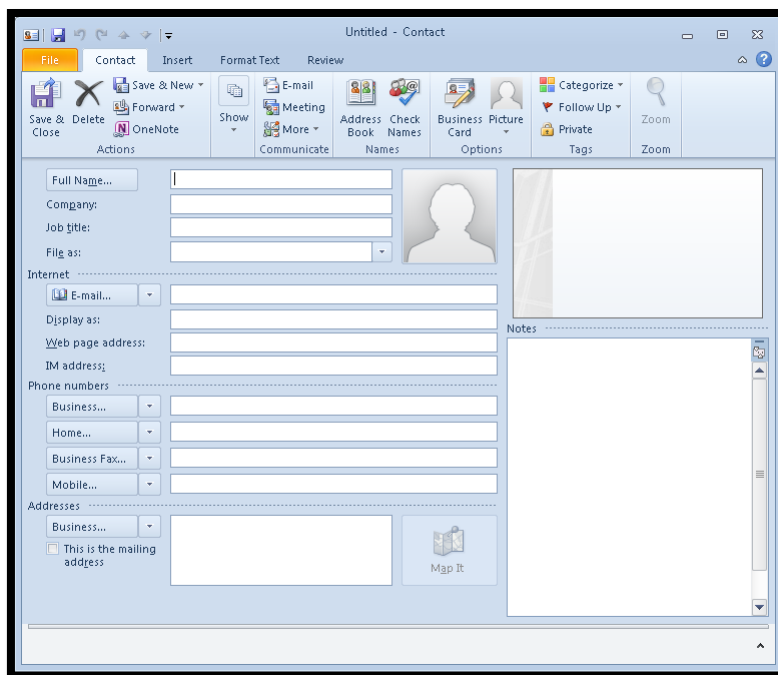


Figure 56 New Contact dialog.

Note: If you are using JAWS, Alt + M will give you a list of fields in the Contact Card and, using your Up or Down Arrow, or the first letter of the field you are looking for, you can move to that field in the list. Pressing Enter will take your focus to that field where you can type the required information. This saves time if you are filling in specific fields for each contact.

To create a Contact Once you've opened the new Contact dialog:

1. Type your name in the Full name edit box.
 - a. The keyboard command to move back to this edit area if you make a mistake is Alt + M which opens the Full Name dialog rather than take you back to the edit area.
 - b. If you press Alt + M while using JAWS, a list of form controls for the Contact card opens.
 - c. If you are using JAWS and want the Full Name dialog, press JawsKey + Number Row 3 to bypass the list of form controls and then press Alt + M to open the Full Name dialog.
2. Press Alt + P to move to the Company Name edit box.
3. Press Alt + T to move to the Title edit box.
4. Press Alt + E to choose how to file the contact, by last name or first name.
5. Press Tab to move to the Contact Picture button. Press Enter to open the location of a picture, choose your picture and then press Enter to add it.
 - a. Once you add a picture, the Contact Photograph becomes a link. If you want to change or remove the picture press the AppKey or right click on the image and then choose: Change Picture, Remove Picture or Copy.
6. Press Tab to move to the E-mail button where you can choose from your list of Contacts although this doesn't quite make sense to me, it is there.
7. If you press Tab again there is a drop down list where you can choose: E-mail, E-mail 2 or E-mail 3 for the contact. This would be part of their contact information not yours. For example you still can't associate one of your e-mail accounts with that of a contact. You have to remember to do this each time you send someone a mail message.

- a. You will need to press the Spacebar to open these options.
8. Press Tab to move into the E-mail edit box where you can copy and paste or type in the e-mail address of your contact.
9. Pressing Alt + W should take you to the edit box for the person's web page address but what it actually does is to open a new e-mail message with the contact card as an attachment so that you can forward the contact to someone else. Oops.
10. Pressing Alt + Shift + Semi-Colon takes you to the IM address edit box.
11. Press Tab to move to the business button where you can enter the person's phone number. If you press Enter on this button you are taken to a dialog with the following fields to fill in:
 - a. Alt + C for country/region which is where your default focus is.
 - b. Alt + A to enter the area code.
 - c. Alt + L to enter the local number.
 - d. Alt + E to enter an extension.
12. Tab to and activate the Ok button when you've entered the phone information.

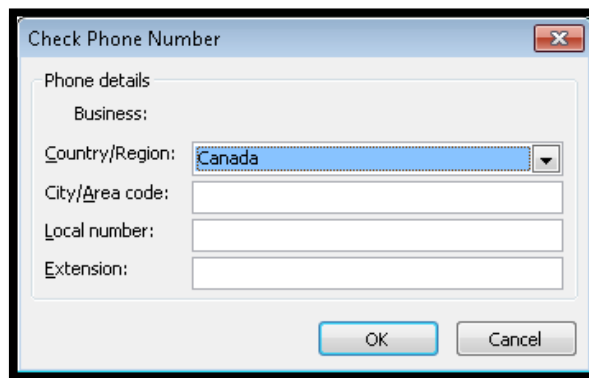


Figure 57 Business phone dialog.

13. Pressing Tab again will take you to an edit box where you can enter the phone number directly.
14. There are three more sets of these controls, one for home, business fax, and Mobil. There are no shortcut keys to move through these, you need to use your Tab key.
15. After the Mobile edit box, pressing Tab will take you to the Address area of the contact "card." You will hear "Business button." There is no shortcut key to get there.

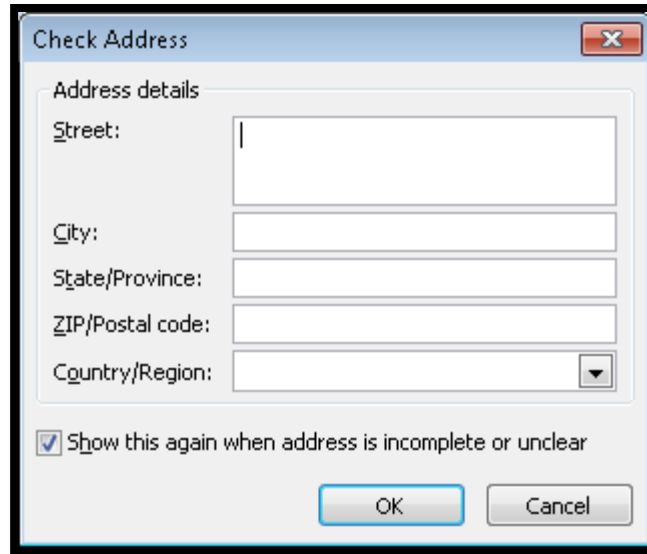


Figure 58 Business address dialog.

16. If you press Enter on this button a dialog opens with the following fields:
 - a. Alt + S for Street which is where your focus is.
 - b. Alt + C for City.
 - c. Alt + T for State or Province.
 - d. Alt + Z for Zip code or Postal Code.
 - e. Alt + O for Country or region.
 - f. Alt + s for show this again when address is incomplete or unclear.
17. Tab to and press Enter on the OK button when you are finished. You are returned to the Contact card.
 - a. If you Tab to the Business Address button and press Tab again, you'll move to the Enter multiple address button. If you press enter on this button you have a list of other addresses you can enter for this person such as home and other. Use the Up or Down Arrows to make your choice and press enter.
18. Pressing Tab again will take you to the address edit box where you can simply type in the person's address.
19. Press Alt + R to move to the "Use this as the mailing address. There is more than one item in the Contact Card that uses the letter R as the shortcut key so when you land on the check box, use the Spacebar to check it.

20. If you press Tab again you'll land on a link to a business card. I've tried pressing both Spacebar and Enter on this link and it doesn't seem to do anything. There is a keyboard command just after the check box to use the address as the mailing address, Alt + A which says it will "Map to" which might be the same link but even using the mouse it does nothing. You may have to have a business card scanned or set up for the contact in order to use this link.
21. Pressing Tab again will put you in the "message" edit area which is really the Notes area of the card. There is no way of getting out of this edit area unless you press a keyboard command to move to another area of the Contact Card. Pressing Tab only indents your text from the cursor point. Shift + Tab will either out dent the text or do nothing if you are at the first line of the note.
22. Once you've finished entering this basic information, press Alt + S to Save and Close this Contact card.

A helpful tool for Contacts is Ctrl + Shift + D which will dial a Contact if your focus is on that person's card.

Press Escape when you are finished to return to the list of Contacts.

Contact Details

If you are familiar with Outlook 2003 and the tabs in the Contact dialog, you'll know that there should be a place to add more details about the contact such as birthday, anniversary or the department they work in.

This tool is now on the Home Ribbon in the Contact Card. Press Alt + H, T, A. The view of the contact changes and your focus is in the Department edit box.

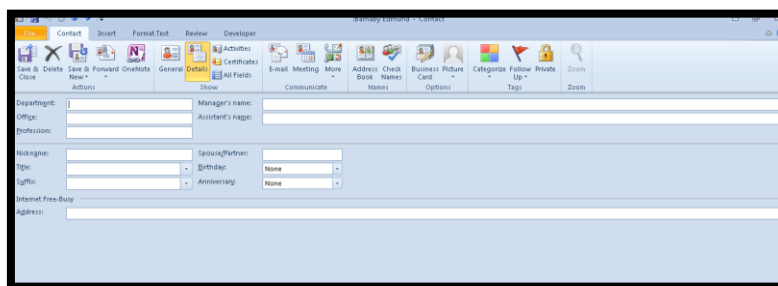


Figure 59 Details for a contact.

Press Escape when you are finished to return to the list of Contacts unless you've made changes and want to save them. If you have made changes, either press Alt + S to save and close or press Escape which will give you a dialog asking if you want to save the changes you've made to the Contact Card.

Monitoring Activities for a Contact

The best way to keep track of messages and appointments for Contacts is to use the Activities tool from the Home Ribbon.

Press Alt + H, A, Z to change the view of the Contact Card to the activities section.

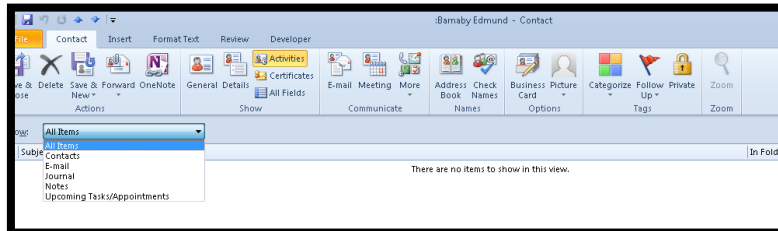


Figure 60 Activities view of a contact.

The Activities view lets you show all items, tasks, journal entries [if you've set them up], notes, upcoming appointment with the contact or just e-mail items.

When you move to the Activities view, your focus should be on the show combo box. Use the Up or down arrow to make a choice. The default choice is to show all items. Wait for a few seconds for the information to load onto the screen, then press tab to move into the list.

Once you are in the list of activities, use the Up or Down Arrows to locate an item.

Press Enter on it to open it and review it. You can press Escape once you've finished to return to the list of activities.

Note: As with other views while in a Contact Card, although Alt + W is indicated as a shortcut key to an action, in this case it should take you to the “Show” options, in fact it takes you to a new mail message where you can forward the contact to someone else. This is the behaviour we saw while in the contact information view.

Once you've reviewed an item and are returned to the Activities view of the Contact Card, your focus is back on the Show combo box. Press Tab to move back into the list of found activities to continue reviewing activities for the contact.

To return to the default view with the information for the contact, press Alt + C.

Press Escape when you are finished to return to the list of Contacts or “Card View.” If you've modified the contact information, press Alt + S to “Save and Close.”

Contact Certificates

Certificates are for digitally signed e-mail from trusted sources. You can get secure certificates by following the instructions in the Certificates view of a contact.

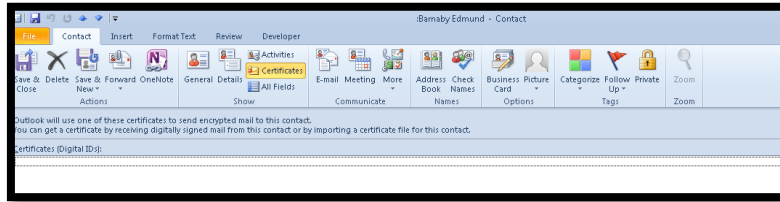


Figure 61 Certificate view of a contact.

To move to the Certificate View of a contact press Alt + H, A, F while the Contact Card is open.

Show All Fields

You may want the flexibility to define what fields are available for contacts. Press Alt + H, A, E to go to the Show Fields view/options for contacts. By default focus is on the combo box to use User Defined Fields.

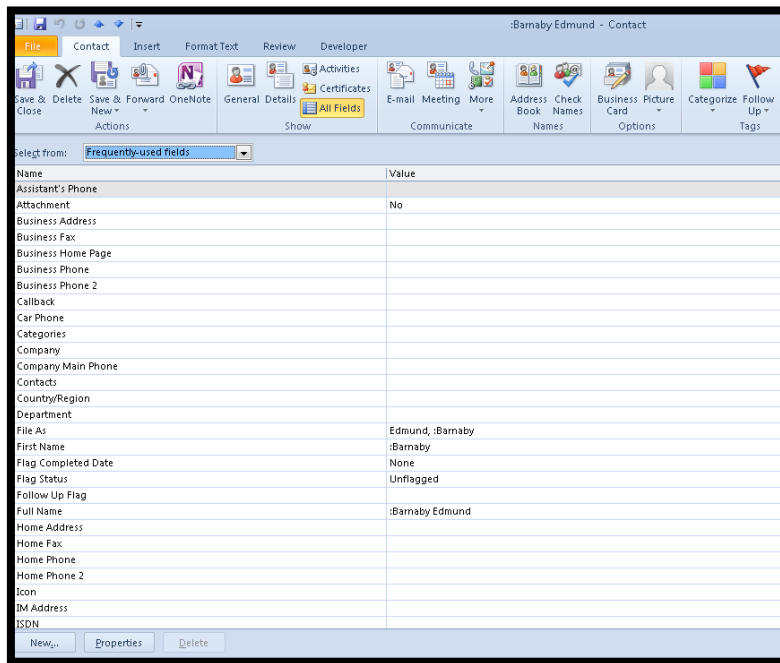


Figure 62 Show Fields options for User Defined Fields.

Any fields that are currently being used will have the information next to them so you know which ones are already in use.

Finding Contacts

If you want to find a contact when you are in any of the Outlook tools, press F11. This will move your focus to what was the Ask a Question edit box but is now the find a Contact edit box. You will need to go into forms mode to use this.

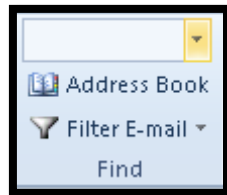


Figure 63 Find a Contact edit box in Home Ribbon of Inbox.

Type the first or last name of the person you need contact information for and press the Enter key. Their Contact Card will open and you can retrieve or modify any information. Press Escape when you are finished or Alt + S to Save and Close if you've made modifications. The tool you were working with in Outlook is there for you to work with again.

Deleting Contacts

To delete a Contact, select the contact name in your list of contacts. Press Delete, which will delete the Contact without asking you to verify the deletion. If you've installed the Office sounds, you will hear a sound as the file is deleted. It is the same sound you hear when you delete an e-mail message. If you hear the sound and realize you've pressed the wrong key and want the contact information back, press Ctrl +Z to Undo the action, or press alt + E for Edit, listen to the undo item and press Enter to undo delete.

Calendar

You can move to the Calendar by pressing Ctrl + 2. If you are in another tool of Outlook, press Ctrl + Shift + A to create a new appointment. If you are in the Calendar, press ctrl + N to create a new appointment.

In the Calendar, the best view for people using a screen reader is the Active view. To ensure that this is the active view, press Alt + V, C, V for View, Current View. Press the right Arrow to move to the Active icon and press Enter.

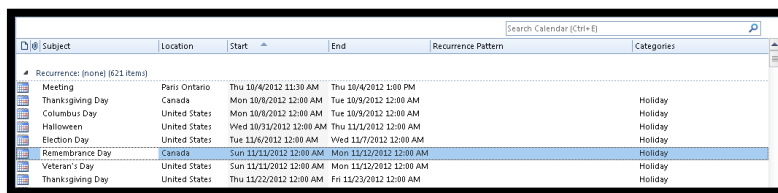


Figure 64 Active appointment list in Calendar.

Note: If you choose List view of your Calendar it will show all holidays and appointments you have had since installing Outlook. In my case the list went back to 2009.

This will display any upcoming appointments in chronological order. You'll be able to use the Up or down Arrows to navigate through the list.

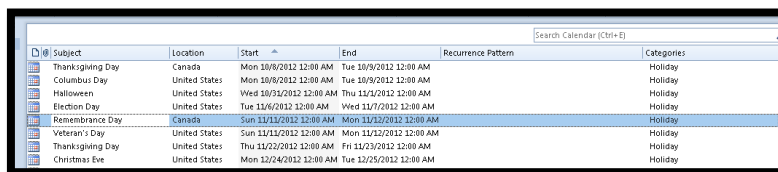


Figure 65 List View of Calendar.

Another Calendar view that is accessible is the Day view or Preview. To switch to Preview in your Calendar press Alt + V, C, V and instead of choosing active choose Preview.

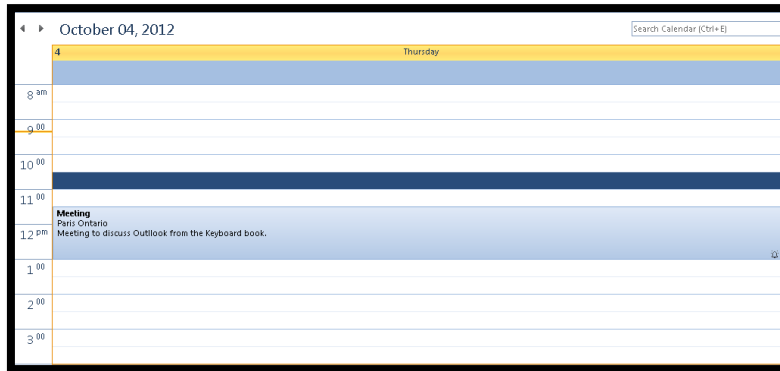


Figure 66 Preview or day view in the Calendar.

Go to a Specific Date

While in either Calendar or Preview of the Calendar you can easily go to a specific date and view appointments for that date by pressing Ctrl + G to open the Go To dialog. Your focus is in the Go to date combo box and today's date is entered. Modify the contents or type in a different date and press Enter.

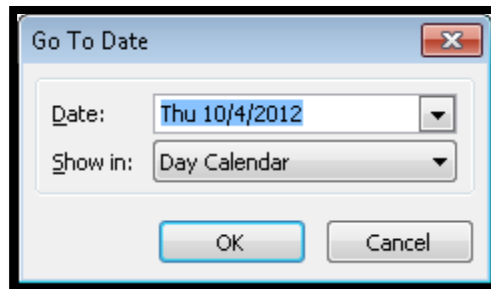


Figure 67 Go To dialog in Calendar or Preview view.

This does not work when you are in Active or List view of the Calendar.

Create an Appointment

We've now found a view of our calendar and appointments we like and are ready to add more appointments to our already busy schedule.

To create a new appointment in the Calendar:

1. Press Ctrl + N for New Appointment. This opens a dialog into which you can enter appointment information.

2. Your focus is in the edit box where you can type in a subject for the appointment.
3. Press Alt + letter I to identify a location for the event. You can also press Tab to move from the name of the appointment to the location edit area.
4. Press Alt + T to move to the Start Date edit area.
5. Press the Tab key to move to where you can select a time for the event to start. Use the Up or Down arrows to select a time.
6. Press Tab to move to a check box that lets you indicate if this is an all-day event.
 - a. You are supposed to be able to press alt + V to automatically check this option once you've entered a date. However this keyboard command conflicts with Alt + V for the View Ribbon so when you press the command, your focus is taken to the View Ribbon not the check box for all day event.
 - b. Checking All Day Event turns off other options related to time and end dates as the Calendar will look at this as an all-day event with no other appointment options for that day.
7. If this isn't an all-day event, once you've set the start time, press Alt + D for End Date. Your focus is moved to an edit box where you can type in the end date of the event. Outlook assumes that the event ends on the same day it starts and has automatically filled in this information. Use the same date format to change the end date of an event.
 - a. The keyboard command for the End Date is Alt + D however if you have the Developer Ribbon visible, this is a conflict and pressing Alt + D will move you to the Developer Ribbon not the End Date for the appointment.
8. Press the tab key to move to where you can modify the end time of the event. By default, Outlook assumes you want to end the event in half hour increments. We'll take a look later at how you can modify appointment time frames.
9. Pressing Tab again will take you to an edit area where you can enter notes. In order to get out of this area, you'll need to press Shift + Tab as Tab will insert a tab stop into the text.

If you want the event to show as private, you can press Alt + P.

Note: You can't press the first letter of an appointment to find it. This will activate an edit feature of the appointment which lets you change the name or title of the appointment. For example, I created an appointment called meeting. If I press M for meeting, I am in edit mode at the time my cursor is at and can enter a subject for a new appointment. This lets me quickly enter an appointment and come back to it later to add more details.

If you press Enter on an existing appointment you will be in edit mode to add a conflicting appointment to your Calendar. Keep track of where you are in your daily events to avoid creating conflicts. The JAWS screen reader will let you know of conflicts after you create them or while you are in the Appointment dialog.

After all of this, press Alt + S to Save and Close. You now have an appointment in your Calendar! You can also make some changes to an appointment or schedule appointments and meetings involving other people.

Reminder Time for Individual Appointments

Although there is a default reminder time of 15 minutes before an appointment, you can change this globally and for each appointment.

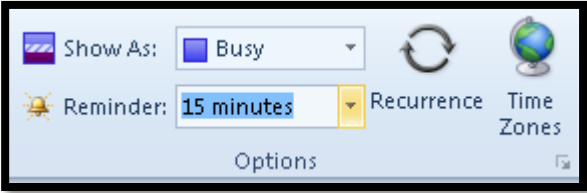


Figure 68 Reminder Time edit area for an appointment.

To change the reminder time for the current appointment while the Appointment dialog is open:

1. Press Alt + H, R, E while the new or draft message is open.
2. Change the time for the reminder by using the Arrow keys or typing a time in. Time is measured in minutes, so changing the time to something like 30 for 30 minutes or 1 hour or 2 hours and so forth will work.

Calendar Options

This section looks at some of the global settings for your Calendar such as identifying holidays, changing the default reminder time and identifying the start and end times for your Calendar.

Start and End Times

The default start time for your Calendar is 8AM and 5PM respectively. If this is too long a day for you or too short, you can change these settings by going into the Outlook Options.

To change the start and end times as well as the start day for the Calendar:

1. Press Alt + f, T for File/Backstage area, Outlook Options.
2. Press C to go to the Calendar category.
3. Press Tab which takes you to the start time list box and you can use the Up or Down Arrows to change the start time for the calendar.
4. Press Tab or Alt + E to move to the End Time and use the Arrow keys to change this.
5. Press Tab to move to the series of check boxes to choose the start of the work week. By default the start day for the work week is Monday.
6. Press Tab to move to the list to choose the start of the week. This is not the same as the start of the work week. This lets you choose whether to start the week with Saturday or Sunday or another day. The default start of the week is Sunday.
7. Press Tab again to move to the first day of the year list and the default is January 1.

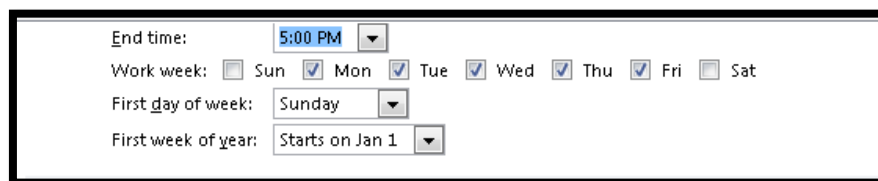


Figure 69 Start and end times for Calendar in Outlook Options dialog.

Add Holidays

You might want or need to know when holidays for your country are. You might also want to change the default reminder time from 15 minutes to several hours or days. These settings are found under the week stings in the Outlook Options dialog under Calendar.

Note: you can't go back into Add Holidays and deselect the holidays you've chosen to display. They all have to be removed manually. This means finding each holiday listing, selecting it and then pressing the delete key to remove it. I work globally and adding all holiday's clutters up my calendar so I enter holidays that affect me manually each year. This gives me control over only having those holidays where organizations are closed in the calendar.

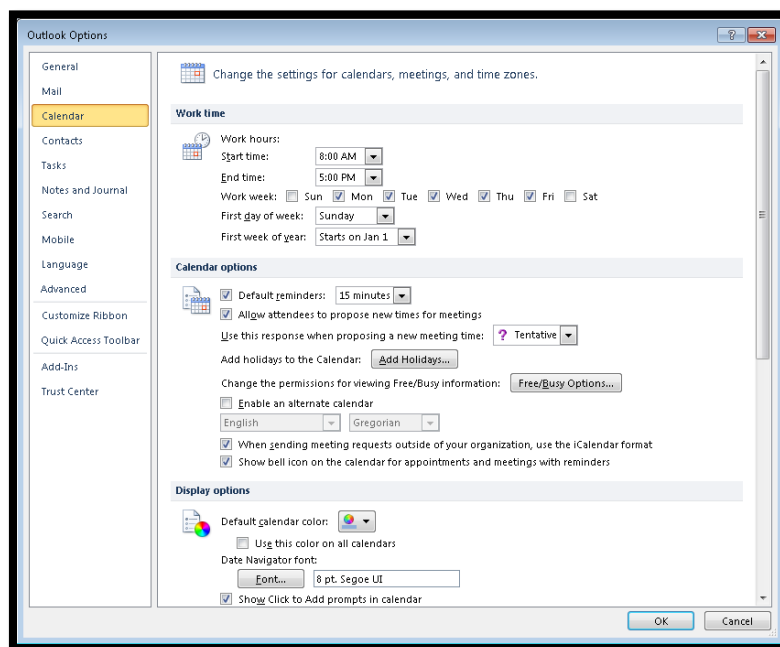


Figure 70 Calendar settings in the Outlook Options dialog.

To add holidays to the Calendar:

1. Press Alt + F, T to open the File/Backstage area, Outlook Options dialog.
2. Press C for Calendar which takes you to the Calendar category in the Outlook Options dialog.
3. Press Tab to move into the Calendar Options. Your focus is on the list box to identify the start time for your calendar day. The default is 8AM.

4. Press Alt + A to move to the Add Holidays button and press Enter.
5. Another dialog appears with checkboxes for each country whose holidays are available to Outlook.
6. Your focus is on the OK button.
7. Press Shift + Tab to move into the list of countries.
8. Use your Up and Down Arrows or first character navigation to find the country whose holidays you want to add.
9. You may add more than one country; however, as in the case of Canada and the United States where Labour Day falls on the same day, you will have two Calendar entries for this holiday. All holidays will appear in the Active Appointment view which may get in the way of your navigating through your own appointments.
10. Tab to the OK button and press Enter.
11. You are returned to the Outlook Options dialog, Calendar settings.
12. Tab to the OK button and press Enter.



Figure 71 Add Holidays dialog.

Reminder Time

Although you can change the reminder time for each appointment you might want to change the default reminder time or turn off a reminder for every appointment. The Reminder options are found under the Calendar settings in the Outlook Options dialog under Calendar.

To change the default reminder time:

1. Press Alt + F, T to open the File/Backstage area, Outlook Options dialog.
2. Press C for Calendar to move to the Calendar category.
3. Press Tab to move into the Calendar settings or press Alt + R to move to the Reminder check box. This is checked by default and pressing Alt + R will uncheck it because it is the only item in the Calendar options that uses that specific keyboard command.
 - a. If the Reminder check box is not checked there will be no reminder for every Calendar appointment and you will need to set any reminders manually.
4. If you uncheck the Reminder check box by accident, press the Spacebar to check it again.
5. When checked, you have access to the list box to set the reminder time. The default reminder time is 15 minutes before your appointment.
6. Use the Up and Down Arrows to change the reminder time.
7. Tab to the OK button and press Enter.

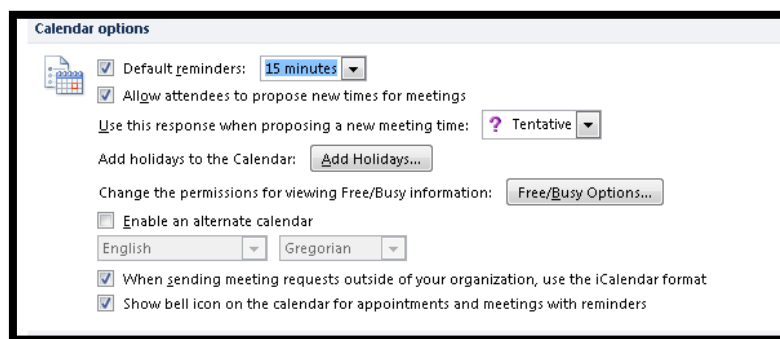


Figure 72 Calendar options for reminders and holidays in Outlook Options dialog.

This section of the Calendar settings includes the ability to use another calendar, identify appointment times as busy, invite others to meetings and use an iCal format for invitations going to people outside of your organization. Take some time to explore the options you might need.

Calendar Colours and Font

If you are using ZoomText or have colour deficits and can't see the default blue calendar colours easily, you can change the overall colour of how the calendar is displayed.

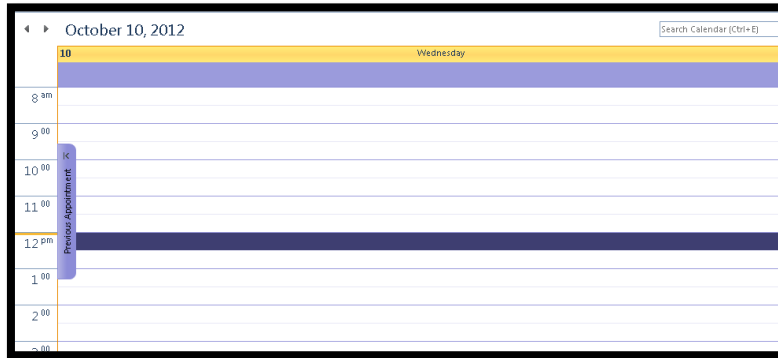


Figure 73 Default Calendar colours shown in Day View.

To change the calendar colour:

1. Press Alt + F, T for File/Backstage area, Outlook Options to open the Options dialog.
2. Press C for Calendar.
3. Press Tab to move into the Calendar options.
4. Press Alt + C to move to and open the colour palette for the current calendar.
 - a. JAWS does not read any of the Calendar Colours.
5. You can use the Arrow keys to choose your colour or click the colour you want with the mouse.
6. There is an option to use the colour you choose on all Calendars or just the current one. By default the colour will be used on the current calendar.
7. Press Alt + S to move to and check the check box to use the colour you choose on all Calendars. This is not checked by default and appears just under the colour choice option.
8. Tab to and activate the OK button to change the Calendar colour.

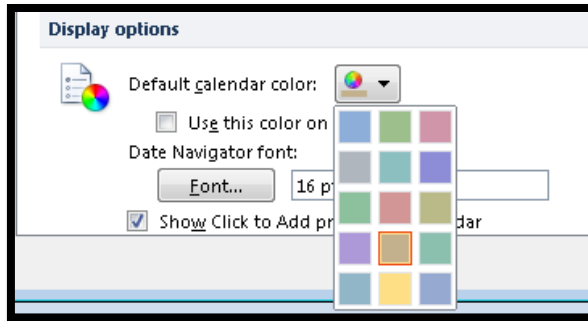


Figure 74 Colour palette open to change colour of Calendar.

Your Calendar colour is immediately changed when you activate the OK button in the Outlook Options dialog.



Figure 75 Calendar with new colour scheme applied.

To change the Font for the month view of the Calendar only:

1. Press Alt + F, T for File/Backstage area, Outlook Options which opens the Outlook Options dialog.
2. Press C to move to the Calendar options.
3. Press Tab to move into the Calendar options.
4. Press Alt + F to move to and activate the Font button.
5. In the font dialog that opens choose your font style and font size.
6. Tab to and activate the OK button.
7. You are returned to the Outlook Options dialog.

8. Tab to and activate the OK button.

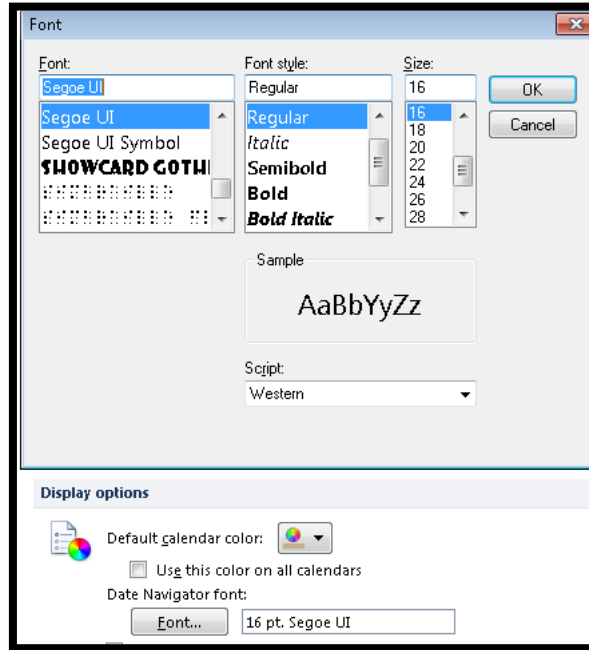


Figure 76 Font dialog in Calendar settings of Outlook Options dialog.

When you switch to Month view, any appointments will be displayed in your chosen font and font size.

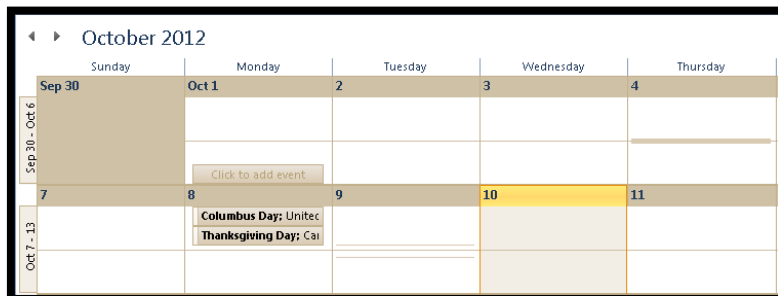


Figure 77 Month view with larger fonts for appointments.

The font is also larger for the Calendar in the Navigation Pane to the left of the main appointment area.



Figure 78 Calendar in Navigation Pane with larger font.

Categorizing Appointments

Sometimes you might want to distinguish one appointment from another visually. Support for categories is still sporadic if you are using JAWS. In most cases if you've flagged a message and categorized it, JAWS will not even read the flag...which it would do without the category added.

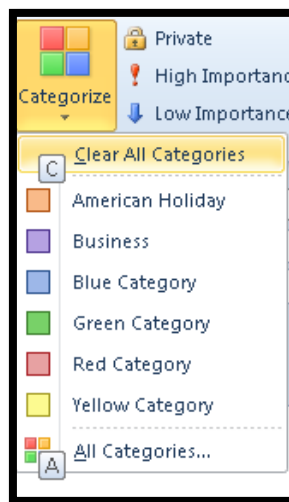


Figure 79 Categories sub-menu from Home Ribbon.

There is one built-in Category name: Business. The other Categories are identified by their colour until you choose to use them. When you choose to use a Category colour for the first time, a dialog will open asking if you want to give the Category colour a name. By default it will be something like Blue Category or Yellow Category.

Press Alt + H, G to open the Category sub-menu. There are two keyboard commands you can use: A for All Categories and C for Customize Categories. These tools let you see all possible colours or to create a custom colour Category.

In the example used for this book I chose to create a Category called Canadian Holiday and one called American Holiday.

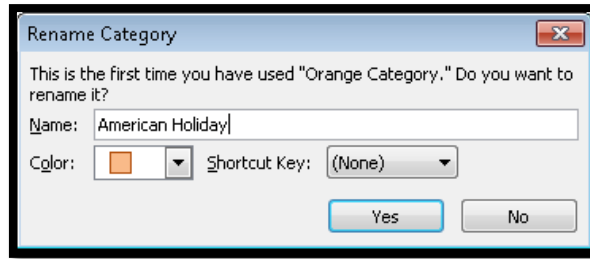


Figure 80 Give the Category colour a name on first use dialog.

Once you've named a Category for the first time, it will show up in the meeting you apply it to. You can also use Categories for e-mail messages and Tasks.

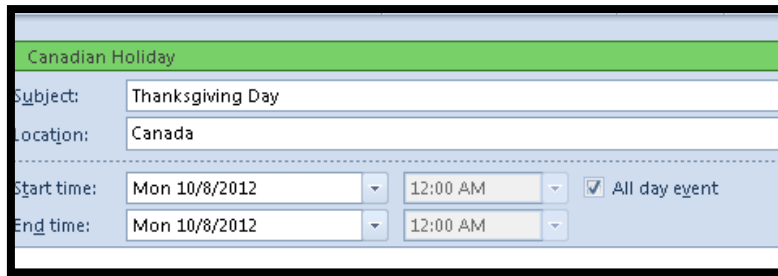


Figure 81 Meeting showing the Category colour.

You can see a Category in the Month view of your Calendar.

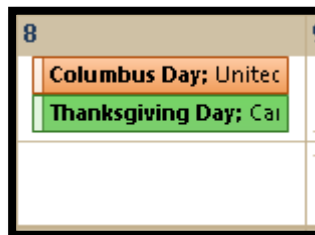


Figure 82 Month view showing one day with two categorized appointments.

If you are working in the Day view of your Calendar the Categories will appear just above the day itself for an all-day event; or for each individual appointment during the day.

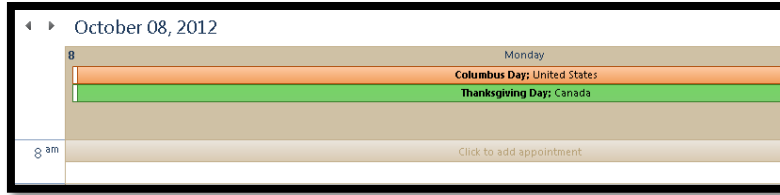


Figure 83 Day view of Calendar showing two all day holidays categorized.

Using Categories for appointments makes them easier to see during the day or in a Month view of the Calendar. Hopefully screen readers will support this tool in the future. Even those of us using screen readers would benefit from knowing if something quickly entered into a Calendar as “Meeting” were for business or pleasure.

Recurring Appointments

There is a lot of flexibility when you enter an appointment as to how often it recurs. For a single appointment you don't have to worry about this. If, however, you will be at a conference for a week or few days or if you have bills that need to be paid on the same date every month, you can enter those as recurring events complete with reminders.

Press Alt + H, E for Recurring Appointment.

This opens a dialog with several options.

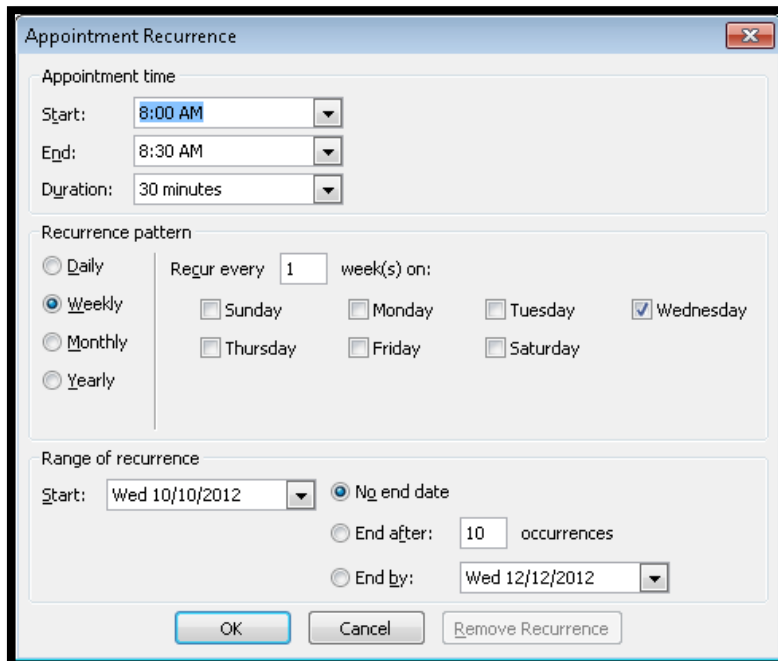


Figure 84 Recurring Event dialog.

By default you are in the Start time list. If you need to get back to it the keyboard command is Alt + T.

Pressing Alt + N will take you to the End time. This is also a list.

Pressing Alt + U takes you to the edit area for the Duration.

The next part of the dialog is where you decide whether your recurring event is daily, weekly, monthly or yearly. The keyboard commands are:

- Alt + D for Daily.
- Alt + W for Weekly.
- Alt + M for Monthly.
- Alt + Y for Yearly.

These are radio buttons so if you Tab into them you can use the Up or Down Arrows to find the one you want.

The choices for the recurring event change depending on what choice you make in terms of the event recurring daily, weekly, monthly or yearly. Although there are keyboard commands for each of these, I suggest pressing Tab from the radio buttons and exploring the various options.

For example if you choose weekly you can then decide if this is for 1 week, which day of the week and so forth. If you choose Daily, your choices change to set the recurring appointment every X number of days or every weekday.

You can also go directly to the bottom of the dialog where you have the following choices:

Press Alt + S to set a Start Date.

Press alt + Letter O to have No end date.

Press Alt + F to set an End after date. This has an accompanying edit box to enter a date.

Press Alt + B to set an End by date. This has an accompanying dialog where you can enter a date.

You can then Tab to and activate the OK button.

If you want to remove the recurrence, open the appointment and access the Recurring Event dialog then Tab to and activate the Remove Recurrence button.

If you try to edit any recurring appointment or delete one, you will get a dialog asking if you want to make changes or delete this one occurrence or all occurrences.

Change the Time Zone

If you are meeting with someone in another time zone you can indicate this on the appointment when you create it. You can also specify that the meeting is in your time zone to avoid confusion.

Press Alt + H, letter O, S to add the two time zone lists just after the area where you can enter the start and end times. The list is similar to that of the regional settings for your computer. Unfortunately you can't use first character navigation to find the time zone you want. When you change one, both time zone indicators change for each of the start and end times which is helpful.

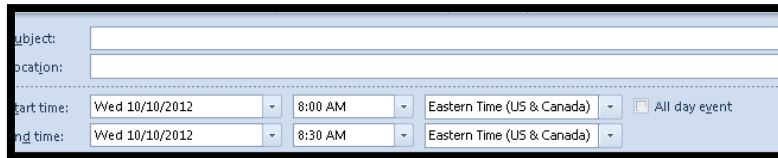


Figure 85 Time Zone list added for both the start and end times of an appointment.

Scheduling Meetings

Within Outlook, you can invite other people to a meeting.

Create your appointment and once it's created, press Alt + H, letter I to go to the Home/Appointment Ribbon, Invite Attendees. This puts a From area with the default e-mail account and a To field just above the subject line of the appointment. You can press Alt + M to change the account used to send the meeting request. You can press alt + Period to access your contacts list and choose the people you want to invite to the meeting.



Figure 86 Invite Attendees in the Home/Appointment Ribbon.

When you choose to invite attendees the Attendees area of the Home/Appointment Ribbon changes to give you some options: to cancel the invitations, to use the address book to find attendees, to check names and to choose response options.

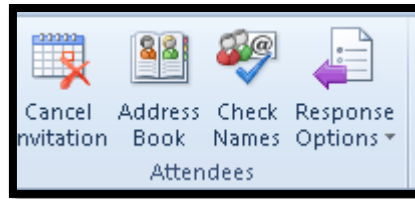


Figure 87 Attendee options once you choose to invite attendees to a meeting.

There are two options under the Response Options button: to request responses and allow new time proposals. Both are checked by default. Press Alt + H, A, R to open the list of Response Options.

The Location area of the appointment has the ability to choose from a drop down list of commonly used locations for meetings.

In previous versions of Outlook the Meeting Workspace button was in the menu or on the Ribbon. It has been removed from the Ribbons in Outlook 2010. You will need to put the Meeting Workspace icon on the Quick Access Toolbar if you want or need access to Meeting Workspace.

Make sure that you have a new meeting dialog open when you add the Meeting Workspace to the Quick Access Toolbar. Meeting Workspace is found under the Popular Commands section of the Quick Access Toolbar area of the Outlook Options dialog.

To add the Meeting Workspace icon to the Quick Access Toolbar:

1. Press Alt + F, T to open the Outlook Options dialog.
2. Press Q for Quick Access Toolbar.
3. Press Tab and you move into the Quick Access Toolbar settings and your focus is on the type of commands listed. The default is Popular Commands.
4. This is what you want so press Tab to move into the list of Popular Commands for meetings.
5. Press M for Meeting Workspace. This should take you right to this item because it is the first item in the list that starts with an M.
6. Press Alt + A to Add Meeting Workspace to the Quick Access Toolbar.
7. Tab to and activate the OK button.

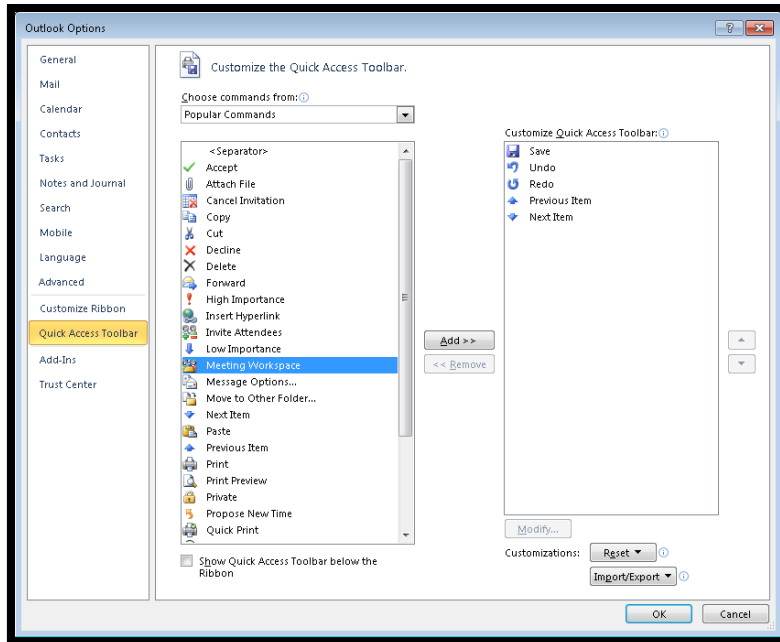


Figure 88 Quick Access Toolbar options for a meeting showing Meeting Workspace selected.

You can now press Alt + a number to open the Meeting Workspace pane to the right of the main area in the Meeting dialog. You will only have access to the Meeting Workspace once you've chosen to invite other people to the meeting (Alt + H, letter I in an open meeting dialog).



Figure 89 Meeting Workspace in the Quick Access Toolbar.

When you open the Meeting Workspace pane and put focus in it, you are on a link to more information. The link will open a help topic on creating and using Meeting Workspaces.

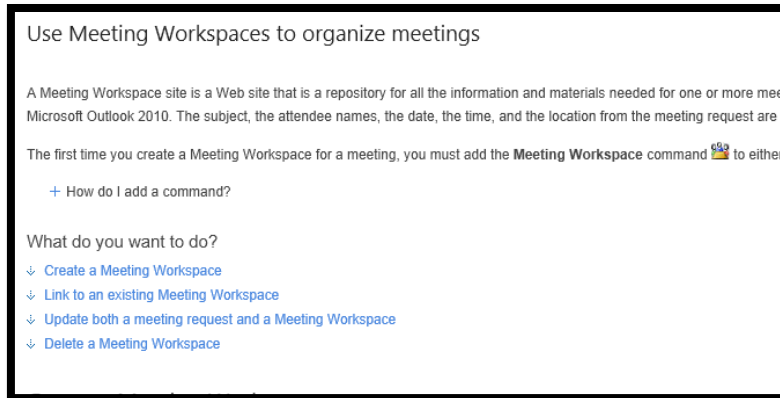


Figure 90 Help topic for the Meeting Workspace "More Information" link.

If you choose a meeting workspace, a Task Pane opens and lets you create the space based on pre-determined access to a meeting space.

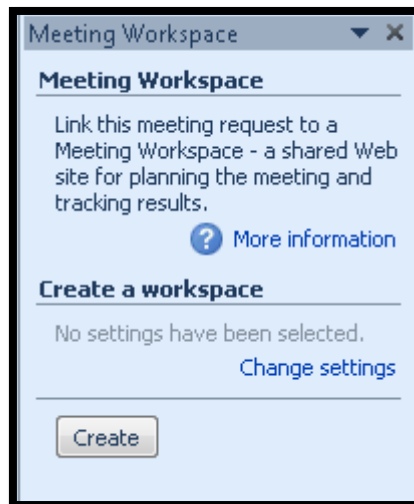


Figure 91 Meeting Workspace pane open to the right of the main appointment area.

The next item in the Meeting Workspace pane is Change Settings which is also a link. The information in the Meeting Workspace pane changes to let you create or use a workspace.

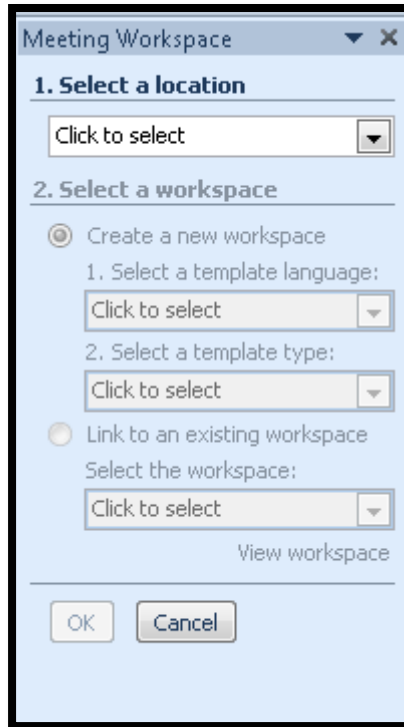


Figure 92 Change Settings for Meeting Workspace.

You must have access to a meeting website server in order to use this tool. I don't so the options are not available on my computer.

The advantage to using the meeting workspace is that documents can be uploaded to these sites instead of being sent through e-mail. If you are working with large documents or several documents, it is easier to keep track of them if they are located in one place everyone can access. A caveat to this is that your meeting workplace or online meeting space needs to be accessible to all participants in the meeting.

If a participant is no longer involved in the meeting, making that change in Outlook will automatically update the information in a meeting workplace. If you update the information in the meeting workplace, you will need to manually update the information in Outlook.

Accepting Meeting Invitations

If you are invited to a meeting, you can accept by pressing Alt + C for Accept, or Alt + D for Decline.

Sharing Files for Appointments, Contacts, and Tasks

If you aren't using a meeting workspace you can attach documents to an appointment. You can also do this if you are the only participant and want to remember which documents you need to review for the appointment. The documents are inserted as icons in the Notes area of the appointment. You can insert objects such as Excel charts, images, multimedia presentations or an Adobe Acrobat PDF document.

To insert a file or object, your focus needs to be in the Notes section of the appointment.

Press Alt + N, A, F which is the same keyboard command you press to add an attachment to an e-mail message. The icon in the Ribbon is the same as well...a paper clip.

. A dialog opens similar to the Open dialog you are used to working in. Choose the file from the folder you want and press Alt + S for Insert to insert the document into the appointment.

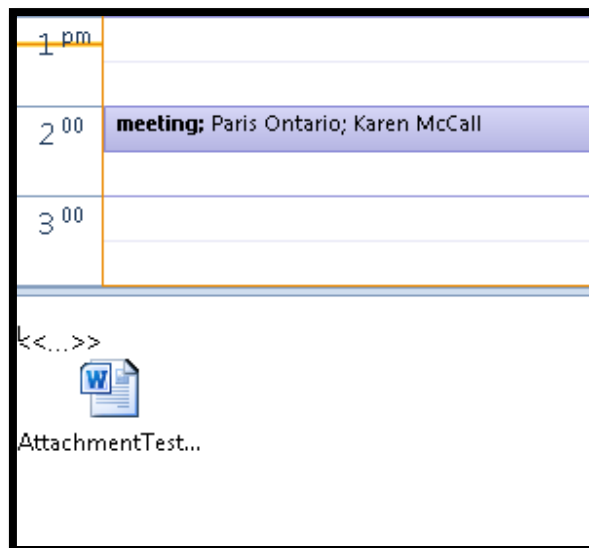


Figure 93 Embedded document in a meeting request.

Once the document or documents are inserted into the Notes area of the appointment, if you are using the JAWS screen reader you can press Ctrl + Shift + letter O for a list of objects in the appointment. If you are using a tool such as ZoomText, you can find attachments to appointments using the cursor or the mouse, but as a JAWS user, it is faster to get the list and see if there are any attachments.

If you have been invited to a meeting that has attachments, you will not know this when looking at mail in your Inbox. There is no way of knowing, unless the person inviting you puts text in the invitation message stating that documents are attached, to find attachments to meeting invitations.

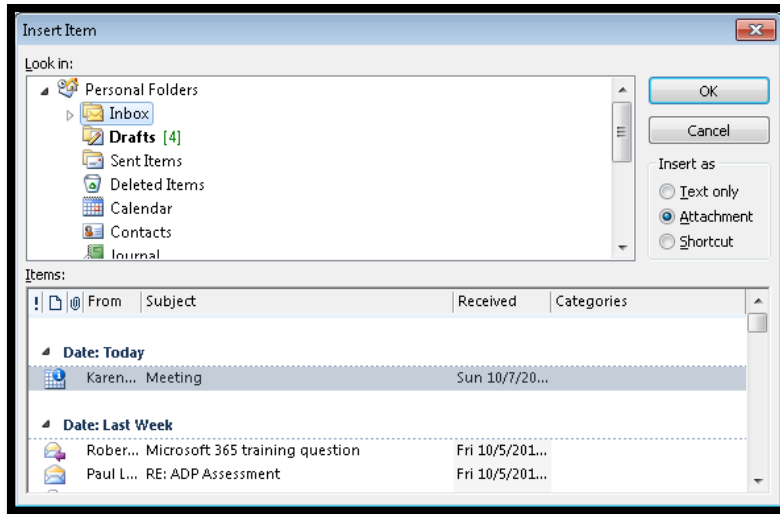


Figure 94 Insert Outlook Item dialog.

You can insert an Outlook Item such as an e-mail message, task or contact information into an appointment. To do this:

1. Press Alt + N, A, M. This opens a dialog with focus on your Inbox.
2. Choose the folder you want to insert the item from and press Tab to move to the list of messages in that folder.
3. To select an item you want to insert, press Alt + T to insert as Text Only, Alt + A to insert as Attachment, or Alt + S to insert as Shortcut.
4. Tab to the OK button and press Enter

Items can only be inserted one at a time. If you choose to insert text only, items will be listed from the first item you inserted to the last one.

You can insert files, items, or objects in the notes section of Contacts and Tasks.

Tasks

You can make notes on tasks or become part of a group's tasks using Outlook. When you move to the Tasks tool, you can customize the view.

Press Ctrl + 4 to move to the list of current Tasks.

Press Ctrl + Shift + K to create a new Task from anywhere in Outlook.

If you are in the Tasks tool, you can press Ctrl + N for New Task.

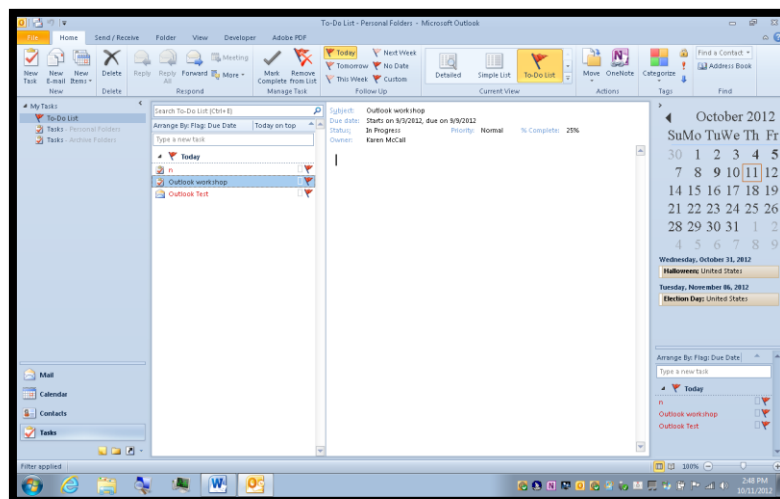


Figure 95 Task area of Outlook with a Task selected.

When the New Task dialog opens your focus is in the edit area to give a title or name to the task.

Press Alt + T to move to the Start Date or press Tab to get to it. Enter a starting date for the task.

Press Alt + D to identify a due date. Type in the month, day and year. If you have the Developer Ribbon showing you won't be able to use Alt + D as this keyboard command will take you to the Developer Ribbon. Use the Tab key instead to identify a due date.

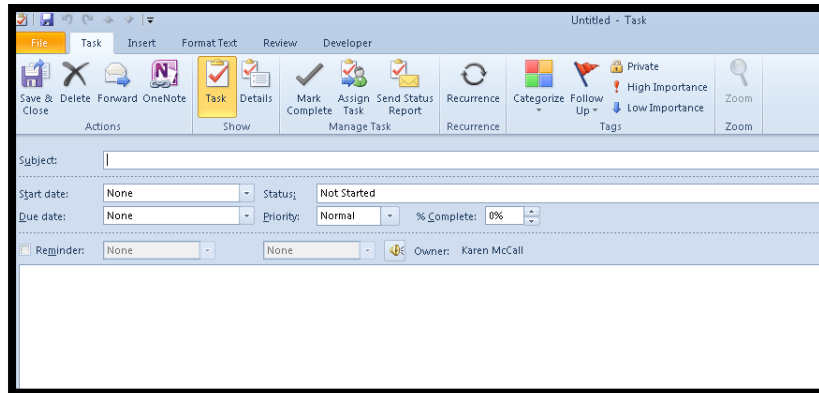


Figure 96 New Task dialog.

Press Alt + Shift + semi-colon to move to the Status list box. Your options are “Not Started,” “in Progress,” or “Completed.”

Press Alt + P to set the task priority. Your choices are Normal, Low or High. If you have Adobe Acrobat installed on your computer pressing Alt + P will take you to the Adobe \PDF Ribbon. Use the Tab key instead to get to the Priority setting for the task.

Press Alt + C to enter a percentage of the task that is complete. You can use the Up or Down Arrows to identify pre-determined increments.

Alt + M will let you set a reminder alert. If you check this check box, which is not checked by default, you can then set a date and time for the reminder. Use the Tab key from the Reminder check box to move to the date and time edit boxes to set these options.

If you continue to press the Tab key, you will find the reminder sound button which will let you change the sound for this task only.

If you are going to change the sound for this task, it is a good idea to create a sounds folder in My Music and store any sounds you might want to use there.

Setting the reminder sound for this task doesn't change the default sound. For other tasks

Just as with appointments, alt + H, G will let you choose a category for the task.

Alt + H, C is supposed to let you include Comments for this task. I tried this several times with the result being that the task was closed with no comment. I tried this with focus in and out of the Notes area.

Alt + H, B will let you Assign the task to other people. Just as with a Calendar item, when you choose this option the To field appears and you can send the task to someone else...which is quite handy on a Monday morning or Friday afternoon!

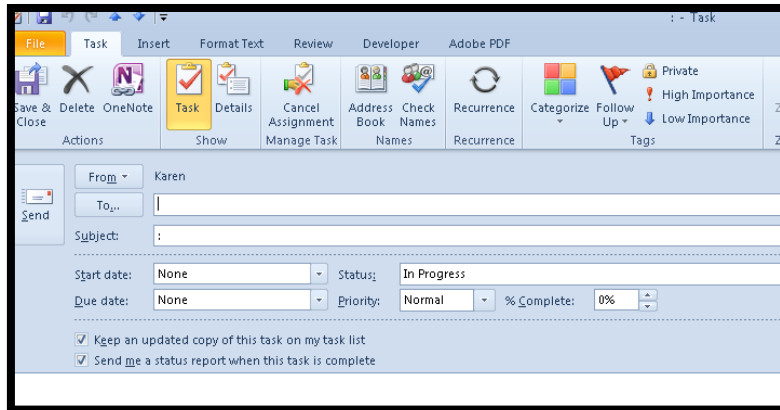


Figure 97 Other people invited to help with a task.

Alt + H, E will let you set this task as a Recurring Task. This opens a dialog of options.

By default your focus is in the task recurrence list of radio buttons. The options are daily, weekly, monthly or yearly.

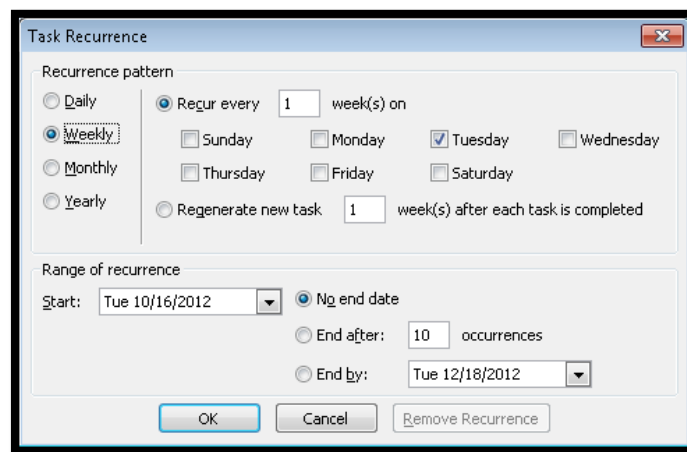


Figure 98 Recurring Task dialog.

Press the Tab key to move to the Recur every section of the dialog. This lets you further customize the frequency of the task. You can also choose to identify a new recurring task once the initial task is complete.

Within the Recurring Event dialog you can use the same strategy for setting recurring tasks that you do for recurring appointments.

Now that we have our friends and co-workers involved in our task, let's look at the details we might want to track and gather information on.

Task Details

Each task has the ability to look at details associated with that task. To switch to the details view of the task press Alt + H, A, letter I for Home Ribbon, Details.

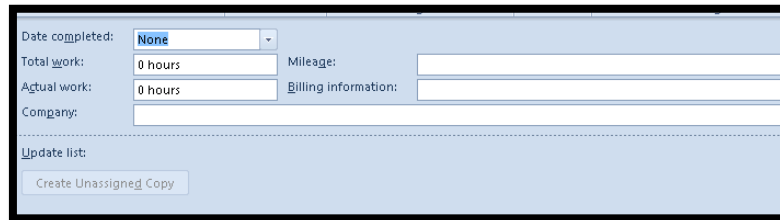
The image shows a screenshot of a software interface for task details. It features several input fields: 'Date completed' with a dropdown menu showing 'None', 'Total work' with a text box containing '0 hours', 'Actual work' with a text box containing '0 hours', 'Mileage' with an empty text box, 'Billing information' with an empty text box, and 'Company' with an empty text box. Below these fields is an 'Update list' button and a 'Create Unassigned Copy' button.

Figure 99 Details view of a task.

When you first enter the Details tabbed pane, your focus is in the edit box where you can enter the date the task was completed. This information is recorded on the day you choose Completed from the Status list box.

Press Alt +W to assign the total work hours to the project. This can be done either using the Up or Down Arrow keys or by typing in a value.

Pressing Alt + C will let you assign an actual work value in hours.

Pressing Alt + G will let you assign mileage to the task.

Alt + B will let you assign billing information to the task.

Pressing Alt + P will let you list companies involved in the task.

Pressing Alt + U will update the list and when you have details or are able to update the list, you will have access to Create Unassigned Copy by pressing Alt + D.

Press Alt + S to save and close the task once you've finished entering all the necessary information.

Completing Tasks

How do we know if a task is complete? Can we move through the list of our tasks, and assuming we've updated the progress, find out which ones we've completed?

Once you press Ctrl + 4 to open the list of Tasks:

Press Alt + W for the View Ribbon and then press Tab once or press Alt + V, C, V for View Ribbon, Change View.

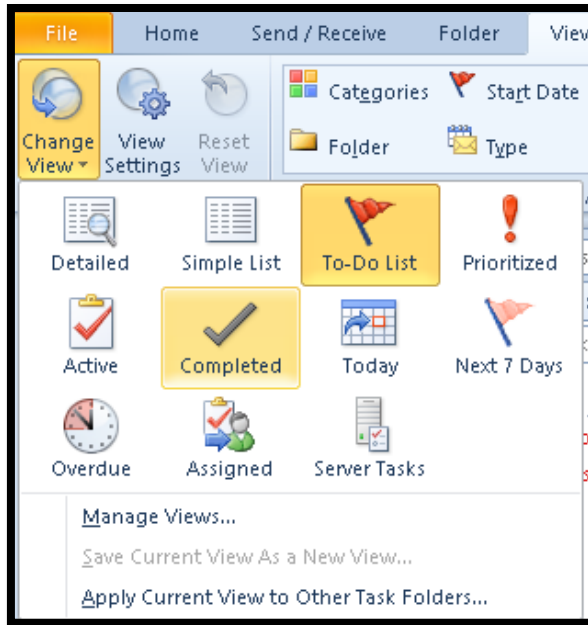


Figure 100 Change View in Outlook Task list.

Press the Left, Right, Up and Down Arrow until you hear the word “complete” or you can click on the large check mark icon in the Gallery. Press Enter on “Complete” and your Tasks are arranged by the order in which they were completed. Until you hear Complete.

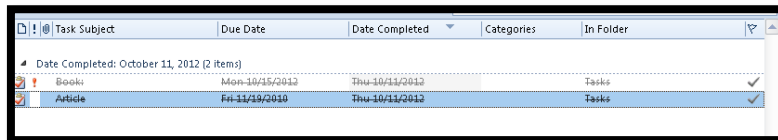


Figure 101 Completed Tasks listed from most recently completed.

The only Tasks displayed are ones that are completed. Tasks at the top of the list are the most recently completed Tasks with tasks completed months ago being at the bottom of the list.

To return to active Tasks press Alt + V, C, V for View, Current View again and this time choose Active. This shows you all currently active Tasks.

You do have other choices such as Server Tasks, Overdue Tasks, show by Importance and so forth. Take some time to explore the various ways available of filtering Tasks so that you have a better idea of what needs to be done.

Notes

When you create a note, you are creating a kind of sticky note as a quick reminder of something. Press Ctrl + 5 to go to the Notes area of Outlook. Then press Ctrl + N to start a new Note. Your focus is in the note and you can begin typing. Once you've created your Note, press Escape to close it.

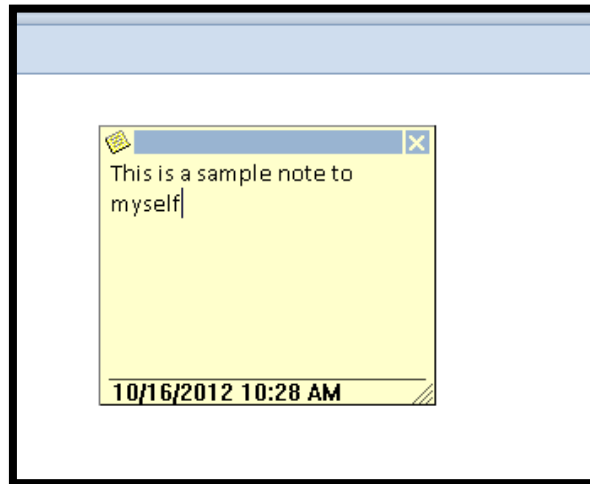


Figure 102 Note open with text entered.

You can press Ctrl + shift + N anywhere in Outlook to create a new Note. A small Window opens, looking much like those sticky notes you find around someone's monitor, on print documents or stuck on a fridge or wall. Simply type in the information you want and press the Escape key.

By default, Notes are displayed as icons. You can use the Left, Right, Up or Down Arrows to move through Notes depending on how many you have. If you are using the JAWS screen reader the entire contents of the Note is read as you move to it.

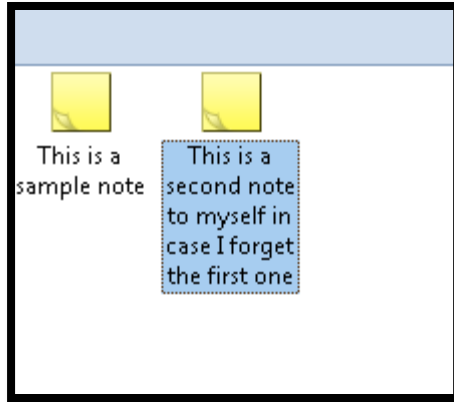


Figure 103 Two Notes in Icon view.

To have your Notes displayed in a list or by Notes created in the past 7 days, press Alt + V, C, V for View Ribbon, Change View and choose either Icon, List or Last 7 days.

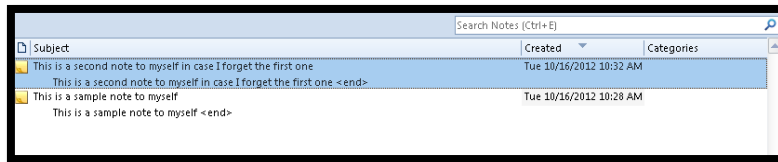


Figure 104 Notes displayed as a list rather than as icons.

If you press Enter on a Note it opens and you can press Escape once you've finished reading or editing it. However if the Note is short, a screen reader should be able to read it without opening it.

If you press Ctrl + Shift + N while in another Outlook tool by mistake, pressing the Escape key without entering any text will simply erase the note and it won't appear in your list of notes. You can also copy and paste information to and from notes.

Notes Options

You can set options for Notes if you can't work with the default Notes colour.

To change the colour and font size of a Note press Alt + F, T for File/Backstage area, Outlook Options which opens a dialog. Press the letter N to move to the Notes and Journal category. Press Tab to move into the Notes settings. The first one is the colour of the Notes.

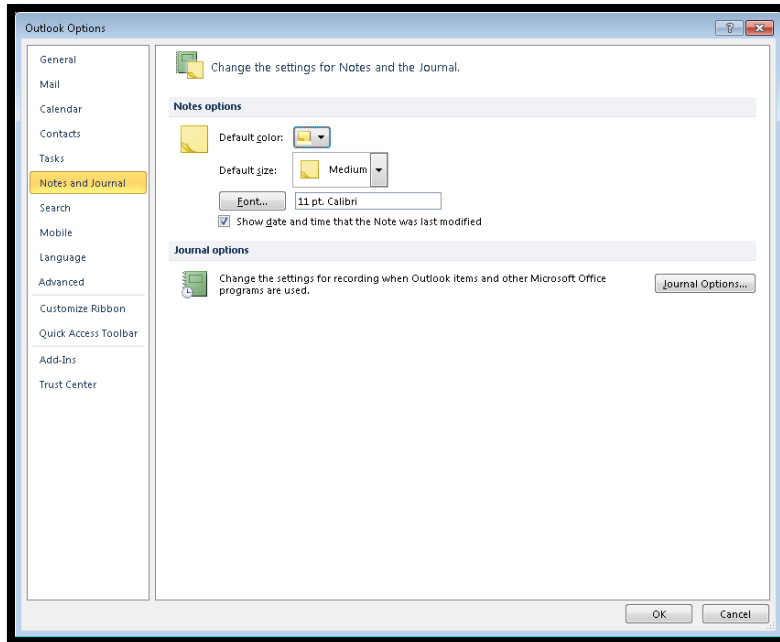


Figure 105 Notes settings in the Outlook Options dialog.

The first option is to choose a colour. This is where your focus is when you enter Notes settings. Press the Spacebar to open the colour palette. There are only a few. In the following sample I chose the blue colour. JAWS is not reading any of these colours. The default colour for Notes is Yellow. If you are in the Notes settings and want to return to the Default Colour settings press Alt + C.

If you change the colour of a Note the changes will take effect when you create the next Note.



Figure 106 Note with the new colour and font size.

The next item you can change is the size of the Note. The default is medium. The other choices are small or large. The keyboard command, if you aren't tabbing through these options is Alt + S.

The next thing you can change is the font used to write the Notes. The keyboard command to activate the Font button is Alt + F while in the Notes settings. The default font style is Calibri and the default font size is 11 point.

The final setting is one that inserts the date and time the Note was created at the bottom of the Note. This is checked by default. The keyboard command to move to it and either check or uncheck it is Alt + D while in the Notes settings.

The Notes view is refreshed to show the last Note you created first in the list or series of icons when you move away from Notes and then back to it. For example if you press Ctrl + number 1 to look at your e-mail then Ctrl + 5 to go back to Notes, they will be rearranged beginning with the last Note you created.

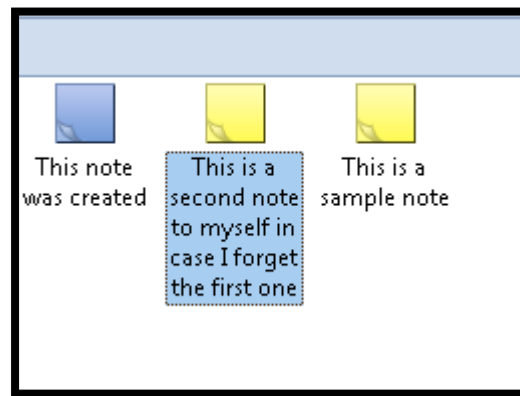


Figure 107 List of Notes in the Notes tool of Outlook.

In the preceding image of a series of Notes icons, the blue one is slightly larger than the yellow ones.

To delete a Note select it and press the Delete key. There is no Undo function for this action.

Journal

The Outlook Journal is not the same as the Windows Journal (which comes with the Windows operating system when used on a tablet computer like the Motion Computing tablet). Windows Journal is a note pad that lets you enter text as handwriting and either maintains the handwritten notes or converts them to text.

The Outlook Journal is an alternate way to track information from Contacts.

Note: For those of us using screen readers, the Journal isn't accessible. This overview has been provided to give you a basic knowledge of the tool. You can use the Activities tabbed pane for a contact card to track e-mail messages and appointments for that contact.

To use the Outlook Journal, press Ctrl + 8. The first time you use the Journal, you'll get a message telling you that the journal can track documents related to contacts. It also tells you that the best way to track e-mail from contacts is to use the activities tabbed pane of the Contacts card. You have the choice to not show you this dialog again. Select yes if you want to activate the Outlook Journal.

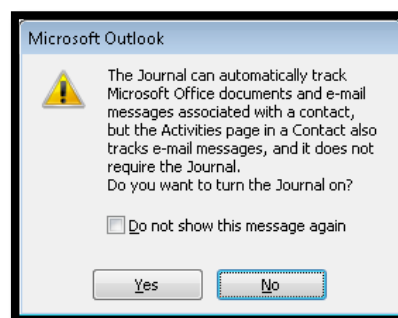


Figure 108 Do you want to use Journal message.

You are taken to a Journal Options dialog. This lets you set up which files are going to be tracked. By default you are in the “Automatically record these items” area of the dialog. This is a list of check boxes that let you choose which items are recorded in the Outlook Journal.

You can also access Journal options by going to the Outlook Options dialog and choosing the Notes and Journal category. The section and button after the Notes settings is the “Journal” button which opens the Journal settings dialog. While in the Notes and Journal category press Alt + J to automatically move to and open the Journal Options dialog.

You automatically record:

- E-mail
- Meeting Cancellations
- Meeting requests
- Meeting response
- Task request
- Task Response

After you’ve chosen the items to automatically record, press the tab key to move to the “For these Contacts” which is another list of checkboxes that let you customize the information you record for specific contacts.

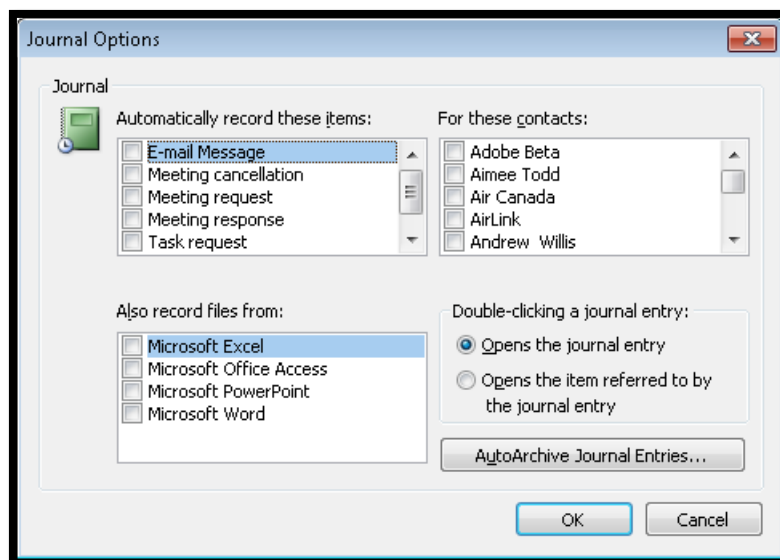


Figure 109 Journal Options dialog.

Pressing the Tab key again moves you to the “Journal also record files from” area which lists the Microsoft Office applications, word, Excel, PowerPoint and Access. This is a list of checkboxes that you can choose from.

Pressing Alt + the letter O will move to and check the radio button for “Open the Journal entry,” [the default] or you can press Alt + P to “Open the item referred to by the journal entry.”

The last control in this dialog is the “Archive Journal entries’ button.

Once you’ve finished making any changes to the Journal, Tab to and activate the OK button. If you are just exploring the options, press the Escape key or activate the Cancel button.

Journal Properties

If you press Enter on Archive Journal entries,” a tabbed pane dialog opens and your focus is in the Archive tabbed pane and the radio button to “Archive items in this folder using the default settings.” The other choice is not to archive journal items.

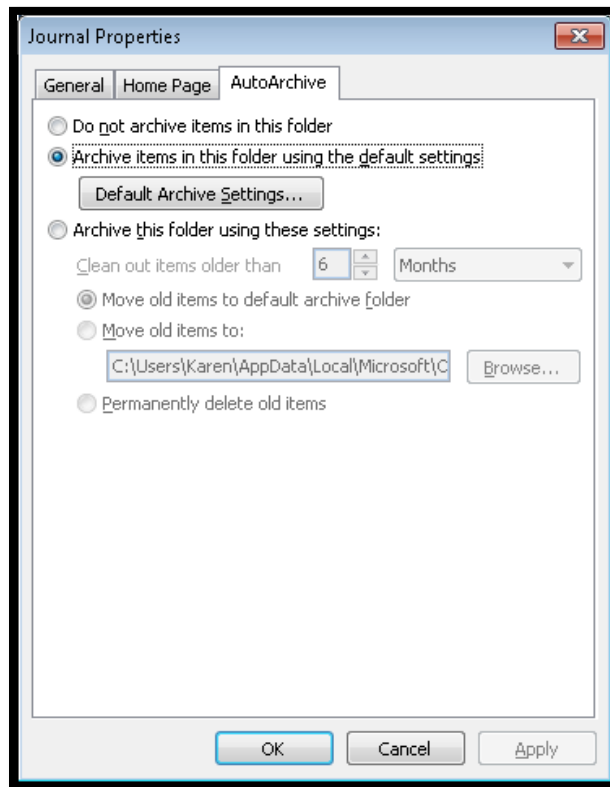


Figure 110 Archive Journal Entries dialog.

This is an overview of the Journal properties. Please explore these properties when you have some time.

- The archive tabbed pane lets you identify a time frame to archive information in the Journal and send it to a specific folder.
- The Administration tabbed pane lets you decide display Journal entries in a Normal view, or grouped by From, Subject conversation topic, or unread by conversation.
- The Forms tabbed pane lets you manage forms associated with the Journal folder.
- The General tabbed pane identifies the name of the Journal folder [Journal] and lets you automatically create Microsoft Exchange views if you are using this tool.
- The Home Page tabbed pane lets you choose a home page for the Journal folder.

If you modify any of the Journal properties, press alt + A to Apply the changes, then Tab to the Ok button and press enter.

Once you've set up the basic settings for the Outlook Journal, press the Tab key to the OK button and press Enter.

General Outlook Options

There are several elements of Outlook you can modify to work more effectively with the application. This is an overview of some of the more popular settings you can adjust.

To open the Outlook Options dialog press Alt + F, T for File/Backstage area, Outlook Options.

The categories are:

- General.
- Mail.
- Calendar.
- Contacts
- Tasks.
- Notes and Journal
- Search.
- Mobile
- Language.
- Advanced.
- Customize Ribbon.
- Quick Access Toolbar.
- Add-ins.
- Trust Centre.

General Options

General settings in Outlook include whether you want the “mini-toolbar” to show at the top of a context menu, whether you want to use live preview, whether you want the overall colour of Office application Ribbons and “fishbowl” to be blue, silver or black, what your name is and whether you want Outlook to be your default e-mail client/program.

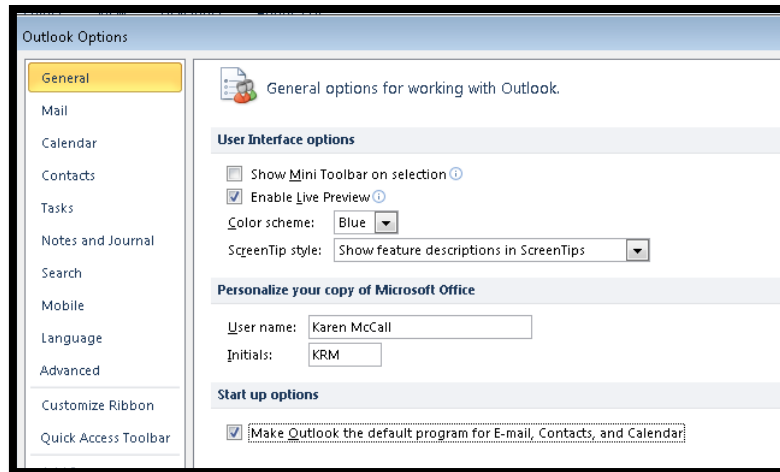


Figure 111 General settings in the Outlook Options dialog.

Mail Options

There are many settings you can modify or explore in Outlook to ensure that your mail is handled the way you want.

To get to the Mail category in the Outlook Options dialog, press Alt + F, T, M for File/Backstage area, Outlook Options, Mail.

Once you are in the Mail category press Alt + E to move to the Editor Options button and press Enter on it to view some of the proofing and formatting settings you can change.

Once the Editor Options button is activated another dialog opens with two categories: Proofing and Formatting. Navigate the Editor Options dialog in the same way you navigate the Outlook Options dialog. The categories are on the right and the settings on the left. Tab into a category of settings to explore them.

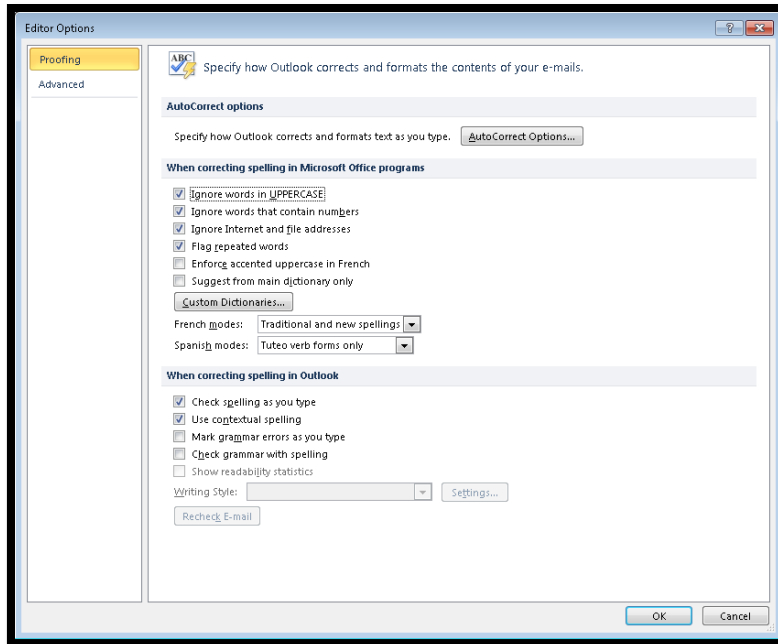


Figure 112 Mail Editor Options dialog.

To modify or explore some of the frequently modified settings, press:

- Alt + E to move to the Editor Options. Press Enter to open the Editor Options dialog.
- Alt + C to choose your mail format. This is a drop down list.
- Alt + S to move to the Spelling Options button. Press Enter to open the spelling Options dialog.
- Alt + A to Always check spelling before sending an e-mail message. This is a check box so pressing this keyboard command will move to and either check or uncheck this setting.
- Alt + letter I to Ignore spelling in original messages when replying to or forwarding messages. This is a check box so pressing this keyboard command will move to and either check or uncheck this setting.
- Alt + N to move to the Signatures button. Press enter to open the Signatures dialog.
- Alt + F to move to the Stationary and Fonts button. Press Enter to open the Stationary and Fonts dialog.
- Alt + R to move to the Reading Pane button. This is where you can show or hide the Preview of the message header information in the list of messages as well. Press Enter to open the Reading Pane Options dialog.

Other areas of the Mail settings are to identify mail arrival notification, conversation clean up, replies and forwarding, saving messages, sending messages, tracking messages, mail format (including the use of cascading style sheets in a message), and the ever popular “other” settings. Other includes things like showing a Paste button, shading message headers and not expanding conversations automatically. Take some time to explore the various mail settings for Outlook.

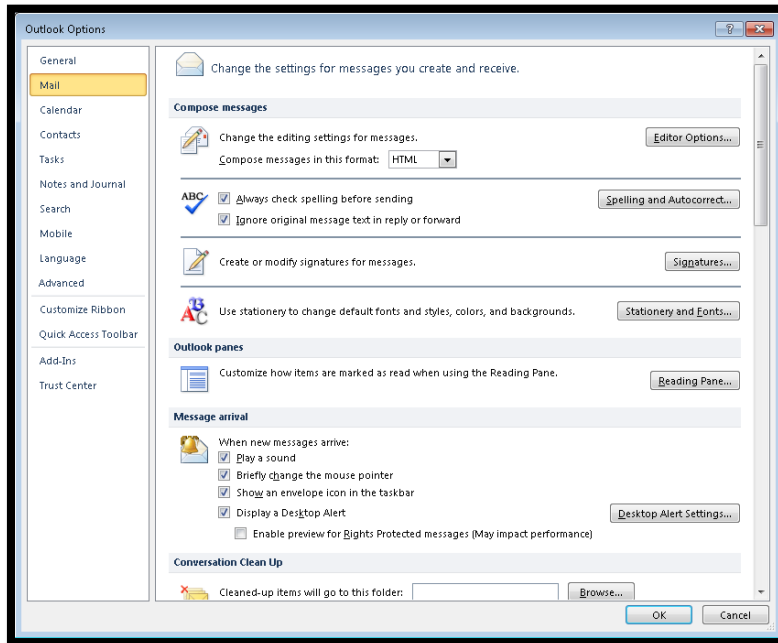


Figure 113 Mail settings in the Outlook Options dialog.

Calendar Options

We’ve looked at some of the Calendar options in the chapter on Calendar. Here are some of the settings we didn’t cover in that chapter.

To get to the Calendar category in the Outlook Options dialog, press Alt + F, T, C for File/Backstage area, Outlook Options, Calendar.

To set a default time zone press Alt + T while in the Calendar settings. You can press Alt + L to give the time zone a label.

To set a second time zone press Alt + D which then reveals another Label and Time zone edit areas. You can Tab to them or press Alt + L to create a label for the time zone and Alt + T to choose the time zone.

Press Alt + P to Show calendar details in the ToolTip.

Press Alt + letter O to Show calendar details in the scheduling grid.

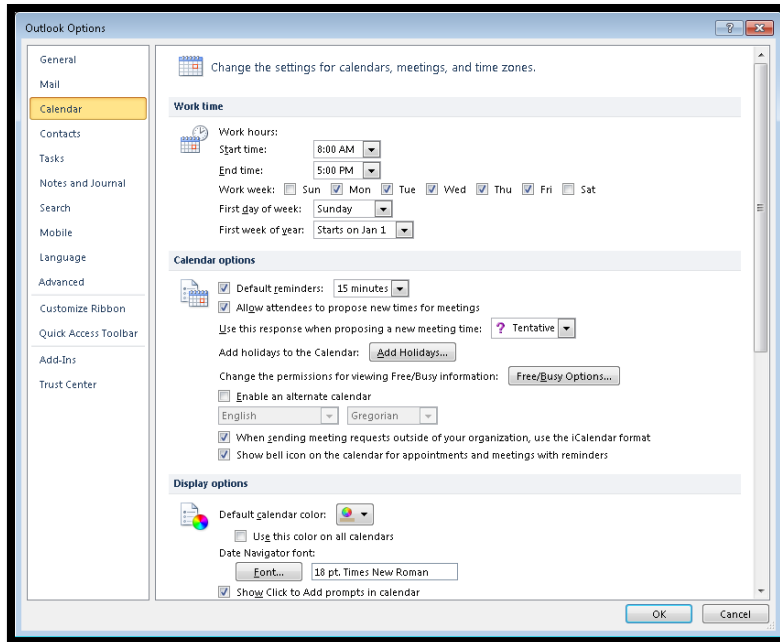


Figure 114 Calendar settings in the Outlook Options dialog.

The last setting in the Calendar options is a “Resource Scheduling.” This lets you work with conference rooms and booking of other resources that might be needed for a meeting.

The keyboard command to move to the Resource scheduling is Alt + S. Once you are on this button, press Enter to open the Resource Scheduling dialog. This initially opens a dialog where you can give participants permission to access the resources for meetings.

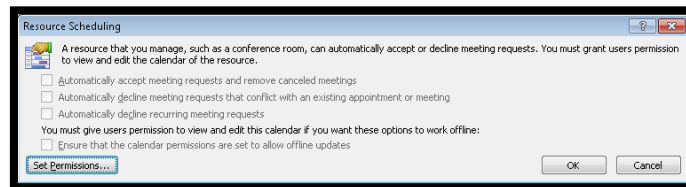


Figure 115 Settings for Resource Scheduling.

Contacts Options

As with the Calendar options, we've taken a look at some of the Contact settings in the chapter on Contacts. This topic will give you some of the ones not covered in the Contacts chapter and some settings to explore on your own.

To get to the Contacts category in the Outlook Options dialog, press Alt + F, T, C for File/Backstage area, Outlook Options, Contacts.

Press Alt + N to choose a default way of displaying someone's Full Name.

Press Alt + F to choose a default way to File names of Contacts.

Press Alt + C to check a check box to Check for duplicates when creating new Contacts. This is a check box so using this keyboard command instead of the Tab key will move you to the check box and either check or uncheck it.

Pressing Alt + S will Show Contacts linked to the current item. This is not checked by default.

Pressing Alt + U to Automatically create an Outlook Contact for recipients not in an Outlook Address Book. This is checked by default.

There are a few more settings that you can explore in the Contacts settings by using the Tab key to move around the settings.

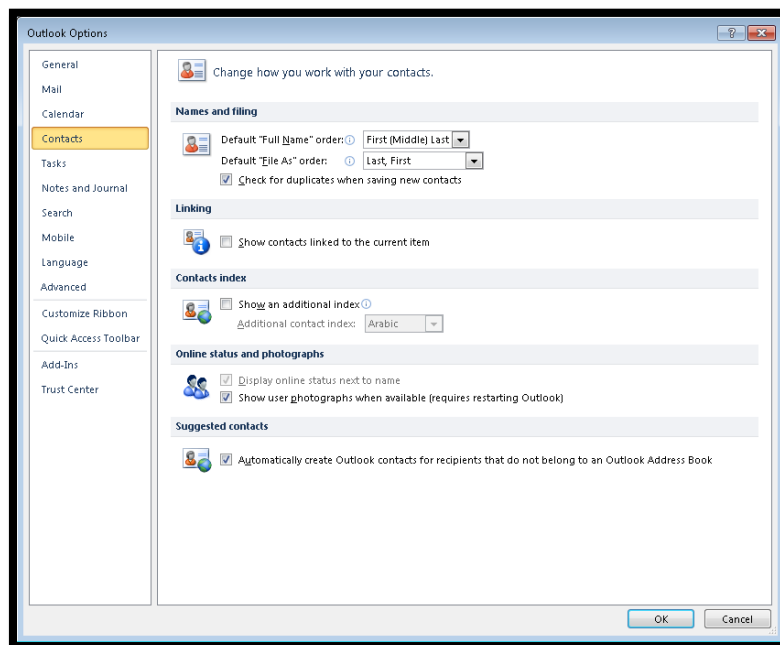


Figure 116 Contacts settings in Outlook Options dialog.

Tasks Options

We talked about Tasks in the chapter on Tasks but didn't cover any of the default settings. For those of you who need more control over how Tasks are handled, this topic will provide an overview.

To get to the Tasks category in the Outlook Options dialog, press Alt + F, T, T for File/Backstage area, Outlook Options, Tasks.

Press Alt + E to check a check box to Set a reminder for tasks with due dates.

Press Alt + R to set the reminder time for Tasks. The default is 8 AM.

Press Alt + K to Keep copies of Tasks assigned to me by other people.

Press Alt + S to Send a report when I complete an assigned Task.

Press Alt + letter O to choose an Overdue Task colour.

Press Alt + C to choose a Completed Task colour.

Press Alt + D to change the Total working hours per day. The default is 8.

Press Alt + W to change the total working hours per week. The default is 40.

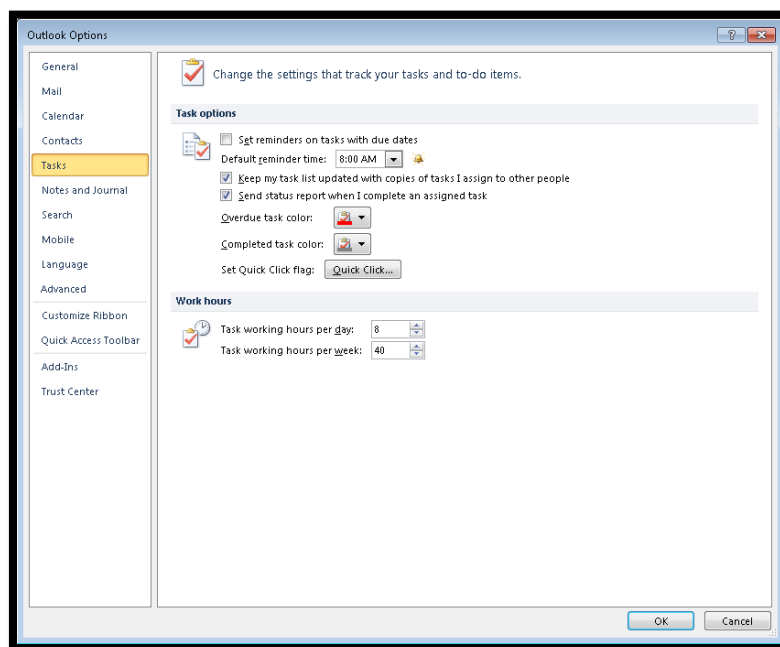


Figure 117 Tasks settings in Outlook Options dialog.

Notes and Journal Options

There aren't a lot of settings in the Notes and Journal settings and we've covered all of them in the chapters on Notes and Journal respectively.

To get to the Notes and Journal category in the Outlook Options dialog, press Alt + F, T, N for File/Backstage area, Outlook Options, Notes and Journal.

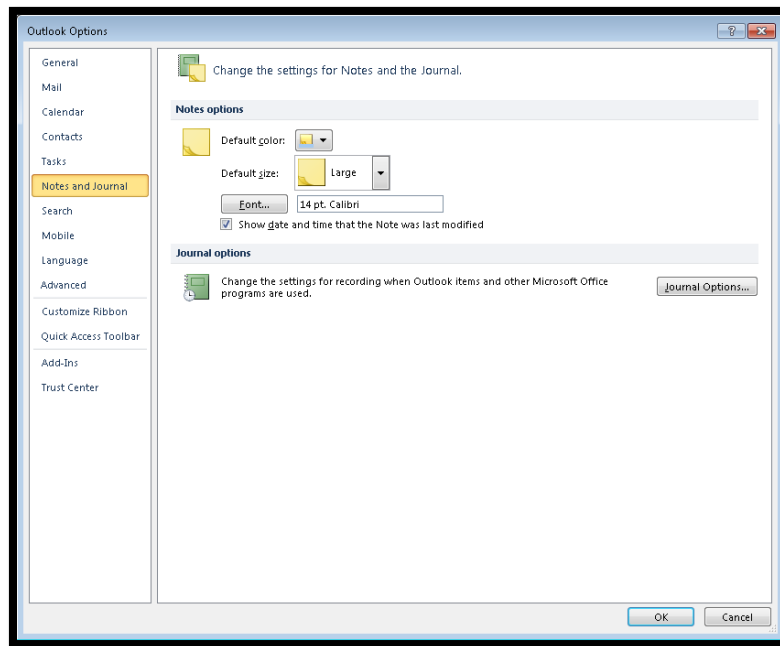


Figure 118 Notes and Journal settings in Outlook Options dialog.

Mobile Options

We haven't looked at any of the settings related to making our Outlook tools mobile or accessible in a mobile environment.

To get to the Mobile category in the Outlook Options dialog, press Alt + F, T, M for File/Backstage area, Outlook Options, Mobile.

Press Alt + C to Send a summary of your Calendar to a mobile device. This takes you to the Calendar Summary Settings button. Press Enter to open the dialog where you can set up an IM or Instant Messaging account. If you are using a tool like Windows Messenger or any other IM client, you should be able to configure the items in the Mobile settings to your IM account.

Press Alt + D to move to the Mobile Reminder Settings. When you initially press Enter on this button you will get a dialog prompting you to set up an IM or Instant messaging account.

Pressing Alt + F will take you to the Configure Forwarding Settings. Once you press Enter on this button for the first time you will be prompted to set up an IM or Instant Messaging account.

Pressing Alt + letter O will take you to the Mobile Options button. Once you set up an IM or Instant Messaging account you will be able to access the options.

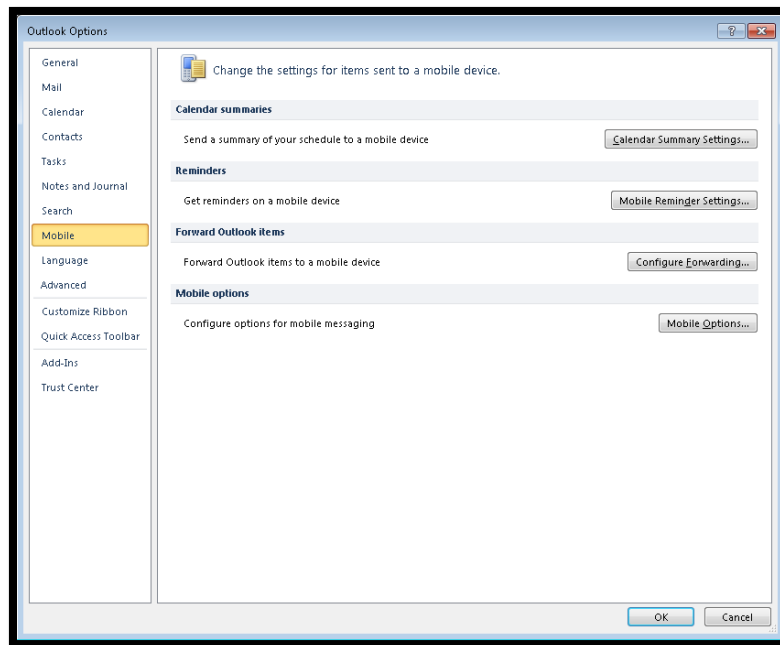


Figure 119 Mobile settings in the Outlook Options dialog.

Advanced Options

As with other Microsoft applications the Advanced category has everything else in it. Anything that hasn't got a logical category home gets put in the Advanced category.

To get to the Advanced category in the Outlook Options dialog, press Alt + F, T, A for File/Backstage area, Outlook Options, Advanced.

When you press the Tab key to move into the Advanced settings, the first item you land on is the Navigation Pane button. If you lose focus and want to go back to it, the keyboard command is Alt + N once focus is in the Advanced category.

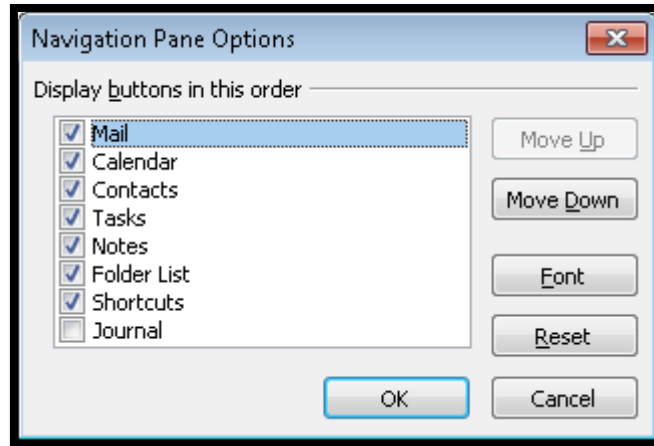


Figure 120 Navigation Pane settings in Advanced category.

These settings are for the order in which the buttons appear in the Navigation Pane. If you are using screen magnification or no adaptive technology, this might be of interest. However, for those of us using the keyboard to move to Mail, to Calendar, to Contacts, or other tools, this is somewhere we don't need to go.

The next settings are for the Reading Pane and the To do Bar. The keyboard commands are Alt + R and Alt + T respectively.

The Reading Pane options are similar to those we've already looked at including marking messages as read once you look at them in the Reading Pane.

The To Do Bar settings let you swap out the Date Navigator which might not be accessible to some adaptive technology and instead show a list of appointments in the top half of the To Do Bar.

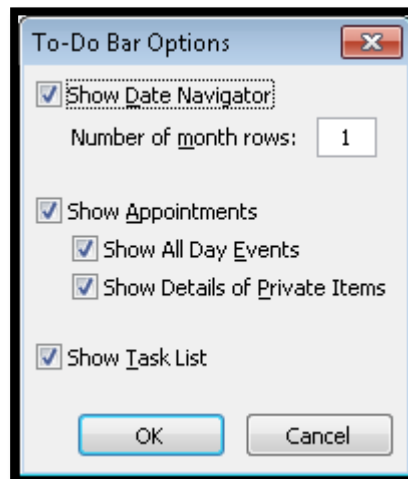


Figure 121 To Do Bar settings in the Advanced category.

If you are going to use the To Do Bar, categorizing your appointments lets them show up better and you can visually identify business from recreational appointments like going to the dentist.

Pressing Alt + B while in the Advanced settings will take you to the Browse button where you can choose the folder Outlook starts with. Although you can do this in the Outlook Today screen, not all adaptive technology works well with the Today Screen. Using the Advanced category in the Outlook Options dialog is an accessible alternative. Once you press Spacebar to activate the button you will have a list of mail folders including ones you have created yourself. Use first character navigation to locate the Inbox or any other folder you want Outlook to start with then Tab to and activate the OK button. You are returned to the Advanced settings in the Outlook Options dialog.

Pressing Alt + E will let you Empty the deleted items folder when you exit Outlook. This is a check box. Pressing this keyboard command will either check or uncheck it. You can press the Tab key to move to any of the items and then use the Spacebar to check or uncheck items if this works better for you.

Pressing Alt + A takes you to the AutoArchive button. Pressing Spacebar will open a dialog that lets you set the timeframe to auto archive your bulky mail folders.

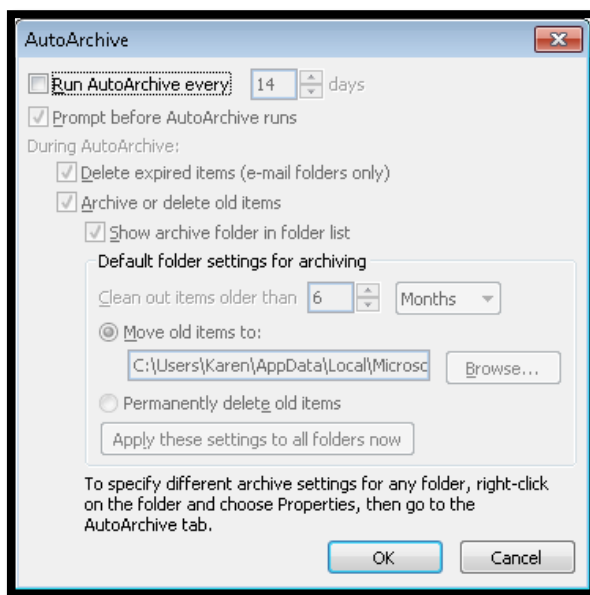


Figure 122 Archive settings dialog from the Advanced category.

Auto archiving bloated mail folders lets Outlook run faster and puts the older content into an archive folder at the bottom of the Navigation Pane where you can easily access it. I also recommend deleting any unnecessary mail messages or using Adobe Acrobat to archive folders for projects and courses so that your mail messages including attachments are in a PDF document that can easily be tagged and then the folder can be cleaned out in Outlook ready for the next project or course.

When in the advanced category, press Alt + letter I to Show reminders which is checked by default and Alt + P to Play a reminder sound. The Play reminder sound is checked by default which lets you then press Tab once to see the reminder sound filename and Tab again to Browse for another sound.

The Show reminders check box is one of a couple of keyboard commands that are assigned to the Alt + letter I keyboard command. This means that once you land on this setting you can use the Spacebar to check or uncheck this setting.

The Export button has no keyboard command. This is the same tool as you have from the File/Backstage area that lets you create a backup of your Outlook content.

Other settings in the Advanced category include those for RSS Feed updating, dial-up connections, international settings and “other.”

Other includes the setting to Prompt before permanently deleting items from the Deleted folder. The keyboard command to move to this check box is Alt + B. You will land on two Browse buttons before you land on the check box. Typically I check this if it isn't checked so that mentally I have a note that I am about to clear the Deleted folder. I also have the check box to empty the Deleted folder when exiting Outlook checked.

As a reminder, also in the Advanced category is the setting to empty the Deleted items when exiting Outlook. The keyboard command to move to this setting is Alt + E. This is not check by default. Again, it is a good idea to empty the deleted items folder to keep Outlook from getting too bloated.

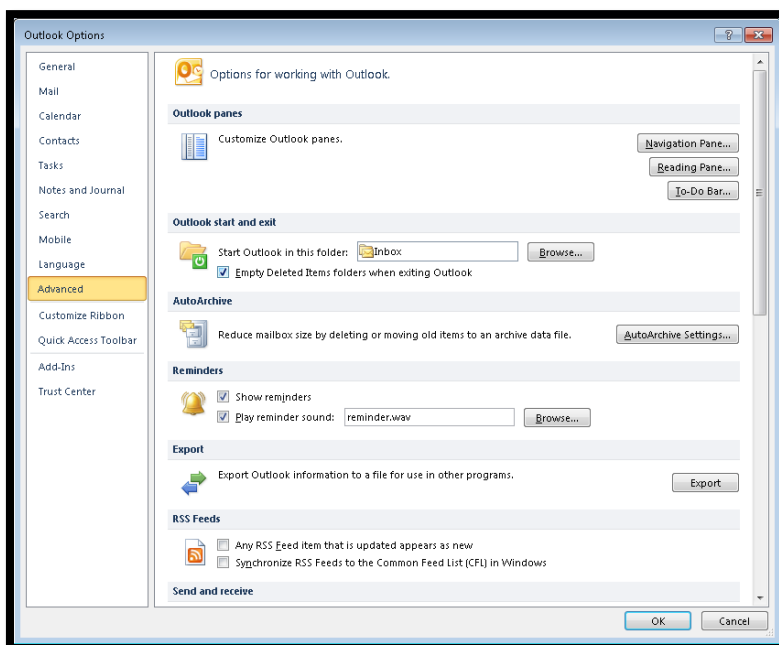


Figure 123 Advanced Settings in the Outlook Options dialog.

References

The following are a combination of videos with no text content and text content with no video. All are from the Microsoft website.

Outlook 2010 Keyboard Shortcuts: E-mail (video)

<http://office.microsoft.com/en-us/outlook-help/outlook-2010-keyboard-shortcuts-i-email-RZ102746903.aspx?CTT=1>

Outlook 2010 Keyboard Shortcuts: Calendar, Contacts and Tasks (video)

<http://office.microsoft.com/en-us/outlook-help/outlook-2010-keyboard-shortcuts-ii-calendar-contacts-tasks-RZ102746902.aspx?CTT=1>

Keyboard Shortcuts for Outlook (text)

<http://office.microsoft.com/en-us/outlook-help/keyboard-shortcuts-for-outlook-HP001230396.aspx>

Use the Keyboard to Work in Outlook (text)

<http://office.microsoft.com/en-us/outlook-help/use-the-keyboard-to-work-in-outlook-RZ001039329.aspx?CTT=1>

Keyboard Shortcuts for the Euro Currency Symbol (text)

<http://office.microsoft.com/en-us/mac-word-help/keyboard-shortcuts-for-the-euro-currency-symbol-HA102927364.aspx?CTT=1>