Microsoft Outlook 2010 – Level 1

6 – Flagging messages

CORPORATE LEARNING & DEVELOPMENT

FLAGGING MESSAGES

INFOCUS

You can **flag** messages, either those listed in your Mail folders or new messages that you are creating and sending to others. By flagging a message, you are providing a visual reminder that either you or the recipient must follow up or action a message in some way.

You can also optionally choose to have Outlook both visually and aurally remind you or someone else to action a message by adding a **reminder**.

In this booklet you will:

- ✓ gain an understanding of flags and reminders
- ✓ learn how to flag messages in message lists
- ✓ learn how to send a message with a flag
- ✓ learn how to add a quick click flag
- ✓ learn how to add a reminder to your messages
- ✓ learn how to remove a flag from a message

ABOUT FLAGS AND REMINDERS

Applying a **flag** to a message or contact provides a *visual* reminder to help you to follow up on an item in some way. For example, you could flag a contact to remind you to return their telephone call.

If you want Outlook to prompt you to take action on a flagged item by a certain time – both *visually* with a dialog box and *aurally* with an alarm – you can add a **reminder** to the item.

Follow Up Flags

When you add a flag to a message, the message will appear with a flag indicator 🚩 in your email views, such as the Inbox, while flags for contacts will appear in your contact views. The flag will be red or a shade of pink, depending on the flag date that you choose – for example, a **Daily** flag will appear with a red flag indicator. The flagged item will also appear in your **To-Do bar**, the **Daily Task List** in Calendar and your tasks views.

As well as flagging messages for yourself, you can flag messages for other people. In this case, a flagged message will appear only in the recipient's message list with the flag indicator 🚩. It will not appear in their **To-Do bar**, **Daily Task List** in Calendar or **Task List** in Tasks. However, they can add the flagged message to their **To-Do bar**, if desired, simply by clicking on the flag indicator in the **Flag Status** column. The 🚩 indicator will then be replaced by the normal flag indicator 🚩.

How Flag Dates Work

Outlook provides several default flags with dates, such as **Today**, **This Week**, **Next Week** and so on. As well as the default dates, you can also specify your own custom dates for a flag or you can choose a flag without a date. The flag options are listed in the **Follow Up** drop-down menu.

When you flag a message, Outlook inserts the follow up information in the InfoBar in the message header. This includes information such as the flag text, Start By, Due By, Recipients received information, and so on. The following table describes how Outlook calculates the Start By and Due By dates. It also shows when Outlook will issue a **reminder** if you choose to add a reminder to the flagged item using the default settings.

Flag	Start By	Due By	Reminder
Today	Current date	Current date	One hour before the end time of today's work day
Tomorrow	Current date plus one day	Current date plus one day	Start time of current day plus one work day
This Week	Current date plus two days, but no later than the last work day of this week	Last work day of this week	Start time of current day plus two work days
Next Week	First work day of next week	Last work day of next week	Start time of the first work day of next week
No Date	No date	No date	Current date
Custom	Current date is displayed – choose a custom date if desired	Current date is displayed – choose a custom date if desired	Current date is displayed – choose a custom date if desired

How Reminders Work

At the allotted **Reminder** time – the default times are shown in the table above – Outlook will emit a small bell sound and display the **Reminder** dialog box. The flagged item (plus other items which have had reminders issued) will be listed in the dialog box, showing the **Subject** and **Due in** time. From this dialog box you can **[Dismiss]** the item (or all items), **[Open]** the item or click on **[Snooze]** to get Outlook to remind you again after a specified period of time.

FLAGGING MESSAGES IN A MESSAGE LIST

You can flag a message to provide yourself with a visual reminder that the message needs some form of attention, such as reviewing an attached document. When you add a flag to a message, the message will appear in the message list with a highlighted flag indicator 🚩. The flagged message will also appear in the *To-Do bar*, the *Daily Task List* in Calendar and the task list in *Tasks*.

Try This Yourself:

Before starting this exercise you MUST open the file Watsonia_07.pst...

1 Click on *Inbox* and then click on the *Parking* message from *Peter Dawson* to select it

Currently, the flag icon to the right of the message in the message list is not highlighted...

2 Click on *Follow Up* 🚩 in the *Tags* group to display the list of available options
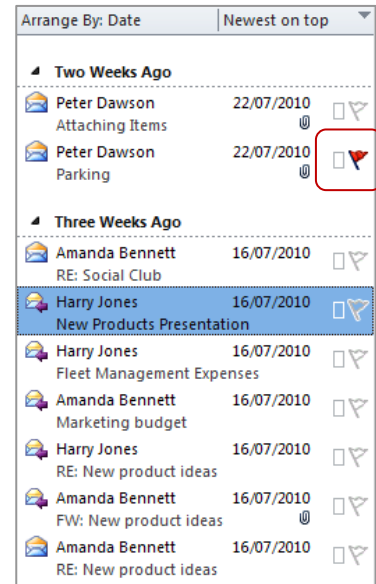
3 Select **Today** and then click on another message

Notice that the flag icon is now red...

4 Double-click on the *Parking* message to open it

Notice the Follow up information in the InfoBar in the message header. Outlook has set the Start and Due by dates to today...

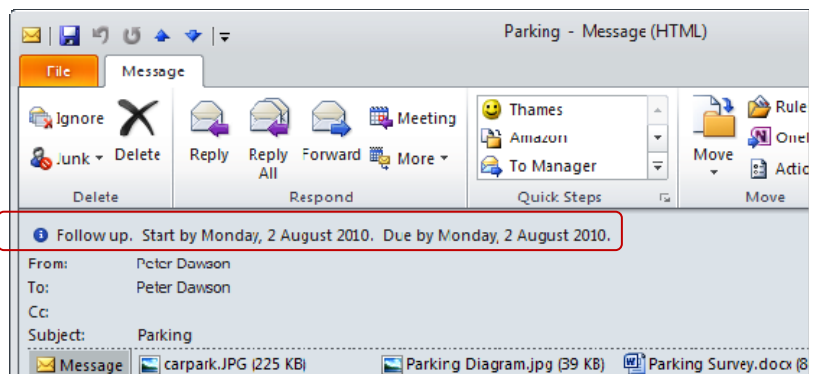**5** Close the message
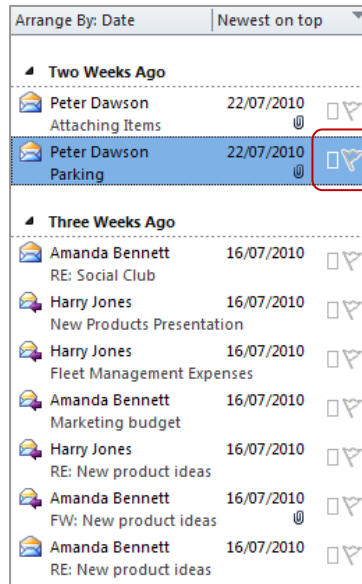
For Your Reference...

To *flag* a *message* in a message list:
1. Click on the message in the message list
2. Click on *Follow Up* 🚩 in the *Tags* group on the *Home* tab
3. Select the desired option

Handy to Know...

- You can add a flag with a custom date to a message. To do this, click on *Follow Up* 🚩 and select **Custom**. Select *Flag to* or type your own text if desired, and select the *Start* and *Due dates*. You can also set a reminder if required by ticking *Reminder* and setting the date and time.

SENDING A MESSAGE WITH A FLAG

If you want to ensure that the recipient of your message replies to it or performs some other action, you can send them a flagged message. The message will appear in their Inbox with a flag indicator. In addition to using the default follow up text *Follow Up*, you can type your own text pertinent to your requirements. All follow up details will appear in the InfoBar at the top of the message.

Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file Watsonia_07.pst…

1 Create a new message addressing it to one of your colleagues

2 Type **Paris Trade Show** in *Subject* and type **Thanks for the plans. Please ring me next week to discuss travel arrangements.** in the message body

3 Click on *Follow Up* in the *Tags* group and select **Custom** to open the *Custom* dialog box

4 Remove the tick from *Flag for Me* and tick *Flag for Recipients*

5 Ensure that *Follow up* is selected in *Flag to*, then type **Please ring**

6 Tick *Reminder*, change the *Reminder* date to Friday of next week, and then click on **[OK]**

Outlook will display the custom text plus the reminder information in the InfoBar…

7 Send the message
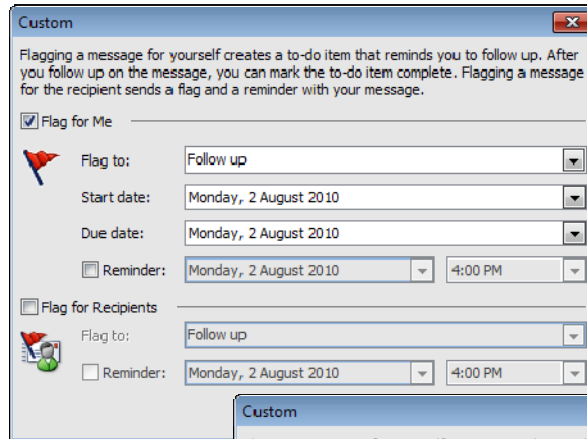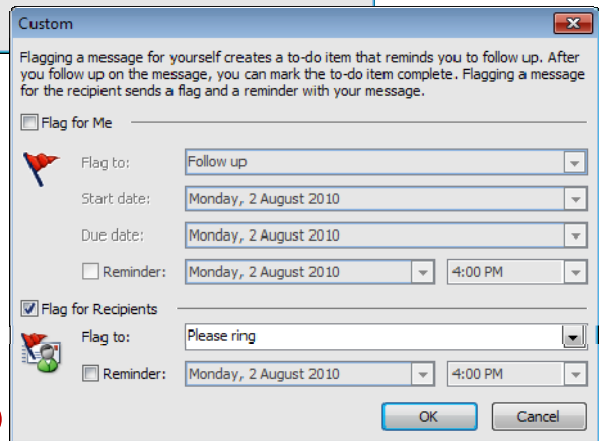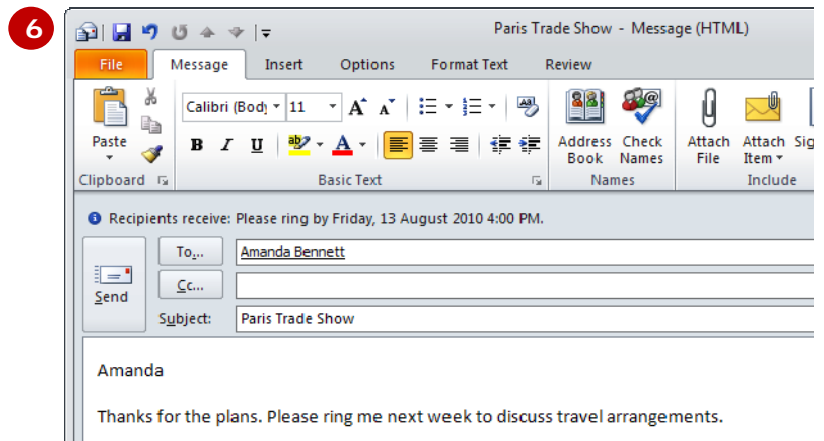
For Your Reference…

To *send* a *flagged message*:
1. Create a new message
2. Click on *Follow Up* in the *Options* group on the *Message* tab
3. Select **Custom**
4. Tick *Flag for Recipients* and set the options

Handy to Know…

- If you want to include a flag in the message for yourself as well as for the recipient, tick *Flag for Me* in the *Custom* dialog box.

- Consider carefully whether or not to include a reminder for the recipient when you send a flagged message. You don't want to annoy them.

ADDING A QUICK CLICK FLAG

You can assign a flag to a message in your message list with a single click. When you click in the *Flag Status* column next to an item, you will select the *Quick Click flag*.

A Quick Click flag is set to *Today* by default but you can easily change it to a different date. You can also assign a Quick Click flag to contacts.

Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file Watsonia_07.pst...

1 Click on the **Marketing budget** message from **Amanda Bennett** to select it

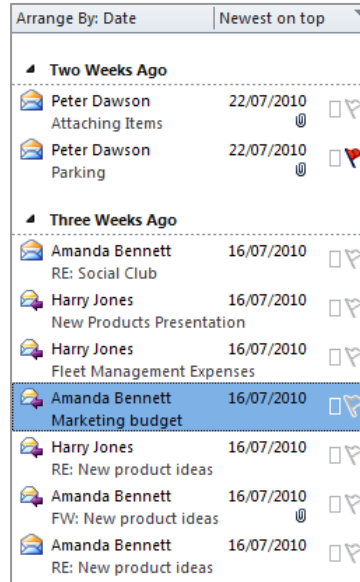*Notice that the flag indicator is not currently highlighted...*

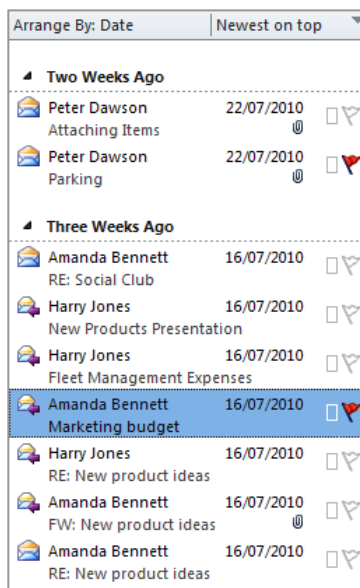**2** Hover over the **Flag Status** column to see what options are available to you

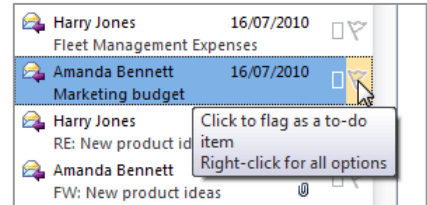**3** Click on the **Flag Status** column to add a Quick Click flag

The flag indicator will now change to red indicating that it is set to today

For Your Reference...

To **add** a **Quick Click flag**:

1. Click on the message in a message list
2. Click in the **Flag Status** column next to the message

Handy to Know...

- To change the default Quick Click flag to a timeframe rather than today, click on **Follow Up** 🏳️, select **Set Quick Click**, change the date as desired and click on **[OK]**. Note that if you change the Quick Click flag, previously flagged messages will not change.

ADDING A REMINDER TO YOUR MESSAGES

Flagged messages appear with a coloured flag indicator in the message lists – this provides a visible reminder to take action. If you want to ensure that you don't forget to action a flagged message, you can add a reminder to the flag so that you are prompted to take action. A bell icon 🔔 will appear in the message in the message list indicating that a reminder has been set.
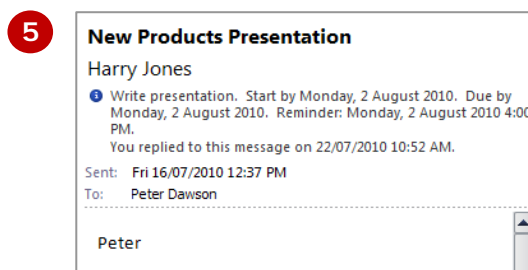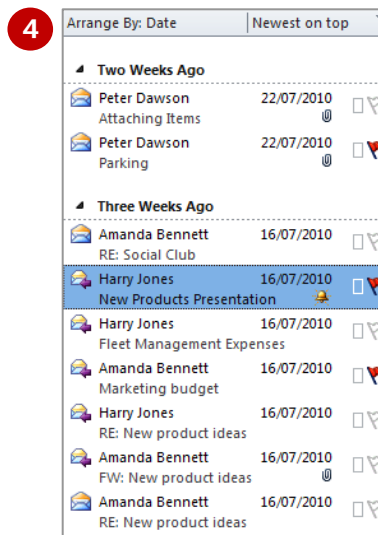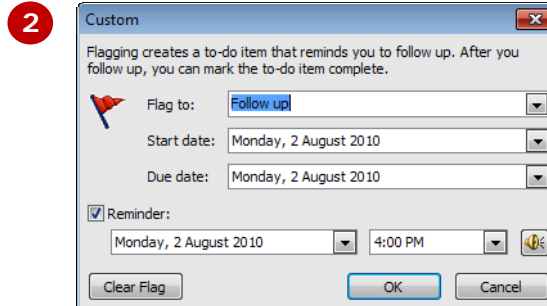
Try This Yourself:

Continue using the previous file with this exercise...

1 Click on the ***New Products Presentation*** message from ***Harry Jones*** to select it

Let's remind ourselves that we must prepare the presentation by the end of today...

2 Click on ***Follow Up*** 🏳 and select **Add Reminder** to open the ***Custom*** dialog box

3 Ensure that ***Follow up*** in ***Flag to*** is selected, then type **Write presentation**

4 Ensure that ***Reminder*** is ticked and that the ***Reminder*** date and time are set to ***4:00 PM*** today, then click on **[OK]** to add the reminder

If a message appears telling you the folder doesn't support reminders, click on [Yes]. This may appear in training because you're not using the default data file. Don't worry, it won't appear in real life.

The reminder icon 🔔 and red flag will appear to the right of the message...

5 Ensure that the ***Reading*** pane is open, and then read the follow up and reminder information in the InfoBar

2

> **Custom**
>
> Flagging creates a to-do item that reminds you to follow up. After you follow up, you can mark the to-do item complete.
>
> 🏳 Flag to: Follow up
> Start date: Monday, 2 August 2010
> Due date: Monday, 2 August 2010
> ☑ Reminder:
> Monday, 2 August 2010 4:00 PM 🔔
> Clear Flag   OK   Cancel

4

> Arrange By: Date | Newest on top ▼
>
> ▲ **Two Weeks Ago**
> Peter Dawson — 22/07/2010 — Attaching Items
> Peter Dawson — 22/07/2010 — Parking
>
> ▲ **Three Weeks Ago**
> Amanda Bennett — 16/07/2010 — RE: Social Club
> Harry Jones — 16/07/2010 — New Products Presentation
> Harry Jones — 16/07/2010 — Fleet Management Expenses
> Amanda Bennett — 16/07/2010 — Marketing budget
> Harry Jones — 16/07/2010 — RE: New product ideas
> Amanda Bennett — 16/07/2010 — FW: New product ideas
> Amanda Bennett — 16/07/2010 — RE: New product ideas

5

> **New Products Presentation**
>
> Harry Jones
> ℹ Write presentation. Start by Monday, 2 August 2010. Due by Monday, 2 August 2010. Reminder: Monday, 2 August 2010 4:00 PM.
> You replied to this message on 22/07/2010 10:52 AM.
> Sent: Fri 16/07/2010 12:37 PM
> To: Peter Dawson
>
> Peter

For Your Reference...

To ***add*** a ***reminder*** to your messages:
1. Click on the message in a message list
2. Click on ***Follow Up*** 🏳 and select **Add Reminder**
3. Tick ***Reminder*** and change the ***Reminder*** date and time as desired
4. Click on **[OK]**

Handy to Know...

- At the specified ***Reminder*** date and time, Outlook will sound the reminder alarm and open the ***Reminder*** dialog box which lists the items and specifies when the items are due. Once the ***Reminder*** date and time have passed, the message text will appear red in the message list.

REMOVING A FLAG

Once you have actioned a flagged message, you should remove the flag to ensure you don't clutter up your message lists with flag indicators. This will also ensure that outstanding flagged items will stand our more clearly as well. To remove a flag, you can either clear the flag or mark the item as being completed.

Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file Watsonia_07.pst…

1. Click on the flagged *Parking* message from *Peter Dawson* to select it

2. Click on *Follow Up* 🚩▾ and select **Mark Complete**

    A check mark ✔ will replace the red flag in the Flag Status column indicating that the task has been completed.

    Now, let's clear a flag this time – perhaps you accidentally flagged the wrong message…

3. Click on the flagged *Marketing budget* message from *Amanda Bennett* to select it

4. Click on *Follow Up* 🚩▾ and select **Clear Flag**

    The red highlighting will be removed from the flag indicator leaving it empty

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For Your Reference…

To *remove* a *flag*:
1. Click on the message in a message list
2. Click on *Follow Up* 🚩▾
3. Select **Mark Complete** or Select **Clear Flag**

Handy to Know…

- When you *clear* a flag, the flag will be removed from the item. Outlook will also remove this item from views such as the *To-Do bar* and the task list in Tasks.

- A very quick method for marking a flagged item as being *complete* is to click in the *Flag Status* column for the message.

CONCLUDING REMARKS

Congratulations!

You have now completed the **Flagging messages** booklet. This booklet was designed to get you to the point where you can competently perform a variety of operations as listed in the objectives on page 2.

We have tried to build up your skills and knowledge by having you work through specific tasks. The step by step approach will serve as a reference for you when you need to repeat a task.

Where To From Here…

The following is a little advice about what to do next:

- Spend some time playing with what you have learnt. You should reinforce the skills that you have acquired and use some of the application's commands. This will test just how much of the concepts and features have stuck! Don't try a big task just yet if you can avoid it - small is a good way to start.

- Some aspects of the course may now be a little vague. Go over some of the points that you may be unclear about. Use the examples and exercises in these notes and have another go - these step-by-step notes were designed to help you in the classroom and in the work place!

Here are a few techniques and strategies that we've found handy for learning more about technology:

- visit CLD's e-learning zone on the Intranet

- read computer magazines - there are often useful articles about specific techniques

- if you have the skills and facilities, browse the Internet, specifically the technical pages of the application that you have just learnt

- take an interest in what your work colleagues have done and how they did it - we don't suggest that you plagiarise but you can certainly learn from the techniques of others

- if your software came with a manual (which is rare nowadays) spend a bit of time each day reading a few pages. Then try the techniques out straight away - over a period of time you'll learn a lot this way

- and of course, there are also more courses and booklets for you to work through

- finally, don't forget to contact CLD's IT Training Helpdesk on **01243-752100**