CHAPTER 4 **WORKING WITH VIEWS**

INFOCUS

Outlook lets you display items in its various folders using several predefined views or you can create your own custom views.

With the help of additional features such as sorting, filtering, being able to add and remove columns from a view, and the like, you can apply a view to ensure that you display only the items you want to see and that they display exactly as you want to see them.

In this session you will:

- ✓ learn how to change the current view
- ✓ learn how to arrange messages within the current view
- ✓ learn how to sort messages within the current view
- ✓ learn how to work with columns in the currrent view
- ✓ learn how to format columns in the current view
- ✓ learn how to create a custom view
- ✓ learn how to add a filter to a custom view
- ✓ learn how to delete a custom view.

CHANGING THE CURRENT VIEW

Outlook provides a number of ways of organising and displaying messages in folders – these are known as *views*. There are three predefined views which can be accessed via the *View* tab – *Compact*, *Single* and *Preview*. These views let you see your messages listed in a specific layout and with different amounts of content.

Try This Yourself:

Open File

Before starting this exercise you MUST open the file *Watsonia_06.pst...*

1. Click on *Inbox* to see all messages in this folder

2. Click on the *View* tab, then click on *Change View* in the *Current View* group to display the *Change View* gallery

3. Click on *Preview*

   The Reading pane will be closed and a short snippet of each unread message will appear…

4. Repeat steps *2* and *3* to change the view to *Single*

   Each message will appear in a single line but the Reading pane will open. This is the ideal view when you receive many messages a day…

5. Repeat steps *2* and *3* to revert to the default *Compact* view

   Here the Sender and Subject will appear on separate lines in each message and the Reading pane will be open. The People pane will also be open beneath the Reading pane
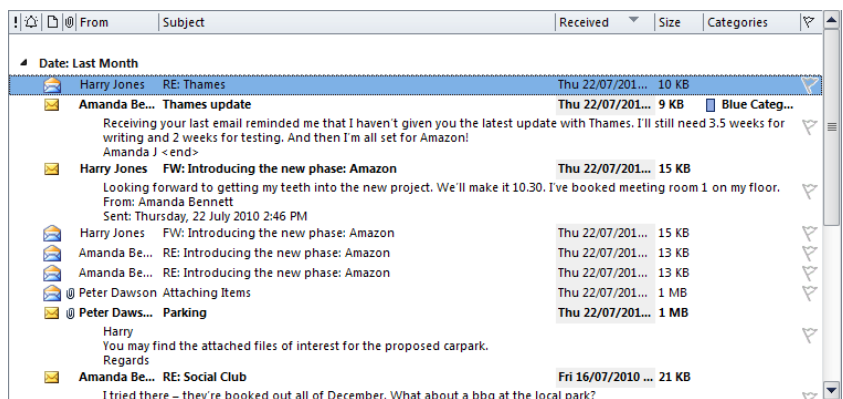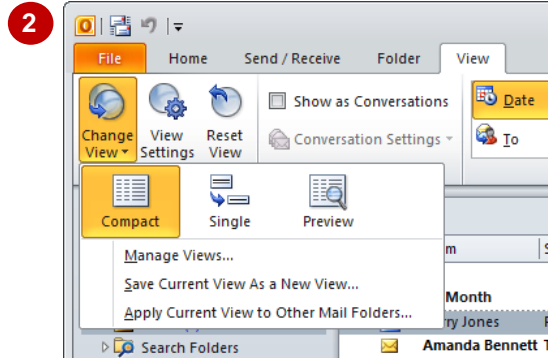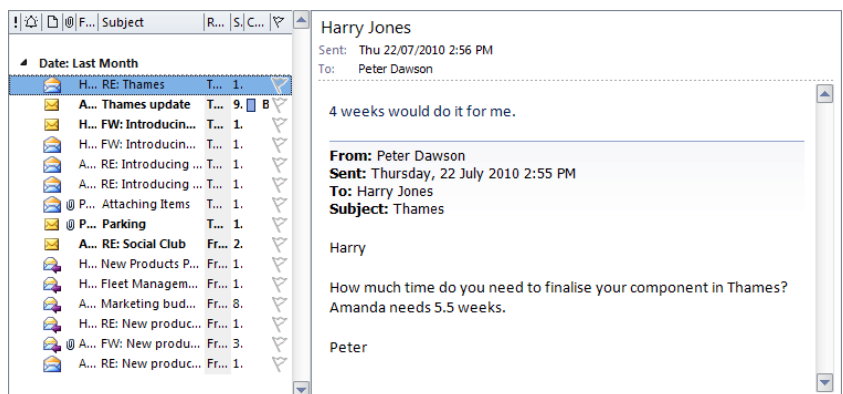
For Your Reference…

To *change* the *current message view*:

1. Click on the folder you wish to view
2. Click on *Change View* on the *View* tab
3. Select the desired view

Handy to Know…

- You can change the settings used by the default views. To do this, click on *Change View* and select **Manage Views**. Click on the *View* and click on **[Modify]**. You can revert to the default settings for a predefined view by changing the view to the desired view and clicking on *Reset View*.

ARRANGING MESSAGES WITHIN A VIEW

You can use the tools in the *Arrangement* group to organise your Mail folders. An arrangement is a predefined grouping and sorting order for the current view. For example, you can arrange your messages grouped by who you've received them from, subject, importance and more. You can also arrange them by conversations although this option is found in its own group on the *View* tab.

Try This Yourself:

Same File

Continue using the previous file with this exercise...

1. Ensure the *Compact* view is applied to the Inbox, then close the *Reading* pane if it is open

2. Click on the *More* button for *Arrangement* on the *View* tab to display the 12 predefined view arrangements

   Currently, the messages are arranged by Date...

3. Click on *Subject*

   Notice how the messages are arranged and grouped alphabetically (A – Z) by Subject…

4. Repeat steps *2* and *3* to try out some of the other arrangements

5. Click on *Date* in *Arrangement* to revert to the default arrangement again
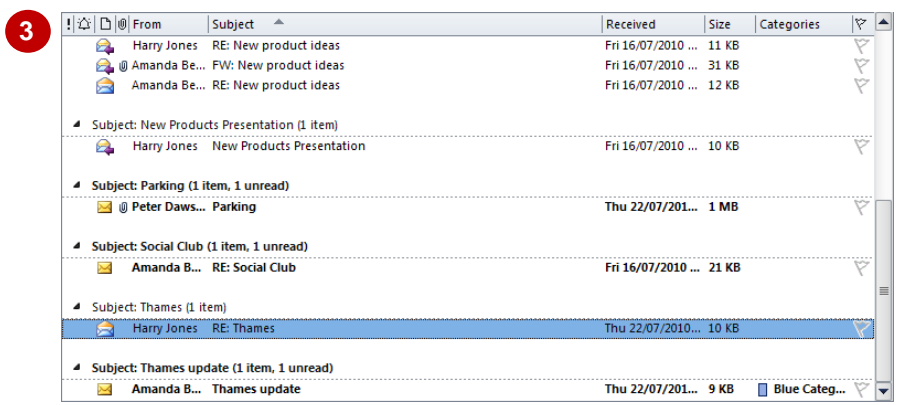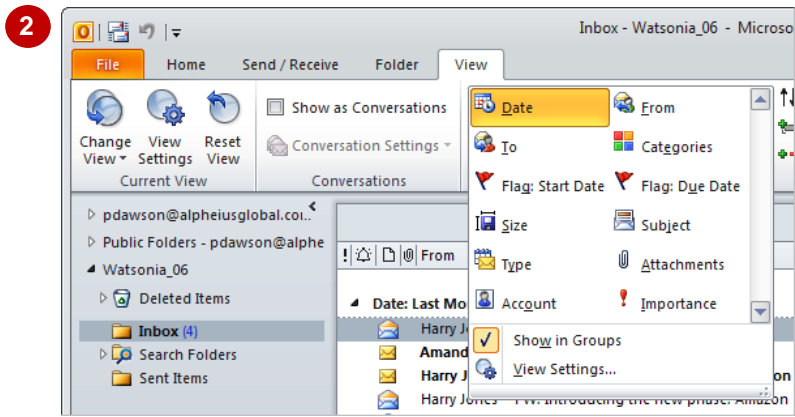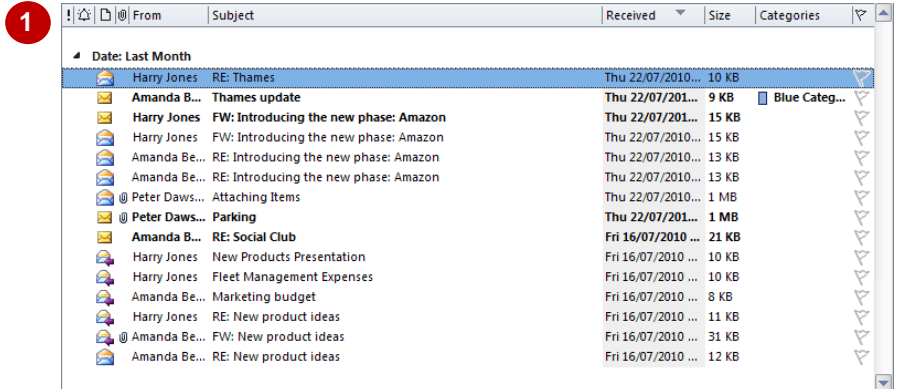
For Your Reference…

To *change* the *arrangement* of the current view:
1. Click on the folder you wish to view
2. Click on the *View* tab
3. Click on the desired view in *Arrangement*

Handy to Know…

- To arrange the view into groups, make sure *Show in Groups* is ticked in *Arrangement*.
- You can group messages by *conversations* (all messages with the same Subject even if they're stored in different mail folders) by ticking *Show as Conversations* in the *Conversations* group on the *View* tab.

SORTING MESSAGES WITHIN A VIEW

You can sort the messages within a view using several methods. After selecting the desired *Arrangement* option, you can click on *Reverse Order* ⬆⬇ as necessary. You can also click on a column heading in the view to sort the messages by that column – when you click on the same column heading again you will reverse the sort order.


Try This Yourself:

Same File

Continue using the previous file with this exercise.

*Currently, the list is sorted by date with the newest message at the top...*

1 Click on *Reverse Sort* ⬆⬇ in the *Arrangement* group to sort the messages with the oldest message at the top

2 Hover over the *From* column heading

   The tooltip Sort by: From will appear…

3 Click on the *From* heading to sort the messages by *From* in an ascending order – that is, from *A* to *Z*

4 Click on the *From* heading again − this time the messages will be sorted in a descending order

5 Use either method to sort the messages as desired

6 Click on *Date* in *Arrangement* to revert to the default arrangement again

   Alternatively, you could have clicked on the Received heading to sort the list in descending order

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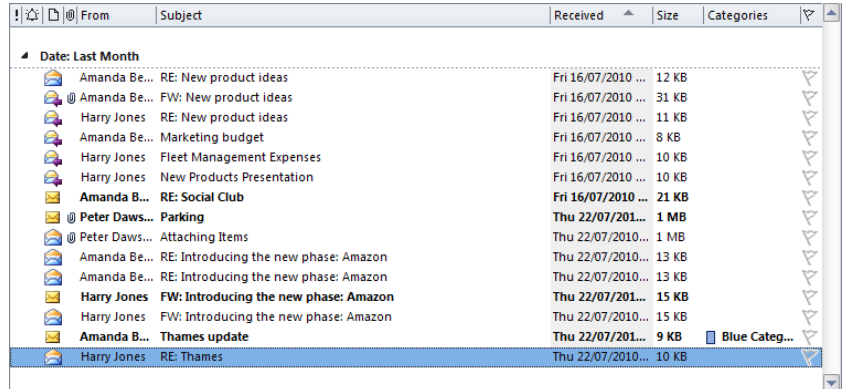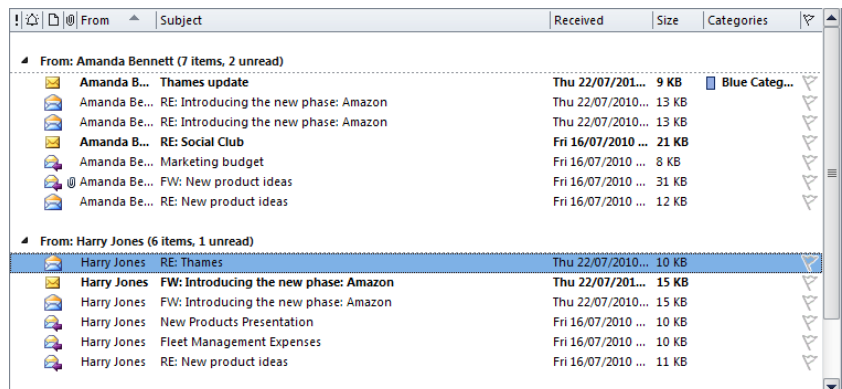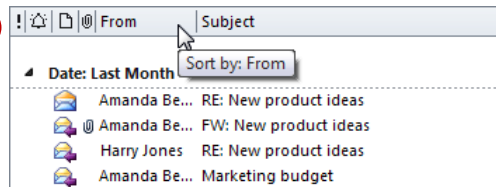
For Your Reference…

To *sort messages* within a view:
1. Click on the desired column heading
2. Click on the same heading again to reverse the order

or
1. Click on the desired option in *Arrangement*
2. Click on *Reverse Sort* ⬆⬇ as necessary

Handy to Know…

- Text-based columns, such as *From*, will be sorted in an ascending order (*A* to *Z*) when you first click on their heading. The reverse is true for number-based columns – for example, *Size* will be sorted from largest to smallest and *Received* will be sorted from latest to oldest.

WORKING WITH COLUMNS IN A VIEW

Each predefined view is made up of a number of columns that form a table of information about the messages in the selected folder. The columns comprising the views are not 'set in concrete'. For example, you can change the order in which they appear, you can remove unwanted columns from the view, and you can even add additional columns as desired.

Try This Yourself:

Same File

Continue using the previous file with this exercise...

1 Drag the **Received** column heading to the left until two red arrows appear to the left of **Subject** and then release the mouse button to relocate the column

2 Repeat step **1** to drag **Received** to its original position to the left of the **Size** column

You can remove columns...

3 Drag **Received** down off the column heading area (a black cross will appear in the heading box) and then release the mouse button – the column and its data will disappear

Let's add it again...

4 Click on **Add Columns** in the **Arrangement** group to open the **Show Columns** dialog box

5 Click on **Received** under **Available columns**, click on **[Add]**, then drag **Received** up and drop it between **Subject** and **Size**

6 Click on **[OK]** to add the column
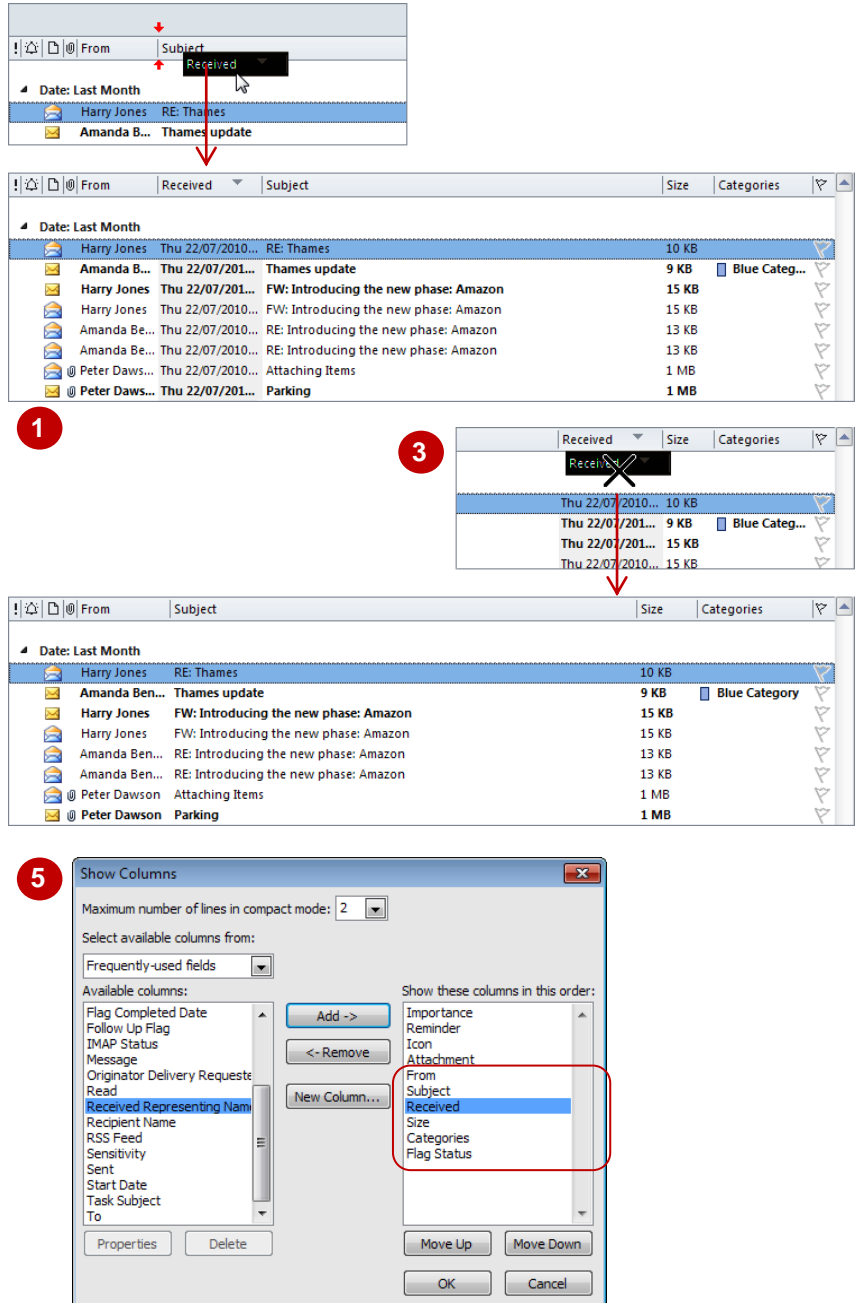
For Your Reference…

To **move columns** in the current view:

1. Drag the column heading to the desired position

To **remove columns** from the current view:

1. Drag the column heading down and off the column heading area

Handy to Know…

- You can also remove a column from the current message view by right-clicking on the column heading and selecting **Remove This Column**.

FORMATTING COLUMNS IN A VIEW

The Mail folders views are made up of columns of data. You can change the format and width of these columns to suit your needs. For instance, to save screen space you might change the

format that is used to display dates in **Received**, or you might change the width of **From** to **best fit** which alters the column width to neatly fit the largest entry in the column.

Try This Yourself:

Same File

Continue using the previous file with this exercise...

1 Ensure that the Outlook window is maximised

2 Hover over the right-hand vertical column marker for **Subject** until the cursor appears as a double-headed arrow ✛

3 Click on and drag the column marker to the left to reduce the width of the **Subject** column

4 Double-click on the right-hand column marker for **Subject** to change the column to **best fit**

5 Repeat step **4** to change **From** to **best fit**

6 Click on **View Settings** to open the **Advanced View Settings** dialog box, then click on **[Format Columns]** to open the **Format Columns** dialog box

7 Click on the **Received** field, click on the drop arrow for **Format** and select **dd/mm/year**, click on **Best fit** for **Width**, and then click on **[OK]** twice to reformat **Received**
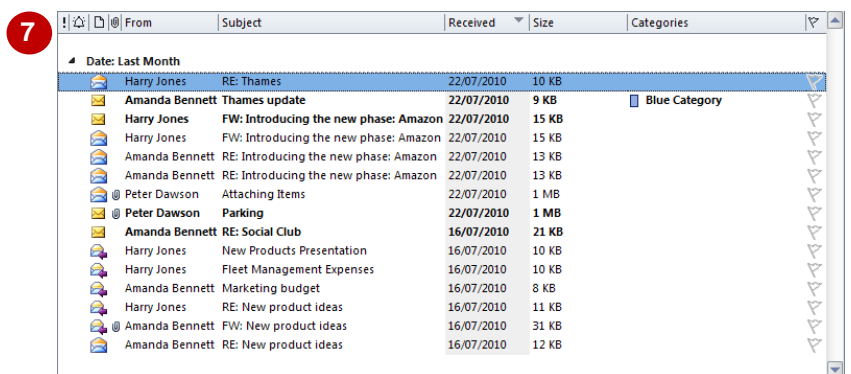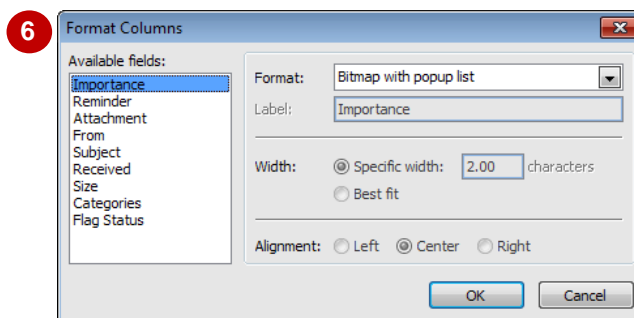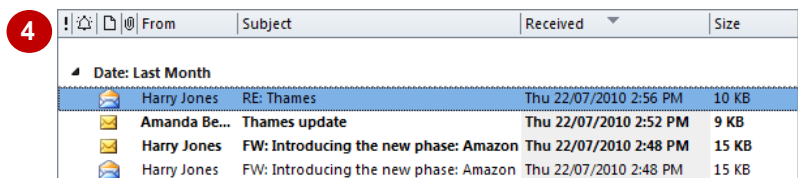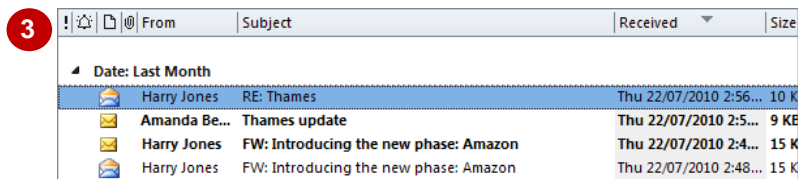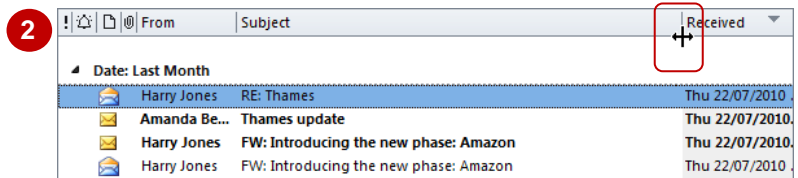
For Your Reference…

To *alter* the *width* of a *column* using the mouse:
1. Drag the column marker as desired

To *format* a *column*:
1. Click on **View Settings** and click on **[Format Columns]**
2. Click on the field and alter the options

Handy to Know…

- You can customise all features of a specific view from the one location. To do this, click on **Change View** and select **Manage Views** to open the **Manage All Views** dialog box. Here you can select the view and then you can set a filter, alter the fonts, reset the defaults for the view, plus much more.

CREATING A CUSTOM VIEW

Although Outlook provides only three predefined views, you can create your own custom views. You can create a new view either from scratch or by basing it on the closest matching predefined view. Creating a view based on an existing one can save time as you may only need to make a few minor changes to the original settings.

1

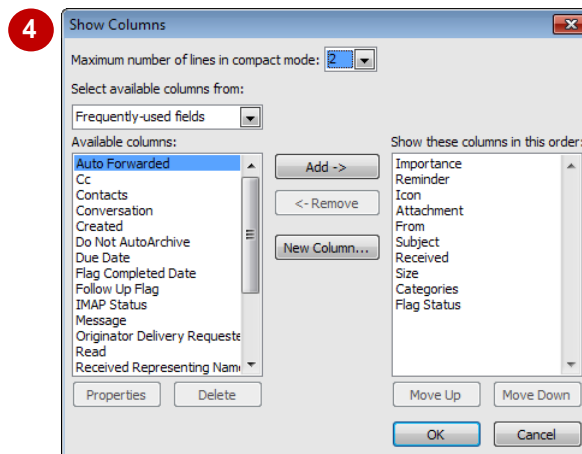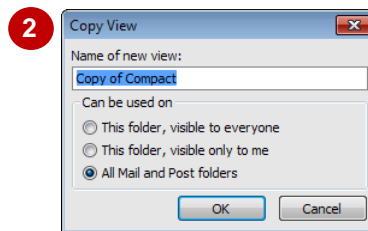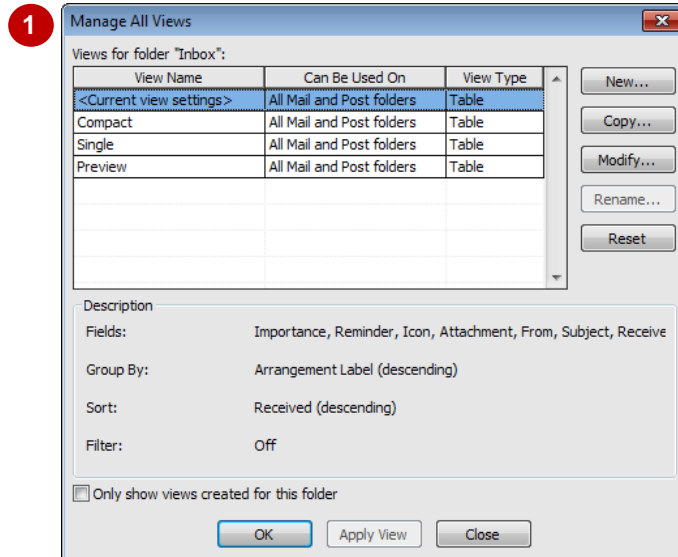## Try This Yourself:

Continue using the previous file with this exercise...

1 Click on *Change View* 🔄▾ and select *Manage Views* to open the *Manage All Views* dialog box

2 Click on *Compact* under *View Name*, and then click on **[Copy]** to open the *Copy View* dialog box

3 Type **Amazon** in *Name of new view*, click on *This folder, visible only to me* and then click on **[OK]** to open the *Advanced View Settings: Amazon* dialog box

4 Click on **[Columns]** to open the *Show Columns* dialog box

5 Click on *Importance* under *Show fields in this order*, press [Ctrl] and click on *Reminder* and *Size* to select the fields

6 Click on **[Remove]** – these fields will not appear in the new view

7 Click on **[OK]** twice and then click on **[Apply View]** to apply the custom view

At the moment, nothing much will happen until we apply a filter

Manage All Views

Views for folder "Inbox":

View Name	Can Be Used On	View Type
<Current view settings>	All Mail and Post folders	Table
Compact	All Mail and Post folders	Table
Single	All Mail and Post folders	Table
Preview	All Mail and Post folders	Table

New...
Copy...
Modify...
Rename...
Reset

Description

Fields: Importance, Reminder, Icon, Attachment, From, Subject, Receive

Group By: Arrangement Label (descending)

Sort: Received (descending)

Filter: Off

☐ Only show views created for this folder

OK   Apply View   Close

2

Copy View

Name of new view:

Copy of Compact

Can be used on

◯ This folder, visible to everyone
◯ This folder, visible only to me
◉ All Mail and Post folders

OK   Cancel

4

Show Columns

Maximum number of lines in compact mode: 2 ▾

Select available columns from:

Frequently-used fields ▾

Available columns:

Auto Forwarded
Cc
Contacts
Conversation
Created
Do Not AutoArchive
Due Date
Flag Completed Date
Follow Up Flag
IMAP Status
Message
Originator Delivery Requeste
Read
Received Representing Nam

Add ->
<- Remove
New Column...

Show these columns in this order:

Importance
Reminder
Icon
Attachment
From
Subject
Received
Size
Categories
Flag Status

Properties   Delete   Move Up   Move Down

OK   Cancel

For Your Reference…

To *create* a *new view* based on an existing view:

1. Select *Change View* 🔄▾ > *Manage Views*
2. Select the view and then click on **[Copy]**
3. Name the view and then click on **[OK]**
4. Customise the view as desired
5. Click on **[OK]** twice then on **[Apply View]**

Handy to Know…

- You cannot rename a predefined view, even if you have customised it. Instead, copy the predefined view, give the copied view a new name, and then change the settings.
- New views appear in the *Change View* gallery.

ADDING A FILTER TO A CUSTOM VIEW

Filtering is different to sorting. When you sort items, you rearrange the items that currently appear in the view. When you filter items, you selectively choose which items will appear in the view. Applying a filter to a view lets you see only the information you require. You can specify a filter when you create or modify a custom view, or you can add a filter to a predefined view.

Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file Watsonia_06.pst...

1 Click on *Change View* 🔵▾ and select *Manage Views* to open the *Manage All Views* dialog box

2 Click on *Amazon* under *View Name*, and then click on **[Modify]** to open the *Advanced View Settings: Amazon* dialog box

3 Click on **[Filter]** to open the *Filter* dialog box, then ensure the *Messages* tab is open

4 Type **amazon** in *Search for the word(s)* and select *subject field and message body* in *In*

5 Click on **[OK]** twice and then on **[Apply View]** to apply the *Amazon* view filter

3 [Filter dialog box]

5 [Message list showing filtered items]
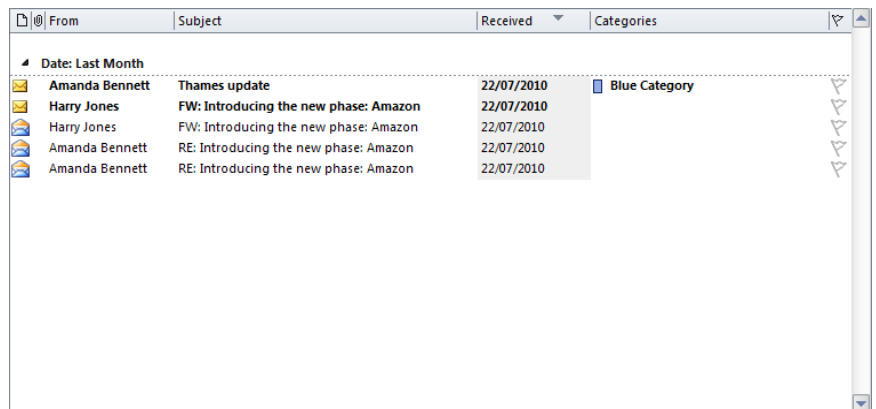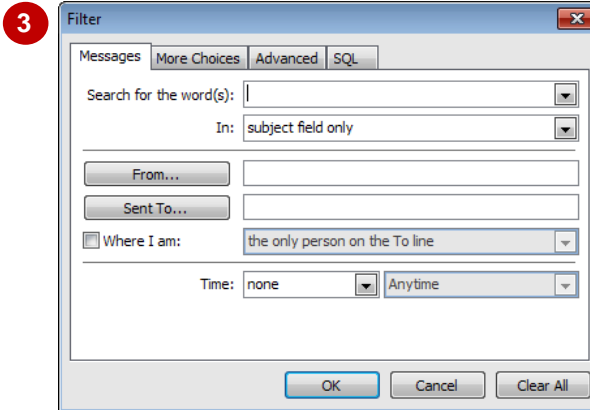
For Your Reference…

To **add** a **filter** to a view:

1. Select *Change View* 🔵▾ > *Manage Views*
2. Select the view and then click on **[Modify]**
3. Click on **[Filter]**
4. Specify the desired filter criteria
5. Click on **[OK]** twice then on **[Apply View]**

Handy to Know…

- When a View filter is applied to a selected folder, the words *Filter applied* will appear at the left end of the status bar.

DELETING A CUSTOM VIEW

When you create a custom view it is automatically added to the *Change View* gallery just like the predefined views. If you create custom views regularly, you should consider deleting unwanted views to ensure that the *Change View* gallery doesn't become cluttered with unnecessary views.

Try This Yourself:

Continue using the previous file with this exercise, or open the file Watsonia_06.pst...

1 Click on *Change View* to display the *Change View* gallery

Notice that the Amazon custom view is currently applied to the Inbox.

*Let's apply the default view so that you can delete the custom view...*

2 Click on *Compact* to apply the default view to the Inbox

3 Click on *Change View* and select *Manage Views* to open the *Manage All Views* dialog box

4 Click on *Amazon* under *View Name* and then click on **[Delete]**

A message will appear asking you to confirm your intentions...

5 Click on **[Yes]** to delete the custom view and then click on **[Close]** to return to the Inbox

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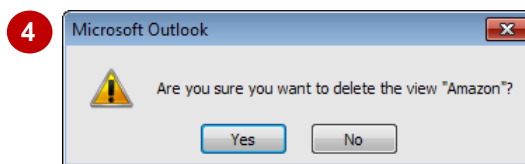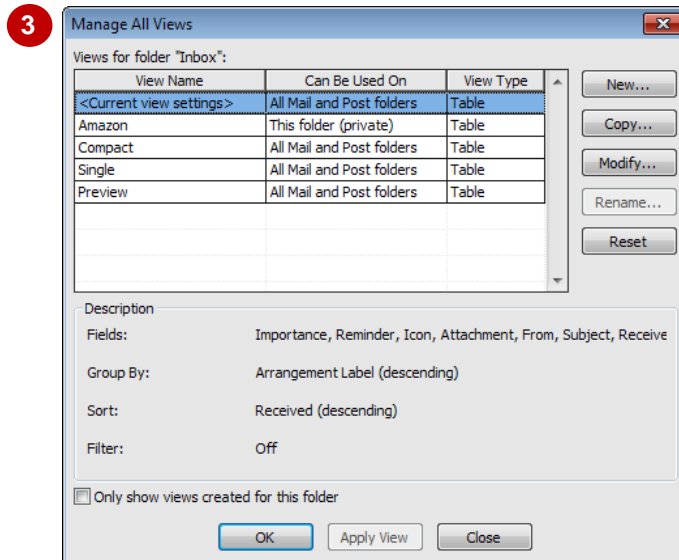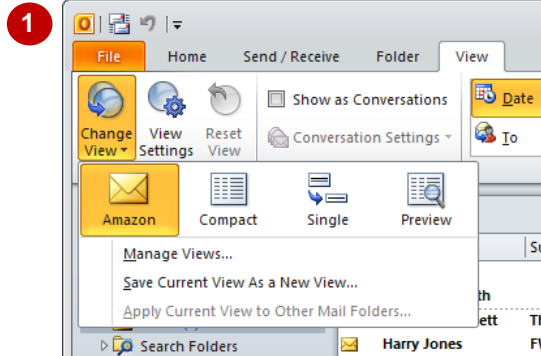
For Your Reference…

To *delete* a *custom view*:

1. Select *Change View* > *Manage Views*
2. Click on the desired custom view
3. Click on **[Delete]**
4. Click on **[Yes]** and then on **[Close]**

Handy to Know…

- If you accidentally delete a custom view, you cannot undo the deletion. Instead, you will have to rebuild the view again.

NOTES: