JOURNAL ENTRIES

Journal automatically records actions that you choose which relate to specific contacts and puts the actions in a Timeline view. You can use Journal to track Microsoft Outlook items, such as e-mail messages or meetings. It can also track other Microsoft Office files, such as Word documents or Excel workbooks. Journal keeps a record of any interaction that you want to remember — even something that is not located on your computer, such as a phone conversation or a paper letter that you mailed or received.

To quickly access Journal, you can add the **Journal** view button to the Navigation Pane. At the bottom of the Navigation Pane, click **Configure Buttons** , then click **Add or Remove Buttons**, and then click **Journal**.

RECORDING ITEMS AND FILES IN JOURNAL

RECORD ITEMS AND FILES AUTOMATICALLY

1. Click the **File** tab.
2. Click **Options**.
3. Click **Notes and Journal**.
4. Click **Journal Options**.
5. In the **Automatically record these items** list, select the check boxes for the items that you want recorded automatically in **Journal**.
6. In the **For these contacts** list, select the check boxes for the contacts whose items you want recorded automatically.
7. In the **Also record files from** box, select the check boxes next to the programs from which you want to automatically record files in **Journal**.

RECORD AN OUTLOOK ITEM MANUALLY

1. From any module in Outlook, on the **Home** tab, in the **New** group, click **New Items**, point to **Other**, and then click **Journal Entry**.
2. In the **Subject** box, type a description.
3. In the **Entry type** box, click the type of journal entry that you are recording.
4. Select other options that you want.

RECORD A FILE FROM OUTSIDE OF OUTLOOK MANUALLY

1. Locate the file that you want to record. You can use Outlook, Windows Explorer or the desktop.
2. Drag the items to **Journal**.
3. Select the options that you want for the journal entry.

JOURNAL ENTRIES

RECORD THE DATE AND TIME YOU WORKED WITH A CONTACT

1. Open the contact.
2. On the **Contact** tab, in the **Communicate** group, click **More**, and then click **Journal Entry**.
3. The current date and time appear in the Journal item header. To change the date or time, click the arrow attached to each box, and then click the selection you want.
4. To document the exact start and end time, on the **Journal Entry** tab, in the **Timer** group, click **Start Timer**.

   The Journal item records the date and length of time that you worked with the contact. Click **Pause Timer** to stop the clock.

5. Click **Save & Close** on the **Actions** tab to record the information into your Journal.

CHANGING THE START AND END TIMES OF JOURNAL ENTRIES

CHANGE START AND END TIMES AUTOMATICALLY FOR ALL ENTRIES

1. In Journal, in Timeline view, on the **View** tab, in the **Current View** group, click **View Settings**, and then click **Columns**.
2. In the **Select available fields from** box, click the field set that you want. This normally would be **Frequently used fields** or **All Journal fields**.
3. In the **Available date/time fields** box, click the field that contains the time that you want to use as the start time for the item, and then click **Start**.
4. In the **Available date/time fields** box, click the field that contains the time that you want to use as the end time for the item, and then click **End**.

Tip: The Timeline view shows when each item and document was created, saved, sent, received, opened, and modified. When you change the time fields used to display items on the timeline, the location and duration of the items may change on the timeline.

CHANGE START AND END TIMES FOR A JOURNAL ENTRY MANUALLY

1. Open the journal entry.
2. Enter a new start date and time. To change the end time, change the number in the **Duration** box.

Note: Changing the times associated with a journal entry does not change the start time of the item, document, or contact that it refers to.

TURNING OFF OR EMPTYING JOURNAL

TURN OFF JOURNAL

To turn off Journal, you must clear multiple check boxes in the Journal Options dialog box. No single option turns Journal off.

To turn journal off:

1. Click the **File** tab.
2. Click **Options**.
3. Click **Notes and Journal**.
4. Click **Journal Options**.
5. In the **Automatically record these items** list, clear all check boxes,
6. In the **Also record files from** box, clear all check boxes.

Note: It is not necessary to clear the check boxes under **For these contacts**.

EMPTY JOURNAL

Emptying Journal involves deleting entries.

1. In Journal, on the **Home** tab, in the **Current View** group, click **Entry List**. A table view of all Journal entries appears.
2. Do one of the following:
   - **To choose a single entry** Click the entry you want.
   - **To choose multiple entries** Hold down CTRL, and then click the entries you want. If you want to choose a set of adjacent entries, click the first entry, hold down SHIFT, and then click the last entry.
   - **To choose all entries in a folder** Click any entry, and then press CTRL+A.
3. On the **Home** tab, click **Delete**, or press **DELETE**.

REFERENCES

Microsoft Corp. “Outlook Help.”

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