



The Poststream User Guide

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Introduction

Postream is a new way of working within Outlook. It lets you file call and meeting “posts” in your Outlook folders along with your emails, easily thread them together in a “stream” with a common subject, and link Outlook tasks to any one of them. It will quickly make you more efficient, more productive, and much more in control of your work and personal life.

Installation

Make sure Outlook is shut down before you begin the installation. Once you download Postream, simply double-click on the program, or right-mouse click over it and click “Install” to begin the installation. You may get a message box that says, “The publisher could not be verified. Are you sure you want to run this software?” Click “Run” to continue the installation. It's easiest to use the default settings in the Install program and click the “Next” button on each screen until you click “Close” on the final screen.

Now, open Outlook. It might take a few moments longer to open with Postream installed, depending on the number of folders you have, but you shouldn't notice any difference in performance or speed once you get to work—except your own. You're about to get a lot more done and feel more relaxed while you do it.

Important! You must set your email editor to HTML to use Postream.

HTML offers all the formatting features you're used to having in email, including choice of font and font size, bold, italic, underline, bulleted and numbered lists, Spellchecker and much more.

To make this designation once you have opened Outlook, click Tools/Options on Outlook's menu bar. In the “Options” box click the Mail Format tab. Make sure “Use Microsoft Office Word...” to edit or read email messages is not checked. Then, select HTML in the “Compose in this message format” menu. Click “OK” to close the Options box. To make sure all your formatting options are available to you, click “View/Toolbars” on the menu bar of any email, and make sure the “Formatting” toolbar is checked.

If you have a problem...

Check the Troubleshooting section at the end of this Getting Started Guide. There's probably an easy explanation that will enable you to enjoy the considerable benefits of Postream.

Getting Started Tutorial - a quick look at some key features

The phone's just rung again. Click the "Scratchpad" button in the Postream toolbar. A "post" window appears. Type "Project X" in the Subject field, then type "Important notes from my phone call" in the notes field. Click the "Post" button and the post appears in your Inbox. You can treat it just like an email!

Click the post in your Inbox to select it, then click the "Link Task" button in the Postream toolbar. Type "Talk to Bob" in the Subject field of the task, set the Due Date as "Today," then click "Save and Close." The post is bolded, showing it has a task pending.

Go to the Task View in Outlook and there's your task. Ready to talk to Bob about it now? Click the task to select it, then click "View Email/Post" on the Postream toolbar. The "call" post appears with the notes you need to refer to when you make the call! No more scrambling to find a post-a-note or digging through files.

Building a Stream

Go back to your Inbox, select any email by clicking on it, then click "Post to stream" in the Postream toolbar. A post appears, but this time with the same Subject as the email—Postream is making it easy for you to add posts to an existing message thread! In the "Post Type" field, drop-down the list and select "Meeting," then type "Meeting notes" in the Notes field. Click "Post," and the post appears in your Inbox. Now meeting notes, as well as call notes, can be part of your message streams.

Need to send an email to someone about that meeting? Select the Meeting post by clicking on it, then click "Mail to stream." An email appears with the same Subject as the post—Postream is making it easy for you to add emails to an existing message thread! Send the email to an understanding recipient, perhaps with a message like "You oughta check out Postream!" Notice your copy appears in your Inbox. Postream files both emails and posts in the same folder as the original item, similar to how your replies are probably filed. It's a great time-saver for those of you who are filers.

Looking at the stream of posts and emails

Move that email to the Sent folder, where it would have been filed if you weren't using Postream. Now, let's look at the whole stream. Select the Meeting post in the Inbox by clicking on it, then on Outlook's main toolbar click "Tools/Find/Related Messages". All the messages in the stream are displayed in Outlook's Advanced Find window, both posts and emails, regardless of where they've been filed!

Filing made easy

Postream also makes it easy for you to initiate new streams, or message threads, in any folder, saving you more filing time. If you'd like to see how this works, select one of your email folders and click "Mail in Folder" in the Postream toolbar. When you send the email, your copy will appear in the folder you have selected—this ends the filing chore you used to face periodically when all your sent emails piled up in your Sent folder! Now click "Post in Folder," enter a Subject and some sample notes in the post window, then click "Post." The post is filed in the folder you selected.

Summary

Postream makes it easy for you to keep all the information in a message stream connected, and to efficiently manage all the action items generated by that stream. The sections that immediately follow take you step-by-step through the capabilities of Postream, and only take about 20-30 minutes. The final sections describe each of the buttons on Postream's toolbars. Depending on how you prefer to learn, you can either go through the examples in the next sections, or go directly to the description of the toolbar buttons and begin playing around with them. The examples provide details, and describe some important capabilities, that are not covered in the toolbar button descriptions.

It's our hope that Postream puts you in control of the stream of information coming at you, so that both your professional and personal lives are more relaxed—and more enjoyable!

Creating a folder to store a stream

If you already create and use your own folders in Outlook, add a new folder called "Postream Test". Now it's time to start building a stream, or "conversation" as Outlook refers to it, and managing the tasks that are generated by that stream.

If you're not familiar with creating folders in Outlook, first select one of the top-level folders in Outlook's left-hand column (the Navigation Pane) by right-clicking on it. If you're using Outlook with an Exchange Server, this folder might be called "Mailbox-"Your Name," or something similar. If you're using Outlook as a stand-alone client, look for a top-level folder called something like "Personal Folders."

After right-clicking on this folder, click "New Folder" in the menu that appears. Type "Postream Test" in the "Name" field of the dialog box that appears, then click OK. You should now see a folder called "Postream Test" in the Navigation Pane. If you don't see the folder, you should be able to scroll the view in the Navigation Pane until it appears.

Posting call notes in a folder

Let's say you've just received an important phone call, and you want to record your notes from the call. If you've just gone through the Getting Started section, these initial capabilities will seem familiar to you, but you will quickly come to some new ones.

Select the "Postream Test" folder by clicking on it. Then, on the Postream toolbar in the main Outlook window, click "Post In Folder".



A new "post" window appears. Click the down-arrow by the "Post Type" field in the Postream toolbar, then click "Call," to indicate you're posting notes from a phone call.

In the Subject field of the post, type "Project X". The Subject contains the "stream", or "conversation" as Outlook refers to it, which ties related items together. Postream requires a Subject, in posts and emails, for certain functions to work.

In the notes field, type "Notes from my phone call."

Next, click the "Post" button in the standard toolbar that Outlook provides in the post. The post is automatically filed in the "Postream Test" folder.

Adding a Contact to a Post

Did you remember to set your email editor to HTML? The procedure for this is described in the "Installation" section at the beginning of this guide, and only takes a few seconds. This is necessary in order for the Contacts function and other functions to work properly.

Open the post again just as you would an email, either by double-clicking it, or by selecting it and pressing the "Enter" key.

In the same Postream toolbar that has the "Post Type" field, click on the "Contacts..." button. The same box appears that you see when you address an email.

Select any name in the list you'd like to use for this example and click "OK". The name will appear in the "Contacts..." field of the post.

IF THE LIST IS BLANK, it's because Postream only uses your personal Contacts list, and you haven't added anyone to this list. It's easy to do. Close the "Select Names" box and close the post, then open an email window as if you were getting ready to send a new email. Click the "To" button, right-mouse click on any name in the list, and in the menu that appears click "Add to Contacts". A Contact card will appear that is already filled out with the person's name and email address. Click "Save and Close" on the Contact window toolbar. Do this as many times as you'd like to add people to your Contacts list. When you're finished, close the email window, open the post, click on "Contacts..." and select a name to use for this example.

Once you've selected a Contact, close the post by clicking on the "X" in the upper right hand corner, then say "Yes" in the box that asks, "Do you want to save changes?"

Adding an Email to a Stream

Now, let's say you want to email someone about the phone conversation you've just had.

Select the "Call" post in the "Postream Test" folder by clicking on it, then on the Postream toolbar click "Mail to stream". An email appears with the same subject as the post.

Select someone you can send this test email to, put some explanatory notes such as "Testing Postream" in the notes field, and send the email. After sending, the email is automatically filed in the "Postream Test" folder.

Adding a "Post Type" Column

Postream provides an easy way to see the types of posts in each folder. Position your cursor over one of the column headings, such as "Subject" or "Received," and right-mouse click. In the menu that appears, click on "Field Chooser". The "Field Chooser" box appears.

Click the down-arrow in the list box at the top of the "Field Chooser", scroll all the way down, and click on "User-defined fields in folder". You will see fields that have been added by Postream.

In some cases, you might not see the fields added by Postream right away. This is a characteristic of Outlook. After a little usage, these fields will appear and you can add them to your column heads.

Position your cursor over "PostType", click and hold the left-mouse button, then drag-and-drop this field onto the other column headings. You can now see the "type" of posts that your folder contains.

Close the "Field Chooser" box.

You can use the same drag-and-drop method, clicking and holding the left- mouse button down while it's positioned over "PostType", to position this field among the other column-heading fields. You can adjust the width of the column headings by moving the cursor over one of the heading divider lines until it turns into a left-right arrow. Click and hold the left-mouse button and drag left or right to change the width of the column.

Linking an Outlook Task to an Email

Select the email in the Postream Test folder by clicking on it, and on the main Postream toolbar in the Outlook window click "Link Task". An Outlook Task window appears.

On the Postream toolbar in the Task window, click "Meeting". "Meeting" now appears in the Subject field of the task. Click the down-arrow by the "Due Date" field in the Task window and click "Today". Click "Save and Close" in the Outlook Task toolbar.

You'll notice after a moment that the email is in bold type face, the same as emails that have not yet been read. This is how Postream displays items with linked tasks that have not yet been completed.

Using Linked Tasks in Outlook's Task View

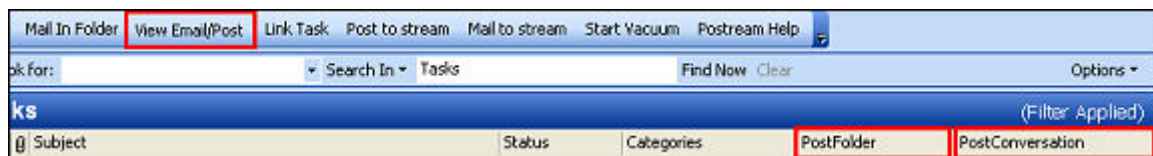
Now, at the bottom of Outlook's Navigation Pane (the left-hand column), click the red check-mark that will take you to the Tasks view. You can see the task that you just linked to your email.

Look at the column heads in the Task View and you'll see two custom columns added by Postream. One is "PostFolder," which displays the folder containing the email or post to which the task is linked. The other is "PostConversation," which displays the Conversation (roughly equivalent to the Subject without things like "Re:" and "Fw:") of the post or email.

If these columns are not displayed, you can use the *Field Chooser* to display them. To do this, right-mouse click over the column headings and select *Field Chooser*.

Drop-down the list at the top of the Field Chooser box, scroll down and select *User-defined fields in folder*. Drag-and-drop *PostConversation*, for example, onto the column headings. Now you'll can see the PostConversation column displayed. Do the same for *PostFolder*. Close the "Field Chooser."

Select the task linked to the email by clicking on it. Then, on the Postream toolbar in the Task view, click "View Email/Post".



The email to which you just linked the task is opened for review. This is a quick way to review messages linked to tasks.

Close the email, and with the task still selected, click "Goto Folder" on the Postream toolbar. The view switches to the "Postream Test" email folder. This is a quick way to review the entire folder that contains the email to which the task linked is linked.

Defining a Contact for a Task

Postream makes it as easy to add a Contact to a task as it is to address an email. When you define contacts for a task, you can then sort on the "Contacts" column in the Task List View, giving instant visibility of all tasks pending with a specific individual.

Again, select the email in the “Postream Test” folder, then click the “Link Task” button in the main Postream toolbar. The task that you just defined is opened. If no task were linked to the email, Postream would open a new task window.

Click “Contacts...” in the Postream toolbar in the task window. As with the “Contacts...” button in the post, you see the same box that you see when addressing an email. Select a person’s name in the list, then click OK. That person’s name is placed in the “Contacts...” field at the bottom of the Task window.

Click “Save and Close” in the Task window. Close the email.

Go back to the Task View. You can now see that person’s name in the *Contacts* column.

If the Contacts column is not displayed, you can use the *Field Chooser* to display it. As in previous examples, right-mouse click over the column headings and select *Field Chooser*. Select *Frequently used* fields in the drop-down the list at the top of the Field Chooser box, then drag-and-drop *Contacts* onto the column headings. You’ll now see the Contacts column, and the contact’s name displayed.

Close the “Field Chooser.”

Adding a Post to a Stream

This task now has a Contact and its Subject is “Meeting”: you’ve scheduled a task to meet with this person. Select the task in Task View by clicking on it, then click “Goto Folder” in the main Postream toolbar. Open the email in the “Postream Test” folder that has the task linked—let’s pretend you’re reviewing it because the person you need to meet with just walked up to your desk and you’re having a spontaneous conversation about it. To easily save notes about the conversation and connect them with the email, click the “Post to stream” button in the email window.

A new post appears with the same Subject as the email. In the Postream toolbar in the post, set the Post Type to “Meeting”, and enter the person’s name in the “Contacts...” box.

In the notes field, type “Notes from my meeting.” Click “Post” in Outlook’s Post toolbar to save and close the post, and close the email. Now you can see the meeting notes, part of the “Project X” stream (Conversation), filed in the “Postream Test” folder with the email.

Viewing the Entire Stream, or “Conversation”

Postream helps you use Outlook to work with message streams much more effectively. Outlook calls a stream a “Conversation,” which is the same thing as the “Subject” of an email or post with things like “Re” and “Fw” removed. Outlook provides some very handy and effective ways for viewing the entire Conversation.

Viewing Conversations Across Folders

In Task View, select the “Meeting” task that is linked to the email and then click “View Email/Post”. Let’s pretend you’re reviewing the email, and now you decide you’d like to review the entire Conversation. In the menu bar of the email, click “Tools/Find All/Related Messages...” Outlook’s “Advanced Find” window appears, and the list box in the window is filled with all the messages, both emails and posts, that have the same Conversation as the email you were reviewing. The nice thing about Advanced Find is that it finds items with the same Conversation no matter what folder they are in.

Close the “Advanced Find” window.

NOTE: If you had selected this email by clicking on it in the “Project X” folder, the same operation is available to you through the “Tools/Find/Related Messages” selection on Outlook’s main menu.

In the email window, you can create a short-cut so that you can view the entire Conversation in just one click. With the email window open, click "Tools" on the menu bar of the email, then click "Customize". In the Customize window, click the "Commands" tab, and in the "Categories" list on the left-hand side click "Tools". Scroll the list on the right-hand side until you see "Related Messages...". Position the cursor over "Related Messages...", hold-down the left-mouse button, then drag-and-drop "Related Messages..." on to the menu bar of the email. You've just added "Related Messages..." to the menu bar of all your emails and posts!

Viewing Conversations Within Folders

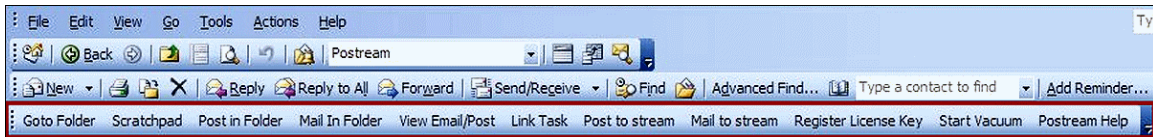
Go back to the "Postream Test" folder, position your cursor over "Subject" in the column heading row, click and hold the left-mouse button, then drag "Subject" down until an "X" appears over it and release the left-mouse button. Position your cursor over the column headings row, right-mouse click, then click on "Field Chooser" as you did in earlier examples. Select "Frequently-used fields" in the drop-down list at the top of the Field Chooser box, then drag-and-drop "Conversation" on to the column headings row. Close the "Field Chooser" window.

Left-mouse click on the "Conversation" column heading and the messages in this folder are sorted by Conversation. If you did this with "Subject", the messages with "FW:" and "RE:" would be alphabetically sorted in different places, and you wouldn't be able to see the whole "stream" of messages.

The Postream Toolbars

Postream Toolbar in the Main Outlook Window

Postream adds the following toolbar (highlighted) to the main Outlook window. The functions of the toolbar buttons are described below.



Goto Folder



When a task is selected in the Task View, clicking this button opens the folder that contains the post or email to which the task is linked. The linked message is not necessarily selected in the folder view, but any messages linked to tasks that are not "Complete" are bolded, and are also displayed in a different color if you have modified Task View as described in [Displaying Posts/Emails with Linked Tasks Differently than Unread Emails](#). Using the "Goto Folder" button provides another way to review a message stream before deciding if you want to do a task or reschedule it. This button works only in the Task List View.

Scratchpad



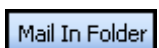
Clicking "Scratchpad" creates a new post, so you're immediately ready to take notes if the phone should ring, or someone walks up to your desk. When you're finished taking notes, click "Post" in the post window, and the post will be filed in your Inbox. You can then file the post in any folder you want using the usual filing methods in Outlook.

Post in Folder



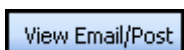
Select any one of your email folders in Outlook's Navigator, then click "Post in Folder." A new post window appears. When you're finished and click the "Post" button in the Post window, the post will be filed in the folder you selected.

Mail in Folder



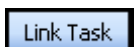
This button eliminates the problem of having to re-file sent mail that has ended up in the Sent folder. Select any one of your email folders, then click "Mail in Folder." A new email message appears. When you send the email your copy will be filed in the folder you selected.

View Email/Post



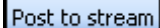
This button works only in the Task List View. Select a task in the task list that is linked to a post or email and click "View Email/Post." The post or email is presented for your review.

Link Task



Select a message in one of your email folders and click "Link Task." If the message does not have a task linked, a new task window is presented. If the message does have a task linked, the existing task is presented for review or editing.


Post to stream

A rectangular button with a blue border and the text "Post to stream" in blue.

Select an email or post in an email folder. Click "Post to stream." A new post is created with the same "Conversation" as the item selected. This enables you to quickly add a post to an existing message stream. When you "post" the post, it is filed in the same folder as the item to which the task is linked.

This button also works in Task View. You might find yourself reviewing your task list when a spontaneous conversation begins with a co-worker about one of your tasks. If you select the task in Task View by clicking on it, then click "Post to stream," a new post window will be presented with the same Conversation as the message to which the task is linked. When finished, this post will be filed in the folder that contains the message to which the task is linked.

Mail to stream

A rectangular button with a blue border and the text "Mail to stream" in blue.

Select an email or post in an email folder. Click "Mail to stream." A new email is created with the same Conversation as the item selected. Because email does this automatically when you Reply or Forward an email, this is more typically used when you have created a post, for example notes from a phone call, and you want to email someone about the call and use the Conversation to connect the messages.

This button also works in Task View. If you select a task by clicking on it, then click "Mail to stream," a new mail is created with the same Conversation as the item to which the task is linked. When you send the mail, it will be filed in the same folder as the item to which the task is linked.

Register License Key

A rectangular button with a blue border and the text "Register License Key" in blue.

This enables you to register your licensed copy of Postream. This button disappears from the toolbar after you register your copy.

Start Vacuum

A rectangular button with a blue border and the text "Start Vacuum" in blue.

The Vacuum cleans Postream's database, optimizing performance. This does not need to be used often, but if you've been using Postream for awhile and you feel it's beginning to perform a little slower, clicking the "Start Vacuum" button should speed things up again. When you click the "Start Vacuum" button, it will change to "Stop Vacuum" while the Vacuum is running and status buttons will display in the Postream toolbar.

You can continue to do other things while the Vacuum works in the background. If you click "Stop Vacuum" while the Vacuum is running, a window will appear that asks, "Vacuuming is already in progress. Do you wish to stop it?" If you click "Yes," the Vacuum will resume where it left off the next time you click "Start Vacuum."

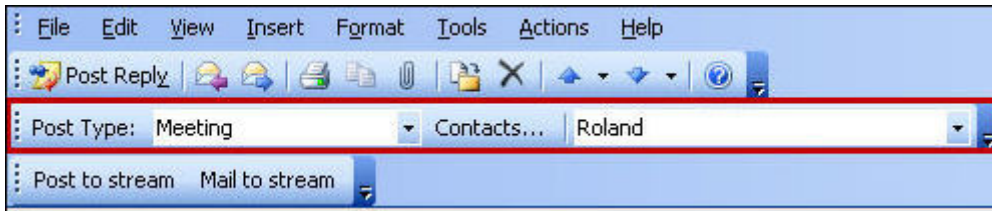
Postream Help

A rectangular button with a blue border and the text "Postream Help" in blue.

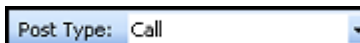
This provides access to Postream's integrated Help system.

Post Type Toolbar in Outlook Posts

Poststream adds the following Post Type toolbar (highlighted) to the Outlook post window. The functions of the toolbar buttons are described below.



Post Type



This drop-down list lets you define the type of post you are saving. By default, this list displays "Other." Click the down-arrow to display the list, and you can choose from Call, Meeting, Instant Message, Follow Up, or Other.

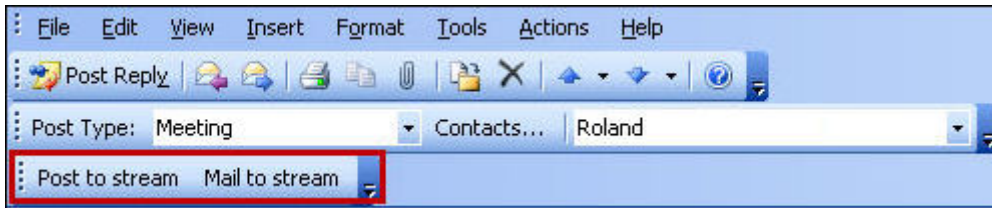
Contacts...



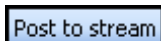
This drop-down list links selected Outlook Contact(s) to a post.

Post Task Toolbar in Outlook Posts

Poststream adds the following Task toolbar (highlighted) to the Outlook post window. The functions of the toolbar buttons are described below.

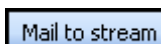


Post to stream



Creates a new post with the same Conversation as the original post. The new post will also be filed in the same folder as the original post.

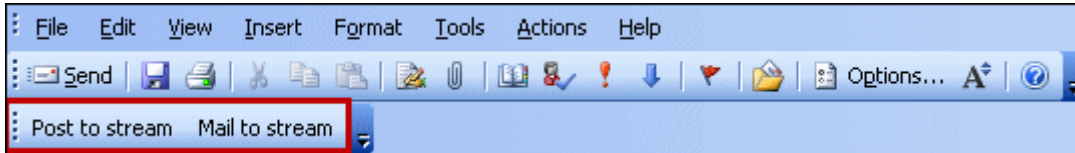
Mail to stream



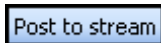
Creates a new email with the same Conversation as the original post. This email will also be filed in the same folder as the original post.

Post Task Toolbar in Emails

Poststream adds the following Task toolbar (highlighted) to the Outlook email window. The functions of the toolbar buttons are described below.

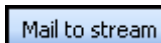


Post to stream



Creates a new post with the same Conversation as the original email. This post will also be filed in the same folder as the original email.

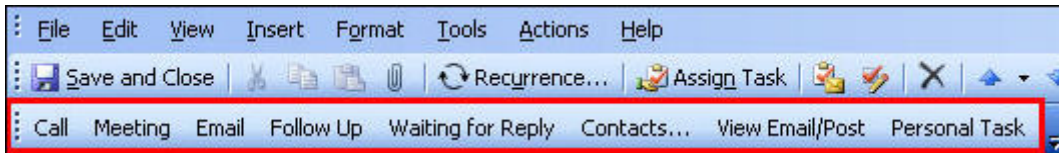
Mail to stream



Creates a new email with the same Conversation as the original email. Emails do this automatically when you Reply or Forward, but it can also be useful to create a new email in the message stream with all the RE's and FW's removed, and without copying the previous emails in the text field. This email will be filed in the same folder as original email.

Post Task Toolbar in Outlook Tasks

Poststream adds the following Task toolbar (highlighted) to the Outlook task window. The functions of the toolbar buttons are described below.



Call



Enters "Call" in the Subject field of the task. When reviewing your tasks, if you click on the "Subject" column heading in Task View, all your "Call" tasks will be grouped together.

Meeting



Enters "Meeting" in the Subject field of the task. This is handy in the workplace when you plan to discuss something with somebody in person but don't want to schedule something formally on your calendar.

Email




Enters "Email" in the Subject field of the task. An "Email" task might be linked to a Call or Meeting post when you want to update someone on what happened with the call or meeting. In this case, if the task or the message it is linked to is selected, clicking "Mail to stream" creates an email with the same Conversation as the post.

Follow Up




Enters "Follow Up" in the Subject field of the task.

Waiting for Reply

A rectangular button with a blue gradient and a black border, containing the text "Waiting for Reply" in a sans-serif font.


Enters "Waiting for Reply" in the Subject field of the task. This is handy when you've sent an email to someone and need to hear back from them.

Contacts...

A rectangular button with a blue gradient and a black border, containing the text "Contacts..." in a sans-serif font.

This links Outlook Contacts to a task. Because it presents the same dialog box that you are presented with when you select names for an email, it's an easier way to add Contacts to a task than the standard "Contacts..." button at the bottom of the Task window.

View Email/Post

A rectangular button with a blue gradient and a black border, containing the text "View Email/Post" in a sans-serif font.

With a task selected, clicking this button displays the post or email to which the task is linked.

Personal Task

A rectangular button with a blue gradient and a black border, containing the text "Personal Task" in a sans-serif font.

Clicking this button enters "Personal" in the Categories field of the task. If you have created a separate *Personal Tasks* view as described in this User Guide under "Other useful tidbits/Personal Tasks," these tasks will be displayed separately from your business tasks.

Other Useful Hints

Following are a number of ways to use existing Outlook capabilities to make your Postream add-on even more useful.

Other Ways to Customize the Task List View

- There are other unique Postream column headings available for the Task List View that you may add with the Field Chooser. "PostType" shows you the type of post/email to which the task is linked. "PostContact" displays the contact(s) listed in the Contacts field of the post. If the task is linked to an email, it displays the sender of the email. Be sure you have selected "User-defined fields in folder" in the list box at the top of the Field Chooser window in order to access these column headings.
- The items in the Task List View can be sorted by clicking on the column headings. If you click on PostFolder, it will sort the items by folder. If your folders correspond to your projects, it's an easy way to see all the pending tasks you have for a particular project.
- When reviewing their tasks for the day, many people prefer to only see tasks that are due that day or earlier (overdue). It's easy to make this change to the Active Tasks view.
 1. While in the Task View with Active Tasks selected (you select it in the Navigator bar), go to Outlook's main menu and click "*View/Arrange by/Current view/Customize current view*". The "Customize View: Active Tasks" window opens.
 2. Click "Filter," then click the "Advanced" tab.
 3. Under *Define more criteria*, click *Field button/Frequently used fields/Due Date*.
 4. In the *Condition* field, select *On or before*.
 5. In the *Value* field, type "Today".
 6. Click "Add to list." Click *OK* in the *Filter* window, then click *OK* in the *Customize View:Active Tasks* window. Now the window only displays tasks that are due on or before today.
 7. If you want to see tasks that are due in the coming week, select *Next Seven Days* under *Current View* in the Navigation Pane

8. If you want to see all your active tasks, select *Detailed List* under Current View, then select the *Due Date* column heading to sort by due date.

Displaying Posts/Emails with Linked Tasks Differently than Unread Emails

This takes a few minutes, but when you're done you can display messages with linked tasks in any color, font, and font size you want.

1. In Mail View (your email and folders displayed), Outlook's Edit menu, then click *Categories*.
2. In the Categories dialog box, click the "Master Category List..." button.
3. Under New category, type "Postream Task," (be sure to include the space), then click Add.
4. Click OK in the Master category list dialog box, then click OK in the Categories dialog box.
5. On the main Outlook toolbar, click *View/Arrange By/Current View/Customize Current View*.
6. In the "Customize View" box, click *Automatic formatting...* Click *Add*. In the *Name* box, type "Postream Task."
7. Click *Font*. Under *Color*, click *Teal*, or any other color you'd like to use to distinguish items with tasks attached. Click OK.
8. Click *Condition*. Select the *More choices* tab. Click *Categories*. Check the *Postream Task* box. Click OK.
9. Click OK in the *Automatic Formatting* box. Click OK in the *Customize View: Postream* box. Click Close in the *Custom View Organizer*.

Now, any messages with tasks attached will be displayed in Teal, or whatever color you chose in step #7. To change this color, repeat this procedure beginning at step #5.

Personal Tasks

Using existing Outlook mechanisms, it's easy to create a separate list for your personal tasks.

1. Go to the Task List View, then on the main menu select *View/Arrange By/Current View/Define Views*. You are presented with the *Custom View Organizer*.
2. Click the "New..." button. In *Name of new View*, type "Personal Tasks." Under *Can be used on*, select *All task folders*. Click OK.
3. In the "Customize View" window, click *Filter*, and in the Filter dialog box select the *Advanced* tab.
4. Under *Define more criteria*, drop-down the *Field* menu. Select *Frequently used fields*, then slide your mouse over and click on *Categories*. In the *Value* field, type "Personal". Click *Add to List*. Click OK. Click "OK" in the "Customize View" window. Click "Close" in the "Custom View Organizer."
5. Under *Current View* in the Navigation Pane of the task window, you will now see a new view listed—*Personal Tasks*. But there's nothing listed there.
6. Click the "New Task" button, or press Ctrl-N to generate a dialog box for a new task.
7. In the Subject field, type "Get wine for dinner!" Then click *Personal Task* on the Postream Task Toolbar. This automatically enters *Personal* in the Categories field of the task dialog box. Click Save and Close. The task appears on your Personal Tasks list.

Filtering Personal Tasks from your Business Task List

Now we can set it up so that personal tasks do not appear in the list of your Active Tasks. Under *Current View* in the Navigation Pane, click “Active Tasks.” On the main menu, select *View/Arrange By/Current View/Customize Current View*.

1. Click *Filter* and click the *Advanced* tab.
2. Click the “Field” button, then click “Frequently Used Fields”, then click “Categories.”
3. Under *Condition*, select *Doesn't contain*.
4. In the *Value* field, type “Personal.”
5. Click *Add to list*. Click OK.

The personal task disappears from your Active Tasks list, and now you're set to view business and personal tasks separately.

Using an Outlook Search Folder to Track Conversations

You can also use an Outlook Search Folder to track Conversations across folders. It takes a little time to set up, but it offers the added advantage of looking just like any other email folder, and includes the Preview Pane, so quickly reviewing multiple messages in a stream can be quicker.

Creating the Monthly Mail Search Folder

In the Mail view, Search Folders are probably located at the bottom of Outlook's Navigation Pane. In any case, a little looking in the Navigation Pane should enable you to find them. In some cases, Outlook comes with some pre-defined Search Folders.

To create a new Search Folder, right-click on the folder named “Search Folders,” and in the menu that appears click “New Search Folder...” The “New Search Folder” box appears.

Scroll all the way to the bottom in the list under “Select a Search Folder” and click “Create a custom Search Folder”. Then, under “Customize Search Folder” click “Choose...”. The “Custom Search Folder” box appears.

In the “Name” box, type “Monthly Mail”. Under “Mail from these folders will be included in this Search Folder” box, click the “Browse...” button. In the tree of email folders that appears, click the very top-level folder, and be sure the “Search subfolders” box is checked. It's important that you designate this top-level folder, and search all its sub-folders, so that items with the same Conversation can be found no matter what folder they have been filed in.

Click the “Criteria...” button and the “Search Folder Criteria” box appears. Click the “Advanced” tab.

On the “Advanced” page, click the down-arrow on the “Field” button. In the menu that appears, hold your cursor over “Frequently-used fields”, then slide over to the second-level menu and click “Sent”. Drop down the menu under “Condition” and click “last month”. Next, click the “Add to List” button. “Sent Last Month” is added to the list under “Find items that match these criteria.”

Repeat this procedure again exactly, starting by clicking the down-arrow in the “Field” button, only this time add “Sent This Month” to the list under “Find items that match these criteria.”

Click “OK” in the “Search Folder Criteria” box, then click “OK” in the “Custom Search Folder” box, then click “OK” in the “New Search Folder” box. The Monthly Mail Search Folder will appear and begin filling with mail that meets the search criteria. In the Navigator, it will appear as a sub-folder of “Search folders.” Click it to select it, and you'll see it contains all the mail Sent (either by you or someone else) for this month and last month.

Adding the “Conversation” column to the Monthly Mail Search Folder

Position your cursor over “Subject” in the column heading row of the Monthly Mail Search Folder, click and hold the left-mouse button, then drag “Subject” down until an “X” appears over it and release the left-mouse button. Now, right-mouse click anywhere over the column headings and click Field Chooser. The Field Chooser window appears.

In the list box at the top of the Field Chooser window, select the “Frequently-used fields” list. In the list of column headings that appear, drag-and-drop “Conversation” on to the column heading row of the Monthly Mail Search Folder (A “Conversation” in Outlook is the Subject with things like “FW:” and “RE:” removed).

Hold your cursor over the “Conversation” column heading and left-mouse click. Your emails are now sorted alphabetically by Conversation. If you did this with “Subject”, the messages with “FW:” and “RE:” would be alphabetically sorted in different places, and you wouldn’t be able to see the whole “stream” of the Conversation.

To make it easily accessible, drag-and-drop the “Monthly Mail” Search Folder into the “Favorite Folders” section at the top of the Navigation Pane.

Using the Monthly Mail Search Folder with Linked Tasks

The Conversation of the items you created for this Getting Started Guide is “Project X,” and we’ve just sorted the items in the Monthly Mail Search Folder alphabetically. To quickly go to those items with a Conversation beginning in “P”, just select any item in the Search Folder by clicking on it, then press “P” on your keyboard—this will take you to the first item with a Conversation that begins with “P”. Scroll until you come to the “Project X” conversation, and you will see all of the “Project X” items sorted together. Note that the item with the task linked will be bolded.

Seeing what folder individual items are in can be handy when a thread becomes long and items end up in different folders. To do this, use the Field Chooser again. This time, select “All Mail fields” in the list box at the top of the Field Chooser window, then drag-and-drop the “In Folder” column heading on to the column headings row of the Search Folder.

Troubleshooting

The “Contacts...” Button Won’t Work (or other problems with the “Contacts...” and “PostType” buttons in the Post and Task)

This most frequently happens when “Use Microsoft Office Word...” to edit email messages is checked. Click Tools/Options on Outlook’s main menu bar. In the “Options” box click the Mail Format tab. Make sure “Use Microsoft Office Word...” to edit or read email messages is not checked. Then, select either HTML or Rich Text in the “Compose in this message format.” menu.

Winmail.dat Attachments

There are some instances, when sending mail with an attachment to a non-Outlook user, that he/she might not be able to open the attachment because it is in winmail.dat format. This can be avoided by sending the message in Plain Text mode. There are a couple of ways to do this: basis:

- You can designate people individually to receive emails in Plain Text format. To do this, go to your Outlook contacts by clicking the Contacts icon at the bottom of the Outlook Navigation Pane, or by clicking Go/Contacts on the main Outlook menu. Open the Contacts’ card to whom you need to send messages in Plain Text format. Right-mouse click on the Contact’s email address in the upper right-hand corner of the card and click “Outlook properties” in the menu that appears. For “Internet Format,” select “Send Plain Text only.” Click OK. Then click “Save and Close” on the contact card. You can continue to compose your messages in HTML, but this recipient will receive them in Plain Text.
- If you get a reply from an email recipient who says he/she cannot read the attachment, open the original email (it’s either in your Sent folder or in the folder in which you filed it), and on the menu bar in the email click Actions/Resend this Message. In the “To” field, right-mouse click on the name of the addressee who had the problem, click Outlook Properties, and for Internet Format select “Send Plain Text only.” Click OK. Delete the other people to whom this email was addressed and resend to this individual only.

Outlook Takes a Long Time to Start

When Outlook first opens, Postream does a lot of work to enable it to track messages in all your personal folders. The more folders you have, the longer this takes. This is only done once, at startup, and after that you should notice no difference in the speed with which Outlook operates.

If you want to reduce this startup time, see if there are some older personal folders that you can delete.

Another way to help with this, and with Outlook performance generally, is to say “Yes” if Outlook asks at startup, “Would you like to Auto-Archive older items now?”

Task List View Doesn’t Show New Task Row

While in Task View, on Outlook’s main menu, click View/Arrange by/Current View/Customize Current View. In the “Customize View” dialog box, click “Other Settings.” In the “Other Settings” dialog box, under “Column headings and rows,” check “Show ‘new item’ row.” Click OK in the “Other Settings” dialog box, then click OK in the “Customize View” dialog box.

Can’t Edit Post that I’ve Already Posted

Open the post. On the main menu of the post, click Edit, then click Revise Contents.

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