

CHAPTER 15



STAYING ORGANIZED WITH THE OUTLOOK JOURNAL

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USING OUTLOOK'S JOURNAL

Outlook's journal is a lot like a diary and contains a record of your daily activities. Unlike a diary, it's somewhat limited to recording specific records, such as email you send and receive, phone calls you make, and documents you work on. Although it does a good job of automatically tracking your usage of Microsoft Office applications, you must record journal entries for other events or applications yourself.

Among the activities you can automatically record in the journal are

- Email you send and receive to selected contacts
- Task requests and responses
- Meeting requests, responses, and cancellations
- Telephone calls you initiate to a contact
- Office documents you work on

By automatically recording all documents you work on, all email sent to specific contacts, and phone calls made, the journal keeps logs of your activity. This is particularly useful to anyone who needs to know how long she worked on a document or spent on a phone call because the journal tracks the elapsed time along with the event.

When you manually create new journal entries, you're limited in the entry types you can choose. The predefined entry types cover basic business events, such as

- Letters, documents, and faxes you send or receive
- Telephone calls and conversations
- Notes you take
- Remote sessions you participate in

NOTE

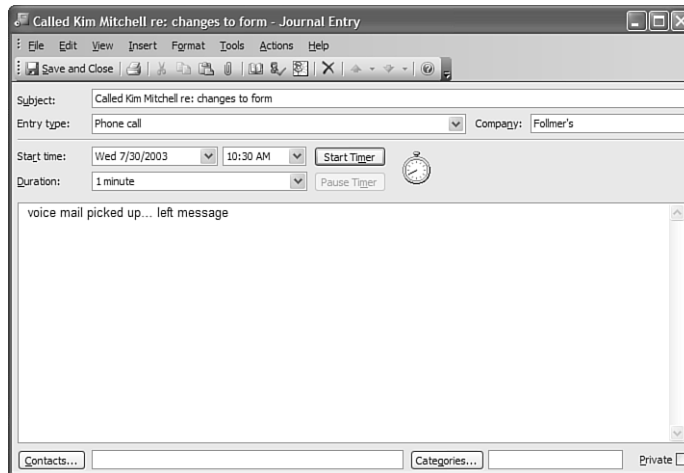
Even though you can't create new entry types in the form, you can edit the Registry to add additional types to the drop-down list. See "Creating Custom Journal Entry Types" later in this chapter to learn how to create your own journal entry types.

The journal form (see Figure 15.1) contains only a few basic fields:

- Subject
- Entry Type
- Company
- Start Time (includes time and date fields)
- Duration
- Notes

After you've entered the information in the fields, press the **S**ave and Close button and your journal item is finished.

Figure 15.1
Enter a subject and notes about the event in the journal form and save.



After you create journal entries, you can use Views to organize your journal:

- By Entry Type—The default view; based on Timeline view with items grouped by entry type
- By Contact—Based on Timeline view and grouped by contact
- By Category—Based on Timeline view and grouped by category
- Entry List—Based on the Table view format; initially sorted by creation date
- Last Seven Days—Based on the Table view format; filtered to display entries created within the past seven days
- Phone Calls—Based on a Table view, filtered to display only phone calls

You might prefer to view your journal in a traditional calendar format. If so, you can create a custom view using a day/week/month format layout.

TIP

Journal can display the week numbers in a Timeline view. Right-click on the bar where the month and year are displayed, choose **O**ther Settings, and then check the box in the Scales section to **S**how Week Numbers.

WHO NEEDS TO USE THE JOURNAL

Although many people don't use the journal, doing so offers you two advantages. The first is that because the journal can automatically record phone calls, email, task and meeting requests, and responses for selected contacts, you can easily go back and verify that you sent an email or your colleague accepted an invitation.

Second, the journal records the duration you worked on a task. If you bill by the hour or just want to know how long you spent writing a report, the journal can tell you. You don't have to remember to set a timer; you need only select the option to automatically record all files created using specific Office applications.

One reason many people give for not using the journal is that journaling causes your mailbox store to grow very large. When the journal automatically creates entries for many of your contacts and for all Office documents, you could end up with several hundred entries at the end of each week, many of which offer little or no additional value. Unless you use AutoArchive to clean out the journal regularly, you might have thousands of items in the journal.

WHEN THE JOURNAL IS HELPFUL

You can let the journal automatically create records for Office documents or Outlook items you create. Along with creating an automatic journal item for you, it also records the time you spent working on the documents.

Although journal entries aren't automatically created for all activities you might want to include in your journal, it takes little effort to create journal entries for all the activities you do. If you need to go back a few months and find a document you worked on, it's often easier to look in the journal and use views or Outlook's advanced find to find the journal entry than it is to search your computer's hard drive for filenames you can't remember.

WORKING WITH THE JOURNAL FOLDER

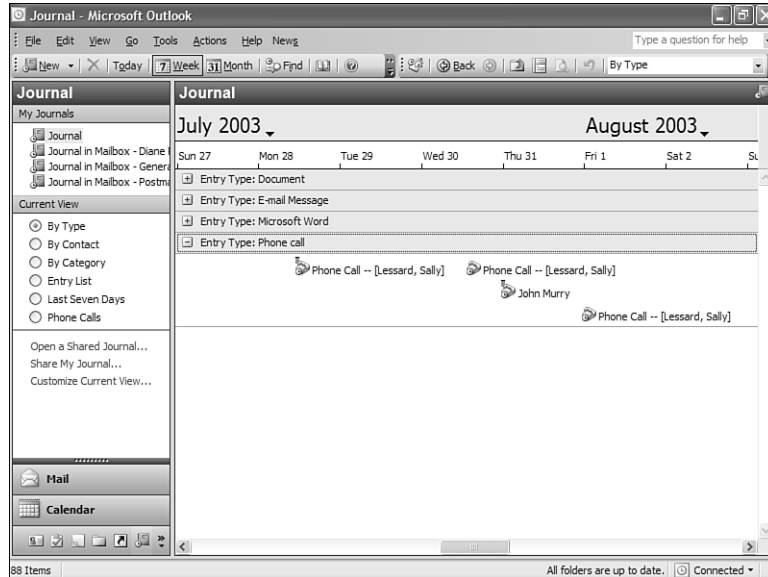
When you open the Journal folder, you'll see the default By Type view: a timeline grouped by entry type. This view has the date running left to right across the top of the pane, with the journal entries listed under the dates. The Timeline view default shows seven days, as shown in Figure 15.2.

Along with scrolling, you can right-click on the row with the month and year to display the date picker or, on the date scale, choose Go to Date to move around the journal. Although the Outlook bar has a link for opening shared journals, only Exchange Server users can open and use shared Journal folders.

Use the View menu to select different views of your Journal folder, including timelines grouped By Contact or By Category and Table views showing all items, or filtered by the last seven days, or limit the display to phone calls only.

The Reading Pane is turned off on the Journal folder by default; however, you can turn it on using the View, Reading Pane menu selection. You can use the Reading Pane with any view, including the Timeline view, and you can see all the journal fields in the Reading Pane. For security reasons, you can't open shortcuts on the journal item from the Reading Pane; you have to open the journal entry first. When the actual file is attached to the journal entry, you can open it from the Reading Pane. In most views, you'll want the Reading Pane on the bottom of the window to maximize the viewing area for Timeline views.

Figure 15.2
The default view for
the Journal folder is a
Timeline view.



USING VIEWS

The journal comes with six predefined views, using timeline or table layouts. You can customize these views or create your own custom views. You aren't limited to using Timeline or Table views with the journal. Day/Week/Month views also work well with the journal, although Icon and Card views do not.

The following are Timeline views for grouping the journal entries:

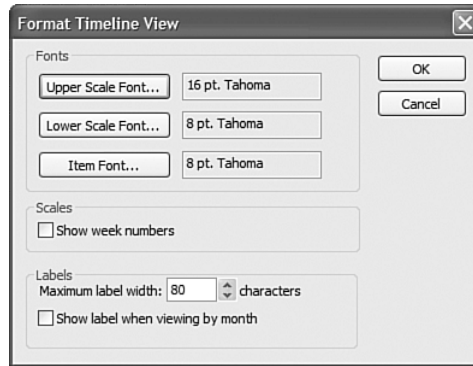
- By Entry type
- By Contact
- By Category

Each of these views defaults to showing the journaled items for the week. You can change this to one day (segmented by the hour) or one month by pressing the Day or Month toolbar button. You can return to a seven-day view by clicking the Week button.

One of the first changes you might want to make in a Timeline view is reducing the size of the font used for the month and year. Right-click on the bar where the month and year are displayed, choose Other Settings, and then adjust the size of the Upper Scale Font in the Format Timeline View dialog box, as shown in Figure 15.3.

Other options you can change from the Format Timeline View dialog box include showing week numbers and changing the maximum width of the labels displayed with the icons. You can also control whether the icon label is displayed when viewing a month in the timeline.

Figure 15.3
Change the timeline display options using the Format Timeline View dialog box.



The remaining preconfigured views use a Table view with filters controlling what you see:

- Entry List—No filter used
- Last Seven Days—Filtered to display entries created within the past seven days
- Phone Calls—Filtered to display only phone calls

You can customize any of these views or create new views using your own criteria.

NOTE

If you create entry types for incoming and outgoing phone calls, as described in “Creating Custom Journal Entry Types,” you’ll have to modify the Phone Call view to show the new entry types.

CUSTOMIZING THE JOURNAL VIEW

The journal comes with several views, all of which are customizable. Right-click on the top row of the journal and choose Customize Current View. The Custom View Organizer opens, enabling you to customize the current view to your liking. If you want to restore the default settings for the view, select the Reset Current View button at the bottom of the dialog box.

NOTE

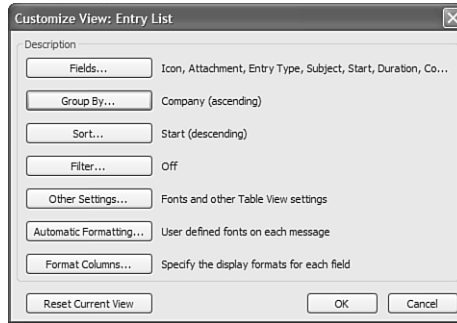
When a button or option is dimmed, it isn’t available for the type of view you’re creating or modifying.

If you don’t like the predefined views, or need more views, you can create new views. To create a new view:

1. Select View, Arrange By, Current View, Define Views to open the Custom View Organizer.
2. Select New to create a new view.

3. Enter a name for your view and select the type of view you want to create. Day/Week/Month makes a nice journal view, but Icon and Card views aren't very useful.
4. The Customize View dialog box, shown in Figure 15.4, opens and you can set the options you want to see in the view.

Figure 15.4
Modify your views using the Customize View dialog box.



When you finish customizing the view, select **Apply View** to use the new view immediately. You can apply it at any time by selecting the view's name from the **Current View** toolbar button or **V**iew, **A**rrange By, **C**urrent **V**iew menu selection.

TIP

Instead of creating a new view from scratch, you can select an existing view in the Custom View Organizer, select **C**opy to create a copy of a view, and then choose **M**odify to edit it.

→ For more information about using views and creating custom views, see "Creating Views and Print Styles," p. 87.

TIP

Contacts provide an additional way to view journal entries: from the Activities tab of an opened Contacts form. In fact, many frequent journal users never use the Journal folder; they use only the Activities tab of the contact.

SETTING UP AUTOMATIC EMAIL JOURNALING

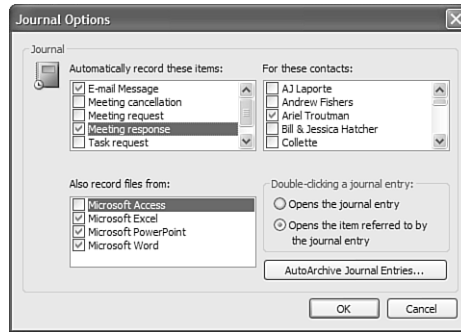
You can configure the journal to track all emails you send to specific people, track the documents you work on, and track meeting and task requests and responses.

Journaling is disabled by default. When you first select the Journal folder, a dialog asks whether you want to enable journaling. If you only need to track email and other Outlook items, the Activities tab can be used instead of the journal, and you should select **N**o.

CONFIGURING JOURNAL OPTIONS

If you choose Yes, the Journal Options dialog box opens, as shown in Figure 15.5. You can change your configuration for journal options at any time by choosing **T**ools, **O**ptions, Preferences tab, **J**ournal Options.

Figure 15.5
Use the Journal Options dialog box to select the activities you want to automatically record in the journal.



Configuring journal options is straightforward. Add a check for the contacts, document types, and meeting and task requests for the journal entries you want automatically created.

CAUTION

Automatic journal settings apply to the user logon, not to your Outlook profile. When you share your computer logon with other people, changes they make to the journal settings affect you as well.

The Journal Options dialog box contains three sections used to configure automatic recording of your activities. The selections you make in the top sections act as a filter to limit what is automatically journaled:

- **Automatically Record These Items**—Select the activities that you want to record from this list
- **For These Contacts**—Only activities involving the selected contacts are recorded

For example, journal entries for **Automatically Record These Items** selections are created only if the contact is selected in the **For These Contacts** list box, not for every person you exchange email with.

NOTE

To be listed in the **For These Contacts** list, a contact must be stored in your default Contacts folder. Contents of other Contacts folders aren't listed.

When you add a new name to your Contacts folder, the name is added to the **For These Contacts** list, but is left unchecked. You must open the Journal Options dialog box and select the new contact if you want to automatically journal messages to and from your new contact.

In addition to the items checked in the Automatically Record These Items list, journal entries are automatically created for phone calls to a contact selected in the For These Contacts list when you initiate a call to the contact using the Actions, Call Contact menu on an open Contacts form.

The third section, Also Record Files From, contains the list of document types that Outlook is capable of tracking and recording.

The remaining section found on this dialog box contains the settings for the default action that occurs when you double-click on a journal entry. The choices are Opens the Journal Entry or Opens the Item Referred to by the Journal Entry.

The final setting configured from this dialog box is your AutoArchive settings. You should configure AutoArchive Journal Settings if you're journaling activities for a large number of contacts; otherwise, your message store may grow too large.



Do you want to remove programs from these lists? See "Prevent Changes to Automatic Journaling Settings" in the "Troubleshooting" section at the end of this chapter.

CONFIGURING CONTACTS FOR AUTOMATIC JOURNALING

You typically use the Tools, Options, Journal Options dialog box to enable contacts for automatic journaling. However, you can also do this from the Contacts form's All Fields tab or when using the Phone List view.

Using views to enable or disable your contacts for automatic journaling is the easiest way to set or change the status for a large number of contacts:

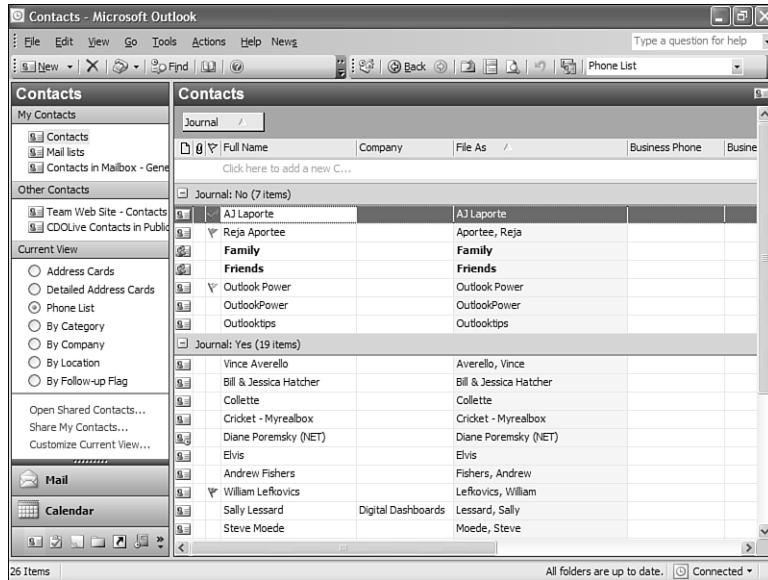
1. Open your Contacts folder and choose Phone List view.
2. Scroll to the right. The Journal field is the next to the last column.
3. Add a check mark in the Journal field for each contact you want to automatically journal; remove the check mark to stop automatic journaling for a contact.

If you have a large number of contacts to change, right-click on the row of field names, choose the Group By Box, and then drag the Journal field name to the Group By box above the row of field names. You can now select and drag multiple contacts between the Journal: No and Journal: Yes groupings, as shown in Figure 15.6.

To enable journaling using the All Fields tab for all new contacts:

1. Open a new contact to the All Fields tab and choose All Contact Fields in the Select From field.
2. Scroll the list of fields and locate Journal; enter Yes as Journal's value.
3. Open Tools, Forms, and then choose Publish Form As.
4. Type a name for the form in the Display name box. Click Publish, and then close the open form, choosing No when asked if you want to save it.
5. Next, make the new form your default Contacts form by right-clicking on the Contacts folder and choosing Properties from the shortcut menu.

Figure 15.6
Change the journal setting for many contacts at once by grouping contacts by the journal field.



6. On the General tab, find the When Posting to This Folder, Use list, select the form you just published, and then click OK.

Now, all new contacts you create will use the form you published with journaling enabled. If you want to stop journaling, repeat the last two steps in the preceding list and select the IPM.Contacts form instead.

USING JOURNAL'S OTHER TRACKING CAPABILITIES

Outlook's journal isn't limited to tracking email entries for you; you can easily create your own entries for anything you want to keep in your journal. Some people like to create an entry when they complete home and car repairs or maintenance or visit their doctor. Even though Outlook doesn't have entry types for these items, you can easily create new entry types that meet your unique needs. You might also want to create a second (or third) Journal folder with a different archive setting on each. You may want to keep business and personal entries separate, or archive your business entries more often than you archive home repairs.

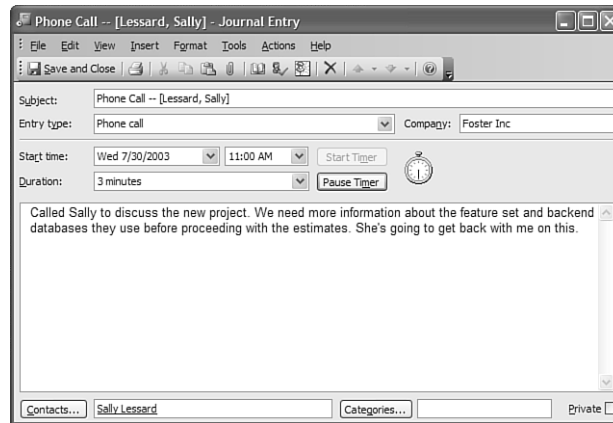
TRACKING TELEPHONE CALLS AUTOMATICALLY

Although Phone Call isn't listed in the Automatically Record These Items list, when you initiate a call using the Actions, Call contact menu and the contact is in the For These Contacts list, a new journal form loads automatically.

When you have the journal automatically creating journal entries, the journal form's fields pull name and company data from the Contacts form, the time and date fields update to the

current time and date, and the timer starts, as shown in Figure 15.7. You don't have to do anything except type notes and save the journal item when the call ends.

Figure 15.7
Outlook automatically creates a journal entry for any phone call initiated using Outlook's phone dialer.



The format used in the Subject field is “Phone Call — [contact name]”; if the contact’s Company field contains an entry, the Company field on the journal form is completed. The contact also links to the journal item, permitting you to locate the journal entry from the contact’s Activities tab.



Are journal items missing from the contact’s Activities tab? See “Reconnecting Journal Entries to Contacts” in the “Troubleshooting” section at the end of this chapter.

NOTE

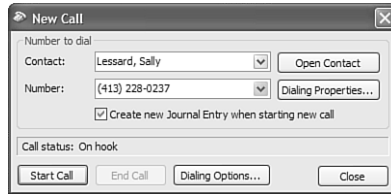
If you’d like Phone Call to display in the Automatically Record These Items list, you can edit the Registry to display it. Open the Registry Editor, navigate to the HKEY_CURRENT_USER\Software\Microsoft\Shared Tools\Outlook\Journaling\Phone Call key, and change the AutoJournalled value to 1.

→ See Appendix E if you need help editing the Registry.

When you make a phone call using Actions, Call Contact to a contact that isn’t already set up for automatic journaling, a journal item isn’t created for you unless you add a check to the Create New Journal Entry When Starting New Call check box (see Figure 15.8). If you decide after you begin the call that you need it in your journal, you can open a journal form and fill out all the fields.

You can call a number that isn’t in Contacts by typing it into the New Call dialog box. The call is automatically journaled for you when you check Create New Journal Entry when starting a new call.

Figure 15.8
Use Outlook's New Call dialog box to place calls using phone numbers stored in your contacts.



NOTE

You might notice that the Create New Journal Entry When Starting New Call check box is sometimes already checked when you start a call and the contact isn't in your For These Contacts list. This happens when you make several calls in a row without closing the New Call dialog box. You must uncheck the check box to prevent the call from being journaled.

CREATING AUTOMATIC JOURNAL ITEMS FOR OTHER APPLICATIONS

Not all applications you might want to create journal entries for are listed in the Journal Options dialog box. However, you can add any program to the list of entry types on the journal form by editing the Registry.

→ For more about using the Registry to manually create entry types, see “Creating Custom Journal Entry Types,” p. 375, for instructions.

When you need a journal entry for an application that isn't listed on the Also Record Files From list, you'll need to create a journal entry and then use the journal form's Insert menu to insert a shortcut to the document.

If you're inserting documents or files, use the Insert button on the toolbar. You can also use the Insert menu and choose among inserting files, Outlook items, or OLE objects.

INSERTING FILES

When you insert file attachments, you have four Insert options:

- **Insert**—The default setting; inserts the file as an attachment.
- **Insert as Text**—Inserts the file into the note body as text and is useful only for text files.
- **Insert as Attachment**—Inserts the file as an attachment.
- **Insert as Hyperlink**—Inserts a shortcut to the file and is the default when journal entries are created automatically.

You should avoid using Insert or Insert as Attachment, especially with larger files; otherwise, your message store might grow very large. Using the Insert as Hyperlink option keeps the size of your message store smaller and is the default when a journal entry is created automatically. Insert as Hyperlink is the recommended method in most situations.

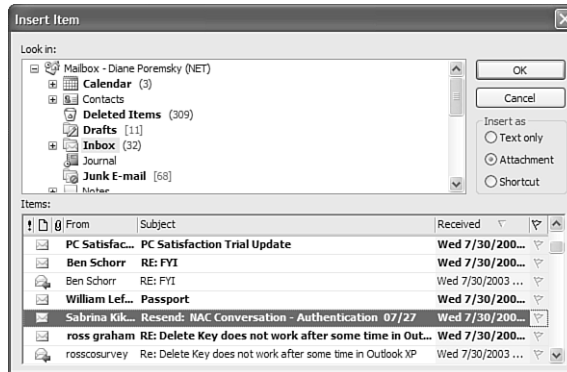
TIP

When you use multiple computers, or if you're going to send the journal item to another Outlook user, you'll want to insert files or Outlook items as attachments because shortcuts might not work correctly.

INSERTING OUTLOOK ITEMS

You can also insert any item from Outlook's message store as text only, as attachment, or as a shortcut to the item (see Figure 15.9). In most cases, you'll want to use a shortcut to the item or insert it as text only, instead of duplicating an existing item.

Figure 15.9
Inserting Outlook items in your journal entry helps you locate the items easier.

**INSERTING OLE OBJECTS**

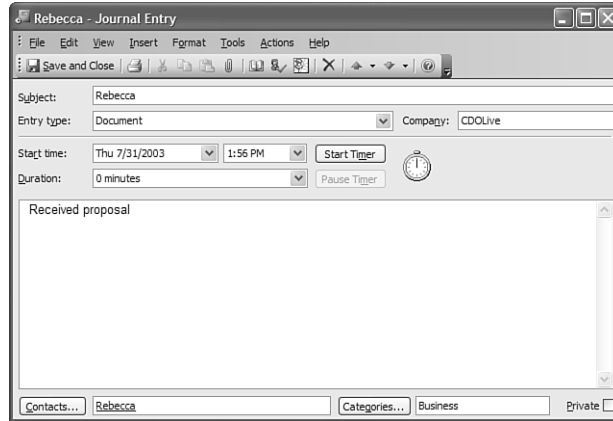
Inserting objects permits you to display and edit most OLE-aware documents in the Notes field of the journal form. You can insert existing documents or create new documents. However, the journal entries are often larger than they would be if you inserted an attachment.

CREATING JOURNAL ITEMS MANUALLY

Although automatic journaling is the easiest and most reliable way to create journal entries, you can create new journal entries yourself. Because the journal supports only the automatic creation of entries from the other Office programs, you might need to create a lot of entries manually:

1. Select **N**ew, Journal Entry to open a new journal form.
2. Enter a **S**ubject and select an Entry type for your new journal entry.
3. Enter the **S**tart time and date.
4. Press the **S**tart **T**imer button if you need to record the duration.
5. Enter notes in the **N**otes field, insert links to attachments, and associate **C**ontacts or **C**ategories with the journal item (see Figure 15.10).

Figure 15.10
The journal form fields include subject, time and date, company, and entry type.



- When finished, click Save and Close. The timer stops and the duration field updates to the elapsed time.

MANUALLY JOURNALING PHONE CALLS

Even when you don't use Outlook's dialer to place your calls, you can still journal your incoming and outgoing phone calls. Open a new journal form using the **File, New, Journal Entry** menu or **Ctrl+Shift+J**, and complete the form with information about your phone call. If you need to differentiate between incoming and outgoing calls, create custom entry types or use categories.

➔ To learn how to create your own entry types, see "Creating Custom Journal Entry Types," p. 375.

MANUALLY JOURNALING APPOINTMENTS AND TASKS

Appointments and tasks aren't automatically journaled. However, you can create journal entries for these items, with very little typing, by dragging and dropping the calendar or task items to the Journal folder. This creates a new journal entry with the fields already filled in with information taken from the calendar or task item.

For example, when you drag an appointment from your calendar to the journal, you create a new journal entry with the subject of the appointment used for the journal. The start time, duration, contacts, and categories are also the same as on the appointment. A shortcut to the appointment is added to the Notes field of the journal entry. After adding notes about the meeting, you need only save and close the journal entry.

You can also create new journal entries and insert calendar or task items using the **Insert, Item** menu, but you must complete the journal fields yourself.

CREATING CUSTOM JOURNAL ENTRY TYPES

The journal comes with a predefined list of entry types that's limited and might not meet your specific needs. The list isn't editable on the form, and you're restricted to selecting an entry type from the list. Fortunately, because the Entry Type list is stored in the Registry, you can change what you see in the Entry Type drop-down list.

CAUTION

Although the thought of editing the Registry scares many people, it isn't difficult to do. You should always export the section of the Registry you're working on before you begin, just in case you make a mistake.

If you're up to the challenge, open the Registry Editor by selecting Start, **R**un and typing **regedit** in the box. Click OK.

➔ For more information on editing your registry, see "Working with the Windows Registry," p. 935.

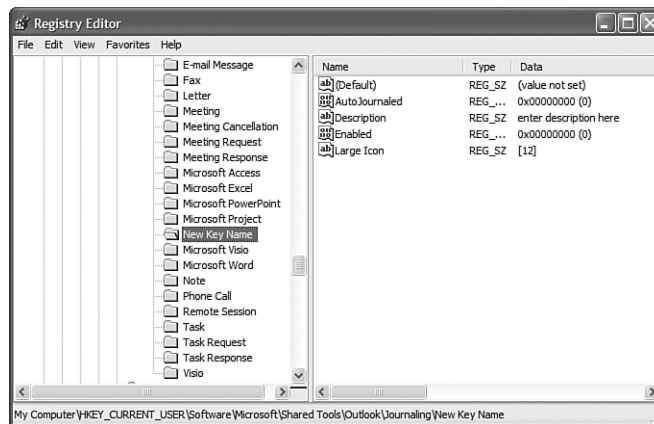
Once you have the Registry Editor open, navigate to this key:

```
HKEY_CURRENT_USER\Software\Microsoft\Shared Tools\Outlook\Journaling
```

If this is your first time using the Registry Editor, press the plus sign (+) beside HKEY_CURRENT_USER to expand the list. Find and expand Software, Microsoft, Shared Tools, then Outlook, and finally, Journaling. After you expand the Journaling key, your Registry Editor should look like the screen in Figure 15.11.

Figure 15.11

Create new journal entry types by adding Registry keys. If you want to remove some entry types, you can delete them from the Registry.



Now you're ready to add your new entry type:

1. As a precaution, export the keys by right-clicking on **Journaling** and selecting **Export**. The **Export Registry** dialog should open to your **My Documents** folder. If not, select it in the **Places Bar**. Enter a filename and save. If you make a mistake and want to restore the original entry types, find the **.reg** file you created and double-click it.

2. Right-click on `Journaling` again and choose `New, Key`. Type a name for your new key.
3. Now you need to add values to your new key. You'll need a minimum of two values: `Description` and `Large Icon`. Right-click in the right side of the Registry Editor and choose `New, String Value`. Type `Description` to replace `New Value #1`. Double-click on `Description` and type the text you want to show in the `Entry Type` field. This doesn't have to match the name of the key, but it should be similar.
4. Repeat step 3, naming the new string value `Large Icon` and entering a value inside square brackets so that the value data looks like `[12]`. This entry controls the icon that displays in the Journal folder. If you look through the other keys, you'll see what numbers represent other icons.
5. Open a new journal form. Your new entry type should be listed in the `Entry Type` drop-down list.
6. Close the Registry Editor.

You probably noticed the other keys under `Journaling`. You can delete the keys for the entries you don't want listed in the `Entry Type` drop-down list. If you delete all the keys, you'll discover `Phone Call` is hard-coded in the journal form. If you don't want the `Phone call` key listed, you'll have to rename it to something you do want listed instead. Add a `Description` string value with whatever text you like, such as `Incoming Phone Call`. You'll also need to delete or rename the `DescriptionID` key.

TIP

After creating your new journal entry keys, right-click on `Journaling` and export the keys. You can use the `.reg` file to change the entry types on other computers.

You might have noticed that there are entries for the other values, such as `AutoJournal` and `Enabled`. These values have no affect on your custom journal entries.

`AutoJournal` is a `DWORD` value that controls whether the entry displays in the `Tools, Options, Journal Options` dialog in the `Automatically Record These Items and Also Record File From` lists. If `AutoJournal` is present, a value of `0` means that it's hidden from the lists, whereas a value of `1` means that it's displayed in one of the lists. `Enabled` with a value `1` means that the box beside the entry is checked; `0` indicates unchecked. Because your custom entry types won't automatically journal, you don't need to create these keys.

TROUBLESHOOTING

RECONNECTING JOURNAL ENTRIES TO CONTACTS

I imported the contents of my old .pst into my new .pst and the journal entries no longer show up under the Activities tab for my contacts. Why is that, and can I fix it without opening each journal item and selecting the contact?



Your first mistake was using Import. Use **File, Open, Outlook Data File** to open your old .pst, and then move the contents to the new personal folders.

Importing from or exporting to a .pst file breaks all the links between Microsoft Outlook items and related contacts because it creates new items. Moving items within a mailbox doesn't break the links because you aren't creating new items, you're just moving them.

After you import items, Outlook doesn't provide a method to reconnect the links to their related contact items, other than to reenter the contact names in the Contacts box.

You have two options. The first is to start over and delete the imported items, open the .pst, and move the items to your current .pst. Deleting the imported entries isn't difficult. You must create a view that shows all items and add, and then sort by, the Modified Date field. The imported items will have the same modified date and you can select and then delete them. You must do this for both the Journal and Contacts folders. Then move the items to the current .pst.

However, if it isn't possible to move the original items, you can use a VBA macro to repair the links for most of your contacts. If you don't know how to write VBA code, that's not a problem either; a subroutine named `ReconnectLinks` is available online. Look for a link to it at <http://www.slipstick.com/addins/journal.htm>.

You might need to update some entries the old-fashioned way by typing in their names, but the majority of the links can be fixed using VBA.

PREVENT CHANGES TO AUTOMATIC JOURNALING SETTINGS

I share my computer with another person and I want to automatically journal all my email, but he doesn't. We have our own profiles in Outlook. How can I prevent him from changing my options?

The easiest way to make everyone happy is to give him his own Windows user account. This isn't always the most convenient method and there are many good reasons why some people don't want separate user profiles. However, as you've discovered, many settings within Outlook are specific to the user account, not Outlook profile specific, and this is one of them.

Not all is lost, however. You can edit the Registry to hide any entry in the Automatically Record These Items list. Open the Registry Editor to `HKEY_CURRENT_USER\Software\Microsoft\Shared Tools\Outlook\Journaling\E-mail Message`. If the `AutoJournaled` value exists, change it to `0`; otherwise, create a new `DWORD` named `AutoJournaled` with a value of `0`.

Now open the Journal Options dialog box. `Email Message` is removed from the Automatically Record These Items list, and as long as the `JournalByContact` value is set to 1, email for the checked contacts is journaled.

This stops others only from disabling the settings using the Journal Options dialog box. You can't prevent them from editing the Registry to disable automatic journaling.

IMPROVING YOUR OUTLOOK

The journal tracks your activities for you by providing a record of messages you've sent or received, calls you've made, and letters you've sent. Along with tracking the calls, the journal includes a duration field so that you can easily see how long you spent on a project. Rebecca owns a consulting business and uses these features to her advantage, resulting in more accurate accounting of the time spent on a project and customer billing.

She keeps all of her contacts in Outlook and when she needs to make a phone call, she uses Outlook to dial the phone. The journal item is created automatically and the duration is logged.

Rebecca has configured Outlook to create automatic entries for Word documents, so she knows how much time she spends creating and editing each document. When Rebecca creates her documents, she always completes the document properties dialog box and enters the contact's name as a keyword. Later, she can sort or group by keyword, and associate the contact with the journal entries. After that, the journal items are listed on the contact's Activities tab.

When Rebecca works with other programs, she creates a journal entry and includes shortcuts to any documents she created. She includes notes on each journal item to remind her exactly what the journal entry is about if the client has questions charges on their bills.

At the end of every month, Rebecca uses a custom view that shows only the items created within the past 30 days. She adds up the time spent for each journaled item, and then prepares the bills to send. As her business grows, she knows she'll need to automate the process and is reviewing some third-party Outlook add-ins she discovered at <http://www.slip-stick.com>. If she doesn't find an add-in that does what she needs, Rebecca found some VBA samples she can use to provide some automation.

Rebecca also uses the journal for personal business, such as house and car repairs, and to record medical and dental information for her family members. She felt it would be easiest to use separate Journal folders for these records—one for repairs and one for medical records—so that they wouldn't be mixed with her business journal. She created custom journal entry types to use, enters detailed notes for each entry, and scans her receipts and inserts them in the journal entry and has a complete record of the work done. When she needs the information, the records are easy to locate and contain all the information in one file. At the end of each year, Rebecca prints out copies the journal entries for home repairs and stores them with her tax records. When it's time to sell the house, she can easily answer buyer's questions about repairs and use the same records to help calculate her capital gains.