

MICROSOFT OUTLOOK 2013

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What Is Outlook?

Outlook is an integrated “Desktop Information Management Program” that allows you to organize and share different types of information on your desktop and to communicate with others.

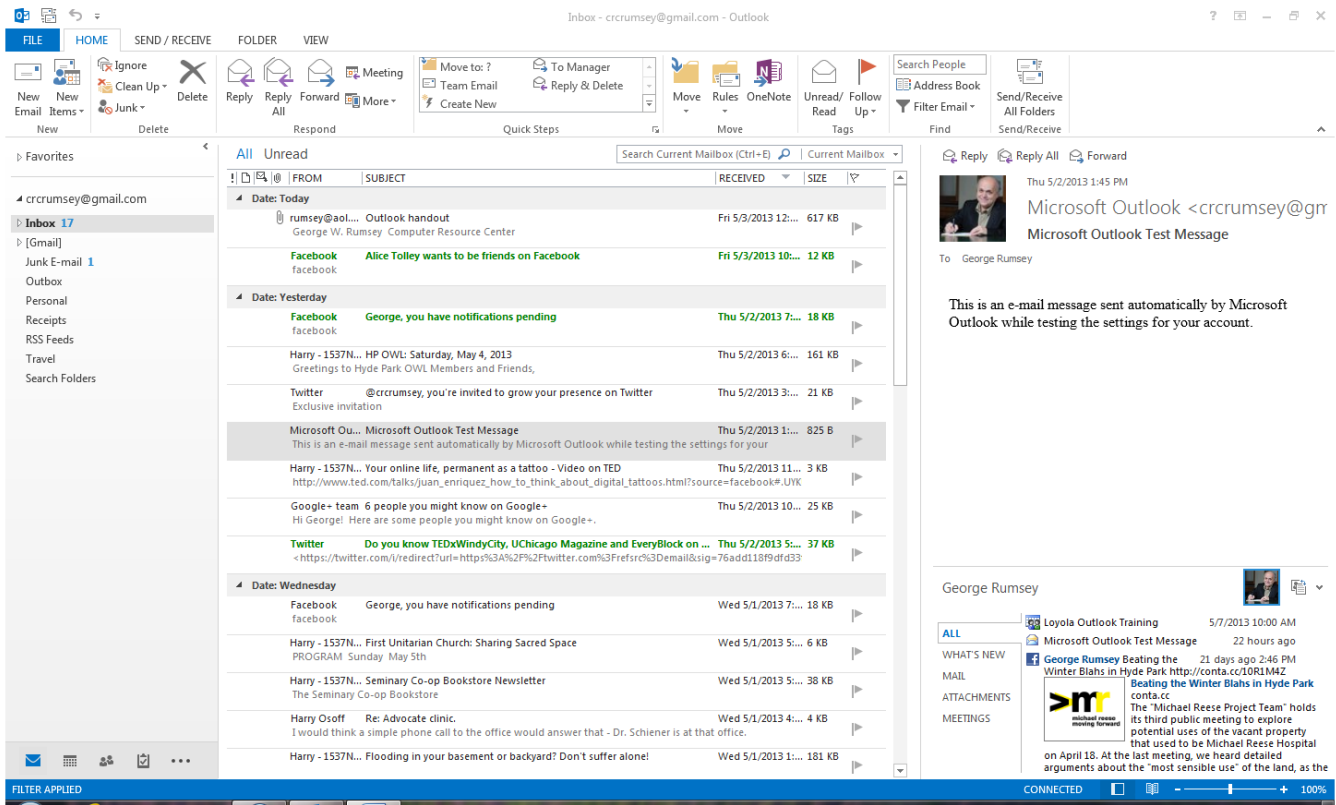
Outlook allows you to manage your information such as:

- E-mail
- Calendar (meetings and appointments)
- Contacts (address book)
- Tasks (to-do list)
- Notes (sticky notes for the screen)
- Folders (all Outlook objects)
- Shortcuts

Across a network, you can distribute information using e-mail, group scheduling, and shared folders and calendars.

All of these items are accessed through the navigation pane at the lower left of the screen. Click each button at the bottom left to switch to that *view*. (Note the “. . .” on the navigation bar, with more options.)

At the bottom right is a “Zoom” sliding scale. There are also buttons to expand your screen into “reading mode” or return to “Normal” viewing mode.



Sample Outlook Screen

Folders

To Outlook, folders are where you store Outlook items, such as email, appointments, and tasks. If you are in your Inbox, then a folder becomes an organizational device for storing your emails.

Email folders are usually separated into your profile folders and your personal folders. The top folder exists on the network server (i.e., also available at the online web client), whereas personal folders reside on your computer. You may also see local “archive folders,” where items are stored after 60 days.

Within the main levels are several important sub-folders, including:

- Inbox—Received mail.
- Drafts—Items not yet ready to send.
- Sent Mail—Items that have been sent.

- Trash—Items you delete (kept until you empty the trash).
- Junk E-mail—Outlook’s spam box.
- Outbox—Items scheduled for delivery at a later time.
- RSS Feeds—“Really Simple Syndication” news feeds (which you must subscribe to).
- Search Folders—Special folders that can be customized to show frequently searched items.

You can easily make additional folders by using the “Folder” tab on the ribbon (toolbar) at top. On the Folder tab is the command to make new folders, new search folders, delete folders, copy folders, and clean up folders.

Note: What a new folder *does* is generally determined by which Outlook section you are in. If you are in Calendar, “new folder” means “new calendar.” If you are in Contacts, “new folder” creates a new address book.

Inbox

In the “Mail” navigation pane is a list of mail folders. The “Inbox” is where your new mail will usually appear (unless you have created “rules,” see below); it provides a listing of email message that you have received, and which ones are not yet read. The Inbox also describes the status of that message: Who is it from? What is its subject? Is there an attachment? What is its priority? You can click each category heading to sort your email by that function.

The appearance of the Inbox is controlled under the “View” tab, where you will find several useful viewing options:

- **Change View**—Compact, single, preview.
- **View Settings**—Control which fields appear, how information is grouped or sorted, and a very handy feature called “Conditional formatting” to control fonts and colors by content (such as, what color unread messages appear).
- **Show as Conversation**—Show email and responses as a “thread,” and it can be turned on and off as needed.
- **Arrange by**—Sort by date, categories, from, to, flat, etc.
- **Layout**—Control settings for the “Folder Pane,” “Reading Pane,” and “To Do Bar.” For example, the reading pane splits your screen in half (horizontally or vertically), and shows you the content of your message without having to open the message (*Options* lets you specify whether or not to mark as “read”). The To-Do Bar shows the task pane and calendar on the right of your screen.
- **People Pane**—Ties Outlook into your social media account (such as Facebook, LinkedIn, or Twitter).

Reading Your Mail

Neither of the preview options shows you the full content of your email. You *must* OPEN your email to see the details about attachments, priorities, voting buttons, and flags. To open an email message, double-click it with your mouse; alternatively, click once on the message, then go to the menu for File/Open/Selected Item, or right-click on the mes-

sage and select “open.” (Note that a shortcut is to use the space bar on your keyboard to scroll through the reading pane view.)

When a message opens, you will have tools across the top, under a tab called “Message”:

- Ignore—Delete (message *and* conversation).
- Junk—Move to Junk folder (which teaches Outlook to remember this is spam).
- Delete—Delete just the message.
- Reply—Reply to sender only.
- Reply to All—Reply to sender or all recipients.
- Forward—Send to another person.
- Meeting—Create a calendar meeting.
- More—Other options.
- Quick Steps—Frequently used commands, which can be stored (macros).
- Move—Put message in a specified folder.
- Rules—Establish an “action” to always be applied in relation to this message or sender.
- OneNote—Send message to Microsoft OneNote.
- Actions—Edit message, re-send, other options.
- Tag—As unread, categorize, or for follow-up.
- Editing—Translate, Find.
- Zoom—Enlarge or shrink (readability).

There is also a “File” tab, with features such as move, resend, and print. (And don’t overlook the “Quick Access” toolbar at the top left corner, with the dropdown to add frequently used commands, such as “Print.”)

Also at the top of an email will be any notations about tracking, receipts, urgency, sensitivity, and voting buttons. Just below the subject line will be any attachments. Double-clicking the attachment launches the file, usually with a warning that the file might be unsafe; click “Enable Editing” if you want to work on the document. (Note: Be very careful about opening or saving attachments; this is a common way viruses are transmitted. Never open an attachment from strangers.)

Replying to Mail

If you click Reply, you get a new screen that allows you to type in a response and send. You also have

toolbar buttons across the top for making new attachments, changing priority, flagging, etc. Notice that the original message is repeated (if you don't wish to do this, you can turn it off under Outlook's File/Options/ Mail Options menu).

Composing New Mail

To create a new email, go to the Home tab. There you can click on the New E-Mail button or the drop-down button for New Items and select Mail Message. You can also double-click the blank area of the Inbox screen (*not* on a message); or you can right-click the window and select New Message; or you can use your keyboard with Ctrl+N. Take your pick!

Writing Your Message

Below the buttons are lines for writing address and subject. Note that both "To" and "Cc" can be clicked to pull up the address book. You can also add "From" and "Bcc" by clicking on "Options."

If you are working on an email but don't have time to finish it, you can save it for future use by clicking File/Save. This step puts it in the "Drafts" mailbox, so you can re-open and continue working on it.

In the "Untitled Message" window that appears, you will find the following "Message" sections:

- Clipboard—Cut and paste functions.
- Basic Text—formatting.
- Names—Addresses from your global and personal address books, along with a "check names" command for manually entered addresses.
- Include—Attach a file, an Outlook item (such as a calendar or business card), or a signature.
- Tags—Mark your messages with indicators of importance.

On the "Insert" tab are options to insert attachments and Outlook items, tables, illustration (pictures and charts), links, text (such as Date & Time), and symbols (such as horizontal lines).

On the "Options" tab are Themes, Show Fields (such as BCC), Voting Buttons, Read and Delivery Re-

ceipts, and More Options (such as Delay Delivery and Direct Replies to).

The "Format" tab gives you extended Word formatting capabilities (such as Styles). The "Review" tab has the Spell Check and Thesaurus. And the "File" tab has "Save" and "Move" options.

Formatting Your Message

On the "Format" tab, you will find a very important option called "Format" There are three choices:

- HTML—Web format, allowing the greatest use of graphics, colors, etc. Also the "largest" format size, and most susceptible to viruses.
- Plain Text—Pure ASCII (keyboard characters), no formatting. Safest and smallest.
- Rich Text—Microsoft formatting (still susceptible to viruses).

Formatting options are determined by which of these email formats you have chosen.

There are also choices to create or pick a stationery (letterhead) and to create signatures. You can also store parts of an email for reuse with "QuickParts."

Tips to Remember

- The Inbox is where you go to send new mail as well as to read mail.
- You can click on the **To** button to pull up your address book and see other options (such as "Blind carbon copy").
- To save email attachments, click **File** and **Save Attachments**, then click **Save**.
- On the **View** menu is a choice called "Arrange by," useful for sorting your mail. One very popular feature is "show in groups," which will organize your email by sender, date, topics, etc.

Find

Across the top of the Inbox is a command line called "Search Current Mailbox (Ctrl+E)." When you click in this box, a new tab appears at the top of the screen called "Search." It gives you choices to search all folders (not just current folder) or all Outlook items, from, subject, has attachment, date, and other properties.

Contacts

The contact management program records a wide variety of information about people or companies or organizations—not just email addresses.

- Address books can be viewed in multiple ways by clicking the “Change View” dropdown in the “Current View” section. Views include address cards, business cards, phone lists, categories, and others.
- Click the **New Contact** button to create a new entry in your personal address book, or double-click the white space. Fill out the appropriate fields, then click the **Save and Close** button.
- Click the **New Contact Group** to create a distribution list (see below).
- Under **Show** at the top of the new entry, you will find options to add additional fields that do not otherwise appear (such as children’s names). These can be used to sort your contact list. One very useful “Show” option is “activities,” which will list every reference to this person in your Outlook (all emails, appointments, tasks, etc., will be shown on one screen).
- **Folder/New Folder** (on the ribbon) allows you to create additional address books, independent of the built-in address book. Then, when composing mail messages, you can use the pull-down on the “Contacts” button to select from your additional address books.

Shortcut: Right-click any email address in a message to quickly create an entry in your contacts.

Distribution Lists

On the “Home” tab is an additional useful option called “New Contact Group.” This creates a distribution list, storing a group of email addresses under one name, so that your email can be addressed to the one name, but sent to the entire list.

The distribution lists has two ways to “Add Members.” They can be added from an Outlook contacts or address book, or they can be manually entered as “New Email Contacts” (and not stored otherwise as separate entries in the contacts.

Business Cards

One way of “viewing” your contacts is as business cards. When composing an email you also have an option to “attach” business cards. This is an easy way to send someone an Outlook Contacts entry, which they can save in their own address book.

Many people now have personal Outlook business cards, which they attach as part of their email signature. That way, when I receive your email, I can double-click your business card attachment, click “Save,” and you are added to my address book without my having to do any typing.

Calendar

This organizing tool allows you to schedule every imaginable activity—repeat activities, mark blocks of time, set alarms and reminders, etc. Outlook separates calendar events into two categories:

1. **Appointments** (one person)—Shows on your calendar.
2. **Meetings** (multiple persons, and perhaps resources, such as a room)—Shows on others’ calendars, includes an email invitation with voting buttons to accept or decline, and allows you to check others’ schedules for availability.

Calendars can be viewed in multiple ways by clicking the *buttons on the toolbar* at the top. Views include today, next 7 days, 1 day, work week, 7-day week, and month.

Appointments

When you create a calendar appointment, you get a series of “Calendar Tools.” These include options to switch to a meeting (Scheduling/Invite Attendees), options for how it displays on others screens (busy, out of office, free), reminders, recurrence (put it on your calendar more than once), categories (color codes), and more.

- To set appointments, double-click the time you want the appointment to occur. Alternatively, click, hold, and drag to select a block of time, then start typing (while the block is blue) to in-

sert an appointment. Click, hold, and drag the border of an appointment to make it span more time. Double-click the border to see the options for an appointment (such as reminders or color labels).

- If you want to set two appointments for the same time, click the time in the left margin, then start typing! A second entry is created for the same time period.
- Click a day in the navigation pane's calendar to see the appointments for that day. Use the arrows at either end of the month to see additional months. Stretch the navigation pane wider if you want to see more months.
- Select **Invite Attendees** (when you double-click a time) to request a meeting with other people and book it on their calendar; use "Scheduling" to see others' calendars.
- Use **Recurrence** if you want this meeting to be repeated at additional times on your calendar (such as a monthly staff meeting).
- One very important tool under the "Tags" options looks like a lock, for "Privacy." Even if you share your calendar with others, appointments marked "private" cannot be read, viewed, or edited by anyone other than you.

Right-clicking the hours (left side of the calendar) allows you to select time increments (from 5 minutes to 60 minutes) for display.

Under File/Print are your options to print the different calendars: daily, weekly, monthly, and many more formats to select from.

In the center of the left navigation pane is a window that shows "My Calendars" (use File/New if you want to create multiple calendars). By right-clicking the icon for a calendar, you can set its "properties." One of the properties is called "sharing." This allows you to give other people permission to read and/or edit your calendar from their own computer.

On the View menu of the calendar is the option to show your "Daily Task List" at the bottom of the calendar, or the "To-Do Bar" on the right of your calendar. There is also a command to change the colors of your calendar.

Meetings

Meetings have the same options as appointments, except they need to be "Scheduled." In the "New Meeting" window is a "scheduling" button, which allows you to select people you wish to invite, review their calendars to find an available time, then send the invitation.

People who receive meeting invitations need to watch for the "Voting Buttons" in the email as the appropriate way to respond. Accepting or declining a meeting marks it on all calendars for those who are invited. If you just reply (rather than "vote") this will not happen.

Many organizations that use Outlook have added rooms and other resources (cell phones, video cams, sound systems) to the Outlook address book, so that you can "invite a room" to a meeting as a way to reserve the room.

Tips to Remember

- Calendar defaults are located under File/Options. This is where you will find your time schedule and the "Add Holidays" command.
- Emails can be dragged from your Inbox to the Calendar, to create an appointment or meeting.
- If you share calendars, when you display them side-by-side on your screen, click the arrow on the tab to see a merged view.
- If you share many calendars, use "Calendar Groups" to keep them organized.

Tasks

The Tasks icon organizes a to-do list, as well as prioritizes tasks.

- Create list of work to be done, to be sorted by due date, category, or percent completed. Double click any entry to edit or delete, or delete by dragging to trash.
- Entries on the task list also appear on the daily calendar, where you can mark them completed.
- Use the "Current View" section on the "Home" tab to see detailed versus simple lists.

On the Change View dropdown are multiple display options for tasks, including a detailed view with many more options.

Tips to Remember

- Tasks can be assigned. When you create a new task, there is a button for “Assign Task,” which sends it to another user’s Outlook. They can then send you “Status Reports.”

Notes

On-screen messages, similar to “post-it” or sticky notes.

Folder List

Pulls up a list of all folders (all icons) you have access to in Outlook.

Shortcuts

Create your own list of icons (as opposed to the Folder List). When in the “Shortcut” view, use the Folder tab on the ribbon, where you will find a button for “New Shortcut.”

Quick Steps

“Quick Steps” are like macros—they store frequently repeated commands, such as “move to a folder” or “forward to a certain person.”

When you click the dropdown for Quick Steps, you find a few generic commands (which can be edited), or the command to create “New” steps, with common instructions, such as move a message, categorize, flag, start a new email, forward a message, create a new meeting, or custom.

Rules

Rules are the Outlook answer to junk mail or spam, as well as a useful organizational tool; this is also where the “Out of Office” instruction resides. Select

the “New Rule” button on the Home tab to create a rule. The purpose of a rule is to filter or channel your email to the appropriate folder or box or person. Rules apply when messages are received or when they are sent (NOT when they are read).

When you click “Create Rule,” you get some frequently used options. Use the “Advanced” button to find the rule wizard, which walks you through the process. You can pick from the built-in (template) rules or start from a blank rule.

Step 1 of a blank rule is to select the “conditions” you are looking for in a message (such as from, subject, specific words, etc.).

Step 2 is to “Edit” the rule description, by clicking the underlined value. If you creating a rule based on a word in the subject or body (for example), you click the blue underlined text in order to specify the word you are looking to find.

Step 3 is to select an “action,” such as delete it or move it to a specified folder. You may then have to again “Edit” the description by clicking the blue underline.

Step 4 is to provide any exceptions, and the final step is to “Turn on this rule.”

Custom Outlook Considerations

Most default settings for MS Outlook are located on the “File” tab on the ribbon, under “Options.” Important considerations include

- **Mail**—Where you can pick plain text, rich text, or HTML as defaults; spell check and autocorrect; signatures, stationery, and fonts; how replies are handled; when messages are saved or sent; receipts.
- **Calendar**—Work hours (start/end time), color, reminders, add holidays, fonts.
- **Contacts**—How names are filed, use of photos.
- **Tasks**—Reminders, colors.
- **Advanced**—Outlook panes, autoarchive, empty deleted items when exiting.

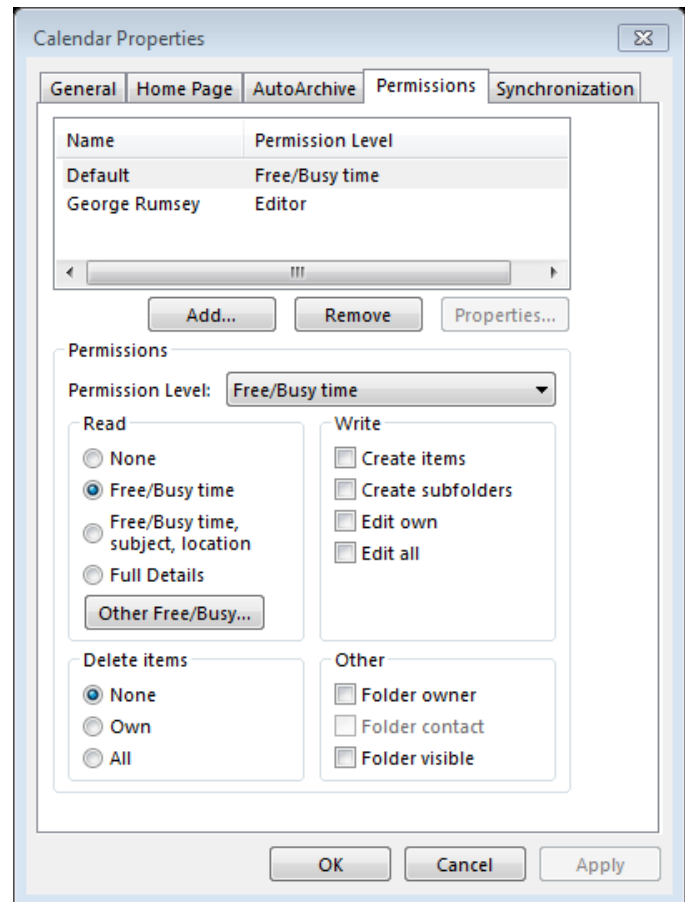
2013 Calendar Sharing

If you want other users within your Exchange network to be able to see, read, even edit your calendar, then you must “share” it with them by clicking the “Share Calendar” button on the ribbon, which will send them an email invitation to see your calendar. Be sure to select whether or not you want them to be able to read your calendar or just see if you are busy or free; also be sure to check the extra box if you want to request permission to read *their* calendar as well.

Once the other person has “accepted” your invitation, you can then decide what you want that person to do with your calendar. There is a button called “Calendar Permissions” (or you can right click your calendar and go to “Properties”), where you will see a dialog window that shows you who you’ve shared with, and what capabilities they have (such as the ability to read your calendar, edit your calendar, add to your calendar, and delete from your calendar). These options can be altered by you at any point. If you want them to have full capabilities, you can give them “folder owner” permission (do this cautiously).

Tips to Remember

- Calendar defaults are located under File/Options. This is where you will find your time schedule and the “Add Holidays” command.
- Emails can be dragged from your Inbox to the Calendar, to create an appointment or meeting.
- If you share calendars, when you display them side-by-side on your screen, click the arrow on the tab to see a merged view.
- If you share many calendars, use “Calendar Groups” to keep them organized.



Commonly Asked Questions

Can I add my personal email accounts to the Outlook Inbox?

Yes, but remember that your emails then reside on company's network, which makes them available to others.

Are the toolbars customizable in Outlook?

Yes, but don't. First, most commands aren't toolbars any more—you work with the "ribbon." But rather than change the default ribbon, users should customize the "quick access toolbar" in the upper left corner. You can go to the drop-down and find every command available, and put it on the toolbar (look under "more commands" and set the dropdown to "all commands" for the complete list).

Can I turn off the Mail Preview feature? How?

There are two mail preview features in Outlook. One is the reading pane, which many people dislike because it eats a lot of your screen and poses a possible security concern (HIPAA compliance, for example). Reading pane settings are located on the ribbon under "View." You can move it to the right, the bottom, or turn it off.

There is also a "message preview" on the View ribbon (when you're in the inbox), which lets you see a few lines of your email underneath each message, not as a separate window. Also, the People pane can also be turned off via the view ribbon.

Where do I go to see Read Receipts?

"Read receipts" appear in your inbox, with your other emails. Remember that single-clicking on an email is enough to trigger the receipt command, but at least Outlook asks (once) if you want to send the receipt.

Can I set up a rule that will automatically move a read message to a folder?

Yes, but you have to have your rules turned off for it to work. You can then manually run the rules by going to the "folder" tab and selecting run rules. But you have to do it every time.

Rules are meant to run when a message is received or sent, not when it is read. Use "quick steps" to create shortcuts for moving read messages. Quick steps run when you click on them, and they only apply to highlighted messages.

Mail Rules: Can I set up multiple exceptions?

Yes. For example, if you set up a rule to trash email containing specific words, you can add as many words as you like. You can keep clicking "add" to get another line and another line. Same applies to names, addresses, etc.

Does the Ignore feature automatically delete emails? Where do Ignored emails go?

Trash. It also takes any related "conversations" if you have that turned on. It will also appear that you have lots of unread messages in your trashcan!

If I wanted to attach certain documents in sending an email, can I drag and drop these files from my desktop directly to email I'm composing?

Yes. If it is a Microsoft file, remember that you can also send from within the program (such as Word or Excel). Look under "file," and then "save and send" — which automatically attaches your document.

Is there a way to retract an email in Outlook?

Yes. Look under your "sent" items. You can open a sent message, then click on "file," where you'll see an option to "resend or recall" (this option is also available on the ribbon under "actions." This only works if the person hasn't yet read the message.

How do I set up out-of-office messages (automatic replies)?

Look under "file" and select "automatic replies." Note that it gives you an "in-house" version and an "external" message.

What is "delegate access"?

If you elect to share any of your outlook folders (calendar, email, contacts, or tasks), you "delegate access." It is important to limit the permissions to whatever is appropriate (can the person read, or is the person an editor, who can read, create, and change?). "Ownership" per-

mission allows the person to keep the shared item on their own desktop and use it as if it were their own. They can add, edit, and delete.

Our department has an office calendar with key dates. How do I set up an office calendar that my team members and I can share and modify?

Someone needs to “own” the calendar (the person who creates it), and that person can then “share” it with others. When you share, be sure to select appropriate levels of control (editor or reviewer or owner). If people all want to be able to see and edit it, make them “owners.”

If I give someone permission to view my calendar, will they see the details of an appointment or meeting I’ve set? Can I control how much information they can see?

Automatically, all calendars on the exchange network are viewable by all other users – but they aren’t readable. All you see is free, busy, out of office, away. Only if you “share” your calendar with someone can they actually read the content. Even then, any appointment or meeting can be marked as “private,” which means no one but you can read it. Be sure, when you share, to select whether or not the person can see details or only the busy status.

How do I set up recurring meetings?

Be sure to click “new meeting” rather than an appointment. When you do that, you’ll find a button on the ribbon for recurrence, which includes options for start, end, duration, daily, weekly, monthly, and which days. Be sure to set an “end after” or “end by” as outlook continues for 4,000 years.

And no, you cannot have recurring meetings if they do not follow a pattern.

What is the difference between Folders and Categories?

Folders are storage/organizational places where items are put. (But outlook also uses the term (confusingly) to describe calendars, address books, task lists, etc. Go to calendar and click “new folder” and you suddenly have two calendars!) Categories are codes that apply to content (email, tasks, etc.), which can be used for sorting and searching.

Is it possible to view my email quota information in Outlook?

Look under “file” where you’ll see an option called cleanup tools. First option is called “mailbox cleanup,” where you’ll find “view mailbox size.”

Skills Check List

To become a “power” user of Outlook, you might want to explore the additional settings and capabilities that are often overlooked or forgotten. Here is a summary of tools and options to review.

- 1) View
 - Reading, To-Do, People Panes (moving, using, turning off or customizing)
 - View Settings
 - Columns, Group By, Filters
 - Conditional Formatting (how to turn your boss’s email red so you don’t miss it)
 - Show as Conversation (on/off)
- 2) Folder
 - New Folder (organizing your emails)
 - Search Folders (saved searches)
- 3) Home (Overlooked Options)
 - Quick Steps (macros, or shortcuts that can be re-used as needed)
 - Rules (what happens to your email when it arrives)
 - OneNote (creating text backups of key emails)
- 4) Email
 - Options (voting, receipts, expire, schedule)
 - Reminders, Priorities, and Categories
 - Business Cards and Signatures
 - Attach Items (calendar, emails, tasks)
 - Templates and Quick Parts
 - Inserting Screen Clips
 - Setting the Default Address Book
- 5) Calendar
 - Meetings via Scheduling Assistant
 - Sharing (properties and “ownership”)
 - Grouping Calendars
 - Adding Gmail/Google Calendars
- 6) Account Settings (File)
 - Account Settings
 - Delegate Access (“on behalf of”)
 - Out of Office
 - Cleanup Tools
 - RSS Feeds
 - Options
 - Mail (panes, signatures, stationery/fonts)
 - Calendar (work times, holidays)
 - Search (setting default to “all folders”)
 - Advanced (automatic trash delete)