



# Outlook 2013

■ Microsoft® Office

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## Introduction

### IN THIS CHAPTER

- Starting Outlook
- Understanding the Outlook Interface
- Understanding the Outlook Items
- Understanding the Message Window
- Using the Navigation Pane
- Using the Reading Pane
- Using the To-Do Bar
- Setting up Outlook

*Part of the Microsoft Office 2013 suite of programs, Microsoft Outlook 2013 is a communication-management program that helps you quickly and efficiently manage messages, schedules, address books, and other information. This guide is designed for beginning to intermediate-level computer users and offers a comprehensive look at the features of Outlook that most people will use most frequently.*

## Starting Outlook

In order to use a program, you must start—or launch—it first.

1. Click on the **Start** Button.
2. In the Search Program and Files box type **Outlook**.
3. Click on **Outlook 2013** from the Program results.
4. The Microsoft Outlook 2013 program will open.



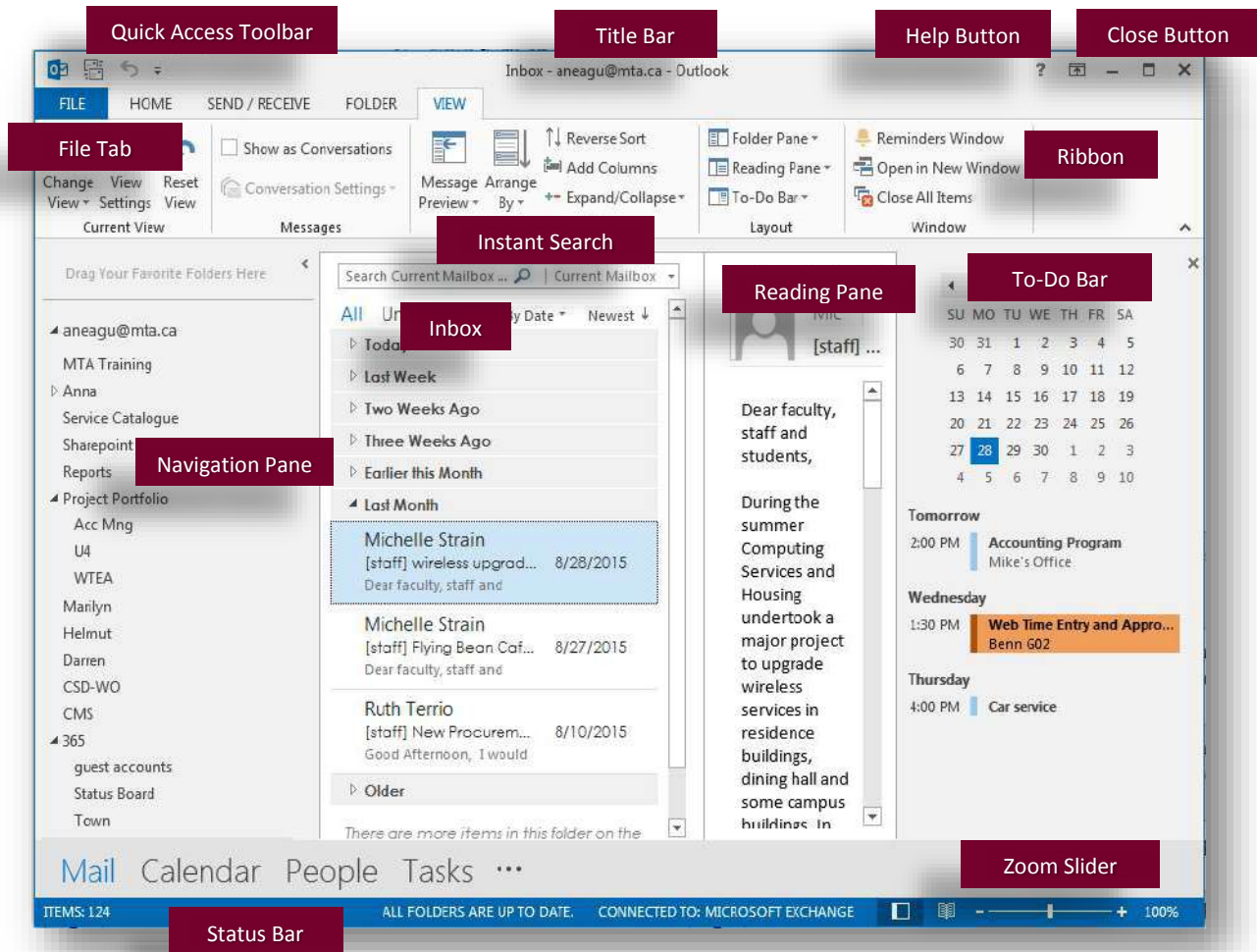
Finder / Applications



*For quicker access, you might consider pinning the Outlook program to the taskbar or Start menu. To do this, right-click **Microsoft Outlook 2013** in the All Programs menu and select **Pin to Taskbar** or **Pin to Start Menu**.*

## Understanding the Outlook Interface

The Outlook 2013 program screen may seem confusing and overwhelming at first. This lesson will help you become familiar with it.











- ❑ **Quick Access Toolbar:** Contains common commands such as Send/Receive and Undo. You can add and remove commands as desired.
- ❑ **Inbox:** Lists all of your email messages and can be arranged according to your specifications.
- ❑ **Instant Search:** Enter key words to search the current folder or location. Results appear as you enter each search term.
- ❑ **Title Bar:** Displays the name of the program you are currently using (Outlook), and the item you are currently working with.
- ❑ **To-Do Bar:** Keep tabs on your calendar, appointments, and tasks, all in one place. The To-Do Bar can also be displayed in a minimized format.
- ❑ **Reading Pane:** Displays the contents of the selected message.
- ❑ **Close Button:** Click here to exit the Outlook program.
- ❑ **Help Button:** Click here to open the Outlook Help window.
- ❑ **Ribbon:** The tabs on the Ribbon replace the menus and toolbars found in previous versions of Outlook.
- ❑ **Navigation Pane:** Contains buttons and icons you can click to move among Outlook's folders and tools.

- ❑ **Zoom Slider:** Click and drag the slider to zoom in or out of an item or view. You can also use the + and – buttons.
- ❑ **Status Bar:** Displays information and reminders about Outlook items. Right-click the status bar to specify what information is shown.
- ❑ **File Tab:** Click here to access common commands (Open, Print, Save) as well as more advanced ones (Automatic Replies, Mailbox Cleanup, Rules and Alerts).

## Understanding the Outlook Items

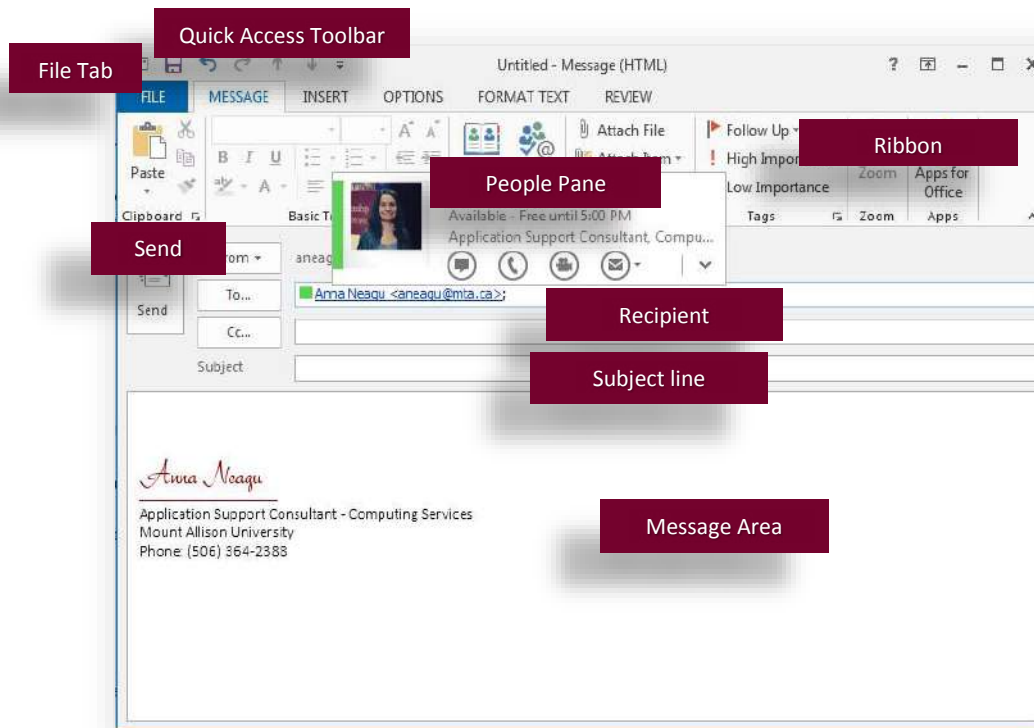
In Outlook, an item is the basic element that holds information. Items are used to send and view e-Mails, and also to organize information like tasks and contacts.

Table 1 - *Outlook Items* provides an overview of the items used in Outlook.

	<b>Mail Message</b>	Compose a message to be sent by e-Mail.
	<b>Appointment</b>	Add an appointment to your calendar.
	<b>Meeting Request</b>	Set up an appointment to which you invite other people, or reserve resources such as a conference room
	<b>Contact</b>	Enter information about a person including their name, company, job title, and e-Mail address.
	<b>Contact Group</b>	Create a collection of contacts that allows you to quickly send mass e-Mails.
	<b>Task</b>	Enter to-do items that can be tracked until completion.
	<b>Task Request</b>	Inform someone else of a task you would like them to perform.
	<b>Note</b>	Write something quickly in a note. Can be sorted using color categories.

## Understanding the Message Window

The Mail message window, like the program window, features the Ribbon in place of menus and toolbars. This lesson will help you become familiar with the basic features of the message window.



- Quick Access Toolbar:** Contains common commands such as Send/Receive and Undo. You can add and remove commands as desired.
- Ribbon:** The tabs on the Ribbon replace the menus and toolbars found in previous versions of Outlook.
- Recipient:** Enter the email addresses of recipients in the To field. Use the CC field to send a copy of the message to recipients who are not directly involved, but might be interested in the message.
- Subject line:** Enter a title here so that recipients quickly know the reason for your email.
- Message Area:** Type your email message here as you would using a word processor.
- People Pane:** Displays information about the person associated with the message.
- Send button:** Once you've finished composing your message, click the Send button to send it.
- File Tab:** Click here to access common commands (Open, Print, Save) as well as more advanced ones (Automatic Replies, Mailbox Cleanup, Rules and Alerts).

Outlook 2013 provides easy access to commands through the Ribbon, the File tab, and the Quick Access Toolbar.

### **Ribbon**

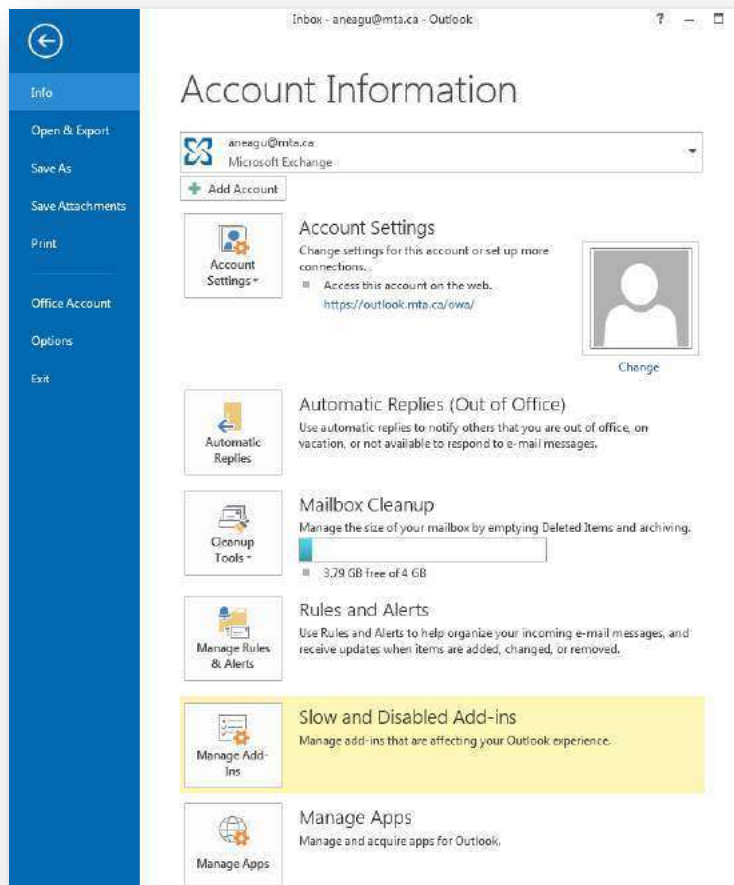
The Ribbon replaces the menus and toolbars found in previous versions of Outlook. The Ribbon keeps commands visible while you work instead of hiding them under menus or toolbars.

The Ribbon is made up of three basic components:

- ☑ **Tabs:** Commands are organized into tabs on the Ribbon. See Table 1-3: Tabs on the Ribbon for a description of the different types of tabs.
- ☑ **Groups:** The commands found on each tab are organized into groups of related commands.
- ☑ **Buttons:** To issue a command, click its button on the Ribbon.

### File tab

With the *File* tab you can access common commands (Open, Print, Save) as well as more advanced ones (Accounts Settings, Cleanup Tools, Manage Rules and Alerts).



### Quick Access Toolbar

The *Quick Access Toolbar* appears above the File tab and provides easy access to the commands you use most frequently. The Send/Receive and Undo buttons appear on the toolbar by default; however, you can customize this toolbar to meet your needs by adding or removing buttons.

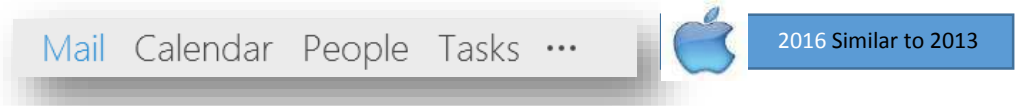


## Using the Navigation Pane

Outlook is made up of several panes, each with its own set of tools and folders. You can switch between these panes using the Navigation Pane.

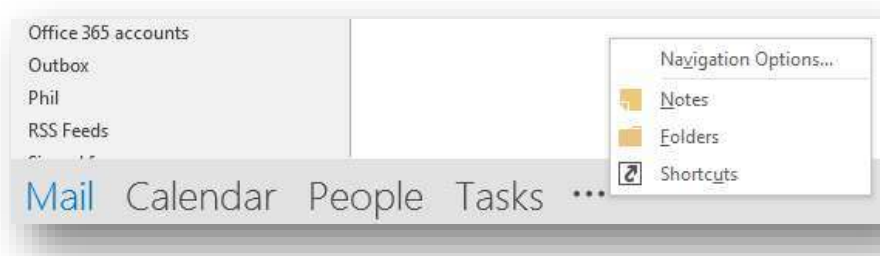
### Switch between panes

The Mail pane appears by default whenever you start Outlook. To switch to another pane, such as Calendar or Contacts, use the buttons in the Navigation Pane.

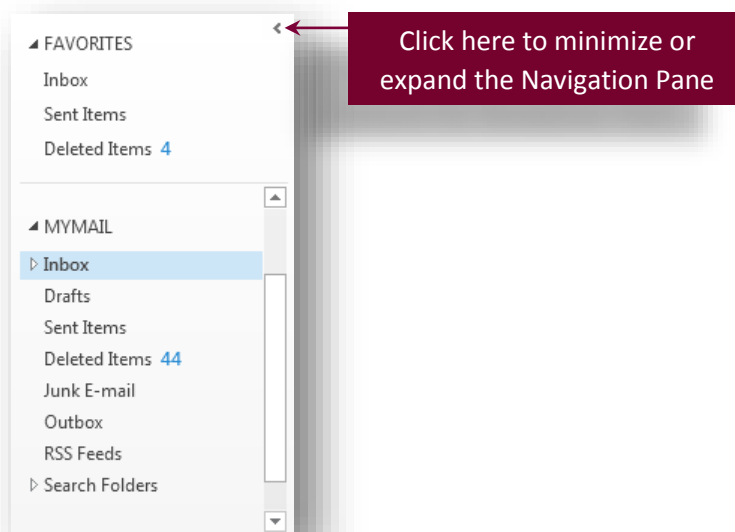


### Customize the Navigation Pane

Click the Configure buttons button in the bottom-right corner of the Navigation Pane.



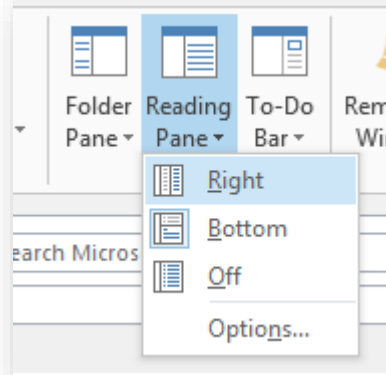
To minimize or expand the Navigation Pane, click the Minimize/Expand the Navigation Pane button in the upper-right corner of the Navigation Pane; or click the VIEW tab on the Ribbon, click the Navigation Pane button in the Layout group, and select an option from the list.



## Using the Reading Pane

You can preview a message without having to open it using the Reading Pane. By default, the Reading Pane appears to the right of the Inbox, but you can move the Reading Pane to another position in the window.

Click the **VIEW** tab on the Ribbon, click the **Reading Pane** button in the Layout group and select the position you want to use.

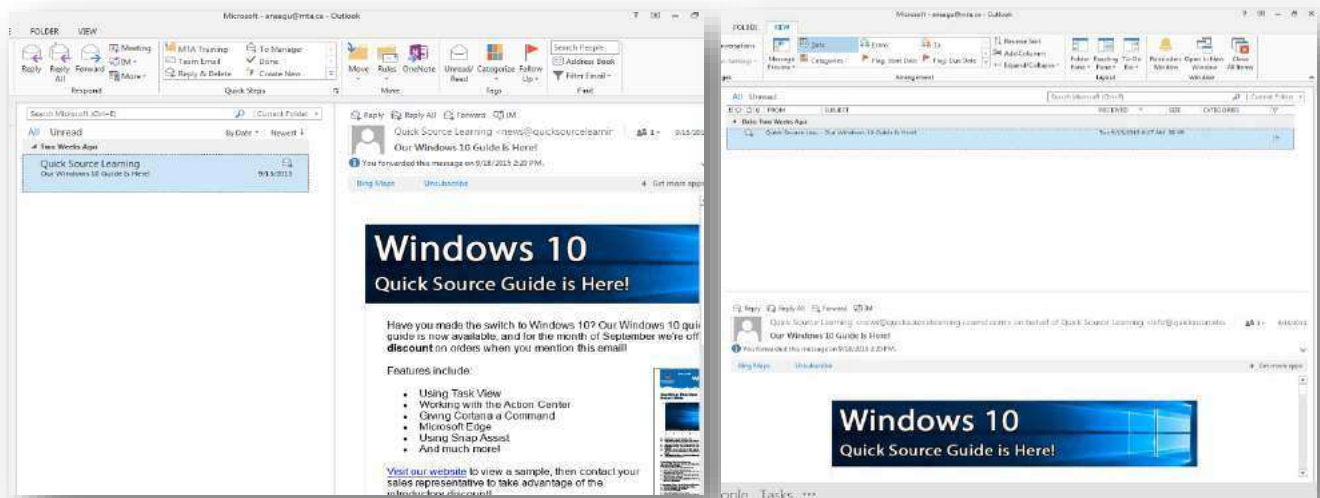


Organize Tab / Reading Pane



*Typically, the Mail folder is the only folder in which the Reading Pane is used extensively.*

*You can view messages safely in the Reading Pane— potentially malicious scripts or attachments are not activated or opened automatically.*



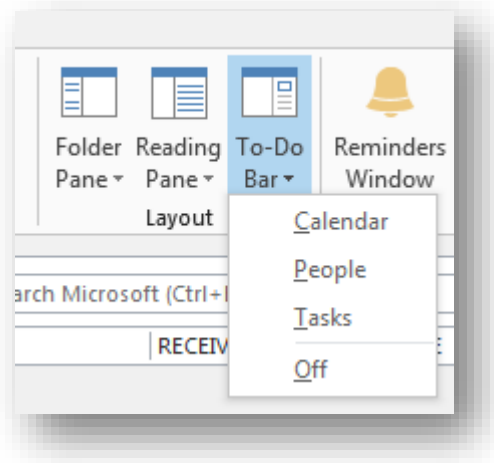
## Using the To-Do Bar

Outlook 2013 has a feature called the To-Do bar that pulls together all the things you need to do and displays them in a single part of the Outlook screen. The goal of the To-Do bar is to let you know what you need to do at a glance rather than making you check your calendar, then check your e-mail Inbox, and then check your Task list.

The items you'll see most often in the To-Do bar include:

- Your next few appointments / meetings*
- Tasks you've entered*
- E-mail messages you've flagged for action*

Click the **VIEW** tab on the Ribbon, click the **To-Do Bar** button in the Layout group, and click the item you want to show/hide.

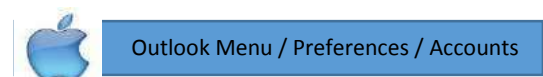


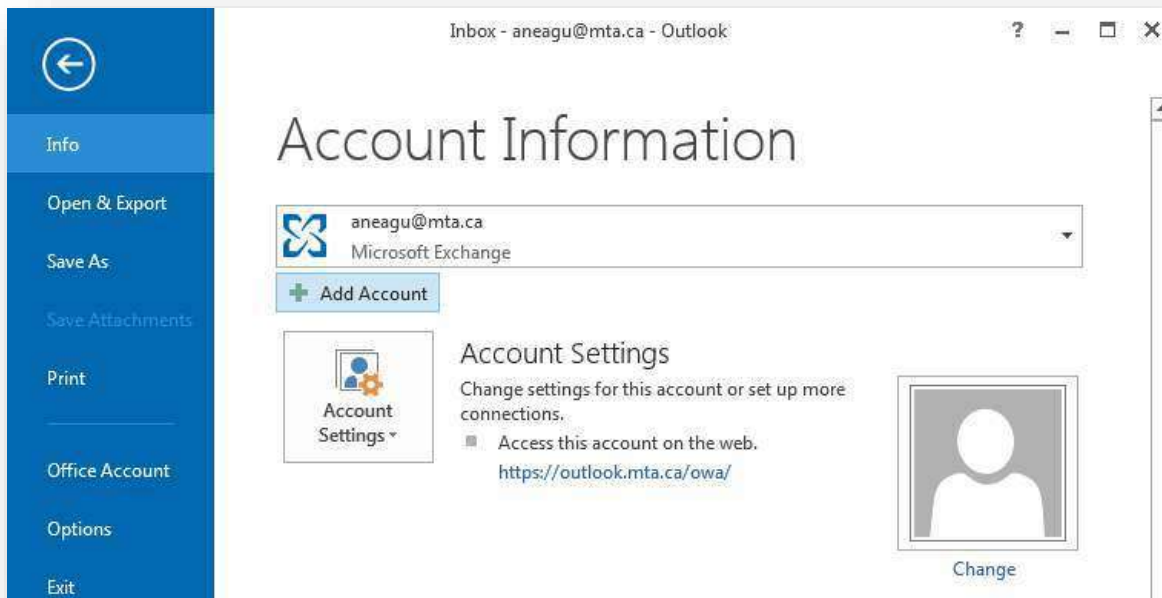
To turn off the To-Do Bar, click the **VIEW** tab on the Ribbon, click the **To-Do Bar** button in the Layout group, and select **Off** from the list.

## Setting up Outlook

You'll need to **set up Outlook** before you can start using the application to manage your email, contacts, calendars, and tasks. The setup process will **vary** depending on how you plan to use Outlook. If you plan to use Outlook in the **workplace** with an **employer-provided email account**, it's likely that your account will already be set up when you start using Outlook. If not, your office's **IT department** or **supervisor** will help you with the setup process.

1. Open Outlook 2013.
2. From the top Menu select the **File** tab.





3. Above the **Account Settings** button, click **Add Account**.
4. On the **Auto Account Setup** page, ensure that **Email Account** is selected and then enter the following information:
  - In the Your Name field, enter your name as you want it to appear on your emails.
  - In the E-mail Address field, enter your [userid@mta.ca](mailto:user@mta.ca)
  - In the Password field, enter your password. Re-enter the password in the Retype Password field.
  - Click **Next**.
5. Wait for Outlook to find your server. This could take a few minutes.
6. Click **Finish** once Outlook has completed configuring your Office 365 account.

## Using the Email System

### IN THIS CHAPTER

- Composing and Sending an Email
  - Specifying Message Options
  - Formatting Text
  - Inserting a Signature
  - Attaching a File to a Message
- Receiving and Reading Email
- Replying to and Forwarding a Message
  - Deleting a Message
  - Organizing Messages
  - Printing Messages

*Over the past decade, email (short for electronic mail) has become an accepted and even required form of business communication. And of course, many people use email to keep in touch with friends and family, either from work or from home. Outlook makes it easy to connect to multiple email accounts, either on a business network or over the Internet, and provides all the tools you need to send, respond to, organize, filter, sort, find, and otherwise manage email messages.*

### Composing and Sending an Email



Home Tab / New Email

This lesson explains how to perform the most basic e-Mail task of all: how to compose and send an e-Mail message.

1. Click the **MAIL** button in the bottom Navigation Bar. The Inbox appears.
2. Click the **HOME** tab on the Ribbon and click the **New E-Mail** button in the New group. An Untitled – Message window appears.
3. Enter the recipient’s e-Mail address in the **To**, **Cc** and/or **Bcc** field(s).

**To:** Use for primary message recipients. Usually, these are the people you want to respond to the message. Each message must have at least one address in the To box.

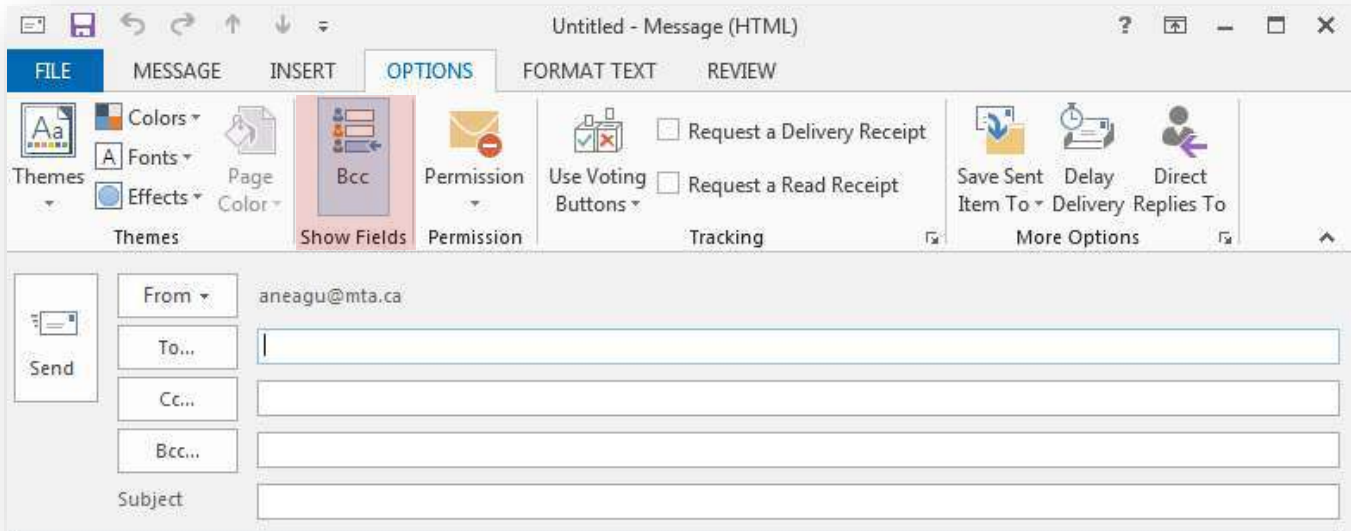
**Cc:** Use for “courtesy copy” recipients. These are usually people you want to keep informed about the subject of the email message but from whom you don’t require a response.

**Bcc:** Use for “blind courtesy copy” recipients. These are people you want to keep informed, but whom you want to keep hidden from other message recipients. Bcc recipients are not visible to any other message recipients and therefore aren’t included in message responses unless specifically added to one of the address boxes in the response message.



The **To** and **Cc** address boxes are always displayed in the message header. The **Bcc** address box is not displayed by default. You can display it in the message header by clicking the **Bcc** button, located in the **Show Fields** group on the **Options** tab of the message composition window.

You can insert an email address into an address box in the following ways:



- Enter the entire address.
- Enter part of a previously used address and then select the address from the Auto-Complete List that appears.
- Click the address box label to display the Select Names dialog box, in which you can select one or more addresses from your address book(s).



If you want to send the message to more than one person, insert a semicolon (;) between each recipient's e-Mail address—for example, *jhurley@mta.com; bralley@yahoo.com*.

**KEYBOARD SHORTCUT** Press Ctrl+K to initiate address resolution. For more information about keyboard shortcuts, see "Keyboard shortcuts" at the end of this book.

4. Type the subject of the e-Mail in the **Subject** field. The Subject field lets your recipients know what the message is about.

Enter a brief description of the message contents or purpose in this field. The subject is not required, but it is important to provide information in this field, both so that you and the recipient can identify the message and so that the message isn't blocked as suspected junk mail by a recipient's email program. Outlook will warn you if you try to send a message with no subject.

5. Click inside the body area of the message window and type your message. You can include many types of information, including formatted text, hyperlinks, and graphics in the message body.
6. Click the **Send** button in the Message window. Your message is released into cyberspace and on its way to the specified recipient(s).

## Troubleshooting the Auto-Complete List

As you enter a name or an email address into the To, Cc, or Bcc box, Outlook displays matching addresses in a list. You can insert a name or address from the list into the address box by clicking it or by pressing the arrow keys to select it and then pressing Tab or Enter.

Sometimes the Auto-Complete List might contain incorrect or outdated addresses—for example, if you have previously sent a message to an incorrect email address, or if a person changes his or her email address. The list might also contain people with whom you no longer correspond. If you don't remove incorrect or outdated addresses from the list, it can be easy to mistakenly accept Outlook's suggestion and send a message to the wrong address.

To clean up the Auto-Complete List:



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1. In the list, point to the name or address you want to remove.
2. Click the **Delete** button (the X) that appears to the right of the name or address.

You can modify the Auto-Complete List settings in the Send Messages section of the Mail page of the **Outlook Options** dialog box as follows:

- To prevent the Auto-Complete List from appearing when you enter an address, clear the **Use Auto-Complete List to suggest names...** check box.
- To remove all entries from the Auto-Complete List (and start the list from scratch) click the **Empty Auto-Complete List** button, and then click **Yes** in the dialog box that appears.

## Managing multiple accounts

If you have configured Outlook to connect to multiple email accounts, you need to ensure that the message is being sent from the correct account.

By default, Outlook assumes that you intend to send a message from the account you're currently working in. If you begin composing a message while viewing the Inbox of your work account, for example, Outlook selects the work account as the message-sending account. If you reply to a message received by your personal account, Outlook selects the personal account as the message-sending account.

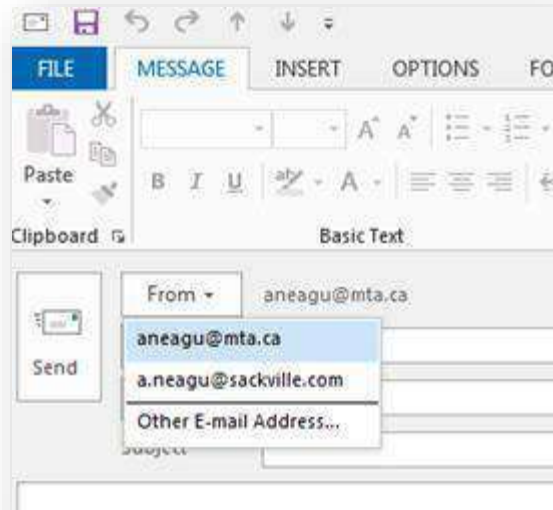
You can easily change the message-sending account. When Outlook is configured to use multiple accounts, a From button appears in the message header.



*If Outlook is configured to connect to only one account, you can display the **From** button by clicking **From** in the Show Fields group on the Options tab of a message composition window. Clicking the **From** button displays a list of active accounts from which you can choose.*



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### Specifying Message Options

Outlook lets you specify options for your email messages. You can mark messages as urgent, specify a read receipt for all messages, or request that your messages be encoded so that they can only be read by the intended recipient(s).

#### Set message priority



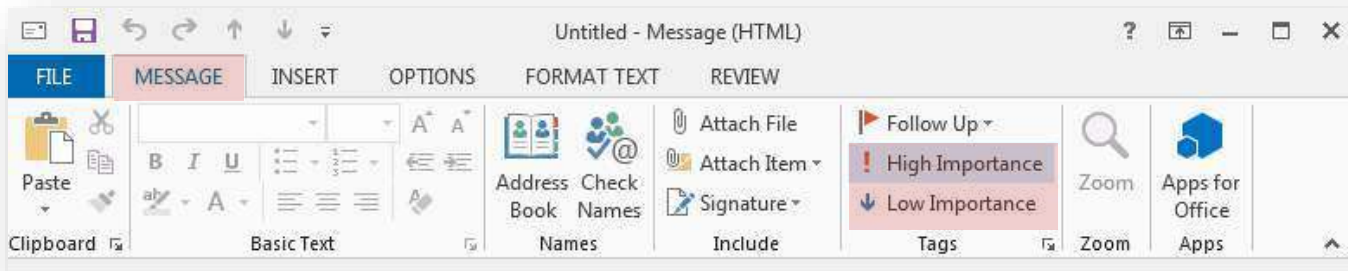
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If the intended recipient of a message receives a lot of email throughout the day, specify your message as important so that it will stand out in his or her Inbox.

1. In the Message window, click the **MESSAGE** tab on the Ribbon.
2. Click the *High Importance* or *Low Importance* button in the Tags group.

**High Importance:** Inserts a red exclamation point next to the message subject.

**Low Importance:** Inserts a blue, downward-pointing arrow next to the message subject.



#### Request a Read or Delivery Receipt



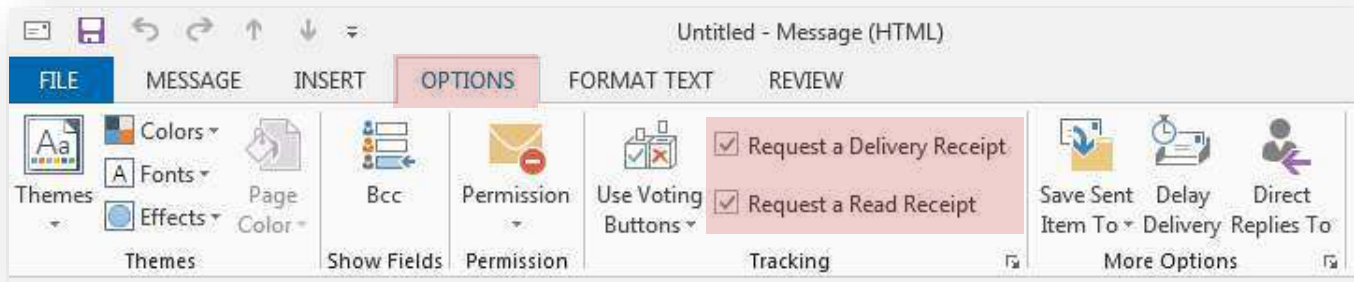
Not Applicable

In Outlook 2013, you can request delivery and read receipts when you send a message. That way, you can track when a recipient receives and reads the message.



Note: Read receipts only work if your recipient's email program supports them.

1. In the Message window, click the **OPTIONS** tab on the Ribbon.
2. Select *Request a Delivery Receipt* and/or *Request a Read Receipt* in the Tracking group.



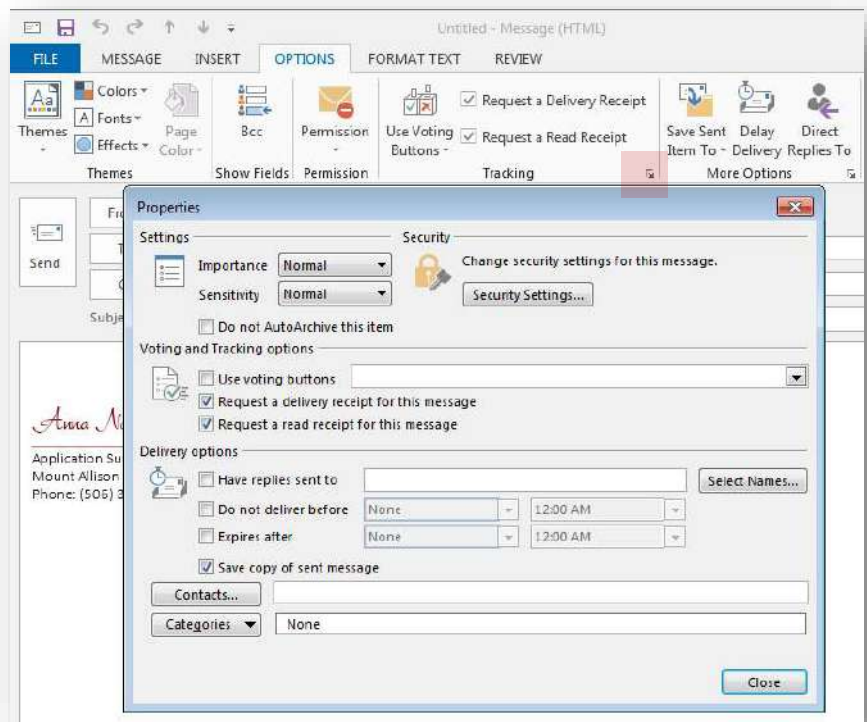
**Request a Delivery Receipt:** Sends a notification when the message has been successfully delivered.

**Request a Read Receipt:** Sends a notification when the recipient has opened the message.

*Tip!* Don't rely too heavily on read receipts; the recipient has the option to deny returning a receipt.

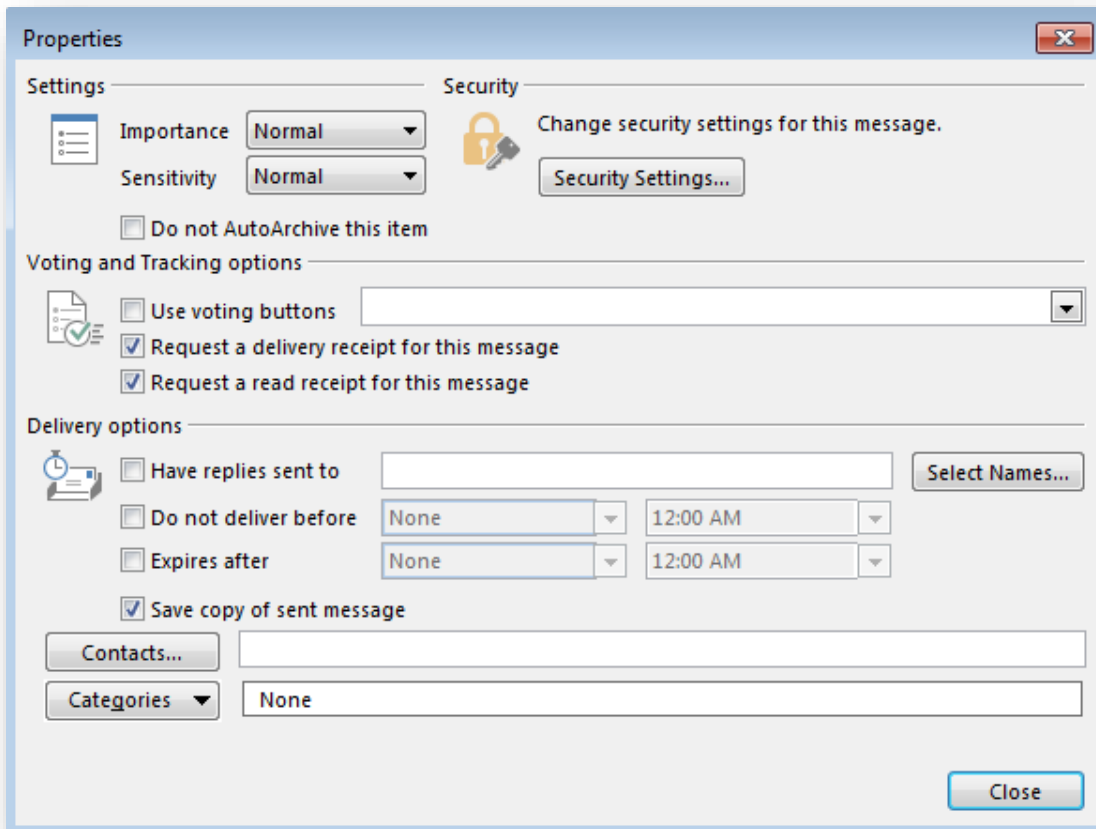
### Other Ways to Request Receipts

Click the **OPTIONS** tab on the Ribbon and click the Dialog Box Launcher in the Tracking group. Under Voting and Tracking options, select *Request a delivery receipt for this message*, *Request a read receipt for this message*, or both. Click Close when you're finished.



### Other Options

You might have noticed a variety of other message options on the Ribbon or in the Properties dialog box.



<b>Importance</b>	Specifies whether the message is of high, normal, or low importance.
<b>Sensitivity</b>	Displays a tag indicating how the recipient should treat the message.
<b>Security Settings</b>	Encodes the message so it is not readable by anyone except the intended recipient(s).
<b>Use voting buttons</b>	Allows the recipient to quickly answer a sender's question by use of voting buttons. Outlook can then tabulate the results of the vote for the sender.
<b>Request a delivery receipt</b>	Returns a message to you verifying the date and time the message arrived at the Inbox of the recipient.
<b>Request a read receipt</b>	Returns a message to you verifying the date and time the message was opened by the recipient.
<b>Have replies sent to</b>	Sends all replies to the message to someone else, such as an assistant.
<b>Do not deliver before</b>	Waits to send the message until the date and time you specify.
<b>Expires after</b>	Makes the message unavailable after a specified date and time.
<b>Save sent message to</b>	Saves a copy of the sent message in the specified folder.

## Formatting Text

Outlook can send and receive email messages in three message formats:



Options Tab

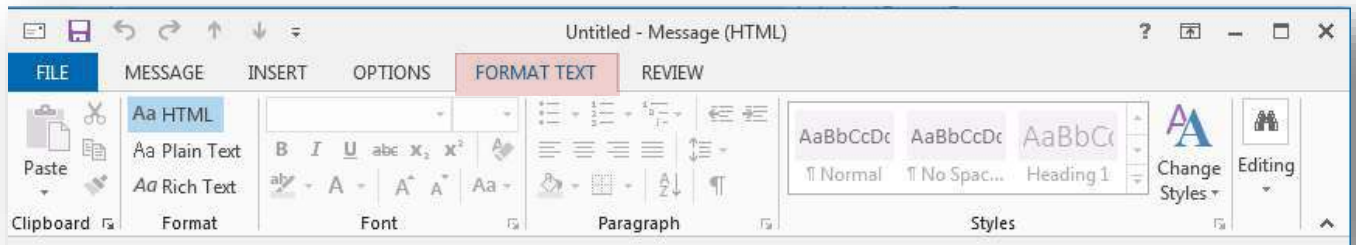
**HTML:** Supports paragraph styles (including numbered and bulleted lists), character styles (such as fonts, sizes, colors, weight), and backgrounds (such as colors and pictures). Most (but not all) email programs support the HTML format. Programs that don't support HTML display these messages as Plain Text.

**Rich Text:** Supports more paragraph formatting options than HTML, including borders and shading, but is compatible only with Outlook and Exchange Server. Outlook converts Rich Text messages to HTML when sending them outside of an Exchange network.

**Plain Text:** Does not support the formatting features available in HTML and Rich Text messages but is supported by all email programs.

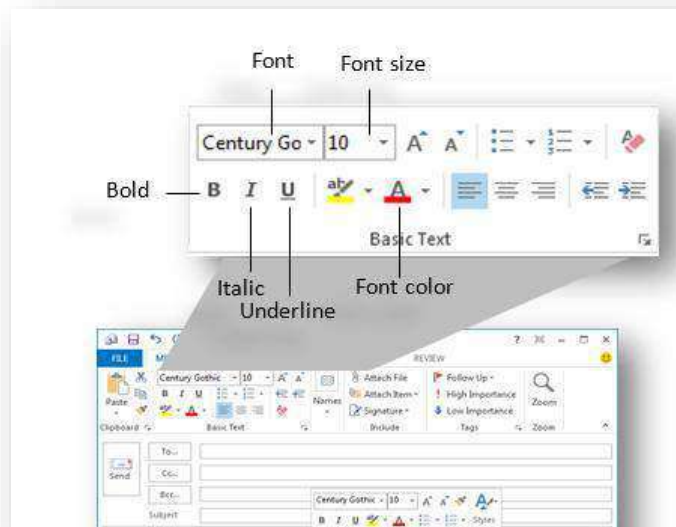


*You cannot format message text if your message format is set to Plain Text. To see which message format you are using, click the **FORMAT TEXT** tab on the Ribbon.*



Email message content isn't limited to simple text. You can create almost any type of content in an email message that you can in a Microsoft Word document. Because Outlook 2013 and Word 2013 share similar commands, you might already be familiar with processes for creating content such as lists and tables.

You can personalize your messages by using an individual font style or color and by inserting your contact information in the form of an email signature or business card.



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## Checking your Spelling

It's a good idea to spell-check your messages before you send them. Not only do spelling errors make you look unprofessional, they also reflect poorly on your product or organization.

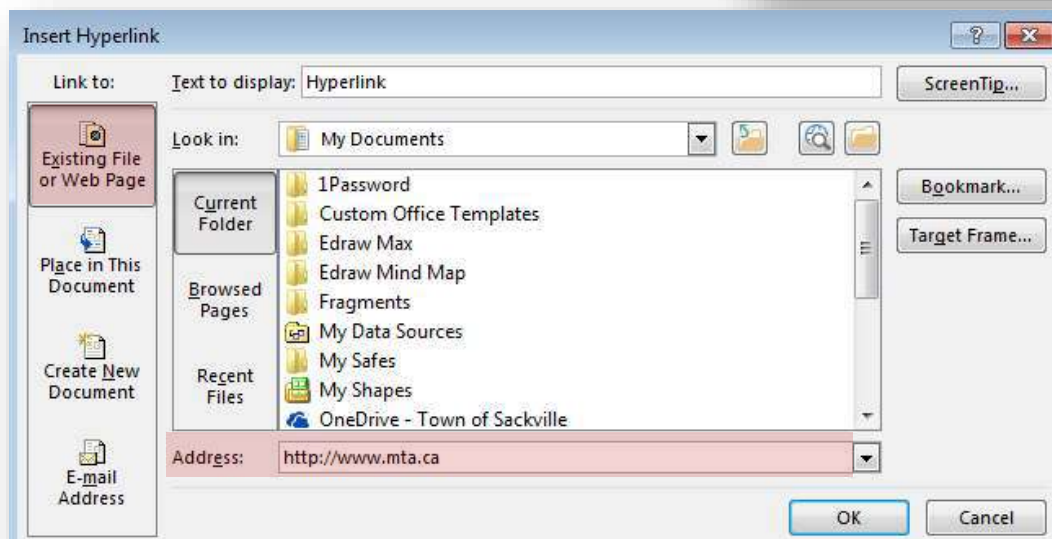
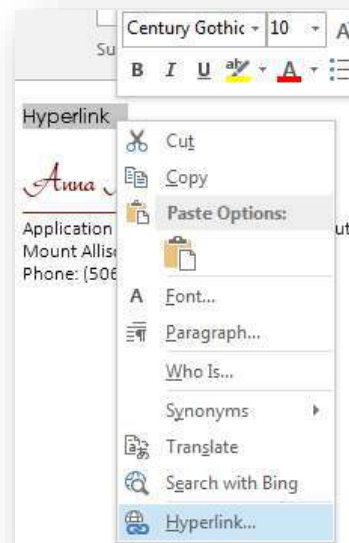
By default, Outlook checks for spelling errors as you type, underlining misspelled words in red. This makes it easy to correct spelling errors individually.

1. In the message window, **right-click the misspelled word**. A contextual menu appears, offering suggestions for the correct spelling of the word.
2. Select the correct spelling of the word from the contextual menu.
3. Outlook corrects the spelling of the word and the red underline disappears.

## Working with Hyperlinks

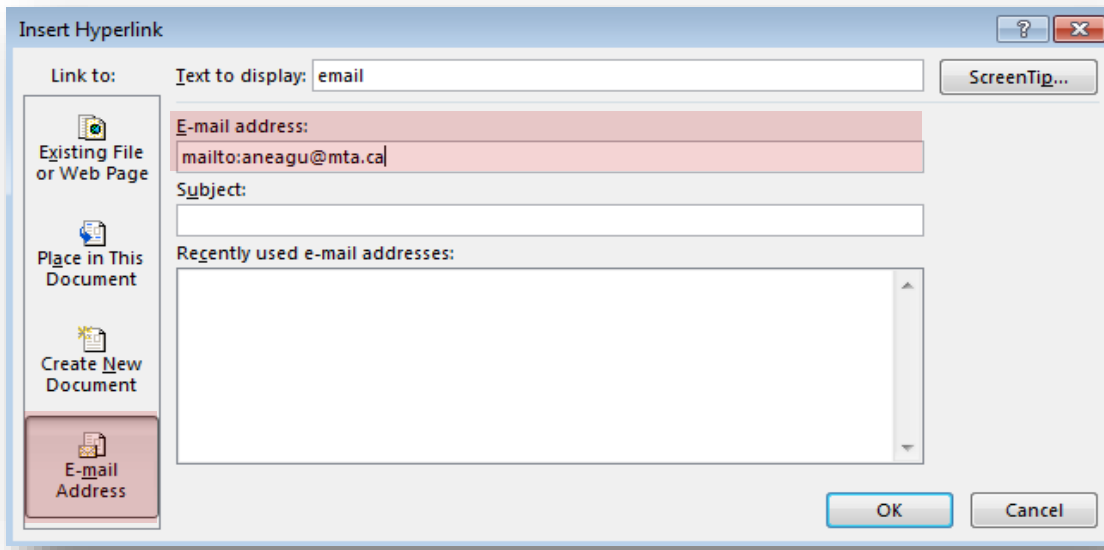
A hyperlink is a dynamic word or icon that, when clicked, opens a specific file or location. You can create a hyperlink to a Web page, picture, document, and more.

1. In the body area of the message, select the area where you want to insert the hyperlink.
2. Right click on your selection and choose **Hyperlink** option.
3. Type the Web address of the **page** you want to link to in the address area.
4. Click **OK**.



### To Insert Email address hyperlink to your document

1. Select text that you want to add email hyperlink.
2. Right click on and choose **Hyperlink**.
3. Go to **E-mail Address** tab.
4. Insert **E-mail address** and **Subject** of your emails.
5. Click **OK**.



### Inserting a Signature

A *signature* is boilerplate text or a file that can be attached to an email message. Your signature appears at the bottom of any new messages you compose and can include such things as:

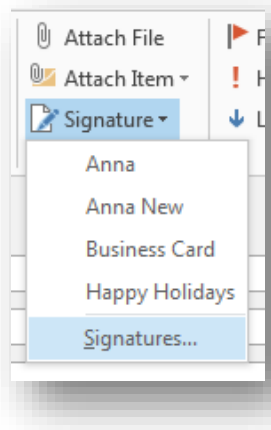
- Your name, title, and organization
- Your phone and fax number
- Your address
- A link to your Web page
- Your organization's mission statement, a witty one-liner, or your favorite quote.



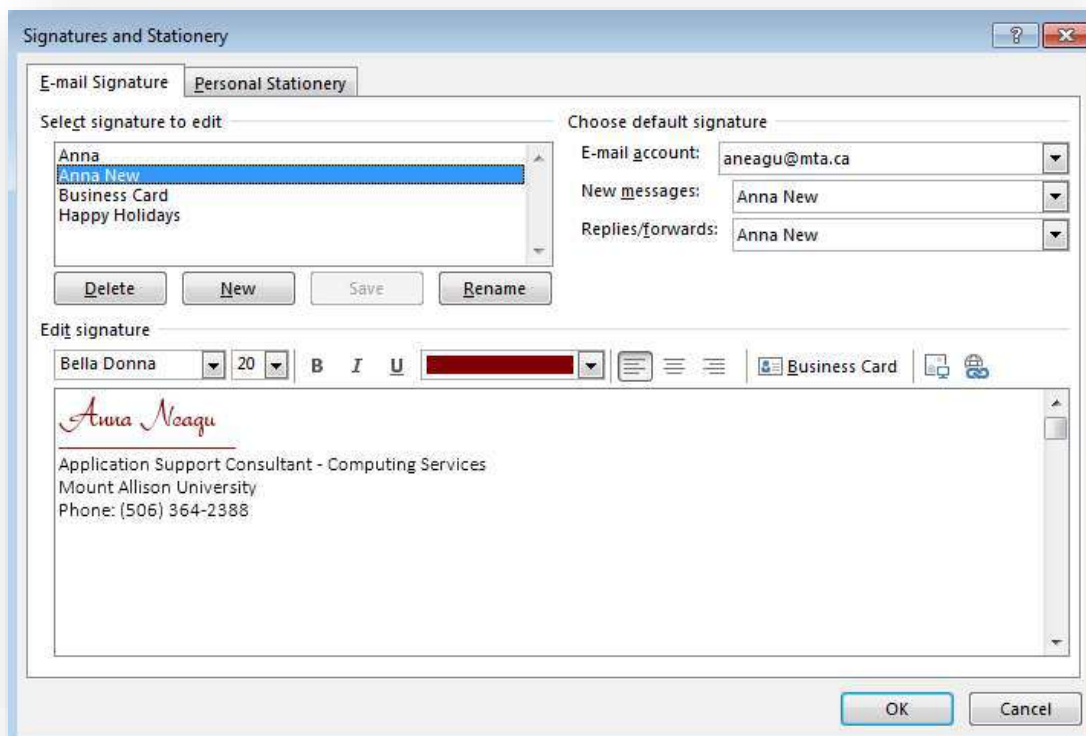
## Create a signature



Message Tab / Signature / Edit Signatures



1. Create a new message. A new message window appears.
2. Click the **MESSAGE** tab on the Ribbon. Click the **Signature** button in the Include group and select **Signatures**. The E-MAIL SIGNATURE tab of the Signatures and Stationery dialog box appears.
3. Click the **New** button. The New Signature dialog box appears.
4. Enter a name for the signature and click **OK**. Now create the signature as you want it to appear.
5. Type the text that you want to appear in the signature in the **Edit signature** area.
6. Click **OK**.

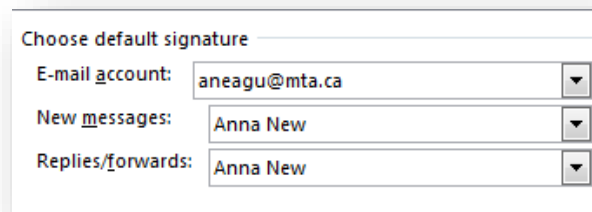


The next time you create a new message, your signature will appear at the bottom of the message.

## Set signature defaults

You can choose a default signature, you can choose which email account, as well automatically use it – for new messages, replies and forwards.

1. Specify how you want to use the signature in the “**Choose default signature**” section. Selecting different signatures for each one of these actions is possible.



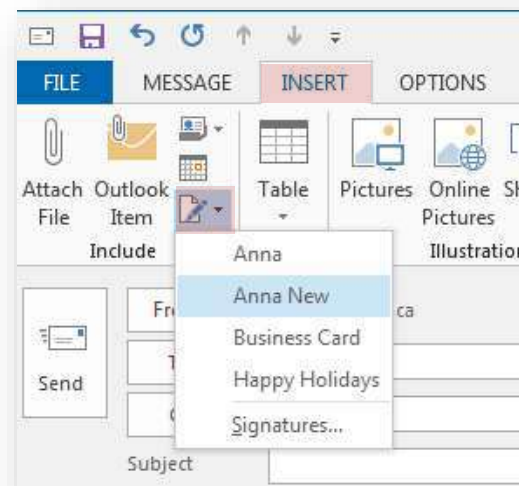
Edit Signatures / Default Signature

2. Click **OK**.

### Insert a signature manually

If you want to insert a different signature, or you don't have a default signature, you can also insert signatures manually.

1. Create a new message. A new message window appears.
2. In the Message window, click the **INSERT** tab on the Ribbon.
3. Click the Signature button in the Include group and select the signature you want to insert from the list.

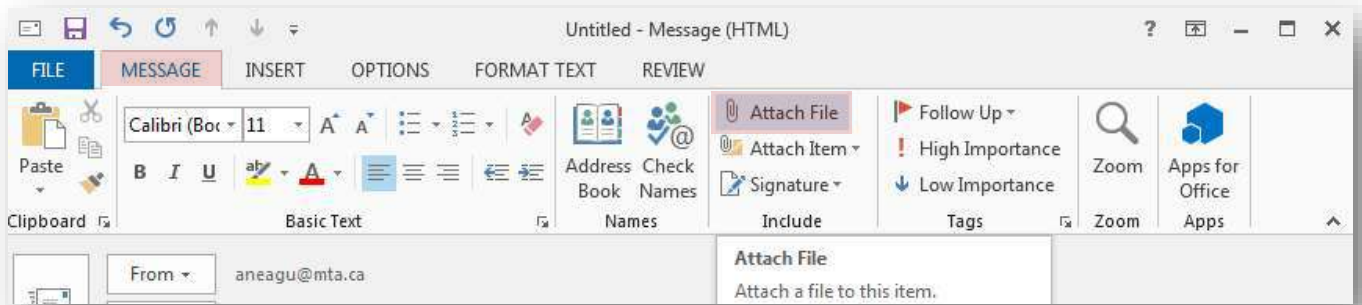


The signature is inserted into the message.

### Attaching a File to a Message

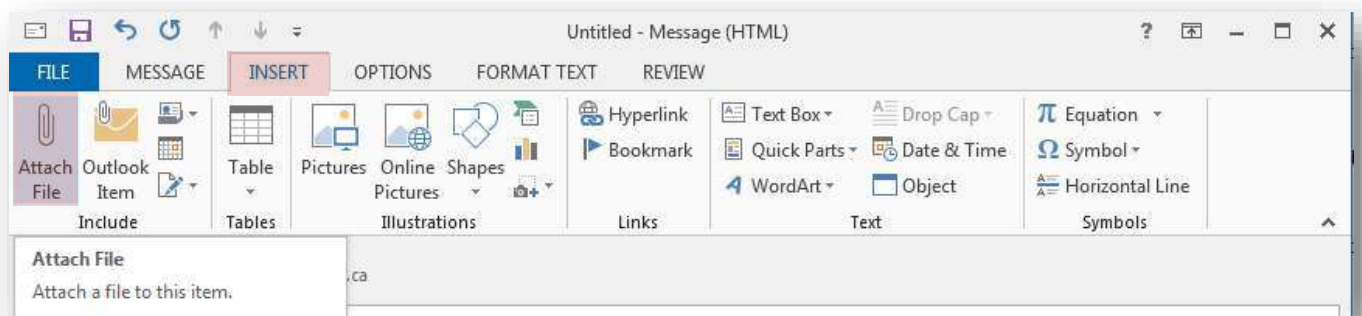
A convenient way to distribute a file (such as a Microsoft PowerPoint presentation, Excel workbook, Word document, or picture) is by attaching the file to an email message. Message recipients can preview or open the file from the Reading Pane, open it from the message window, forward it to other people, or save it to their computers.

1. In the Message window, click the **MESSAGE** tab on the Ribbon and click the **Attach File** button in the Include group. The Insert File dialog box appears.
2. Navigate to and select the file you want to insert and click **Insert**. The selected file is attached to the message.



## Other Ways to Attach a File

In the Message window, click the **INSERT** tab on the Ribbon and click the **Attach File** button in the Include group.



## Attach other items

You can also attach other items to a new Mail message, such as another email, an appointment, or a contact's Business Card.

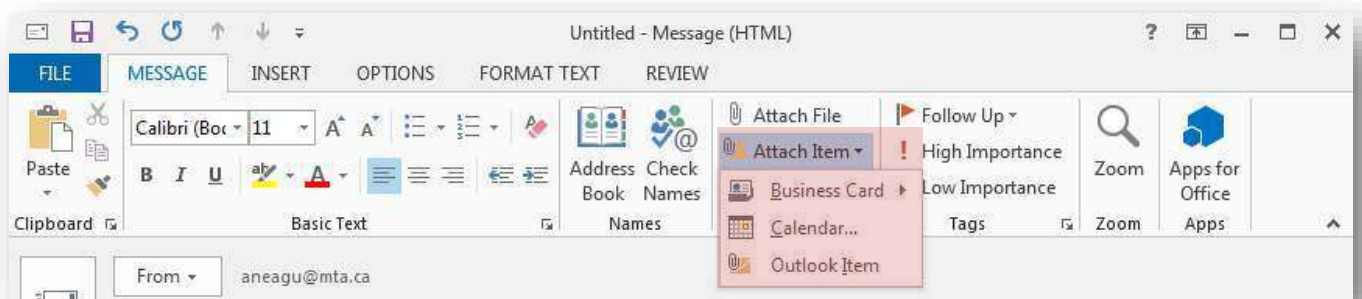
1. In the Message window, click the **MESSAGE** tab on the Ribbon and click the **Attach Item** button in the Include group.

A list of items appears, including:



Drag and drop contact, email, etc.

- Business Card:** Select this option to include a Business Card from your Contact list.
  - Calendar:** Select this option to include your free/busy information.
  - Outlook Item:** Select this option to include an Outlook item, such as an e-Mail, appointment, or task.
2. Select the type of item you want to attach and follow the prompts if necessary.



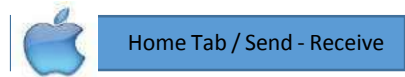


## Receiving and Reading Email

Each time you start Outlook and connect to your email server, any new messages received since the last time you connected appear in your Inbox.

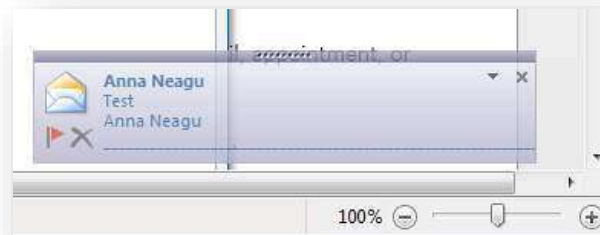
If you don't want to wait for Outlook to retrieve your messages, you can check for messages manually.

3. Click the **MAIL** button in the on the bottom Navigation Bar. The Inbox appears.
4. Click the **SEND/RECEIVE** tab on the Ribbon and click the **Send/Receive All Folders** button in the Send & Receive group. Outlook checks all accounts for messages. Any new, unread messages appear in **bold**.



When new messages, meeting requests, or task assignments arrive in your Inbox, Outlook alerts you in several ways so that you can be aware of email activity if you are using another application or if you've been away from your computer.

- A desktop alert appears on your screen for a few seconds, displaying the sender's information, the message subject, and the first few words of the message.



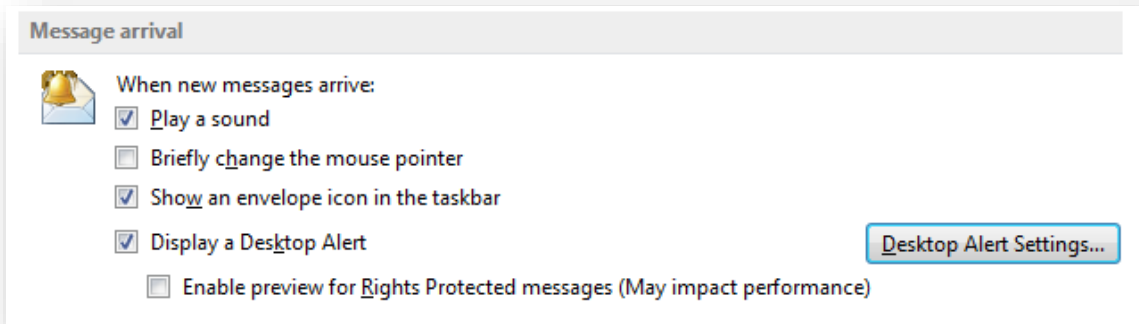
*You can open the message from the desktop alert.*

- A chime sounds.
- A New Mail Message icon appears on the Outlook taskbar button.  
You can configure Outlook to briefly change the shape of the mouse pointer to an envelope.

You can configure the individual notification options from the Mail page of the **Outlook Options** dialog box, **Mail Options**.

Icons displayed in the message header indicate optional information such as:

- The most recent response action taken.
- Whether files are attached.
- If it has been digitally signed or encrypted.
- If the sender marked it as being of high or low importance.



## Changing Views

There are three standard views of the message list:

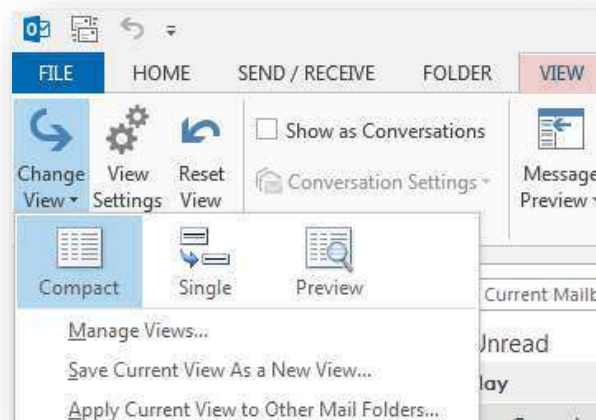
**Compact** This view displays two lines of message properties, including the read status, subject, sender, time received, whether files are attached to the message, and any color categories or follow-up flags associated with the message. This is the default view.

**Single** This one-line view displays the importance, reminder, item type or read status, whether files are attached to the message, sender, subject, received, size, category, and follow-up flags. The Reading Pane is open by default in this view.

**Preview** This view displays from one to four lines of information about each message. For every message, Preview view displays the same information as Single view. For each unread message, Preview view also displays a part of the message content—specifically, the first 255 characters (including spaces). If a message contains fewer than 255 characters, <end> appears in the preview text. The Reading Pane is closed by default in this view.

Changing a view lets you control the amount of information you see when you open your Inbox.

1. Click the **Mail** button in the Navigation Pane. The Inbox appears.
2. Click the **VIEW** tab on the Ribbon and click the **Change View** button in the Current View group.
3. Select a view from the list. The selected view is applied.



You can view the text of a message in several ways:

- You can open a message in its own window by double-clicking its header in the message list.
- You can read a message without opening it by clicking its header once in the message list to display the message in the Reading Pane.
- You can display the first three lines of each unread message under the message header by using the Preview feature. Scanning the first three lines of a message frequently gives you enough information to make basic decisions about how to manage it. The only drawback is that in Preview view, each unread message takes up five lines rather than the two lines in the default Messages view, so fewer messages are visible on your screen at one time.

### Opening an Attachment

Whenever you see a paper clip icon next to a message, the message contains an attachment.



*Never open an unfamiliar or suspicious attachment. Install a good anti-virus program on your computer and save files to your computer before opening them.*

You can view message attachments in several ways:

- You can preview certain types of attachments (including Word documents, Excel workbooks, PowerPoint presentations, and PDF files) directly in the Reading Pane by clicking the attachment (one time) in the message header.

When you click the attachment, the message text is replaced by a preview of the attachment contents, and the **Attachments** tool tab appears on the ribbon. To redisplay the message content, click the **Message** button that appears to the left of the attachments in the message header.



Open Email / Preview Option

The screenshot shows an Outlook interface with an email selected. The email header includes the sender 'Katherine DeVere...', the subject 'Excel Level 1 Pilot Session', and the recipient 'Hi Katherine...'. The attachment 'Practice Workbook - Level 1.xlsx' is highlighted. The preview shows a table with columns 'Item', 'Quantity', and 'Price Per Unit'.

Fine Arts Su		
Item	Quantity	Price Per Unit
Oil Paint	3	\$17.44
Acrylic Paint	5	\$20.14
Watercolor Paint	5	\$14.05
Markers	5	\$18.69

- You can open the attachment in the program assigned to that file type from the Reading Pane or from an open message window by double-clicking the attachment in the message header.

- You can save the attachment to your hard disk and open it from there. This strategy is recommended if you suspect an attachment might contain a virus, because you can scan the file for viruses before opening it (provided that you have a virus scanning program installed).

1. Right-click the attachment in the Reading pane.
2. Select **Save As** or **Save All Attachments** from the contextual menu.



*If you receive a contact record or business card as a message attachment, you can add it to your primary address book by dragging the attachment from the email message to the **Contacts** link or button on the Navigation Bar.*

## Replying to and Forwarding a Message

### Reply to a message

Replying to an email is like answering a letter; it acknowledges that you received the message and allows you to respond.

1. Click the **MAIL** button in the bottom Navigation Bar. The Inbox appears.
2. Double-click the message to which you want to reply. The message opens in its own window.
3. Click the **MESSAGE** tab on the Ribbon and click the **Reply** or **Reply All** button in the Respond group.
  - Reply**: Sends your reply to the author of the message only.
  - Reply All**: Sends your reply to the author of the message and everyone else who received the message.
4. Type your reply and click the **Send** button.

### Forward a message

Forwarding a message sends the message on to someone else instead of back to the original sender.

1. Click the **MAIL** button in the bottom Navigation Bar. The Inbox appears.
2. Double-click the message that you want to forward.
3. The message opens in its own window.
4. Click the **MESSAGE** tab on the Ribbon and click the **Forward** button in the Respond group.
5. In the **To** field, enter the e-Mail address(es) of the person(s) to whom you want to forward the message.
6. Type any comments you wish to add to the message and click the **Send** button.

**NOTE:** *All attachments and message options, such as "High Importance" tags, are included when you forward a message.*

## Forward As Attachment



Message / Attachment

Creates a blank message that contains no text but includes the original message as an attachment. The original message text and any attachments are available to the new recipient when he or she opens the attached message.

## Deleting a Message

When you're finished with a message, it's a good idea to delete it. Deleting messages as soon as you're done with them keeps your Inbox organized and free from clutter.

### Delete a message

1. Click the **Mail** button in the Navigation Bar and select the message you want to delete.
2. Press the **<Delete>** key. The message is removed from your Inbox and placed in the Deleted Items folder.

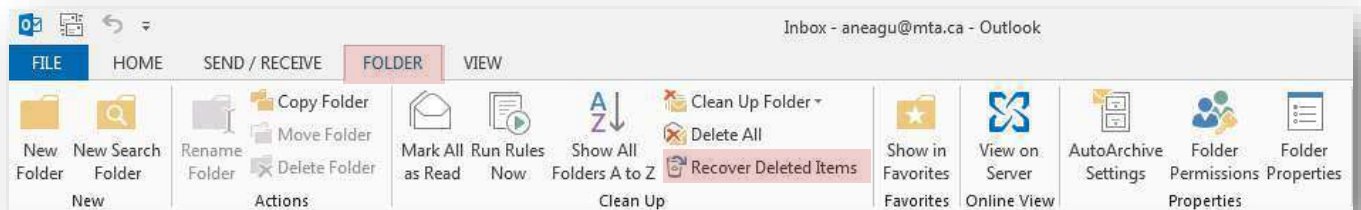
## Retrieve a message

Just like the Windows Recycle Bin, you can retrieve an item if you accidentally delete it.

1. Open **Outlook**.
2. Click on the **Folder** tab.
3. Select **Recover Deleted Items**.



Not Applicable / Workaround: OWA



4. Click the message you want to recover, and then check **Restore Selected Items**.
5. Click **OK**.



*To select multiple items, press **Ctrl** as you click each item, and then click **Recover Selected Items**. Recovered items are restored to the folder you're working in.*



*Items can only be recovered within **30 days** of when they were emptied from within "Deleted Items" folder. After this time elapses, items cannot be restored. Also, if items are purged from "Deleted Items" folder, they can no longer be recovered.*



*If a folder is deleted, it cannot be restored. Only messages can be restored (the folder structure cannot be restored). All messages will be restored to your inbox regardless of which folder they were deleted from.*



*Items within the recover utility will only show the message headers. The full message will be available after the message has been recovered.*

## Organizing Messages

Outlook 2013 automatically handles certain types of organization for you. You can organize items in Outlook by storing related items in folders and by assigning color categories to related items of all types. Outlook makes it easy to follow related messages from multiple people by displaying the messages in Conversation view. With Outlook Search, you can quickly locate items that contain specific content or meet specific criteria; you can save search results as Search Folders in which you can view up-to-date search results at any time.

### Flagging a Message for Follow-up



Similar to 2013

Flagging a message is an easy way to remind yourself to follow up on an important e-Mail or task. When you flag an item, a small icon appears next to the message, and a copy of the message is added to your To-Do List.

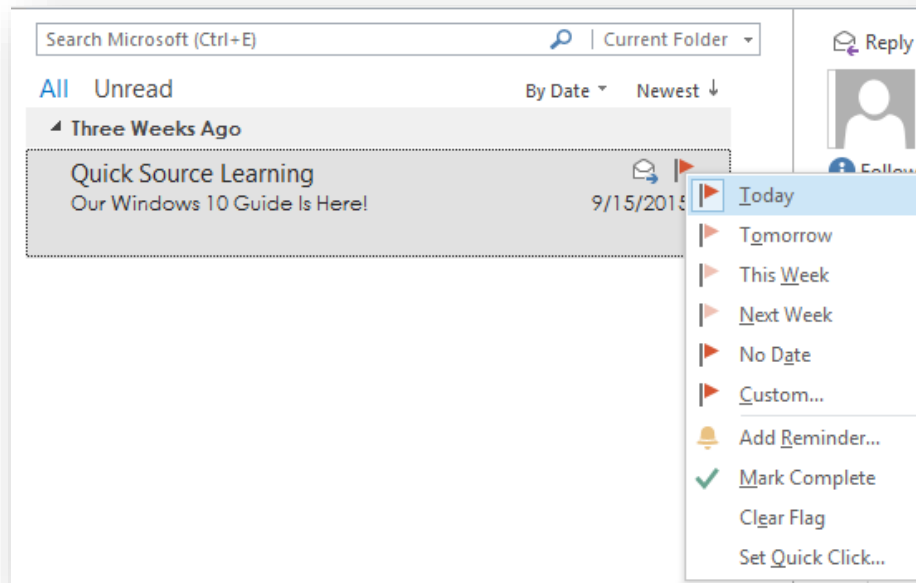
Flagging a message is extremely easy.

1. Click the **Mail** button in the Navigation Bar. The Inbox appears
2. Click the **Flag** area of the message you want to flag. The default flag—the Today flag—is applied to the message, and a copy of the message is added to your To-Do List.

### Change flags

The default flag is the Today flag, but there are several others flags from which to choose.

1. Click the message containing the flag you wish to change. You can also right-click the flag you wish to change and select a new flag from the contextual menu.
2. Click the **HOME** tab on the Ribbon and click the **Follow Up** button in the Tags group. A list of flags appears.
3. Select a flag from the list.



Description of the flags:

Flag	Start date	Due Date
Today	Current Date	Current Date
Tomorrow	Current date plus one day	Current date plus one day
This Week	Current date plus two days, but no later than the last work day of this week	Last work day of this week
Next Week	First work day of next week	Last work day of next week
No Date	No date	No date
Custom	Current date is displayed; choose a custom date if desired	Current date is displayed; choose a custom date if desired

### Remove a flag

Once you've followed-up on a flagged message, you can remove the flag or mark it as "Complete".

1. Right-click the flag you want to remove.
2. Select **Mark Complete** or **Clear Flag** from the contextual menu.

### Using Color Categories

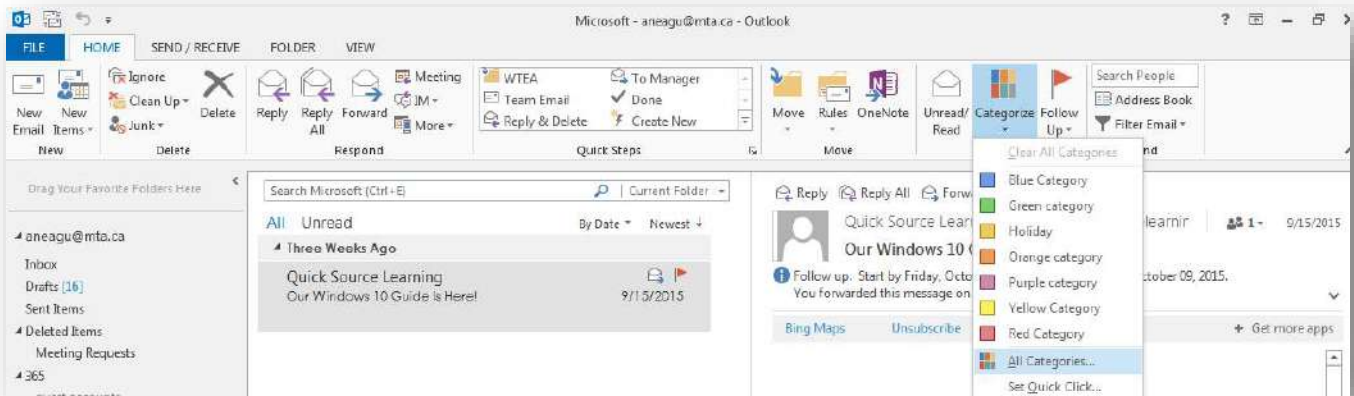


Color categories let you organize your Outlook items into specific groups, making the information they contain easier to distinguish. You can choose from a set of default categories, or you can create your own.

### Assign a color category

1. Click the **Mail** button in the Navigation Bar. The Inbox appears.

2. Select the message you wish to categorize
3. Click the **HOME** tab on the Ribbon and click the **Categorize** button in the Tags group. A list of categories appears.
4. Select a category from the list. The selected category is applied to the message.

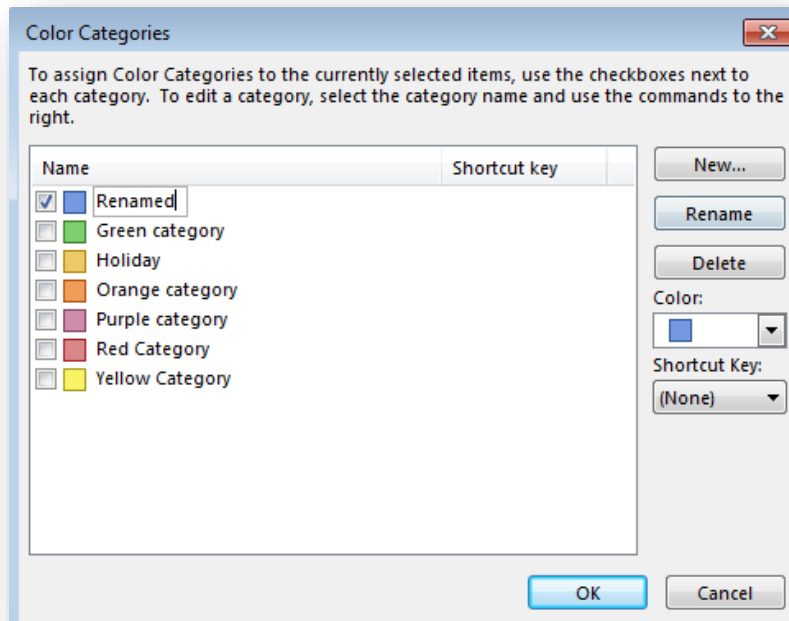


*tip!* You can assign multiple categories to a message.

### Rename a category

Outlook includes several color categories such as the “Red Category” or “Blue Category.” You can rename these categories to meet your needs.

1. Click the **Mail** button in the Navigation Bar. The Inbox appears.
2. Click the **HOME** tab on the Ribbon and click the **Categorize** button in the Tags group. A list of options appears.



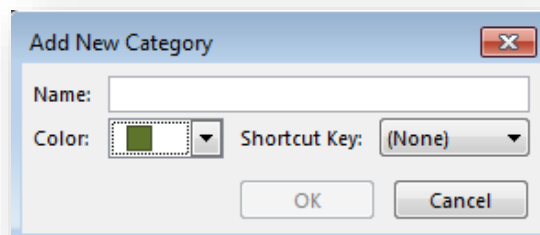


3. Select **All Categories** from the list. The Color Categories dialog box appears.
4. Click the color category you wish to rename and click **Rename**. The color category name becomes editable.
5. Type a new name for the category and click **OK** when you're finished. The category is renamed.

### Create a new category

Outlook may contain default categories, but you can create your own to better meet your needs.

1. Select **All Categories** from the list. The Color Categories dialog box appears.
2. Click **New**. The Add New Category dialog box appears. Here you can name the category, assign a new color, or create a keystroke shortcut.
3. Set the properties of the new category and click **OK**. The new category is added to the list of categories.



### Clear a category

If you decide you don't want to categorize a message after all, you can clear the category.

Right-click the message from which you wish to clear categories and select **Clear All Categories**.

### Viewing Conversations

Conversation view is an alternative arrangement of messages grouped by subject. All the messages with the same subject appear together in your Inbox (or other message folder) under one conversation header.

The conversation header provides information about the messages within the conversation, including the number of unread messages and whether one or more messages includes an attachment, is categorized, or is flagged for follow up.

- When you receive a message that is part of a conversation, the entire conversation moves to the top of your Inbox and the new message appears when you click the conversation header.
- When a conversation includes unread messages, a blue vertical line appears to the left of the header and the conversation subject is in bold blue font, just as an unread message would appear.
- When you have multiple unread messages, the number is indicated in parentheses following the subject. The senders of the unread messages are listed below the subject.



## Turn on Conversation View

When Conversation View is enabled, Outlook groups messages with the same subject into conversations.

1. Click the **Mail** button in the Navigation Bar. The Inbox appears.
2. Click the **VIEW** tab on the Ribbon and click the **Show as Conversations** check box in the Conversations group. The Microsoft Outlook dialog box appears. You can apply Conversation View to the currently selected folder or to all folders.
3. Select the folder where you want to apply Conversation View. Conversation View is applied.



*Conversations are grouped by subject. If any message recipient changes the subject of a message, then that message becomes a new conversation.*



*If the Show Conversations check box is inactive, make sure that you have sorted your messages by Date (Conversation).*

## Change Conversation Settings

Changing Outlook's Conversation settings changes how Conversations are displayed.

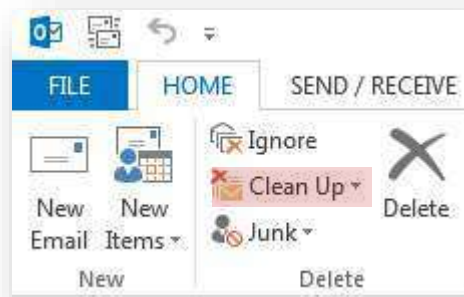
1. Click the **Mail** button in the Navigation Bar. The Inbox appears.
2. Click the **VIEW** tab on the Ribbon and click the **Conversations Settings** button in the Messages group. A list of options appears:

## Managing Conversations

Conversations can clutter your Inbox. You can keep your Inbox tidy by ignoring conversations you don't want to read or by cleaning up a conversation.

- Ignore Conversation.** This command moves the selected conversation and any related messages you receive in the future directly to the Deleted Items folder.
- Clean Up Conversation.** This command deletes redundant messages—messages whose text is wholly contained within later messages—from a conversation. By default, Outlook doesn't clean up categorized, flagged, or digitally signed messages. You can modify conversation clean-up settings on the Mail page of the Outlook Options dialog box.

1. Click the **Mail** button in the Navigation Bar. The Inbox appears.
2. Click the conversation you wish to ignore / clean up.
3. Click the **HOME** tab on the Ribbon and click the **Ignore / Clean up** button in the Delete group.



## Troubleshooting Conversation View

As with many features, Conversation view has its fans and its detractors. Because Conversation view displays only unique messages until you fully expand the conversation, a specific message that you're looking for might not be immediately visible. If this happens, you can turn off Conversation view (by clearing the Show In Conversations check box in the Conversation group on the View tab) and then use one of the following methods to locate the message you want to find:

- Sort the messages by subject, and then type the first few letters of the message subject to scroll those messages to the top of the message list.
- Enter the subject into the Search box at the top of the message list and then specify any other criteria (such as the sender or date) of the message that you're looking for to narrow the results.

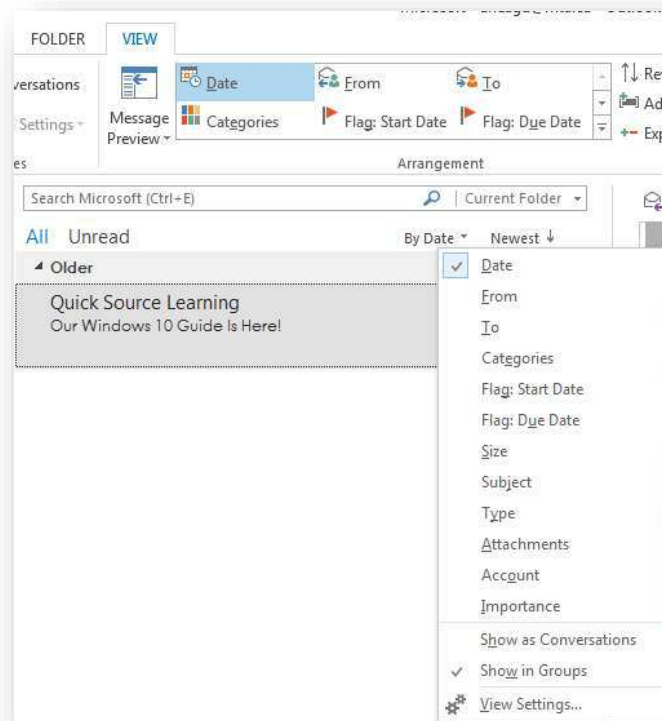
## Sorting Messages

When your Inbox is jam-packed with messages, it can be difficult to find anything. When this happens, try sorting your messages using Outlook's arrangement options. You can sort your messages by the date they were sent, who sent them, and other attributes.

1. Click the Mail button in the Navigation Bar. The Inbox appears.



Organize Tab / Arrange By



2. Click the **VIEW** tab on the Ribbon and select an arrangement from the Arrangement group. Alternatively, you can click the current arrangement in the message list header, and then click the arrangement or option you want.

By default, Outlook displays messages arranged by date, from newest to oldest. Alternatively, you can arrange items by any of the following attributes:

**Account.** Messages are grouped by the email account to which they were sent. This is useful if you receive messages for more than one email account in your Inbox.

**Attachments.** Messages are grouped by whether they have attachments and secondarily by date received.

**Categories.** Messages are arranged by the category you assign them to. Messages without a category appear first. Messages assigned to multiple categories appear in each of those category groups.

**Flag: Start Date or Due Date.** Unflagged messages and messages without specific schedules appear first. Messages that you've added to your task list with specific start or due dates are grouped by date.

**From.** Messages appear in alphabetical order by the message sender's display name. If you receive messages from a person who uses two different email accounts, or who sends messages from two different email clients (for example, from Outlook and from Windows Mail), the messages will not necessarily be grouped together.

**Importance.** Messages are grouped by priority: High (indicated by a red exclamation point), Normal (the default), or Low (indicated by a blue downward-pointing arrow).

**To.** Messages are grouped alphabetically by the primary recipients (the addresses or names on the To line). The group name exactly reflects the order in which addresses appear on the To line.

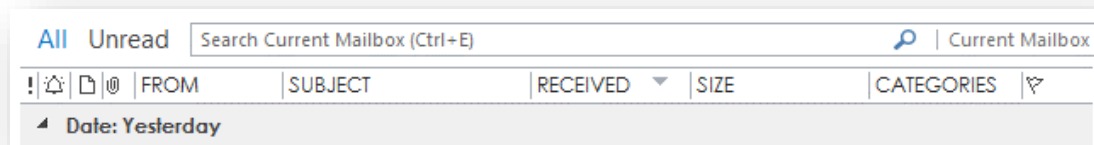
**Size.** Messages are grouped by size of the message, including any attachments. Groups include Huge (1–5 MB), Very Large (500 KB–1 MB), Large (100–500 KB), Medium (25–100 KB), Small (10–25 KB), and Tiny (less than 10 KB). This feature is useful if you work for an organization that limits the size of your Inbox, because you can easily locate large messages and delete them or move them to a personal folder.

**Subject.** Messages are arranged alphabetically by their subjects and then by date. This is similar to arranging by conversation except that the messages aren't threaded.

**Type.** Items in your Inbox (or other folder) are grouped by the type of item—for example, messages, encrypted messages, message receipts, meeting requests and meeting request responses, tasks, Microsoft InfoPath forms, and server notifications.

After arranging the items in your message list, you can change the sort order of the arrangement by clicking the sort order indicator that appears to the right of the message list header.

Each group has a header. You can expand or collapse an individual group by clicking the arrow to the left of the group name in the header.



Regardless of the view and arrangement you choose, you can sort messages by any visible column simply by clicking its column heading (and reverse the sort order by clicking the column heading a second time).

## Organizing Messages in Folders

To keep your Inbox content low and avoid an accumulation of unrelated messages, you can organize messages into folders. When you create a folder by clicking the **New Folder** button on the Folder tab of any module, you specify the location of the folder within your existing Outlook folder structure and the type of items you want the folder to contain.

You can move messages to folders manually, or if your organization is running Exchange, you can have the email system move them for you. You can automatically move messages to another folder by creating a rule—for example, you can automatically move all messages received from your manager to a separate folder. You can also set up different rules that go into effect when you're away from the office.

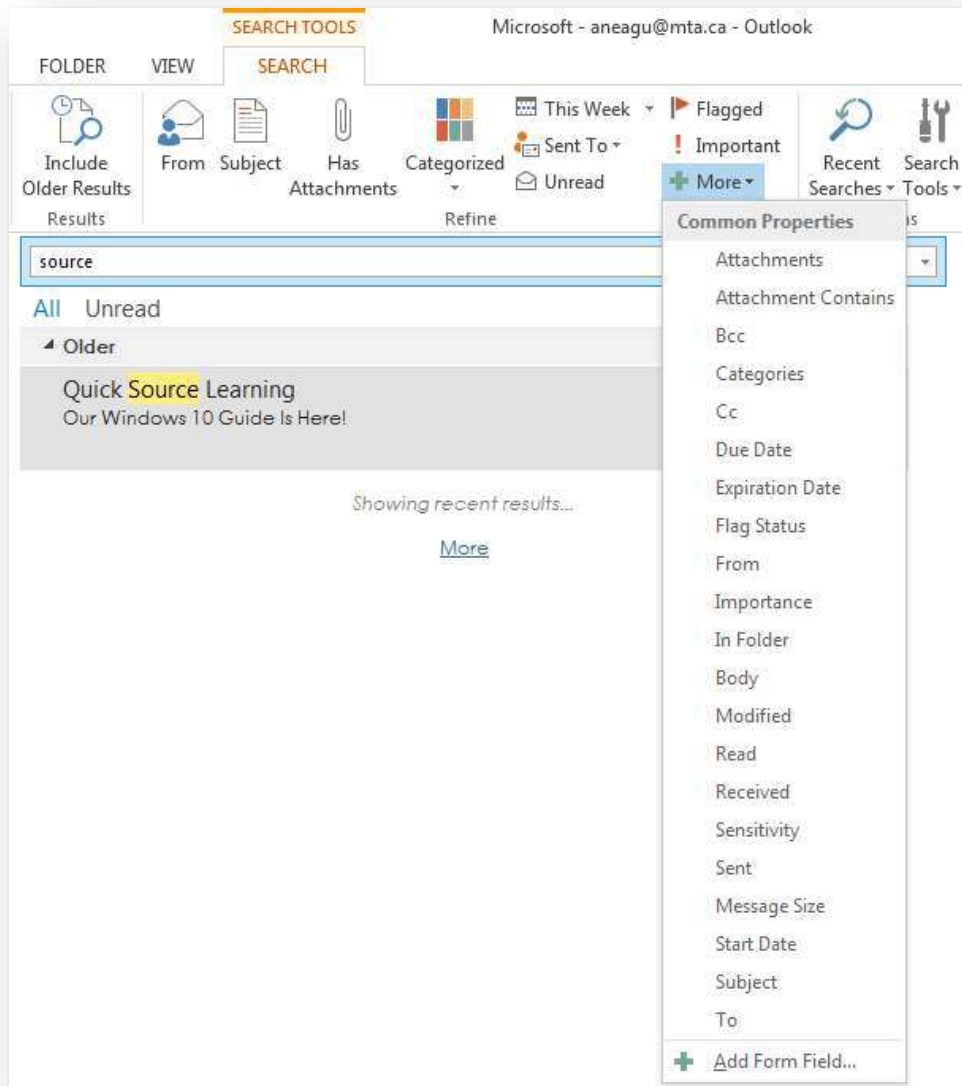
## Quickly locating messages

You can use the **Search** feature to locate specific terms in any Outlook item. Although you can search for items in the Calendar, People, Tasks, and Notes modules, you most often use it to locate messages in your Inbox and other mail folders.

The Search feature can locate search terms in a message or in a file attached to a message. As you enter a search term in the Search box located at the top of the content area in any module, Outlook filters the items to show only those items in the module that contain the search term and highlights the search term in the list of results.

Outlook first displays up to 30 “recent results.” Clicking the **More** link at the bottom of the list or the Include Older Results button in the Results group on the Search tool tab displays additional results within the selected search scope.





The Search tool tab appears when you activate the Search box in any Outlook module. You can enter search terms into the Search box and refine your search by using the commands on the Search tool tab.

### Using Search Folders

A Search Folder displays all the messages in your mailbox that match a specific set of search criteria, no matter which folders the messages are actually stored in. When you create a Search Folder, it becomes part of your mailbox and is kept up to date. The Search Folder module is located in the Folder Pane, within your top-level mailbox, at the same level as the Inbox.

If you want quick access to messages that fit a specific set of criteria, you can create a custom Search Folder. To do so, follow these steps:

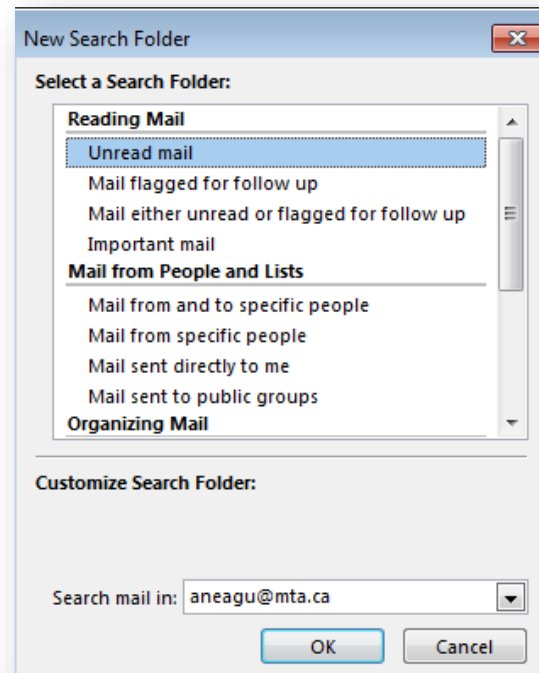
1. Display any mail folder.



2. On the Folder tab, in the New group, click **New Search** Folder to open the New Search Folder dialog box.



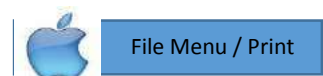
Search Folder categories include Reading Mail, Mail from People and Lists, Organizing Mail, and Custom.

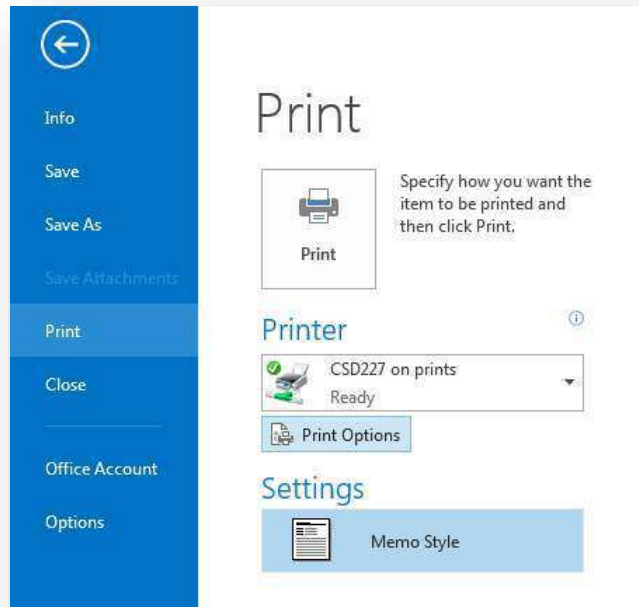


## Printing Messages

Sometimes it can be refreshing to read a message in hard copy, especially if the message is long. Printing a message in Outlook is extremely easy.

1. Click the **Mail** button in the Navigation Bar. The Inbox appears.
2. Select the message you want to print.
3. Click the **FILE** tab and select **Print**.
4. Click the **Print Options** button.





If necessary, you can adjust the following settings:

**Printer** Select an installed printer or add a new one.

**Print Options** Change the default printing options in the Print dialog box before printing. You can also change an existing print style (the way the message is presented on the printed page) or create a new one.

**Settings** Choose from the existing print styles available for the selected message or other Outlook item. The default print style is Memo style, which prints your name, the message header information, and then the message content.

5. Click **Print** to begin printing.



## Working with Contacts

### IN THIS CHAPTER

- Address Books
- Adding a Contact
- Editing and Deleting a Contact
- Viewing and Sorting Contacts
- Adding a Contacts Folder
- Creating a Contact Group
- Printing Contact Records

*Having immediate access to current, accurate contact information for the people you need to interact with—by email, phone, mail, or otherwise—is important for timely and effective communication. You can easily build and maintain a detailed contact list, or address book, in the Microsoft Outlook 2013 People module. From your address book, you can look up information, create messages, and share contact information with other people. You can also keep track of your interactions with a person whose contact information is stored in Outlook.*

### Address Books

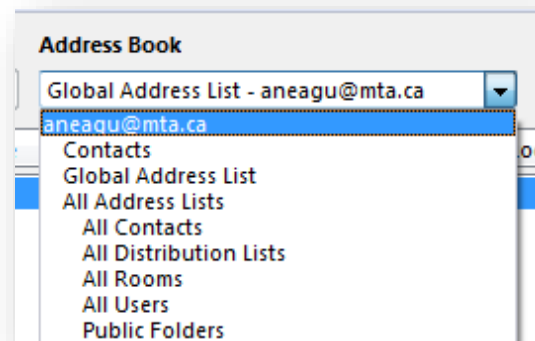
The Address Book can get its information from one or more sources, including Internet directory services and third party address books. Here are the two most common sources that the Address Book uses:

**Global Address List** If you use Outlook in a networked environment, the Global Address List contains your organization’s users, groups, and contact groups. The Global Address List is similar to a large telephone directory that is available for everyone to use. A network administrator usually manages the Global Address List, so you can’t make any changes to it.

**Outlook Address Book** The Contacts address book of your default email account is your main address book, and it is the address book that appears by default in the People module. The Contacts address book is empty until you add contact records to it.



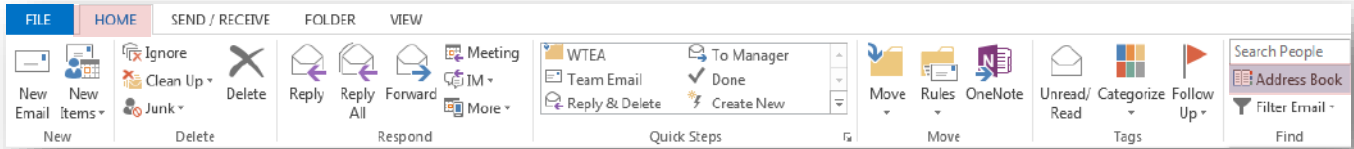
Home Tab / Contact Search



### Open the Address Book

It doesn’t matter if you’re working with e-Mail or the calendar—you can always find the Address Book.

1. Click the **HOME** tab on the Ribbon and click the **Address Book** button in the **Find** group. The Address Book appears. By default, names from your organization are displayed from the Global Address List.
2. Click the **Close** button. The Address Book closes.

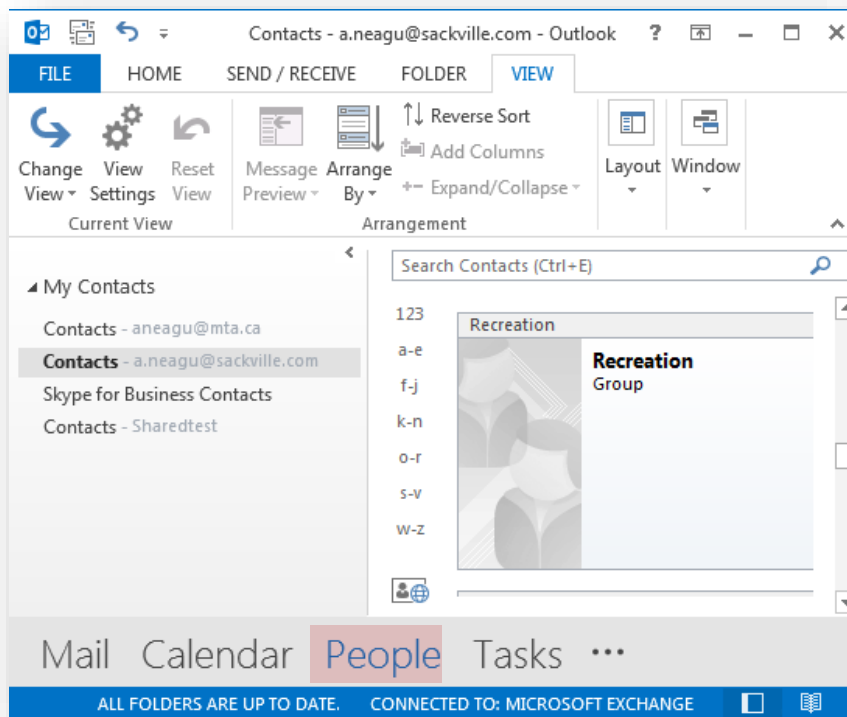


## Adding a Contact

The Contacts list contains information about people and organizations with whom you interact. You can enter as much or as little information about your contacts as you want in the Contacts list, including names, phone numbers, e-Mail accounts, and addresses.

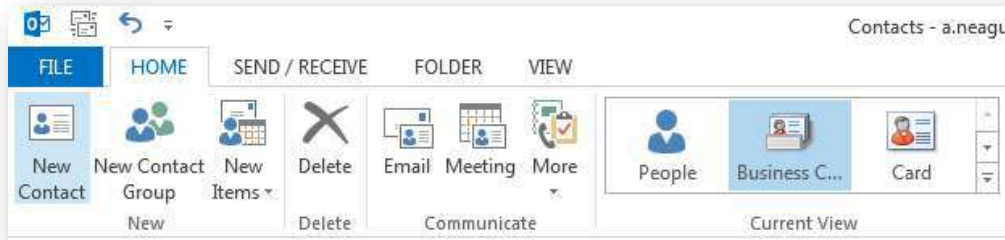
You can use the Contacts list with other Outlook tools. For example, you can schedule an appointment with or send an e-Mail to a contact. You can even use the Contacts list with other programs, such as software for an electronic organizer.

1. Click the **People** button in the Navigation Bar.

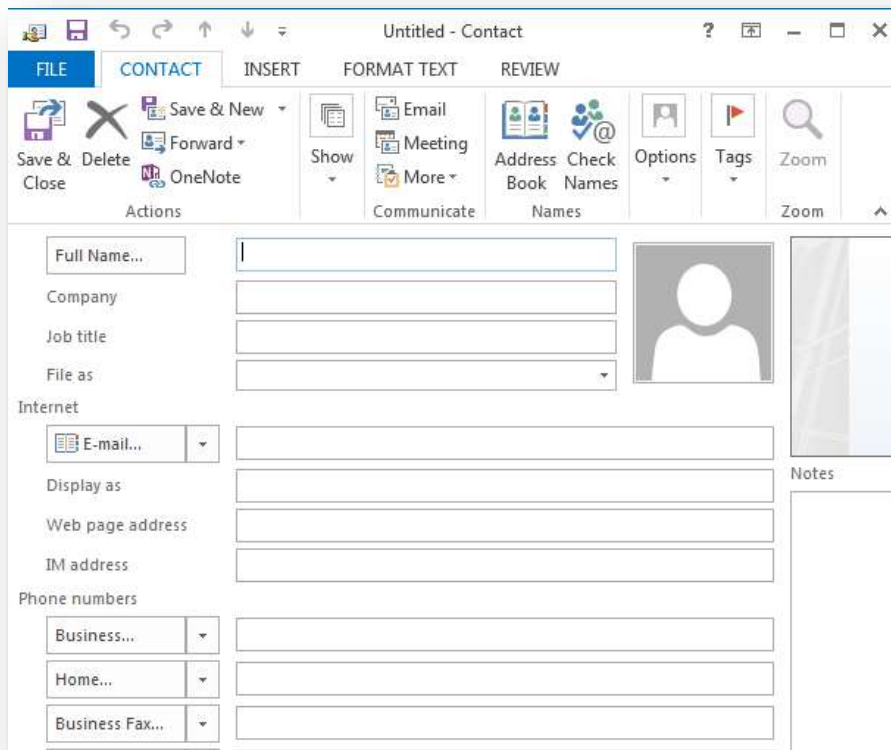


By default, the Contacts list appears in Business Cards view. In this view, your contacts are displayed as Electronic Business Cards, which look like actual paper business cards on the screen.

- Click the **HOME** tab on the Ribbon and click the **New Contact** button in the New group. The Untitled Contact window appears. You can enter the contact's name, company, job title, e-Mail address, Web page address, phone numbers, and/or addresses.



- Enter as much contact information as you want in the window.



*If you create a contact with the same name as another contact, the Duplicate Contact Detected dialog box appears. Here, you can add a new record if the contact is a new contact or update the contact's existing record.*



*Several of the fields in the Contact window have buttons and list arrows next to them. The buttons display dialog boxes to assist you with the fields, while the arrows are used if a contact has multiple phone numbers, e-Mail accounts, or addresses.*

4. Click the **CONTACT** tab on the Ribbon and click the **Save & Close** button in the Actions group. The Contact window closes and the new contact appears in the Contacts list.

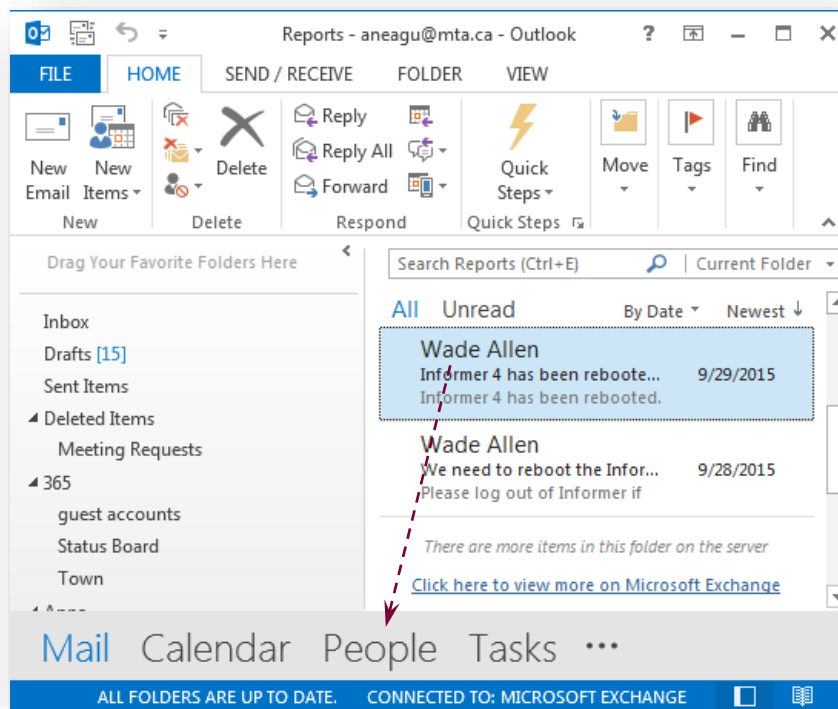
### Adding a Contact from an E-Mail



Not Applicable

You can add someone to your Contacts list using an e-Mail you've received. To add an e-Mail sender's name and e-Mail address to your Contacts list, simply drag the e-Mail to the People button in the Navigation Bar. Outlook will add the sender's name and e-Mail address to the Contacts list—and you can add any additional information yourself.

1. Click the **Mail** button in the Navigation Bar. The Inbox appears.
2. Click and drag the e-Mail to the **People** button in the Navigation Bar. The Contact window opens, and the person's name and e-Mail address are filled in automatically.



3. Enter any additional information for the contact.
4. Click the **CONTACT** tab on the Ribbon and click the **Save & Close** button in the Actions group.

### Editing and Deleting a Contact

It's easy to view and change information about your contacts. You can edit contact information by double-clicking a contact to open it in the Contact window, or you can edit information about a contact directly in the Contacts list. The latter method is more efficient; simply select the entry you wish to edit and make your changes.

## Edit a contact

1. Click the **People** button in the Navigation Bar. Outlook displays the Contacts list.
2. Double-click the contact you want to edit in the Contacts list. That person's contact window appears.
3. Make the necessary changes.
4. Click **Save**. The window closes and the changes to the contact's information are saved.

## Delete a contact

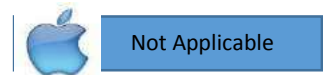
You can also delete contacts if you no longer need them.

1. Double-click the contact you want to delete in the Contacts list. That person's contact window appears.
2. Click the **CONTACT** tab on the Ribbon and click the **Delete** button in the Delete group. The contact is moved to the Trash folder in your Mailbox.

## Viewing and Sorting Contacts

Like other folders in Outlook, the Contacts list has several different ways to look at the same information. These different views are very useful when it comes to organizing the Contacts list.

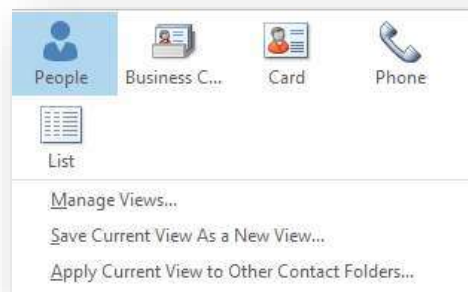
### Change Contacts list view



By default, contacts appear in Outlook in People view. In this view, *your contacts are displayed as an alphabetical list*.

Changing the Contacts view changes how much information is displayed about your contacts in the Contacts list. You can display more detailed information about each contact, such as with the Business Cards or Cards view. Or, you can display more contacts on the screen at once, such as with the Phone or List view.

1. Click the **People** button in the Navigation Bar. Outlook displays the Contacts list.
2. Click the **HOME** tab on the Ribbon.
3. Select the view you want to use from the **Current View** group. The new view is applied.



Each view presents information from your contact records either as cards or in a list:

**People** Displays only contact names in the contact list, and the available information for the selected contact in the Reading Pane. Contact names are displayed in alphabetical order by first or last name, depending on the File As selection. This view displays information about the contact from multiple sources. For example, if you have an Outlook contact record for a person you network with on LinkedIn and Facebook, the People card displays a compilation of the information from all three locations. This view, which is new in Outlook 2013, is the default view.

**Business Card** Displays the business card associated with each contact record—either the default card created by Outlook or a custom card if you have one. Business cards are displayed in the alphabetical order specified by the File As selection.

**Card** Displays contact information as truncated business cards that include limited information, such as job title and company name.

**Phone** Displays a columnar list that includes each contact's name, company, and contact numbers. You can choose the grouping you want from the Arrangements gallery on the View tab.

**List** Displays a columnar list with contact records arranged in groups. You can choose the grouping you want from the Arrangements gallery on the View tab.

In any list view, you can expand and collapse the groups or select and take action on an entire group of contacts. You can also enter information directly into any contact record field displayed in the list.

## Sort contacts

If you are working in Phone or List view, you can further sort your contacts by categories, company, or location.

1. Click the **People** button in the Navigation Bar. Outlook displays the Contacts list.
2. Click the **VIEW** tab on the Ribbon. There are three options for sorting your contacts:
  - Categories:** Organizes and sorts contacts by color category (if categories have been assigned to contacts).
  - Company:** Organizes and sorts contacts by company (if a company has been assigned to contacts).
  - Location:** Organizes and sorts contacts by location (if a location has been assigned to contacts).
3. Select an arrangement from the **Arrangement** group.

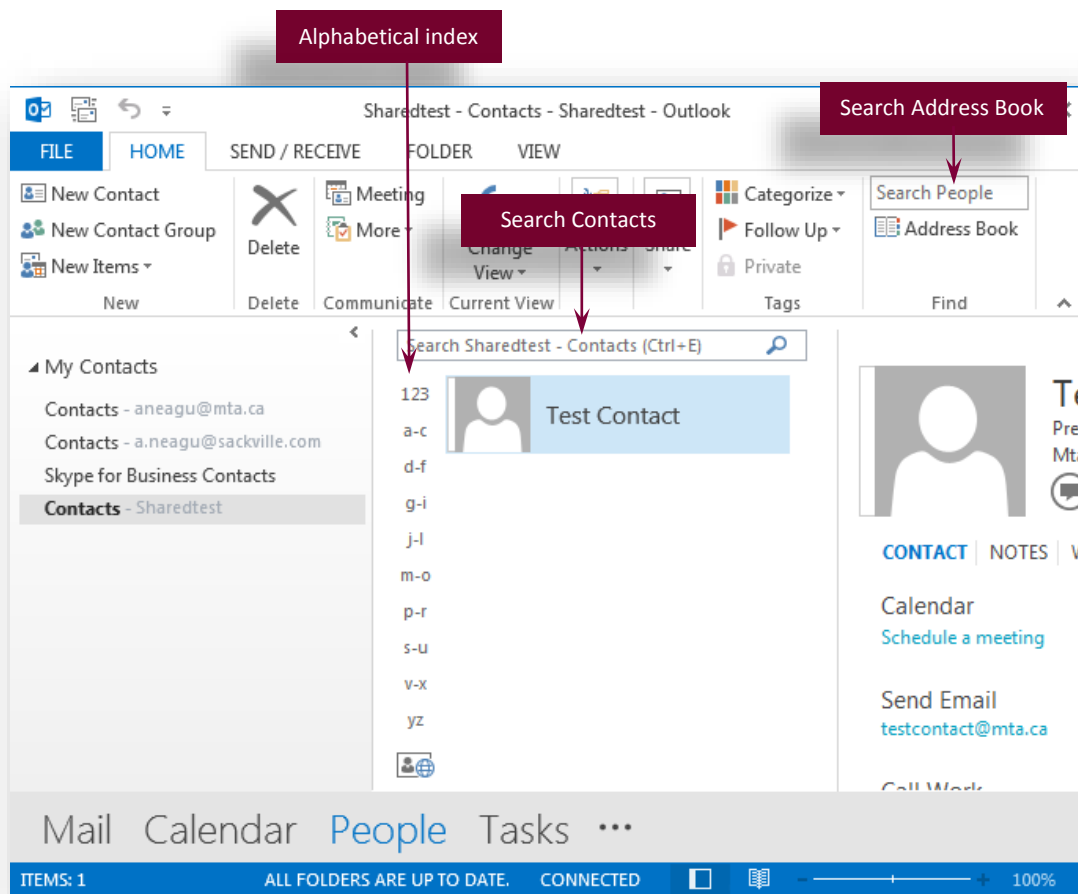


## Finding and Organizing Contacts

There are several ways to search for information in your contacts.

1. Click the **People** button in the Navigation Bar. The Contacts list appears. To find a contact or contact information, choose from the following search methods:

- ☑ **Search address books:** Click the **HOME** tab on the Ribbon, enter a contact's name or company name in the Search address books box in the Find group, and press **<Enter>**.
- ☑ **Instant Search (Search Contacts):** Just as you can search e-Mail messages using keywords, you can also search contacts. Enter search keywords (or even a phone number) in the **Search Contacts** box at the top of the Contacts list.
- ☑ **Alphabetical index:** If you are viewing your contacts in Business Cards or Cards view, click a letter button in the index that appears by the cards to display contacts beginning with that letter.
- ☑ **Sort table:** If you are viewing your contacts in a table view such as Phone view, click a column heading to sort the contacts by that column's criteria.



2. Select a search method and complete your search.

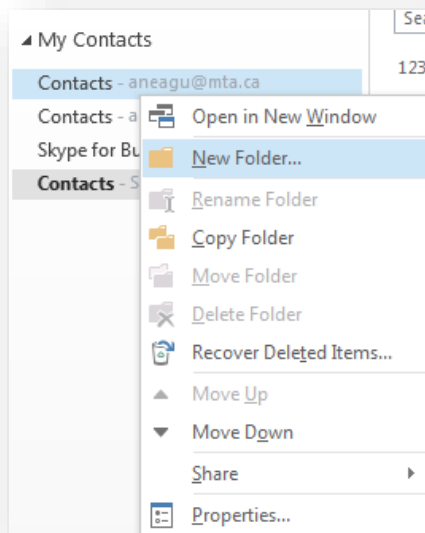
### Adding a Contacts Folder

You can organize your contacts by creating folders for specific categories of contacts.

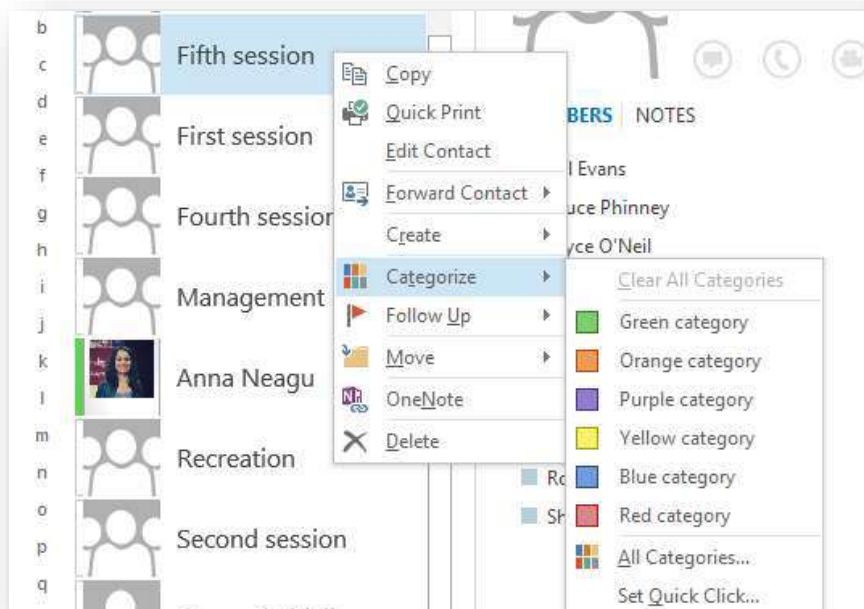
1. Click the **People** button in the Navigation Bar. The Contacts list appears.

2. Click the **FOLDER** tab on the Ribbon and click the **New Folder** button in the New group.
3. Enter a name for the new folder and make sure Contact Items is selected under the “Folder contains” list arrow.
4. Click **OK**. The new folder appears in the Navigation Pane under My Contacts. Now you can move contacts into the new folder.

Click and drag a contact from the Contacts list to the new folder’s icon in the Navigation Pane. The contact is moved to the new folder.



You can also organize contacts by assigning them to color categories. Right-click a contact in the Contacts list, point to **Categorize**, and select a category.





## Creating a Contact Group



Home Tab / New Contact Group

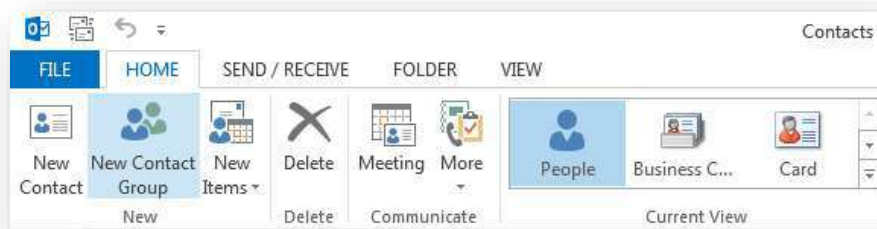
A contact group, known in previous versions of Outlook as a distribution list, lets you group e-Mail addresses together. A contact group can save you time when you have to send e-Mail to:

- All employees in the same department or organization.
- Colleagues on the same project or committee.
- A group of friends.

Contact groups appear in your Contacts list the same way that a person's name does. To address an e-Mail message using a contact group, follow the same steps that you would with any other message.

Before you can send e-Mails to recipients in a contact group, you need to create the group.

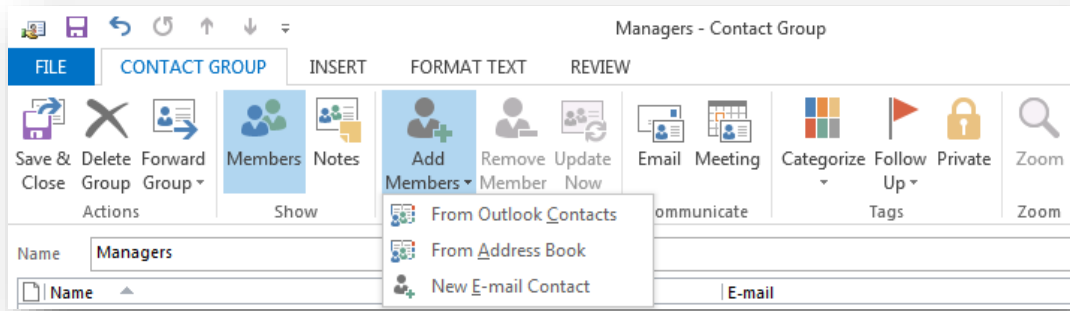
1. Click the **People** button in the Navigation Bar. The Contacts list appears.
2. Click the **HOME** tab on the Ribbon and click the **New Contact Group** button in the New group. The Untitled–Contact Group window appears.



3. Enter a name for the contact group in the Name text box. For example, you could name the contact group “Family” or “Management Team”. Now you're ready to choose which recipients you want to include in the contact group
4. Click the **CONTACT GROUP** tab on the Ribbon and click the **Add Members** button in the Members group.

There are three sources you can use to add recipients to a contact group:

- From Outlook Contacts:** Use this option to add a recipient already in your Outlook Contacts list.
  - From Address Book:** Use this option to add a recipient from the Address Book, including any recipients in the Global Address List.
  - New E-Mail Contact:** Use this option to add a recipient who has not been entered as an e-Mail contact.
5. Select an option from the list. Depending on the option you select, either the Select Members or Add New Member dialog box appears.
  6. Select or enter the recipients you wish to add.
  7. Click the **Save & Close** button in the Actions group on the Ribbon.

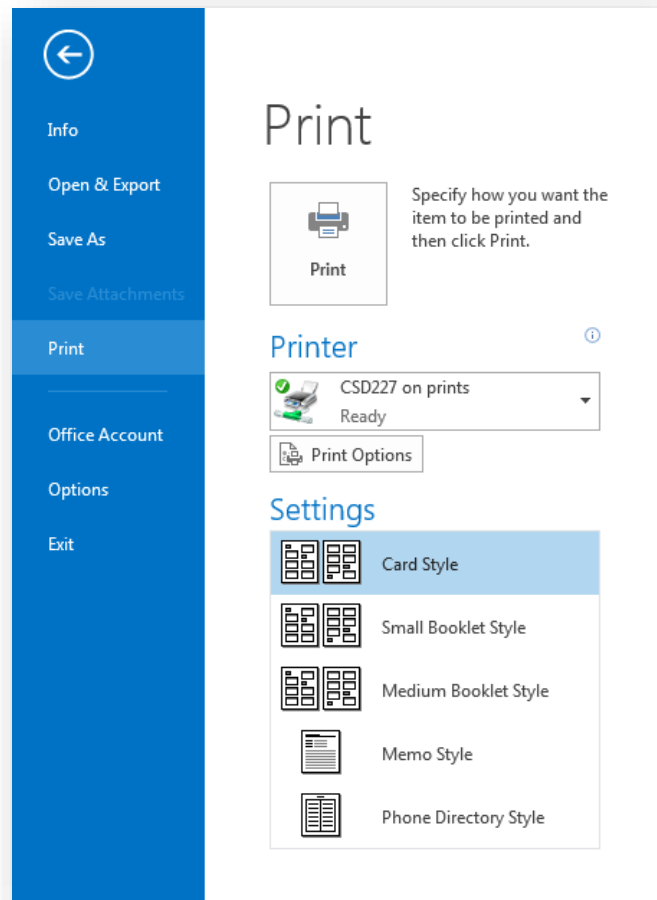


## Printing Contact Records



Depending on the view, Outlook offers a variety of print styles, such as those described in the following table.

Style	Description	Available in these views
<b>Card</b>	Contact information displayed alphabetically in two columns. Letter graphics appear at the top of each page and the beginning of each letter group.	Business Card, Card, People
<b>Small Booklet</b>	Contact information displayed alphabetically in one column. Formatted to print eight numbered pages per sheet. Letter graphics appear at the top of each page and the beginning of each letter group, and a contact index at the side of each page indicates the position of that page's entries in the alphabet.	Business Card, Card, People
<b>Medium Booklet</b>	Contact information displayed alphabetically in one column. Formatted to print four numbered pages per sheet. Letter graphics appear at the top of each page and the beginning of each letter group, and a contact index at the side of each page indicates the position of that page's entries in the alphabet.	Business Card, Card, People
<b>Memo</b>	Contact information displayed under a memo-like header that contains your name. One record per sheet.	Business Card, Card, People
<b>Phone Directory</b>	Contact names and phone numbers displayed in two columns. Letter graphics appear at the top of each page and the beginning of each letter group.	Business Card, Card, People
<b>Table</b>	Contact information displayed in a table that matches the on-screen layout.	Phone, List



## Using the Calendar

### IN THIS CHAPTER

- Scheduling an Appointment
- Scheduling a Meeting
- Working with Recurring Appointments
- Color-coding Appointments
- Responding to Meeting Request
- Updating and Cancelling a Meeting
- Viewing the Calendar
- Sharing Calendar Information
- Checking Other People's Calendar
- Printing a Calendar
- Defining Your Available Time
- Setting Out of Office Message

*You can use the Microsoft Outlook 2013 calendar to organize your daily activities and to remind you of important tasks and events. Using the calendar effectively can help you stay organized, on time, and on task. You can schedule and track appointments, meetings, and events, and block time as a reminder to yourself to take care of tasks. You can also share your calendar information with other people in several ways; for example, you can share an entire calendar or only selected information with people inside or outside of your organization.*

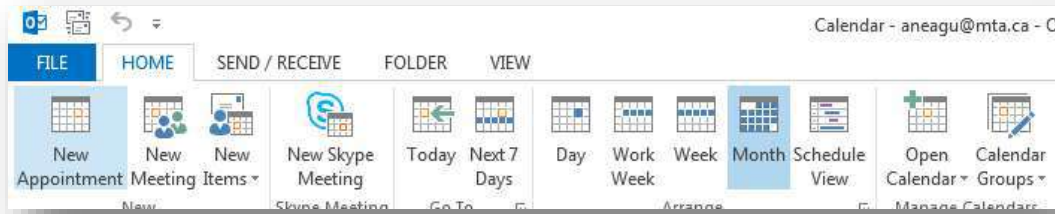
### Scheduling an Appointment

Appointments are blocks of time you schedule for only yourself (as opposed to meetings, to which you invite other Outlook users). An *appointment* is any scheduled activity that takes place within a one-day time period, and has a specific start time and end time (as opposed to an event, which occurs for one or more full 24-hour periods).

1. Click the **Calendar** button in the Navigation Bar.
2. Click the **New Appointment** button on the Ribbon.



Similar to 2013



3. Type a description of the appointment in the **Subject** field.
4. Specify the date of the appointment and its start and end time.

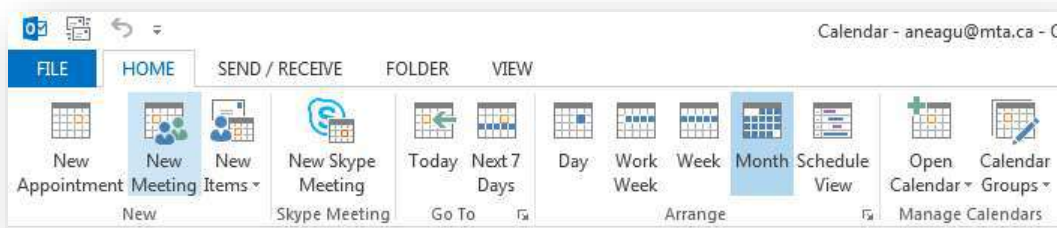
When creating an appointment, you indicate your availability (referred to as *Free/Busy time*) by marking it as Free, Working Elsewhere, Tentative, Busy, or Out Of Office. The appointment time is color-coded on your calendar to match the availability you indicate. Your availability is visible to other Outlook users on your network, and is also displayed when you share your calendar or send calendar information to other people.

5. Enter additional information about the appointment as desired.
6. Click the **Save & Close** button in the **Actions** group on the Ribbon. The Appointment window closes and the appointment appears in your calendar.

### Scheduling a Meeting

When you schedule a meeting, the Calendar blocks off the specified time span—for example, from 10 a.m. to noon.

1. Click the **Calendar** button in the Navigation Bar.
2. Click the **New Meeting** button on the Ribbon. An Untitled—Meeting window appears.



3. Fill in the necessary information for the meeting you want to set up.

**To...** - Attendee to be invited to the meeting.

**Subject** - Subject title for the appointment.

**Location** - Type the location of where the meeting will occur.



**Start time** - Select the date and start time of the appointment.

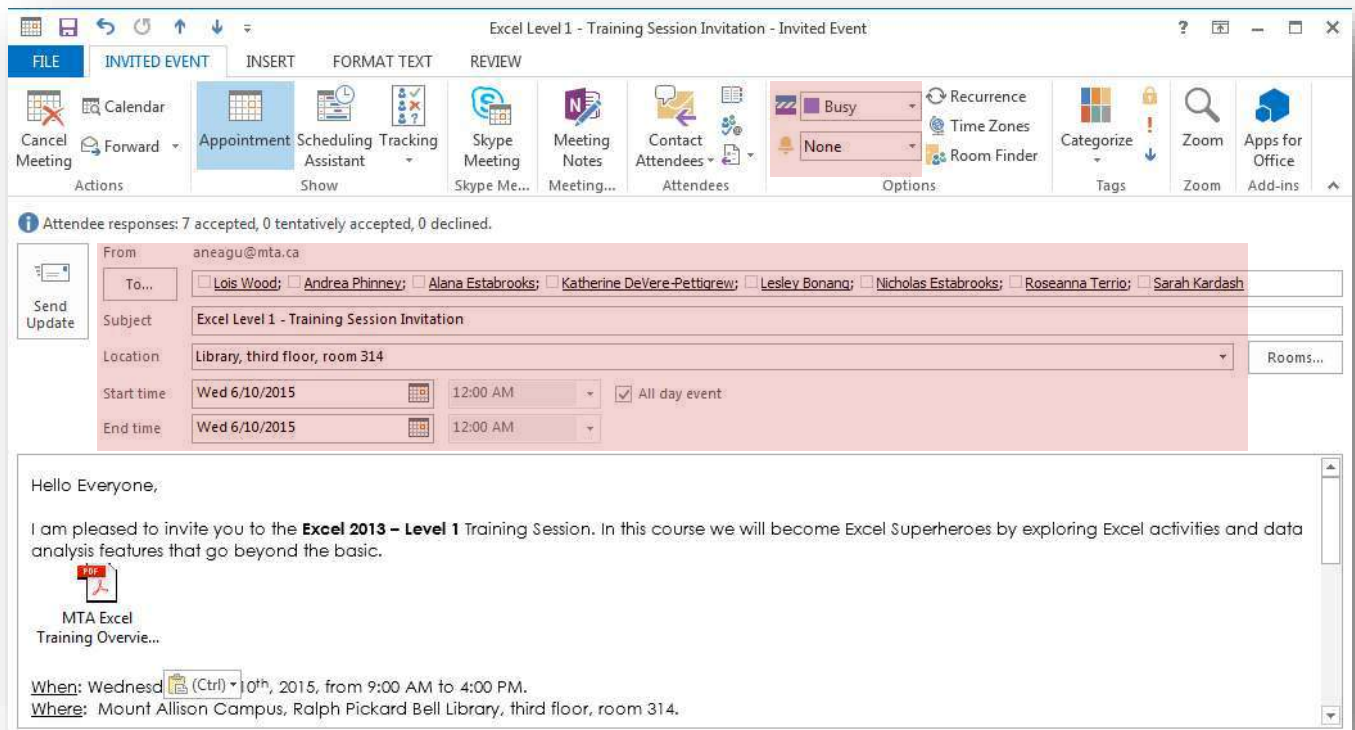
**End time** - Select the date and end time of the appointment.

**Description box** - Type in any description or details of the appointment for your own reference.

**Show As** – Change how the time for this event is marked on your calendar.

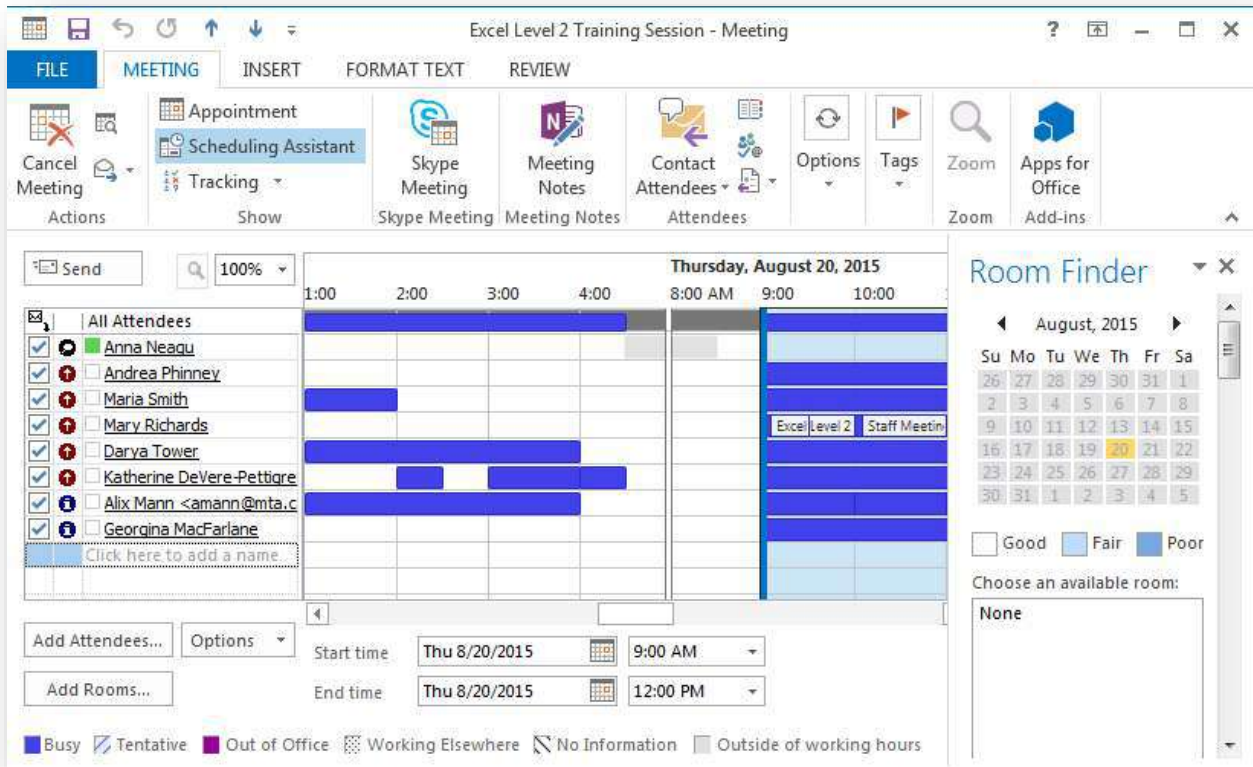
**Reminder** - Select the desired reminder time to the right of the bell icon in the top middle of the Appointment window.

*tip!* You can also attach files such as Word documents, PDFs, spreadsheets and more to the meeting. These can be saved and/or opened by the other Attendees. Either drag a file from your computer into the body of the Appointment, or select **Insert** tab, then the **Attach File** icon from the top row of the Appointment window.



4. Select the **Scheduling Assistant** icon near the top of the **Meeting** tab and review the chart that appears to the right of each individual's name.

**Blue:** The time is marked as busy.  
**Blue and White Striped:** This time is scheduled with tentative appointments.  
**Purple:** This time is marked as out of office.  
**Black and White Striped:** Outlook has no information for this time.



- To change the desired meeting time simply slide the sides of the blue vertical bracket indicating your meeting's start and end times to a different place in the chart. Use the scroll bar at the very bottom of the chart to view more times and dates if needed.
- To classify attendees, click the icon next to the attendee's name until you see the icon for the desired classification. Attendee classifications are taken into account by the Suggested Times.

**Organizer:** This is the creator of the meeting; it will by default appear to the left of your name (and will not be an option for other attendees). This position is regarded as necessary by the Suggested Times list

**Required Attendee:** Invitees to be regarded as necessary by the Suggested Times list. Invitees are by default listed as required.

**Optional Attendee:** Invitees for whom attendance is optional; separated from Required Attendees in the Suggested Times list.

**Resource:** This label marks rooms or equipment added to the meeting, and is regarded as necessary by the Suggested Times list

5. Click **Appointment** in the Meeting tab at the top of the screen. This will return you to the Appointment screen. You will see the details for the date and time you selected.
6. Click **Send** once you have completed the necessary details and you have now successfully sent out a meeting invitation and created a meeting. There should now be an entry for the meeting in your calendar.

## Working with Recurring Appointments

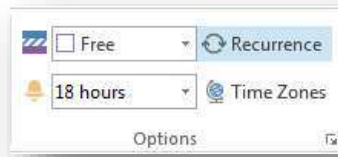


Similar to 2013

A *recurring* appointment is an appointment that occurs at regular intervals; for example, every Friday at 10 a.m.

### Create a recurring appointment

1. Click the **New Items** button in the New group on the Ribbon and select **New Appointment** from the drop-down.
2. Type a description of the appointment in the **Subject** field.
3. Click the **Recurrence** button in the Options group.



4. The Appointment Recurrence dialog box appears. Here you need to specify the time of the appointment, how often the appointment should recur (for example, every Friday), and the start and end date of the recurrence.

5. Make your specifications in the Appointment Recurrence dialog box and click **OK**.
6. Click the **Save & Close** button in the **Actions** group.



## Edit a recurring appointment

1. Double-click the appointment you want to edit. The Open Recurring Item dialog box appears. You have two options here:
  - Open this occurrence:** Edits only the selected occurrence of the recurring appointment.
  - Open the series:** Edits every occurrence of the recurring appointment.
2. Select the appropriate option and click **OK**. The appointment opens in its own window.
3. Edit the appointment as necessary.
4. Click the **Save & Close** button in the Actions group. Outlook saves your changes.

## Delete a recurring appointment

1. In the Calendar, click the appointment that you want to delete.
2. Press the **<Delete>** key. The Confirm Delete dialog box appears. You have two options here:
  - Delete this occurrence:** Deletes only the selected occurrence of the recurring appointment.
  - Delete the series:** Deletes every occurrence of the recurring appointment.
3. Select the appropriate option and click **OK**.

## Color-coding Appointments

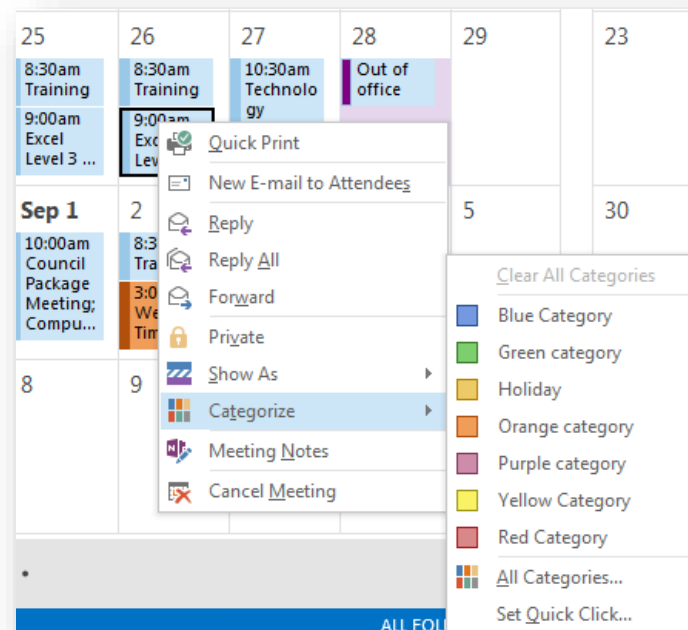


Similar to 2013

Color categories let you organize your Outlook items by color, making it easier to distinguish between different types of information. In the Calendar, you can color-code your appointments, meetings, and events.

By default, six color categories are available. You can apply one or more categories to an item at a time.

1. Select the appointment, meeting, or event you want to color-code.
2. Right-click the item you want to color-code, point to **Categorize** in the contextual menu.
3. Select a color category from the list.
4. The selected color is applied to the appointment.



## Responding to Meeting Request



Similar to 2013

1. Open the meeting request or notification in your **Inbox** (rather than in your Calendar).
2. You can respond to a meeting request in one of these four ways:

**Accept the request.** Outlook deletes the meeting request and adds the meeting to your calendar.

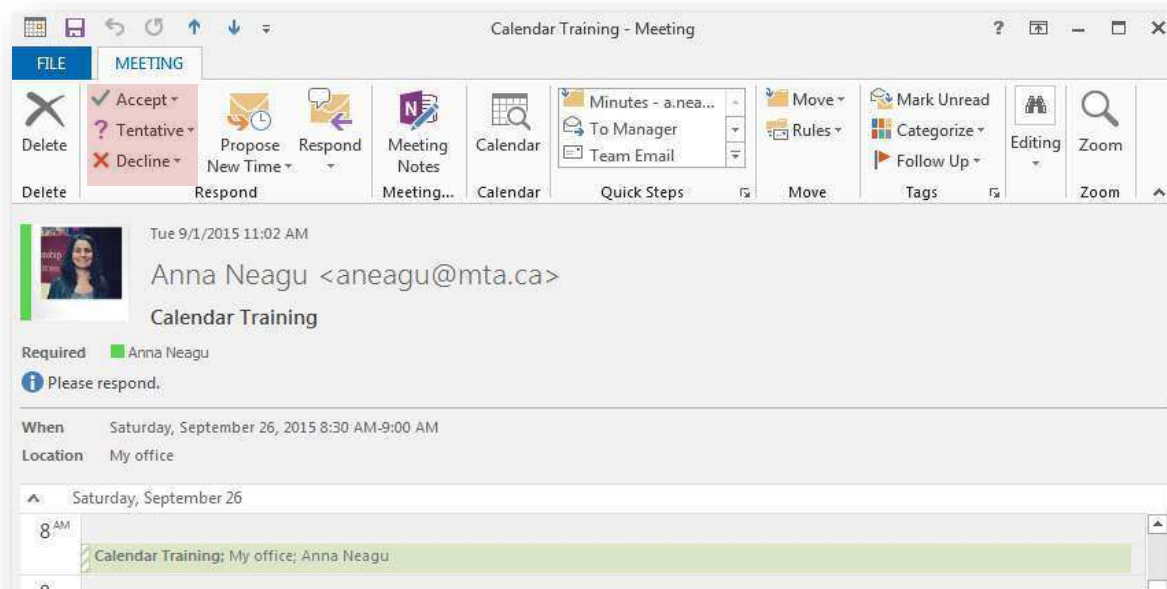
**Tentatively accept the request,** which indicates that you might be able to attend the meeting but are undecided. Outlook deletes the meeting request and shows the meeting on your calendar as tentatively scheduled.

**Propose a new meeting time.** Outlook sends your request to the meeting organizer for confirmation and shows the meeting with the original time on your calendar as tentatively scheduled.

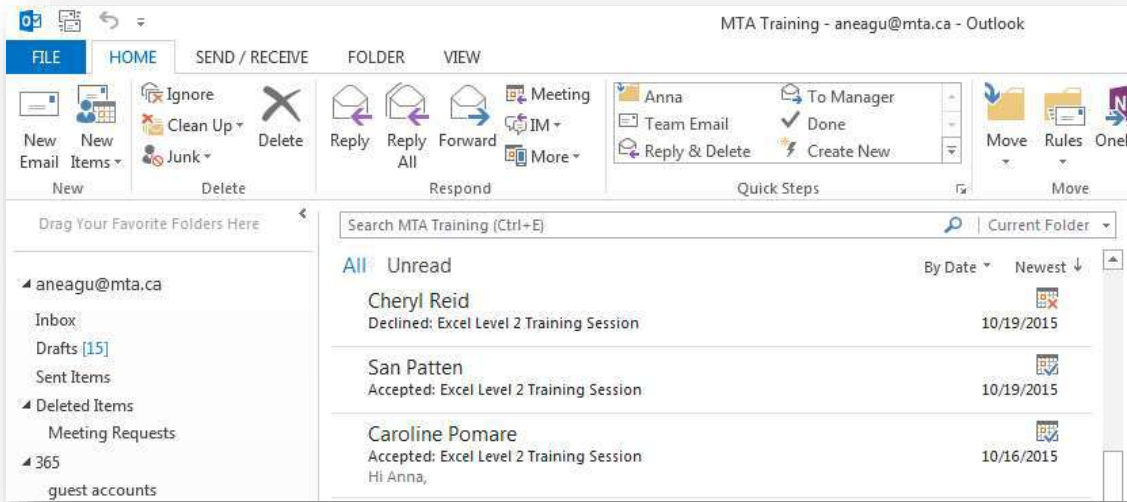
**Decline the request.** Outlook deletes the meeting request and removes the meeting from your calendar.

3. In the drop-down menu that appears, select one of the following:

- **Edit the Response before Sending:** This allows you to include a message with your response.
- **Send the Response Now:** Sends a response immediately.
- **Do Not Send a Response:** If you choose this option the meeting organizer won't be notified whether or not you'll be attending. Avoid using this option.



When attendees accept and send their replies to your meeting request, the replies appear in your **Inbox**.



## Tracking Attendees

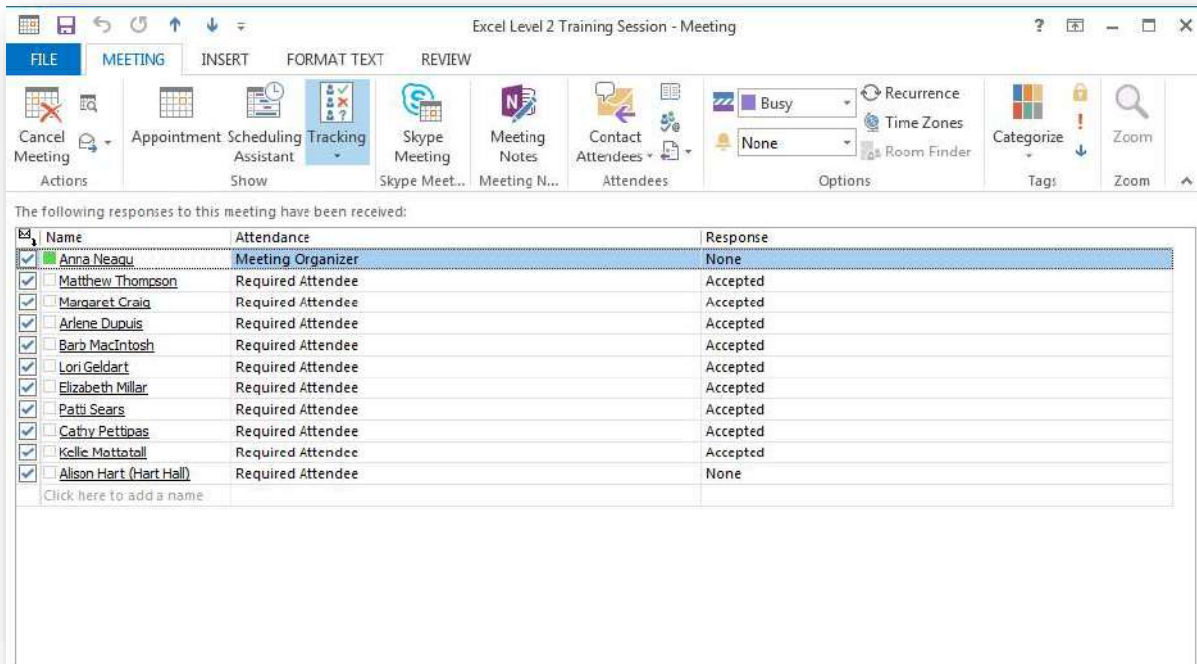


Meeting Tab / Scheduling

You can easily check which attendees have accepted, declined, or have not responded to an invitation.

1. Click on the **Tracking** button on the **Meeting** toolbar.
2. Under the **Response** column check the attendees' responses. You can also manually change the attendees' responses by clicking on the drop down and selecting from the list.

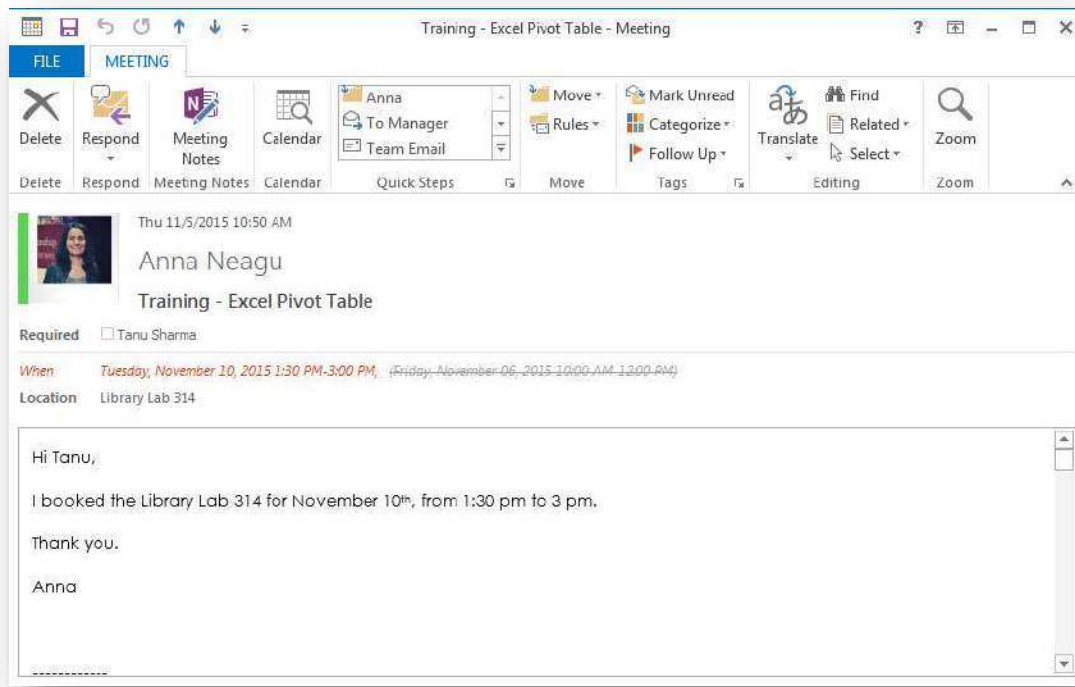
Remember that the **Tracking** button only appears after the meeting invitation is sent out.



## Updating and Canceling Meetings

You might find it necessary to change the date, time, or location of a meeting after you send the meeting request. As the meeting organizer, you can change any information in a meeting request at any time, including adding or removing attendees, or canceling the meeting.

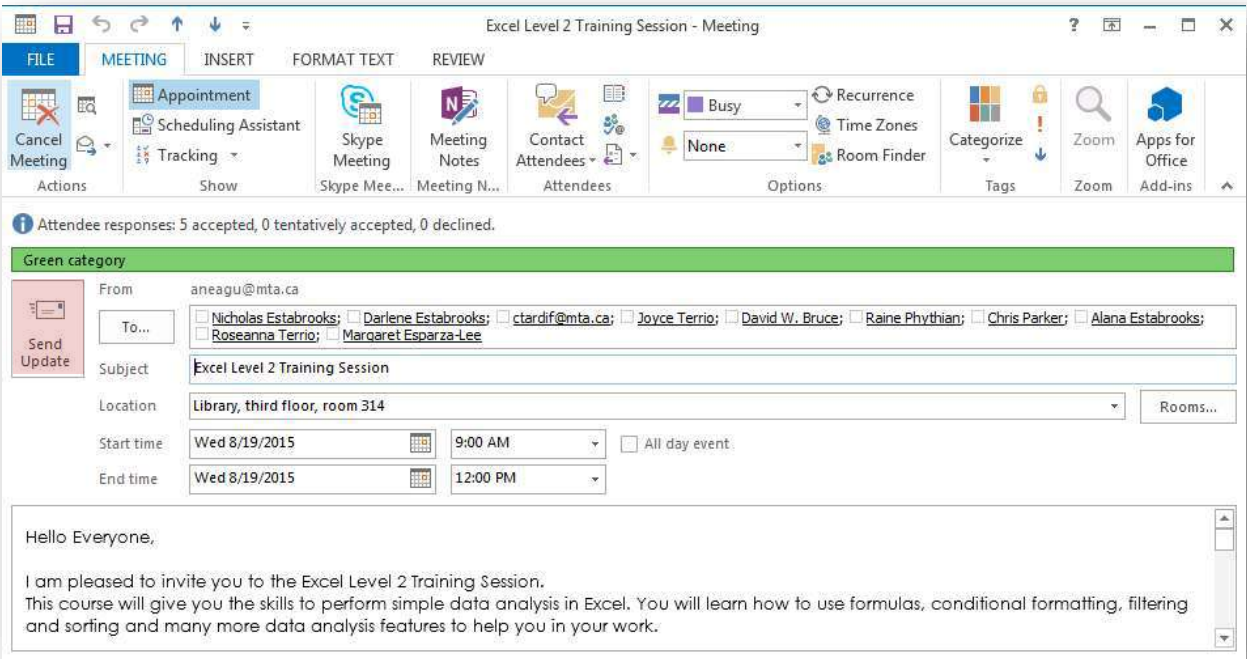
To edit a meeting request, double-click the meeting on your calendar. If the meeting is one of a series (a recurring meeting), Outlook prompts you to indicate whether you want to edit the meeting series or only the selected instance of the meeting. Make the changes you want, and then send the meeting update to the attendees. Each attendee will receive a meeting update message.



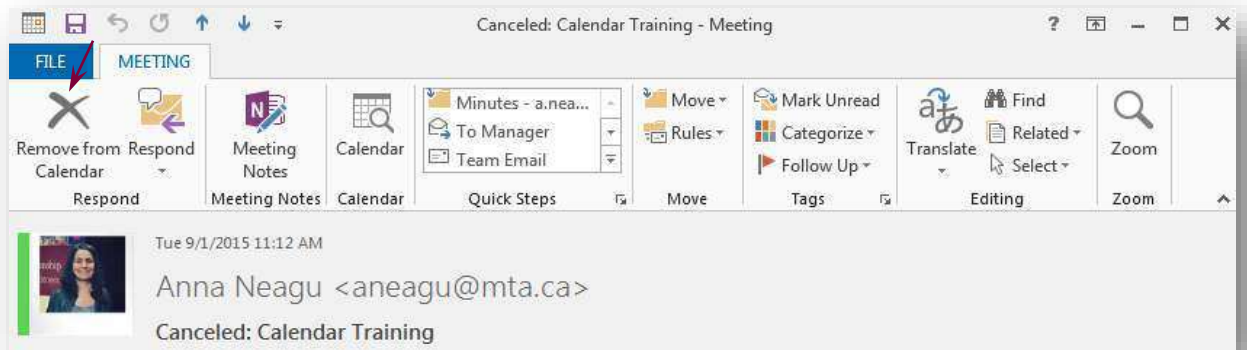
*Changes to meeting details are tracked so that attendees can quickly identify them.*

To cancel a meeting, click the meeting on your calendar, or open the meeting window.

1. Click on the **Cancel Meeting** button on the Meeting tab.
2. Click on the **Send Cancellation** button.



- Attendees will receive a notice that the meeting has been cancelled. The notice contains a link to automatically remove the cancelled meeting from their calendar.



After you edit or cancel a meeting, Outlook sends an updated meeting request to the invited attendees to keep them informed. If the only change you make is to the attendee list, Outlook gives you the option of sending an update only to the affected attendees.

### Viewing the Calendar

The Calendar module offers four distinct views of content, which are available from the Change View list in the Current View group on the View tab. These views are:

**Calendar.** This is the standard view in which you display your Outlook calendar. In the Day, Work Week, or Week arrangement, Calendar view displays the subject, location, and organizer (if space allows) of each appointment, meeting, or event, in addition to the availability bar and any special icons, such as Private or Recurrence.

**Preview.** In the Day, Work Week, or Week arrangement, Preview view displays more information, including information from the notes area of the appointment window, as space allows.

**List.** This list view displays all appointments, meetings, and events on your calendar.

**Active.** This list view displays only future appointments, meetings, and events.

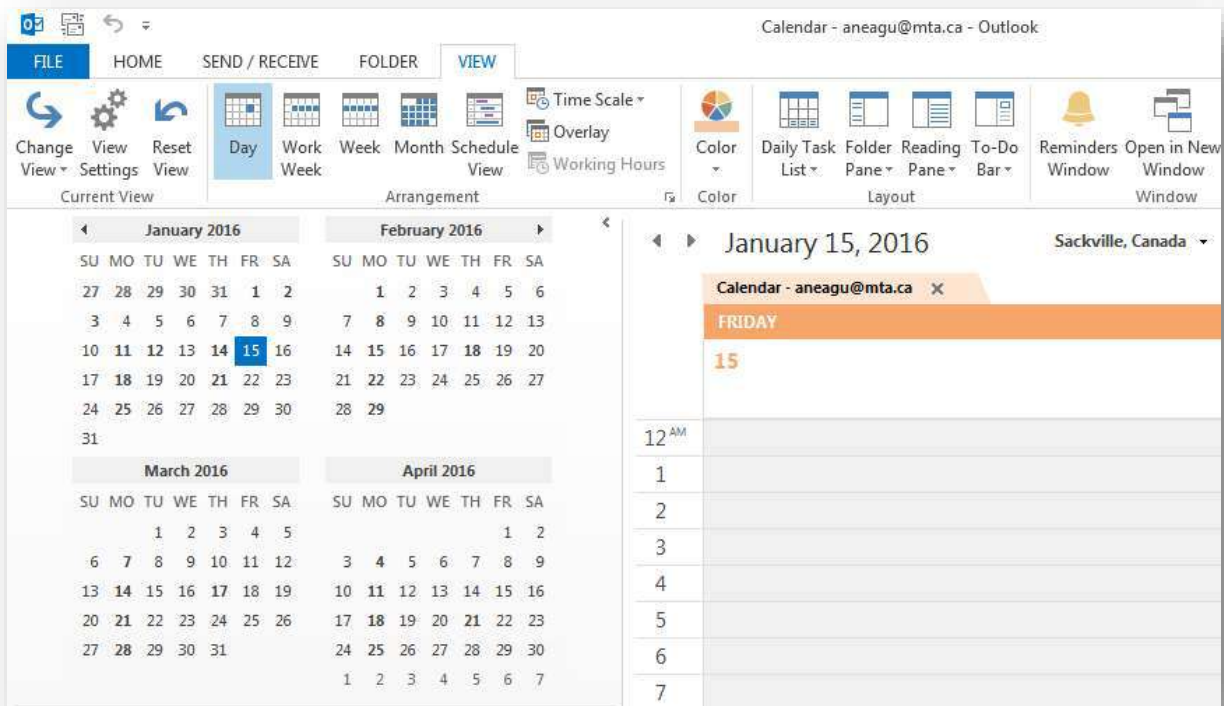
You can use these additional tools to change the time period shown in the calendar:

- Display the previous or next time period by clicking the **Back** button or the **Forward** button next to the date or date range in the calendar header.
- Display the current day by clicking the **Today** button in the Go To group on the Home tab.
- Display a seven-day period starting with the current day by clicking the **Next 7 Days** button in the Go To group on the Home tab.
- Display week numbers to the left of each week in **Month** view and in the Date Navigator. If you implement this option, you can click the week tab to display that week.

You can use the Date Navigator to change the day or range of days shown on the calendar.



By default, the Outlook 2013 Calendar module displays the current month and next month in the Date Navigator at the top of the Folder Pane. You can display more or fewer months by changing the width or height of the area allocated to the Date Navigator.



You can allocate up to 50 percent of the program window to the Folder Pane.

## Sharing Calendar Information

Co-workers can view your available working time when they schedule meetings with you or view your calendar through Outlook. If you want to share more information with co-workers or with people outside of your organization, you have several options for doing so.

If your email address is part of an Exchange network, you can give permission to other people on your network to view, modify, or create items within a calendar or any other type of Outlook folder. The level of access each co-worker has is governed by the permissions you assign to him or her.

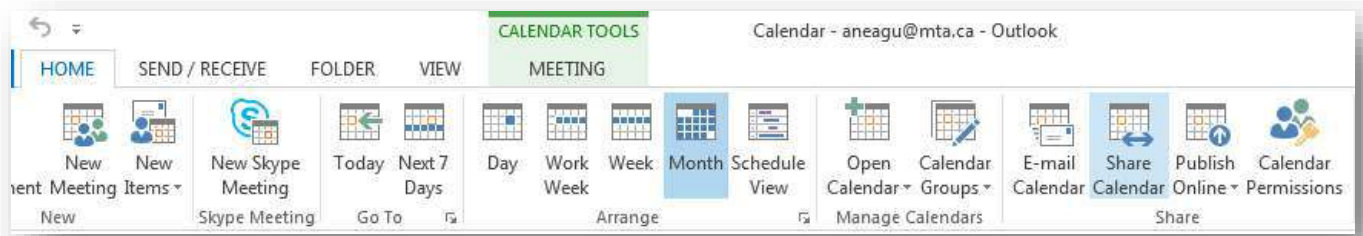
To share a calendar with a co-worker:

1. In the **Calendar** module, display the calendar you want to share.

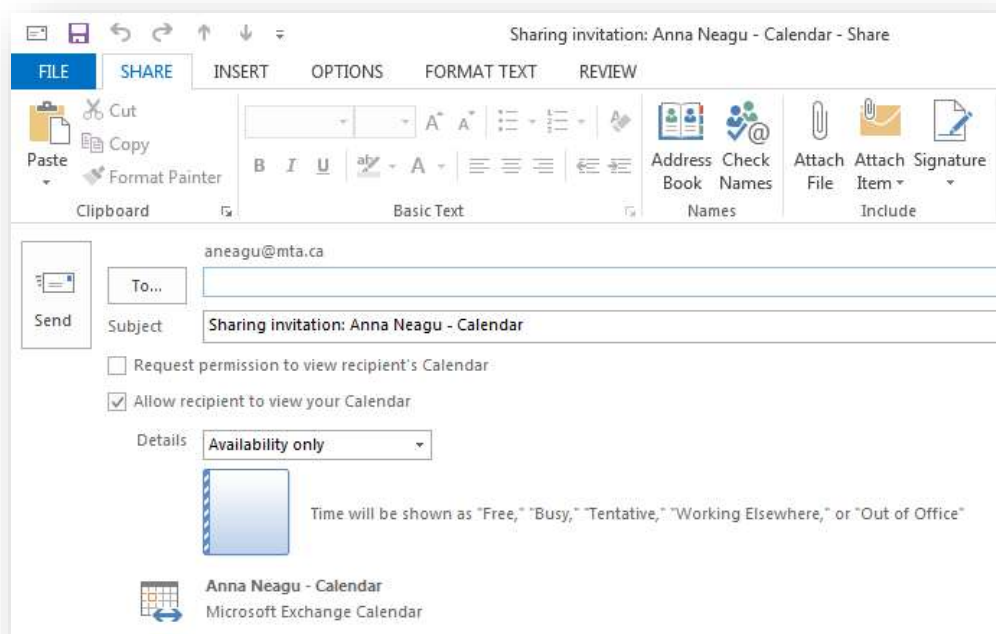


Organize Tab / Permissions

2. On the **Home** tab, in the **Share** group, click the **Share Calendar** button to create a message, called a *sharing invitation*.



3. Address the message to the person with whom you'd like to share your calendar. If you'd like to request that the person reciprocate by sharing his or her calendar with you, select the **Request permission to view recipient's Calendar** check box.



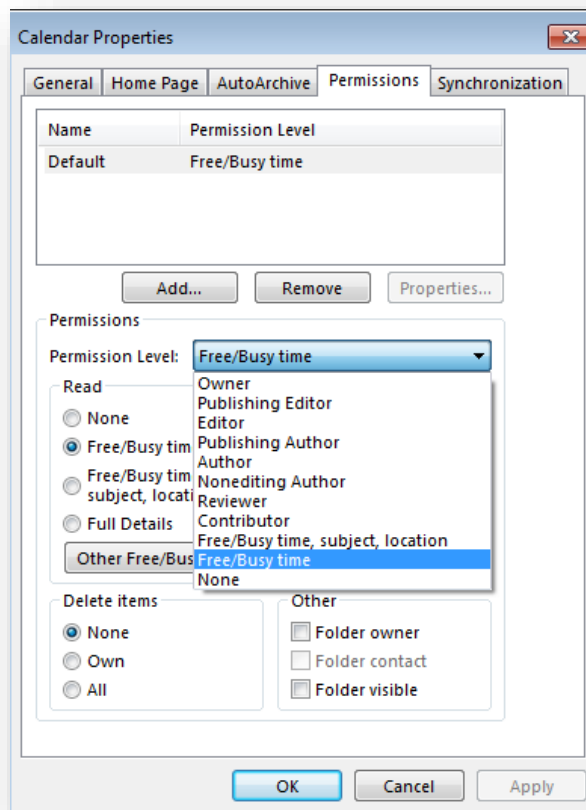
4. In the **Details** list, click the level of detail you want to share: **Availability only**, **Limited details**, or **Full details**.
5. Add any notes you want to in the content pane, send the message, and then click **Yes** in the **Microsoft Outlook** dialog box that asks you to confirm that you want to share the calendar with the specified permissions.



After you share a calendar, you can specify the actions each person with whom you share the calendar can take. On the Permissions page of the Calendar Properties dialog box, which you display by clicking the **Calendar Permissions** button in the Share group on the **Home** tab, you can select a permission level, which includes specific Read, Write, Delete, and other settings, or you can select individual settings in each category.



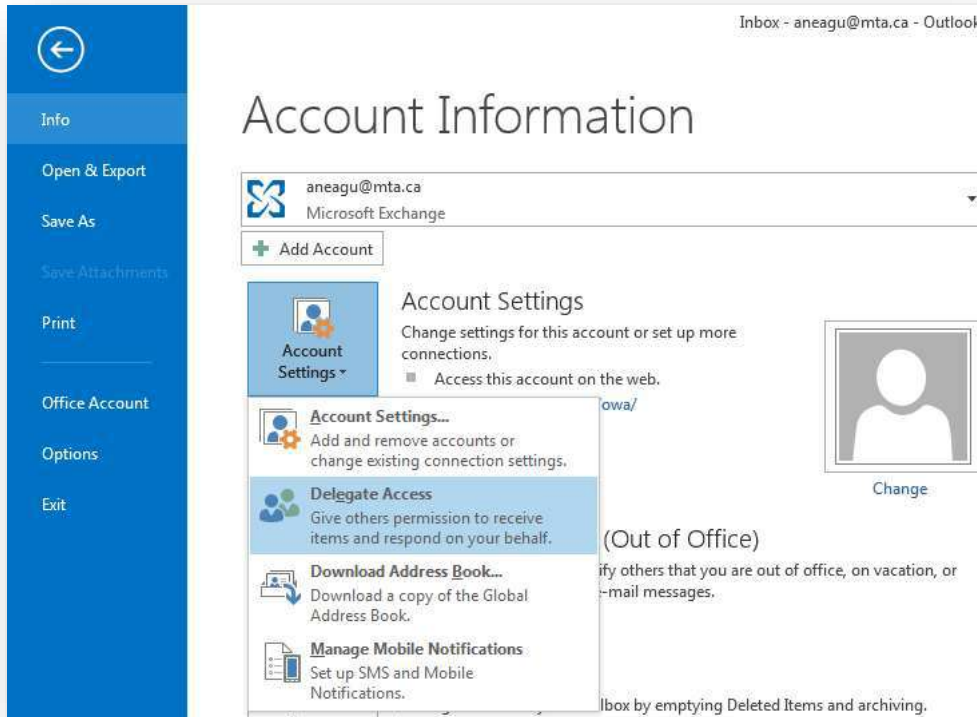
From the Permissions page, you can change the default permission level to your calendar and permit co-workers to view more information than only your availability.



You can delegate control of your calendar so that a co-worker or assistant can create and respond to meeting requests on your behalf, and specify that meeting requests should be delivered to your delegate rather than to you. You receive copies of the meeting requests and copies of your delegate's responses, but you don't have to respond.

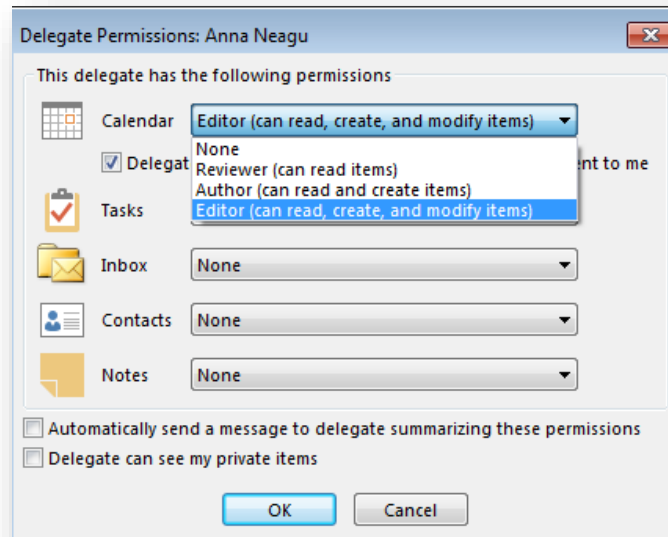
To delegate control of your calendar to another Outlook user, follow these steps:

1. On the **Info** page of the **Backstage** view, click **Account Settings**, and then click **Delegate Access**.
2. In the **Delegates** dialog box, click **Add** to open the **Add Users** dialog box.



3. In the **Add Users** dialog box, click the person you want to delegate control to, click **Add**, and then click **OK** to open the **Delegate Permissions** dialog box. Notice that you can delegate individual permission levels for each module.
4. In the **Delegate Permissions** dialog box, set the permission level you want the delegate to have for each module.
5. Select the **Automatically send a message...** check box to ensure that your delegate is aware of the permissions you're delegating to him or her.
6. If you want to allow your delegate to view details of items that you mark as private, select the **Delegate can see my private items** check box.





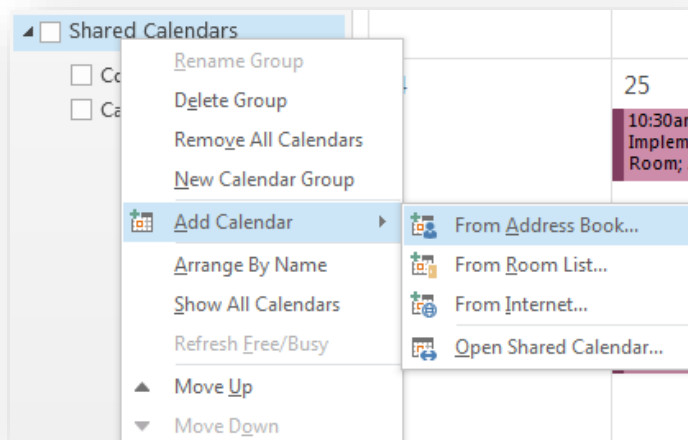
7. In the **Delegate Permissions** dialog box, click **OK**. The delegate appears in the **Delegates** dialog box. You can modify the delegation permissions for an existing delegate, or rescind the delegation, at any time.

### Checking Other People's Calendar



Organize Tab / Open Calendar

1. Select **Calendar** in the Navigation pane.
2. Right click on **Shared Calendars** and select **Add Calendar From Address Book**.



3. Enter the name of the colleague whose calendar you want to view for **Name** or click **Name** to select a name from the Address Book, select a name and click **OK**.
4. Click **OK**. The shared Calendar appears adjacent to any calendar that is already in the view.

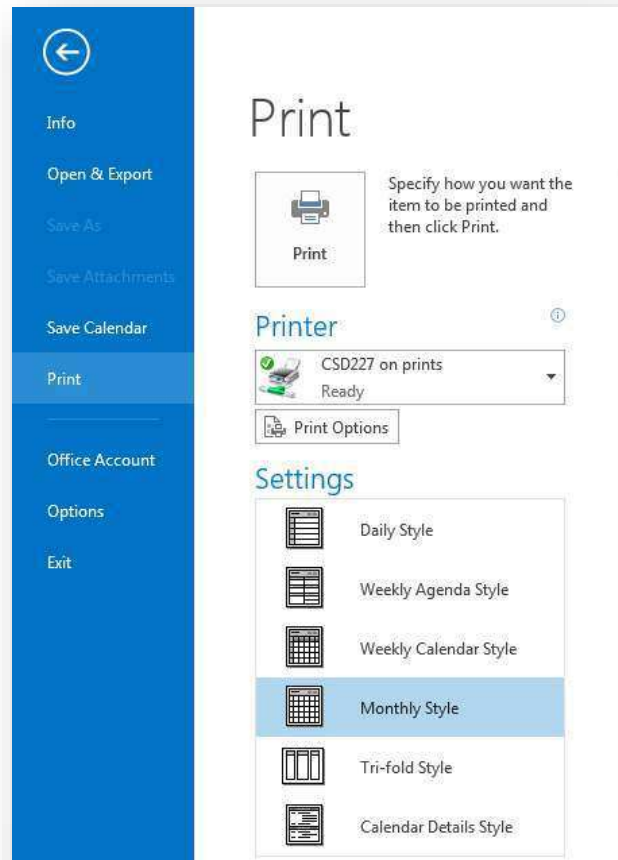
## Printing a Calendar



File Menu / Print

Printing the Calendar is no different than printing anything else in Outlook, except for a few unique Calendar-related options that you need to be aware of. You can customize the Calendar print settings so your printed calendar looks the way you want it to.

The available print styles vary based on what view you're in when you choose the Print command.



The default print styles include the following:

**Daily Style** Prints the selected date range with one day per page. Printed elements include the date, day, TaskPad, reference calendars for the current and upcoming months, a breakdown of working hours in 30-minute blocks, and an area for notes.

**Weekly Agenda Style** Prints the selected date range with one calendar week per page, including reference calendars for the selected and following month.

**Weekly Calendar Style** Prints the selected date range with one calendar week per page. Each page includes date range and time increments for working hours, and reference calendars for the selected and following month.

**Monthly Style** Prints a page for each month in the selected date range. Each page includes the selected month with a few days showing from the previous and subsequent months, along with reference calendars for the selected and following month.

**Tri-fold Style** Prints a page for each day in the selected date range. Each page includes the daily schedule, weekly schedule, and Task Pad.

**Calendar Details Style** Lists your appointments for the selected date range, in addition to the accompanying appointment details.

You can select the date or range of dates to be printed and modify the page setup options to fit your needs.

## Defining Your Available Time

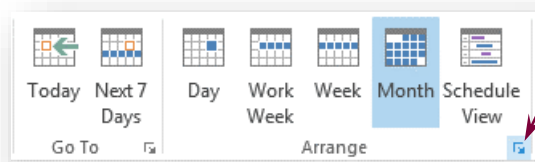


Outlook Menu / Preferences / Calendar

In your Outlook calendar, the time that you indicate you are available for other people to schedule meetings with you is referred to as your *work week*.

By default, the Outlook work week is defined as from 8:00 A.M. to 5:00 P.M. (in your local time zone), Monday through Friday. You can change this to match your individual work schedule. In Outlook 2013, you can specify a start time and end time for your standard work day, specify the days of the week that you work, and specify the day of the week that you'd like to appear first when you display only the work week in your calendar.

1. On the **Home** tab, click the **Arrange** dialog box launcher to display the **Calendar** page of the **Outlook Options** dialog box.



The work week settings are located in the **Work time** section at the top of the page.

2. Define the days and times that you are available to meet with co-workers.

**Work time**

Work hours:

Start time: 8:30 AM

End time: 4:30 PM

Work week:  Sun  Mon  Tue  Wed  Thu  Fri  Sat

First day of week: Sunday

First week of year: Starts on Jan 1

## Adding national and religious holidays to your calendar

You can easily add the holidays of a specific country or religion to your Outlook calendar. To do so, follow these steps:

1. Display the **Calendar** page of the **Outlook Options** dialog box.
2. In the **Calendar Options** section, click the **Add Holidays** button to open the **Add Holidays to Calendar** dialog box.

*The holidays of more than 110 countries are available to add to your calendar.*

3. Select the check boxes of the locations or religions whose holidays you want to add to your calendar, and then click **OK**.

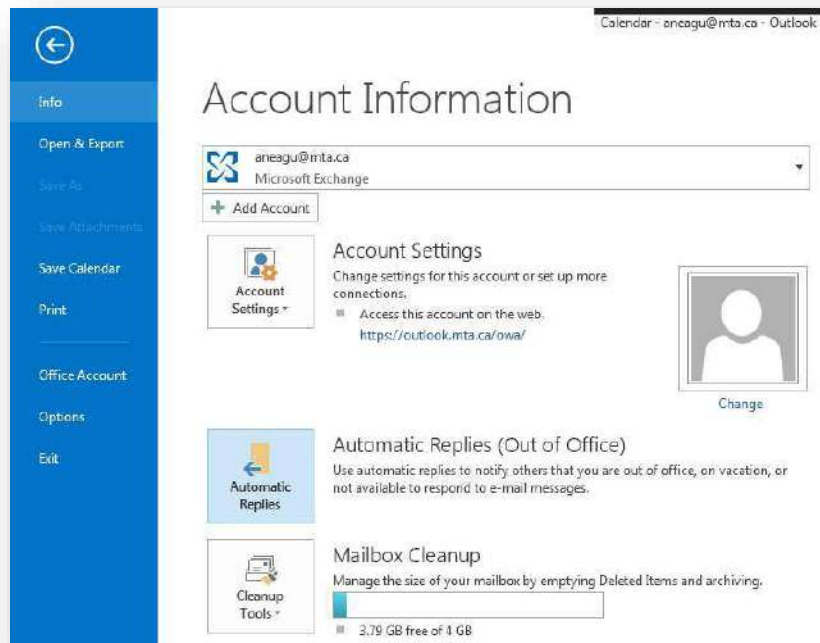
After Outlook adds the selected country's holidays to your calendar, click **OK** in the confirmation message box and in the **Outlook Options** dialog box.

## Setting Out of Office Message

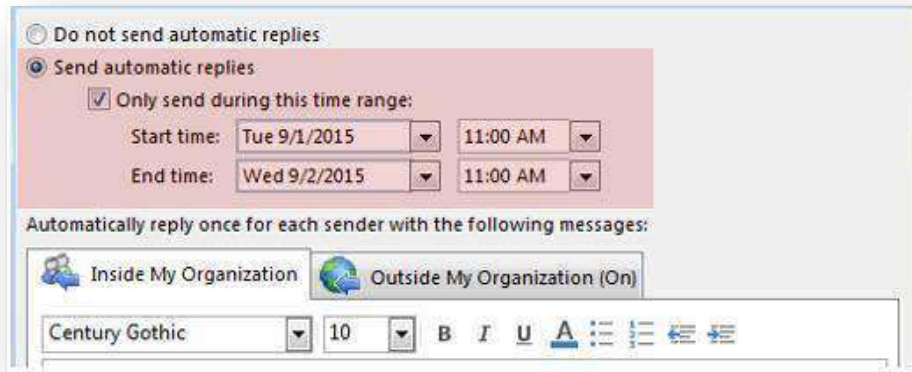


Tools Menu / Out of Office

1. Open **Outlook**.
2. Click the **File** tab.
3. Click the **Automatic Replies (Out of Office)** button.



4. Click the **Send automatic auto-replies** button.
5. Check the **Only send during this time range** box.
6. Next enter a **Start and End time** in the box as seen below.



7. In the **Inside My Organization** tab insert the message you wish to be sent out.
8. In the **Outside My Organization** tab insert the message you wish to be sent out to people outside of your organization.
9. Click OK.

## Working with Tasks

### IN THIS CHAPTER

- Creating Tasks
- Updating Tasks
- Changing Task Views
- Assigning a Task
- Completing a Task
- Printing Tasks

*If you use Microsoft Outlook 2013 on a daily basis, you might find it far easier to use the built-in task-tracking functionality. You can add tasks, flag messages for follow-up, assign due dates, receive reminders, and mark tasks as complete when you finish them. You can even assign tasks to other people, and if those people use Outlook, you can view their progress on assigned tasks as they track progress milestones.*

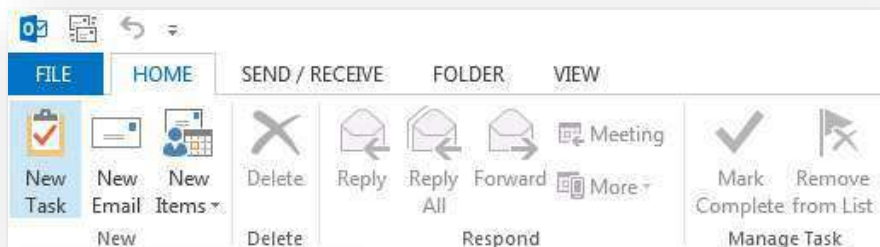
### Creating Tasks

Recording your tasks makes them easier to remember and manage. Outlook tasks provide a great way to organize what you need to get done.

In Outlook, you can create a **task** item that you can track until completion, or you can create a **to-do item**. A **to-do item** is an e-Mail message or contact that has been flagged for follow-up. All these items appear in the To-Do List. In this lesson, we'll look at how to add a task or create a to-do item from a message or contact.

### Creating a Task

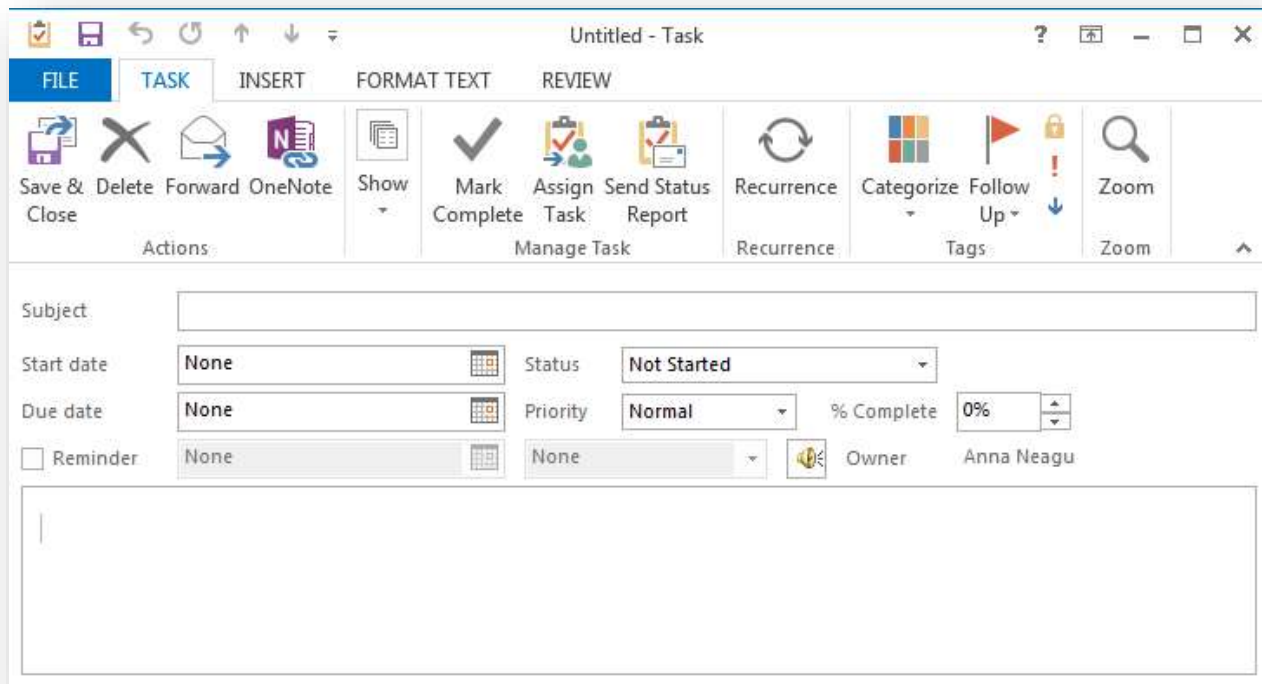
1. Click the **Tasks** button in the Navigation Bar. The To-Do List appears in Tasks.
2. Click the **HOME** tab on the Ribbon and click the **New Task** button in the New group. A Task item window appears.



Similar to 2013



3. Enter a subject and other information about the task. The table to the right provides an overview of the fields available in the task item window.
4. Enter task details in the text area
5. Click the **TASK** tab on the Ribbon and click the **Save & Close** button in the Actions group.



When you create a task item, the only information you really need is the subject. As with many other types of Outlook items, you can set several options for tasks to make it easier to organize and identify tasks.

<b>Start Date</b>	Specifies the date when the task will appear in the Tasks list as a reminder.
<b>Due Date</b>	Specifies the when the task must be completed.
<b>Status</b>	Specifies the status of the task: Not Started, In Progress, Completed, Waiting on Someone else, or Deferred.
<b>Priority</b>	Specifies the importance level of the task: Low, Normal, or High.
<b>% Complete</b>	Specifies the percentage of the task that is finished.
<b>Reminder</b>	Displays a reminder for the item. The reminder appears until you dismiss it or mark the task as complete.
<b>Owner</b>	Specifies the name of the person who created the task. If the task is sent to another person, that person becomes the owner of the task.

## Creating a To-do Item

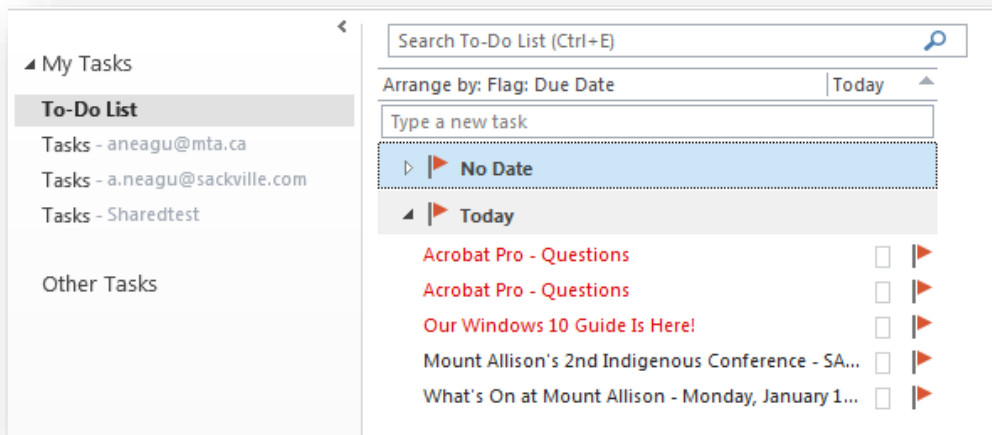
A to-do item is any Outlook item, such as a task, e-Mail, or contact that has been flagged for follow-up. Tasks are automatically flagged as to-do items when you create them, while you must flag e-Mails and contacts yourself.

- Right-click an e-Mail message or contact, point to **Follow-up**, and select a follow-up flag.

The item is marked for follow-up, as shown in the example to the right, and will appear in Tasks, as shown in the example below.



*Flagging an e-Mail message or contact creates a to-do item, but doesn't create a new task. Because the to-do item is still an e-Mail message or contact after being flagged, you can't assign it as a task to someone else or track its progress or percentage of completeness. You can move the message between mail folders, but deleting the message also deletes it from the to-do item list.*

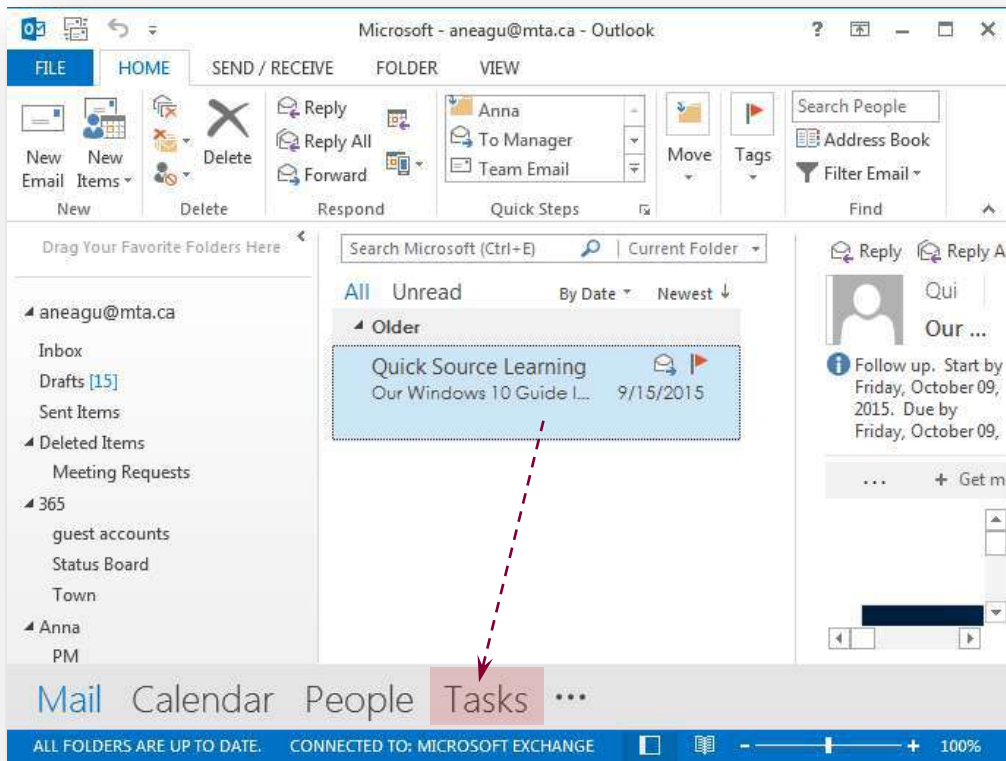


## Creating Tasks from Outlook Items

You frequently need to take action based on information you receive in Outlook—for example, information in a message or in a meeting request. You might want to add information from another Outlook item to your task list, to ensure that you complete any necessary follow-up work.

- Drag the item to the **Tasks** link or button on the **Navigation Bar**, and when a plus sign appears next to the cursor, release the mouse button.

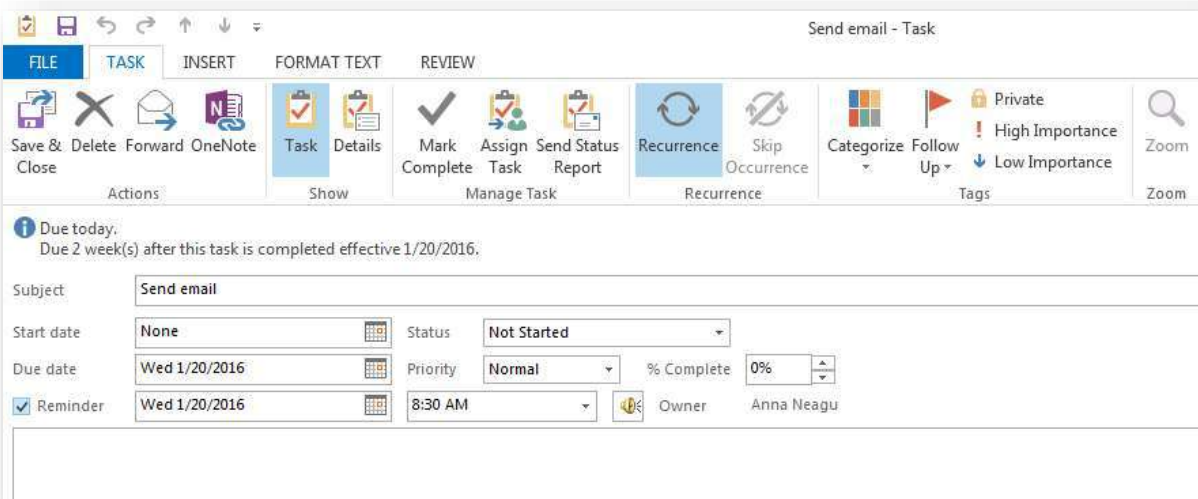
This method opens a task window that already has information filled in from the original item. You can change settings, add information and attachments, assign the task to other people, and make other changes.



### Creating a Recurring Task

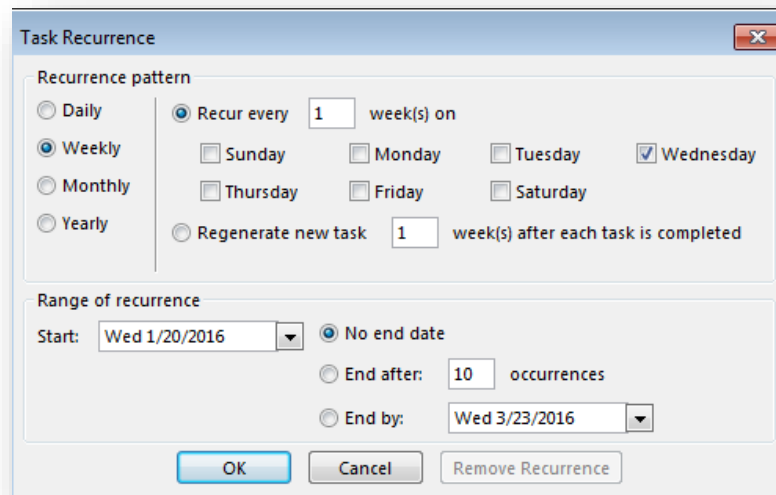
If you have a task that you do on a regular basis you can create a recurring task that automatically repeats.

1. Click the **TASKS** button in the Navigation Bar.
2. Click the **HOME** tab on the Ribbon and click the **New Task** button in the New group. A Task item window appears.
3. Enter the task information.



4. Click the TASK tab on the Ribbon and click the **Recurrence** button in the Recurrence group. The Task Recurrence dialog box appears. In the “Recurrence pattern” area, you tell Outlook when and how often the task recurs. You have several choices here:

- Daily:** Tasks that recur every day or every work day.
- Weekly:** Tasks that recur on the same day(s) of the week, such as a report due every Friday or a payroll due every other Thursday.
- Monthly:** Tasks that recur on every month, such as an inventory audit that occurs on the 5th of every month.
- Yearly:** Tasks that recur annually, such as tax.



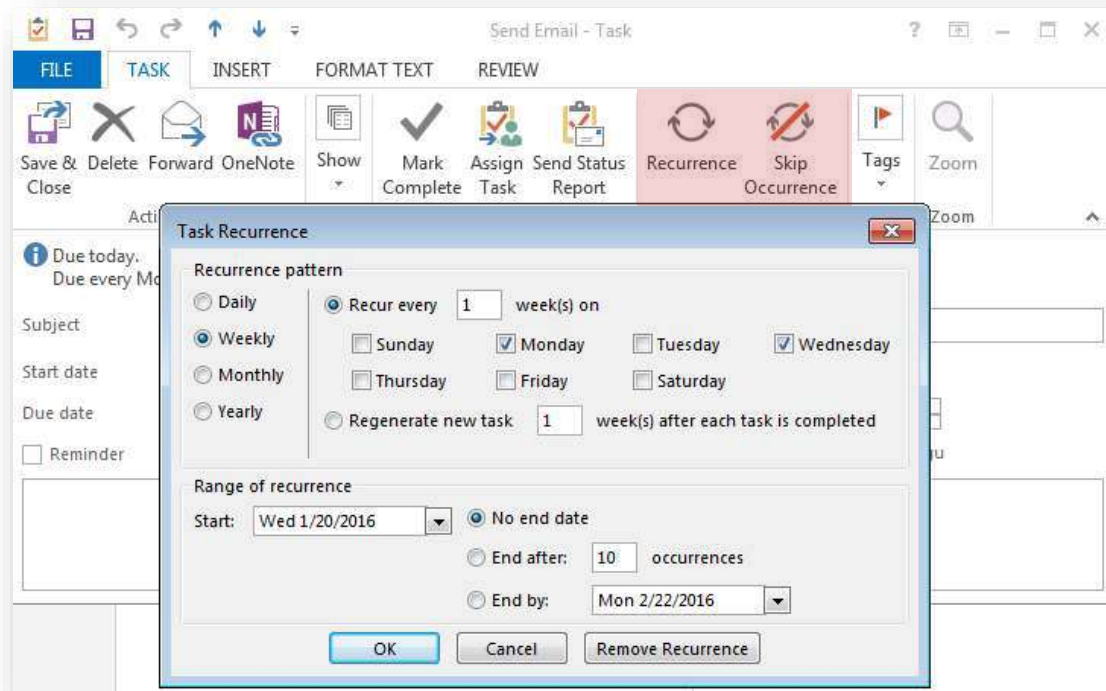
5. Select a recurrence pattern. The options to the right will change based on whether you selected Daily, Weekly, Monthly, or Yearly.
6. Select additional recurrence options from the options that appear, then set the start and end date in the “**Range of recurrence**” area.
7. Click **OK**.



To stop the task from recurring, open the task, click the **Recurrence** button in the Recurrence group on the Ribbon, and select **Remove Recurrence**.



To skip just the current occurrence of a recurring task, open the task and click the **Skip Recurrence** button in the Recurrence group on the Ribbon.



## Updating Tasks

Tasks generally appear on the Outlook task lists by start date or due date. You can change the details or dates of a task, or track the progress you've made on it.

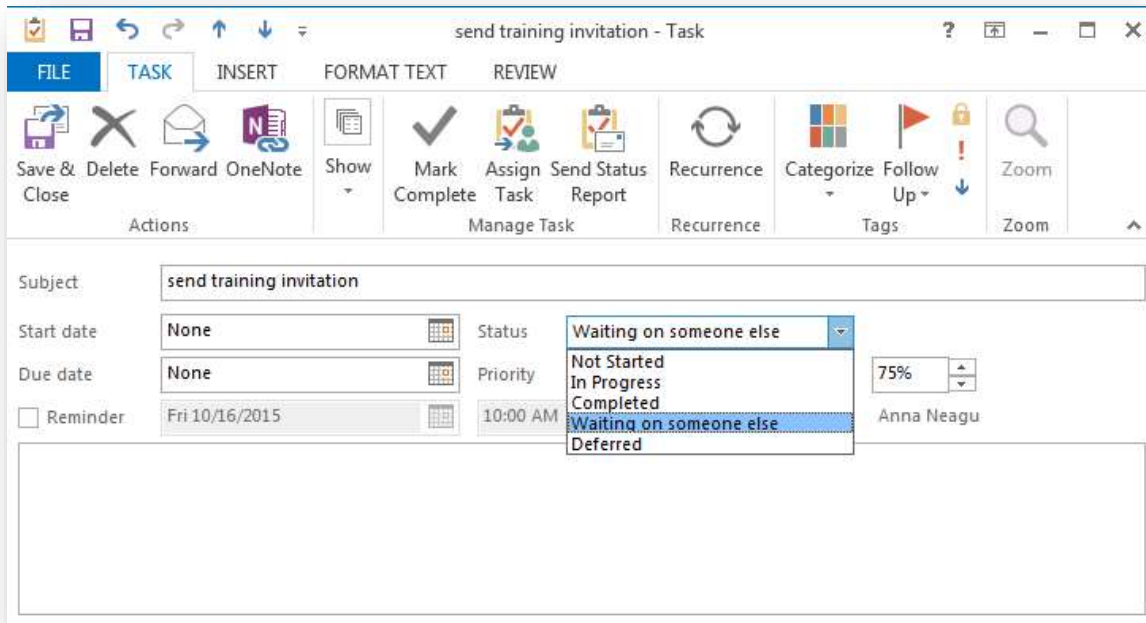
To update the status of a task:



Not Applicable

1. Open the task window.
2. In the **% Complete** list, enter or select (by clicking the arrows) the percentage of the project you estimate as complete to change the status to reflect your selection. Tasks that are **0%** complete are **Not Started**, tasks that are **1%** to **99%** complete are **In Progress**, and tasks that are **100%** complete are **Completed**.
3. If you want to manually change the task status—for example, to **Deferred** or **Waiting on someone else**—click that option in the **Status** list.
4. Save and close the task to update the task both in your own task list and in the task originator's task list.

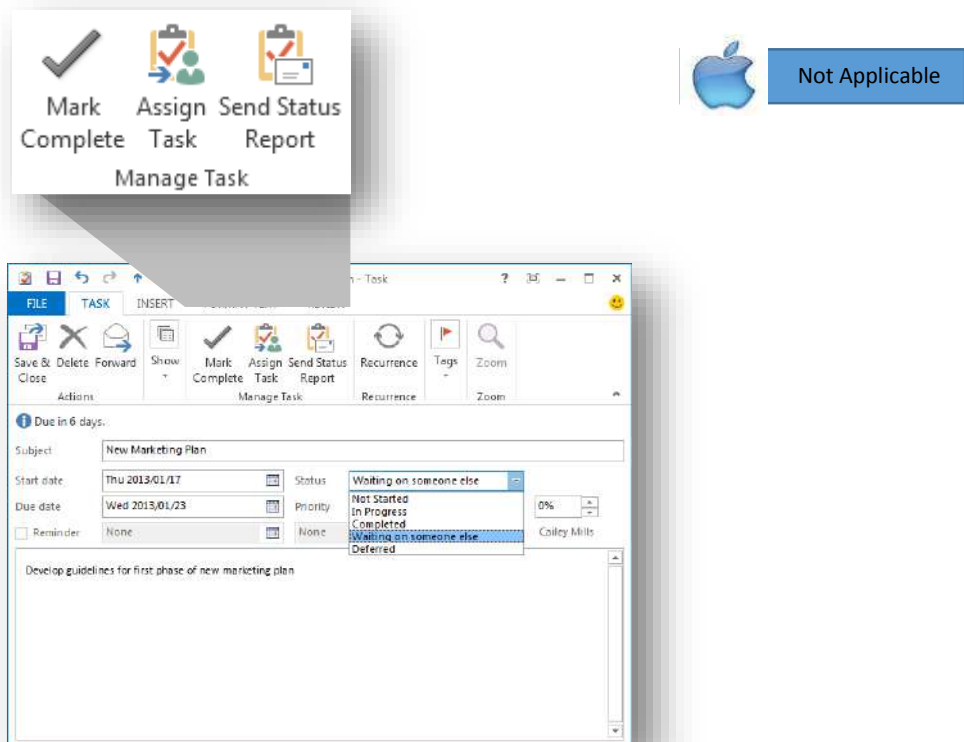
You can't track the status of a flagged message.



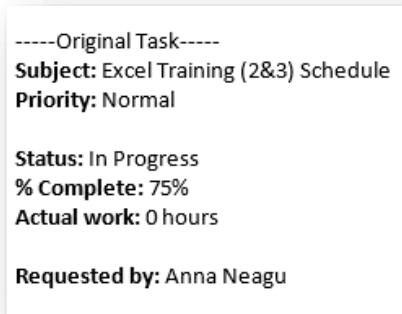
### Sending a Status Report

You can send an e-Mail to inform someone else of the progress you're making on a task.

1. Click the **Tasks** button in the Navigation Bar.
2. Double-click the task you want to work with. The Task item window appears.
3. Click the **TASK** tab on the Ribbon and click the **Send Status Report** button in the **Manage Task**.



An e-Mail message containing a report about the task item appears. It includes the start and due dates, current status, % Complete, the Date completed (if it has been completed), and the number of hours spent on the task.



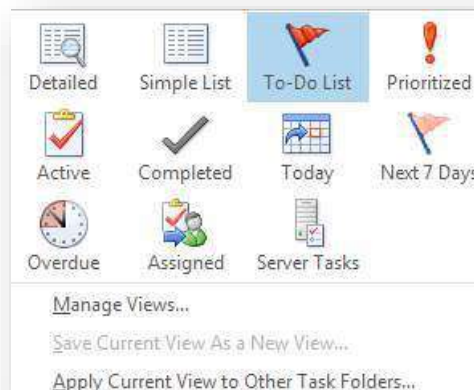
4. Enter a recipient in the To box, type a message, and click the **Send** button. The message is sent.

## Changing Task Views

In the Tasks module, you can display the To-Do List folder, which includes both tasks and flagged messages, or the Tasks folder, which includes only tasks. Outlook provides many options for viewing and arranging the contents of each folder. You can create additional folders to contain task items if you want to.

The main place to keep track of tasks and to-do items is in the Tasks area.

1. Click the **Tasks** button in the Navigation Bar.
2. Click the **HOME** tab on the Ribbon and click the **Change View** button in the **Current View** group.



Organize Tab / Arrange By

<b>Detailed</b>	Displays many details about each task, including color category and percentage complete.
<b>Simple List</b>	Displays a few details so you can see your tasks at a quick glance. The In Folder column tells you whether the to-do item is a flagged e-Mail item or a task.
<b>To-Do List</b>	Displays all tasks and to-do items with very little detail. Also displays Reading Pane.
<b>Prioritized</b>	Displays all tasks in order of priority in a list.
<b>Active</b>	Displays tasks that are incomplete (including overdue ones) in a list.
<b>Completed</b>	Lists all tasks that have been marked complete.
<b>Today</b>	Displays a list of all tasks due today.
<b>Next 7 Days</b>	Displays tasks that are due in the next seven days in a list.
<b>Overdue</b>	Displays tasks that are overdue in a list.
<b>Assigned</b>	Shows only the tasks that have been assigned to others, sorted by the task owner's name and due date.
<b>Server Tasks</b>	Displays a lists of tasks stored on the server.

3. Select the view you want to use.
4. Double-click a task to view it.



*In Tasks, you can use the Instant Search feature to find tasks and to-do items. Simply enter search keywords in the **Search Tasks** box at the top of the Tasks list screen or in the Search To-Do List box at the top of the To-Do List screen*



*To help you organize and locate tasks, you can assign color categories to them.*

### View tasks in the To-Do Bar



Not Applicable

You can also keep tabs on your tasks and to-do items using the To-Do Bar.

1. If necessary, click the **To-Do Bar** drop-down in the Layout group button and select **Tasks**. The expanded To-Do Bar appears on the right side of the screen. At the bottom of the To-Do Bar, below the calendar and appointments, you can see all your tasks and flagged to-do items.

2. Double-click a task to view it.



## View tasks in Calendar

You can also access your tasks in the Daily Task List in Calendar.



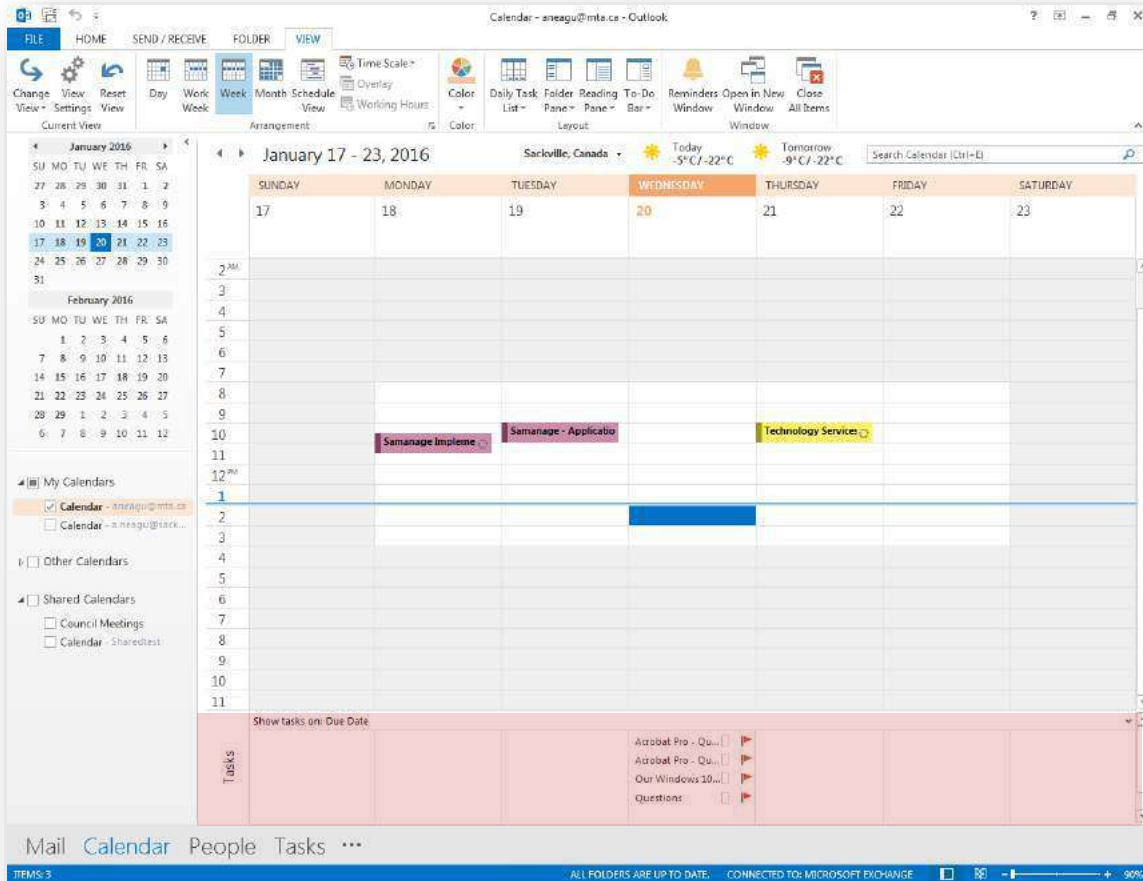
2016 Not Applicable

2011 Tools Tab / My Day

1. Click the **Calendar** button in the Navigation Bar.

The Calendar appears. In Day and Week views you can see a Tasks area beneath the calendar. Here you can view and work with tasks and to-do items. If it is not showing, click the Daily Task List button in the Layout group on the VIEW tab.

2. Double-click a task to view it.



## Assigning a Task

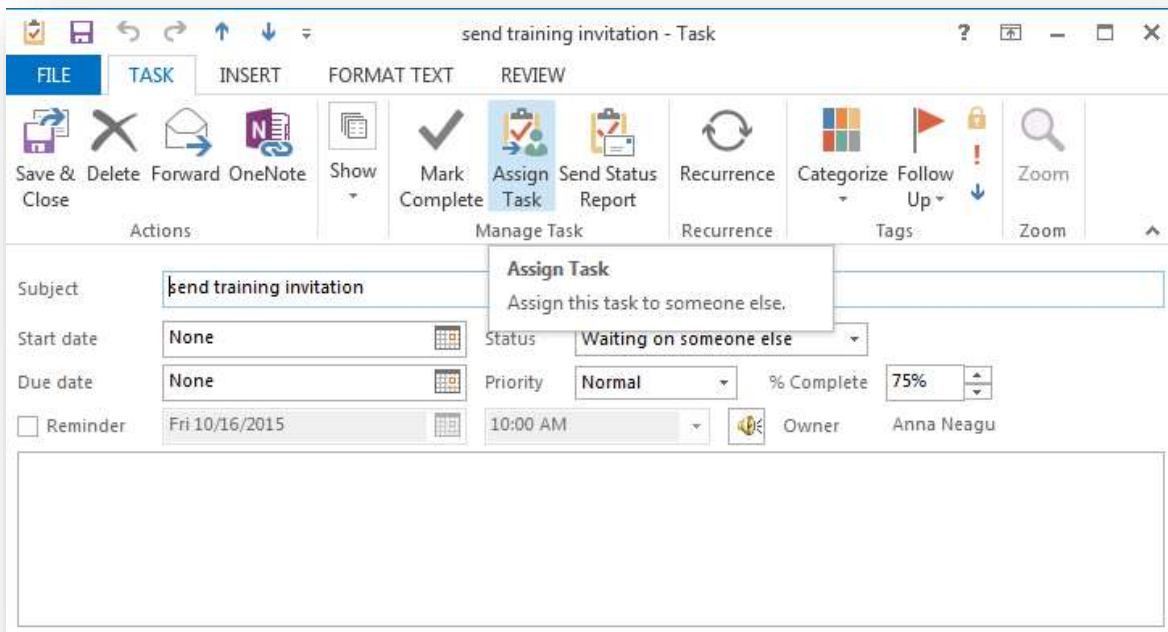


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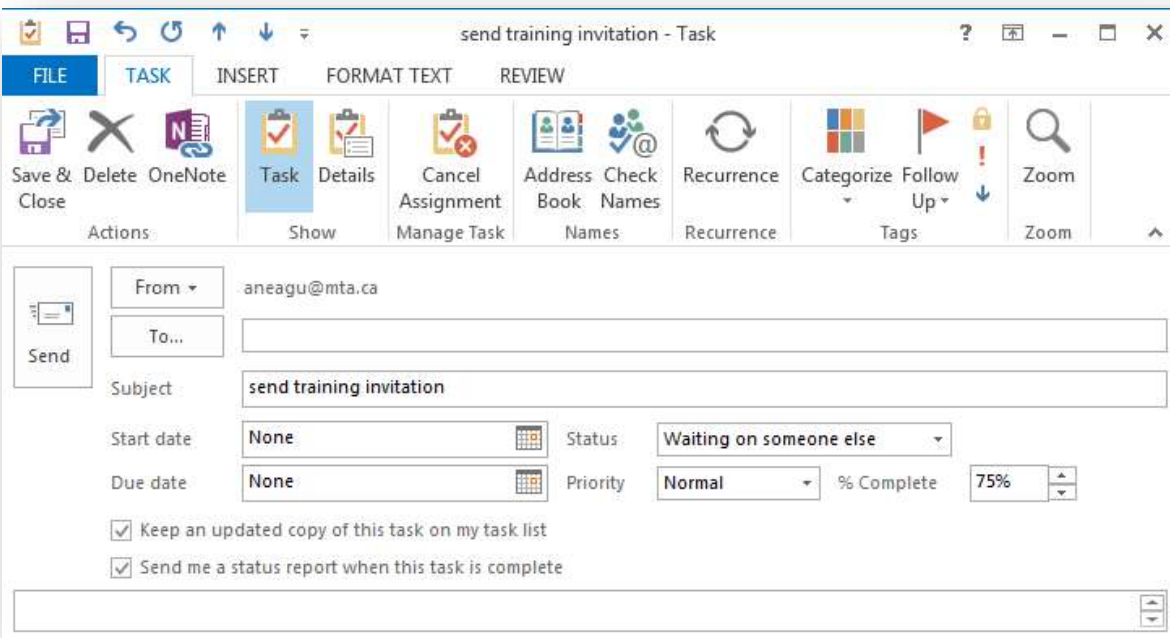
Besides creating tasks for yourself, you can assign a task to someone else. A task request is sent by e-Mail, and the recipient can accept or decline it.

To delegate a task to another Outlook user:

1. Open the task in the task window. On the **Task** tab, in the **Manage Task** group, click the **Assign Task** button.



2. In the **To** box that appears in the task header, enter the name or email address of the person you want to assign the task to.



3. Review the task subject, dates, status, priority, and completion settings and ensure that they are as you want them—after you assign the task, you will no longer be able to change the task details.

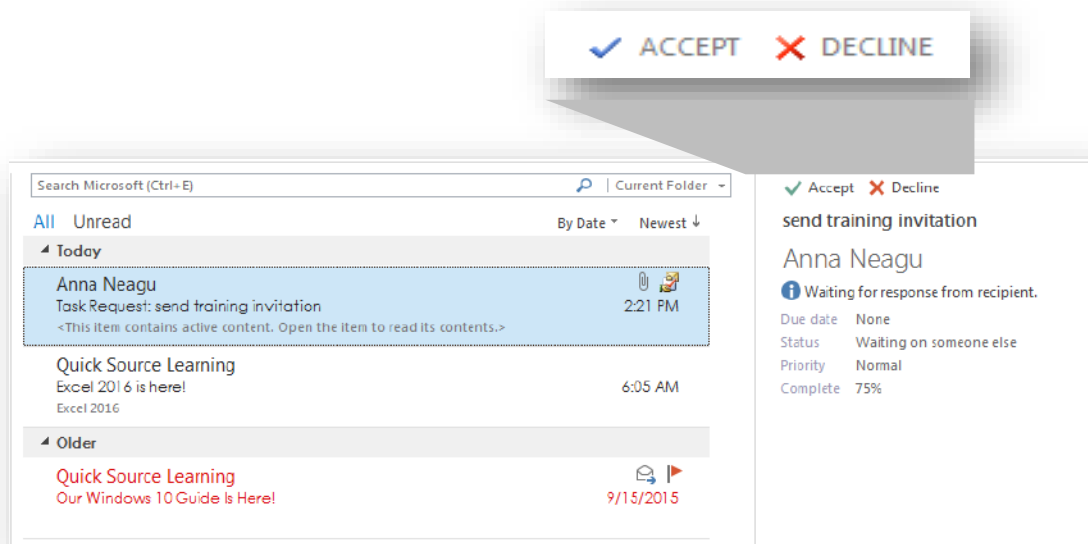
4. Make sure the **Keep an updated copy of this task on my task list** and **Send me a status report when this task is complete** check boxes are selected.
5. In the task header, click the **Send** button. If a message box notifies you that the task reminder has been turned off, click **OK** to send the task request and notify you when the assignee accepts or declines the task.

### Accept or decline an assigned task



To accept, decline, respond to, or reassign a task request:

1. Accept or decline the task from the **Reading Pane**, or open the task request to see additional options for managing the task request on the **Task** tab of the task window ribbon.



2. Take one of the following actions:
  - In the **Respond** group, click the **Accept** button to accept the task or the **Decline** button to decline the task, and send the associated response to the task owner.
  - In the **Respond** group, click **Reply** to send a message to the task owner without accepting or declining the task, or the **Forward** button to forward the task content to another person without reassigning the task.



*Once you mark the task's status as Complete, an e-Mail will be sent to the person who assigned the task, notifying him or her of the task's completion.*

## Forward a task



Not Applicable

If you just want to send a copy of a task to someone without assigning it to that person, you can forward the task.

1. Click the **Tasks** button in the Navigation Bar. The To-Do List appears.
2. Right-click the task you want to forward and select **Forward** from the contextual menu. An e-Mail message appears with the task included as an e-Mail attachment.
3. Enter the e-Mail address of the person you want to send the task to and click the Send button. The task is sent.

## Completing a Task

Whether you've completed a task, given up on it, or are otherwise through with it, at some point you're going to want to clear some tasks off your list. In this lesson, we'll look at how to go about completing, clearing, and deleting tasks.

### Mark as complete



Similar to 2013

You can mark tasks and to-do items as complete once you're done with them.

1. Click the **Tasks** button in the Navigation Bar. The To-Do List appears.
2. In Simple List view, click the **Complete** check box next to the completed task. The task appears with a line through it to let you know it is complete.

<input type="checkbox"/>	Password Expiry Notification	None
<input type="checkbox"/>	RE: Works Garage software / Workorder #56494	None
<input type="checkbox"/>	Send Email	Mon 1/25/2016
<input checked="" type="checkbox"/>	Send Email	Wed 1/20/2016

Other Ways to Mark a Task as Complete:

- ☑ **Right-click** a task anywhere it's displayed and select **Mark Complete** from the contextual menu.
- ☑ Click the item's **flag**.
- ☑ **Open** the task's item window, click the **Status** list arrow, and select Completed or enter 100% in the % Complete box.

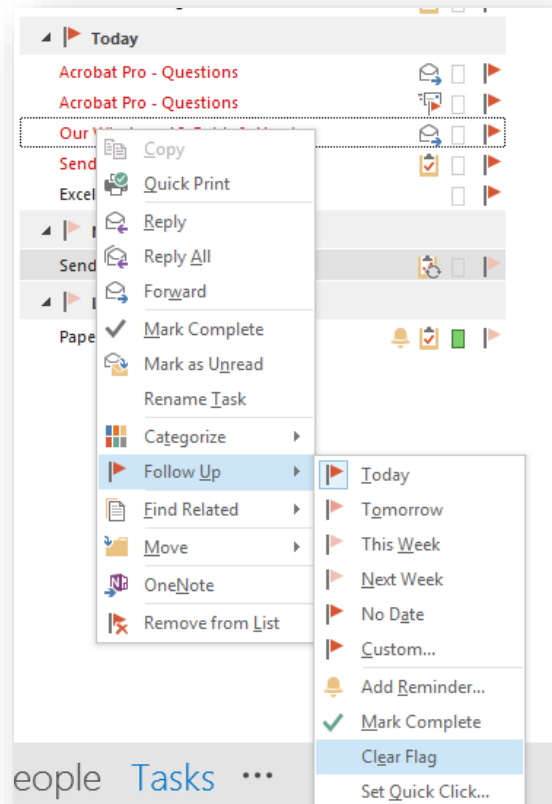


Similar to 2013

### Clear a follow-up flag

You can remove to-do items that are not tasks—such as e-Mail messages marked with a flag for follow-up—from the To-Do List by clearing the item's flag.

Right-click the to-do item and select **Follow Up** → **Clear Flag** from the contextual menu. The item is no longer flagged and is not included on To-Do List.



*What's the difference between clearing a flag and marking it as complete? Marking a to-do item as complete is better for your records because it still appears in the to-do list. By clearing a flag, it's as though the item was never flagged, which may cause confusion in the future.*

## Delete a task

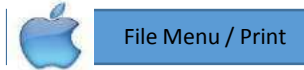
You can also delete a task whether it's completed or not.



Similar to 2013

1. Select the task. You can select the task in the To-Do List, Task list, To-Do Bar, or Calendar.
2. Click the **HOME** tab on the Ribbon and click the **Delete** button in the Delete group. The task is deleted.

## Printing Tasks



You can print a list of your tasks or just individual tasks.

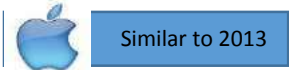
### Print a task list

1. Click the **Tasks** button in the Navigation Bar. Whichever list is visible will be the one that is printed. If you want only tasks to be printed, make sure the Tasks list is displayed. If you'd rather print all your to-do items, make sure the To-Do List is displayed.
2. Click the **FILE** tab on the Ribbon and select **Print**. Options for printing your Tasks appear.
3. Click the **Print** button. The list prints.

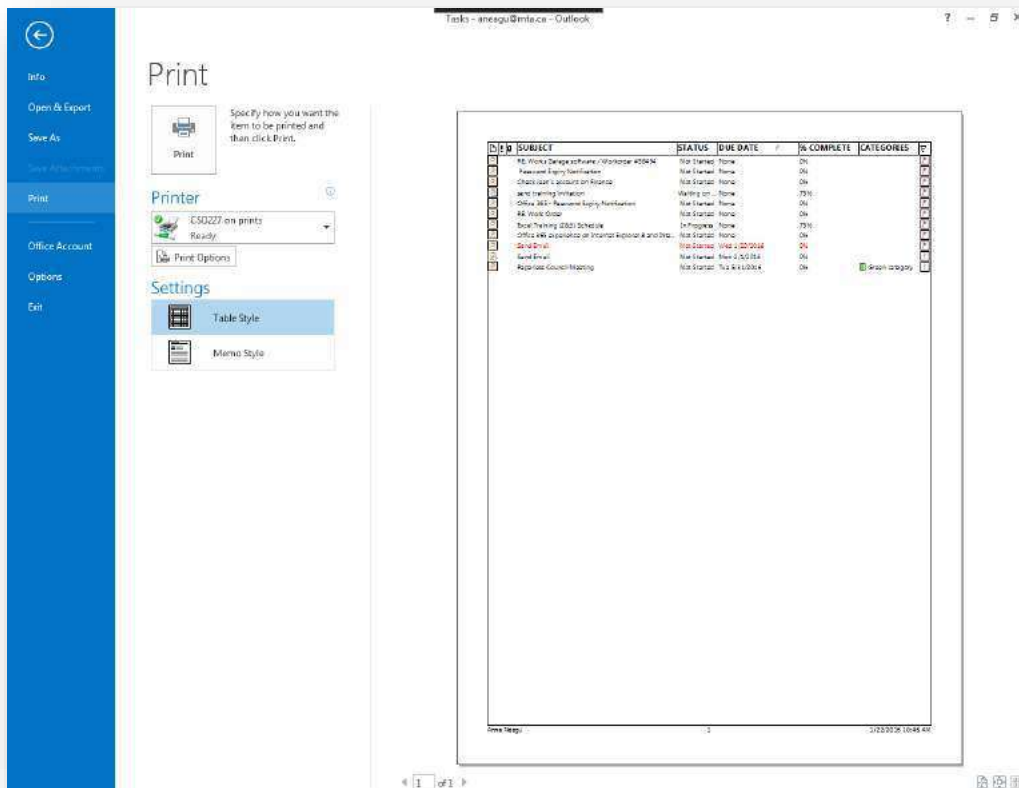


*Only Table Style is available for printing tasks. The exceptions are the Active and Assigned views, which also have Memo Style.*

### Print a task item



1. Click the **Tasks** button in the Navigation Bar. The To-Do List appears.
2. Double-click the task you want to print. The Task item window appears.
3. Click the **FILE** tab on the Ribbon and select **Print**. Options for printing your Tasks appear.
4. Click the **Print** button. The task prints.



## More Outlook Features

### IN THIS CHAPTER

Creating and Using Search Folders

Setting Email Rules

Using Mailbox Cleanup

Manually Archiving and Retrieving  
Information

Dealing with Junk Email

*Microsoft has set up the program to function in the way that will be of the most use to the most people, but the fact is that each of us has a different working style and has different needs for our working environment. Fortunately, you can configure many aspects of the appearance and functionality of Outlook 2013 to make it the most efficient platform for the way you work.*

### Creating and Using Search Folders



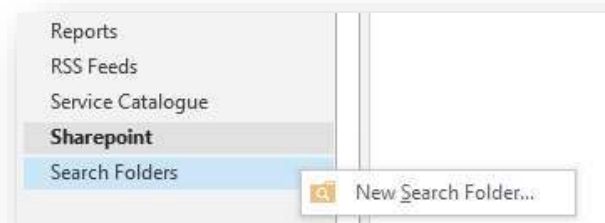
Search Folders are valuable e-Mail organization tools. Unlike the other Outlook folders, Search Folders are virtual folders that display messages that match specific criteria. The message themselves are stored in other Outlook folders, such as the Inbox.

Because you don't have to constantly move and copy items to other folders in Outlook, Search Folders are easy to use and are more effective for sorting and organizing than standard folders.

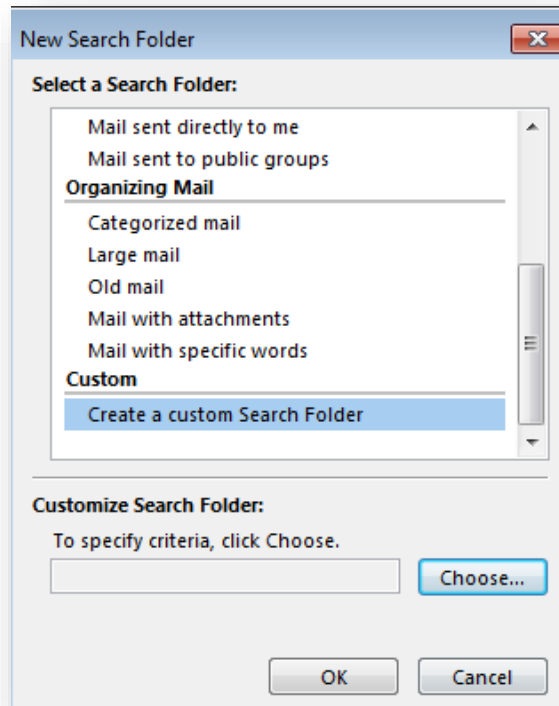
#### Create a custom Search Folder

You can create your own custom Search Folders to view e-Mail messages.

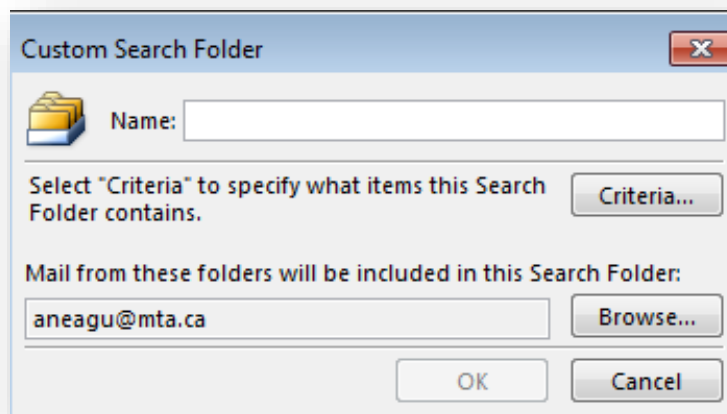
1. Right-click on the **Search Folders** button on the Navigation Pane and select **New Search Folder**.



The New Search Folder dialog box appears. You can create a new Search Folder using one of the options in the list. All you need to do is select an option and enter any additional criteria. You can also create a custom Search Folder to meet more specific criteria.

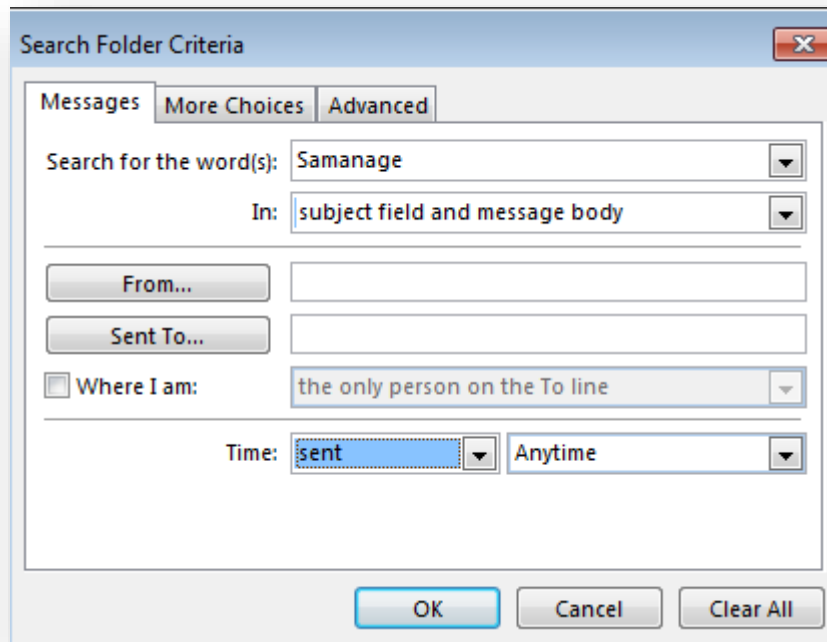


2. Select **Create a custom Search Folder** from the bottom of the list and click the **Choose** button. The Custom Search Folder dialog box appears.
3. Type a name for the Search Folder in the Name box. Choose a name that describes the Search Folder.

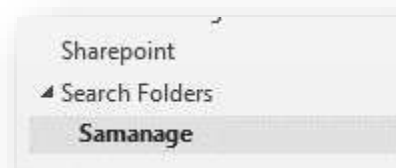


4. Click the **Criteria** button. The Search Folder Criteria dialog box appears. Here you can select criteria on the Messages, More Choices, and Advanced tabs.





5. Enter criteria for the Search Folder and click **OK**.
6. Click the Browse button. The Select Folder(s) dialog box appears.
7. Select the folders you want to search and click OK. Your Search Folder is created; you simply need to exit the dialog boxes.
8. Click **OK** twice. The dialog boxes closes, and your Search Folder appears in the Navigation Pane.



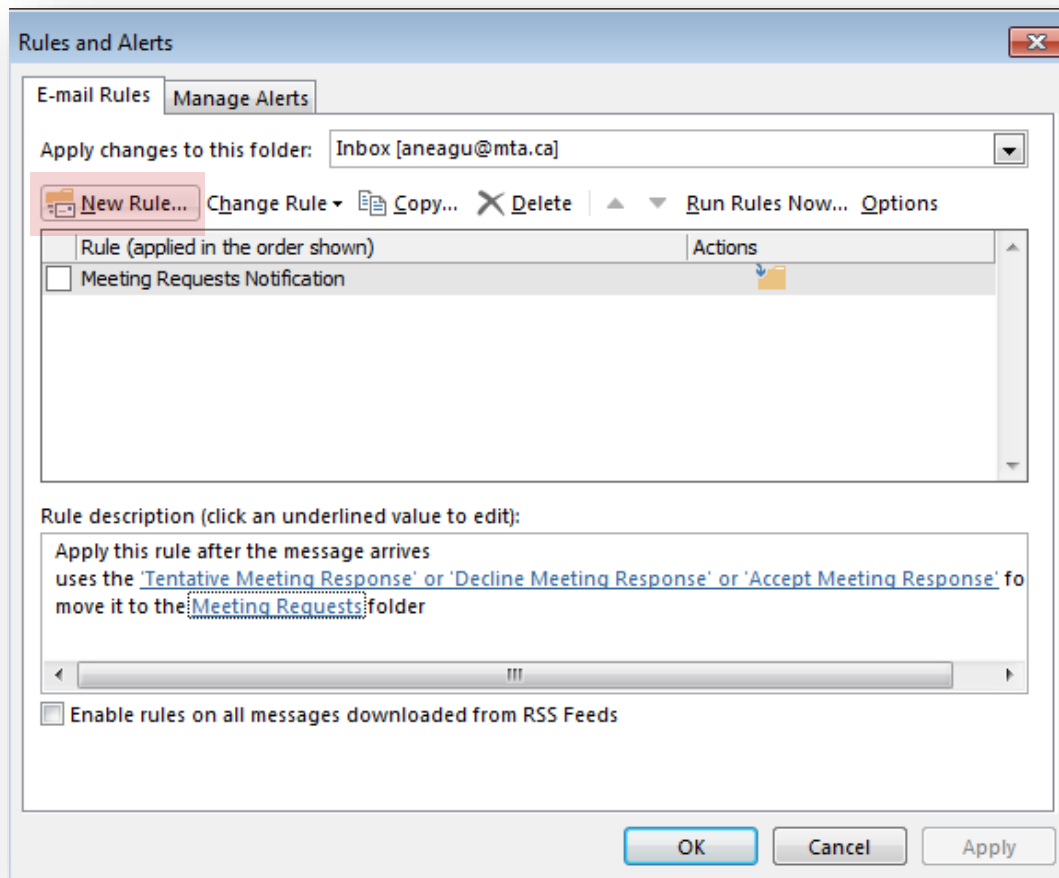
## Setting Email Rules



Home Tab / Rules / Create Rule

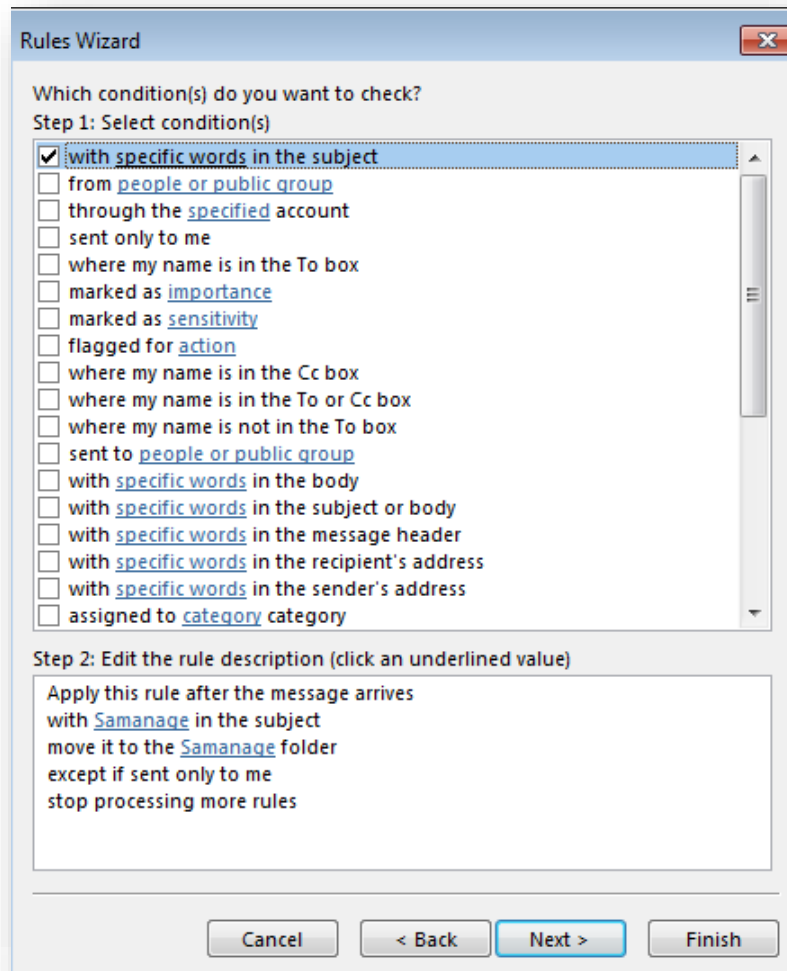
You can have Outlook evaluate your incoming or outgoing email messages and take various actions with them based on sets of instructions you set up, called *rules*. You can create rules based on different message criteria, such as the message sender, message recipients, message content, attachments, and importance. By using rules, you can have Outlook move, copy, delete, forward, redirect, reply to, or otherwise process messages based on the criteria you specify. You can choose from a collection of standard rules or create your own.

1. On the **Info** page of the **Backstage** view, click the **Manage Rules & Alerts** button to display the **Email Rules** page of the **Rules and Alerts** dialog box.

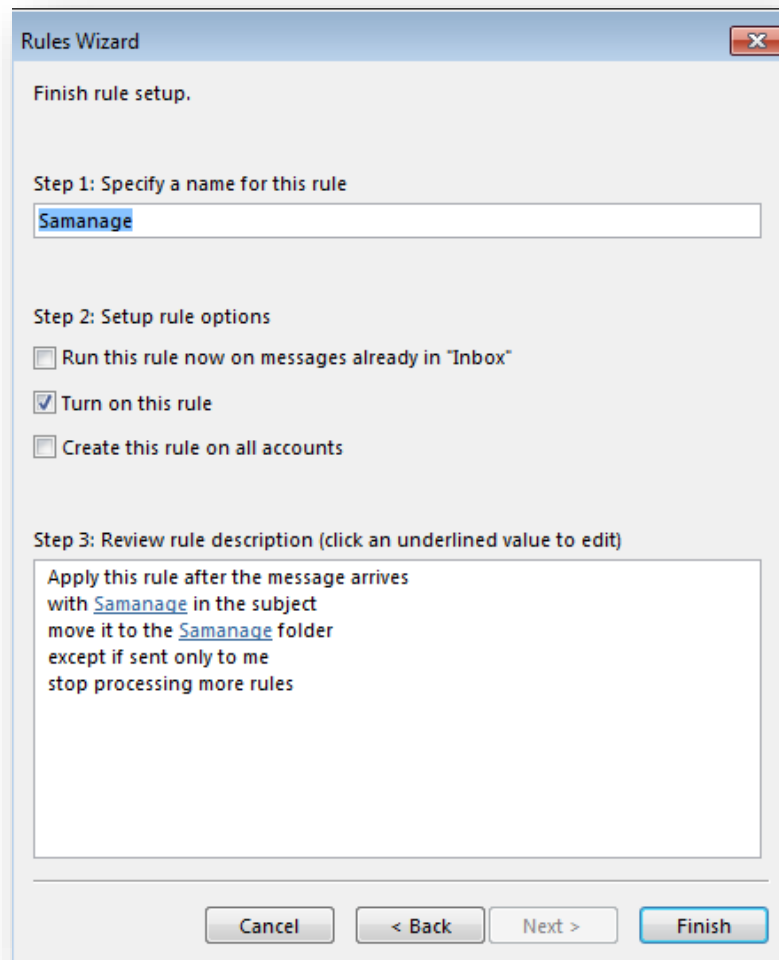


2. On the **E-mail Rules** page, click **New Rule** to start the **Rules** wizard. You can base a rule on one of the nine rule templates provided by Outlook, or you can start from a blank rule for incoming or outgoing messages. *The wizard leads you through the steps of creating a standard or custom rule.*
3. Under Step 1: Select a template, select the template that you want from the Stay Organized or Stay Up to Date collection of templates.
4. Under Step 2: Edit the rule description, click an underlined value. For example, if you click the people or public group link, the Address Book opens.
5. Click Next.
6. Under Step 1: Select condition(s), select the conditions that you want the messages to meet for the rule to apply.
7. Under Step 2: Edit the rule description, click an underlined value for any condition that you added, and then specify the value.
8. Click Next.
9. Under Step 1: Select action(s), select the action that you want the rule to take when the specified conditions are met.

10. Under Step 2: Edit the rule description, click an underlined value for any action that you added, and then specify the value.



11. Click Next.
12. Under Step 1: Select exception(s), select any exceptions to the rule, and then click Next.
13. Under Step 2: Edit the rule description, click an underlined value for any exception that you added, and then specify the value.
14. Click Next.
15. Under Step 1: Specify a name for this rule, enter a name.
16. Under Step 2: Setup rule options, select the check boxes for the options that you want.
  - If you want to run this rule on messages that already are in the Inbox, select the Run this rule now on messages already in "Inbox" check box.
  - By default, the new rule is turned on. To turn off the rule, clear the Turn on this rule check box.
  - To apply this rule to all email accounts set up in Outlook, select the Create this rule on all accounts check box.



17. Click **Finish**.

## Using Mailbox Cleanup



Organize Tab / Arrange By Size

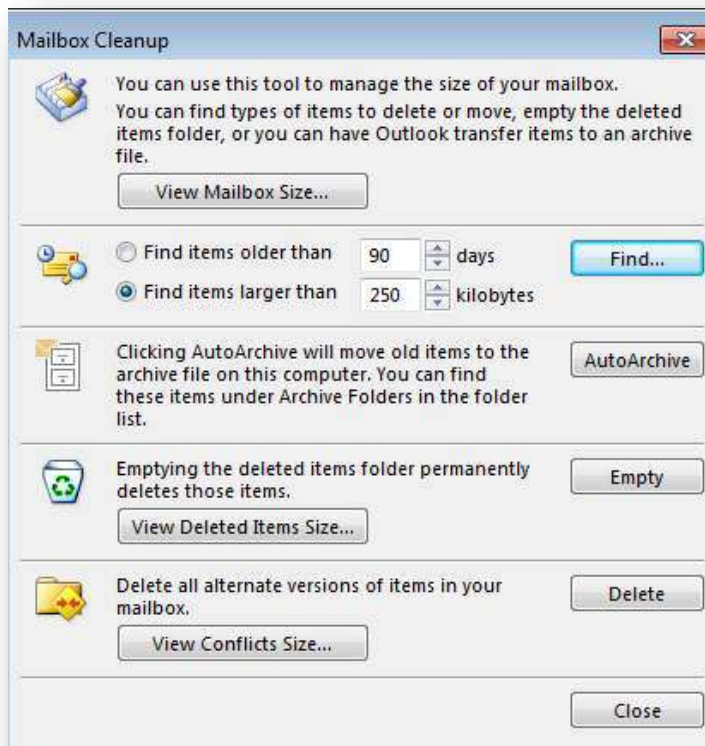
Like a physical Mailbox, your Outlook Mailbox fills up over time. Knowing the size of your Mailbox, the amount of free space you have, and how to clean up your Mailbox helps keep things organized.

You should periodically empty your Mailbox. Use the Mailbox Cleanup dialog box to help you empty Outlook of unnecessary or duplicate items.

1. Click the **FILE** tab on the Ribbon and select **Info**. Information about your e-Mail account appears.



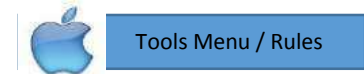
2. Click the **Cleanup Tools** button and select Mailbox Cleanup. The Mailbox Cleanup dialog box appears. Use any of the following methods to reduce the size of your Mailbox:



- **View Mailbox size:** Click the **View Mailbox Size** button to view the total size of your Mailbox as well as the size of each folder.
- **Find items:** Search for items to delete based on their age or size.
- **Auto-Archive items:** Archive old items. These items will still be available under Archive Folders in the Folder List.
- **Empty the Deleted Items folder:** View the size of your Deleted Items folder and permanently delete items.

- **Delete conflicts:** View conflicts and delete any alternative versions of items in your Mailbox.
- 3. Select the options you wish to use and follow the prompts.
- 4. When you're finished, click the **Close** button in the Mailbox Cleanup dialog box. Your changes are applied.

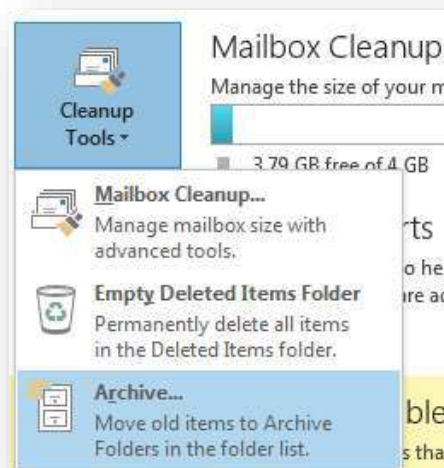
## Manually Archiving and Retrieving Information



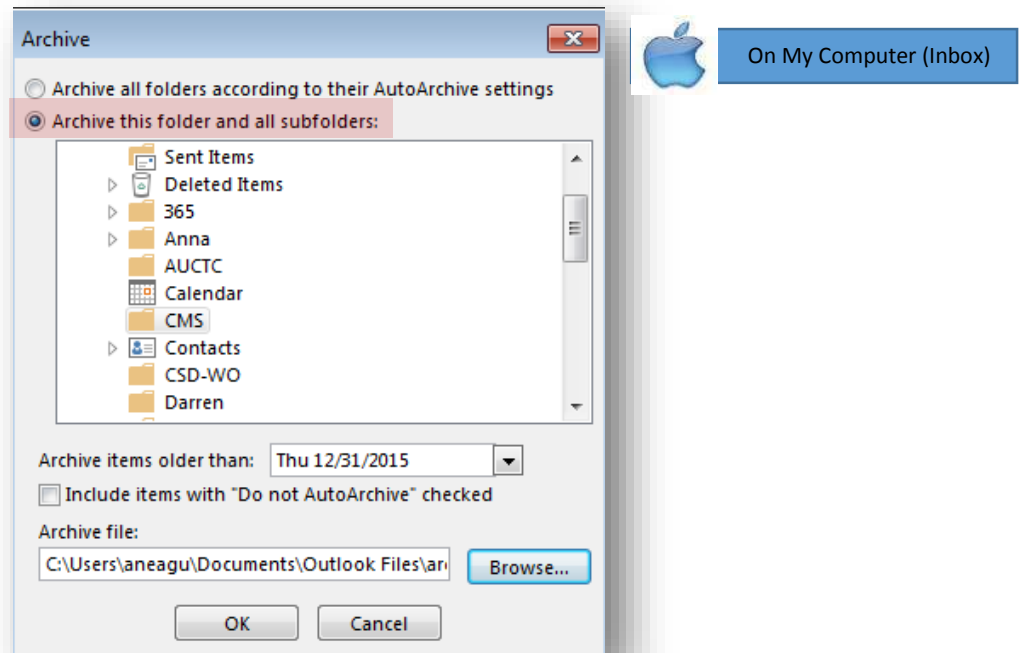
As your folders become larger, Outlook becomes slower, and finding items can become increasingly difficult. That is where archiving becomes useful. When you archive Outlook information, you transfer old items to a storage file. The items are then deleted from their original folder in Outlook.

Because archived items are copied to the archive file and then removed from Outlook, be cautious about what you archive. This lesson explains how to archive Outlook information manually.

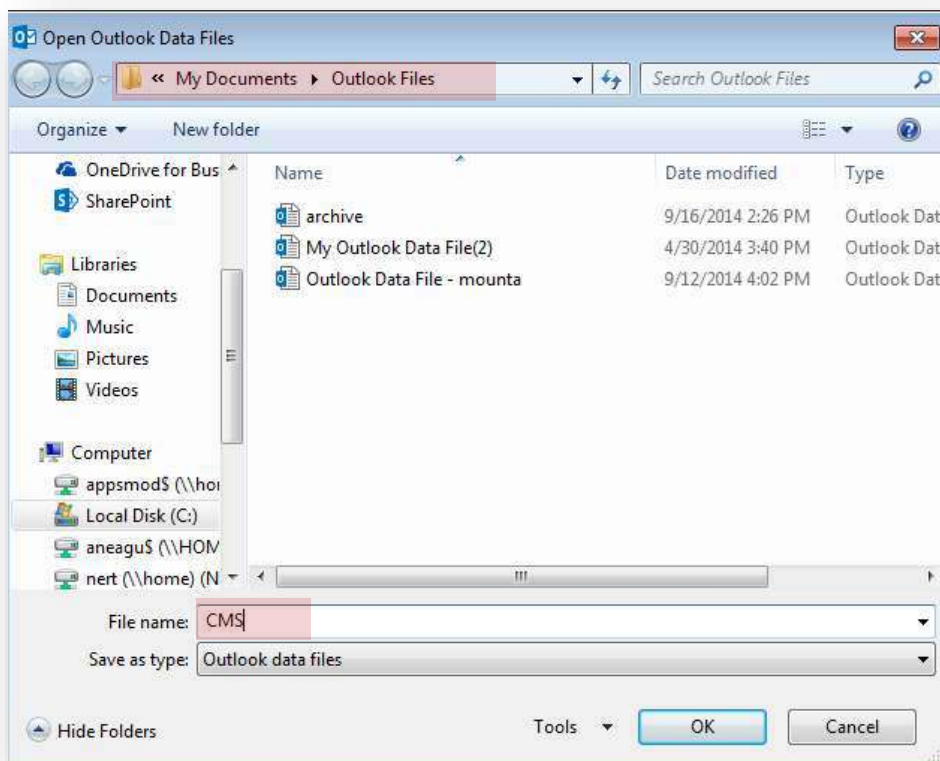
1. Click the **FILE** tab on the Ribbon and click the **Cleanup Tools** button. A list of options appears.
2. Select **Archive** from the list. The Archive dialog box appears.



3. Make sure that the **Archive This Folder and all subfolders** option is selected. This option will let you specify which folder you want to archive. If you choose the other option, "Archive all folders according to their AutoArchive settings", every folder in Outlook (except those not set to archive) will be archived.
4. Select the folder that you want to archive. If you want to archive everything, select **Mailbox** and all the folders will be archived. Now choose the date at which you want to begin archiving.
5. Click the **Archive items older than** list arrow and select the how old an item must be in order to be archived. All items older than the date specified will be moved into the archive file. Items that are newer remain in Outlook.



- (Optional) Specify the name and location of the archive file in the **Archive File** box. The default location is a folder called Archive, and the archive is saved as an Outlook Data File (.pst).



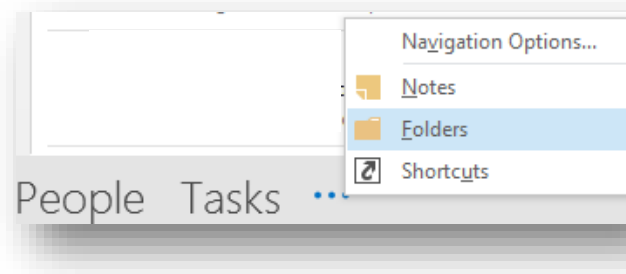
Note: If you specify a new name and location for the archive file, make sure you use the same file when you archive information in the future. Newly archived items are just added to the archive, so you'll want to make sure they're all in the same place.

7. Click **OK**.

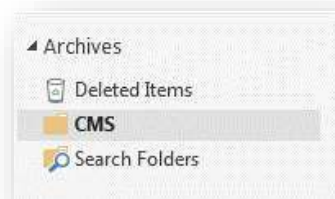
## Access archived items

Your archiving system is working great. Unfortunately, you need to find an e-Mail message archived two years ago. No problem – the archived items are just a few clicks away.

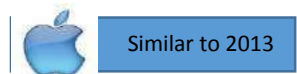
1. Click the ellipsis button ... on the Navigation Bar. Click the **Folders** button. The Folder List appears in the Navigation Pane.



2. Select **Archive Folders** (or the name you specified for your archived items) in the Folder List. The archive appears.



## Dealing with Junk Email



Unsolicited Mail, known as spam, is easily the most annoying aspect of e-Mail, and it's increasing at an alarming rate. When you get unwanted Mail, Outlook 2013 will automatically filter it into a separate folder, based on the content and structure of the message. It doesn't catch all spam, and occasionally a good message will end up in the Junk E-Mail folder, so it's a good idea to understand how Outlook deals with spam.

On the other hand, you might not be aware that one or more messages has been redirected to your Junk E-mail folder; if someone tells you that he or she has sent you a message but you haven't received it, it's a good idea to check whether it's in your Junk E-mail folder.



You can display the contents of the Junk E-mail folder by clicking **Junk E-mail** in the Folder Pane. When the Junk E-mail folder contains one or more messages, the number of messages in the folder is shown in parentheses at the end of the folder name. If any of the messages in the folder have not been read, the folder name is bold.



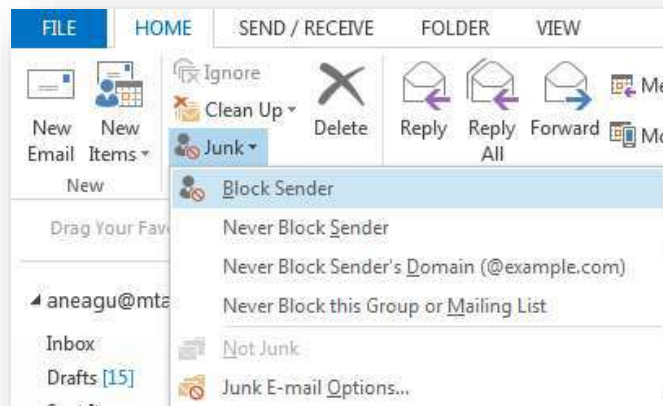
Junk E-Mail

Outlook converts message content in the Junk E-mail folder to plain text and disables any active links or content within the message. The InfoBar in the message header provides specific information about the message's status.

Any remote graphics (graphics that are displayed from Internet locations rather than embedded in the message—sometimes called *web beacons*) that were present in the message are converted to URLs, which reveals where the graphics originated.

To process a message from the Junk E-mail folder:

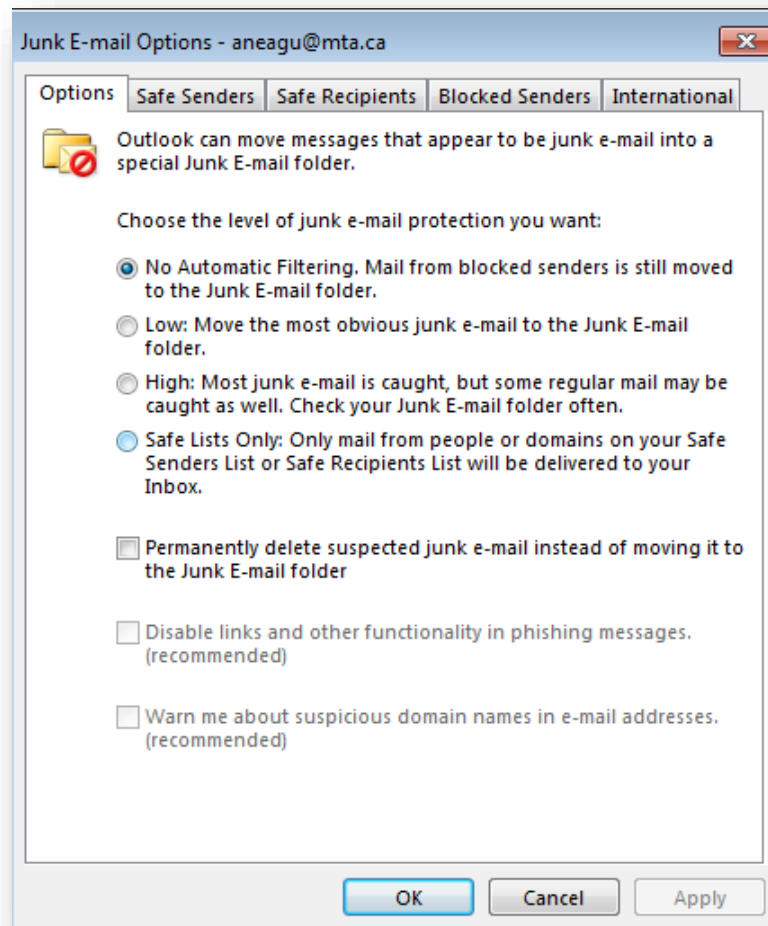
1. Select or open the message you want to process.
2. On the **Home** tab (if you selected the message) or the **Message** tab (if you opened the message), in the **Delete** group, click the **Junk** button to display the options for processing the message.




3. Click one of the first four options in the **Junk** list to block the sender or to add the sender, the sender's domain, or the recipient group to your **Safe Senders** or **Safe Recipients** list. Clicking any of these options does not remove the message from the **Junk E-mail** folder.
4. To move the message to your **Inbox**, click **Not Junk**. If you want to add the sender to your **Safe Senders** list, select the **Always trust e-mail from** check box in the **Mark as Not Junk** message box. Then click **OK**.

## Configuring junk email options

You manage junk mail settings from the Junk E-mail Options dialog box, which you open by clicking **Junk E-mail Options** in the Junk list. You set specific junk email processing options for each email account to which Outlook is configured to connect. The account for which you're configuring options is shown in the title bar of the Junk E-mail Options dialog box.

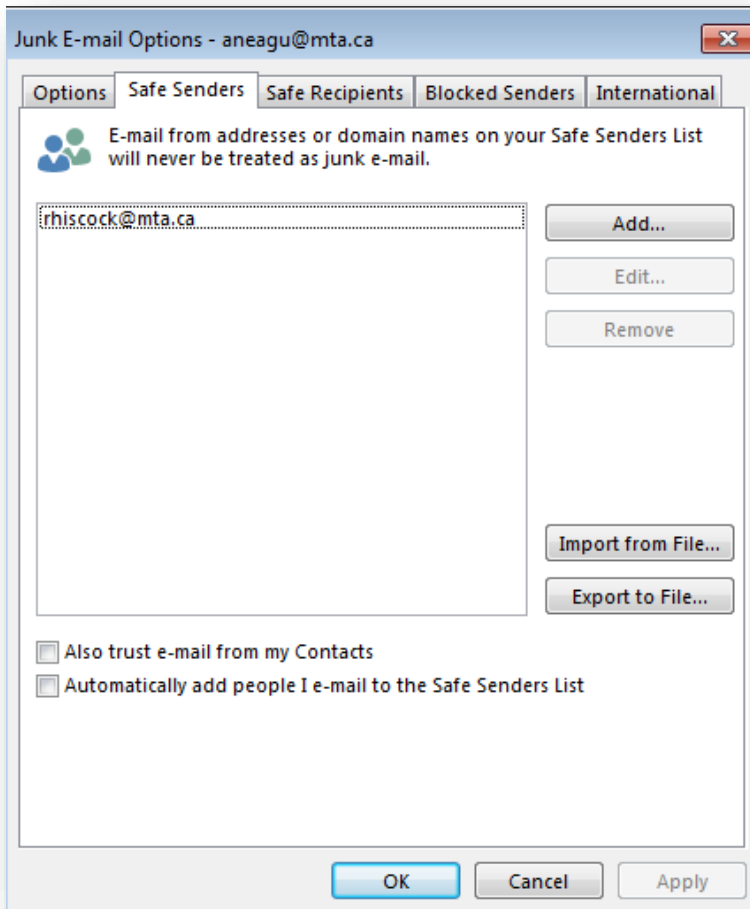


- No Automatic Filtering:** All e-Mail is moved to the Junk E-Mail folder, including e-Mail from blocked senders.
- Low:** Only the most obvious junk e-Mail messages are moved to the Junk E-Mail folder.
- High:** Most junk e-Mail is sent to the junk e-Mail folder, but some regular Mail may be caught as well.
- Safe Lists Only:** All Mail that does not come from your Safe Senders list will be sent to the junk e-Mail folder.

 *If you want Outlook to automatically delete suspected junk email, select the Permanently Delete Suspected Junk E-mail Instead Of Moving It To The Junk E-mail Folder check box. Do not select this check box if you set the protection level to High or to Safe Lists Only. With these settings, it is likely that the Junk E-mail Filter will catch quite a few valid messages that you don't want deleted.*

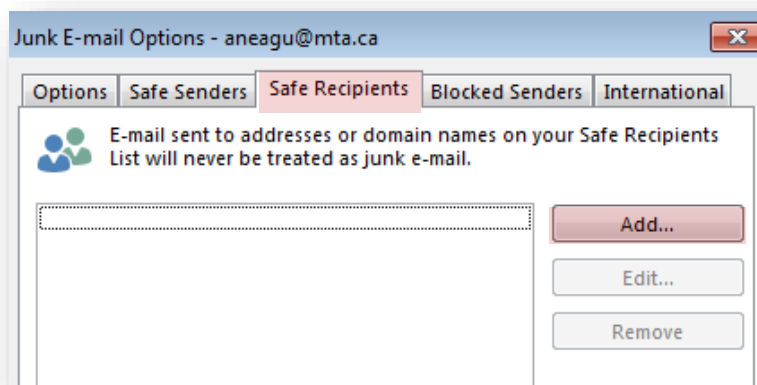
## Adding Addresses to the Safe and Blocked Senders List

- ❑ On the Safe Senders page, you can add a specific person's email address to the Safe Senders list (for example, tom@contoso.com) or specify that email received from any sender at a particular domain is safe by adding only the domain.



*To ensure that messages from your legitimate contacts aren't moved to the Junk E-mail folder, you can select the two check boxes at the bottom of the dialog box.*

- ❑ On the Safe Recipients page, you can add distribution lists or mailing lists of which you are a member to your Safe Recipients list.



## Challenge!

### Exercise 1.

### Class preparation

1. Locate the **MS Outlook - training resources** email you will have received
2. Open the email and drag the attachments to the **Drafts** folder of your mailbox



### Exercise 2.

### Customise Mail layout

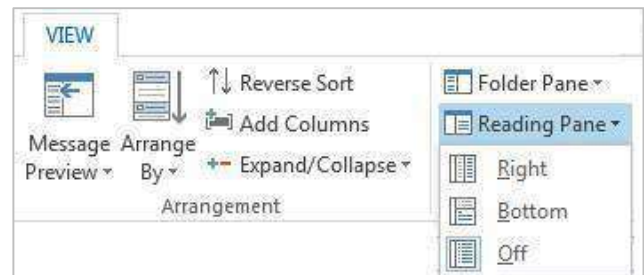
Each section of Outlook has a customizable content pane. This enables you to personalize your screen in each section. This is a local setting you will have to configure on your workstations.

In the mail section

1. Go to the **View** tab
2. Click on the **Reading pane** button
3. Select **Off**

Using your mouse manually adjust the width of the:

- Navigation pane
- Reading pane
- To-Do Bar



### Exercise 3.

### Create and automate email signatures

1. Click **New Email**
- In the new message:
2. Go to the **message** tab
3. Click **Signatures > Signatures...**
4. Click **New**

Create a new signature as a default signature for new emails.



### Exercise 4.

### Send an email

Start a **New** email

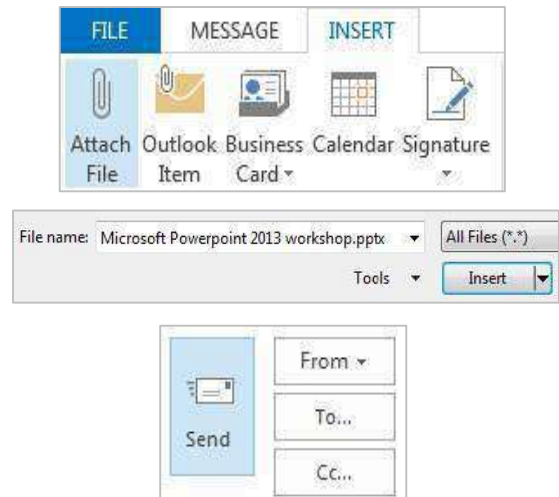
1. Click the **To...** button
2. Search for the recipient
3. Select the user record

4. Click the **To ->** button
5. Insert your **new** signature

Add a contact as an **attachment**:

1. Click the **Insert** tab on the email ribbon
2. Click **Outlook Item**
3. Select contacts folder and a contact item
4. Insert multiple items with CTRL or SHIFT
5. Click **OK**

Check your spelling and grammar and always ensure the content is enterprise appropriate. Emails are persistent business documents.

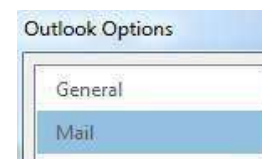


### Exercise 5.

### Manage email settings

Adjust email **notifications**

1. Click the **File** tab
2. Select **Options**
3. Click the **Mail** menu item in the **Options** dialogue box
4. Uncheck the notification boxes as desired



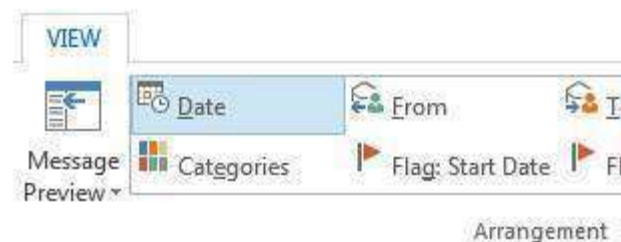
### Exercise 6.

### Adjust email viewing options

Use **conversation view**

Conversation view aggregates emails and summarizes them by subject. As you receive a new email with that subject the whole conversation moves to the top of your email list. This can include emails in other folders.

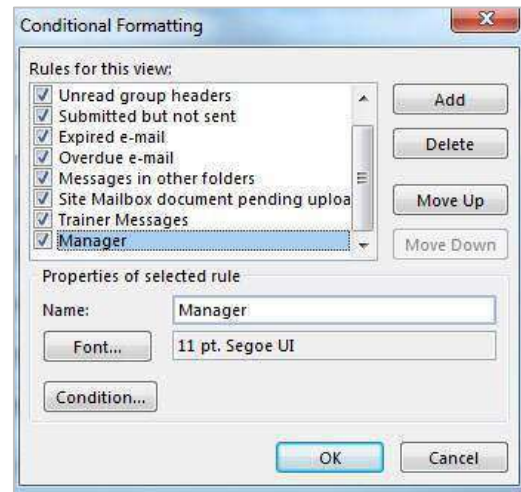
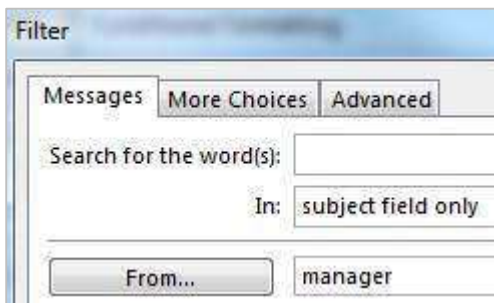
1. Click the **View** tab
2. Select **Date** in the **Arrangement** group
3. Check **Show as Conversations**
4. Select **This folder** button



**Color code** incoming emails

It is possible to use conditional formatting to color code incoming correspondence.

1. Click the **View** tab
2. Click **View Settings**
3. Click **Conditional Formatting**
4. Click **Add**
5. Type **Manager** in the Name field
6. Click the **Condition** button
7. Click the **From...** button
8. Search and select your manager's name from the address book then click **OK**



9. Click the **More Choices** tab
10. Check the **Only items that are:** checkbox
11. Set the list item to **unread**
12. Click **OK**
13. Click the **Font** button
14. Choose a font color
15. Click **OK**
16. Click **OK** to confirm the new condition
17. Click **OK** to confirm the view change



Until you receive a new email from your manager or mark an email as unread no emails will be highlighted according to this rule.

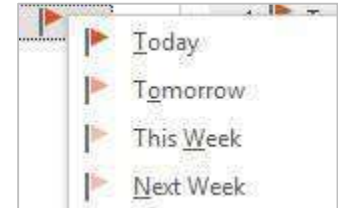
Exercise 7.

Applying flags and categories

Email flags

Use flags as a follow up reminder

- Left click the **Flag** icon on any email
- Left click again to indicate complete
- Right click the **Flag** icon on any email for specific timeframes or to schedule a reminder



Categories

Establishing categories for managing mail will only apply to your own account. Other users will be able to define and apply their own account

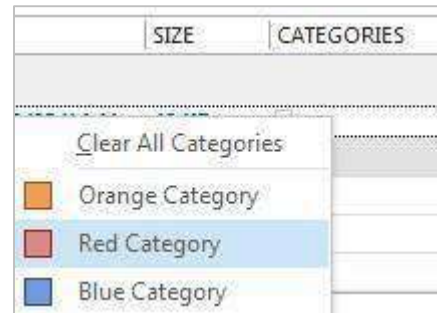
Apply categories

1. Right click in **CATEGORIES** section to access category menu
2. Click on a category to apply

This can be repeated to apply multiple categories.

Apply a category with one click

1. Right click in **CATEGORIES** section to access category menu
2. Select the 'Set Quick Click...'
3. Choose a category to be applied
4. Click **OK**
5. Left click on an email in the Categories section



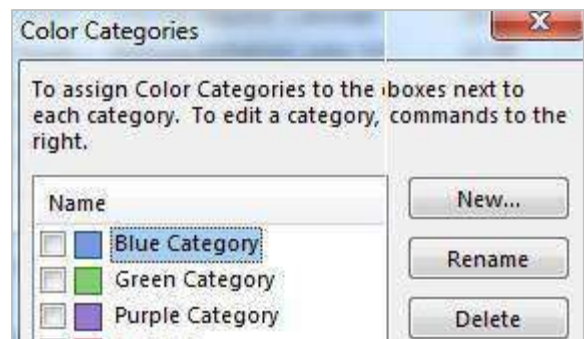
The defined category will be applied to selected messages.

Customise Categories

Right click an email > **All Categories**

OR

- Click the **Categorize** tool in the **Tags** group on the **Home** tab
- Select **Rename** or create **New** categories as required



**Exercise 8.**

**Schedule an out of office message**

1. Click the **File** tab
2. Click **Automatic Replies**

You can add the Out of Office Assistant tool to your quick access toolbar.

3. Click **Send automatic replies** to send replies until manually disabled

In addition: check 'Only send during this time range' to schedule an automated period

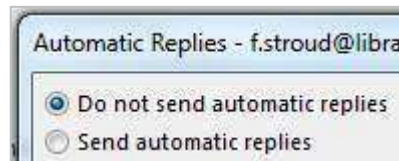
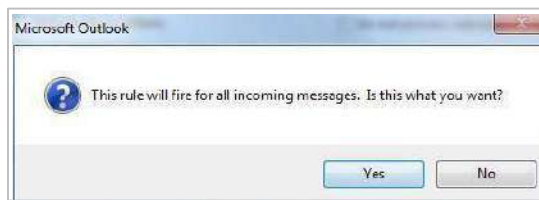
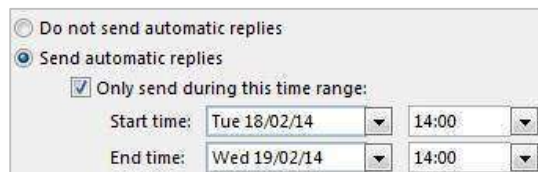
4. Enter a message/s which will be sent in response to any email during your absence
5. Click the **Rules** button
6. Click **Add Rule...**
7. Check the **Forward** box and then click the **To...** button
8. Select a colleague
9. Click **OK**

10. Confirm email forward for all emails by clicking **Yes**  
These rules will be used each time you schedule an out of office period unless they are disabled or deleted.

11. Click **OK** to confirm the rules
12. Click **OK** to schedule the out of office period

To stop Automatic Replies

13. Click on **File**
14. Click on **Automatic Replies** button
15. Select 'Do not send automatic replies' button
16. Click on **OK**

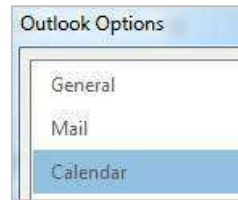




**Exercise 9.**

**Customise calendar settings**

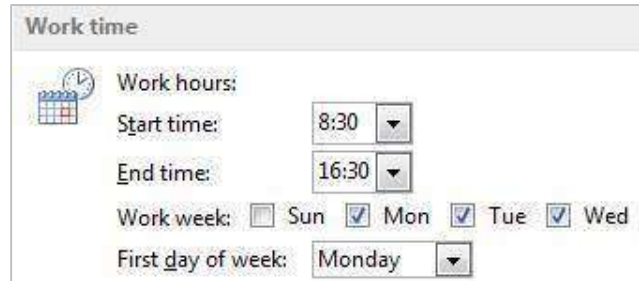
1. Click the **File** tab > **Options**
2. Select the **Calendar** menu item



Set work hours

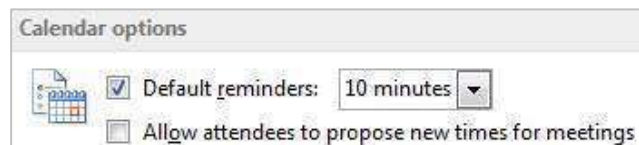
- ✓ Update work schedule to show others your usual work hours.

This will adjust shaded sections on the days you select.



Adjust default meeting reminder

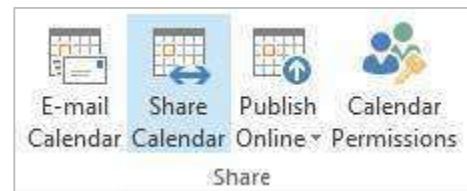
- ✓ Adjust the **Default Reminders** dropdown in **Calendar options**



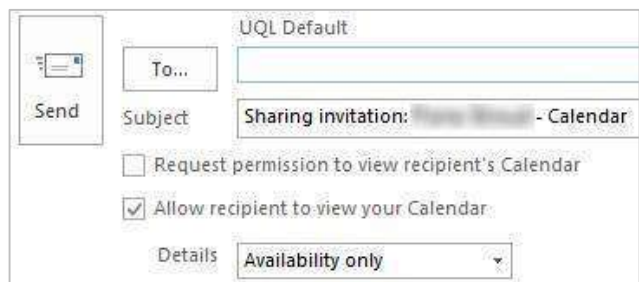
**Exercise 10.**

**Share your calendar**

1. Go to **Calendar** section of **Outlook**
2. Click **Share Calendar** in the **Share** group



3. Choose recipients



4. Check **Request Permission to view recipient's calendar** if appropriate
5. Click **Send**

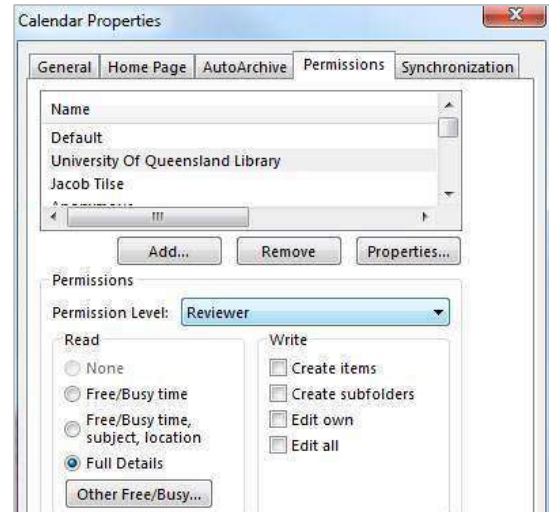
### Customize sharing permissions

1. Click **Calendar Permissions** on the **Share** group



2. Select the staff member and update their permissions as required
3. Click on **OK**

Sharing your calendar enables Read permissions only. You will be required to customize the Write and Delete permissions as required.



### Exercise 11.

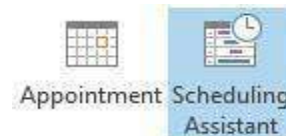
### Schedule a meeting

1. Return to the **Mail** section and select the Timesheet email
2. Click the **Meeting** button in the **Respond** group

When you click Send – meeting invitations will be sent out to recipients.



3. Click the **Scheduling Assistant** button
4. Add recipients



5. Select a date and time, based on the displayed availability
6. Click on **Send**



### Converting appointments and meetings

- ✓ Convert meeting to appointment -> Click **Cancel Invitation**
- ✓ Convert appointment to meeting -> Click **Invite Attendees**

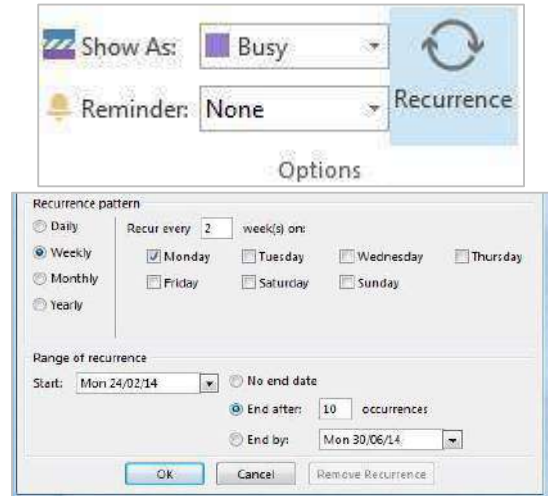


## Recurring appointments

When setting up a meeting:

1. Click the **Recurrence** button in the **Options** group
2. Select recurrence options including frequency and an end date
3. Click **OK**

This offers an invitation to recipients to a series of meetings which will be entered into their calendar.



### Exercise 12.

### ***Respond to meeting invitations***

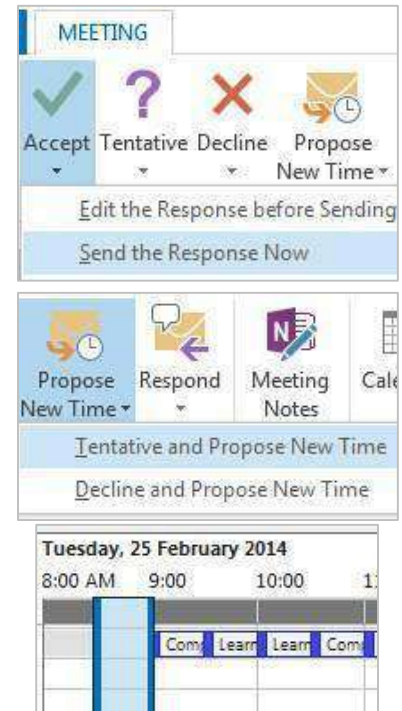
An Outlook meeting invitation is an enhanced email with Yes, Tentative and No buttons on it. It is good practice to answer these invitations and to have Outlook send a response. This ensures that meeting organizers are aware of attendance and can reschedule if necessary.

Click the email invitation:

1. Click one of the attendance options: **Accept/Tentative/Decline**
2. Choose the **Send the Response Now** option

OR

- Click **Propose New Time** with a provisional Tentative or Negative response
- Alter the start and end times and click **Propose Time**



Exercise 13.

Print your calendar

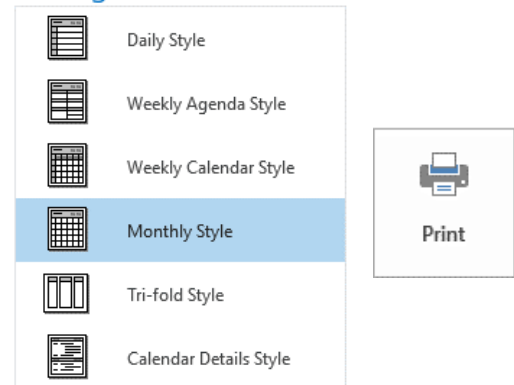
In the Calendar section:

1. Click the **File** tab
2. Click **Print**

OR

- ✓ Press **CTRL + P**
3. Alter the Calendar **print settings**
4. Click **Print**

Settings

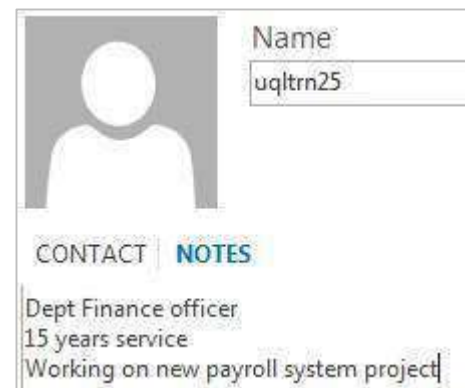


Exercise 14.

Add notes to a contact

Go to the **People** section:

1. Double click a contact
2. Click **Notes**
3. Add relevant notes about **relevant interactions** with this user

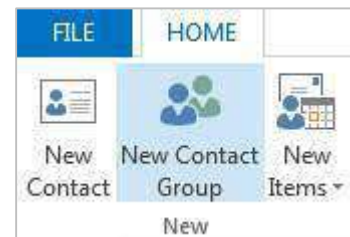


Exercise 15.

Create a contact group

A contact group is an email distribution list you can access from any of the address fields when creating an email or meeting.

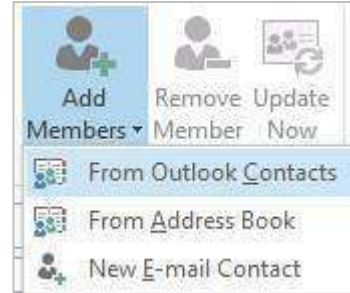
1. Click **New Contact Group**
2. Enter the name '**Outlook 2013 Course**'



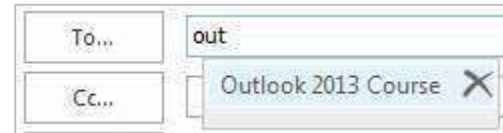
3. Click **Add Members > From Outlook Contacts**

4. Select contacts as appropriate

5. Click **Save & Close**



This group will now be available via autocomplete when you start typing a recipient when sending an email.



### Exercise 16.

### Create a contacts folder

Contact folders hold individual and groups of related contacts.

1. In the Navigation Bar right click on the **Contacts** folder

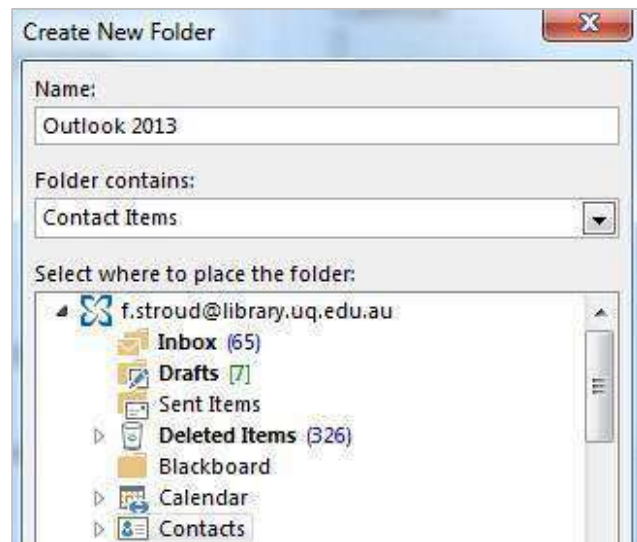
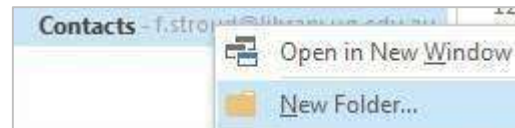
2. Click **New Folder...**

3. Type in the name: '**Outlook 2013**'

4. Select the **Contacts** folder

Ensure a subfolder isn't selected

5. Click **OK**

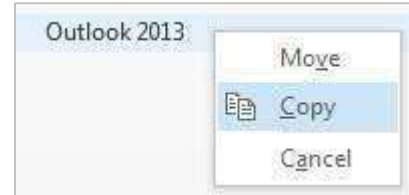


## Populate folder with contacts

1. Select the Contacts folder
2. Locate existing contacts and contact groups

Changing the **Current View** to **List** may speed this process.

3. Hold down the right mouse button over a contact and drag and drop it into the 'Outlook 2013' folder



## Exercise 17.

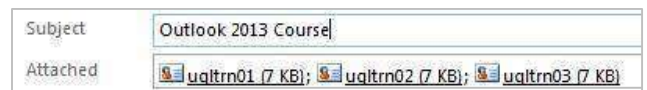
## Share a contacts folder

1. Select the **Outlook 2013** contact folder
2. Click **Forward Contact** in the **Share** group of the **Home** tab > **As an Outlook Contact**
3. Add recipients to the email
4. Click **Send**

The contacts will be sent as an attachment.

## Save a contact attachment

5. Click and drag the attachment over the **Contacts** section
6. Drop the contact into a contacts folder

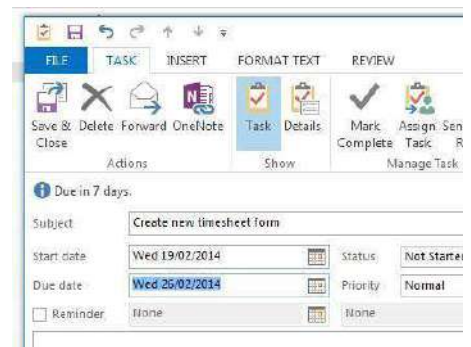


## Exercise 18.

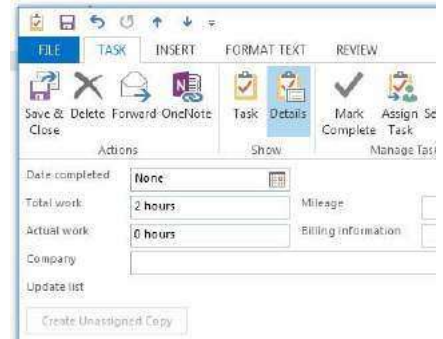
## Create a task

In the Tasks section:

1. Click **New Task**
2. In the Subject field, type: 'Create new timesheet form'
3. Set the start date as today and the finish date **one week from today**
4. Click **Details** in the **Show** group
5. Add '2 hours' to the **Total work:** field



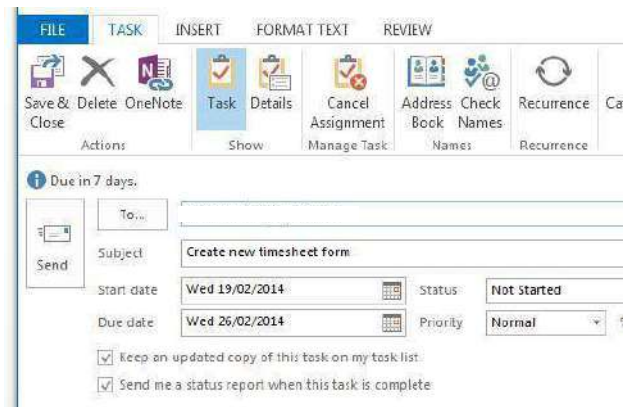
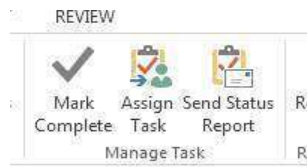
You can now save this task for completion or assign it to someone.



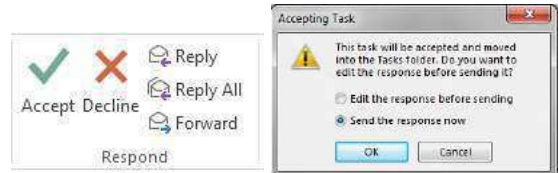
**Exercise 19.**

**Assign the task**

1. Click **Assign Task** in the **Manage Task** group
2. Add a recipient
3. Add any relevant details
4. Click **Send**

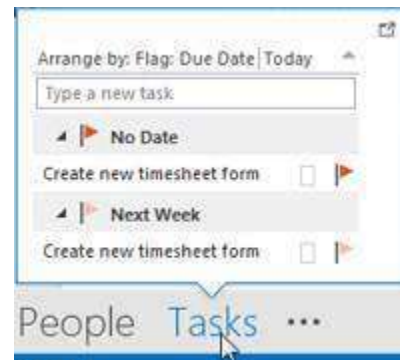


**Completing an assigned task**



In the Mail section when a task assignment arrives:

1. Click **Accept** or **decline** as appropriate.
2. Either send a custom response or simply an automated acceptance or rejection notification
3. Hover on **Tasks** at the bottom to see a quick view of your tasks



4. Go to the **Tasks** section and click the **Tasks** list
5. Double click the **Task** to update it including **% complete**
6. Click **Mark Complete** when the task is completed

