OUTLOOK 2013

Tips & Tricks

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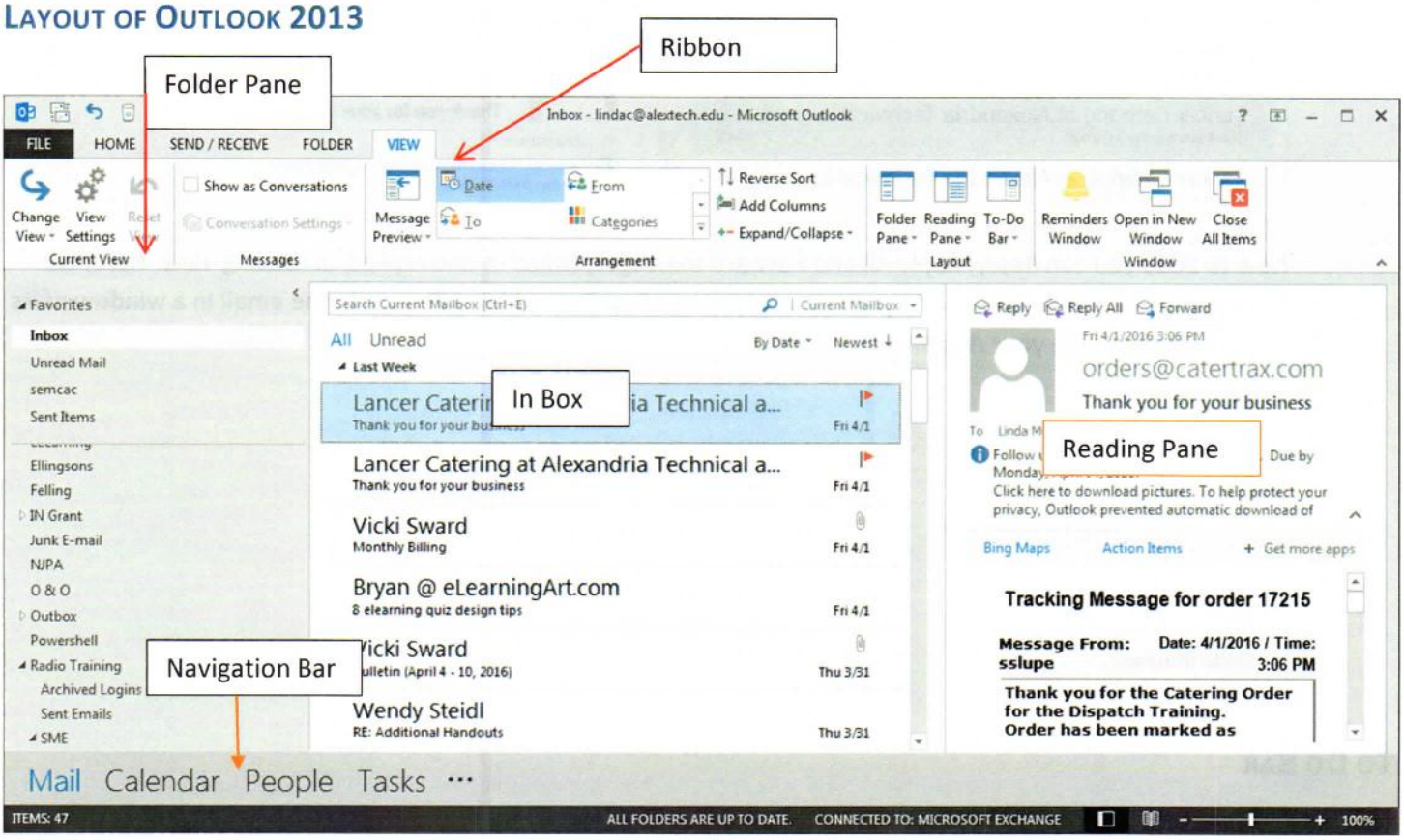
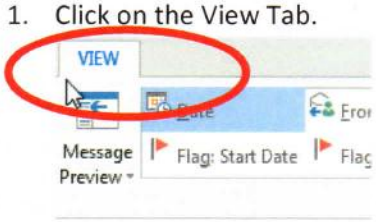
LAYOUT OF OUTLOOK 2013

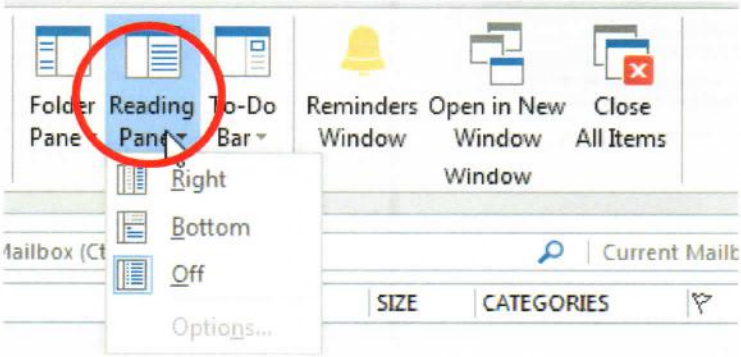


READING PANE

1. Click on the View Tab.

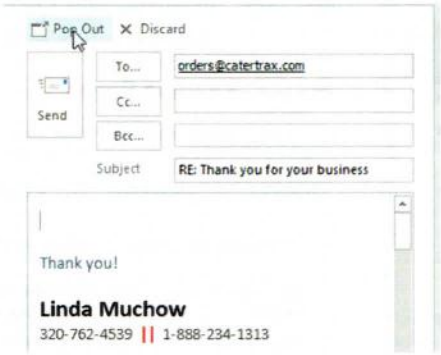


2. Click the **Reading Pane** button that is in the Layout group.



3. Select **Right, Bottom** or **Off.**
   Right will show a reading pane to the right hand side of your email messages.

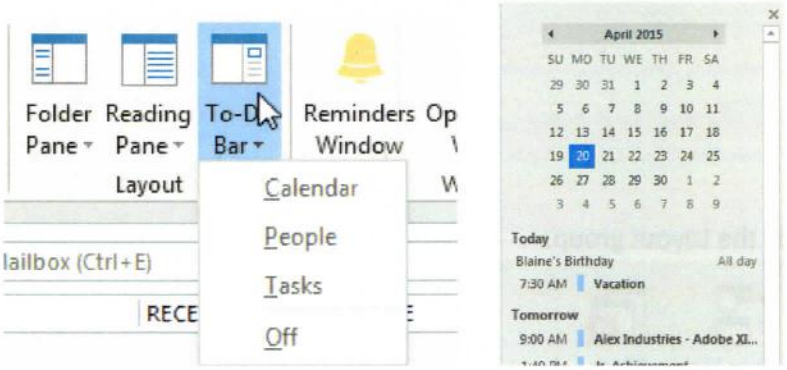
New to 2013 you can Reply, Reply All and Forward messages, called in-line replies, in reading view. Here, we have clicked the Reply button. As you can see, you can Pop Out, which will open in the email in a window of its own, Discard or type your response and Send!



To Do Bar

Use the View menu to turn your To Do Bar on in Outlook 2013.

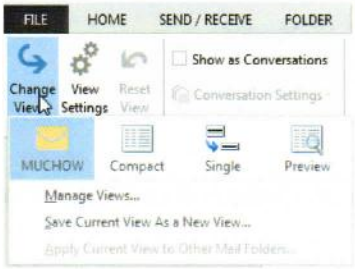
1. Select View Tab, in the Layout group, select To Do Bar. Turn on Calendar, People, and/or Tasks. In this example, Calendar has been selected. You can now double click a date on the calendar to access the calendar from your Inbox and also see all of your upcoming appointments/meetings from the Inbox as well.



Change View

From the View Tab you can change the way your Inbox will display message.

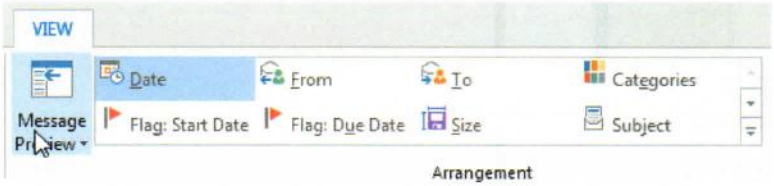
1. Click the View Tab, within the Current View group, select Change View.



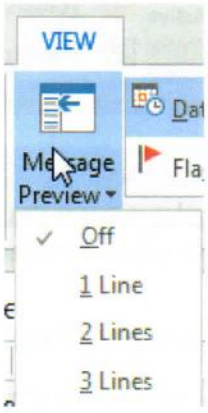
2. You can choose between, Sent To, Compact, Single or Preview.

Arrangement

Use the Arrangement group on the view tab to sort your email messages. This is the same as clicking on the column headings. Select a sort and Inbox message are resorted.



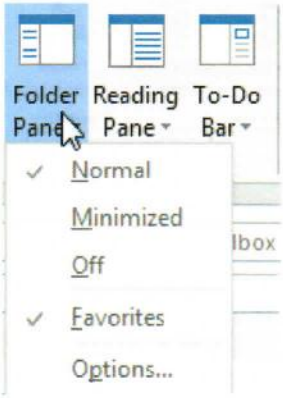
New to Outlook 2013 you can use Message Preview to see the up to three lines of your email message without opening the message.



Folder Pane

On the View tab you can control your Folder pane.

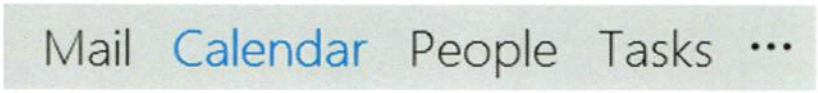
1. Click the View Tab, within the Layout Group, select Folder Pane.



2. You can turn the Favorites folder on / off. And you can also turn the whole Folder pane off if you'd like.

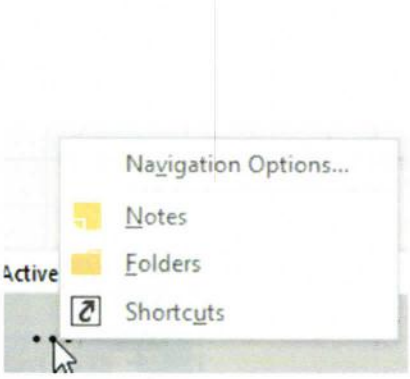
Navigation Bar

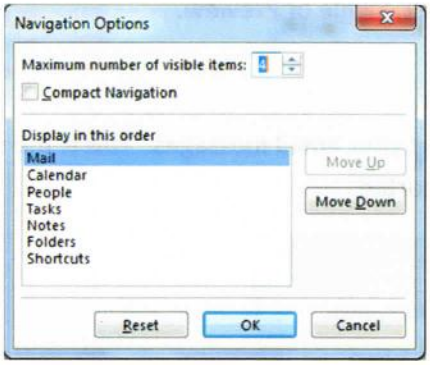
The navigation bar is used to switch between Outlook modules, Mail, Calendar, People, Task, etc. You can change the appearance of the Navigation bar and the number and order of the modules that are being displayed.

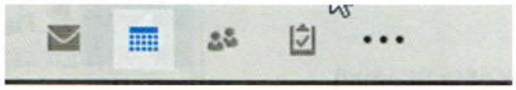


Standard Navigation Bar

Click the ellipsis icon to change the Navigation Options. Here you can move the modules and also show in compact form.





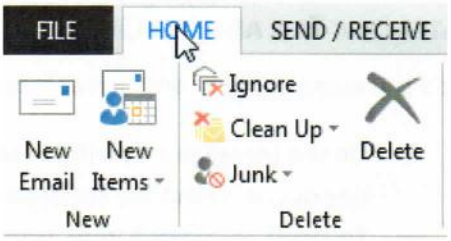


Compact Navigation Bar

Folder Tab

Use the Folder tab to organize folders.

CREATE AN EMAIL MESSAGE

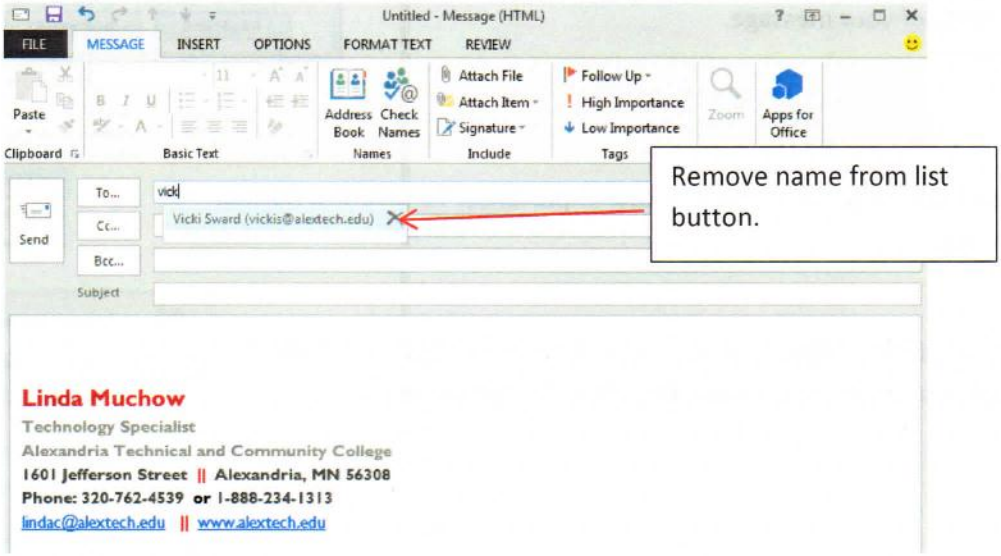


You may compose a new mail message from anywhere in Outlook.

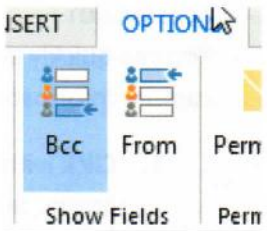
If you are in the Inbox:

1. On the Home tab, click the first button, the **New E-mail** tool. The Mail Composition window opens.
4. or: Press Ctrl + N. The Mail Composition window opens.
2. If you are in another folder in Outlook, such as the Calendar:
3. From the Home tab, click the New Items tool down-arrow. Select **E-Mail Message**.

4. An Untitled-Message appears. In the To, Cc or Bcc text boxes, type the names of addresses. Outlook remembers names you have used before and uses the Auto Complete List feature to complete names as you type them.



   a. To: This address box is for primary message recipients. Usually, these are the people you want to respond to the message
   b. Cc: This address box is for carbon copy recipients. These are usually the people you to keep informed.
   c. Bcc: this address box is for blind carbon copy recipients. These are people you want to keep informed but whom you want to keep hidden from other message recipients.
   NOTE: the Bcc box is not displayed by default. You can display it by selection the Options Tab, within the Show Fields group, click the Bcc option.



5. Type the subject and the message itself. Click Send.

Attach a File and/or Outlook Items

You can attach a file or any Outlook item to an email message.

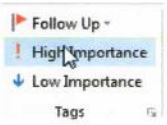
1. On the Message tab, within the Include group, click Attach File. The Insert File dialog box opens. Select the file(s) to insert and click the Insert Button.
2. To insert an outlook item, such as an email message (instead of forwarding) click the Attach Item button. Select the desired element to be included.

Attachment Reminders

Outlook can now warn you when it appears you've forgotten to include an attachment referenced in the body of your message.

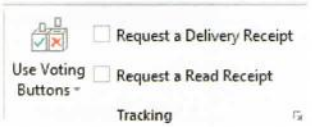
Sending Options

Importance



On the message tab, within the Tags group, select High or Low Importance. To revert to normal importance, click the button again.

Read/Delivery Receipt

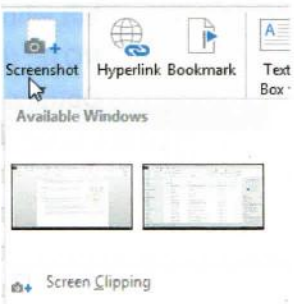


1. From the Options Tab, within the Tracking group, select Request a Delivery Receipt or Request a Read Receipt or Both. Please note, this ONLY for the current email message.

Delay Delivery

1. From the Options Tab, within the More Options group, select Delay Delivery.
2. Change the Do not Deliver Before date and time.
3. Click Close.

Screenshot



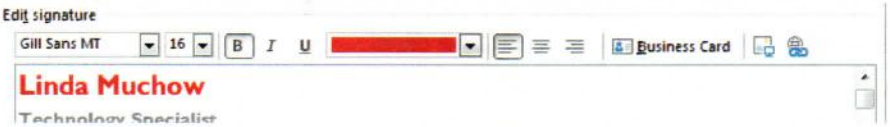
You can quickly and easily add a screenshot to your Office file to enhance the readability or capture information without leaving the program that you are working in.

1. Click within the body of your email message. From Insert Tab, within the Illustrations group, select Screenshot.
2. You can insert the whole program window or use the Screen Clipping tool to select part of a window. Only windows that have not been minimized appear.

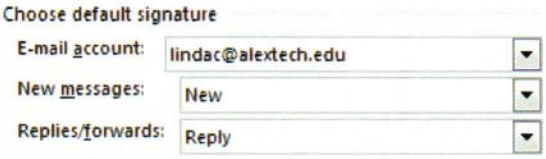
3. When you select a thumbnail from the Available Windows section, a whole window is inserted into the body of your email message.
4. When you select Screen Clipping, when your mouse pointer becomes a hairline cross, press and hold the left mouse button to select the area of your screen you wish to capture. When you release your mouse button, the screen capture is inserted into the body of your email message.

Create a Signature

1. In a new email message, on the Message tab, within the Include group, select Signature >> Signatures...
2. Click the New button. Type a descriptive name for the signature. Click OK.
3. Under the Edit Signature type the information you want to insert at the end of every new message.
   a. Format your text using the formatting section.



4. If you wish to create additional signatures, such as Replies/Forward signature, click Save and repeat step 2 & 3.
5. Under Choose default Signature, select which signatures you want for New Messages and for Replies/Forwards.
6. When done, Click OK.



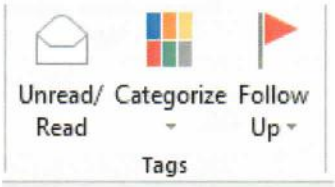
Managing your Messages

Create a Folder

1. On the Folder tab, in the New group, click New Folder.
2. NOTE: When in the Calendar view, the New Folder command is replaced with New Calendar.
3. In the Name box, enter a name for the folder.
4. In the Select where to place the folder list, click the location for the new folder. The new folder will become a sub folder of the folder you select.
5. Click OK.

Flags

You can set or remove reminders for a variety of items, including e-mail messages, appointments, and contacts.



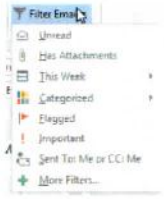
1. On the **Home** tab, in the **Tags** group, click **Follow Up**, and then click **Add Reminder** and/or select a Flag.

Categories

1. From the Home Tab, within the Tags Group, click Categorize >> All Categories.
2. Select a category, click the Rename button and name the category. Click OK when you are done.
3. In any view, on the **Home** tab, in the **Tags** group, click **Categorize**, and then click **Set Quick Click**.

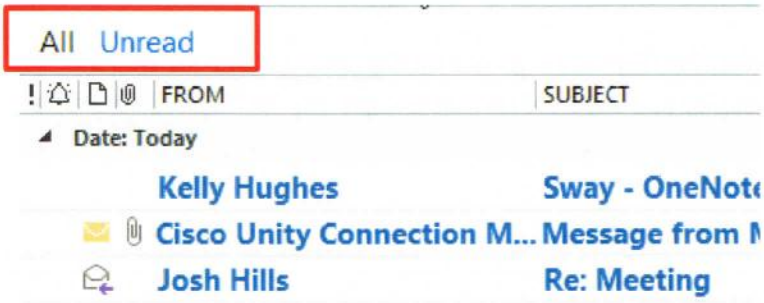
Filtering

When you use a filter, the same **Search Tools** tab appears on the ribbon as when you click in the Instant Search box.



1. On the **Home** tab, in the **Find** group, click **Filter E-mail**.
2. To clear the search results and view all items in the selected mail folder, do one of the following:
3. Next to the Instant Search box, click ×.
4. On the **Search** tab, in the **Close** group, click **Close Search**.

Outlook 2013 has a ALL and UNREAD Email option just above your email messages. See all your unread messages with a single mouse click! Change back to all messages with another mouse click!

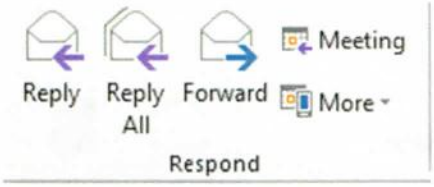


Responding to Message

You can respond to messages that you receive by replying to them or by forwarding them to others.

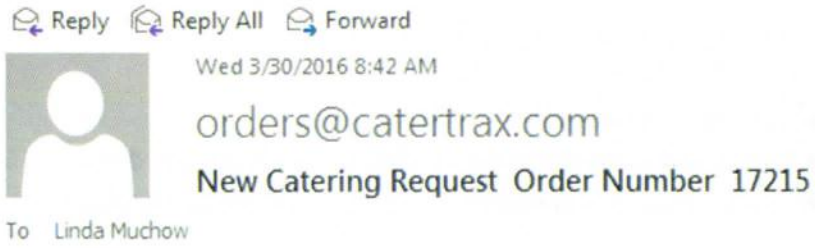
Reply

1. Double click the message you want to reply to. The message opens.
2. On the Message tab >> Respond group >> Reply or Reply All. Outlook creates a new message that is addressed to only the sender of the original message (Reply) or the message sender and all other recipients (Reply All).



OR

3. Use the Reading Pane to Respond.



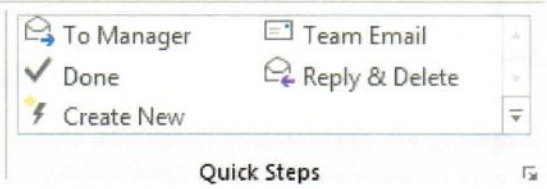
Forward

When you receive a message, you can forward it on to one or more recipients. Forwarded messages include the original message header and content including attachments.

1. In the Content Pane, double click the message you want to forward. The message opens in a window.
2. On the Message tab >> Respond group >> click Forward.
3. In the To, Cc, or Bcc box, type the email address of each recipient. Separate multiple entries with a semicolon (;).
4. In the Message box, click in the space above the original message and compose your message.
5. Click the Send button.

Quick Steps

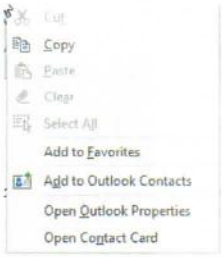
In Outlook 2013, Quick Steps give you the ability to perform multiple actions in one click.



1. In Mail, on the Home tab, in the Quick Steps group, in the Quick Steps gallery, click the Create New Quick Step.
2. Click an action type from the list or click Custom.
3. In the Name box, type a name for the new Quick Step.
4. Click the icon button next to the Name box, click an icon, and then click OK.
5. Under Actions, choose an action that you want the Quick Step to do. Click Add Action for any additional actions.
6. To create a keyboard shortcut, in the Shortcut key box, click the keyboard shortcut that you want to assign.

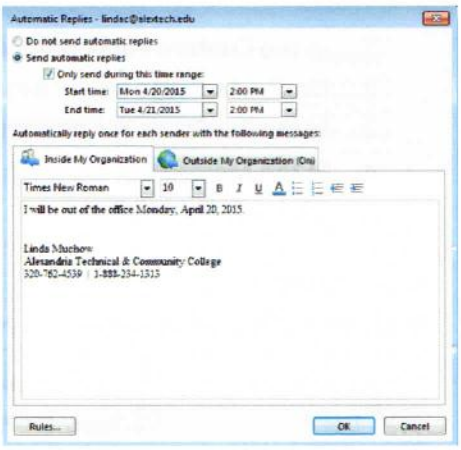
Create a Contact from a Message

1. In an open email message, right mouse click the person's name.
2. Select Add to Outlook Contacts. A contact window opens displaying the person's information. Add any additional information.
3. Click Save and Close.



Automatic Replies (Out of Office)

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



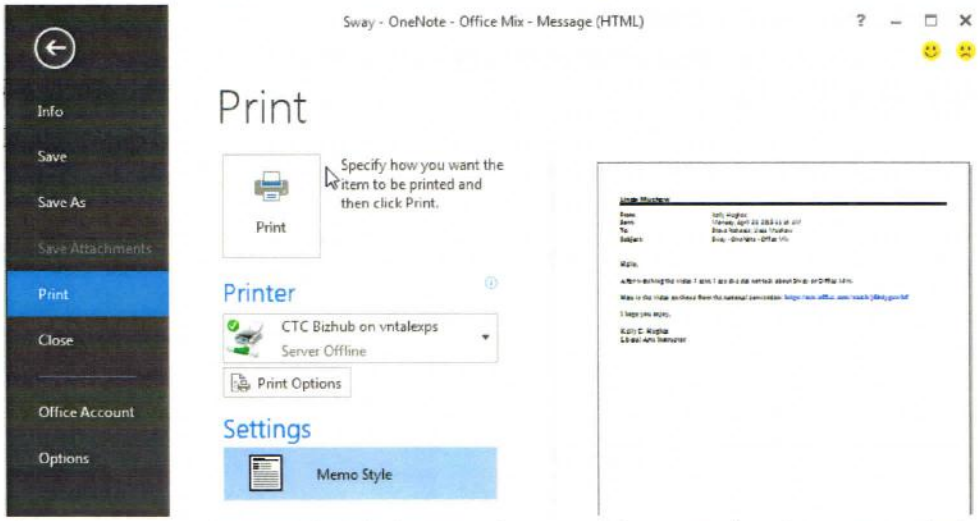
If you don't see this command, you probably don't have an Exchange Server account.

3. Select Send automatic replies.
4. If you want, select the **Only send during this time range** check box to schedule when your out of office replies are active. If you don't specify a start and end time, auto-replies are sent until you select the **Do not send automatic replies** check box.
5. On the **Inside My Organization** tab, type the response that you want to send to teammates or colleagues while you are out of the office.
6. On the **Outside My Organization** tab, select the **Auto-reply to people outside my organization** check box, and then type the response that you want to send while you are out of the office. Select whether you want replies sent to **My contacts only** or to **Anyone outside my organization** who sends you messages.

NOTE: Ctrl + C = Copy Ctrl + V = Paste

Print

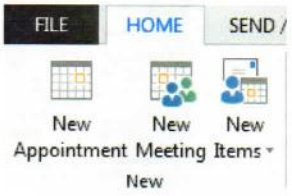
1. To **print** a message, double click the message to open it or simply select the message. Click the **File Tab.**
2. Click **Print** from the menu. This changes what is on the right hand side of your screen. It first shows you the print options and gives you a preview of what how it is going to look when you print the message.



3. If everything "looks good," click the Print button. (I know – a lot of steps to print)

Calendar

Creating an Appointment



1. In **Calendar**, on the **Home** tab, in the **New** group, click **New Appointment**. Alternately, you can right-click a time block in your calendar grid and click **New Appointment**.
2. In the Subject box, type a description.
3. In the Location box, type the location.
4. Enter the start and end times.
5. TIP You can type specific words and phrases in the Start time and End time boxes instead of dates. For example, you can type Today, Tomorrow, New Year's Day, Two Weeks from Tomorrow, Three days before New Year's Day, and most holiday names.
5. To show others your availability during this time, on the Appointment tab, in the Options group, click the Show As box and then click Free, Tentative, Busy or Out of Office.

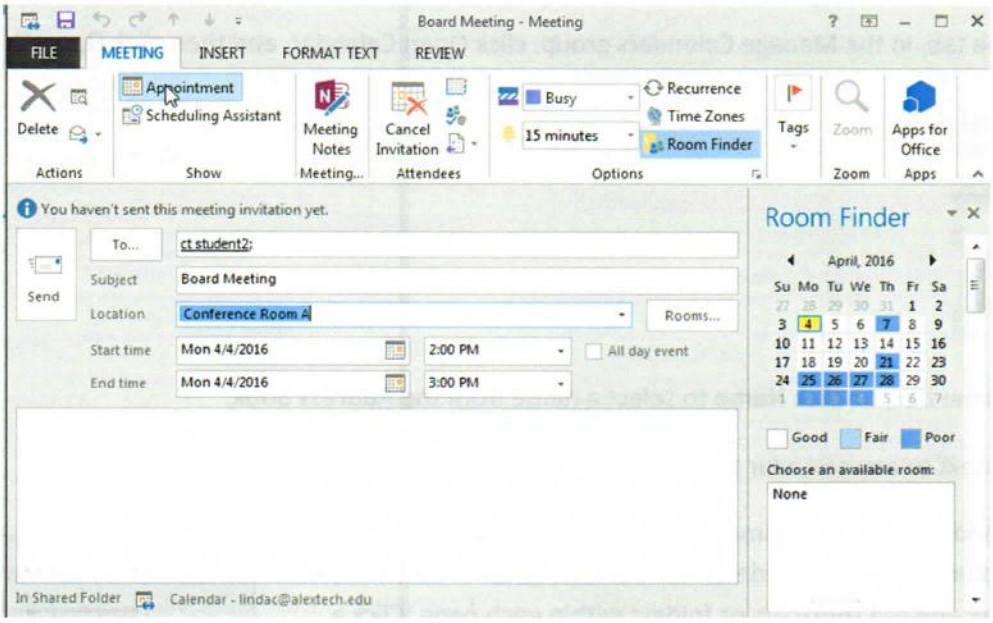
Recurring Appointment

1. To make the appointment recurring, on the **Appointment** tab, in the **Options** group, click **Recurrence**. Click the frequency (**Daily**, **Weekly**, **Monthly**, **Yearly**) with which the appointment recurs, and then select options for the frequency. Click **OK**.

Note Adding a recurrence to an appointment changes the **Appointment** tab to say **Recurring Appointment**.

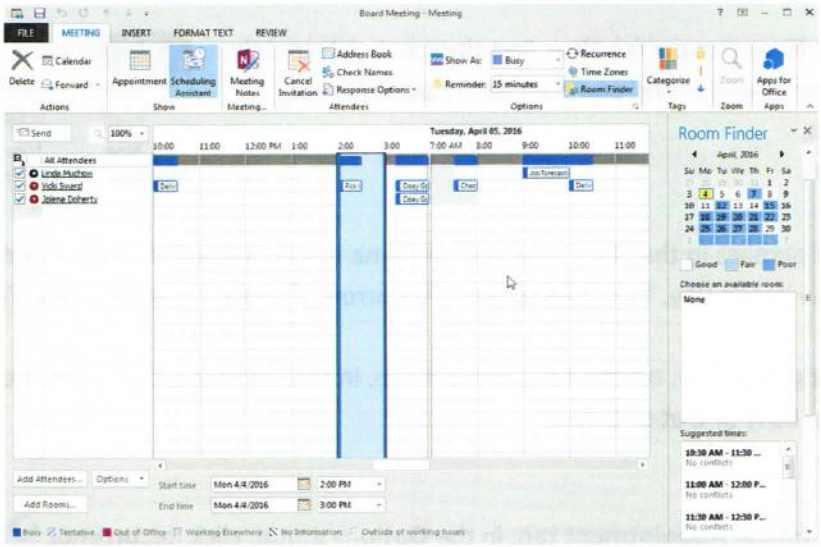
Schedule a Meeting

1. In Calendar, on the **Home** tab, in the **New** group, click **New Meeting**.
2. In the **Subject** box, type a description.
3. In the **Location** box, type a description or location.
4. In the **Start time** and **End time** lists, click the start and end time for the meeting. If you select the **All day event** check box, the event shows as a full 24-hour event, lasting from midnight to midnight.
   Note If you want to schedule meetings based on an alternate time zone, on the **Meeting** tab, in the **Options** group, click **Time Zones**.



5. In the meeting request body, type any information that you want to share with the recipients. You can also attach files.

6. On the **Meeting** tab, in the **Show** group, click **Scheduling Assistant**.
   The **Scheduling Assistant** helps you find the best time for your meeting.



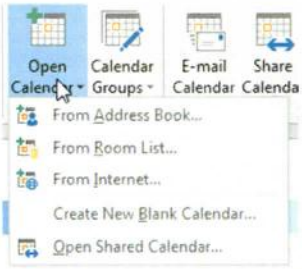
7. Click Add Attendees, and then click Add from Address Book.
8. In the **Select Attendees and Resources** dialog box, in the **Search** box, enter the name of a person or resource to include at the meeting.
9. Click the name from the results list, then click **Required**, **Optional**, or **Resources**, and then click **OK**.

Change a Meeting / Appointment

1. Open the appointment or meeting. If you open an item that is part of a recurring series, in the **Open Recurring Item** dialog box, click **Open this occurrence**, and then click **OK**.
2. On the ***Item* Occurrence** tab, change the options that you want, and then click **Save & Close** or for a meeting, click **Send Update**.

Open Shared Calendar

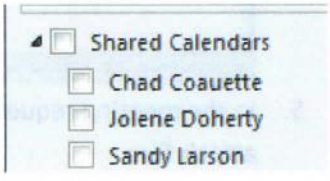
1. Calendar, on the Home tab, in the Manage Calendars group, click Open Calendar, and then click Open Shared Calendar.



2. Type a name in the **Name** box, or click **Name** to select a name from the Address Book.

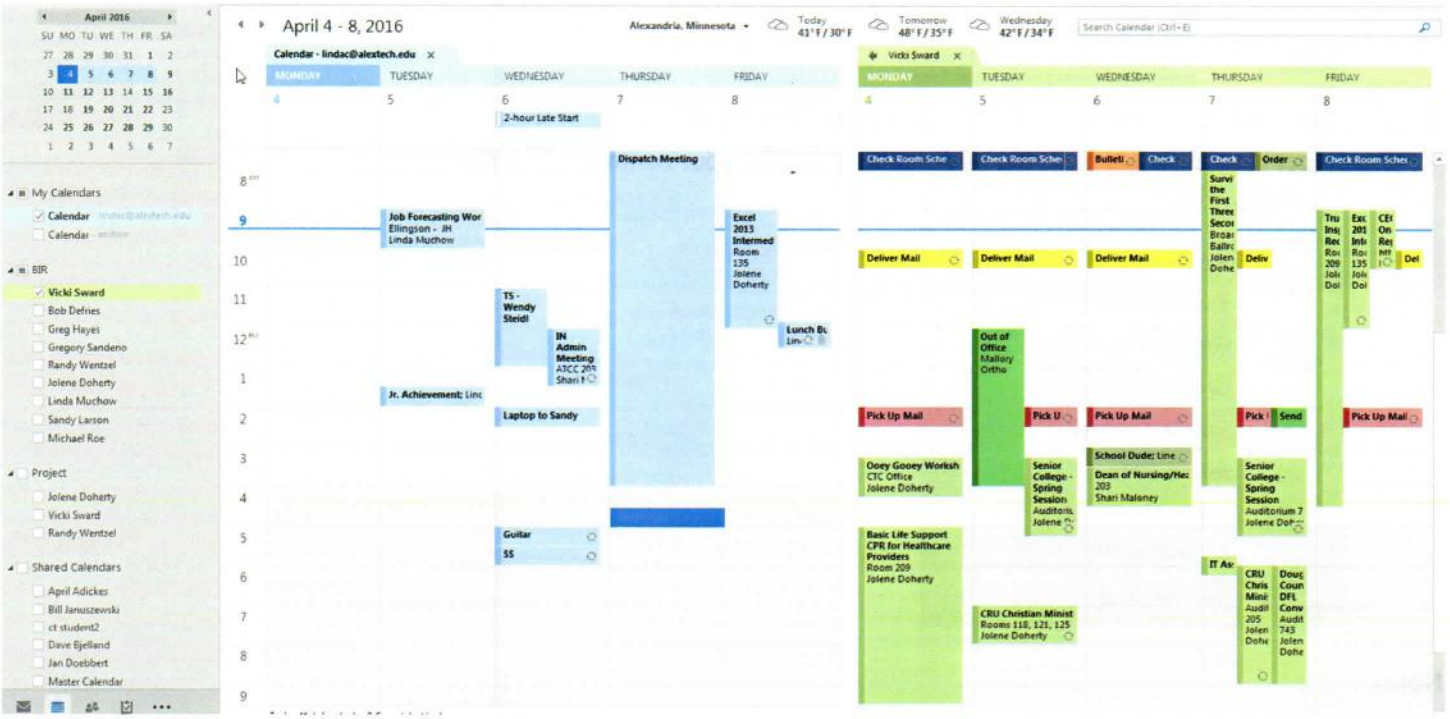
The shared Calendar appears next to any calendar that is already in the view.

After you access a shared Calendar for the first time, the Calendar is added to the Folder Pane (Navigation Pane: The column on the left side of the Outlook window that includes panes such as Shortcuts or Mail and the shortcuts or folders within each pane. Click a



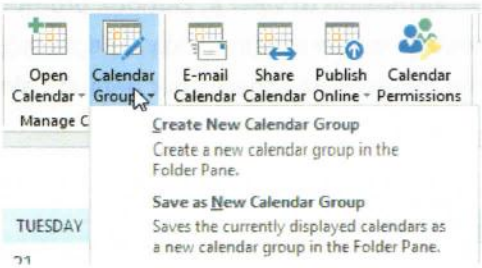
folder to show the items in the folder.). The next time that you want to view the shared Calendar, you can click it in the Folder Pane.

If the other person whose Calendar you want to open has not granted you permission to view it, Outlook prompts you to ask the person for permission. If you click **Yes**, a sharing request e-mail message opens automatically. The message requests the person to share his or her Calendar with you and also provides the option to share your default Calendar with him or her.

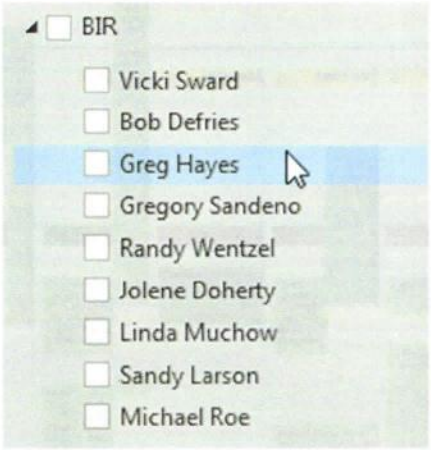


Create a New Calendar Group

1. In Calendar, on the Home tab, in the Manage Calendars group, click Calendar Groups, and then click Create New Calendar Group.



2. Type a name for the new calendar group, and then click **OK**.
3. Select the Calendars from the address book and/or your contacts. Click Ok.



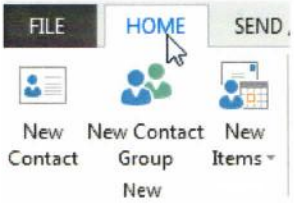
Notes

- The new calendar group opens beside any calendars or groups that were already open.

Contacts

Contact in 2013 are called People!

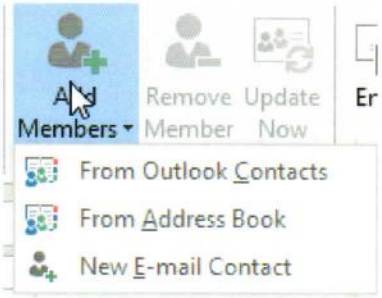
Create a Contact



1. In **Contacts**, on the **Home** tab, in the **New** group, click **New Contact**.
2. Enter a name and any other information that you want to include for the contact.
3. Do one of the following:
   - To finish entering contacts On the **Contact** tab, in the **Actions** group, click **Save & Close**.
   - To save this contact and start another Click **Save & New**.
   - To save and enter another contact from the same company or address Click the down arrow next to **Save & New**, and then click **Contact from the Same Company**.

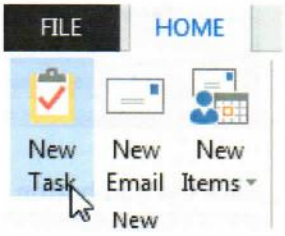
Create Contact Group

1. Click New Contact Group on the Home tab.
2. Give the Contact Group a name and then click Add Members to begin picking from your Contacts folder or another address book.



Tasks

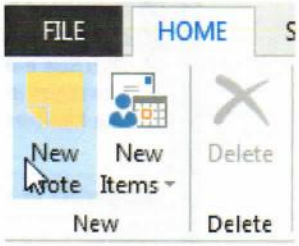
Create a Task



1. In **Tasks**, on the **Home** tab, in the **New** group, click **New Task**.
2. In the **Subject** box, type a name for the task. You can add more detail in the task body.
3. On the **Task** tab, in the **Actions** group, click **Save & Close**.

Notes

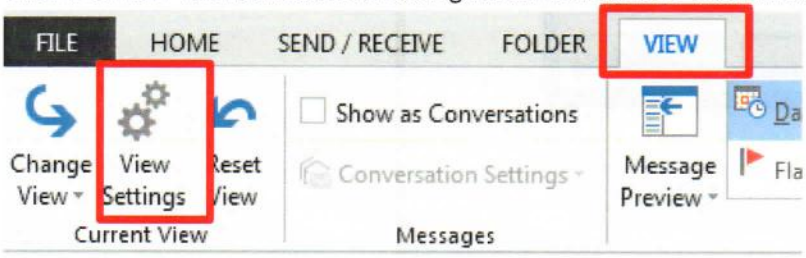
Create a New Note

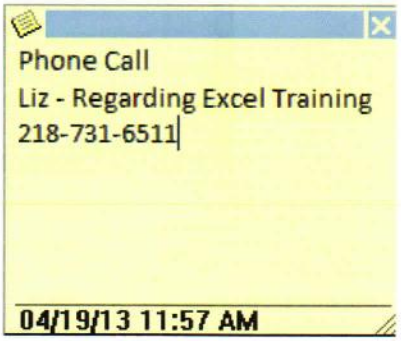


1. In **Notes**, on the **Home** tab, in the **New** group, click **New Note**.
2. Type the text of the note. The note saves automatically.
3. To close the note, click the note icon in the upper-left corner of the note window, and then click **Close**.

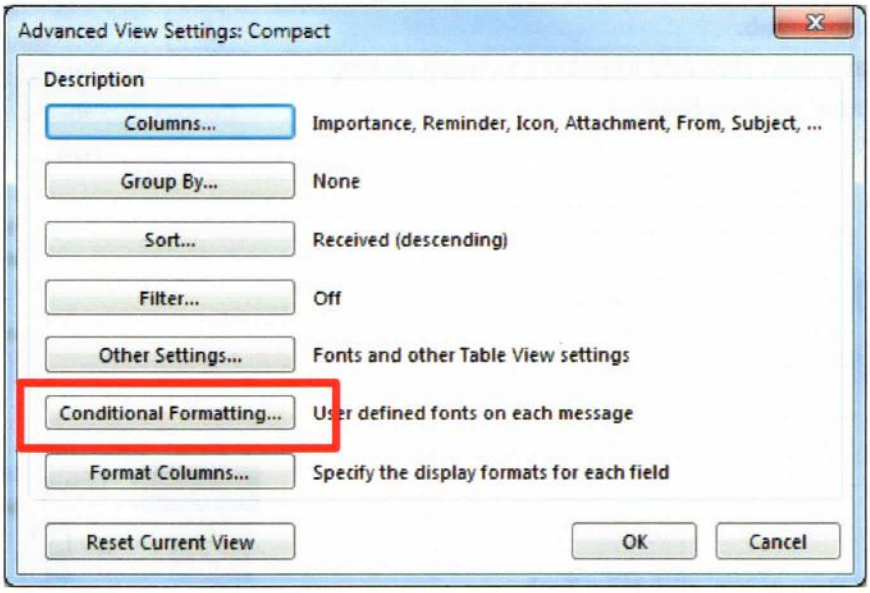
Change the Font Size of All Messages in Outlook 2013

1. Click the View Tab. Select View Settings from the Current View Group.

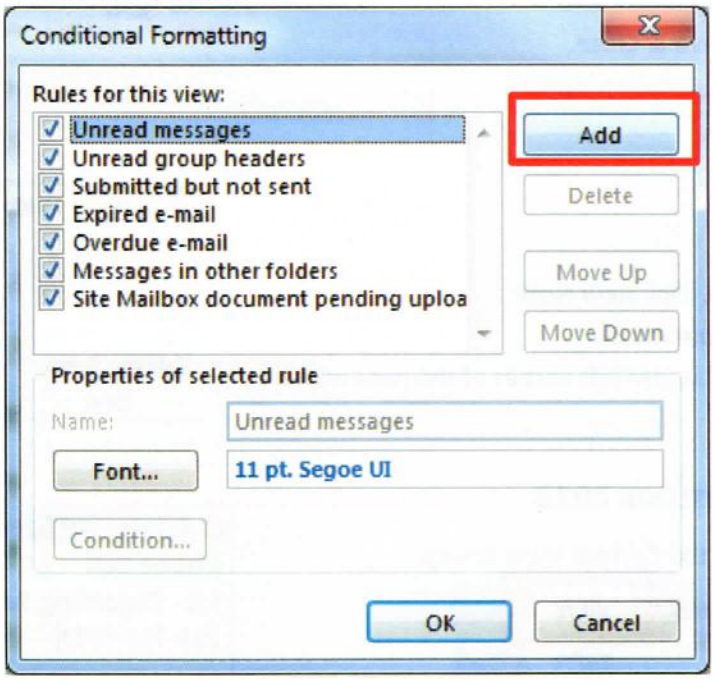




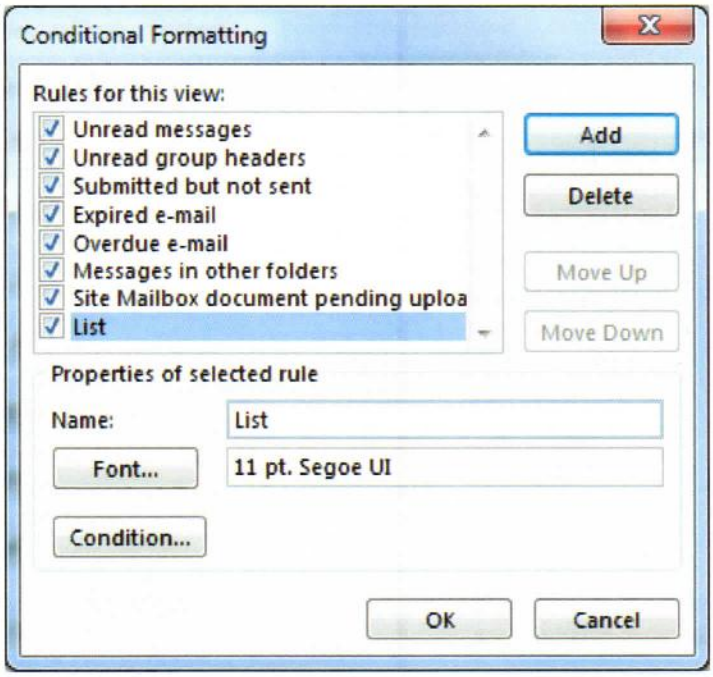
2. Click the Conditional Formatting... button.



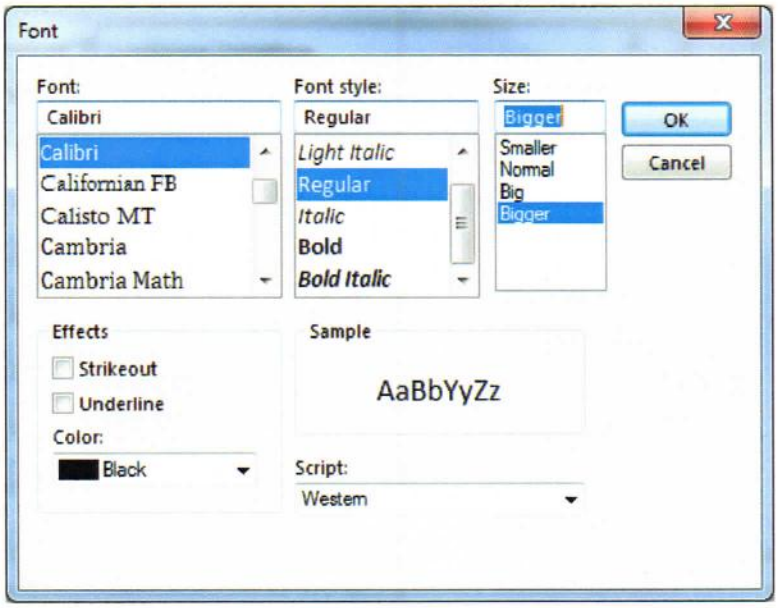
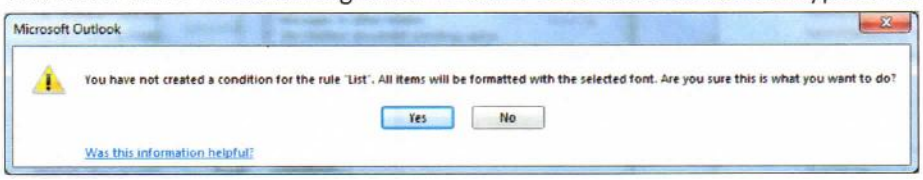
3. Click the Add button.



4. Name the item List or Font Size or whatever makes sense to you.



5. Click the Font Button. Select the font type you would like and the size and the color. Click OK twice.



6. You will receive the following Error. This will reformat the size and type of font for everything. Click YES. Click OK