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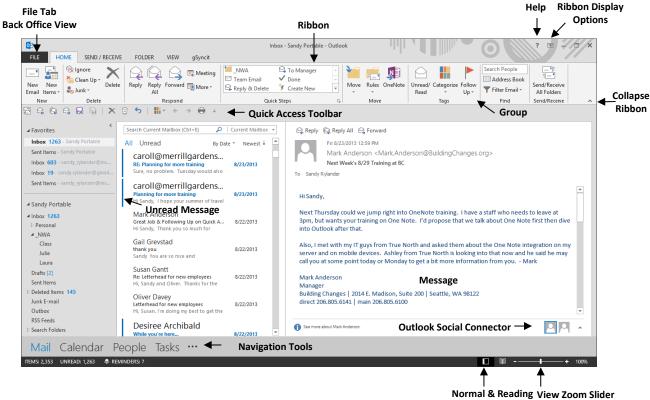
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## New Sleek Look - Identifying Screen Elements

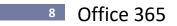
Outlook 2013 looks similar to Outlook 2010 but the tabs, ribbons and groups have a sleek new look. The Ribbon can still be customized so you can put your favorite tools on the Home tab or create new tabs. The Quick Access toolbar (QAT) continues to be a great productivity tool because it is always visible and it can hold your most frequently used commands. The File Tab takes the place of the File menu and has all the old commands (i.e. New, Open, Save, Save As, Print etc.) as well as many new ones (i.e. Account Settings, Mailbox Cleanup, Rules and Alerts. Some of the old dialog boxes remain and can be accessed using the Dialog box launchers that appear in the lower right corner of a group. Another great feature is the View Zoom Slider in the bottom right corner of the screen. The Zoom Slider allows you to quickly change the magnification of the zoom. There is also a view called Reading View in addition to the Normal view. These views can be changed using the view tools to the left of the slider. Reading view hides or minimizes the Ribbon and the other panes so that you have more room to read the content of messages. Outlook 2013 is much more intuitive than all previous versions of Outlook.



Normal & Reading View Zoom Slide View Tools

#### The Ribbon with Tabs

The Ribbon is a series of tabs displaying tools for the most used functions. When you select a tab, the toolbar changes to reflect commands related to the tab. Tools on a tab are divided into groups, with the group name appearing below the group. Some groups have a little arrow in the bottom right corner called the Dialog Box Launch icon. The Dialog Box Launch icon sometimes launches a dialog box and other times it causes a task pane to appear. For instance, the Dialog Box Launch for the Font group will launch the Font dialog box where the Dialog Launch for Styles will open the task pane on the right side of the screen and display a list of Styles.



#### **Tool Appearance**

The appearance of tools change as the size of your Outlook window changes. The sizes and shapes of buttons change and could even collapse into menu options if the window gets small enough (see the Tags group below). If your toolbars look a bit different from the ones displayed in this book, try maximizing your window to see the complete ribbon.

FILE HOME	SEND / RECE	EIVE FOLDER	VIEW gS	yncit		
New New Email Items • New	- Delete	Reply Reply All Forward Respond	LNWA To Manager Team Email Quick Steps	▲ Move ▼     ■ Move ▼     ■ Rules ▼     ■ OneNote     ■ Move	Search People Address Book Filter Email •	Send/Receive All Folders Send/Receive

Sample of Groups Collapsing as Window Gets Smaller

#### Exercise:

Select different tabs to view where commands have been placed.

#### **Contextual Tabs**

Tabs like Home, Send/Receive and Folder are always visible in Mail view, but other tabs, called contextual tabs are only displayed when needed. The Table Tools tab group is only displayed if you are in the body of an email and working in a table. Notice the Table Tools tab group consists of 2 tabs: Design and Layout. These tabs appear when the insertion point is in a table and disappear when it moves back out. Another contextual tab is the Picture Tools Tab.

Table Design Tab		↓				
E* Ur	ntitled - Message (HTML)	TABLE TO	OLS	111 × 111		
FILE MESSAGE INSERT	OPTIONS FORMAT TEXT REV	/IEW gSyncit DESIGN	LAYOUT	i de la pre-		
<ul> <li>✓ Header Row</li> <li>✓ First Column</li> <li>Total Row</li> <li>✓ Last Column</li> <li>✓ Banded Rows</li> <li>✓ Banded Columns</li> </ul>				Border Styles - Pen Color - Painter		
Table Style Options		Table Styles		Borders 🕞		
Table Layout Tab	Table Layout Tab					
Untitled - Me	essage (HTML)	TABLE TOOLS	1 I I I I I I I I I I I I I I I I I I I	? 🖬 🚽		
FILE MESSAGE INSERT OPTIONS	FORMAT TEXT REVIEW gSyncit	DESIGN LAYOUT				
Select View Properties Gridlines Table Del	ete Insert Insert Insert Merge	Split Split Cells Table		$\begin{array}{c c} A \implies & & & \\ \hline \\ A \implies & & \\ \hline \\ Text & Cell \\ Direction Margins \\ \end{array} \begin{array}{c c} A \downarrow & \hline \\ A \downarrow & \hline \\ Convert to Text \\ \hline \\ Sort \\ f_X \ Formula \\ \end{array} \begin{array}{c} Convert to Text \\ \hline \\ f_X \ Formula \\ \end{array}$		
Table Draw	Rows & Columns 🕞 🛛 🕅	derge Cell	Size 🖓 A	lignment Data		

#### The Quick Access Toolbar

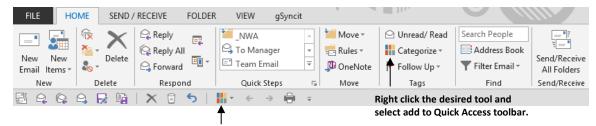
The Quick Access toolbar is always visible and therefore an excellent toolbar for your most used commands. While the Ribbon changes according to the selected Tab, the Quick Access toolbar stays the same.

#### **Customize the Quick Access Toolbar**

The Quick Access toolbar can be customized very easily. Simply right click on any tool and select Add to Quick Access Toolbar. You can also right click on any tool and select Customize Quick Access toolbar to see all customization options.

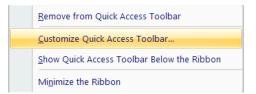
Exercise:

Add the Categorize tool to the Quick Access toolbar.



Categorize Tool

- 1. Select the Home tab.
- 2. Right click the Categorize tool.
- 3. Select Add to Quick Access Toolbar. The tool is added to the end of the toolbar. Later you will learn how to move the tool.
- Remove the Categorize Tool from the Quick Access toolbar.
  - 1. Right click the Categorize tool on the Quick Access toolbar and select Remove from Quick Access Toolbar.
- Add the Print, Quick Print, and Print Selected Attachment tools.
  - 1. Right click the Quick Access toolbar and select Customize Quick Access Toolbar.



## <sup>10</sup> Office 365

2. The following dialog box appears. The commands on the left are the ones that can be added to the toolbar and the commands on the right are the ones that are already on the toolbar.

	Outlook Op	Options	? ×
Mail Choose co	istomize the Quick Access Toolbar.	Change from Popular Commands to All Co	
Tasks       Image         Search       Image         Language       Image         Advanced       Image         Quick Access Toolbar       Peop         Add-Ins       Image         Trust Center       Image         Image       Image	e Setup te te te te special ple Pane in Text t Reply ferences view this calendar view this contact list view this contact list view this discussion list view this laternet Calendar view this laternet Calendar view this laternet Calendar view this task list vious Appointment at t Options t Preview at Selected Attachment vacy Options vate cess Marked Headers v Quick Access Toolbar below the	add the Print and Print Selected Attachmee         Customize Quick Access Toolbar: ①         Send/Receive All Folders         Reply         Reply All         Forward         Print Selected Attachment         Save As         Save All Attachments         < Separator>         Undo         < Separator>         Categorize         Back         Forward         Print         Modify         Customizations:         Reset ▼ ①         Import/Export ▼ ③	
		ОК	Cancel

- To add the Print and Print Selected Attachment tools, double click each tool in the left column or click on it once and then click Add. These commands are alphabetical so you will have to scroll down the list on the left to find them.
- Add the tools shown in the Quick Access Toolbar dialog box and move to the order shown above using the arrow keys.
  - 1. Select the Command desired and click the Up or Down arrows to move.
  - 2. Add a separator by double clicking Separator at the top of any of the command lists. Move it above Undo using the Up arrow. Click **OK**.

Customize th	e Quick Access T	oolbar.
Choose commands	from: 🕕	
All Commands		~
<separator> <ul> <li>10 Minutes</li> <li>15 Minutes</li> <li>30 Minutes</li> </ul></separator>	<separator></separator>	^

**Tip!** To add a command below another command on the Quick Access toolbar, click on the tool below which you want the new tool to appear and then double click on the tool you wish to add.

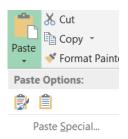
#### **Screen Tips & Ribbon Display Options**

Screen tips display very informative descriptions and shortcut keys (i.e. Ctrl + V for Paste). Ribbon Display Options show three ways of viewing the ribbon. See example below:



#### Split Tools

Notice that the paste tool looks split in two as you point to it with your mouse. The top part of the tool performs the most frequently desired action i.e. Paste, while the bottom of the tool displays additional options.



#### View Zoom Slider on the Status Bar

Either drag the slider or click on the Minus or Plus icon to Zoom in or out.

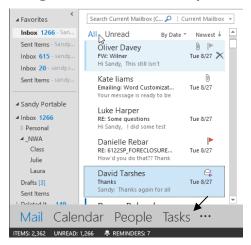


#### Help

Help is accessed through the question mark in the top right corner of the Title bar at the top of the Outlook screen.



#### Navigation Tools for Primary Folders at Bottom of Screen - New in 2013

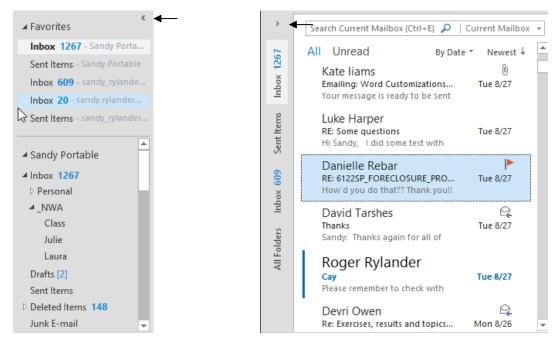


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#### **Minimize the Navigation Pane**

By minimizing the Navigation Pane, you can better use your display. Minimize and restore the Navigation pane by clicking the arrow in the top right corner of the pane.



Navigation Pane Displayed

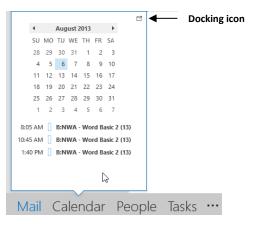
**Navigation Pane Minimized** 

#### **Sneak a Peek**

Quickly glance at other views like calendar, tasks and people view without having to go to that folder. Simply hover over the navigation icons at the bottom of the Outlook screen. Click the docking icon in the upper right corner of the Sneak to dock it to the right of a view and click the X to remove it from a view.

#### Calendar

Sneak a Peek shows today's appointments by default, but you can use the calendar navigator to view any other day simply by clicking the desired date.



Task

The task Sneak a Peek allows you to see existing tasks and type in new ones.

			Ľ,
Arrange by: Flag: Due Date	Today		5
Type a new task	Dock t	he pee	k
🔺 🕨 No Date			
Alex Flu Reimbursement	2		
Joe@IBM 4254573242 r	2		
Reservations for next Ye	2		
Beneficiary Info	2		
S&B-Training Program C	2		
Pleading fixes with Joan	2		
🔺 🕨 Today			
Update Word Add-In Temp	la 📘		
Deeple Teele			
People Tasks	•••		

#### Contacts

Contacts Sneak a Peek displays your Favorites and allows you to search for other contacts.

Search People FAVORITES	Shelley R	ose
Shelle	Copy <u>R</u> emove from Favorites	://static.wellsfargo.cc argo Online o Online Stateme
	Edit Contact	atic.wellsfargo.co
	n	<b>gust Schedule - I hav</b> dy, The open class ( lay, August 8th has b
	a	Iton@comcast. ring for my mom. e to help with all of t Sandy. Just let me ky
lendar F	eople Tasks ·	

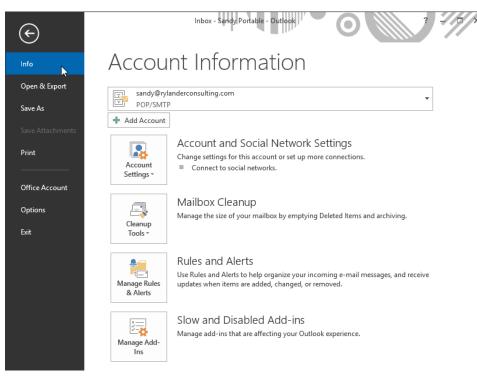


#### The File Tab - Backstage View

The File menu is where you will find frequently used commands like: Open, Save Attachments, Save As, Print etc. as well as a new Info option that allows you to change Account Settings, do Mailbox Cleanup and set Rules and Alerts, set Options and set Out-of-Office. Everything is organized in a way that is easy to find.

#### File, Info

This is the first screen that appears when selecting the File Tab. Here you can Change Account Settings, perform Mailbox cleanup and mange Rules and Alerts and setup Automatic Replies (Out-of-Office).



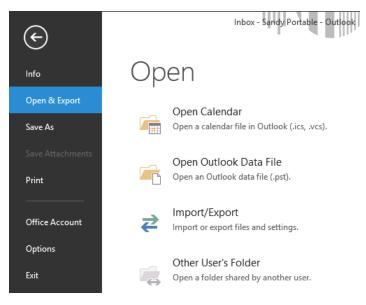
#### Automatic Replies (Out of Office)

This option would appear on the File Info tab if this account was set up to work with Exchange. Here are the screens you would see with an Exchange account. You can set dates and times for the Automatic Replies to start and end. You can have 2 messages: Inside and Outside your Organization.



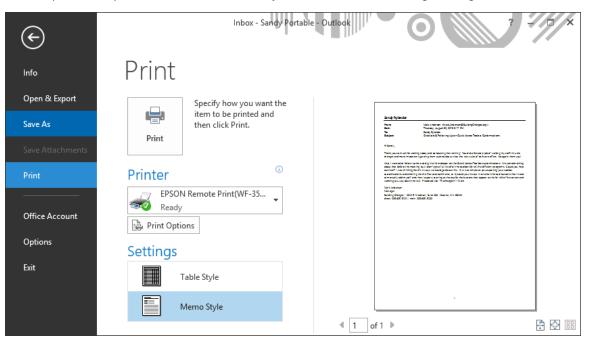
#### File, Open and Export

Open other calendars, open an Outlook Data File, Import or export data and open another User's folder.



#### File, Print

Shows a preview of your document and allows adjustments to Printer and Page settings.



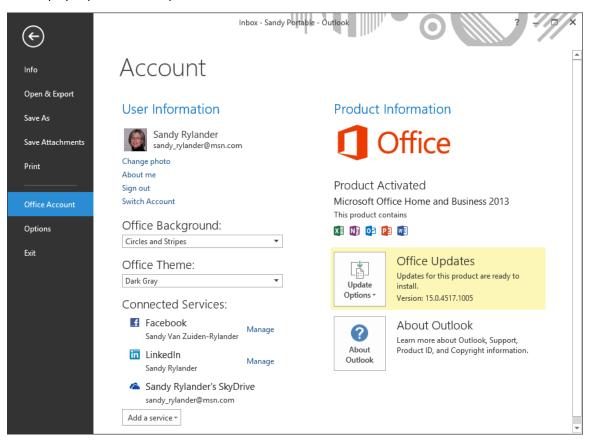


#### File, Save and File, Save Attachments

File, Save allows you to save one attachment at a time and File, Save Attachments allows you to save all attachments at once.

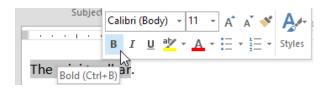
#### **File, Office Account**

Displays Accounts and User Information and allows you to edit, add or remove information or accounts. Also displays Updates and Help



#### The Mini Toolbar

The Mini toolbar allows you to quickly format selected text by appearing right next to the text as shown below. When you select text the Mini Toolbar will appear faintly. As you move your mouse closer to the toolbar it gets more pronounced.



#### **Exercise:**

- Use the Mini Toolbar to Underline the words "The Mini Toolbar"
  - 1. Type "The Mini Toolbar allows you to quickly format".
  - 2. Select the words "Mini Toolbar" and watch the Mini Toolbar appear. Bold the selected words by clicking the "B" (bold) tool.

#### **Galleries and Dialog Boxes**

Shape Styles Gallery on the Drawing Tools Format tab

There are many Galleries in Outlook 2013: Headers, Footers, Styles, Tables, etc. Galleries are collections of presets that can be applied. You can even create your own presets at times. For example, you can add a Header preset or edit or remove one of the existing presets.

Some dialog boxes are still available in Outlook 2013. Dialog boxes can be accessed using the Dialog Launch arrows at the bottom right of some groups on the ribbon and they can be accessed through some menu items that have "More" or "Custom" as an option. For example, the Columns menu has More Columns at the bottom. Selecting More Columns will make the Columns dialog box appear.

	Click to move up or down a row at a time in the gallery.		
Table Styles	Click the "More" tool to		
Dialog Boxes accessed using the Dialog Box launcher or certain	Select an item by clicking it.		
Dialog Box Launcher Calibri (Boc $\cdot$ 11 $\cdot$ A $\cdot$ A $\cdot$   $\vdots$ $\cdot$ $\vdots$ $\cdot$   $\diamond$ B I $\underline{U}$   $\underline{a}$ $\cdot$ A $\cdot$   $\equiv$ $\equiv$ $\equiv$   $\overleftarrow{e}$ $\overleftarrow{e}$			
Basic Text			

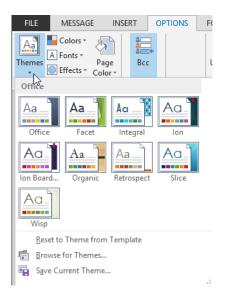
## Exercise:

- Launch some dialog boxes using the Dialog Box launcher and menus.
  - 1. Click the Font Dialog Box launcher on the Message tab of a new email. Make sure you are in the body of the email or the dialog box will be disabled.

#### **Formatting Themes**

Themes are similar to styles, but they apply to an entire email. **Themes include theme fonts, theme colors and theme effects**. If you format text or graphics manually they will not change as the theme changes, but if you leave the formatting set to automatic they will take on the appearance of new themes as the theme changes.

To see what themes can do, create a new email with text and select **Options, Themes**. As you point to various themes you can watch the entire look of the email change with Live Preview. Notice there are three tools to the right of the Themes tool. From top to bottom they are: Theme Colors, Theme Fonts, and Theme effects. You can change a Theme which would include all three or select them individually using these tools.





#### **Theme Colors vs. Standard Colors**

**Theme Colors:** If you select a theme color, it is a placeholder color that changes as you change themes. If you select a Standard Color, it will not change as Themes change.

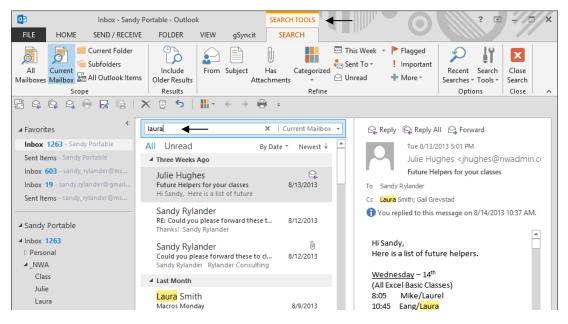
#### **Theme Fonts**

**Theme Fonts:** Are a combination of 2 fonts: a Heading Font and a Body Font. Applying a font with (Headings) or (Body) after the font name will apply a font that will change when the Theme changes, otherwise the font will stay the same. See examples to the right.



#### **Instant Search using the Search Tab**

Outlook 2013 has a very fast new way to find information no matter which folder you are in. It highlights every found instance of the item in yellow and it displays each individual result of your search immediately. There is also a great context Search tools Search tab that appears when you click in the search box. This tab helps you narrow and expand the scope of your search to find items in seconds!

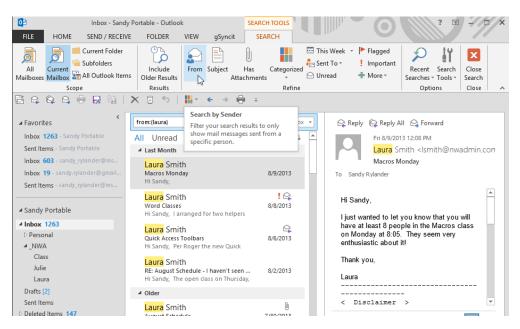


Narrowing the Scope of the Search

Reduce the time it takes to find an item using the Search tab options.

For Example, in the search above I found 138 items that included "Laura". They were either items I sent to her, items she sent to me, or items just mentioning her name. By selecting the From tool first and then typing Laura, I reduced the number of email to 78. I then selected the Subject tool and added the word "Signature" which reduced the number of email to one! Much faster than I could have skimmed 138 email.

1. Click in the Search box, click the **From** tool and type a name of someone who sent you an email.





2. Click back in the Search box after from(laura), click the **Subject** tool and type signature (or some other subject that you know the sender used) in an email sent to you. Notice how quickly you find the message you need.

Po	ortable - Outlool	SEARCH	H TOOLS						
Е	FOLDER	VIEW	gSyncit	SEA	RCH				
s	Include Older Results Results			Has achments	Categorized • Refine				
	★     5     ↓     ↓     ←     →     ⊕     ↓       from:(laura) subject:(signature)     ×     ↓     Current Mailbox								
A	All Unread By Date * Newest 4								
	Laura Smith Automatic <mark>Signature</mark> Block for Outlo 5/24/2013 Good Morning Sandy, As we								

Note: These same techniques are available for Contacts, Tasks and Calendar as well.

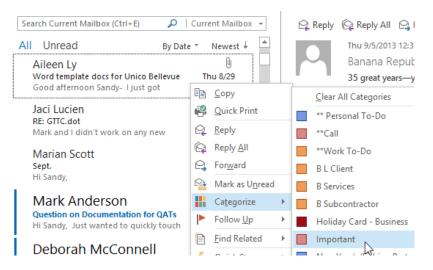
#### **Expanding the Scope of the Search**

Often the item you need to find is in a different folder. Rather than having to search each folder, select **Subfolders** or **All Mailboxes** to increase the Scope of your search.



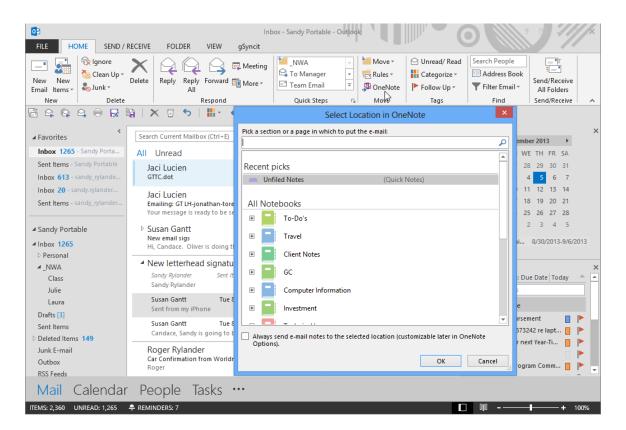
#### **Color Categories**

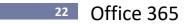
You can add colors to all your Categories to make visual grouping of items better. In addition, these color categories will roam with you if you change computers. You can quickly categorize email by right clicking the email and selecting a category, or selecting an email and then clicking Home, Category on the ribbon. Categories can be applied to all Outlook items: Contacts, Tasks, Email, Calendar and Notes.



#### **One Note Integration**

One Note has been integrated with the entire office suite. OneNote Contact, Task and Calendar items can be linked to OneNote and can be sent to OneNote.





### **Email**

Outlook email has many great features to help you view, create, send, save and print. Here are some of the most significant tools:

#### **Messages View**

- New Display of Read/Unread New in 2013
- Filter View Unread Messages etc. New in 2013
- Preview Messages New in 2013
- Conversations View, Clean-up, Ignore
- Docking Sneak a Peeks New in 2013
- Attachment Preview
- Save/Print all Attachments
- People Pane
- AutoCreate Contacts, Appointments, Tasks from Email
- Create Folders and Arrange Folders in any Order
- Create Task from Email
- In-Line Replies New in 2013

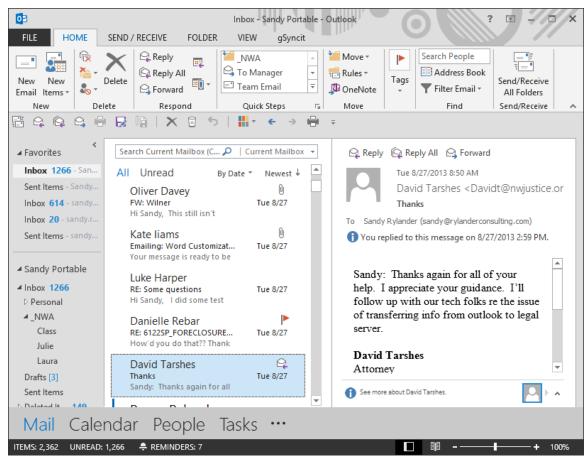
#### Create/Send Message a Message

- Spell Check Subject Line
- Contextual Spelling
- Auto-Complete Improvements
- Reply/Reply All Improved
- Forgotten Subjects
- Attachment Reminders
- Email Etiquette

#### Other Tools

- QuickParts
- Automatic Replies (Out of Office)
- Manage Mailbox Size
- Quick Steps

#### **Messages View**

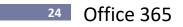


#### New Display of Read/Unread - New in 2013

All unread messages have a thin blue line on the left side of the message. Hovering the mouse pointer over the line makes it wider. Clicking the narrow blue line of an unread message marks it as read while clicking the broad blue line on a read message returns it to unread. Unread emails are easier to see with their bold blue Subject lines.

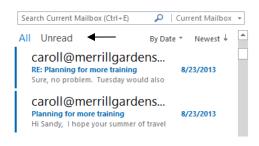


**,** 



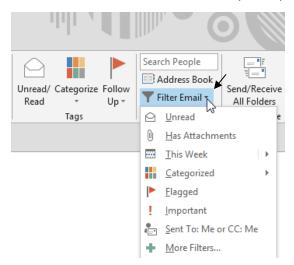
View All or View Unread Buttons above the Messages Window - New in 2013

Quickly and easily access unread mail.



#### Filter Tool - New in 2013

Filter Email is a new tool on the ribbon that allows you to quickly and easily filter your messages.



#### **Preview messages - New in 2013**

See which messages demand your immediate attention by viewing up to the first 3 lines of body text. The default number of lines to view is 2.

- Change the number of lines to preview
  - 1. Select View, Message Preview, select the desired number of lines to view or select Off.

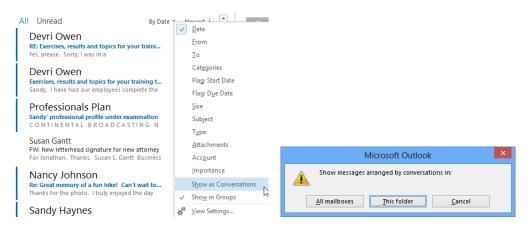
Sue Encherman RE: Invoice Attached I'll talk to you next week about it Sent from	C2 Fri 7/19	VIEW <
Mark Anderson RE: Following Up to Confirm 8/22 and 8/29 Hi Sandy, This helps. Thanks for that link. I	C Fri 7/19	Message Preview *
Mark Anderson Following Up to Confirm 8/22 and 8/29 Trai Hi Sandy,	으 Fri 7/19	<u>O</u> ff <u>1</u> Line
Devri Owen RE: Images needed for electronic stationary They are attached. Thanks!	0 Fri 7/19	✓ <u>2</u> Lines <u>3</u> Lines

#### Conversations

Emails can be grouped into conversations based on the subject of the email, regardless of the folder that contains the messages (which means sent items are included as well). This grouping hides the older, redundant content of conversations. Clicking on a conversation will show you the content of the latest email in the thread and enable you to quickly read an entire set of messages. You can also easily categorize, move, ignore (delete current and future emails), or mark a complete conversation as read in one click. Once you categorize a conversation, Outlook 2013 will automatically categorize new items that arrive in that conversation!

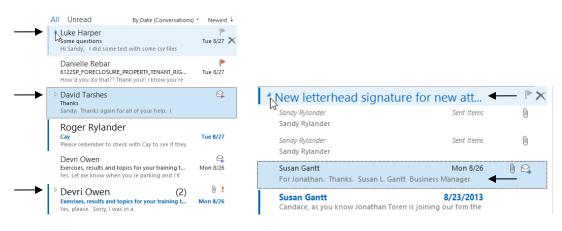
#### **Conversation View**

- Select Conversation View
  - 1. Click the drop-down next to By Date and select Show as Conversations. Then select This Folder.



2. Conversations appear with arrows on the left of the email message. Click the arrow to display the conversation.

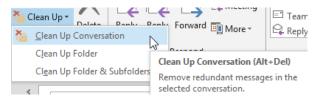
Sometimes it will say you need to click the arrow a second time to see even more messages. The email thread will expand to show you email in the Inbox and Sent items folder that are related to this message.





#### **Clean Up Conversations**

When a message contains all the previous messages in the Conversation, you can click **Clean Up** to eliminate the other redundant messages. For example, as people reply to a Conversation, the response is at the top and the previous messages in the Conversation are below. Instead of reviewing each message, keep only the most recent that includes the whole Conversation. Clean Up is even smart enough to keep messages that have attachments, flags, or categories. Clean Up is available on an individual conversation or a whole folder, and can be customized to move the redundant content to any folder in your store. For example, you can move the cleaned-up messages to an archive or filed folder in your mailbox.



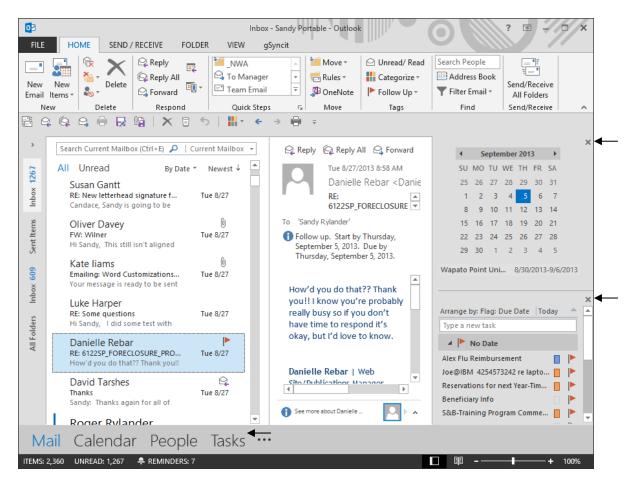
#### **Ignore Conversation**

If a conversation is no longer relevant to you, you can prevent additional responses from appearing in your Inbox. The **Ignore** command moves the whole Conversation and any future messages that arrive in the Conversation to the **Deleted Items** folder.



#### Docking Sneak Peeks (recreating the 2010 To-Do Bar)

The To-Do Bar in Outlook 2010 displayed Tasks and Calendar while viewing your inbox. That feature has been replaced with docking Sneak Peeks. When you point to the Tasks or Calendar at the bottom of the Outlook screen, a Sneak Peak appears. Clicking on the docking icon in the upper right corner, docks it to the right side of your screen. Click the "x" to remove the docked view.

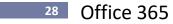


#### Attachments

#### **Attachment Preview**

View your attachments from within the Reading Pane by clicking on the attachment. To view the email message again, click on the email in the messages pane to the left.

from:(laura) subject:(signature)     ×     Current Mailbox ▼       All     Unread     By Date ▼     Newest ↓       ▲ Older     Author:     NWA       Last changed:     Friday, May 24, 2013								
<mark>Laura</mark> Smith Automatic <mark>Signature</mark> Block for C Good Morning Sandy, As we	Dutlo	0 5/24/2013	Message	🐨 Automatic Signature Blocks.doc (216 KB)				
Click on the message he viewing message text.	re to retu	G Irn to	informat Signatur number name, ac informat can have and one Exercises	Automatic Signature Blocks ic Signature blocks are a great way to share your ion with the people who receive your messages. e blocks can be as simple as your name and phone (for internal use), or they can include your company iddress, phone and fax number, and any other ion that you would like the recipient to receive. You t two default signature blocks: one for new messages for replies. ate an Automatic Signature Block				



#### **Save Attachments**

Save one, many, or all attachments that are sent to you.

#### Exercise:

- Save an Individual Attachment
  - 1. Select the email with the desired attachment.
  - 2. Right click the Attachment.
  - 3. Select Save As.

#### RE: Quote for work on Word templates

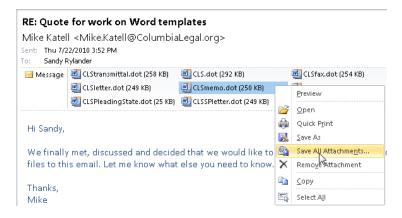
Mike Katel	/ike Katell <mike.katell@columbialegal.org></mike.katell@columbialegal.org>								
Sent: Thu 7/2 Fo: Sandy R	2/2010 3:52 PM tylander	< Se	lect this attachment.						
🖂 Message	👜 CLStransmittal.dot (258 KB)	🖳 CLS.dot (29	-	Preview					
	👜 CLSIetter.dot (249 KB)	👜 CLSmemo.(							
	CLSPleadingState.dot (25 KB)	🗾 CLSSPlette	2	<u>O</u> pen					
				Quick P <u>r</u> int					
Hi Sandy,			R	Save As					
			0	Save All Attachme <u>n</u> ts					
Wefinally	met, discussed and decide	×	Remo <u>v</u> e Attachment						
files to thi	s email. Let me know what	Þ	<u>C</u> opy						
Thanks,			8₽	Select A <u>l</u> l					

4. The Save Attachment dialog box will appear to allow you to **select the folder** in which you wish to place the attachment.

O Save Attachment	
🚫 🗸 📗 « Sandy Rylander 🕨 My Documents 🕨	✓ 4y Search My Documents
Organize 🔻 New folder	i 🕶 🗸 🔞
<ul> <li>➢ Libraries</li> <li>➢ Documents</li> <li>J Music</li> <li>➢ Pictures</li> <li>☑ Videos</li> <li>☑ Homegroup</li> </ul>	Name  Name  LUSINESS  LMicrosoft Articles  LAdobe L
File name: CLSfax.dot Save as type: Microsoft Word 97 - 2003 Template (*.dot)	▼ ▼ Tools ▼ Save Cancel

5. After selecting the desired folder, click Save.

- Save Multiple attachments
  - 1. Select the email with the desired attachment(s).
  - 2. Right click any attachment.
  - 3. Select Save All Attachments.



4. The first **Save All Attachments** dialog box appears. Select all the attachments you would like to save to a single folder. Then click **OK**.

Save All Attachments	
Attachments:	
CLStransmittal.dot CLS.dot CLSfax.dot CLSfetter.dot CLSPleading.dot CLSPleadingState.dot CLSPleadingState.dot	Close

5. The second **Save All Attachments** dialog box appears. Select the folder where you wish the files to be saved. Click **OK**.

O Save Attachment	X
💮 🗸 👔 « Sandy Rylander 🕨 My Documents 🕨	✓ 4 Search My Documents
Organize 👻 New folder	8= - 🔞
CLSfax.det      Fic name: CLSfax.det	Name  BUSINESS  BUSINESS  Control Articles  Control Articles  Access  Adobe Backberry Control Dreamweaver  Contro
File <u>n</u> ame: <u>CLSfax.dot</u> Save as <u>type</u> : Microsoft Word 97 - 2003 Template (*.dot)	
Save as type: [Microsoft Wold 97 - 2003 Template [ .dot]     Save as type: [Microsoft Wold 97 - 2003 Template [ .dot]     Hide Folders	Tools - Save Cancel

- 6. If you don't save all attachments at once, the first dialog box will reappear to allow you to save more attachments. This allows you to save attachments to different folders.
- 7. Click Close when done.



#### **Print All Attachments**

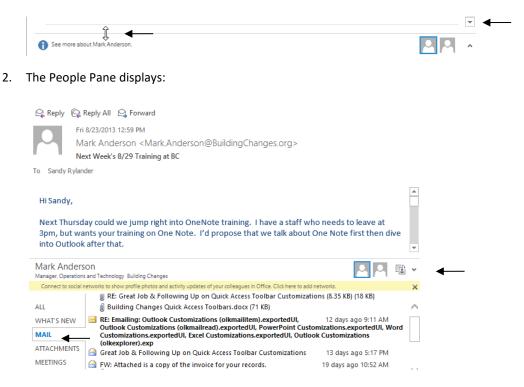
1. Select an email with Attachments and select File, Print, Print Options, Print Attached Files, Print.

E		Inbox - Sandy Portable - Outlook
Info	Print	
Open & Export	Specify how you want the	Print
Save As	item to be printed and then click Print.	Printer Name: EPSON Remote Print(WF-3540)
Save Attachments	Print	Status: Type: EPSON Remote Print Where: Print to file
Print	Printer <sup>©</sup>	Comment:
Office Account	EPSON Remote Print(WF-35 Ready	Print style Copies Table Style Page Setup Table Style Mumber of pages: All  Mumber of copies: 1 Collate copies Collate copies
Options	Contribution and	Memo Style Define Styles
Exit	Settings Table Style	Page range
	Memo Style	All     Pages:     Type page numbers and/or page ranges separated by
		commas counting from the start of the item. For example, type 1, 3 or 5-12.
		Print options
		✓ Print attached files. Attachments will print to the default printer only.
		Print Preview Cancel

#### **People Pane**

Brings social views of friends/contacts into your inbox with a stream of content form social networking sites. At the bottom of Outlook emails will be the social networking posts of your contact.

1. To display the People Pane, either click the arrow at the bottom right corner of the reading pane or point to the line separating the reading view from the People Pane and drag up or down for the desired view. See below:



#### AutoCreate

AutoCreate is one of Outlook's greatest productivity features. It creates new items from existing items. If you drag an Outlook item (i.e. an appointment, a contact, a task, an email) to a folder of a different type, Outlook will AutoCreate a new item of that type.

For instance, by simply dragging an email to the Contacts folder, Outlook will AutoCreate a new Contact with the name and address already filled in! You can also drag an email to a task folder and Outlook will AutoCreate a Task. Drag an email to the calendar to AutoCreate an appointment.

#### Exercise:

AutoCreate a Contact from an Email Message

#### 1. Drag a Message to the People folder.

Outlook AutoCreates a Contact with the name and email address filled in. The body of the message is placed in the Contact Notes area.

Devri Owen Exercises, results and topics for your tra Yes. Let me know when you're parking a	
Devri Owen Exercises, results and topics for your tra Yes, please. Sorry, I was in a marketing/	
Professionals Plan Sandy' professional prof/e under exam	inati
ıdar People <sup>⊭</sup> Tasks •	

2. Copy and paste or drag and drop information from the signature block to complete the contact and then delete the remainder of the message from the notes area.

	Ŷ	↓ =	FORMAT TEXT	Devri Owen - Cont	act	0	? 5	∃ <i>→</i> □	×
Save & Delete	Save & Forward OneNot		General Details General Certificates All Fields	REVIEW gSyncit	Address Check Book Names	Business Picture Card	Categorize • Follow Up •	Zoom	
Actions	s		Show	Communicate	Names	Options	Tags	Zoom	^
Full Name Company Job title File as Internet Display as Web page addres	<b>•</b>	Devri Or Owen, I dowen@ Devri Or	Devri <u>sbwllp.com</u>		Notes	Devri Ow dowen@st	wilp.com	• • • • • • • •	
IM address									
hone numbers					Devri	K. Owen   Savitt B	ruce & Willev IIp		
Business	-					Administrator			
Home	•					a Green Building   1	425 Fourth Avenu	e, Suite 800	
Business Fax	-					le, WA 98101-2272 06/749-0600   <u>ww</u>		001	
Mobile	-								
See more about Devri 0	Owen.							2	^

- **3.** Drag to select the company name.
- 4. Ctrl + X to cut.
- 5. Click in the Company box.
- 6. Ctrl + V to paste.
- 7. Repeat these steps for the address, phone and fax numbers.
- 9. Click in the notes area and press
  Ctrl + A to select the entire email message.
  Press Delete.

10. Click Save and Close when done.



AutoCreate a Task from an Email Message

#### 1. Drag a Message to the Tasks folder.

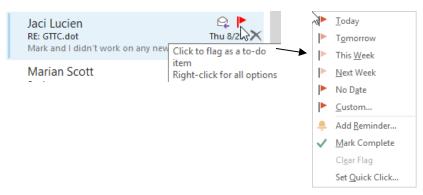
Outlook AutoCreates a Task with the subject filled in. The body of the message is placed in the Task's Notes area.

2. If necessary, make modifications to the subject, add a due date, assign the task to someone else, etc. When done, click **Save and Close**.

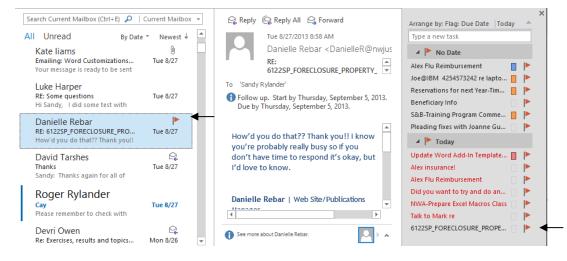
#### Create a Task from an Email with a Click

When you hover over an email, some icons appear. Clicking the flag makes places an item on the Task list. Right-clicking the flag gives you the options shown below.

**IMPORTANT!** This is not the same as AutoCreating a task. AutoCreate will create a new Task item which allows you to then delete the email. Flagging an item as a task will display the email as a task as well as an email. Deleting from either location will delete it from both displays.



#### A message flagged and displayed as a task:



#### **Group and Sort Messages**

Grouping, Sorting, and Finding Messages are all very useful features. They can help you retrieve important messages, delete obsolete messages, and organize messages into folders. Below are samples of what each of them does.

**Grouping** allows messages to be grouped under a heading which can be collapsed or expanded by clicking on the "+" or "-" next to the heading. Notice the **Sender name** headings below.

#### Exercise:

- Group Message by drop down at the top of the messages view and click From.
  - 1. On the By drop down at the top of the messages view, click the By **From**. *Notice that messages are now grouped by from instead of date.*

Search Current Mailbox (Ctrl+E)	Turren	nt Mailbox 👻	
All Unread By From	¥	A 4- 7   A	
4 Devri Owen	Ï	<u>D</u> ate	
Devri Owen	- v	<u>F</u> rom	These messages are Grouped by From. Notice
Re: Exercises, results and topics for your training tomorrow		To	the headings are Senders Names.
Yes. Let me know when you're parking and I'll come down to		Cat <u>eg</u> ories	A <sup>*</sup> next to a heading indicates that messages
Devri Owen		Flag: Start Date	can be hidden by clicking the which
RE: Exercises, results and topics for your training tomorrow Yes, please. Sorry, I was in a marketing/management meeting.		Flag: D <u>u</u> e Date	can be hidden by clicking the which collapses the group.
		Size	B
Devri Owen Exercises, results and topics for your training tomorrow		Subject	
Sandy, I have had our employees complete the three exercises		Т <u>у</u> ре	
Devri Owen		<u>A</u> ttachments	
RE: Invoice Attached. Potential training dates and times. Sandy, Let's plan for the 27th, say from 9am – noon? Thanks		Acc <u>o</u> unt	
sanay, eees planter die eren, say nom sum - noom munits		Importance	

- 2. Try collapsing the view of one sender by clicking the arrow to the left of their name.
- 3. Collapse all groups by right clicking on any group header and selecting Collapse All Groups.

▲ Devri Owen			
Devri Owen		Collapse All <u>G</u> roups	
Re: Exercises, results and		Expand All Groups	63
Yes. Let me know when y		<u>O</u> pen	
Devri Owen	Ē	<u>С</u> ору	
RE: Exercises, results and Yes, please. Sorry, I was	$\Box$	Mar <u>k</u> as Read	
Devri Owen	<b>P</b>	Mark as U <u>n</u> read	
Exercises, results and top		Ca <u>t</u> egorize	۱.
Sandy, I have had our e		Follow <u>U</u> p	F
Devri Owen	4	<u>Q</u> uick Steps	Þ
RE: Invoice Attached. Po Sandy, Let's plan for the		Rule <u>s</u>	Þ
Devri Owen	ъ –	Move	F
RE: S&BLetterhead.dot	X	<u>D</u> elete	

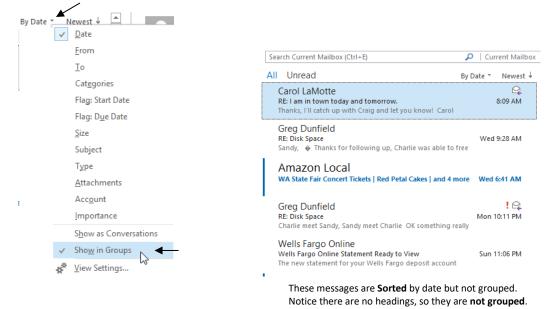
- 4. Expand all groups by right clicking on any group header and selecting Expand All Groups.
- 5. On the **By drop down** at the top of the messages view, click the By **Date**. *Notice that messages are now grouped by date instead of from.*



**Sort** allows messages to be sorted by a field like Date or Subject. Sorted messages can be grouped, but they don't have to be. Notice that the messages are now sorted by date, but they are not Grouped. There are no collapsible headings.

#### **Exercise:**

- Remove Group By
  - 1. Click the drop down next to By Date and deselect Show in Groups.



- Change the Sort Order to Sort Ascending or Descending in By From View
  - 1. Click the drop down to the right of Newest.



- Group by Date with the Newest on Top in By Date View
  - 1. On your own: Change the display to be grouped by Date showing the Newest on Top.



### Folders

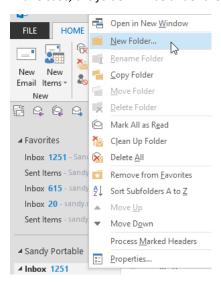
#### **Create Folders to Organize Messages**

Folders are a good way to organize messages. You can create folders to hold messages relating to certain projects, companies, people etc. You organize messages in folders just as you would physical documents in manila folders. Creating folders is quick and easy. Once a folder is created, you can move or copy messages into the folders. Be sure to clean out these folders regularly to avoid huge storage issues.

#### Exercise:

- Create a Mail Folder
  - 1. **Right click the Inbox** folder and select **New Folder**. New folders will automatically be placed under the currently selected folder.

*In this case, the folder will be under the Inbox folder.* 



2. Type the folder name and press Enter.

⊿ In	box 1251
	Important
	Class

#### Arrange Folders in any Order – New in 2013

For the first time, you can arrange folders in the order you choose rather than having them arranged in alphabetical order. Simply drag folders to the desired location.

⊿ Ca	rolt@adve	nture	-works.	com
<b>⊿</b> [n	box 25			
	Market Dat	a 55		
			N.	
	Fourth Coff	ee	12	
	Manager 5		m	
	Personal 1	,		



#### Move, Copy and Delete Messages

Now that you have learned how to Group, Sort and Search, you can use the results of these functions to quickly move or copy messages into folders, or to delete obsolete messages.

#### Exercise:

- Select desired messages
  - 1. **Click** the first message and **shift + click** the last. Selects and highlights all messages from where you click to where you shift click.
  - 2. **Ctrl + click** to select or deselect subsequent non-sequential messages. *Selects or deselects names that you ctrl + click.*
- Move messages (message no longer in original folder)
  - 1. Select messages as outlined above.
  - 2. Drag message(s) to desired folder.
- Copy messages (message in both the original folder and the new folder)
  - 1. Select messages as outlined above.
  - 2. Right drag messages to desired folder and select Copy when menu appears.
- Delete Messages

It is very important to delete messages that are no longer needed to prevent your mailbox from becoming huge. Be sure to not only delete messages from your Inbox, but also check your **Sent Items, Deleted Items,** and **Email Folders you create**.

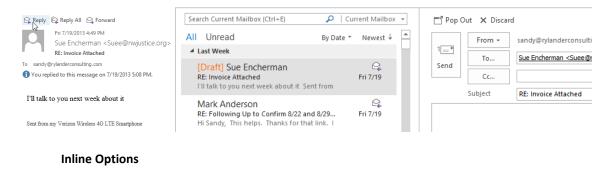
**Tip!** To permanently delete items (bypassing the intermediate Deleted Items stage): Hold the **Shift** key down while pressing the **delete** key or clicking the delete tool.

- 1. Select messages as outlined above.
- 2. Press Delete.

#### **Replying to a Message**

#### Inline replies - New in 2013

Reply by typing your response right in the Reading Pane. This allows drafts to be saved automatically! Notice the word [Draft] appears in your email list reminding you to complete the email. Not all formatting options are available Inline. To access additional options, select Pop Out.



#### 0 COMPOSE TOOLS Inbox - Sandy Outlook - Out HOME SEND / RECEIVE FOLDER VIEW DEVELOPER FILE gSyncit MESSAGE 💾 🐰 Cut High Importance 📫 💑 I Calibri (Bc • 11 • A A | = • = • A 1 -Сору Low Importance B I U 🔤 - A - 🚍 = E 📾 Address Check Attach Signature Paste Bcc ؇ Format Painter Book Names File Item \* Basic Text Clipboard E. G Names Include Tage Show Fields

## **Pop Out Options**

FIL	E MESSAGE	INSERT OPTIONS FORMAT TE	XT REVIEW DEVELOPER	R gSyncit		
Paste	Cut Copy	Calibri (Bc * 11 * A* A* )         B       I       I       I* A* I       I		Image: AttackAttackSignatureFileItem **	<ul> <li>Follow Up *</li> <li>High Importance</li> <li>Low Importance</li> </ul>	Zoom
	Clipboard	Basic Text	🖙 Names	Include	Tags 5	Zoom

## Using the Ribbon



- **Reply to a Message** 
  - Select the email you wish to respond to and click the **Reply** tool on the Home tab. 1.
  - 2. The original sender's name is automatically placed in the **To** box.
  - 3. Type the desired message and press Send.
- Tip! Replies **DO NOT** include any attachments sent to you.



#### Reply To All

- 1. Select the email you wish to respond to and click the Reply to All tool on the Home tab.
- 2. All names that were originally in the **To** or the **CC** box will automatically be in the reply.
- 3. Type the desired message and press Send.

Note: Only use Reply To All when absolutely necessary!

#### **Reply and Reply All Improved**

Reply and Reply All will always reply to the latest message in the conversation. If you open an older message in the conversation and hit Reply Outlook 2013 will display a warning that allows you to go to the latest message in the conversation.

#### Forwarding a Message

## Exercise:

- Forward a Message
  - 1. Select the email you wish to respond to and click the **Forward** tool on the Home tab.
  - 2. Select or type the desired recipients in the **To** box.
  - 3. Type the desired message and press **Send**.
- **Tip!** Forwards **DO** include any attachments sent to you.

Create/Use Group Contact (Distribution) Lists

Distribution lists come in two forms:

- 1. Lists created by your Systems Administrator that can be selected from the Global Address List which contains internal names only.
- 2. Lists you create using names from any contact list, including the Global Address List, your Contacts folder, any public Contacts folders, etc.

- Create a Distribution List
  - 1. Select your Contacts Folder.
  - 2. On the Home tab, select Address Book.



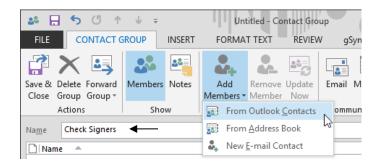
3. Select File, New Entry.

X 🛛 ฟ   🖁	• • 🖬		Address Book: Cont	tacts	- • ×
	File	Edit Tools			
New Entry	2	ch:   Name only  Me	ore columns Address Book		
New Message	Ctrl+N		Go Contacts - sandy@r	ylanderconsulting.com 👻	Advanced Find
Add to Contacts		ime	Display Name	E-mail Address	
Delete	Ctrl+D	Aaron J. Wolff	Aaron J. Wolff (aaron@thec	duifirm.c aaron@theduifirm	.com 🔥
		Adele & Byron Piro	Adele & Byron Piro (adeleni	ro@maadeleniro@mac.co	m

4. Select New Contact Group. Click OK.

	×		New Entry	
New Contact		elect the entry type:		
	~	New Centert		

5. Type a **Distribution List Name** in the Name box and select **Add Members**. Select **From Outlook Contacts or From Address Book**.



6. Select members desired and click **Members** to add them to the list. Click **OK**, **Save and Close**. Click the **"x"** to close the final screen. This distribution list can be found in your contacts folder.

Search:      Name only O More co	lumns Address Book	nsulting.com V Advanced Fi	nd
Name	Display Name	E-mail Address	_
🚨 Aaron J. Wolff	Aaron J. Wolff (aaron@theduifirm.c	aaron@theduifirm.com	~
Adele & Byron Piro	Adele & Byron Piro (adelepiro@ma	adelepiro@mac.com	
🚨 Aileen Lu	Aileen Lu (aileenlu@hotmail.com)	aileenlu@hotmail.com	
Lain Orozco	Alain Orozco (alain_orozco@hotma	alain_orozco@hotmail.com	1
💄 Alex Rylander	Alex Rylander (alexhvzr1@gmail.com)	alexhvzr1@gmail.com	
	Alice Heimbeck (alice.heimbeck@co	alice.heimbeck@colliers.com	
🌡 Alice Truan	Alice Truan (atruan@williamskastne	atruan@williamskastner.com	1
🚨 Alice Truan	Alice Truan (Business Fax)	Alice Truan@+1 (206) 628-6611	
🚨 Alicia Phifer	Alicia Phifer (alicia_phifer@hotmail	alicia_phifer@hotmail.com	
🚨 Alison McIrvin	Alison McIrvin (alison.mcirvin@gma	alison.mcirvin@gmail.com	
🚨 Andrea Ballard	Andrea Ballard (andrea@topnetwo	andrea@topnetwork.com	
🚨 Andy Stearns	Andy Stearns (andrew.stearns@gm	and rew.stearns@gmail.com	
🚨 Ann & Perry Bongiani and Famil	y Ann & Perry Bongiani and Family (a	annbongiani@comcast.net	
🊨 Ann & Perry Bongiani and Famil	y Ann & Perry Bongiani and Family (p	perry.bongiani@pharma.novartis	i -
🊨 Ann Marie Khalifa	Ann Marie Khalifa (annmarie@cmu	annmarie@cmu.edu	~
<		>	
Alice Heimbeck (ali	orozco@hotmail.com); Alex Rylander   ce.heimbeck@colliers.com); Alicia Phife rew.stearns@gmail.com)		

7. Personal Distribution Lists can easily be spotted in your People folder because they have a multihead icon indicating that they are distribution lists.





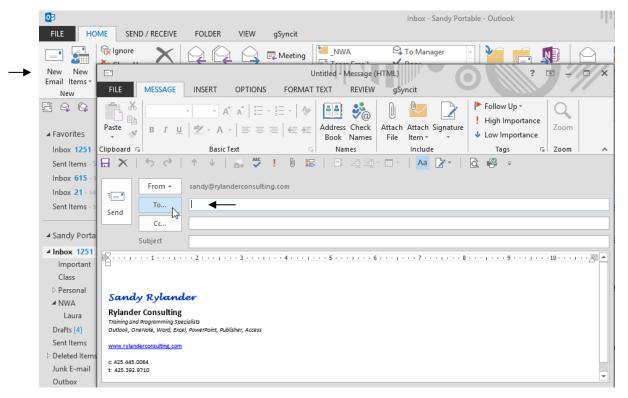
## **Create and Send a Message**

**Create a Message** 

- 1. When in Mail view, click the **New Email** tool on the Home tab.
- 2. Select the recipient(s).
- 3. Click in the **Subject** box and type the message subject.
- 4. Click in the **Body** area and type the message text.
- 5. Select Options or Attachment File if desired.
- 6. Click Send.

#### Exercise:

- Create a New Message
  - 1. When in **Mail** view, click the **New Email** tool on the Home tab. *A new Untitled Message appears.*



#### Add a To Recipient using the To Button

You can add recipients by typing the email address in the **To** box as we will explore when we add names to the CC (carbon copy) box.

1. Click the **To** button to display the Select Names dialog box.

2. Click the **Address Book** drop-down arrow in the dialog box to display other address books. The **Global Address List** contains internal email addresses where **Contacts** contains addresses you have entered.

Search:	columns Address Book	/landerconsulting.com V Advance	ed Find	drop-down to display other address books.
Name	Display Name	E-mail Address		
Aaron J. Wolff     Adele & Byron Piro     Aileen Lu     Alain Orozco     Alex Rylander     Alice Truan     Alice Truan     Alice Truan     Alice Phifer     Alice Infier     Alice Phifer     Alice Ablard     Andy Stearns     Ann & Perry Bongiani and Fa     C     C ->     Bcc ->	Adele & Byron Piro (adelepir Aileen Lu (aileenlu@hotmail Alain Orozco (alain_orozco@ Alex Rylander (alexhvzr1@gn Alice Heimbeck (alice.heimbe Alice Truan (atruan@william: Alicia Truan (Business Fax) Alicia Phifer (alicia_phifer@h Alison McIrvin (alison.mcirvir Andrea Ballard (andrea@top Andy Stearns (andrew.stearr	Photma alain_orozco@hotmail.com nail.com) alexhvzr1@gmail.com eck@co alice.heimbeck@colliers.cor skastne atruan@williamskastner.co Alice Truan@+1 (206) 628-6 otmail alicia_phifer@hotmail.com n@gma alison.mcivin@gmail.com netwo andrea@topnetwork.com amily (a annbongiani@comcast.net	n m 511	<b>Double Click</b> a name to select it and place in the <b>To</b> box.

3. Start typing the recipient's name to quickly find the name on the list.

4. Double click a name in the list to add it to the To box.

## Add Multiple Recipients using the To Button

- Click the first name and shift + click the last. Selects all names from where you click to where you shift click.
- 2. **Ctrl + click** to select or deselect subsequent names. Selects or deselects names that you ctrl + click.
- 3. Then click to To button in the Select Names box to add the names to the To box. Click OK.

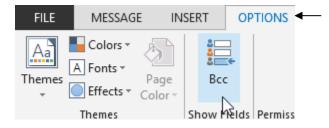
earch:   Name only  N		©rylanderconsulting.com ↓ Advance	Find	
Name       Aaron J. Wolff       Adele & Byron Piro       Alien Lu       Alain Orozco       Alice Heimbeck       Alice Truan       Alica Phifer       Alica Phifer       Alica Phifer       Alica Vistearns       Y       Cc ->       Bcc ->	Adele & Byron Piro (adele Aileen Lu (alieenlu®hotm Alain Orozco (alain_orozc Alex Rylander (alexhvzr) @ Alice Heimbeck (alice.hein Alice Truan (atruan@vilik Alice Truan (atruan@vilik Alica Phifer (alicia_phifer Alison McIrvin (alison.mci Andrea Ballard (andrea@ Andv Stearns (andrew.ste Click the To huttron	o@hotma alain_orozco@hotmail.com Igmail.com) alexhvzr1@gmail.com Ibeck@co alice.heimbeck@colliers.com Imskastne atruan@williamskastner.com	the Clicl	re. Selects all names betw < and the Shift + Click. :lick here ick. Selects individual item ick



- Type a CC (carbon copy) Recipient
  - 1. Start typing an email address in the **CC** box. As you type Outlook invokes the **automatic completion of email names** which displays names you have sent email to in the past. Click on the X to delete a name from the list.

<u>С</u> с	la  ]	
S <u>u</u> bject	Laura Smith	× -
1	Laura Smith	
	Laura Smith	
	laura smith	
	Laura Dangel	
	Laura Lohman	
	Laurie Roffman	Ŧ

- Add Multiple BCC (blind carbon copy) Recipients using an Email Address Book
  - Click the BCC button (if it is not visible, click the To or the CC. Any of these tools will display the Select Names dialog box).
     BCC recipients will receive a copy of the email, but the To and CC recipients will not see BCC email address.
- Tip! To display the BCC option on the email message itself, select BCC from the Options tab.



- 2. **Click** the first name and **shift + click** the last. Selects all names from where you click to where you shift click.
- 3. **Ctrl + click** to select or deselect subsequent names. Selects or deselects names that you ctrl + click.
- 4. Then click to **BCC** button to add the names to the BCC box.
- Send Message with High Importance
  - Click the High Importance tool on the Message tab if this is an urgent email. The recipient will see the red exclamation point and understand that this is an urgent email.



### Add the Subject and the Body

2. Type the **Subject** and the **body** of the message.

#### **Subject Line Spell Check – New in 2013**

Now you don't have to worry about incorrect spelling in your subject line.

**Contextual Spelling – New in 2013** 

Will check email messages like I'll see you their.

	I≣ 👻 • 🛓 • 🛊 🛊 🗄 •
I'll see you their.	
Cand. D.	there
Sandy Ry	I <u>a</u> nore
Rylander Col	Ignore All
Training and Progr	Add to Dictionary

## **Auto-Complete List improvements**

It is easier to remove a name from the Auto-Complete List suggestions, and when you are using a Microsoft Exchange Server account, your Auto-Complete List is available from any computer that you use Outlook with your Exchange account.

To	Bruce	
<u>C</u> c	bruce@fabrikam.com	×
S <u>u</u> bject:		

#### Attachment Reminders - New in 2013

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

#### **Forgotten Subjects**

When you click **Send** on a message that does not have a subject, a message appears to confirm that no subject was intentional.

Â	Do you want to send this m without a subject?	nessage



### **Quick Parts**

Quick Parts gives you the ability to store text and easily insert it into future email simply by selecting it from a drop-down list. Quick Parts can not only save small portions of text, but pages of text and graphics. You can create Table and Quick Part Building Blocks in just seconds. Saving these items enables you to quickly insert your custom tables etc. into an email. The Building Blocks Organizer which can be accessed by right clicking on any Quick Part displayed on Quick Part drop-down allows you to view, sort, insert and delete Building Blocks as well as to edit their properties.

#### **Create a Quick Part**

- 1. Select the text you wish to save to a Quick Part.
- 2. On the Insert tab of a new email select **Quick Parts, Save Selection to Quick Part Gallery**. *Make sure you are in the body of the email or the dialog box will be disabled.*

FILE	MESSAGE	INSERT	OPTIONS	FORMAT T	EXT REVIEW	gSyncit		Ille
<u>N</u>	0		-	R (7,	🛞 Hyperlink	A Text Box -	A Drop Cap -	$\pi$ Equa
Attach O	utlaak	Table Pict	tures Online	Shares 1	Bookmark	🗉 Quick Parts 🕶	편 Date & Time	Ω Symt
	Item 🖉 -	Table Pic	Pictures 👻 👜 🎽		≦jji <u>A</u> utoText		Þ	
Inc	clude	Tables	Illustrat		Links	Save Select	ion to Quick Part Ga	llery
	50	$\uparrow \downarrow$	ABC	! 0 🏪	Aa 🔀 🕶	<u>l</u> Q, <b>1</b>	AF.	
ः Send	From • To Cc Bcc	san dy@ryla	nderconsultin	.g.com				
	Subject							
				t (425) 445-00		5 1	6	7 .

- 3. Give the Quick Part a name (i.e. Questions).
- 4. Select the AutoText Gallery.
- 5. Create a new Category called \_My Snippets. Click OK.

_	Modify Building Block ? ×
<u>N</u> ame:	Questions
<u>G</u> allery:	AutoText 🗸
<u>C</u> ategory:	My Snippets 🗸
<u>D</u> escription:	
<u>S</u> ave in:	NormalEmail.dotm 🗸
Options:	Insert content only
	OK Cancel

#### **Insert a Quick Part**

Click in the body of an email where you want the Quick Part inserted.
 Select Insert, Quick Parts, AutoText, click on the desired Quick Part (i.e. Questions).

## Create a Quick Table

- 1. Select the table you wish to save to a Quick Table.
- 2. On the Insert tab of a new email select **Quick Parts, Save Selection to Quick Part Gallery**. *Make sure you are in the body of the email or the dialog box will be disabled.*

Creat	e New Building Block ?	×
<u>N</u> ame:	Client	
<u>G</u> allery:	Tables	<b>~</b>
<u>C</u> ategory:	My Tables	<b>Y</b>
<u>D</u> escription:		
<u>S</u> ave in:	NormalEmail.dotm	<b>~</b>
Options:	Insert content only	~
	OK Cancel	

- 3. Give the Quick Part a name (i.e. Client).
- 4. Select the Tables Gallery.
- 5. Create a new Category called \_My Tables. Click OK.

### **Insert a Quick Table**

Click in the body of an email where you want the Quick Table inserted.
 Select Insert, Table, Quick Tables, click on the desired Quick Table (i.e. Client).

INSE	RT OPTIONS	FORMA	AT TEXT REVIEW	gSyncit		
Table	Pictures Online Picture			Text Box *	A Drop Cap → Dote & Time Dote & Time Object	π Equation ▼ Ω Symbol ▼ A= Horizontal Line
Insert	Table		Links	Т	ext	Symbols
	sert Table raw Table ccel Spreadsheet			iv   Aa [≱v	· · · 6 · · · · I ·	7
🔲 Q	uick <u>T</u> ables	۱.	_My Tables			
		1	Client	G		
			Names	Address	Phone ery	



#### **Organize and Delete Quick Parts**

The Building Blocks Organizer which can be accessed by right clicking on any Quick Part displayed on Quick Part drop-down allows you to view, sort, insert and delete Building Blocks as well as to edit their properties.

1. Display the Building Blocks organizer by right clicking on any building block (i.e. Disclaimer) and selecting Organize and Delete...

Quick Parts *	
الم <u>A</u> utoText	_My Snippets
Save Selection to Quick Part Gallery	Questions
	If you have any guestions, please call me at (425) 445-0064.
	Insert at <u>C</u> urrent Document Position
	Insert at <u>B</u> eginning of Document
	Insert at <u>E</u> nd of Document
	Edit Properties
I	🧃 Save S 🗐 Organize and Delete
I	Add Gallery to Quick Access Toolbar

2. The Building Blocks Organizer is displayed. Here you can chose to Edit, Delete, Insert and/or sort your Building Blocks which include all Quick Parts. You can edit any properties as shown below.

			Building Blocks Organizer	? ×
Building block	ks:		Click a building block to see its preview	
Name Questions Client	Gallery AutoText Tables	Category _My Snippets _My Tables	Template B NormalEmai Ir NormalEmai Ir In	^
			Modify Building Block ? ×	
		<u>N</u> ame: Gallery: Category: Description: Save in: Options:	Questions       AutoText       _My Snippets       NormalEmail.dotm       V       Insert content only       VK       Cancel	
< Edit Properti	es	te <u>i</u> nser	Questions	V

3. Click Close when done.

### **Include Screen shot or Screen Clipping**

Sharing what you see on your screen is easy with the new Include screen shot command. Select all or any part of your computer screen and include a snapshot of it in a message.

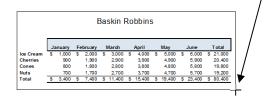
Screenshot	Q Hyperlink	Bookmark	A Text Box *	Quick Parts *	WordArt	50 D	rop Cap ⊤ Pate & Time Object	Eq
Available \	Windows							
				1.)ton, 4.145 	- 1			
Scree	n <u>C</u> lipping							.:

#### Exercise:

- Add a Screenshot to a message.
  - 1. Click in the body of a message and select Insert Screenshot.
  - 2. **Select one of the screens** from the Available windows. *The shot will be added at the insertion point.*
- Add a Screen Clipping to a message.
  - View the screen you want to clip in Excel.
     Important! This must be the last thing you view before returning directly to your e-mail message!
  - 2. Click in the body of a message and select Insert, Screenshot, Screen Clipping.
  - The screen will immediately return to the last screen you viewed and turn light in color. Crosshairs will appear. Carefully drag across the area you wish to clip. The shot will be added at the insertion point.

					Ju	SKIII I	10	bbins	0					
	j	anuary	Fe	bru ary		March		April		May		June	_	Total
-	S	1,000	S	2,000	S	3,000	S	4,000	S	5,000	S	6,000	S	21,000
ce Cream														
	Ŭ	900		1,900		2,900		3,900		4,900		5,900		20,400
Cherries	Ŭ	900 800		1,900 1,800		2,900 2,800		3,900 3,800		4,900 4,800		5,900 5,800		20,400
lce Cream Cherries Cones Nuts														

Drag crosshairs across from here.

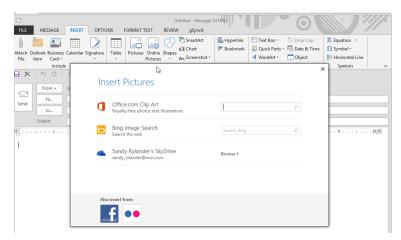


Drag crosshairs to here.



#### **Insert Online Picture - New in 2013**

You can insert Online Pictures in the message body using Bing image search. To search images, select the Insert, Online Picture button on the ribbon. You can search Office.com Clip Art, Bing or your SkyDrive account.



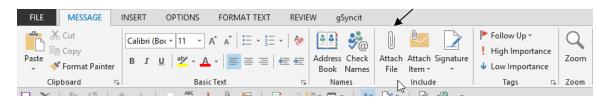
#### **MailTips**

Outlook 2013 includes MailTips, which help you avoid common, but potentially costly or embarrassing mistakes. MailTips alerts can be triggered by actions including clicking **Reply All** to a large recipient list, sending sensitive information to someone outside your organization, or sending a message to someone who is out of office.

#### **Add File Attachments**

Attachments can be files, zipped folders, photos, etc.

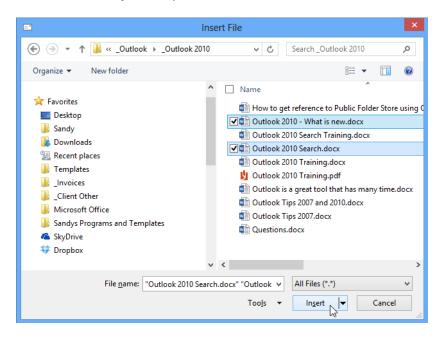
- Attach a Single File
  - 1. Click the Attach File tool on the Message tab.



- 2. When the Insert File dialog box appears, select the desired folder and file.
- 3. Double click the file.

#### Select Multiple Files at Once

- 1. Click the Attach File tool.
  - a. **Click** the first file and **shift + click** the last. Selects all files from where you click to where you shift click.
  - b. **Ctrl + click** to select or deselect subsequent files. Selects or deselects files that you ctrl + click.



## 2. Click Insert.

Attachments are added to email as shown below.

=	
FILE MESS	GE INSERT OPTIONS FORMATTEXT REVIEW gSyncit
Cut	▼ 11 ▼ A* A*   Ξ * Ξ *   & ■ ●
Paste	A = A =  A =  A =  A =  A =  A =  A =
Clipboard	🖓 Basic Text 🖓 Names
🗄 X   5	»   ↑ ↓   🚑 🖑 ! 🛛 🚌   🗉 🏹 🏹 - 🖬 -   🗛 🔀 -
Fron	✓ sandy@rylanderconsulting.com
Send	Susan Gantt
S <u>u</u> bject	Training Manuals
A <u>t</u> tache	💼 Outlook 2010 - What is new.docx (2 MB); 🖷 Outlook 2010 Search.docx (789 KB)

3. When the message is complete click Send.



#### Send Outlook Item Attachments

This is a great way to share information with others, or to send information to your home computer.

- Send Outlook Items (i.e. Appointments, Contacts, Tasks)
   In this exercise we are sending only contacts, but the same steps work for appointments, tasks etc.
  - 1. Select People view.

FILE HOME SEND / R	ECEIVE FOLDER VIEW gSyncit	
New Contact	Communicate Current View Actions Share	ess Card Follow Up - EAddress Book
<ul> <li>My Contacts</li> <li>Contacts - Sandy Portable</li> </ul>	Search Contacts (Ctrl+E) 123 2M Host ab Company: 2M Host	909 Coffee and Wine Company: 909 Coffee and Wine
Backup Contacts Contacts - sandy_rylander@ Connect to a social network	Here is your login information for (mailto:sandy_rylander@msn.com) e-g sandy_rylander@msn.com User name: (mailto:sandy_rylander@msn.com) hi sandy_rylander@msn.com Password: 7VA3zPaQjw Jk You can access your administration area using the following name: b	Company:     909 SW 152nd Street       Business:     909 SW 152nd Street       Business:     (206) 243-7909       Business Home Page:     www.909coffeeandwine.com       Categories:     P Restaurant       Angelos Italian Restaurant, Yos Bisro < end>
	Im Sth Avenue Theatre - Box Office, The Company: Sth Avenue Theatre - Box Of Business: The Sth Avenue Theatre - Box ( 1308 Sth Avenue Seattle, WA 98101 WX Business: (206) 625-1900 WX Categories: P Service Mo 12-5:00 YZ Tu - Sun 12-7:30 < end>	AAA #260-077014300 Company: AAA #260-077014300 Business: (800) 562-2582 Business Home Page: http://www.aaa.com User Name : SRylander Password : 2708Ccna <end></end>
Mail Calendar	People Tasks ···	Þ

- 2. **Click** the first name and **shift + click** the last. Selects all names from where you click to where you shift click.
- 3. **Ctrl + click** to select or deselect subsequent names. Selects or deselects names that you ctrl + click.
- 4. Select Forward Contact, As and Outlook Contact on the Home tab.
- 5. Complete the email by and click **Send**.

#### **Resize Attached Photos**

When attaching photos to an email, go to **File, Info** and view the options available to resize large attached pictures.

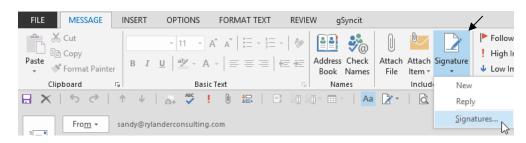


#### Automatic Signature Blocks

Automatic Signature blocks are a great way to share your information with the people who receive your messages. Signature blocks can be as simple as your name and phone number (for internal use), or they can include your company name, address, phone and fax number, and any other information that you would like the recipient to receive. You can have two default signature blocks: one for new messages and one for replies.

#### **Exercise:**

Create an Automatic Signature Block



1. Make sure you are in an email message and select Signature, Signatures on the Message tab.

#### 2. Select New.

Signatures a	nd Stationery		? ×
E-mail Signature Personal Stationery			
Sele <u>c</u> t signature to edit	Choose default sign	nature	
New	E-mail account:	sandy@rylanderconsulting.com	¥
Reply	New <u>m</u> essages:	New	~
	Replies/forwards:	Reply	*
Delete New Save Rename	]		
Lucida Handwritir v 13. v B I U		🔠 Business Card 🛛 📑 🖶	
Sandy Rylander Rylander Consulting Training and Programming Specialists Outlook, OneNote, Word, Excel, PowerPoint, Publisher, Acces www.rylander.consulting.com c: 425.445.0064 t: 425.392.9710	5		*
			*
		ОК	Cancel



3. Type a descriptive signature name like New or Reply and click OK.

New	Signature	?	×
<u>T</u> ype a na New	ime for this sigr	nature:	
	ОК	Can	cel

#### 4. **Type your signature** as desired.

If you wish to use different fonts etc., highlight the desired text and use the Font buttons.

	Signatures and Stationery ?	×
E-mail Signature Personal Stationery		
Sele <u>c</u> t signature to edit New Reply	Choose default signature E-mail account: sandy@rylanderconsulting.com New messages: New Replies/forwards: Reply	> >
Delete     New     Save       Edit_signature     Edit_signature       Lucida Handwritir     13.!     ■       Sandy Rylander       Rylander Consulting       Training and Programming Specialists       Outlook, OneNote, Word, Excel, PowerPoin	←	^
www.rylanderconsulting.com c: 425.445.0064 t: 425.392.9710	OK Can	¢

- 5. Click the **Signature for new messages** drop-down and select the signature you would like for new messages.
- 6. Click the **Signature for replies and forwards** drop-down and select the signature you would like for replies and forwards.
- 7. Click **OK** when done. Try creating a new email to see how the signature works.
- Change Signature Block On-the-Fly
  - 1. **Right click the signature block** in your message and select the desired signature block (only available if using Word as your email editor).



### **Message Sending Options**

Before sending an email you can add a variety of options.

FILE	MESSAG	e in	SERT OP	TIONS	FORMAT TE	XT REVIE	V DEVELO	PER	gSyno	it:	
Themes	Colors ▼ A Fonts ▼ Effects ▼	ð Page Color ∗	å ■ Bcc		Use Voting Buttons *		Delivery Receip Read Receipt		Save Sent Item To •		Direct Replies To
	Themes		Show Fields	Permission		Tracking		БĹ	Mor	e Option	s 🕞

#### Add Options to an Email

- 1. Create a new email.
- 2. Click **Options** tab on the ribbon.
- 3. When the message options appear, select the options you want from the various options, and click OK.
- 4. Complete the email and click Send.

## **Voting Buttons**

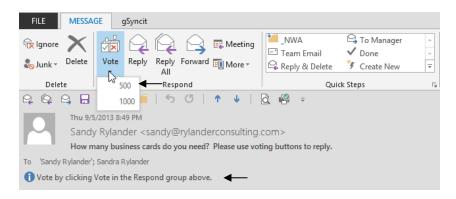
Voting Buttons allow you to ask a question to a group of recipients and allow them to respond by clicking on a button. For instance, if you want to know how many people would like to order 500 business cards or 1000 you would ask in the subject line of the email to select the number of business cards desired. The recipients would then click the 500 or the 1000 button. After selecting the button, they are asked if they wish to immediately send the response, or add comments by selecting edit message before sending. Voting buttons do not appear on the sent message; they appear only when the message is received. One great advantage to using voting buttons is the ability to track everyone's responses on one screen.

Request a Delivery Receipt	Properties
Use Voting Request a Read Receipt Buttons - Tracking 5	Settings Security  Importance Normal  Security  Change security settings for this message. Sensitivity Normal  Change security settings  Change security settings  Change security settings  Change security settings for this message. Security Settings  Do not AutoArchive this item  Voting and Tracking options  Voting and Tracking options  Version  Approve;Reject  Persion  Approve;Reject  Persion  Security Settings  Security Settings  Do not AutoArchive this item  Voting and Tracking options  Persion  Approve;Reject  Persion  Security Settings  Do not AutoArchive this item  None  Version  Security Settings  Change security settings for this message. Security Settings  Do not AutoArchive this item  Security Settings  Security Settings
	✓ Save copy of sent message         Contacts         Categories         ✓ None         Close

1. Select **Options, Use Voting Buttons, Custom** on the ribbon.



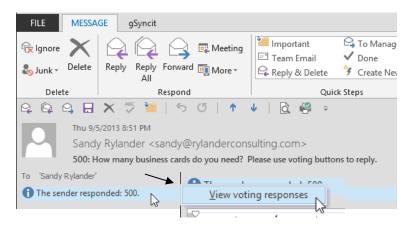
- 2. Select the text you wish to appear on the buttons from the Voting Options drop-down list. *If the desired text is not shown, type text desired for each button. Separate button text with semi-colons.*
- 3. The recipient will see this message:



4. Recipients will click on one of the options and this message will appear. They will select one of the options and click OK.

Microsoft Outlook ×
You have chosen to respond: 500.
<ul> <li><u>S</u>end the response now</li> <li><u>E</u>dit the response before sending</li> </ul>
OK Cancel

5. A message will then be sent back to you with their response. To view all the responses, click on the response and click View voting responses



6. The following screen displays a count of all responses in the top grey bar and shows each individual's response.

This message was sent on 9/5/2013 8:49 PM. Reply Totals: 500 1; 1000 0		
Recipient	Response	
'Sandy Rylander'		⊢ Individual response.
Sandra Rylander (sandy@rylanderconsulting.com)	500: 9/5/2013 8:51 PM	

#### **Delivery and Read Receipt**

A delivery receipt will send you when a message it is delivered to a recipient's mailbox where a read receipt is generated only when a message is opened or deleted by the recipient. The delivery receipt will say when a message is read, or if it has been deleted without being read. Be careful not to read too much into this. Someone can read a message in the reading pane and delete the message and it could send a message saying the message was deleted without being read. Conversely, a message can be opened, but the recipient may not have actually read it. The receipt cannot tell you whether the message has actually been read, only that it has been opened.

Request a Delivery Receipt	📡 🖆 🍇
Use Voting 🔄 Request a Read Receipt Buttons 👻	Save Sent Delay Direct Item To + Delivery Replies To
Tracking 5	More Options 🕞

#### **Direct Replies to**

Return messages are sent to other recipients in addition to yourself. Great to use if you are sending a message and know that you wish to have others receive the reply at the same time you do. Perhaps you are working together with others on a project, or perhaps you are going out-of-town and want someone else to handle the reply.

		Pro	perties			×
s i	mportance Normal Sensitivity Normal Do not AutoArchive thi d Tracking options Use voting buttons Request a delivery recei Request a read receipt	pt for this messa	Security S	curity setting	gs for this messa	ıge.
Delivery op	otions —					
0 <u>-</u> , [	<ul> <li>Have replies sent to</li> </ul>	Sandy Rylande	r < sandy@r	ylandercons	ulting.com>	Select Names
	Do not deliver before	None	~	12:00 AM	$\checkmark$	13
	Expires after	None	¥	12:00 AM	$\checkmark$	
	Save copy of sent messa	age				
Cont	acts					
Catego	ories 🔻 None					
						Close

#### **Delay Delivery**

Send an email now, but do not deliver before a specific date. Use this option if you are going out-oftown and want to have time to compose and send the message now, but don't want the message received until a future date.



#### Save a Message

Sometimes you may want to save the text part of an email.

Exercise:

- 1. Open the desired email.
- 2. Select File, Save As.

	Save As		×
🔄 🏵 🔹 ↑ 📑 ► Librarie	> Documents > V	C Search Documents	P
Organize 👻 New folder			0
<ul> <li>Recent places</li> <li>Templates</li> <li>Invoices</li> <li>Client Other</li> <li>Microsoft Office</li> <li>Sandys Programs and Ter</li> <li>SkyDrive</li> <li>Dropbox</li> <li>Libraries</li> <li>Documents</li> <li>Music</li> </ul>	<ul> <li>Name</li> <li>BUSINESS</li> <li>Office 2013</li> <li>PERSONAL</li> <li>Access</li> <li>Client Other</li> <li>Craigslist</li> <li>Excel</li> <li>Invoices</li> <li>OneNote</li> <li>Outlook</li> </ul>	*	~
File <u>n</u> ame: RE When y	ou return.msg		~
Save as <u>t</u> ype: Outlook M	ssage Format - Unicode (*.msg)		~
) Hide Folders	Too <u>l</u> s	s ▼ <u>S</u> ave Cancel	

- 3. When the Save As dialog box appears, **select the desired folder**, give the file a **descriptive file name** and click **Save**. Notice that the file is saved as a .msg, .txt or .htm(l) file.
- **Tip!** Saving a message as a .txt or .htm(I) file does NOT save the attachment. You can save attachments embedded in a message by saving a message as an .msg file. The disadvantage with using this technique is that you will not see the individual attachments when looking at a file list. You will have to remember which files are in which messages and then open the message to view the file attachments.

#### **Email Etiquette**

- 1. Do not use all CAPS in an email, it implies that you are shouting at the person.
- 2. When sending an email to more than one person outside your office, consider placing all names in the **BCC** area. BCC stands for Blind Carbon Copy, which means recipients cannot see each other's email addresses, nor do they know everyone to whom the message was sent.
- 3. If you are asking many questions, type each on its own numbered or bulleted line rather than including them all in one paragraph. You have a much better chance of getting answers to all of your questions this way.
- 4. Remember people cannot see your facial expressions or hear your inflection.

## **Automatic Replies (Out of Office)**

This option would appear on the File Info tab if this account was set up to work with Exchange. Here are the screens you would see with an Exchange account. Notice that you can set the time for the Automatic Replies to start and end! In addition, you can have 2 messages: Inside and Outside your Organization.

	Automatic Replies
Automatic Replies (Out of Office) Use automatic replies to notify others that you are out of office, on vacation, or not available to respond to e-mail messages.	<ul> <li>○ Do not send automatic replies</li> <li>④ Send automatic replies</li> <li>☑ Only send during this time range:</li> <li>Start time: Tue 10/16/2012 ▼</li> <li>8:00 PM ▼</li> </ul>
	End time: Wed 10/17/2012 • 7:00 PM •
	Automatically reply once for each sender with the following messages:
Automatically reply once for each sender with the following messages: Inside My Organization Tahoma 12 B <i>L</i> <u>U</u> <u>L</u> <u>L</u> <u>L</u> <u>L</u> <u>L</u> <u>L</u> <u>L</u> <u>L</u>	🚳 Inside My Organization 📿 Outside My Organization (On)
	Tahoma ▼ 12 ▼ B Z U ▲ 등 등 律 律
	I will be out of the office on Wedensday October 17, 2012. Please
	Rules OK Cancel

- Turn Out-of-Office Assistant On
  - 1. In Calendar view, select File, Out of Office Assistant on the menu bar.
  - 2. When the dialog box appears, type your **AutoReply** message and click the **I am currently Out of the Office** option button (when you are ready to leave). Click **OK**.



# **Manage Mailbox Size**

Mailbox size can quickly get out of control. The Mailbox cleanup option assists you with understanding the size of your folders and will help you find large and/or old items that you may wish to delete.

## Exercise:

- View your Mailbox Size
  - 1. Select File, Info, Cleanup Tools, Mailbox Cleanup

${}^{}$	Inbox - Sandy Portable - Out
Info	Account Information
Open & Export	Sandy@nylanderconsulting.com
Save As	
Save Attachments	Add Account
Print	Account and Social Network Settings Account Settings * Change settings for this account or set up more connections. Connect to social networks.
Office Account	
Options	Mailbox Cleanup Manage the size of your mailbox by emptying Deleted Items and archiving.
Exit	Cleanup Tools *
	Mailbox Cleanup Manage mailbox size with advanced tools.
	Empty Deleted Items Folder Permanently delete all items in the Deleted Items folder.
	Archive bled Add-ins
	Move old items to Archive Folders in the folder list. are affecting your Outlook experience.

2. Click View Mailbox Size. Click Close when done.

	Mailbox Cleanup	×
<b>Š</b>	You can use this tool to manage the size of your mi You can find types of items to delete or move, empt items folder, or you can have Outlook transfer item file. View Mailbox Size	ty the deleted
2	<ul> <li>○ Find items older than</li> <li>90</li></ul>	Find
	Clicking AutoArchive will move old items to the archive file on this computer. You can find these items under Archive Folders in the folder list.	AutoArchive
0	Emptying the deleted items folder permanently deletes those items. View Deleted Items Size	Empty
	Delete all alternate versions of items in your mailbox. View Conflicts Size	Delete
		Close

Fol	der Size		
Local Data			
Folder Name:		Sandy Porta	ble
Size (without subfolders):		C	кв
Total size (including subfolders):		928394	КВ
Subfolder	Size	Total Size	۸
Calendar	2945 KB	3564 KB	
Calendar\Backup	619 KB	619 KB	
Contacts	2406 KB	5583 KB	
Contacts\Backup Contacts	3177 KB	3177 KB	
Deleted Items	41852 KB	41852 KB	
Deleted Items\Penny	0 KB	0 KB	
Deleted Items\Gail	0 KB	0 KB	
Deleted Items\Julie	0 KB	0 KB	4
		Clos	e

#### Find Old/Large Items

- Select the **Find items older than** or the **Find items larger than** option button. 1. Fill in the days or size you with to find and click **Find**.
- 2. **Delete** any items you no longer need from the Advanced Find list. Click the **X** in the top right corner when done.

🖕 - Messages: A	dvanced - Advanced Find		X
<u> </u>	ew <u>T</u> ools		
Loo <u>k</u> for: Message	s 🔹 In: Per	sonal Folders	Browse
Messages More	Choices Advanced		Find Now
Search for the w	ord(s):		Stop
	In: subject field only		New Search
From Sent To	the only person on the To Time: none v any	line	
! 🍱 🗋 🖉 From	Subject	Recei Si Categ	In Folder 🛛 🕅 📥
🖂 🕖 San		Tue 1 2	Sent Items 🛛 🍸 🗖
	Emailing: BFM.dot	Tue 1 2	Deleted Items 🛛 🏹
	BFM.dot	Tue 1 2	Deleted Items 💝 Inbox 🍄 Inbox 🌣 Sent Items 🍄 Sent Items 🏹
🖂 🕖 Mer	YWCA Luncheon Committee M		Inbox 🕎
	Emailing: GBT	Mon 1	Inbox 🕎
	RE: Knowledge Anywhere Prop		Sent Items 🛛 🏹
	KAProposal.dot	Mon 1	
	GBT dot	Mon 1	Sent Items 🛛 🎔 🎽
175 Items			

## **Quick Steps**

Quick Steps allows you to consolidate multiple steps into one. It is a great way to boost efficiency and is located on the Home tab for Mail.



## **Multiple Exchange accounts**

Outlook 2013 supports up to 3 Exchange accounts within an Outlook profile. The Ribbon in Outlook 2013 is specific to the account at which you are looking. If you click New Email in the ribbon while looking at the Inbox of your second Exchange account, your new message will be sent from your second Exchange account.

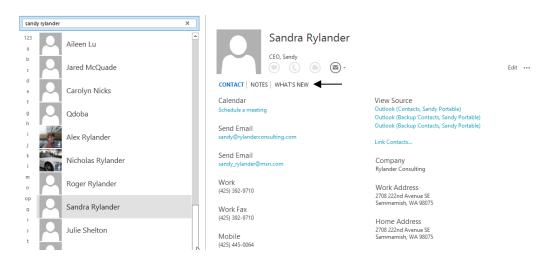


# **People - Contacts**

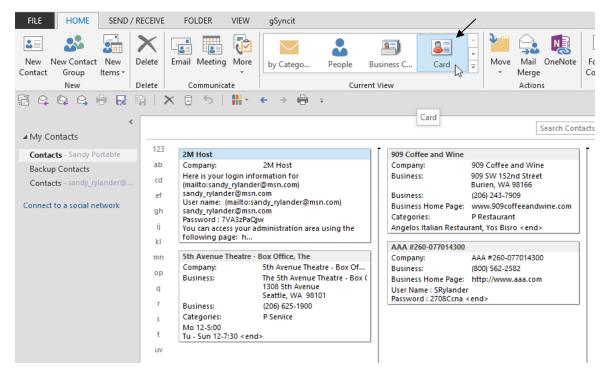
The People folder is where you store information about people with whom you communicate that are not already in the Global Address List (internal contacts). The notes area in the Contact form is great for tracking important conversations. The Categories box allows you to group contacts (i.e. clients, vendors, etc.).

## People Card offers streamlined View and Abilities to Connect - New in 2013

The People Card collects and displays contact information in one place: phone, email address, street address, company information, social media updates, even whether they're available. Here you can schedule a meeting or send an email. Notice the 3 different views: Contact, Notes and What's New (social media updates)



Note: Card View is still available to select from the Ribbon if you prefer that look.

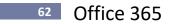


## **Create a Contact**

- **Create a Contact** 
  - 1. Select the **People** folder.
  - 2. When in Contact view, click the Home, New Contact tool.
  - 3. Type the person's full name in the Full Name box and press tab. Full name can include title (Mr./Mrs./Ms.), name (First/Middle/Last) and suffix (Jr./III).

FILE	HOME	SEN	ID / RECE	VE F	OLDER	VIEW	gSyr	ncit								
New Contae		New Items			I Meeting	*	by C	atego	Peo	ple B Curren	usiness C	Card	Move	Mail Merge Action		Forwa
Fil	E CONTA		↓ ÷ INSERT	FOR	MAT TEXT	RE	VIEW	Untitled · gSynci	1.	t				? [	<b>五</b>	×
Save Clos	& Delete	orward		General	E Details Certific	ates	Email I	Meeting	More V		s Check Names	Business Picture Card •	Follo	w Up -	Zoom	
	Actions				Show		Co	mmunicat	e	Na	ames	Options	Ta	gs	Zoom	~
J F Inter	Full Name Company ob title ile as net E-mail	•														
	)isplay as										Notes		-	-		
v	Veb page addres	s									<u> </u>	1	. 2	3 .	4	
1 1	M address															
Phor	ne numbers															
	Business	-														
	Home	-														
	Business Fax	-														
	Mobile	-														
																^

- 4. Click the Full Name button. Click OK if everything looks correct. This displays how Outlook automatically separates names into first name, last name etc.
- 5. Type Job Title and press tab.
- 6. Type **Company** name and press **tab**.
- 7. The File As is already selected so press tab twice. File As determines where this entry will appear in an alphabetical list of contact names.
- 8. Type each Phone number desired. Press tab to go forward box to box and shift + tab to go back box to box.



**Tip!** When typing phone numbers, you do not need to type the parentheses or the dash, Outlook will do that for you. Also, if the phone number has the same area code as your default area code, Outlook will automatically enter that as well. Outlook asks you to type your default area code when you add your first contact. If your default area code is incorrect, use the following instructions to change it.

To change the default area code, if it is not correct:

- 1. Select **Start** on the Task bar.
- 2. Select Control Panel.
- 3. Double click Phone and Modem Options, then select Edit.

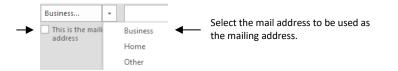
S Phone and Moder	n	×
Dialing Rules Modems Advanced		
The list below displays the locations you location from which you are dialing.	have specified. Select th	ne
	Area Code	
My Location	425	
<u>N</u> ew <u>E</u>	dit <u>D</u> elete	
ОК	Cancel Apply	

- 4. Type the correct **Area Code** in the Area Code box.
- 5. Click **OK** twice.

To type or view phone numbers other than the four displayed, click the drop-down arrow to the right of the phone number. Notice there are 19 phone number fields for your use. Also notice that phone numbers that have been entered have a checkmark by them.

			Assistant		
		~	Business		A checkmark shows a phone numbe
			Business 2	hì	has been entered for that field.
			Business Fax		
			Callback		
Ph	one numbers		Car		
	Business		Company		
	Home	1	Home		
	Business Fax	1	Home 2		
		-	Home Fax		
	Mobile		ISDN		
			Mobile		
			Other		
			Other Fax		
			Pager		
			Primary		
			Radio		
			Telex		
			TTY/TDD		

9. Enter up to **3 addresses.** First selecting the address you wish to enter from the address dropdown list, and then typing the address. If you enter more than one address, be sure to check which address you wish to be the mailing address.



- **Tip!** When there is a P.O. Box, consider using the Business or Home address, whichever is appropriate, for the mailing address (i.e. P.O. Box) and the Other address for the street address.
- 10. Enter up to **3 email addresses**. First select which email address you wish to enter from the dropdown list (Email, Email 2, or Email 3), then type the email address.



**Tip!** Try to be consistent with how you enter email addresses. If you only have one email, enter it in the email address. If you have more than one, enter the business email in Email and home email in Email 2 etc.

# <sup>64</sup> Office 365

- 11. Enter Web page address if desired. This address will turn blue and link to the internet if it is clicked and you are connected to the internet.
- 12. Type notes in the large notes area if desired.
  - **Tip!** This is a great place to keep notes on important conversations. Type the date and your initials (if this contact is shared) and type in the message. Put messages in reverse chronological order as shown below.

≝ <b>: 5 (5 ↑ ↓</b>	Ŧ	Steve Abramavage	e - Contact		?	<b>A</b> - <b>D X</b>
FILE CONTACT INS	ERT FORMAT TEXT	REVIEW gSyncit				
Save & Delete Close	<ul> <li>▼ Details</li> <li>♀ Certificates</li> <li>➡ All Fields</li> </ul>	Email Meeting More	Address Check Book Names	Business Picture Card •	Categorize Follow Pri v Up v	ivate Zoom
Actions	Show	Communicate	Names	Options	Tags	Zoom 🔺
P Service						
Company Term Job title Pest	e Abramavage ninators : Control amavage, Steve			Termin Pest C		
Internet						
Display as Web page address			Notes	1	2 · · · 1 · · · 3 · · · 1 ·	••• 4 • • • 1 • • 2
IM address			Jeannin Craig die	e refer d pest control		
	) 823-8351			No	otes area.	
Home						
Business Fax 🝷						
						^

13. Click Details to add additional information like birthday, etc.

≝ 🖬 ⁵ ↺ ↑ ↓ ÷	Steve A	bramavage - Cor	tact			? 🖻 –	□ ×
FILE CONTACT INSERT FORM	AT TEXT REVIEW gSyr	ncit					
Save & Delete	Details Certificates All Fields		ess Check Bus	siness Picture	Categorize Follow v Up v	Private Zoon	n
Actions	Show Communi	cate	lames	Options	Tags	Zoon	1 ^
Departm <u>e</u> nt	Mana <u>g</u> er's name						
Offi <u>c</u> e	Assistant's na <u>m</u> e						
Profession							
Nickname	Spouse/Partner						
Tiţle	- <u>B</u> irthday	None					
Suffix	+ Anniversary	None					
Internet Free-Busy							
Address							

14. Click Save and Close.

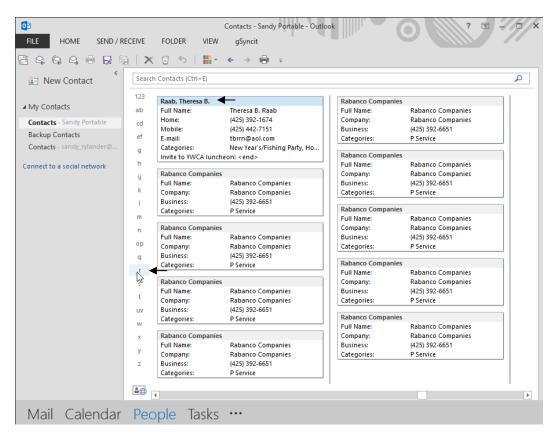
The new Contact has been created.

## Find a Contact

There are two ways in Address Cards View to find a contact using the File As field (usually the person's last name): 1) use the Alphabetical Index on the left side of the screen or 2) click the name of a contact and start typing the last name of the person you would like to find.

To find contacts by any information in their contact record you must use the Find tool.

- Find a Contact in Address Card View Using the Alphabetical Index
  - 1. Click the **R** on the alphabet on the left side of the screen You may have to use the horizontal scroll bar at the bottom of the screen to move right if the name does not appear.



<sup>66</sup> Office 365

- Find a Contact by Clicking on a name and Typing the Last name
  - 1. Click a name and then start typing the last name of the person you wish to find. *Outlook goes to that name.*

Full Name:     Alex Rylander       Home:     Perham Hall - Room 604       1624 NE Colorado Street     Pullman, WA 99163       Other:     Perham Hall - Room 604       PO Box 1700     Pullman, WA 99163       Mobile:     (425) 623-3515       E-mail:     alextvzr1@gmail.com       Categories:     Holiday Cards, P Family Sandy	Full Name: Business: E-mail: Categories: Eng 55: 9654823 Eng 57: 9654831	Nicholas Rylander 2708 222nd Avenue SE Sammamish, WA 98075 (425) 457-9240 nickrylander@gmail.com Holiday Cards, P Family Sand
1624 NE Colorado Street Pullman, WA 99163 Other: Perham Hall - Room 604 PO Box 1700 Pullman, WA 99163 Mobile: (425) 623-3515 E-mail: alexhyzr1@gmail.com	Mobile: E-mail: Categories: Eng 55: 9654823	Sammamish, WA 98075 (425) 457-9240 nickrylander@gmail.com Holiday Cards, P Family Sand
Other: Perham Hall - Room 604 PO Box 1700 Pullman, WA 99163 Mobile: (425) 623-3515 -mail: alexhvzr1@gmail.com	E-mail: Categories: Eng 55: 9654823	nickrylander@gmail.com Holiday Cards, P Family Sand
PO Box 1700 Pullman, WA 99163 10bile: (425) 623-3515 -mail: alexhvzr1@gmail.com	Categories: Eng 55: 9654823	Holiday Cards, P Family Sand
Pullman, WA 99163 obile: (425) 623-3515 nail: alexhvzr1@gmail.com	Eng 55: 9654823	
bile: (425) 623-3515 ail: alexhvzr1@gmail.com		
nail: alexhvzr1@gmail.com	Eng 57: 9654831	
	000 014 0021 HC	code 480-500 Cody and Angelina
		Devin Cunningham and Jessica (2)
3/49 leg WSU student ld 11255037 Alex's locker :k 8-30-16 < end>	Miyazaki - no	Sullivan - no 894-6197 Layne
Rylander, Eric & Suzanne	Rylander, Nick &	
ull Name: Eric & Suzanne Rylander	Full Name:	Nick & Robin Rylander
Business: 1203 Windsor Drive	Home:	3722 East 103rd Street
Wilmington, NC 28403	Home:	Tulsa, OK 74137
usiness: (404) 676-7210	Fome: E-mail:	(918) 296-3560 landerfield@cox.net
ome: (404) 874-6275		
tobile: (910) 232-2302	E-mail 2:	nrylander@eastcoastenterta.
Categories: P Family Roger, Holiday Cards	Categories:	P Family Roger, Holiday Card 4) 815-4653 Landerfield

Click a name and type the last name of the desired person (if that is the File As). For example, start typing **Ryl** and you will see Outlook go to names starting with Ryl.

- Find a Contact using the Search Tool
  - 1. Start typing "Rylander" name in the search box.

Ballard, Andrea		Basuel, Jean	
Full Name:	Andrea Ballard	Full Name:	Jean Basuel
Job Title:	Owner	Company:	Lorig Associates, L.L.C.
Company: Mobile:	Expecting Change LLC (206) 794-3958	Business:	Market Place Tower 2025 First Avenue, #420 Seattle, WA 98121-2176
E-mail: Business Home Pag	andrea@topnetwork.com e: http://www.google.com/pro	Business: Home:	(206) 727-2395 (425) 357-6367
From: Andrea Balla	rd <andrea@topnetwork.com> ch 19, 2012 9:55 AM</andrea@topnetwork.com>	Business Fax: Categories:	f(206) 728-5847 Holiday Cards, YWCA Lunche
	/ network on LinkedIn Hi Sandy,		/l - Sandy <mark>Ryla</mark> nder: called re
you to WKG and ho	r from you! I was happy to refer ope you	programming and entrance on Leno	Office XP training. Parking ra < end>

2. Notice that only contacts with Rylander are displayed and the search characters are displayed in yellow.

You can search on any information in the Client's record, including the Notes field.

- 3. Click the **"X"** at the right of the search box to view all Contacts.
- 4. **Double click the contact's name** to open the contact item and view additional contact information. Click **Save and Close** when done.

## **Edit Contacts**

Add or change contact information by double clicking the Contact to open the Contact card. . Click **Save and Close** when done.

## Categories

Categories are a great way to group Contacts. You can assign as many Categories as you wish to a Contact. For instance you can assign a Contact to the Client and Holiday Card categories, or the Vendor Category. Outlook provides a master category list with several categories already created. You can choose to use these categories or delete them and create your own. You can view your Contacts by Category to quickly look at Contacts that belong to a certain group.

#### Exercise:

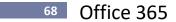
Display Category View

FILE HOME SEND / R	ECEIVE FOLDER VIEW gSyncit
Contact Group Items • New D	Nelete     Image: Communicate     Image: Communicate
≺ ∡ My Contacts	다) (이 FULL NAME E-MAIL ▲ JOB TITLE COMPA
Contacts - Sandy Portable Backup Contacts	Click here to add a new
Contacts - sandy_rylander@	Categories: (none): 43 item(s) Categories: B Client: 77 item(s)
Connect to a social network	Categories: B L Client: 63 item(s)
	Categories: B Services: 16 item(s)
	Categories: B Subcontractor: 6 item(s)
	Categories: Dreamweaver: 1 item(s)
	Categories: Holiday Cards: 180 item(s)
	Categories: Holiday Cards - E-mail: 1 item(s)
	Categories: New Year's/Fishing Party: 77 item(s)
	Categories: P Activity Tennis: 1 item(s)
	Categories: P Activity Walk: 11 item(s)
	Categories: P Babysitter: 2 item(s)
	Categories: P Doctor: 13 item(s)
	Categories: P Family Roger: 7 item(s)
	Categories: P Family Sandy: 21 item(s)
	Categories: P Friend: 112 item(s)

1. Click By Category to display Contacts grouped by Category.

#### 2. Click the arrow to expand or collapse the group.





- Add Categories to a Contact
  - 1. **Double click a Contact** to open the record.

E S C ↑ FILE CONTACT	↓ = INSERT FORMATTEXT F	Mark Buick - C REVIEW gSyncit	ontact		Ð	? 📧 .	- 🗆 ×
Save & Delete Close	New • Details • General Certificates	Email Meeting More	Address Check Book Names	Card 👻	Ť	Up≖	Q Zoom
Actions	Show	Communicate	Names	Options	I	All Categories	om A
B Client Full Name	Mark Buick			Mark I	**Cal	I	
Company	Responza			Respon Director	_	rk To-Do	
Job title	Director of Sales			(206) 76			
File as	Buick, Mark	•		(425) 94 655 Sou Seattle,	B Sen		
Internet				http://w		contractor	
E-mail 👻					Holid	lay Card	
Display as			Notes		Holid	lay Card - Business	_
Web page address	http://www.responza.com				📕 Impo	rtant	1
IM address					New	Year's/Fishing Party	r
Phone numbers					P Act	ivity Tennis	
Business 👻	(206) 762-5100 ,117				P Act	ivity Walk	
Home +					P Frie	end	
Puripage Eav					P Rer	ter Seaside	
Business Fax 🝷					All Ca	ategories	

- 2. Click **Categorize in the Contact tab** to display the Categories list. *Your list may appear differently.*
- 3. Click **All Categories** at the bottom of the Categorize list to check as many Categories as desired for a contact and click **OK**.

	Color Categories		×
To assign Color Categories to the each category. To edit a category, right.			
Name	Shortcut key	<b>^</b>	<u>N</u> ew
		Color Short (Nor	icut Key: ne) V
	C	Ж	Cancel

Tip! If the categories you need are not displayed, create your own, and/or delete existing ones.

## Add/Delete Categories from the Color Categories List

It is very easy to add or delete categories from the Color Categories List. Adding or deleting items from this list DOES NOT add or delete them from your Contacts. This list is simply makes the Categories available to be chosen for Contacts when you add or edit them.

- 1. Open a Contact and click Categorize and select All Categories.
- 2. Click New and Type **B-Accounting Client** in the **Name** box. Categories are always sorted alphabetically, so if you want all your business contacts together, you may wish to add a "B" to the front of each business contact category.
- 3. Select a color and Shortcut Key (optional).

ght. Name	onal To-Do	Shortcut key "	New
**Call	Add New Cate	egory 📐 🗙	Rename Delete
B Clien B L Cli B Serv B Sub	Name: B Accounting Client Color: Shortcut k	(None) V Cancel	Color: Shortcut Key: (None)
Holida	ear's/Fishing Party		

4. Click OK.

Adds the Category to the list. Adding the Category to the Master Category List does not apply this Category to the current Contact. To do that, you must check the appropriate boxes on the Category list.

- 5. Continue to add as many Categories as you want.
- 6. Delete a Category by selecting the category to be deleted and click **Delete**.
- 7. Click **OK** when done.



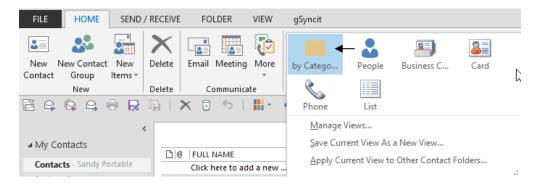
## **Contact Views**

There are a variety of ways to display contacts. Click all Current View buttons to see what is available. Learn to customize a view in the following section.

Exercise:

## Display Different Contact Views

1. Try selecting some different views.



#### 2. Click the List option button.

Displays all Contacts in table view, sorted A to Z by the Full Name or File As field.

03			Contacts - Sandy Portable - (
FILE HOME SEND / F	RECEIVE FOLDER VIEV	V gSyncit	
New New Contact New Contact Group Items -	Delete Email Meeting Mo		▲ ▼ ▼ ₩Ove
New	Delete Communicate	Current View	
S C C C B B R C ✓ My Contacts	à × ◙ ≶   ₩·	· € → 🖶 ∓	The up arrow indicates that this view is sorted by File As ascending (A to Z). To sort
Contacts - Sandy Portable	Click here to add a n	JOB TITLE COMPANY F	by another field, click that field's heading.
Backup Contacts Contacts - sandy_rylander@ Connect to a social network	Adele & Byron Piro       Aidan Wilson       Aileen Lu       Alain Orozco       Alex Dutra	Sr. Financial UW Medicine No L Broker - Ma Merrill Lynch	To change the sort order from Ascending to Descending, simply click the heading a second time.

#### **Customizing Views**

There may be times where you wish to add fields to a view, remove fields from a view or move or copy fields.

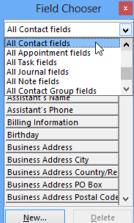
Exercise:

- Add Fields (for viewing or sorting) using Field Chooser.
  - 1. Select any Table View (i.e. List View)

					Search C	Contacts (Ctrl+E)	
00	FULL NAME	JOB TITLE	COMPANY	FILE AS	E-MAIL	COUNTRY/REGION	DEPARTMENT
	Click here to add a ne	w					
8=	Adele & Byron Piro			Piro, Adele & Byron	adelepiro@mac	com	
8≡	Aidan Wilson			Wilson, Aidan			
<b>2</b> =	Aileen Lu	Sr. Financial	UW Medicine No	Lu, Aileen	aileenlu@hotma	ail.com	

2. Right click any column heading (i.e. Company) and select Field Chooser.

00	FULL NAME	10		,
	Click here to add a new	G	<u>A</u> rrange By	F
2=	Adele & Byron Piro	ÎÎ↓	<u>R</u> everse Sort	
8≡	Aidan Wilson		Field Chooser	
<b>≗</b> ≡	Aileen Lu Alain Orozco		Remove This Column	
2=	Alex Dutra	2	<u>G</u> roup By This Field	
2=	Alex Rylander	_	Group <u>b</u> y Box	
<b>≗</b> ≡	Alice Heimbeck Alice Truan	*	<u>V</u> iew Settings	



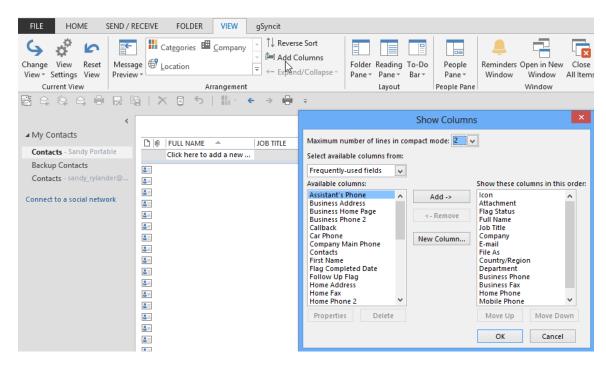
3. Drag a field to the heading area. Drop it when the two red arrows appear.

8	Contacts				Se		<u>N</u> ew	<u>D</u> elete
00	Full Name	E-mail	File As 🔺	Busines	s Pho	)		
	Click here to add a new Cont	act 🕇 🗟						
8	Kristi (12)		(12), Kristi	4252813	3414			
8=	Danielle :)		:), Danielle	Field Chooser		Cli	ick when done to	close.
8=	Sabrina 2		2, Sabrina	E-mail fields	-			
8=		2M Host	2M Host	E-mail				
8=		5th Avenue Thea	5th Avenue T	E-mail 2	l þ			
8=	Cheyne A		A, Cheyne	E-mail 3				
8=		AAA #260-07701		Email Address Type	8	-		
8=	Ms. Joy & Derek Abbott and		Abbott and F	E-mail Display As				
8=	Steve Abramavage	Terminators	Abramavage,	Email2 Address Type	1			
8=	Hesham Abu-El-Ata	Symantec Corpo		E-mail2 Display As				
8=	Lynn Abulhosn	Unico Properties		Email3 Address Type	1 1			
8=		Accelnet.net	Accelnet.net	E-mail3 Display As	5			
8=	Admin	Microsoft	Admin	IM Address				
8=		Adobe	Adobe		1			
8=		Adventure Bowli			-			
8=		Alaska Airlines	Alaska Airline	New Delete	P			
8=	Dana and Alan Aldred	Click2learn	Aldred, Dana	Delete				

- 4. If the field you need is not displayed, **click the down arrow to the right of the Frequently used combo box** to display other groups of fields.
- 5. Add several fields if desired.
- 6. Close the field chooser by clicking on the **X** in the upper right-hand corner. *Fields will remain on this view until removed.*



- Add Fields (for viewing or sorting) using Add Columns on the View tab.
  - 1. Select Add Columns on the View tab.



#### **View Tab**

The View tab now makes it easy to customize views.

FILE	HON	ΛE	SEND / REC	EIVE FOLDE	R VII	IEW	gSyncit							
Generation Change View ▼ S	View Settings	<b>K</b> eset View		Cat <u>e</u> gories	E Com	npany		Folder Pane •	Reading Pane •	To-Do Bar •	People Pane •	eminders Window	Open in New Window	Close All Items
Cur	rent Viev	v			Arrang	jement			Layout		People Pane		Window	

#### Remove Fields from View

Removing a field from view does NOT delete the field. It can be added at any time.

1. **Dragging field down off the heading bar** until an **X** is displayed, or right click on the heading and select Remove This Column.

FULL NAME	JOB TITLE	COMPANY	E-MAIL
Click here to add a new			$\sim$
		DSC Power832 Al	DSC Pow

#### Sort Fields

1. Sort any of the displayed columns simply **by clicking on the column heading**. *Click to sort ascending and again to sort descending.* 



- Size Fields (Wider or Narrower)
  - Change the Width of a column by pointing to the right border (your mouse should look like this ↔) and dragging the line to the desired width; or
  - 2. Double clicking to best fit a column.

E-MAIL	FILE AS	÷	-



#### **Print Contacts**

Contacts will print exactly as they appear on the screen.

- If a field isn't displayed it won't print.
- If a contact isn't displayed, it won't print.
- If you are in address cards view, contacts will pint in Address Card style.
- If Contacts are in a table view, they will print in table view. If their field width is too great for the paper size, it will print on a second sheet.
- If you want to print just a certain selection or contacts, select the contacts first and then print.

#### Exercise:

- Print All Contacts for One Location in by Location View
  - 1. Select the desired rows: click on the top row and shift click on the bottom row.
  - 2. Click the Print tool, select Table Style and select Print Options.

${ \biselineskip}$		Contacts - Sandy Portable - Outlook	uli , IIII - G
Info	Print		
Open & Export	Specify how you want the item to be printed and	Print	×
Save As	item to be printed and then click Print.	Name: EPSON Remote Print(WF-3540) V Propert	Stemit Fresh Fruit
Save Attachments		Status: Type: EPSON Remote Print Where: Print t	Porture Name Creat Drived Agricuits ANF Sun Virtualmes O file (R. Portin 1-10202) Virtual Theorem 1-10202
Print	Printer  EPSON Remote Print(WF-35	Comment: Print style Copies	Pomeganala Batro Hota Moneco Pruta and Vegetala e Giorga Deer
Office Account	Ready	Table Style         Page Setup         Number of pages:         All           Number of copies:         1	Bang Been Bang Been Meto Tonst - Bu Desc Oters Units Harras # 75541362
Options	Settings	Memo Style Define Styles	A statu Antone A driven Love Ecolog Center Frit Agglance Crobery Stores Amagen Restrict Form - Senti Lyti.
Exit	Table Style	Page range	RG Barribetto Viegeto Peter - 573 O 0926 Sanada
	Memo Style	All     Pages: Type page numbers and/or page ranges separated by	Valantes Department of Temper. Facility - Temper Renations Of Creations Of Creations Addee
		commas counting from the start of the item. For example, type 1, 3 or 5-12. Print range	2M Head Uppomena 223-002-4 714 Pogisha Whote Roods Markani
		All rows     Qonly selected rows	Servers Horter & Carl - 310321 900 Chiller and Viller Control Reat United State Read Office Mental Provided Station Despite 1 Mit State Carl
		Print Preview Car	Pressne Pressne Press Haan Benturient Presity Investments Andre Schermerts Bisk sola Combinations Bisk sola Combinations
		I Hand I G	Correst +0.00222020 0000720

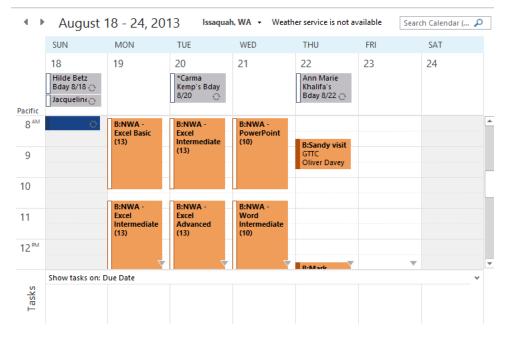
3. Select Only selected rows and click Print.

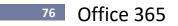
# Calendar

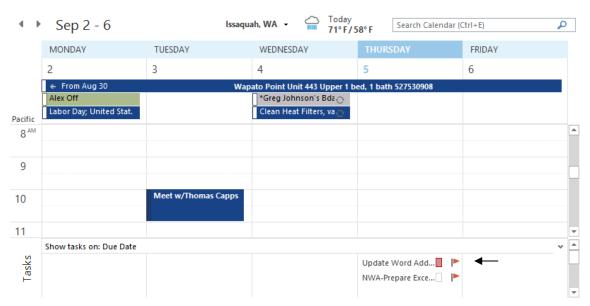
## **Calendar Views**

Day View	with Tasks Go	o Tod	ау	
	FILE HOME SEND / F New New New Appointment Meeting Items ~ New	Today Ne	Calendar - Sandy Portable - Outlook       FOLDER     VIEW     gSyncit       Bay     Week     Month       Day     Work     Schedule View       Arrange     G       Manage Galendars     Share       Find	
Navigate to 🔸	September 2013            SU MO TU WE TH FR SA         52 26 27 28 29 30 31	• •	September 7, 2013 Issaquah, WA • Weather service is not available Search Calendar (Ctrl P SATURDAY	- Search
different dates	1         2         3         4         5         6         7           8         9         10         11         12         13         14           15         16         17         18         19         20         21           22         23         24         25         26         27         28	Pacific 8 <sup>AM</sup>	7 Alaska flight #742 8:30-4:10 pm 26CD to Atlanta IYWNJM	H All Day Events
	29 30 1 2 3 4 5	9		
	Calendar - Sandy Por Backup Calendar - sandy_ryla US Holidays	10 11		
		12 <sup>™</sup>		
		1		
		Tasks	Show tasks on: Due Date     Start Date     Due Date     Reminder Time       Update Word Add-In Templates for Unico Bellevue     Wed 7/10/2013     Wed 7/10/2013     None       NWA-Prepare Excel Macros Class     Thu 8/8/2013     Thu 8/8/2013     None	— Tasks Due
	Mail Calendar	Pec	ople Tasks ····	
	ITEMS: 1 🐥 REMINDERS: 8		Task Pane	

#### Week View with Tasks







#### Work Week View with Tasks

#### Month View – High Detail

Aug	ust 2013	lssaquah, W/	Veather serv	vice is not available	Search Calend	dar (Ctrl+E) 🛛 🔎
SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
Jul 28	29	30	31	Aug 1	2	3
B:Leave for P 7:00am Chan	1866 436-5701 8:35am B:N	1866 436-5701 1866 436-5701	Claire van Z Carole van Z	Call RCI re o Check for Le	*Greg Hardm *Stephen Ryl	
4	5	6	7	8	9	10
Clean Heat F	8:05am B:N	8:05am B:N	8:05am B:N	Kevin & Peg	*Leah Villar's	Tom Kemp's
7:00am Chan	10:45am B:N	10:45am B:N	10:45am B:N	8:05am B:N	8:05am B:N	6:00pm Conc
11	12	13	14	15	16	17
7:00am Chan	*Shelley Ros	8:05am B:N	Audrey & Tin	*Kristi van Zu	8:05am B:N	12:00pm Nickerson
10:30am js m	Audrey & Tin	10:45am B:N	8:05am B:N	Alex's Health	10:45am B:N	Street Ale Ho
18	19	20	21	22	23	24
Hilde Betz B	8:05am B:N	*Carma Kem	8:05am B:N	Ann Marie K	2:00pm Dr. L	
Jacqueline D	10:45am B:N	8:05am B:N	10:45am B:N	8:45am B:Sa	6:00pm Dinn	
25	26	27	28	29	30	31
7:00am Channel 7 - Sunday Mor	Call USAA Check for Cit	Star Dash en. 9:00am B:S&B	9:00am B: Un 12:00pm Nic	9:00am B: G 2:00pm B:Ma	Wapato Point Un	it 443 Upper 1 I → Judy Vander

#### Schedule View

This is a great new view for viewing your calendar as well as groups of calendars. Select **Schedule View** on the Home tab.

▲ Marcl	h 27 - A	pril 02, 2011				Search (	Calendar (Ctrl+E)	م
	9 am	10 00	11 00	12 p	m	100	2 00	30
	Thursday, N	Narch 31, 2011						
Calendar			B:Fisherm Terminal at TOC 20 285-2400,	- Theone 6,				
Sandy's calendar								
Court								
🛍 Add a Cal	•							

# Weather – New in 2013.

A three-day forecast appears above your calendar. You can change the city and state displayed. Hovering over the forecast will provide even more information as shown below.

Issaquah, WA	- 🔆 Toda 80° F	y Tomorri 756°F * 80°F/5	
*	60° F Clear as of 7:19 AM	Wind: 0 mph Humidity: 86% Precipitation: 0%	URSDAY an Heat Filters, vacu
Data provided	by iMan	See more online	ependence Day; Unit

# Sharing – New in 2013.

You can share your calendar directly from the interface on Outlook using the Home tab on the Ribbon.

	FILE HOME	SEND /	RECEIVE	FOLDER	VIE	N gS	yncit								$\checkmark$		
	III 🐺										+					20	Search People
New New New Lync Today Next 7 Day Work Week Month Schedule Open Calendar E-mail Share Publish Calendar	New New	New	New Lync	Today	Next 7	Day	Work	Week	Month	Schedule	Open	Calendar	E-mail	Share	Publish	Calendar	
Appointment Meeting Items * Meeting Days Week View Calendar * Groups * Calendar Calendar Online * Permissions	Appointment Meeting	) Items *	Meeting		Days		Week			View	Calendar	<ul> <li>Groups -</li> </ul>	Calendar	Calenda	Online *	Permissions	
New Lync Meeting Go To 🕫 Arrange 🕫 Manage Calendars Share Find	New		Lync Meeting	Go T	o G			Arrange		E.	Manage	Calendars		5	hare		Find

## **Create an Appointment in Day View**

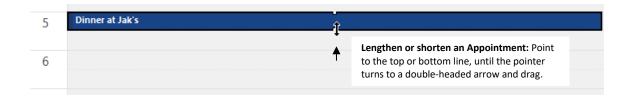
#### Exercise:

- Create an Appointment in Day View
  - 1. Drag from 5-7 p.m. to create a one-hour appointment. Type Dinner at Jak's and press ENTER; or

5	Dinner at Jak's
6	

# 78 Office 365

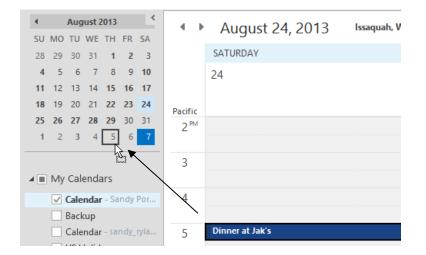
2. Click in the 5:00 time slot, type Dinner at Jacobi's and then lenthen or shorten the appointment by dragging its top or bottom line.



#### Move/Copy an Appointment in Day View

## Exercise:

- Move an Appointment
  - 1. Drag the appointment to a new time slot on the same date; or
  - 2. Drag it to the Calendar navigator to move to a new date.



## Copy an Appointment

 Drag the appointment with the right mouse button to a new time slot on the same date or to the Calendar navigator to move to a new date. When you drop the appointment, a shortcut menu will appear asking if you want to move or copy the appointment. Select Copy. You can also hold the Ctrl key down while dragging with the left mouse button to copy.



## Create an Appointment in Week or Month View

#### Exercise:

- Create an Appointment in Month View
  - 1. Right click the desired date and select New Appointment.

SUNDAY	MONE	YAQ	TUESDAY	WEDN	ESDAY	THURSDAY	FRIDAY	SATURDAY
Sep 1	2		3	4		5	6	7
🗧 From Aug	30		Wapato Point Unit	443 Uppe	r 1 bed, 1	bath 527530908		Alaska flight
Check for Le	Labor	Day; l	J 10:00am Mee	*Greg J	ohns			#742 8:30-4:10 pm 26CD to
8	9		10	11		12	13	14
		Ci	ay and John			Julie w/Mama		
7:00am Chan			Roswita Betz		Hilto	n Head - The Carol	ina Club #52770241	0 \$99
15	16		<u>N</u> ew Appointment	5		19	20	21
			New All Day Event				20	21
Hilton Head - 1	arleston - La	<b>1</b> 20	New Meeting Reguest		gton		Olney	
Cna	Tarieston - La	5	New Recurring Appoin	tment				
22	23		New Recurring Event			26	27	28
Olney	Call Ca		New Recurring Meetin	g	227284	48 hour cancellatio	n Charlesmark Hote	l \$239/night conf.
Phil	adelphia - 3	•	T <u>o</u> day			Check for Cit	Julie w/Mama	Alaska flight
29	30		Go to Date			3	4	5
*Haidn Foste		٠	<u>C</u> olor	÷		1:30pm 5th	Clean Heat	*Jeannine
7:00am Chan			<u>C</u> alendar Options			Avenue - Second Han	Filters, vacume refrig	Ryan's Bday 10/5
	*		View Settings					

2. Type the Lunch with Cay in the Subject box.

			Untit	led - Appoin	tment		? 📧	- 🗆 X
FILE	APPOINTMENT	INSERT FOR	MAT TEXT REVI	EW gSy	ncit			
Close	e Copy to My Calendar	Show		Invite Attendees Attendees	Eusy		Categorize	Zoom A
🗄 🅤 d	^ ↓ ⊕	Ŧ			Reminder	drop-down		
Subject	Lunch with Cay							
Locat <u>i</u> on								-
Start time	Mon 9/9/2013	0	8:00 AM	- All da	ay e <u>v</u> ent			
En <u>d</u> time	Mon 9/9/2013		8:30 AM	•				
8	• 1 • • • • • • • 2 •		4 5		5 • • • 1 • • • 7 • •	8	9 • • • • • • • 10 •	

- 3. Type the desired start time in the **Start Time** box, or select it from the drop-down.
- 4. Type the desired end time in the **End Time** box or select it from the drop-down.
- 5. If you want an alarm, click the **Reminder** drop-down and set the appropriate advance time for the reminder (i.e. 15 minutes, 30 minutes, 1 day etc.). Save and Close when done.



# Move/Copy Appointments in Week/Month View

#### Exercise:

- Move an Appointment
  - 1. Drag to new location.
- Copy an Appointment
  - 1. **Right drag** to new location and select Copy; or **hold the Ctrl key down and drag with your left mouse button** (be sure to let go of the mouse before letting go of the Ctrl key!

#### **Edit an Appointment**

#### Exercise:

- Edit an Appointment and Make it Private
  - 1. Double click an appointment to open and edit it.

#### **Delete Appointments**

#### Exercise:

- Delete an Appointment
  - 1. Click the appointment and click the **Delete** on the toolbar to delete; or
  - 2. Right click the appointment and select **Delete.**

## **Find Next/Previous Appointment**



# **Search for Appointments**

#### Exercise:

## Search for an Appointment

1. Click in the Search Calendar box. Type the search text.

<ul> <li>Sept</li> </ul>	tember 201	3 Issaquah, V	WA 👻 Weather s	ervice is not availab	le	Search Cale	endar (Ctrl+E)	<b>*</b> -
SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDA	Y B	SATURDAY	
Sep 1	2	3	4	5	6		7	
← From Aug 30 Check for Le	Labor Day; U	Wapato Point Unit 10:00am Mee	443 Upper 1 bed, 1 *Greg Johns	bath 527530908			Alaska flight #742 8:30-4:10 pm 26CD to	

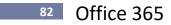
						nwa			×
00	SUBJECT	LOCATI	START	*	END	REC	URRENCE PATTERN	CATEG	ories 🖑
4	Recurrence: (none): 30 i	tem(s)							Close Search
	B: <mark>NWA</mark> - OneNote		Thu 8/8/	2013 8	Thu 8/8/201	3 1			
•	B: <mark>NWA</mark> - Word Bas		Thu 8/8/	2013 1	Thu 8/8/201	3 1:			
0	B: <mark>NWA</mark> - Word Bas		Thu 8/8/	2013 1	Thu 8/8/201	3 4:			
•	B: <mark>NWA</mark> - Word Int		Fri 8/9/2	013 8:	Fri 8/9/2013	10:			
•	B: <mark>NWA</mark> - Word Int		Fri 8/9/2	013 10	Fri 8/9/2013	1:0			
•	B: <mark>NWA</mark> - Word Int		Fri 8/9/2	013 1:	Fri 8/9/2013	4:0			

2. Click **the "X"** to see all appointments.

# See Hidden Appointments - due to lack of space

1. Click the yellow arrow to go to day view and view all appointments.

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	
Sep 1	2	3	4	
🗧 From Aug 30		443 Upper 1 bed, 1 l		
Check for Le	Labor Day; U	10:00am Me	sGreg Johns	Additional appointments cannot
8	9	10 Click for mor	e appointments.	be seen due to lack of space. Click the yellow arrow to go to day view and view all appointments.



#### **Recurring Appointments**

Recurring appointments are appointments that happen on a regular basis.

#### Exercise:

- Create a Recurring Appointment
  - 1. Click on the appointment and click the **Recurrence** tool on the Appointment Series tab.

Calenda	r - Sandy Portable - C	Jutlook	CALENDAR TOOLS
FILE HOME SEND /	RECEIVE FOLDER	VIEW gSyncit	APPOINTMENT SERIES
	ting Invite	ZZ Show As: Bus Reminder: None	Recurrence Categorize Low Importance
8 9 9 9 8 8		)   <b>   </b> ▼ ← ∃	Appointment Recurrence
Image: september 2013            SU MO TU WE TH FR SA         25         26         27         28         29         30         31           1         2         3         4         5         6         7           8         9         10         11         12         13         14           15         16         17         18         19         20         21           22         23         24         25         26         27         28           29         30         1         2         3         4         5	SUNDAY 8 Pacific 5 <sup>AM</sup>	tember 8, 20	Appointment time Start: 7:00 AM End: 8:30 AM Duration: 1.5 hours Recurrence pattern Daily Recur every 1 week(s) on: Weekly Sunday Monthly Yearly Yearly
Calendar - Sandy Por			Range of recurrence
Backup Calendar - sandy_ryla US Holidays	7 Channel 8	7 - Sunday Morning	Start:         Sun 7/22/2012 <ul> <li>No end date</li> <li>End after:</li> <li>10</li> <li>occurrences</li> <li>End by:</li> <li>Sun 9/23/2012</li> <li>V</li> </ul>
	9		OK Cancel Remove Recurrence

- 2. When the Appointment Recurrence box appears select the Recurrence pattern by selecting the **Daily, Weekly, Monthly or Yearly** option button.
- 3. Select the Recur every \_\_\_\_ days/weeks/months as desired. This allows you to schedule something every other day/week/month or once a quarter etc.
- 4. Select either No end date, End After \_\_ occurrences, or End by date.
- 5. Click OK and Save and Close when done.

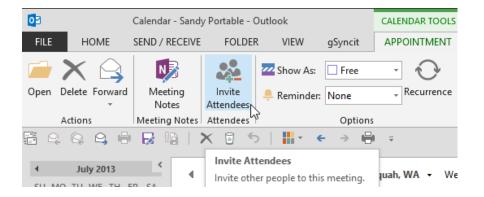
#### Remove a Recurring Appointment

- 1. Click on the appointment and click the **Recurrence** tool on the Appointment Series tab.
- 2. Select Remove Recurrence.

## **Group Meetings**

**Schedule a Group Meeting** 

- 1. Click to select the appointment.
- 2. Click Invite Attendees on the Appointment tab.



#### 3. Click Scheduling.

FILE MEETING	INSERT FORMA		A - Outlook Intern VIEW gSyncit		eeting	?		×
Delete Copy to My Calendar	Appointment	Meeting Notes	Cancel Cancel Invitation	Vone	<ul> <li>Recurrence</li> <li>Time Zones</li> </ul>	Categorize	Zoom	
Actions	Show	Meeting Notes	Attendees		Options	Tags	Zoom	~
∎ 5 ° ↑ ↓	∰ <b>∓</b>							
You haven't sent this m     ▼   From ▼   sa     ™   To   □	Find the best tim		ing					
	NWA PA - Outlook In	termediate (10)						

4. Select Add Others then select Add from Address Book.

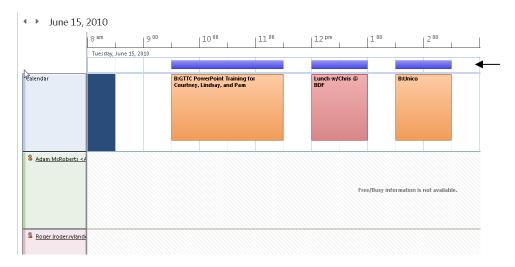
		B:NWA PA	- Outlook Intermed	ate (10) - Meetin	g Ol	? 5	a – 🗆 🗙
FILE MEETING	INSERT FORM	AT TEXT REVI	EW gSyncit	S			
Delete Copy to My Calendar	Appointment	Meeting Notes I	Cancel 💏 Invitation 📇 🔹	Vone	<ul> <li>▼</li></ul>	Categorize	Zoom
Actions	Show	Meeting Notes	Attendees	Op	otions	Tags	Zoom 🔺
	⊕ ∓						
E Send Q 10	00% -			Wednesd	lay, July 10, 2013		
	12:00 PM	1:00 2:00	3:00 4:00	8:00 AM	9:00 10:00	11:00 1	2:00 PM 1:00
All Attendees	-tuent						
Click here to add a							
Add Others 🔻 Optio	ns 🔹 Start time	Wed 7/10/2013	8:35 AM	•			•
Add from <u>A</u> ddress B		Wed 7/10/2013	10:55 AN	1 -			
Add <u>P</u> ublic Folder							
📕 Busy 💋 Tentative 📕 O	out of Office 🛛 🕅 Wo	orking Elsewhere 🛛	No Information	Outside of wor	rking hours		

# <sup>84</sup> Office 365

- 5. Double click everyone you wish to invite. *Their names will appear in the Required box.*
- 6. Click once on a resource (like a conference room or a projector if required) and click on **Resources**. Important: Make sure to invite as a resource and NOT a Required Attendee.

Select Se	ct Attendees and Resources: C         olumns       Address Book         Go       Contacts - sandy@rylander		nd
Name	Display Name	E-mail Address	
-	Aaron J. Wolff (aaron@theduifirm.c Adele & Byron Piro (adelepiro@ma. Aileen Lu (aileenlu@hotmail.com) Alain Orozco (alain_orozco@hotma Alex Rylander (alexhvzr1@gmail.com Alice Heimbeck (alice.heimbeck@co Alice Truan (atruan@williamskastne Alice Truan (Business Fax) Alicia Phifer (alicia_phifer@hotmail. Alison McIrvin (alison.mcirvin@gma Andrea Ballard (andrea@topnetwo Andy Stearns (andrew.stearns@gm. ly Ann & Perry Bongiani and Family (a	<ul> <li>adelepiro@mac.com         aileenlu@hotmail.com         ailain_orozco@hotmail.com         alain_orozco@hotmail.com         alexhvzr1@gmail.com         alice.heimbeck@colliers.com         atruan@williamskastner.com         Alice Truan@+1 (206) 628-6611         alicia_phifer@hotmail.com         alison.mcirvin@gmail.com         andrea@topnetwork.com         andrew.stearns@gmail.com         annbongiani@comcast.net</li> </ul>	<b>^</b>
	conference rooms, projectors and	> 	
Resources -> othe	er resources here.	OK Cancel	

7. Click **OK** and The free/busy times for all the resources will be displayed.



8. Look at the top of the scheduling grid to see when all required attendees are free. If the **top row is gray**, you know everyone is free at that time. If the top row is blue or purple, people are busy or out-of-office.

- 9. Click back on the **Appointment** tab.
- 10. Make sure you put in a location if you have not scheduled a conference room, subject etc. and then click Send.
- 11. The recipient will receive a message asking whether he/she wants to attend. They can accept or decline.

#### **Meeting Reply**

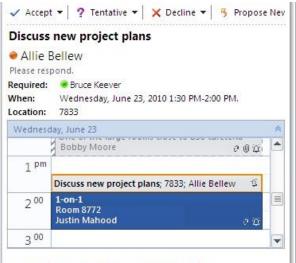
Scheduling a meeting is as easy as replying to the message. While reading a message, you can schedule a meeting with all the message recipients with the new **Meeting Reply** command. All the messages recipients are added to a new a meeting request in one click.

#### **Group Meetings are Easier to Manage**

When updating a group meetings agenda, attendees receive an informational update, rather than having to reaccept the meeting. Changes are also highlighted in the meeting update.

#### **Quick View**

When you receive a meeting request, Quick View helps you better understand how a meeting request affects your calendar. When creating or responding to a meeting request, a calendar snapshot appears in the meeting request. You can instantly review any conflicts or adjacent items on your calendar without ever leaving the meeting request.



We need to meet and go over the new plans.

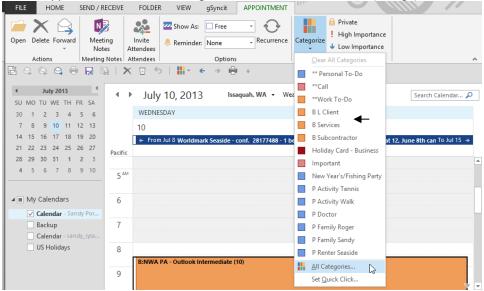


#### **Color/Categorize Appointments**

Color and Categorize appointments to easily see which appointments fall into a category (i.e. Important, Business, etc.). Use automatic formatting to color all appointments meeting a condition (i.e. automatic formatting can color Business related meetings orange).

Color code an Appointment - Assign a Category

1. Click an Appointment. Click the **Categorize** tool and select **B L Client** (orange).



Automatically Color Code an Appointment - Conditional Formatting

1. Select the View tab, View Settings, Conditional Formatting.

FILE	е но	ME	SEND / RE	CEIVE	FOL	.DER	VIEW	gSyncit	APPOI	NTMENT
Chang View	ge View	<b>K</b> eset View	Day	Work Week	Week	Month	Schedule View	Time Sca Overlay		Color
	Current Vie	w				Arrange	ment		G.	Color
Advanced View Settings: Calendar									×	
4	Descript	ion								
su		Colum	1s	Star	t, End					
30 7		Group I	Ву							
14		Sort.								
21 28		Filter		Off						
4	0	ther Sett	tings	Fon	ts and o	ther Day	//Week/M	onth View sett	tings	
	Condi	tional Fo	ormatting	User	define	d colors	for appoir	ntments 🗲	_	
	Fo	rmat Col	umns							
	Res	et Curre	nt View					ОК	Can	cel

2. Click Add.

	Conditiona	al Formatting	×
Rules for this vie	w:		
<ul> <li>Business</li> <li>Children</li> </ul>		A	Add
<ul> <li>Birthday</li> </ul>			Delete
✓ Mama ✓ Important			
✓ Untitled			Move Up
		~	Move Down
Properties of s	elected rule		
Name:	Untitled		
Color:			~
Condition	]		
		ОК	Cancel

- 3. Type the name of the Automatic Formatting Rule in the Name box i.e. "Birthday".
- 4. Select a label **Color** from the Color drop-down list.
- 5. Click **Condition** *Describe what criteria needs to be met to Color code the appointment*.
- 6. To color all appointments with the word Birthday, **type Birthday in the Search for Word(s) box**. You can also add Bday and Anniversary to search for those as well. Separate each search criteria with a comma.

Filter								
Appointments and Meetings	More Choices Advanced							
Search for the word(s): Birth	iday, Anniversay, Bday 🗸 🗸							
<u>I</u> n: subj	ect field only							
Organized B <u>y</u>								
Atten <u>d</u> ees								
Ti <u>m</u> e: non	e 🖌 Anytime 🗸							
	OK Cancel Clear <u>A</u> ll							

- 7. Click OK twice.
- 8. Test the Automatic formatting by **adding a Birthday appointment**. When you click off of the appointment it should turn the color you selected.

## **Dismiss Multiple Reminders At Once with Dismiss All**

If multiple reminders occur at the same time, Microsoft Outlook combines them into one dialog box. This reduces clutter, especially when starting Outlook after the reminder time for several items has passed, such as when you come back from being out of the office. You can dismiss reminders individually or all at once with the **Dismiss All** button. You can also selectively dismiss items using the selection techniques you learned in this manual.

niss two message	s		
÷	7 Reminder(s)	-	×
4 reminders	are selected		
*Greg Johnson	s Bday 9/4	6 hours overdue	
🛄 Paul & Anne M	arie Drager and Family's Birthday	51 weeks overd	
🛄 Alex Off		2 days overdue	
🏢 Judy Vanderwu	lp's Bday 8/31	4 days overdue	
Michel Newbur	y's Birthday	6 days overdue	
🏢 Stan van Zuider	n's Birthday	2 days overdue	
Channel 7 - Sur	iday Morning	2 days overdue	
Click Snooze to be r		Dismiss	;
	eminded in:		
10 minutes	▼ Snooze	Dismiss <u>/</u>	<u>A</u> II

1. Click the first message and ctrl + click the last message. With both messages selected, click Dismiss.

# **Calendar Groups**

Quickly see the calendars of people you frequently work with. Select the members one time, then use the Calendar Group every time that you want view those same calendars. Calendar Groups can also include resources, such as conference rooms. This is a great way to find available conference rooms.

Т

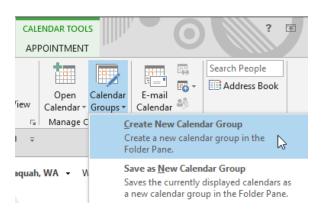
	- ( ) → J	uly 10, 2013 🛛 🖻	saquah, WA 👻 Weather	service is not available	Search Calendar 🔎
SU MO TU WE TH FR SA 30 1 2 3 4 5 6	Cal	endar - Sandy Portable 🗙		🔶 Calendar - sandy_rylander@i	msn.com 🗙
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21 22 23 24 25 26 27	<del>(</del>	Worldmark Seaside - conf. 281	77488 - 1 bed delux 🔿		
28 29 30 31 1 2 3 4 5 6 7 8 9 10	Pacific				
4 5 6 7 6 9 10	= 114				
<b>★</b>	5 <sup>AM</sup>				
A 🔳 My Calendars	6				
Calendar - Sandy Por	0			l€ 	
Backup	7			me	e
Calendar - sandy_ryla US Holidays	· · · · · · · · · · · · · · · · · · ·			Appointment	<u>i</u>
	8				odd
		IWA PA - Outlook Intermediate	(10)	Previo u s	Next Appointment
	9		v.,	2	z

## **Group Schedules**

View the schedules of multiple people or resources on a single calendar. The group calendar contains a detailed graph of when each user is free and busy and also shows details of their appointments when you rest the mouse pointer over an appointment (if you have been given permission).

#### Exercise:

- Create a Group Calendar for Conference rooms
  - 1. Select Calendar View and select Calendar Groups, Create New Calendar Group on the Home tab.



2. Type the name of the new group in the text box. Click **Ok**.

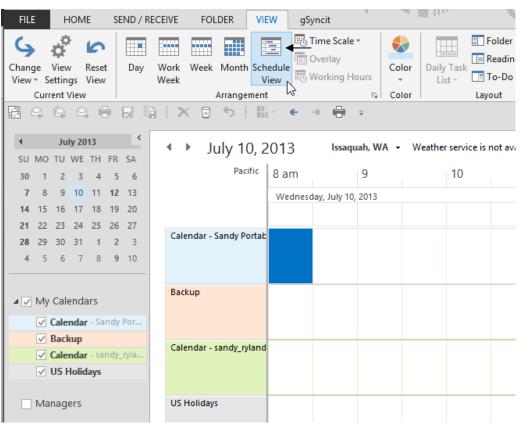
Create New Cale	?	×				
Type a name for the new calendar group Managers						
	ОК	Cance	el			

3. Select the names or public folders desired. Click **Ok**. *The number of names selected determines if calendars are displayed vertically or horizontally.* 

	Select Name: Contacts		>						
Search:      Name only OMore columns Address Book									
Go Contacts - sandy@rylanderconsulting.com v Advanced Find									
Name	Display Name	E-mail Address							
🚨 Aaron J. Wolff	Aaron J. Wolff (aaron@theduifirm.c	aaron@theduifirm.com	^						
🚨 Adele & Byron Piro	Adele & Byron Piro (adelepiro@ma	adelepiro@mac.com							
🚨 Aileen Lu	Aileen Lu (aileenlu@hotmail.com)	aileenlu@hotmail.com							
🚨 Alain Orozco	Alain Orozco (alain_orozco@hotma	alain_orozco@hotmail.com							
🚨 Alex Rylander	Alex Rylander (alexhvzr1@gmail.com)	alexhvzr1@gmail.com							
Alice Heimbeck	Alice Heimbeck (alice.heimbeck@co	alice.heimbeck@colliers.com							
🚨 Alice Truan	Alice Truan (atruan@williamskastne	atruan@williamskastner.com							
🚨 Alice Truan	Alice Truan (Business Fax)	Alice Truan@+1 (206) 628-6611							
🚨 Alicia Phifer	Alicia Phifer (alicia_phifer@hotmail	alicia_phifer@hotmail.com							
🚨 Alison McIrvin	Alison McIrvin (alison.mcirvin@gma	alison.mcirvin@gmail.com							
🚨 Andrea Ballard	Andrea Ballard (andrea@topnetwo	andrea@topnetwork.com							
🚨 Andy Stearns	Andy Stearns (andrew.stearns@gm	andrew.stearns@gmail.com							
🚨 Ann & Perry Bongiani and Family	Ann & Perry Bongiani and Family (a	annbongiani@comcast.net							
🚨 Ann & Perry Bongiani and Family	Ann & Perry Bongiani and Family (p	perry.bongiani@pharma.novarti	s						
🊨 Ann Marie Khalifa	Ann Marie Khalifa (annmarie@cmu	annmarie@cmu.edu							
🚨 Ann Shilling	Ann Shilling (annshilling@gmail.co	annshilling@gmail.com							
A A A A A A A A A A A A A A A A A A A	A	>>>	*						
Group Members ->									
		OK Cance	1						

# <sup>90</sup> Office 365

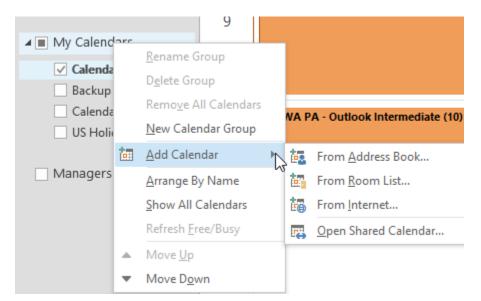
4. Selecting **View**, **Schedule View** will display them horizontally. *To display them vertically again, simply select Day, Week or Month view.* 



5. To go back to just viewing your own calendar, deselect other calendars in the navigation pane.

	• •	August 05, 2010	
1 2 3 4 5 6 7		Calendar 🗙	🔶 🔶 🔶 🔶 🔶
8 9 10 11 12 13 14		5 Thursday	5
15 16 17 <b>18 19</b> 20 21 22 23 <b>24</b> 25 26 27 28		💠 From Aug 4Clean Heat Filters, vacume refrig 👴 7:00am	
<b>29 30 31</b> 1 2 3 4			
🔺 🔲 My Calendars 📃 📥	8 am		
🔽 Calendar			
Court	900		
Other Calendars			
🖉 Check Signers 🛛 🚽	10 00		
🔽 Aaron J. Wolff	10		
🔽 Alison McIrvin (alison.mcirvin			
📝 Andrew & Torre Lumpe (alti1:	11 00		
4 🔲 Accounting			

6. You can add new calendars to the group, delete the group, move it up or down on the list, etc. just by right-clicking the group name in the navigation pane.



#### **View Multiple Calendars**

You can **open multiple calendars and display up to 30 calendars in side-by-side view**. You can also **overlay calendars to see transparent calendars stacked on top of each other**. This view is useful when you want to find a common free time slot on several different calendars.

July 2013     SU MO TU WE TH FR SA	••	July 10, 2013 Iss	aquah, WA 👻 Weather	service is not available	Search Calendar 🔎
30 1 2 3 4 5 6		Calendar - Sandy Portable 🗙		🔶 Calendar - sandy_rylander@	msn.com 🗙
7 8 9 10 11 12 13		WEDNESDAY		WEDNESDAY	
14 15 16 17 18 19 20		10		10	
21 22 23 24 25 26 27		← Worldmark Seaside - conf. 2817	7488 - 1 bed delux 🔿		
28 29 30 31 1 2 3	Pacific	-			
4 5 6 7 8 9 10					<b></b>
	5 м				
My Calendars					
Calendar - Sandy Por	6			ie	
Backup				eut	
Calendar - sandy_ryla	7			Appointment	Appo intment
US Holidays				0 d d	bi ii
	8				t Api
		B:NWA PA - Outlook Intermediate (	10)	Previous	Next
	9			ш	

In Calendar, the Navigation Pane shows a list of your calendars under My Calendars. This list includes your default primary calendar in Outlook that displays your free/busy time to other people, and where meeting requests that you accepted are saved.

Other calendars, or secondary calendars, can include calendars that you created to track a project, a personal schedule, or some other calendar event that you do not want to mix with the items on your default calendar.

**Tip!** When you share your default calendar, appointments on secondary calendars are not displayed to other people and do not affect your free/busy availability.



#### **Open a Calendar in a New Window**

- 1. In Calendar view, in the Navigation Pane, right-click the name of another calendar.
- 2. Select **Open in New Window.** *The calendar that you selected opens in a new Outlook window.*

Open a Calendar in Side-by-Side View

1. In Calendar view, in the Navigation Pane, select the check box of another calendar. The calendar that you selected opens next to the calendar that is already displayed.

**Tip!** At least one calendar must always be displayed.

#### **Overlay the Calendars**

- 1. In Calendar, in the Navigation Pane, select the check box of another calendar that you want to view.
- 2. The calendar that you selected opens next to calendar that is already displayed.
- 3. Repeat step 1 for each calendar that you want to view.
- 4. On the Calendar tab Court X, click .

The calendars are now in overlay mode.

	🔶 Calendar	× > Court	×						
	27 Sun	28 Mon	29	Tue	30 Wed	31 Thu	1 Fri Gert Philipj 🕗 Maggie Ha 😥	2 Sat	
9 <sup>am</sup>									
10 <sup>00</sup>	× weith the second seco								ient 🗵
11 <sup>00</sup>	Previous Appointm ent					B:Fisherman's Terminal - Theone at TOC			Next Appointment
12 <sup>pm</sup>	Previo	Kim Gillespe							Ned
1 <sup>00</sup>	le Garden in the International								

To add another calendar to the overlay, repeat this step.

#### **Remove a Calendar from the Overlay Stack**

- 1. In Calendar, on the tab of the calendar Calendar Court 
  that you want to remove from the overlay stack, click
- 2. The tab moves back to the right. The calendar that you selected is no longer displayed in overlay mode.
- 3. Repeat step 1 for each calendar that you want to remove from the stack.

# **Print Calendar**

#### Exercise:

- Print a Month Calendar
  - 1. Select Calendar Month View. Click the **Print** tool *Views print as they are shown on screen*.
- Tip! Check date range before printing!

#### Send Calendar Snapshots

Send your Calendar to anyone in an email message. The recipient can open the calendar in their Web browser or Outlook.

1. On the Calendar view Home tab, click **Email Calendar**.

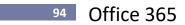
E-mail
Calendar
2

2. Select the Date Range, the level of Detail and any other desired options. Click OK.

	Send a Calendar via E-mail								
Specify the calendar information you want to include.									
Ca <u>l</u> endar:	Calendar 🗸								
Date <u>R</u> ange:	Today 🗸								
<u>D</u> etail:	Thu 9/5/2013  Availability only Time will be shown as "Free," "Busy," "Tentative," "Working Elsewhere," or "Out of Office"								
<u>A</u> dvanced:	Show time within my working hours only <u>Set working hours</u> Show >> <u>QK</u> <u>Cancel</u>								

3. The email with the calendar is on the screen.

			endar.ics (3 KB)	Sandy Rylander Calenda	Attached
• • • • • 10 • • • • • • • • • • • • •	1 • • • 6 • • • 1 • • • 7 • • • 1 • • • 8 • • • 1 • • • 9 • • •	5 1	4	2	
	September 2013 Su Mo Iu We Ib Ec Sa				
	<b>1 2 3 4 5</b> 6 7 8 9 10 11 12 13 14		123	4.5	
	15 16 17 18 19 20 21 22 23 24 25 26 27 28	24	1 12 13 14 15 16 17 8 19 20 21 22 23 24	11 12 18 19	
	29 30		> 26 <u>27</u> <u>28</u> <u>29</u> <u>30</u> <u>31</u> ⊠ Tentative	25 26 Busy	
	Outside of Working Hours	ing Elsewhere	fice 🔄 Working I	Out of Office	
			13	August 2013	
			ug 27	🔺 Tue, Aug 27	
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		M Free	8:00 AM - 9:00 AM	8:0	
		PM Busy	9:00 AM - 1:00 PM	9:0	
		PM Free	1:00 PM - 1:30 PM	1:	
		PM Busy	1:30 PM - 3:30 PM	1:	
			3:30 PM - 5:00 PM	3:	
		PM Free	After 5:00 PM		
	22 23 24 25 26 27 28 29 30	2 17 2 24 2 23 2 24 2 23 2 24 2 24	1 19 20 21 22 23 24 27 28 29 29 29 20 27 Tentative 10 Working I 13 15 16 10 AM − 9:00 AM 9:00 AM − 9:00 AM 1:00 PM − 1:30 PM 1:30 PM − 3:30 PM	11 12 18 19 19 25 26 Dury Out of Office August 2013 Tue, Aug 27 	



# Tasks

#### **Create a Task**

## Exercise:

- Create a New Task Using the New Tool
  - 1. When in Task view, click the **New Task** tool on the Home tab.

FILE	HOME	SEND / R	ECEIVE	FOLDER	VIEW	gSyncit							
		X			Meeti	· · ·	rk Remove	I Today I Tomorrow	► Next Week  ► No Date			*	^ •
New Task	New New Email Items≖	Delete	Reply	All	vard 🗐 More	Com	olete from List	P This Week	Custom	Detailed	Simple List	To-Do List	-
	New	Delete		Respo	ond	м	anage Task	Follo	w Up		Current Viev	N	

2. Complete the Task dialog box (very similar to the Appointment options).

🔄 且 S	c≥ ↑ ↓ =				Untitled ·	- Task		?		×
FILE TAS	SK INSERT	FORMA	T TEXT	REVIEW	gSy	ncit				
Save & Delete F Close	orward OneNote	<b>T</b> ask	<b>Details</b>	Mark Complete	_	Send Status Report	Recurrence	Categorize Follow	G Q I Zoom	
Act	ions	Sh	ow	M	lanage Ta	isk	Recurrence	Tags	Zoom	~
S <u>u</u> bject										
S <u>t</u> art date	None			Status	Not Sta	rted	-			
<u>D</u> ue date	None			<u>P</u> riority	Normal	-	% <u>C</u> omplete	2 0% 🔺		
Re <u>m</u> inder	None			None		- 4	🕅 Owner	Sandy Rylander		
······ 1	1 2	1 • • • 3		4 1	5 .	6 .		8	9	54

3. Click Save and Close when done.

- Create a Task Using Click here to add a New Task Box This method is great for adding many tasks quickly.
  - 1. Type the task and press **ENTER**. Repeat as necessary.

□ I ASK SUBJECT	DUE DATE	DATE COMPLETED	CATEGO
Click here to add a new Task 🚽	N		
<ul> <li>Categories: (none): 6 item(s)</li> </ul>	45		
호 🗌 Beneficiary Info	None	None	
뉟 🗌 Pleading fixes with Joanne Guzman	None	None	
🔽 🔲 NWA-Prepare Excel Macros Class	Thu 8/8/2013	None	

2. To add a due date, click in the due date box directly next to the task and then click the down arrow to display a calendar. **Select a date**.

 						K
•	S	epte	mbe	r 201	3	¢3
SU	мо	τu	WE	тΗ	FR	SA
25	26	27	28	29	30	31
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	1	2	3	4	5
	Tod	ay		N	lone	

3. To edit the task, double click to open the task.

FILE	TASK IN	SERT FORMA	AT TEXT R	EVIEW gSynd	it			
2	× 🤹			1	$\bigcirc$			
Save & Close	Delete OneNote	Task Details	Cancel Assignment	Address Check Book Names	Recurrence	Categorize Follow • Up •	↓ Zoom	
	Actions	Show	Manage Task	Names	Recurrence	Tags	Zoom	^
ت Send	From • To Subject	sandy@rylanderc Roger Rylander (r Pleading fixes wi	rylande@yahoo.					
	Start date	None		Status	Not Started	•		
	Due date	None		Priority	Normal	<ul> <li>% Complete</li> </ul>	0%	
<ul> <li>Keep an updated copy of this task on my task list</li> <li>Send me a status report when this task is complete</li> </ul>								
§		. 2 3	4.		1 • • • 6 • • •	7	8 · · ·   · · · 9 ·	•••••••••••••••••••••••••••••••••••••••

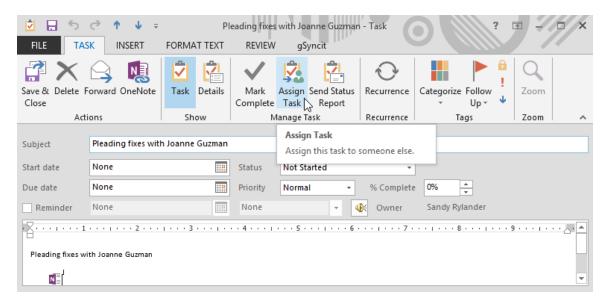
- 4. You can add reminders, due dates, start dates, status, priority, notes, make the task recurring and mark tasks private etc. just like you did for other items in Outlook.
- 5. Use the same methods for deleting, printing and adding categories as you did for other Outlook items.
- 6. Click Save and Close when done.



#### **Assign Tasks**

#### Exercise:

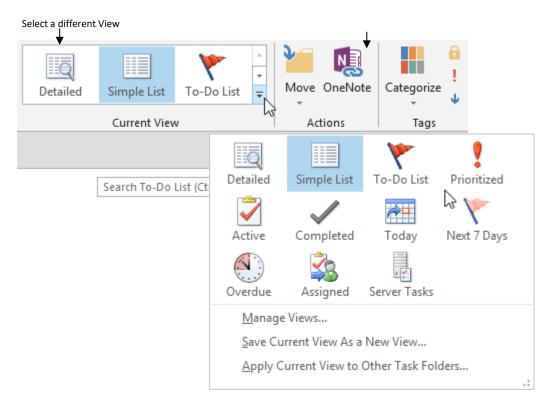
- Assign a Task to a Co-worker
  - 1. Double click on a task to open it.
  - 2. Click the Assign Task tool.



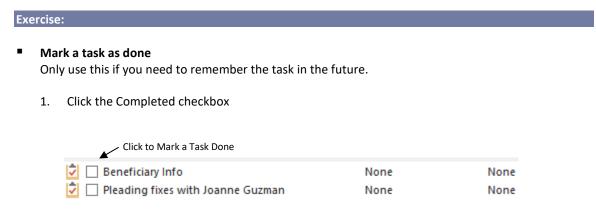
- 3. Click the "**To**" to select the person you wish to assign the task to. Only assign a task to one person if you wish to track it.
- 4. If the two boxes above are checked, the person who assigns the task will automatically be notified by email when a task is updated and/or completed.
- 5. Click Send to send the task.
- 6. Recipients can accept or decline an assignment.

#### **Task Views**

1. Click the View desired from the current view group on the Home tab. By category and by person responsible are very useful, as are completed tasks and active tasks. Simple list shows both completed and active tasks.



# Delete Tasks or Mark them as Done



#### Delete a Task

- 1. Select the task.
- 2. Click the **Delete** tool on the toolbar or right click the task and select Delete.

# **Appendix A – Outlook Office 365 Enhancements**

Office 365 subscription, which includes Outlook Office 365 is constantly evolving and adding features. Currently some of the great new features include:

- Email Attachments
  - Easily insert recently used documents in an email
  - Get a menu of options for what to do with attachments you receive
  - A file that has been saved on OneDrive will, by default, send as a link rather than an attachment.
- Clutter

*Clutter uses criteria that keeps evolving to place low priority mail in a separate folder.* 

- Tell Me What you want to do
- One Click Archiving
- Smart Lookup

*Outlook Office 365 (and all the Office 365 applications) have the Smart Lookup feature which uses Bing integration as a research tool.* 

Better performance/Search

Outlook opens more quickly and has improved the performance of the Search feature which is faster and will search not only locally, but also on the Exchange server.

 Groups - lets users chat, share common calendars, OneDrive-hosted files, and OneNote notebooks



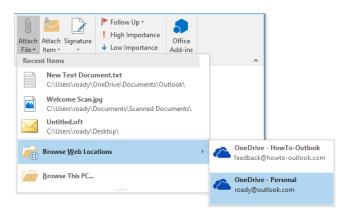
# **Email Attachments**

In Outlook Office 365, there are three important changes in regarding email attachments.

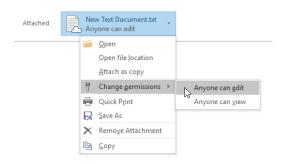
# Send a Link rather than an Attachment if the document is stored in a Cloud location like OneDrive

Clicking on the Attach File icon will now open a menu instead of a browser dialog to attach a file.

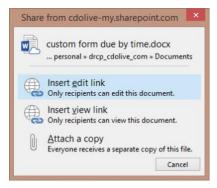
One of the new options is to "Browse Web Locations". This allows you to access your online storage like OneDrive and Office 365 SharePoint (OneDrive for Business) without needing to download the file to your computer first.



By default, the recipient will receive a link to the file with editing permissions. You can click on the down arrow of the attachment to change the editing permissions for the recipient to "view" only or to "Attach as copy" to send an actual attachment.



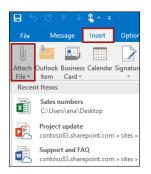
If the file you choose is stored online, you are offered the choice of inserting a link or a copy of the attachment- links are the default. Links to documents can be viewed and edited using SharePoint.



# **Attach Recently Used Documents**

When you select Attach file a list of the 12 most recently accessed files appears.

1. Select a document from the drop-down list displayed after clicking the Attach File tool on the ribbon.



# **Attachment Handling**

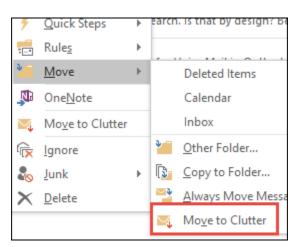
Attachments in messages you receive now appear as buttons in the attachment line. Each button has a menu with attachment options: open, save, preview, delete, etc.

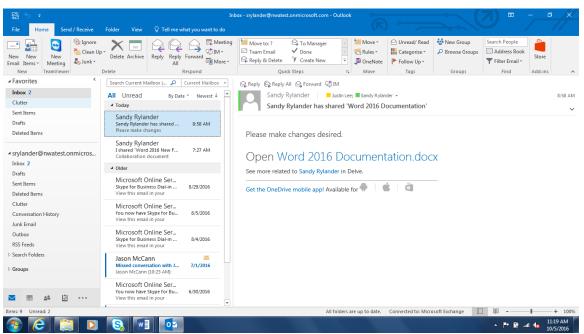
W		JP,DOT MB
		Preview
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Jera	÷	Quick Print
	R	Save As
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Ser To:	×	Remove Attachment
	ħ	⊆ору
nev	ER.	Select All

# **Clutter - sort low priority messages**

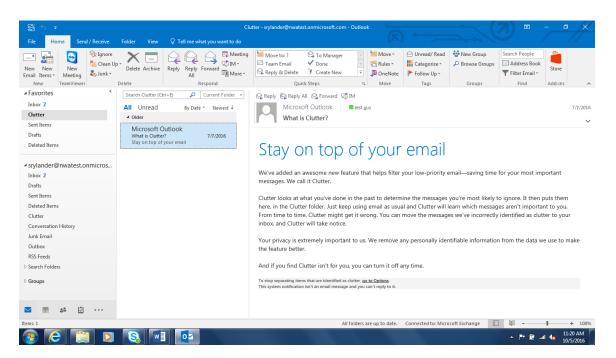
Clutter helps you move low priority messages out of your Inbox so that you can easily scan for important messages. Clutter analyzes your emails, and based on your past behavior, determines the messages that you're most likely to ignore. It then automatically moves those messages to a folder called **Clutter** so that you can review them later.

You can even help Clutter learn your preferences faster by manually moving items in or out of the Clutter folder.





# Outlook Office 365 103



NOTE: If you bought Office 2016 for Windows as a one-time purchase, and you don't have an Office 365 subscription, you won't have access to some features, such as Clutter. Going forward, there will be regular updates with new features where you'll need to have an Office 365 subscription to use them.

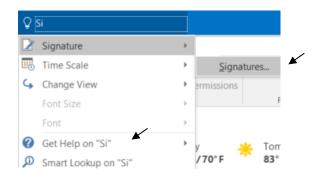
# Tell Me What You Want to Do

The new Light Bulb icon in the Ribbon with "Tell me what you want to do..." is a lot more than just a replacement of the Help Question Mark icon.

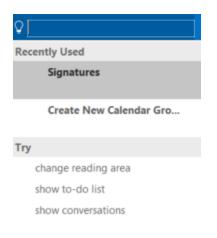
When you type something in the Tell Me field, you'll actually search through Outlook's list of commands which are then also useable from list of results.

So, if you for instance don't know how to Create/Modify Automatic Signatures, simply type "Sig" in the Tell Me field and you can click on the command from the results.

Clicking on the "Get Help" link will open the regular Help viewer and the "Smart Lookup" link will open an "Insights" pane in Outlook and performs a web search with Bing.



When you click in the **Tell Me** box, you'll also see a list of the last five commands you ran from within **Tell Me**, saving you time getting to the feature you want faster.



# **One Click Archiving (Office 365)**

Outlook Office 365 includes a new feature called one-click archiving. This feature allows you to quickly move an item from your Inbox or another folder to an archive folder. An archived item (or items) remains accessible, but doesn't clutter your Inbox.

Archive messages with a single click

- 1. Choose one or more messages in your folder to archive.
- 2. On the ribbon, in the **Delete** group, choose **Archive**.



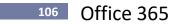
**NOTES:** If you haven't previously set up an archive folder, you'll get this prompt:

Set up One-Click Archive	? >	×					
We didn't find an existing archive folder. Create a new folder called "Archive"?							
Create archive folder	Choose existing folder	Cancel					

Choose one of the following:

- Create archive folder.
- Choose existing folder. 0
- 3. Choose the message in the message list you want to archive, and then choose Archive.

As soon as you choose Archive, messages are immediately moved to the archive folder you've specified. If you archive a message by mistake, go to the archive folder and move the message back to your Inbox.



# **Smart Lookup**

Outlook Office 365 (and all the Office 365 applications) have the *Smart Lookup* feature which uses Bing integration as a research tool.

To use Smart Lookup:

- 1. Select a word or phrase, right-click it, and choose **Smart Lookup**.
- The Insights pane, powered by Bing, appears and opens with definitions, Wiki articles, and top related searches from the web.
   You can also get to Smart Lookup any time by going to Review > Smart Lookup and entering a query there.

# Search

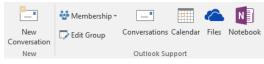
Outlook Office 365 email search is faster, more reliable and provides improved performance. You can seamlessly search email across your local computer, Exchange 16 server or Office 365 Mailbox.

Outlook makes it easier to find email by offering keyword and people suggestions based on your mailbox content from Exchange 2016. You can quickly find email from someone that you've been exchanging emails with or a project you're working on. Simply start typing someone's name or a keyword in the search box to see suggestions from Exchange 2016.

# Groups - (Office 365 work or school account)

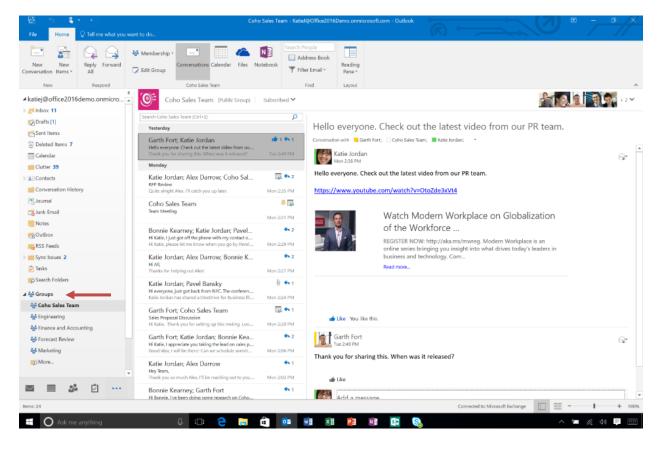
Groups lets users chat instead of email which reduces the strain on their inbox. Groups also lets users share common calendars, OneDrive-hosted files, and OneNote notebooks. Groups are just below your inbox in the left-hand navigation column, below drafts, sent items, and junk mail. In short, a group is basically a shared mailbox you can subscribe to (or even create yourself) and also provides a Calendar and a shared storage location on OneDrive for Business.

Outlook Office 365 now includes support to create, join and manage Office 365 Groups so you'll no longer have to do that via Outlook on the Web (OWA).



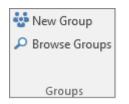
Ribbon commands for Office 365 Groups.

**Note:** Office 365 Groups requires an Office 365 for Business account. This feature is (currently) not part of Exchange 2016 on-premises.



#### Group Buttons on Ribbon - Browse and Create Groups

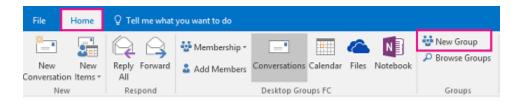
Two new buttons on Outlook Office 365 ribbon's Home tab make it easier to browse and create groups.



## **Create a Group**

Groups are the next generation of distribution lists. They provide a effective way to communicate and collaborate with team members. A group is a shared workspace for email, conversations, files, and calendar events.

1. Open Outlook Office 365, select a group, and, on the Home tab, choose New Group.



2. In the **Create Group** window, enter the required information, including **Name**, **Group ID**, and **Privacy** level, (Public or Private).

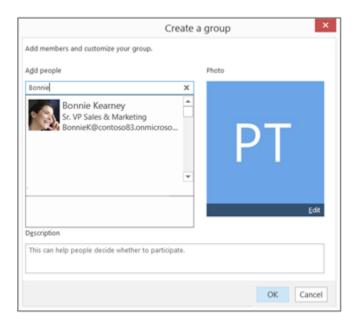
**NOTE:** You won't be able to change the group ID after you create the group.

3. Check the subscription box to let members receive the group's emails in their regular Inbox or keep it un-checked if you prefer that they access the group's mail only from the group's Inbox, and then click **OK**.

	Create Group	? ×
A group provides a place for sh	ared conversations, files, and a group calendar.	
Choose a game	group ID	
Project Team	ProjectTeam	@contoso83.onmicrosoft.c
Brivacy	Available	
Private - Only approved memb	ers can see what's inside	*
Sybsoribe new members so group inbox.	they receive group conversations in their inbox. Of	therwise they'll only see them in the
After the second is resulted used	I be able to add members to it.	OK Cancel

4. When the group is created, add the members, description, and a photo for the group. You can do this after the group is created as well.





5. Click **OK** when you're done. You'll see your newly created group on the left NAV bar and a Welcome email in your group's Inbox.

## Search for, join, and go to a group in Outlook Office 365

You may be added to a group by the group's admin and want to find out more. You can also search for groups and join them.

Search for a group to join

When you know the name of a group that you want to join, search for that group by doing the following

- 1. On the Home tab, enter the group name in the Search People box.
- 2. When you find the group that you're looking for, select it from the list.



3. On the group's contact card, click Join.

If the group is private, a request will be sent to the group's admin, who can accept or decline the request.



#### Join a group from an email

You might receive an email message from a group that you're not a member of and decide to join the group.

 Select Join on the group header in the right corner of the reading pane. If the group is private, you'll see Request to Join instead, and will be asked to provide a reason for joining.



- 2. Wait for your request to go through, or for the group's admin to add you if you're trying to join a private group.
- 3. Once you've joined the group, you'll see detailed membership status as well as a shortcut to navigate to the group's Inbox in the group's header.

#### Go to a group that you were added to as a member

When you're added to a group, you receive an email notification.

1. Open the email and click **Go to the group** link.

You're n group	ow a member of the Project Team
PT	Project Team Go to the group

- 2. Use the options on the ribbon to start a conversation, change your membership status, etc.
- 3. You can go to the **Explore the group** section in your email notification to view conversations, the group's calendar and files.



4. All groups that you create or are invited to are on the left NAV bar under **Groups**. Access any of the groups by clicking the group name. Participate in conversations or use the options on the ribbon to access the files, calendar, notebook, and other information.

▲ Groups	
Project Team	

**NOTE:** If you are using Outlook 2013 and click the link in the invite, you'll be redirected to Outlook Web App to view the group's information and start communicating. However, you can view the group's email in your Outlook Inbox and reply.



Leave or unsubscribe from a group, do the following:

1. Select a group that you're a member of in the left nav bar.

▲ Groups	
Project Team	

- 2. Choose Membership on the ribbon. Then select:
  - **Unsubscribe** You'll still be a part of the group, but won't receive any conversations or invitations in your inbox.
  - Leave You'll no longer be a part of the group and won't be able to access the files or other data.



Edit information related to the group or delete it if you no longer need it.

1. Select your group on the left NAV bar, under Groups.

▲ Groups	
Project Team	

2. Select Edit Group on the ribbon.

🔹 Membership -	_		6	N			
📝 Edit Group	Conversations	Calendar	Files	Notebook			
Project Team							

- 3. Edit any of the settings and options below:
  - Group's name, description, or language.
  - To pick a new group photo, click the Edit link in the bottom right corner of the current group photo. You'll be re-directed to Outlook Web App, where you can click the Change photo button on the current group photo and upload a new one from your computer.



- To add a member to your group, type and then select the name of the person you want to join the group in the **Search People** box.
- o In the Members box, you can make someone an admin or remove admin permission.

• After a group outlives its intended purpose, you can delete it to free up system resources by clicking the **Delete group** button in the lower left corner of the window.

**WARNING:** When you delete a group, you permanently remove all group conversations, email messages, files, calendar events, and other information. There is **no way to recover the information**.

	Edit group Anahita	a's Group
AG	Choose a game Anahita's Group Group ID anahitasgroup@service Dgscription Testing Groups	Privacy Public within organization
A <u>d</u> d people Search People Members Anahita B	Remove admin status	Subscribe new members so they receive group conversations in their inbear. Otherwise they il only see them in the group inbox.
Ken Circeo Member	[	anguage for group-related notifications English (United States)
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