

# Outlook Office 365

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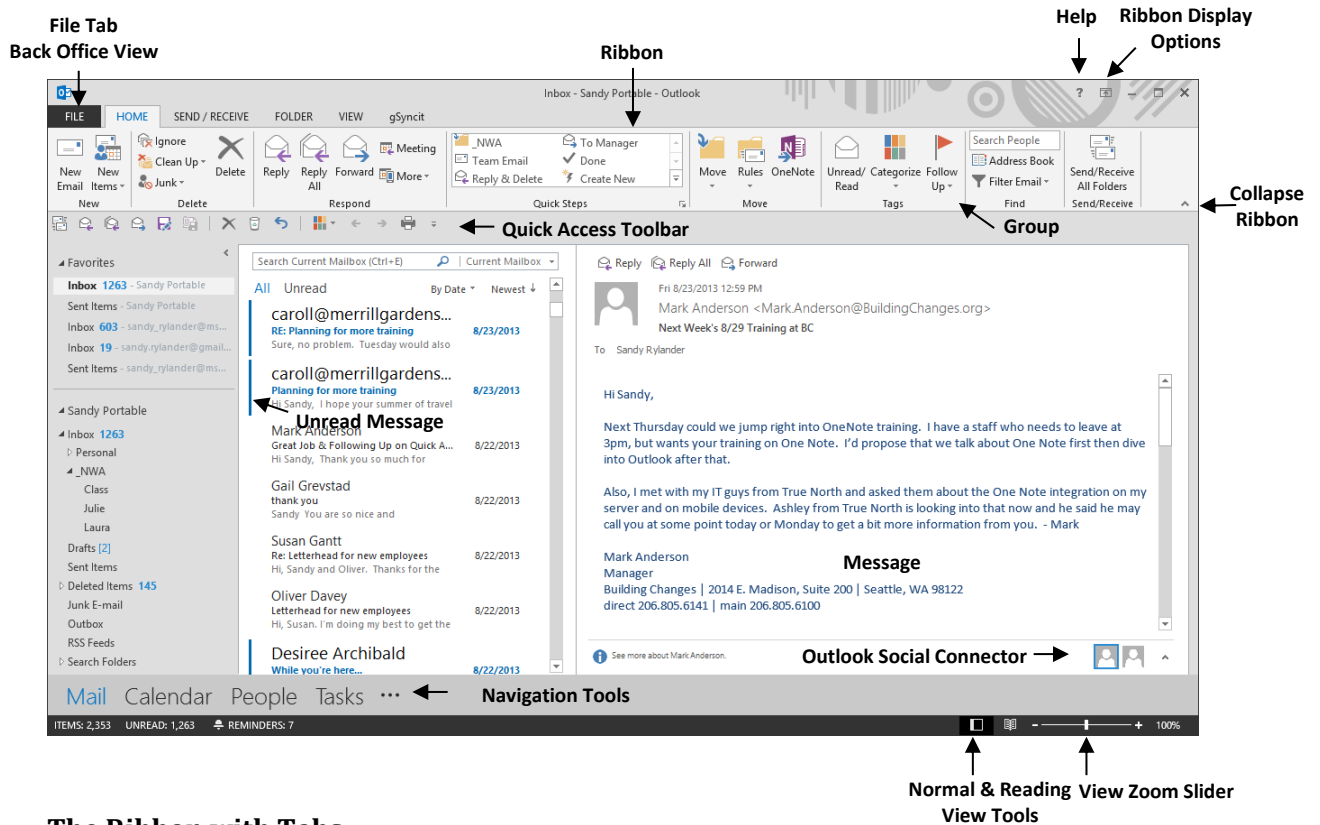
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## New Sleek Look - Identifying Screen Elements

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.

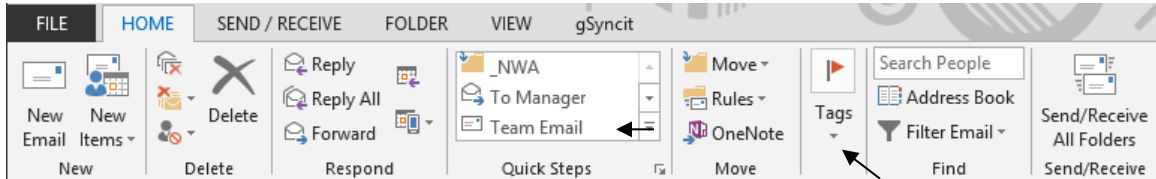


## The Ribbon with Tabs

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.



Sample of Groups Collapsing as Window Gets Smaller

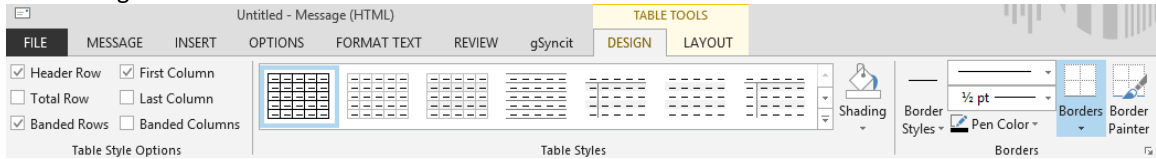
### Exercise:

- Select different tabs to view where commands have been placed.

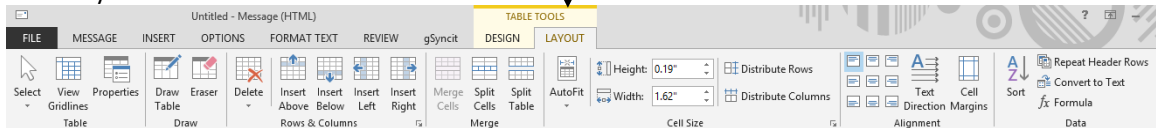
## Contextual Tabs

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



### Table Layout Tab



## The Quick Access Toolbar

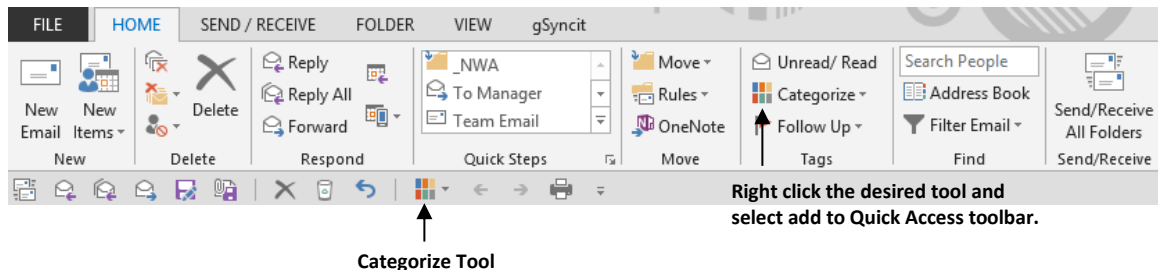
The Quick Access toolbar is always visible and therefore an excellent toolbar for your most used commands. While the Ribbon changes according to the selected Tab, the Quick Access toolbar stays the same.

### Customize the Quick Access Toolbar

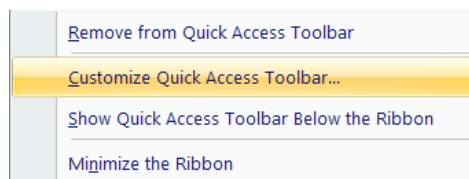
The Quick Access toolbar can be customized very easily. Simply right click on any tool and select Add to Quick Access Toolbar. You can also right click on any tool and select Customize Quick Access toolbar to see all customization options.

#### Exercise:

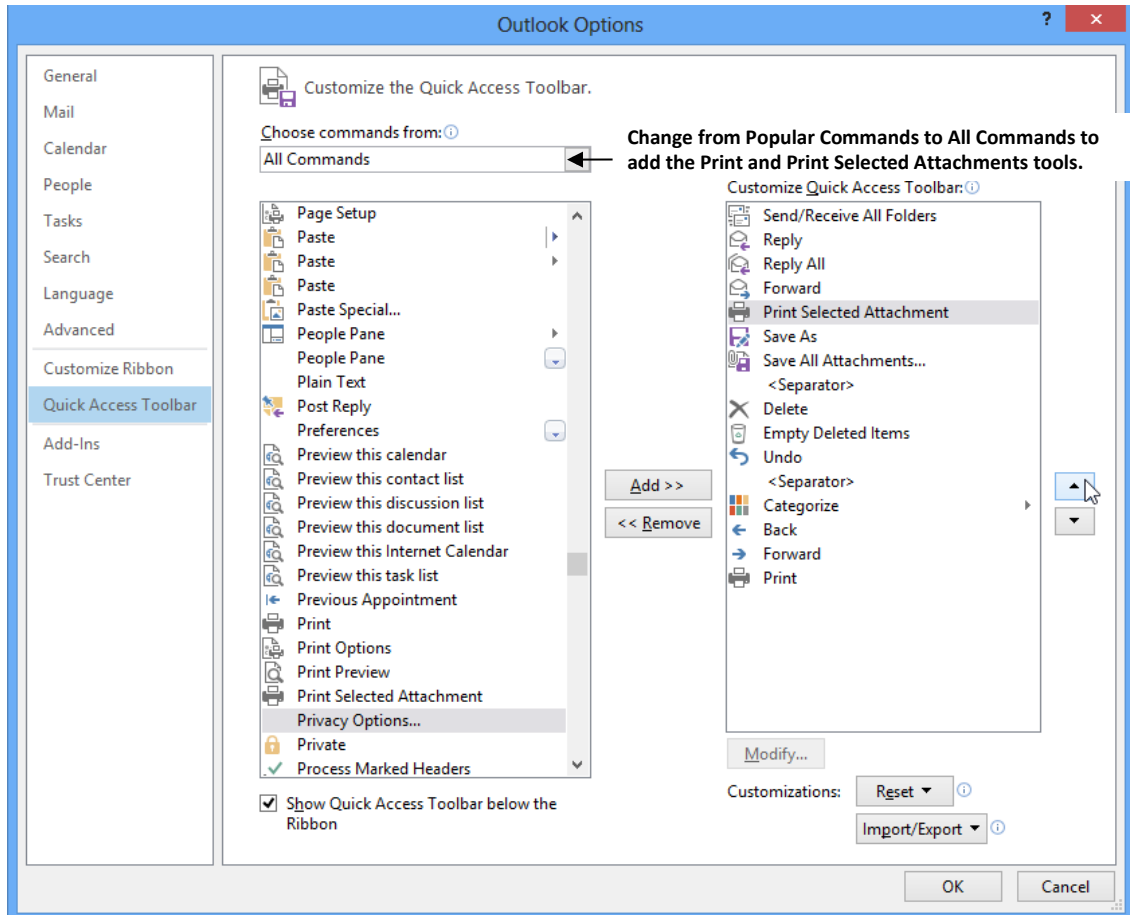
- Add the Categorize tool to the Quick Access toolbar.



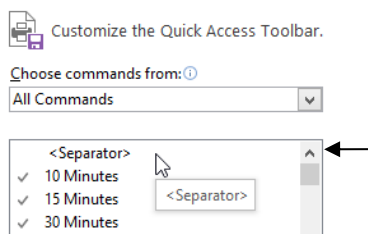
1. **Select the Home tab.**
  2. **Right click the Categorize tool.**
  3. **Select Add to Quick Access Toolbar.**  
*The tool is added to the end of the toolbar. Later you will learn how to move the tool.*
- Remove the Categorize Tool from the Quick Access toolbar.
    1. **Right click the Categorize 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**.



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.



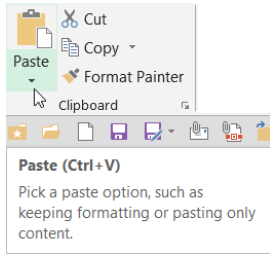
3. To add the **Print** and **Print Selected Attachment** tools, double click **each tool in the left column** or **click on it once** and then click **Add**. These commands are alphabetical so you will have to scroll down the list on the left to find them.
- Add the tools shown in the Quick Access Toolbar 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**.



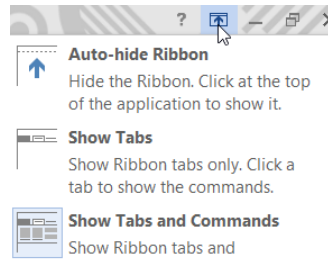
**Tip!** To add a command below another command on the Quick Access toolbar, click on the tool below which you want the new tool to appear and then double click on the tool you wish to add.

## 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:



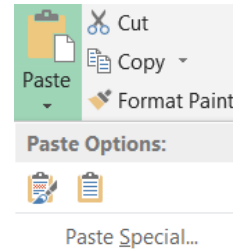
Screen Tips with Shortcut Keys



Ribbon Display Options

## 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.

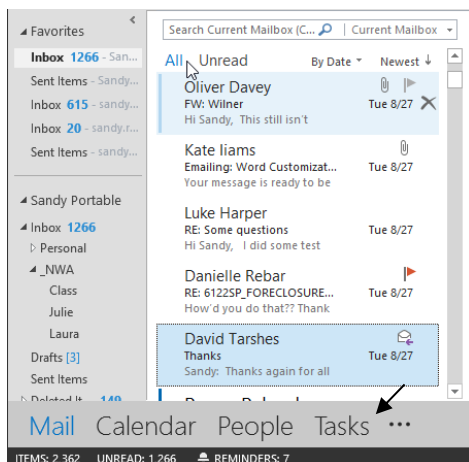


## Help

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

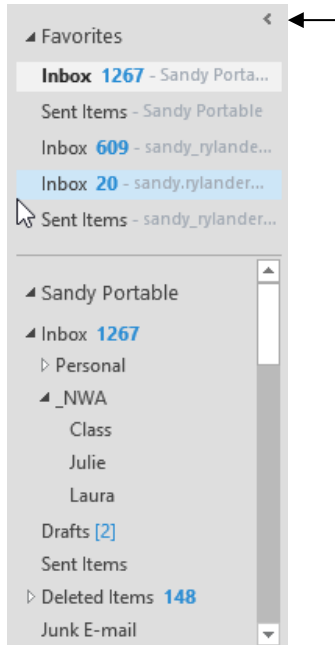


## Navigation Tools for Primary Folders at Bottom of Screen – New in 2013

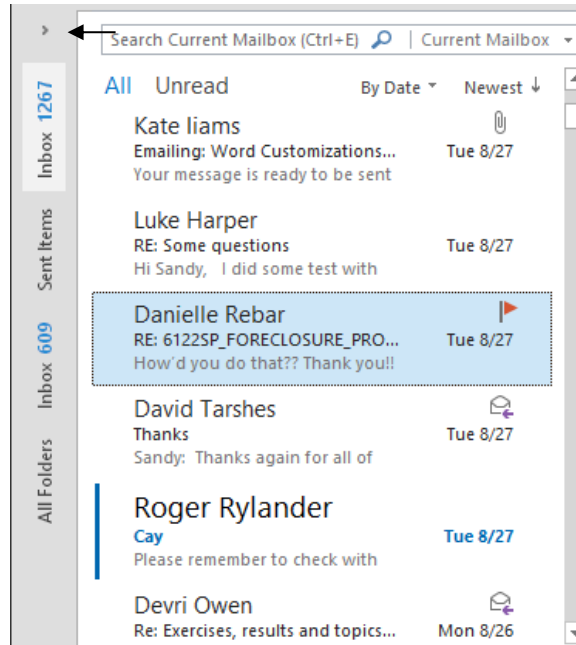


## Minimize the Navigation Pane

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



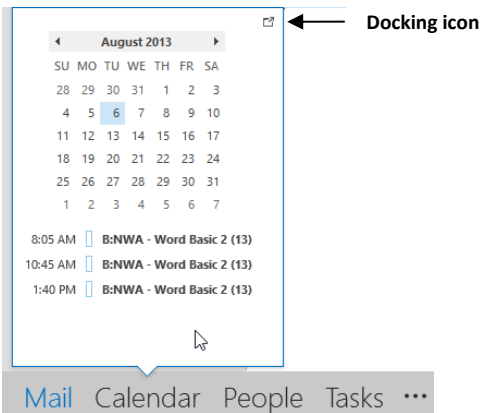
Navigation Pane Minimized

### 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.

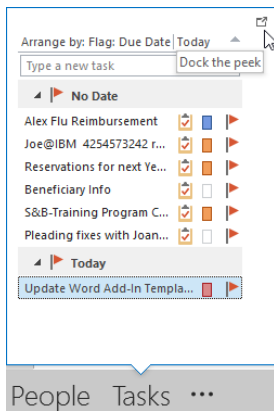
#### Calendar

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.



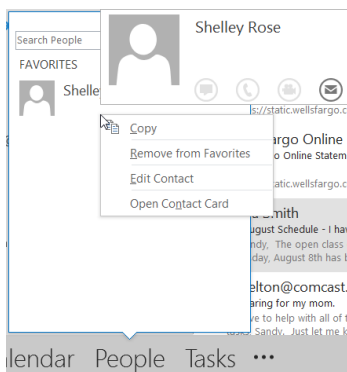
#### Task

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



#### Contacts

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

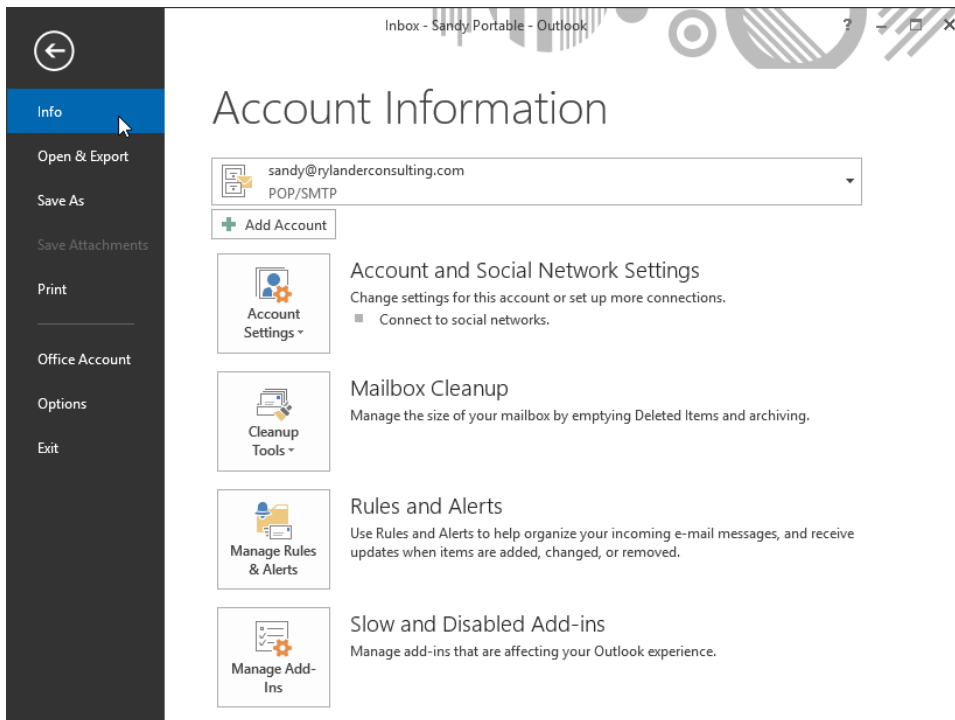


## The File Tab – Backstage View

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.

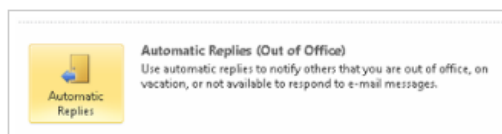
### File, Info

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



### Automatic Replies (Out of Office)

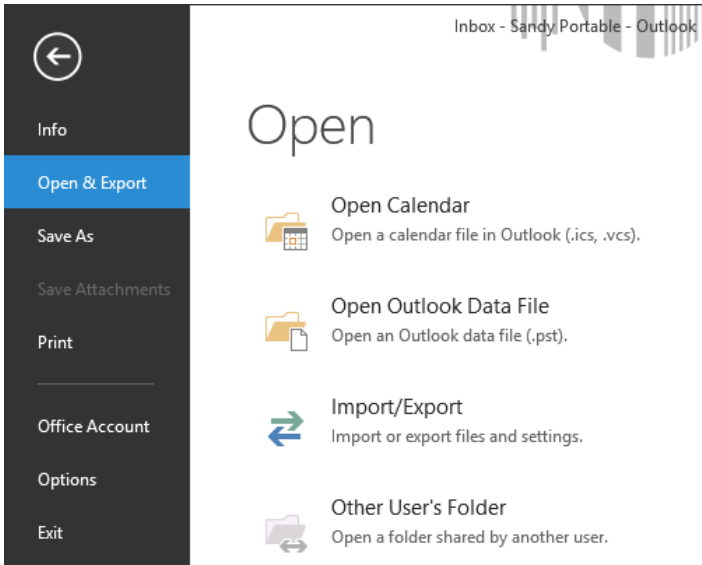
This option would appear on the File Info tab if this account was set up to work with Exchange. Here are the screens you would see with an Exchange account. You can set dates and times for the Automatic Replies to start and end. You can have 2 messages: Inside and Outside your Organization.





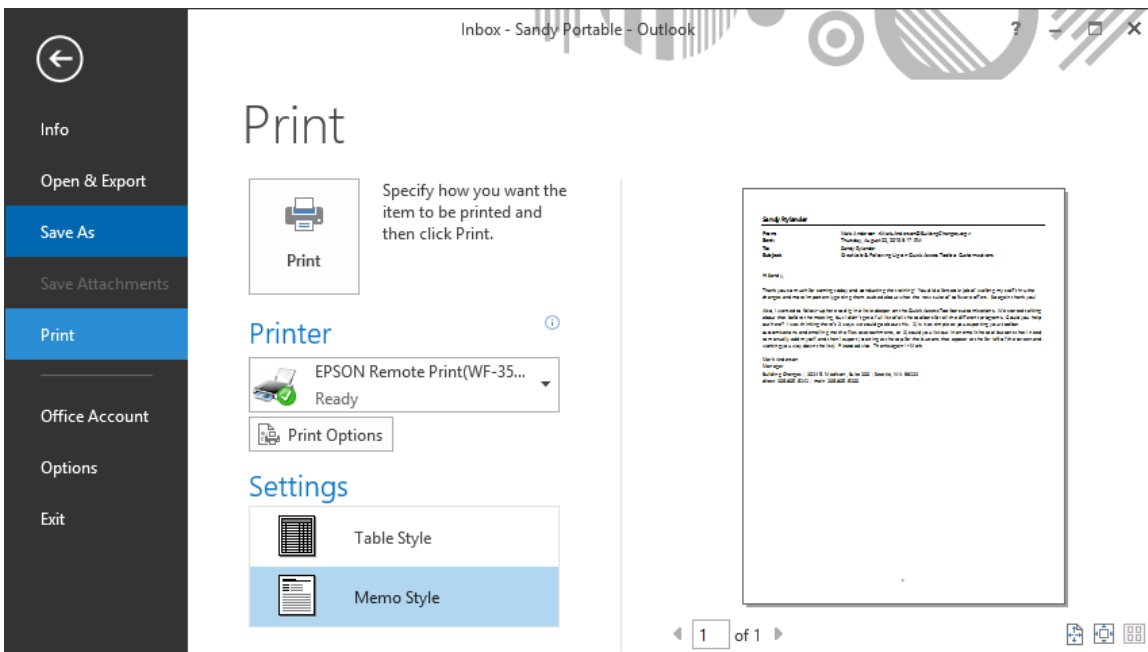
**File, Open and Export**

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.

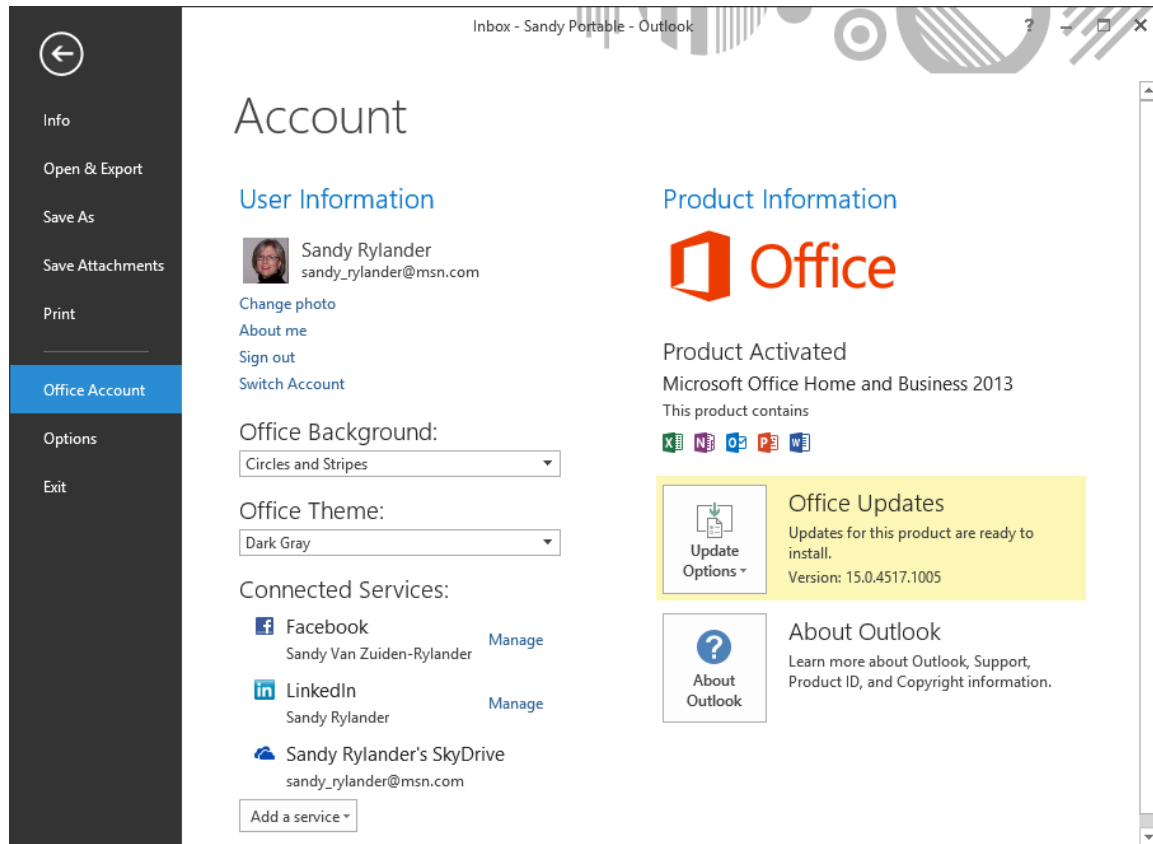


### File, Save and File, Save Attachments

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

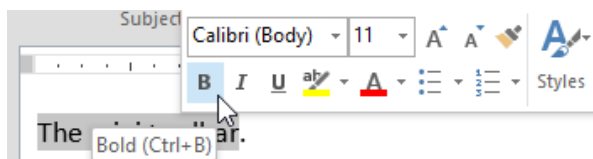
### File, Office Account

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:

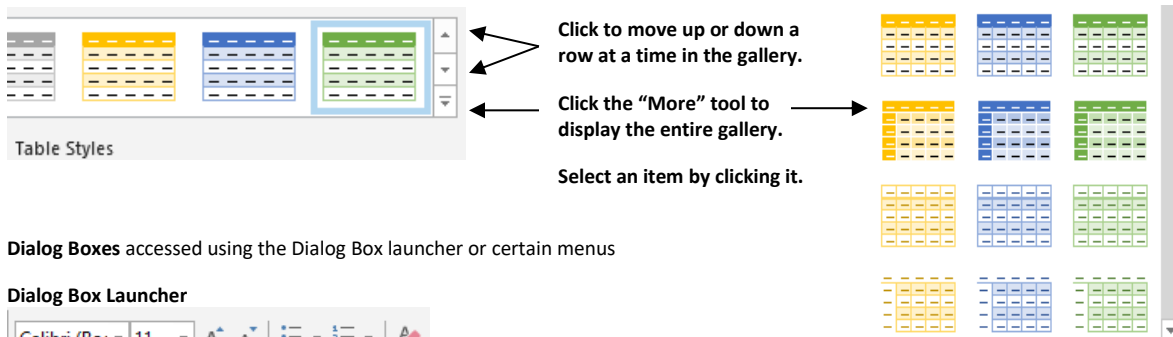
- Use the Mini Toolbar to Underline the words “The Mini Toolbar”
  1. Type “**The Mini Toolbar** allows you to quickly format”.
  2. Select the words “Mini Toolbar” and watch the Mini Toolbar appear. Bold the selected words by clicking the “B” (bold) tool.

## Galleries and Dialog Boxes

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.

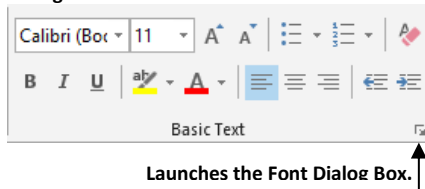
Some dialog boxes are still available in Outlook 2013. Dialog boxes can be accessed using the Dialog Launch arrows at the bottom right of some groups on the ribbon and they can be accessed through some menu items that have “More” or “Custom” as an option. For example, the Columns menu has More Columns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

Shape Styles Gallery on the Drawing Tools Format tab



Dialog Boxes accessed using the Dialog Box launcher or certain menus

Dialog Box Launcher



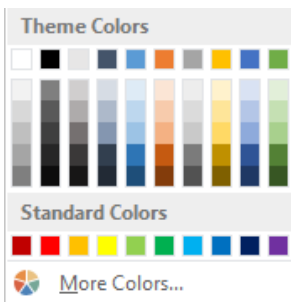
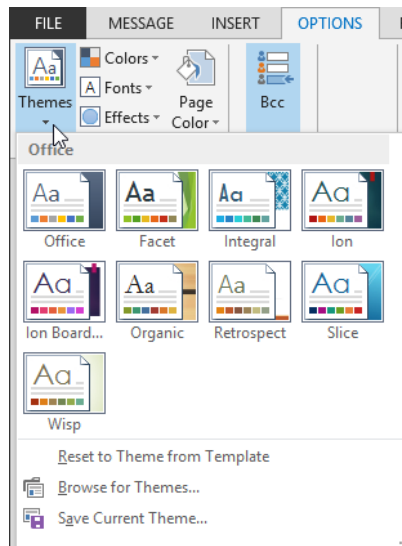
### Exercise:

- 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.

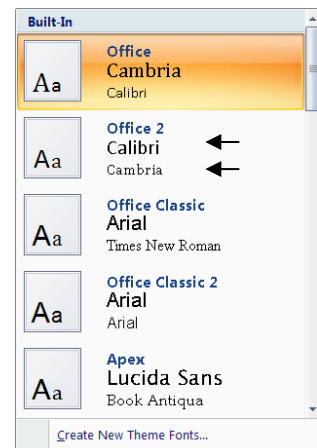


### Theme Colors vs. Standard Colors

**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.

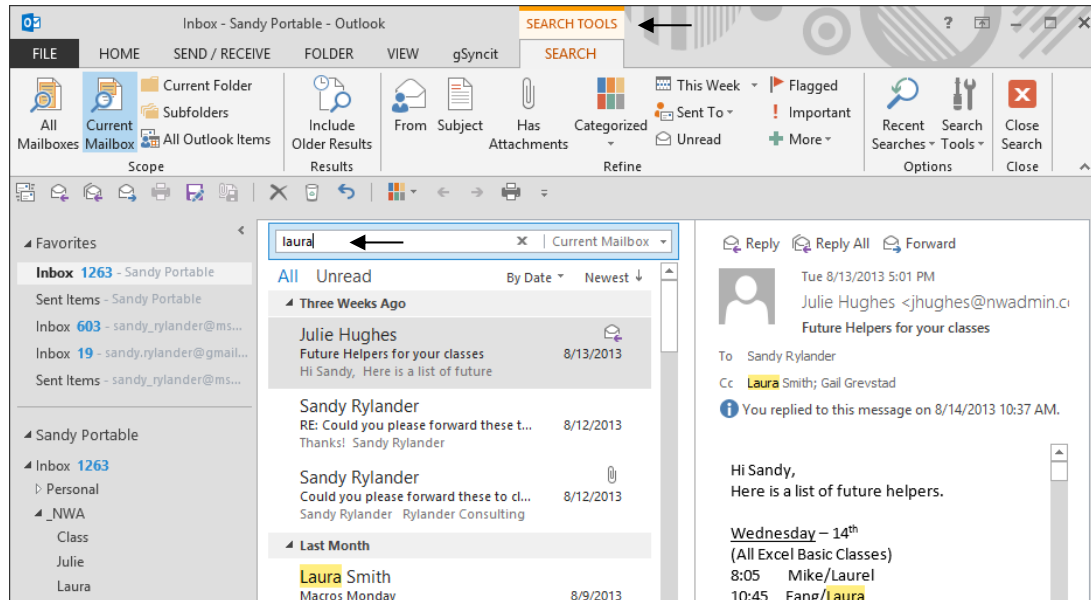
### Theme Fonts

**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!

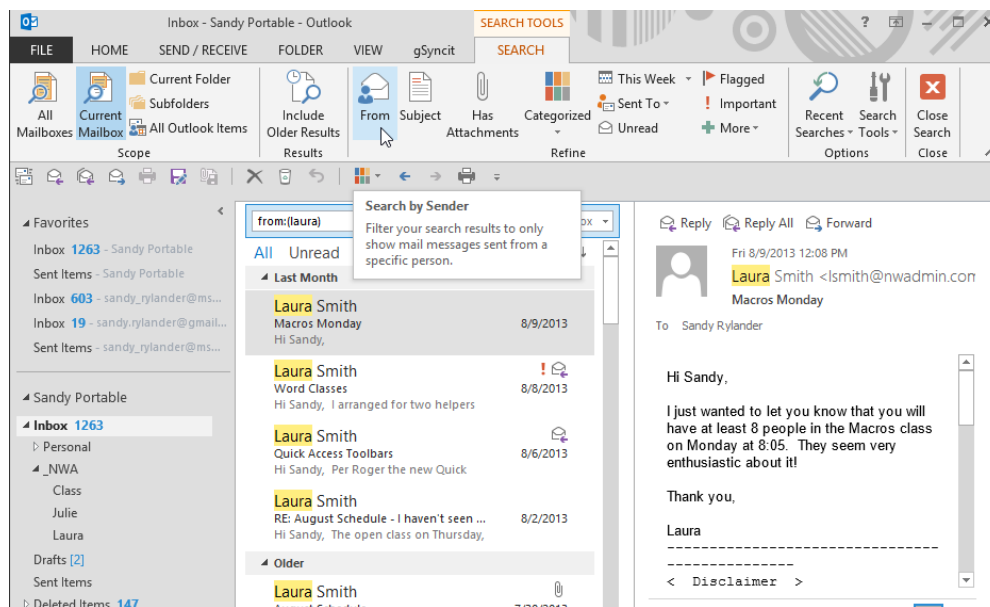


## Narrowing the Scope of the Search

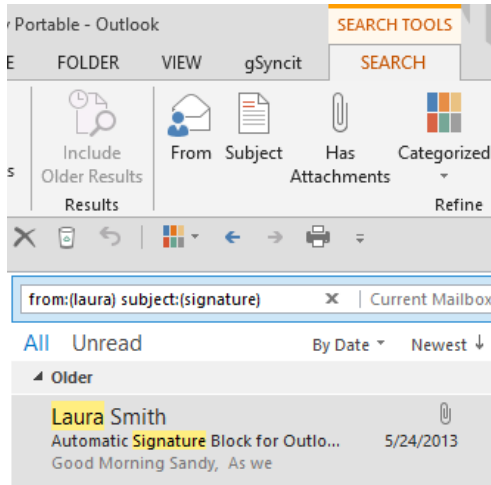
Reduce the time it takes to find an item using the Search tab options.

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.



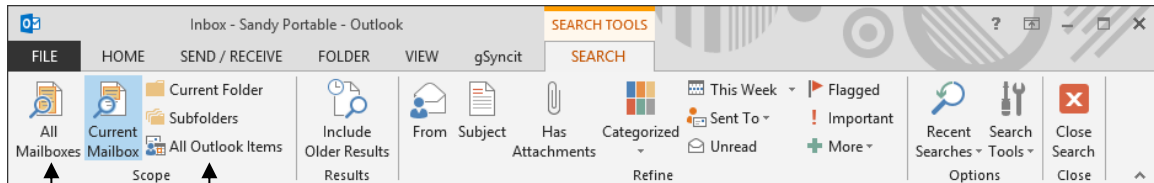
- Click back in the Search box after from(laura), click the **Subject** tool and type signature (or some other subject that you know the sender used) in an email sent to you. Notice how quickly you find the message you need.



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

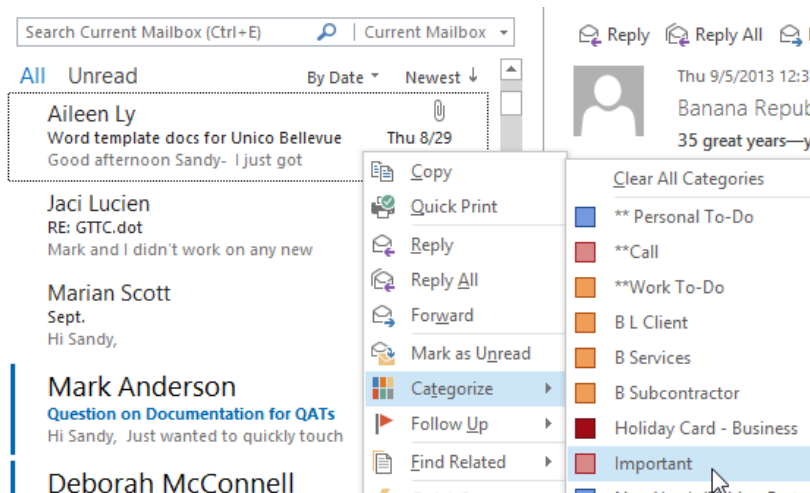
### Expanding the Scope of the Search

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.



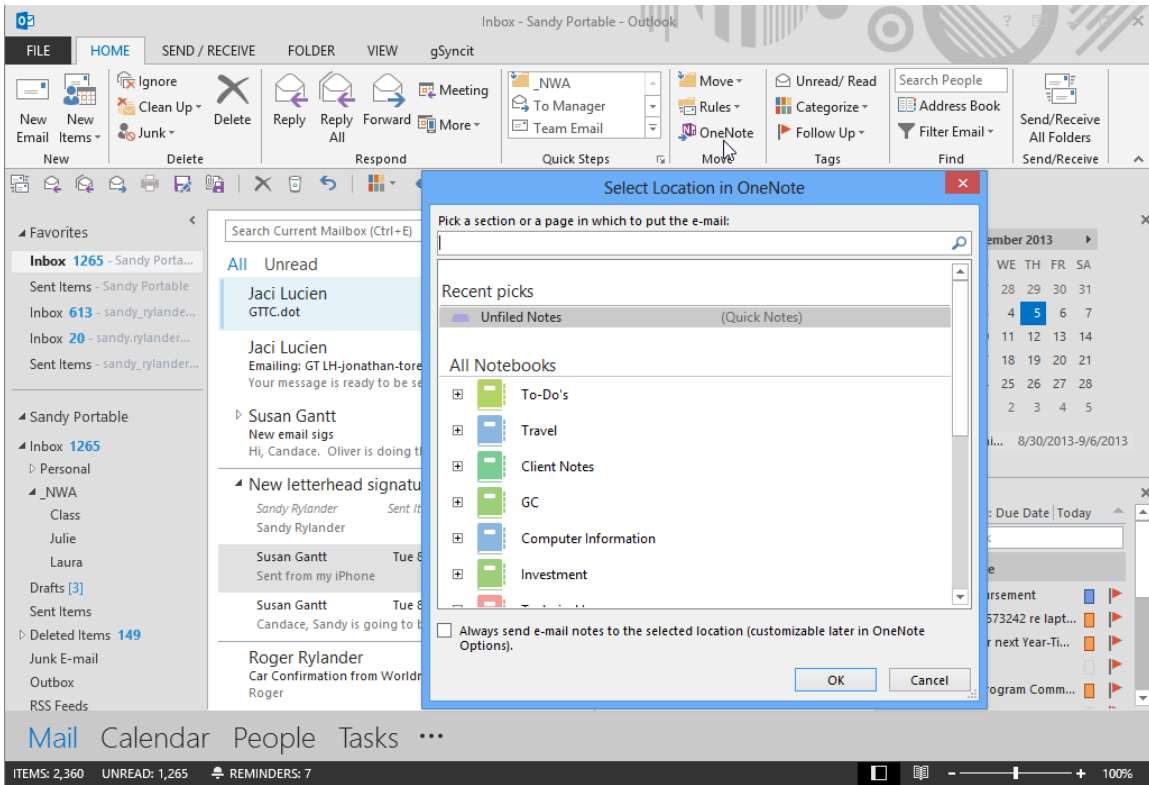
### Color Categories

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

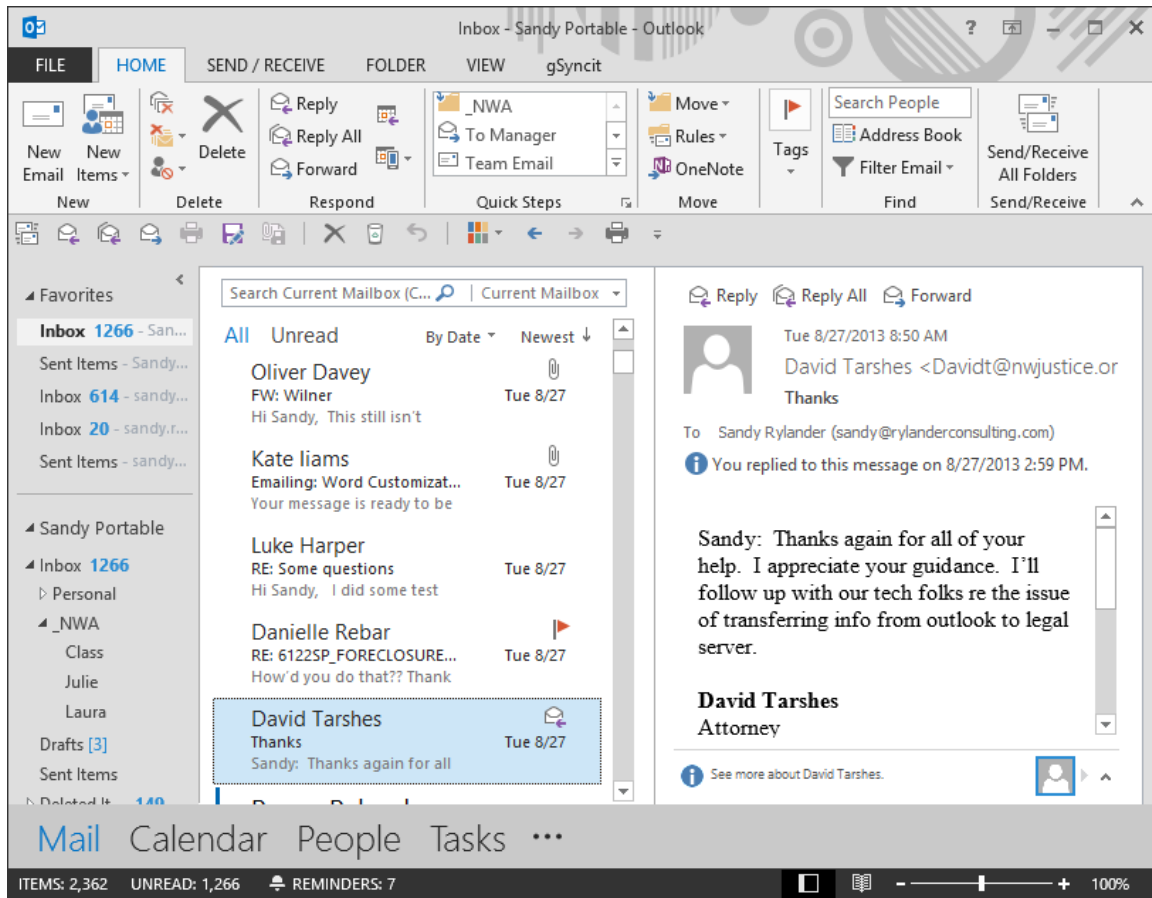
- Spell Check Subject Line
- Contextual Spelling
- Auto-Complete Improvements
- Reply/Reply All Improved
- Forgotten Subjects
- Attachment Reminders
- Email Etiquette

### Other Tools

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

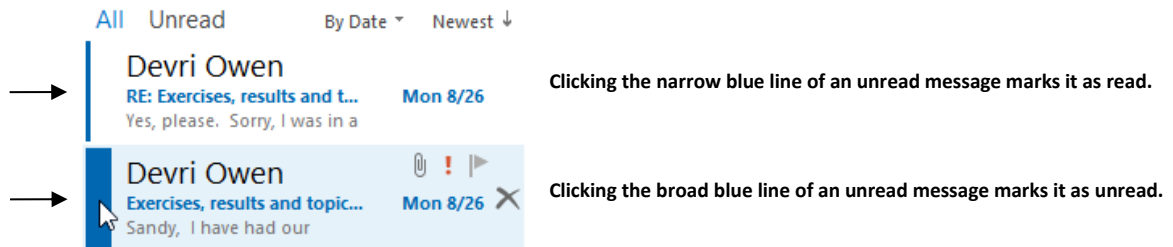


## Messages View



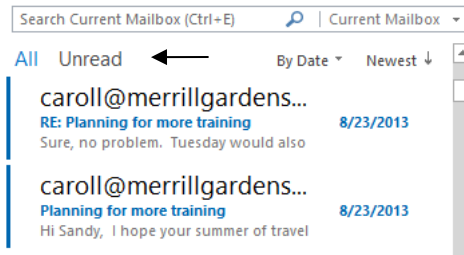
### New Display of Read/Unread – New in 2013

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.



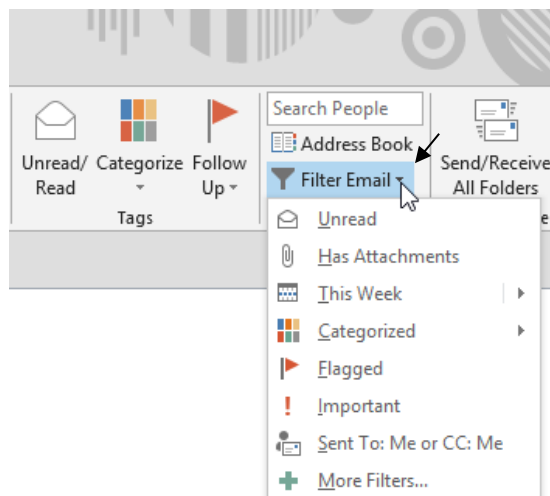
### View All or View Unread Buttons above the Messages Window – New in 2013

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.

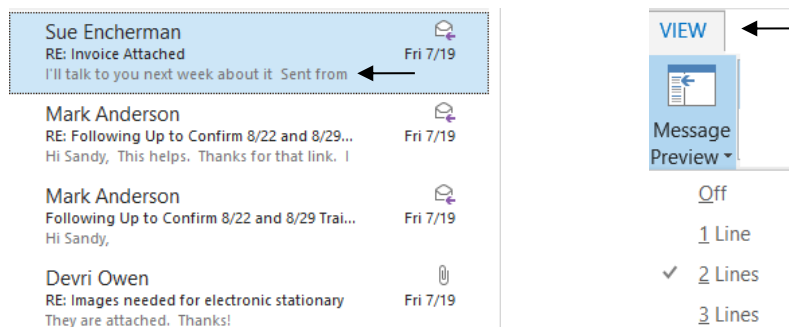


### Preview messages – New in 2013

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**.



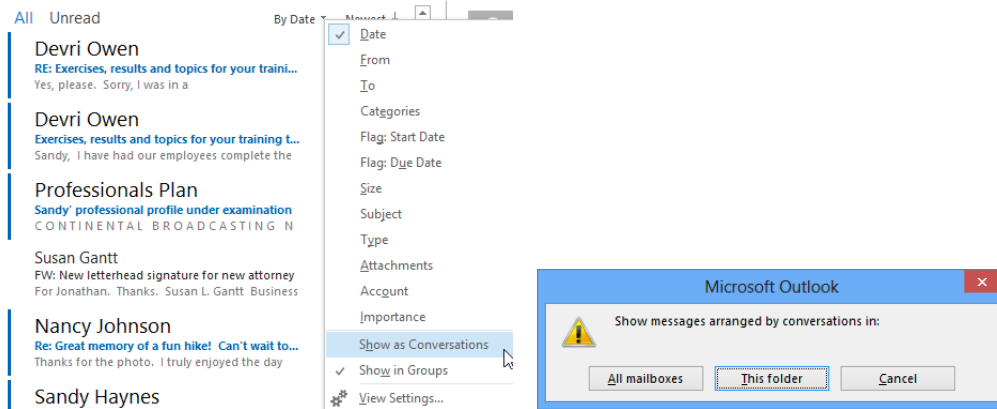
### Conversations

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

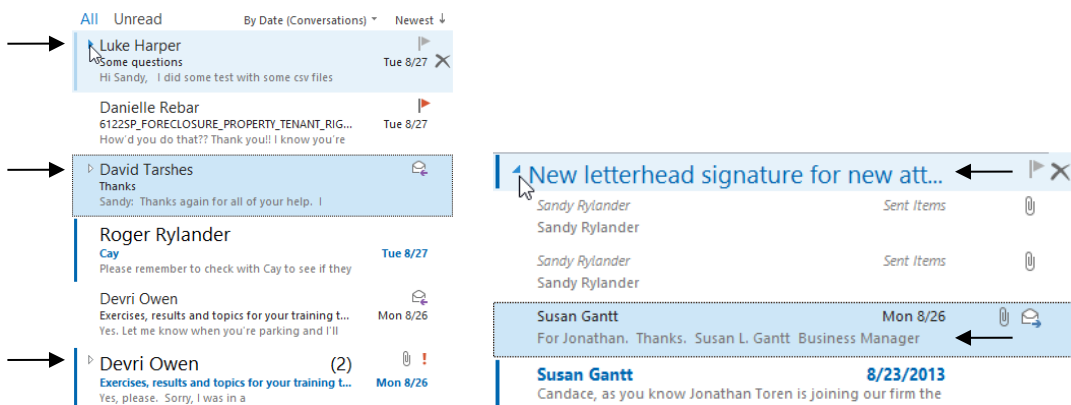
- **Select Conversation View**

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



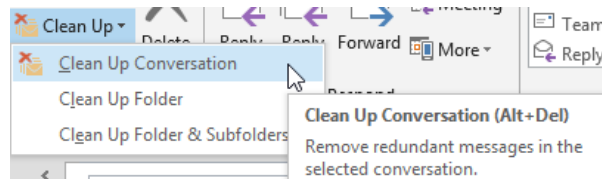
2. **Conversations appear with arrows on the left of the email message. Click the arrow to display the conversation.**

*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.*



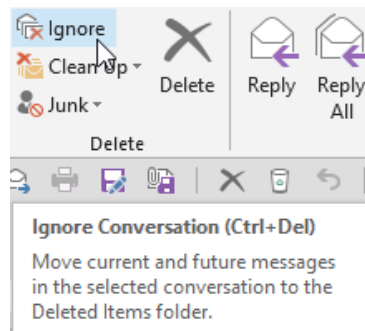
### Clean Up Conversations

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.



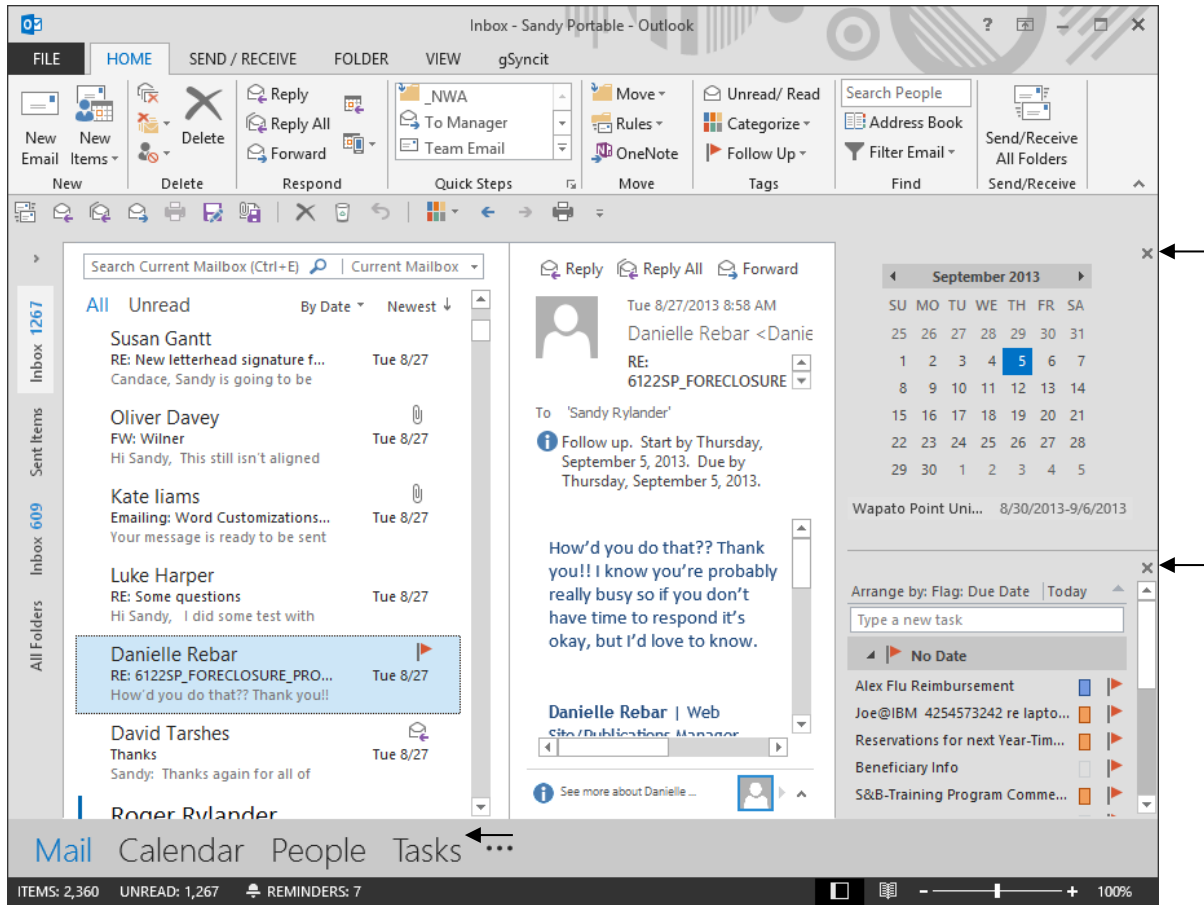
### Ignore Conversation

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)

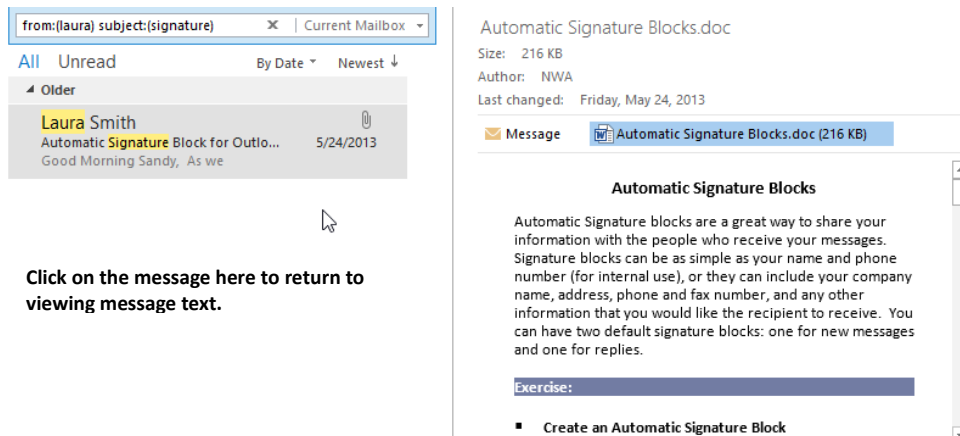
The To-Do Bar in Outlook 2010 displayed Tasks and Calendar while viewing your inbox. That feature has been replaced with docking Sneak Peeks. When you point to the Tasks or Calendar at the bottom of the Outlook screen, a Sneak Peek appears. Clicking on the docking icon in the upper right corner, docks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



Click on the message here to return to viewing message text.

## Save Attachments

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

### Exercise:

#### ▪ Save an Individual Attachment

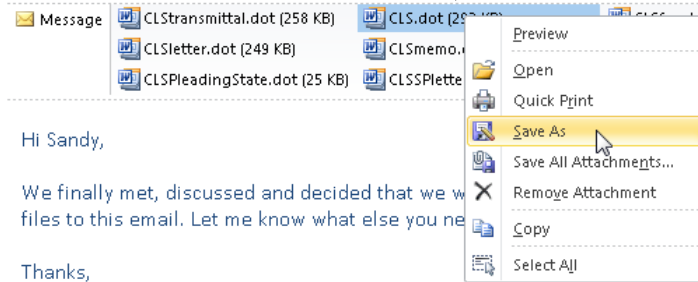
1. Select the email with the desired attachment.
2. Right click the Attachment.
3. Select **Save As**.

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

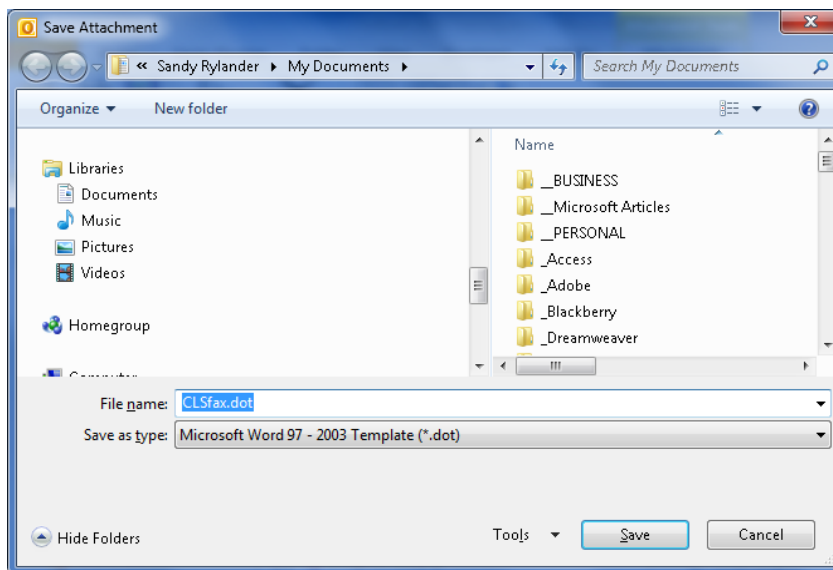
Mike Katell <Mike.Katell@ColumbiaLegal.org>

Sent: Thu 7/22/2010 3:52 PM

To: Sandy Rylander



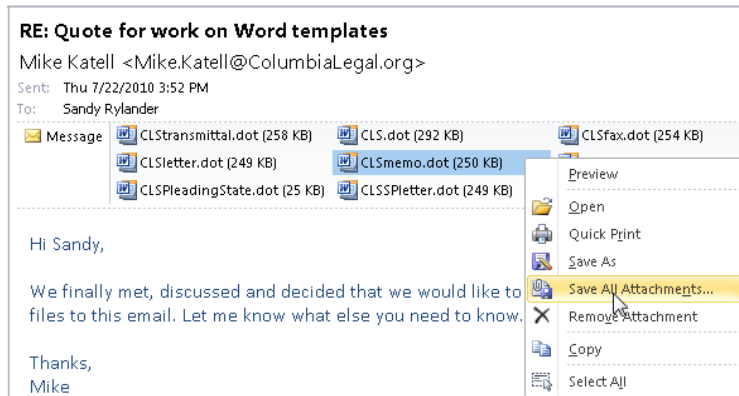
4. The Save Attachment dialog box will appear to allow you to **select the folder** in which you wish to place the attachment.



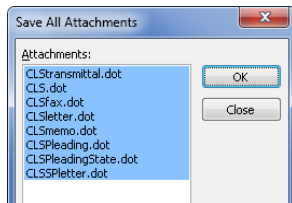
5. After selecting the desired folder, click **Save**.

- **Save Multiple attachments**

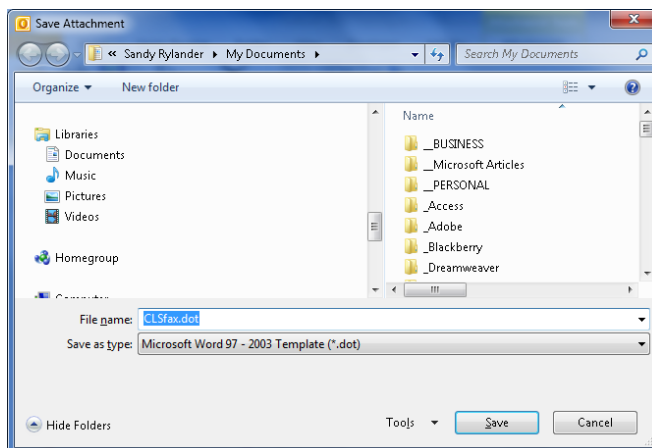
1. **Select the email with the desired attachment(s).**
2. **Right click any attachment.**
3. **Select Save All Attachments.**



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**.



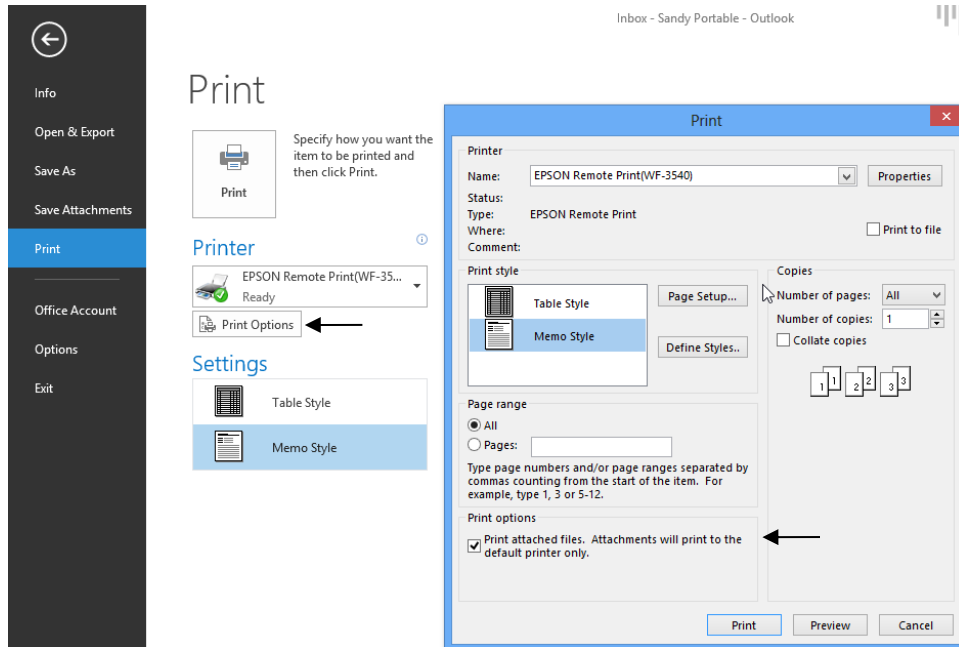
5. The second **Save All Attachments** dialog box appears. Select the folder where you wish the files to be saved. Click **OK**.



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**.



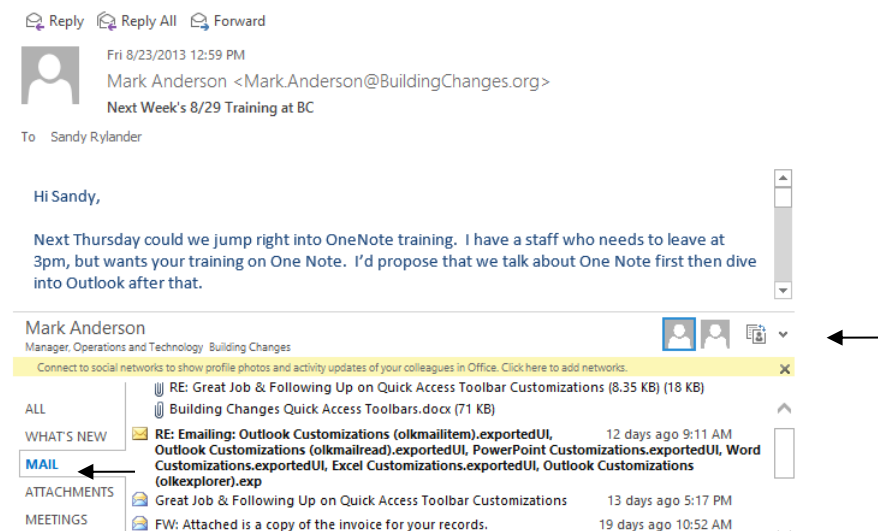
### People Pane

Brings social views of friends/contacts into your inbox with a stream of content from 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:



2. The People Pane displays:





**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.

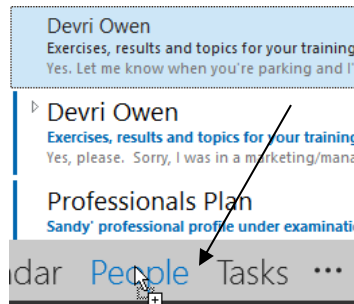
For instance, by simply dragging an email to the Contacts folder, Outlook will AutoCreate a new Contact with the name and address already filled in! You can also drag an email to a task folder and Outlook will AutoCreate a Task. Drag an email to the calendar to AutoCreate an appointment.

**Exercise:**

▪ **AutoCreate a Contact from an Email Message**

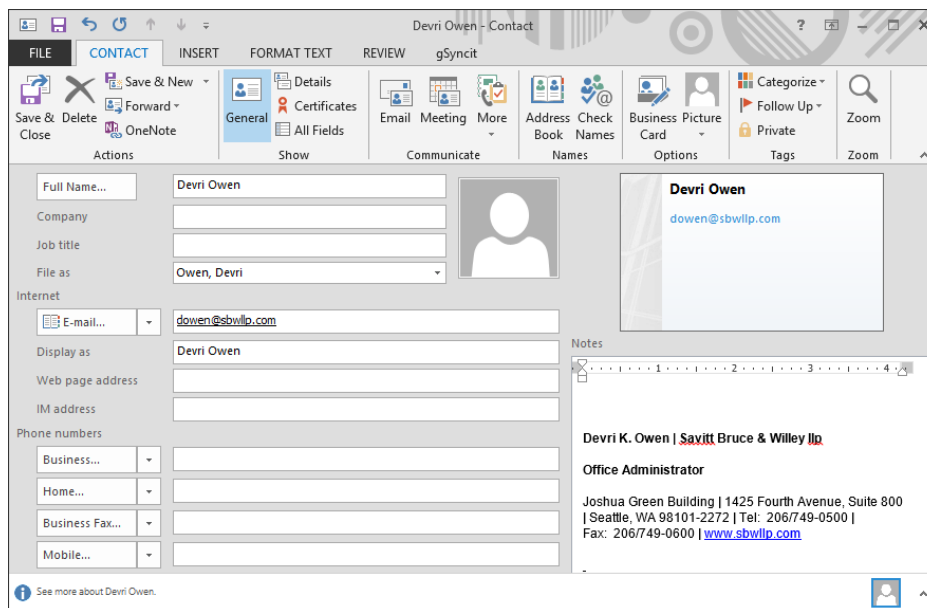
1. **Drag a Message to the People folder.**

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



Drag message to the People folder.

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.**



- 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.

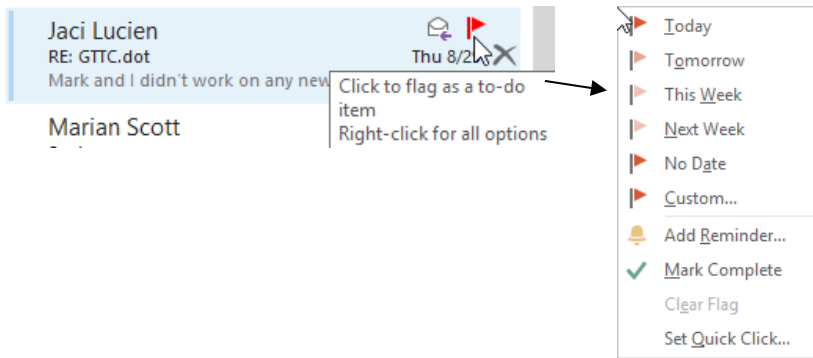
Outlook AutoCreates a Task with the subject filled in. The body of the message is placed in the Task's Notes area.

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**.

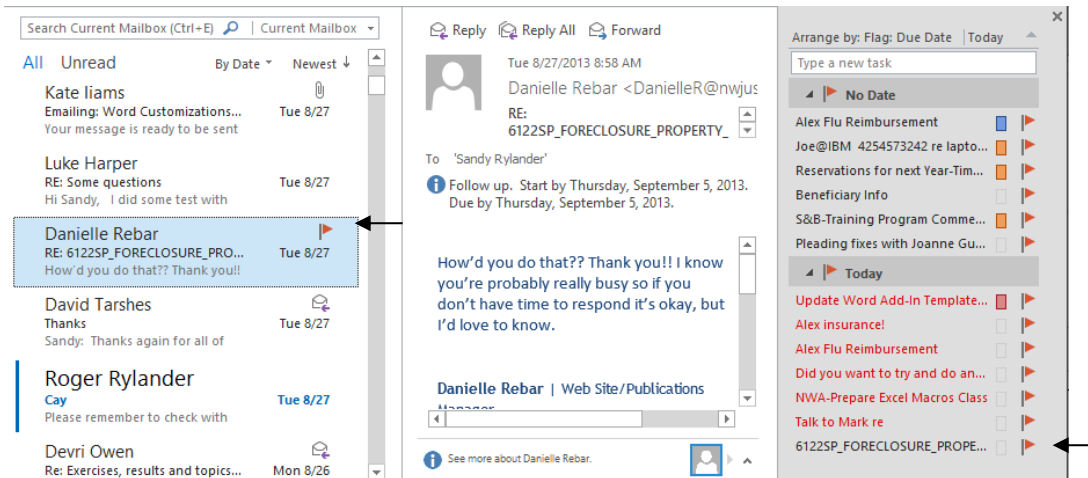
Create a Task from an Email with a Click

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

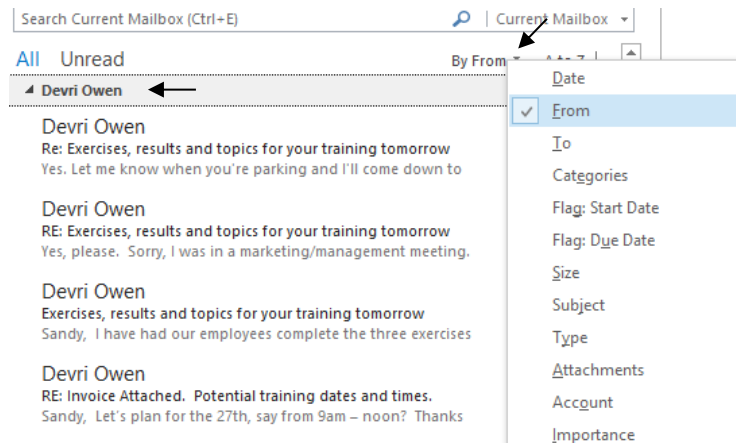
Grouping, Sorting, and Finding Messages are all very useful features. They can help you retrieve important messages, delete obsolete messages, and organize messages into folders. Below are samples of what each of them does.

**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.**

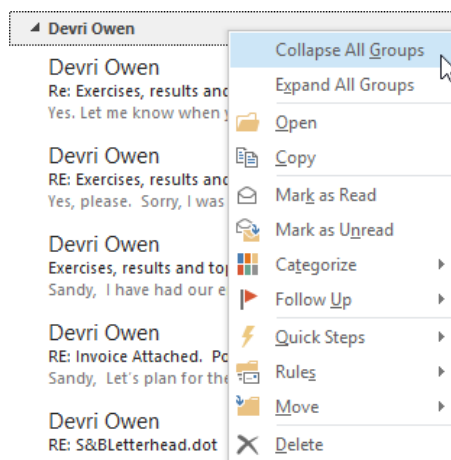
1. On the By drop down at the top of the messages view, click the By **From**.  
*Notice that messages are now grouped by from instead of date.*



These messages are Grouped by From. Notice the headings are Senders Names.

A **-** next to a heading indicates that messages can be hidden by clicking the **-** which collapses the group.

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**.



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**.

The screenshot shows the Outlook interface. On the left, the 'By Date' dropdown menu is open, showing options: Date (checked), From, To, Categories, Flag: Start Date, Flag: Due Date, Size, Subject, Type, Attachments, Account, Importance, Show as Conversations, Show in Groups (unchecked), and View Settings... An arrow points to the 'Show in Groups' option. On the right, the email list is sorted by date (Newest on top) but not grouped. The messages are:

- Carol LaMotte (8:09 AM)
- Greg Dunfield (Wed 9:28 AM)
- Amazon Local (Wed 6:41 AM)
- Greg Dunfield (Mon 10:11 PM)
- Wells Fargo Online (Sun 11:06 PM)

These messages are **Sorted** by date but not grouped. Notice there are no headings, so they are **not grouped**.

#### Change the Sort Order to Sort Ascending or Descending – in By From View

1. Click the drop down to the right of **Newest**.

The screenshot shows the Outlook interface. The 'By From' dropdown menu is open, showing options: A to Z (selected), Z to A, and Date. An arrow points to the 'A to Z' option. The email list is sorted by sender (Carly Kelly).

#### 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**.

The screenshot shows the Outlook interface. The 'By Date' dropdown menu is open, showing options: Newest (selected), Oldest, and Date. An arrow points to the 'Newest' option. The email list is grouped by date, with the following groups:

- Carol LaMotte (8:09 AM)
- Greg Dunfield (Wed 9:28 AM)

## Folders

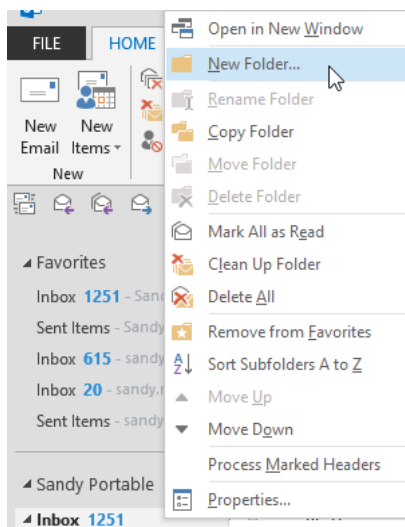
### Create Folders to Organize Messages

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.

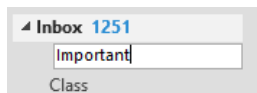
#### Exercise:

##### ■ 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.*

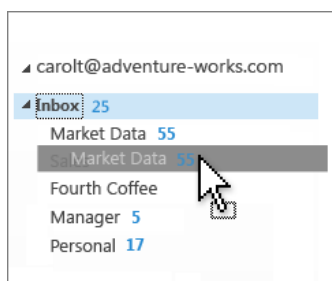


2. Type the **folder name** and press **Enter**.



### 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.



### 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.

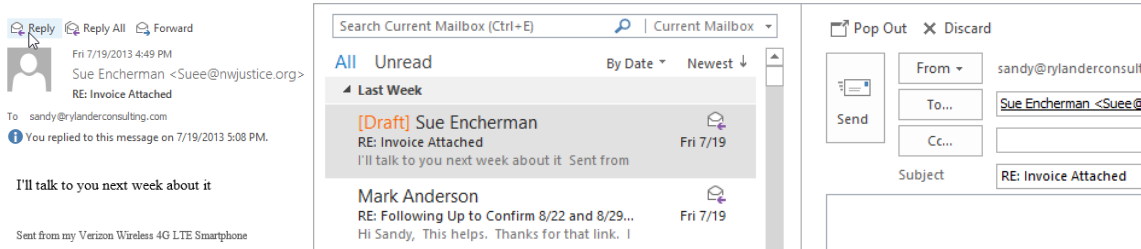
#### Exercise:

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

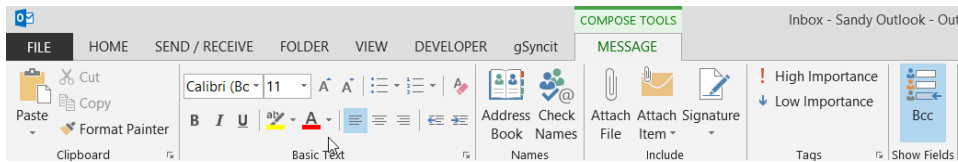
## Replying to a Message

### Inline replies – New in 2013

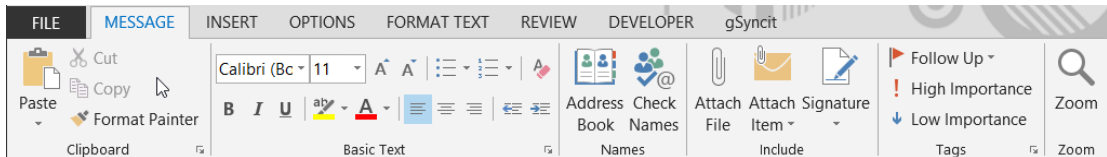
Reply by typing your response right in the Reading Pane. This allows drafts to be saved automatically! Notice the word [Draft] appears in your email list reminding you to complete the email. Not all formatting options are available Inline. To access additional options, select Pop Out.



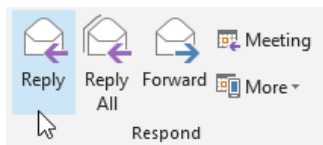
### Inline Options



### Pop Out Options



### Using the Ribbon



## Exercise:

### Reply to a Message

1. Select the email you wish to respond to and click the **Reply** tool on the Home tab.
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

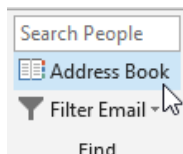
Distribution lists come in two forms:

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.

### Exercise:

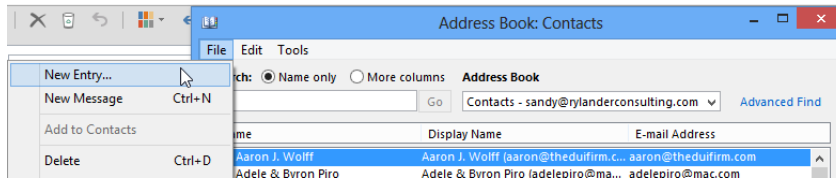
- **Create a Distribution List**

1. Select your **Contacts** Folder.
2. On the Home tab, select **Address Book**.

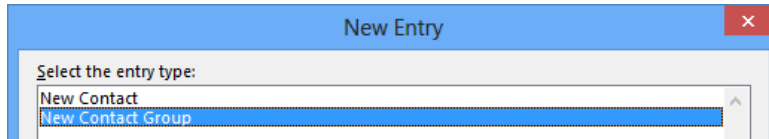




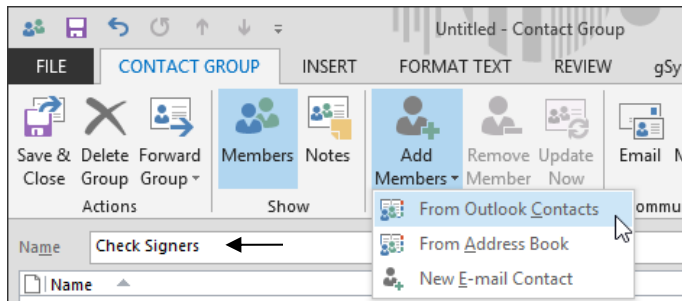
3. Select **File, New Entry**.



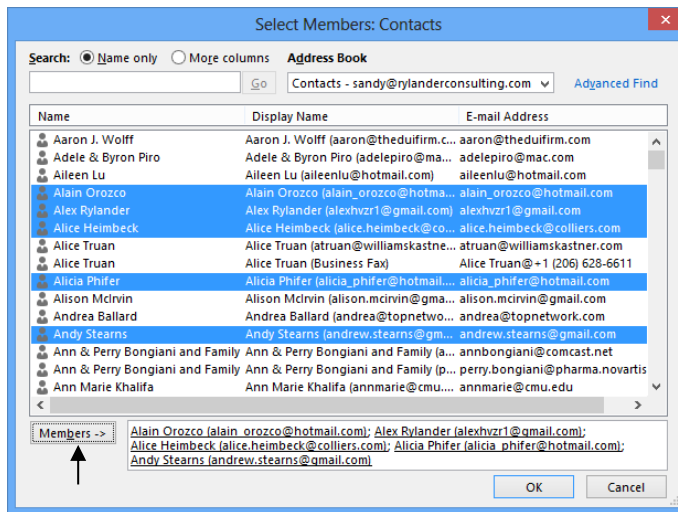
4. Select **New Contact Group**. Click **OK**.



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.



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



## Create and Send a Message

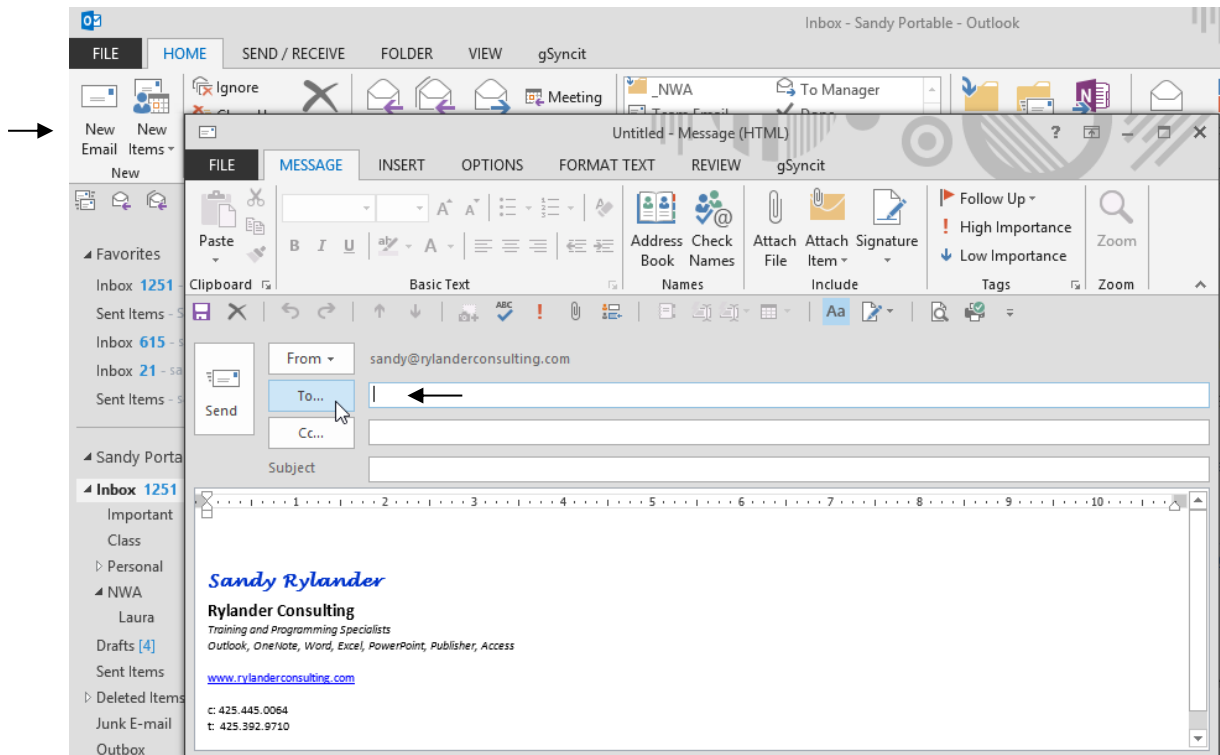
### Create a Message

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.*

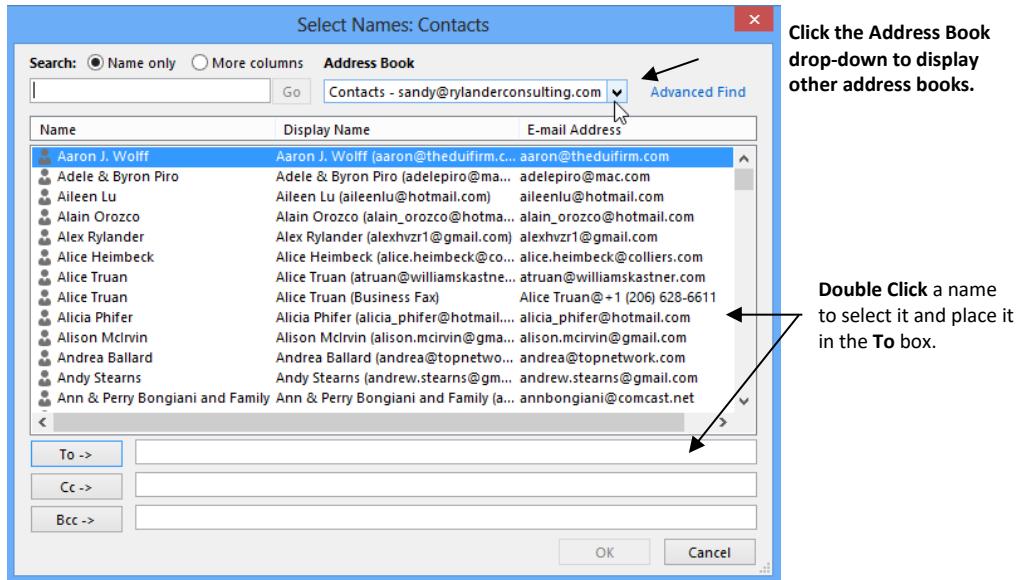


#### ■ Add a To Recipient using the To Button

*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.

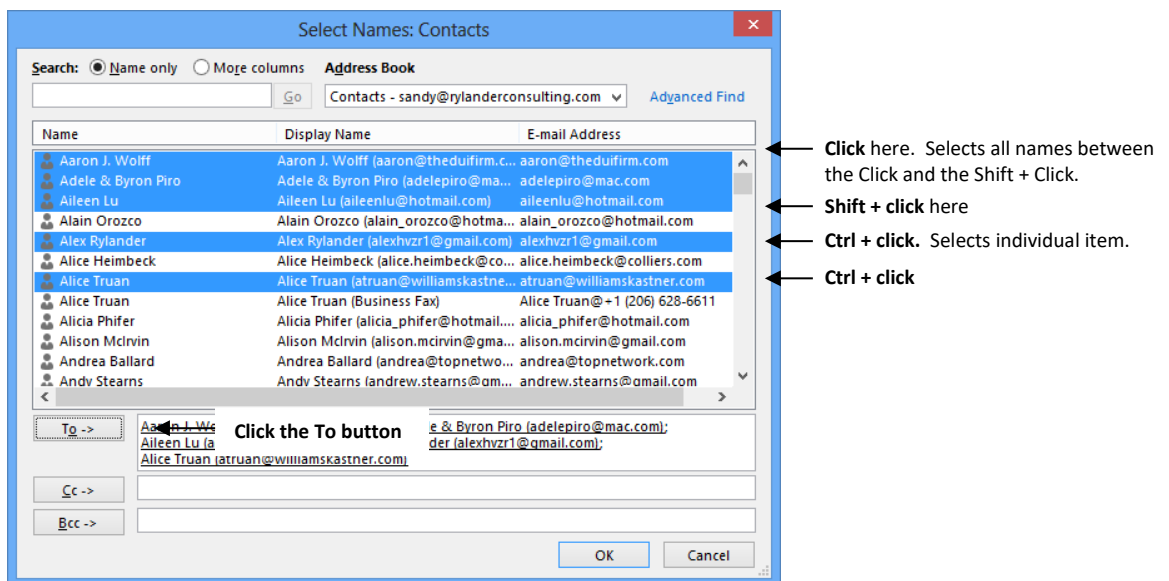
2. Click the **Address Book** drop-down arrow in the dialog box to display other address books. *The **Global Address List** contains internal email addresses where **Contacts** contains addresses you have entered.*
3. **Start typing the recipient's name** to quickly find the name on the list.



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

▪ **Add Multiple Recipients using the To Button**

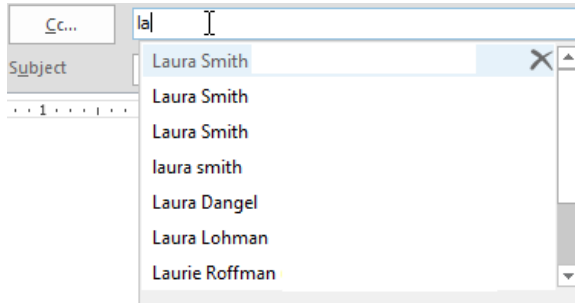
1. **Click the first name and shift + click the last.**  
*Selects all names from where you click to where you shift click.*
2. **Ctrl + click** to select or deselect subsequent names.  
*Selects or deselects names that you ctrl + click.*
3. Then click to **To** button in the Select Names box to add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



### ▪ 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.

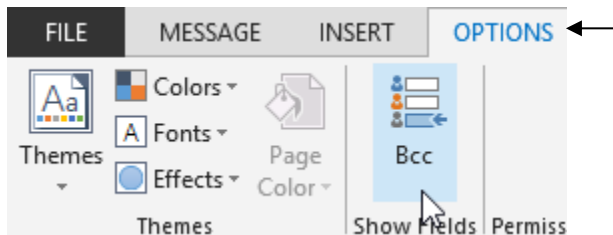


### ▪ Add Multiple BCC (blind carbon copy) Recipients using an Email Address Book

1. 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.

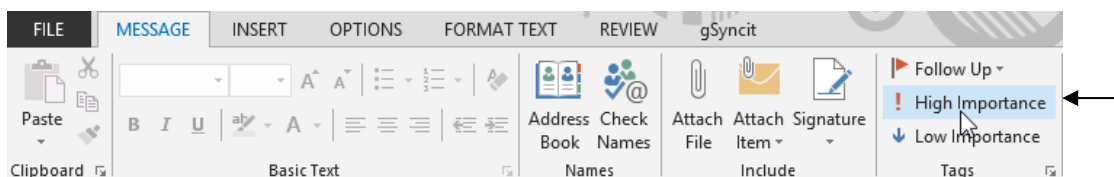


2. **Click** the first name and **shift + click** the last.  
*Selects all names from where you click to where you shift click.*
3. **Ctrl + click** to select or deselect subsequent names.  
*Selects or deselects names that you ctrl + click.*
4. Then click to **BCC** button to add the names to the BCC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

### ▪ Send Message with High Importance

1. 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

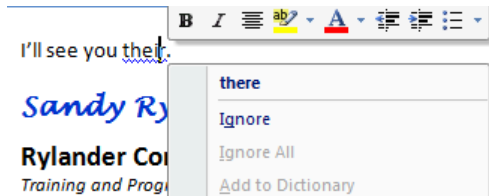
2. Type the **Subject** and the **body** of the message.

### 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.



### 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.



### 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.

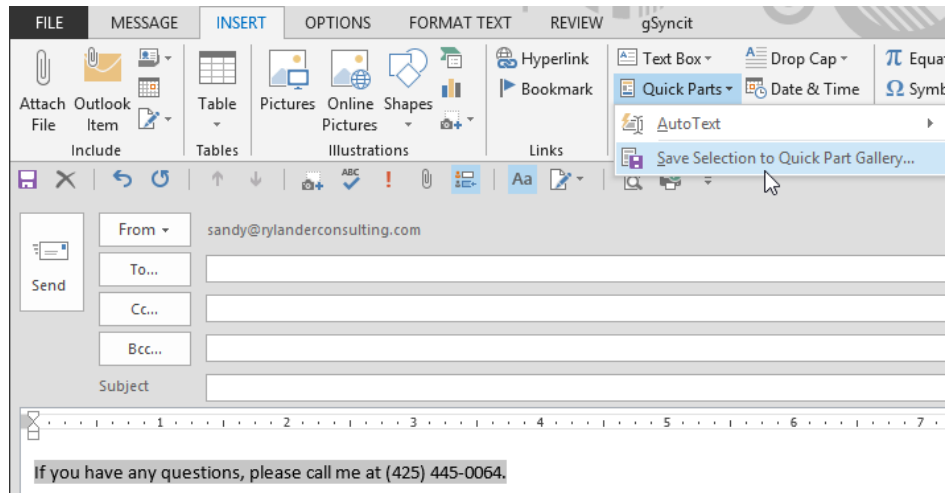


## Quick Parts

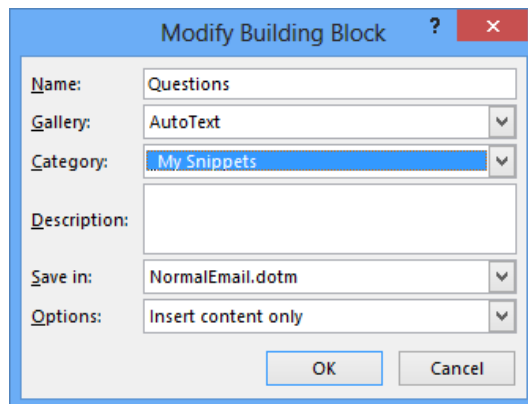
Quick Parts gives you the ability to store text and easily insert it into future email simply by selecting it from a drop-down list. Quick Parts can not only save small portions of text, but pages of text and graphics. You can create Table and Quick Part Building Blocks in just seconds. Saving these 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.*



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**.

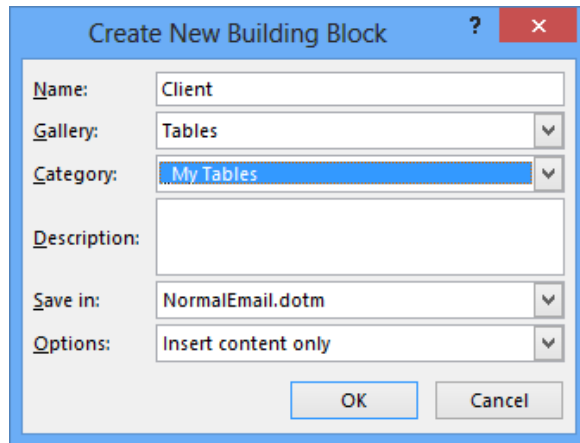


### Insert a Quick Part

1. 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

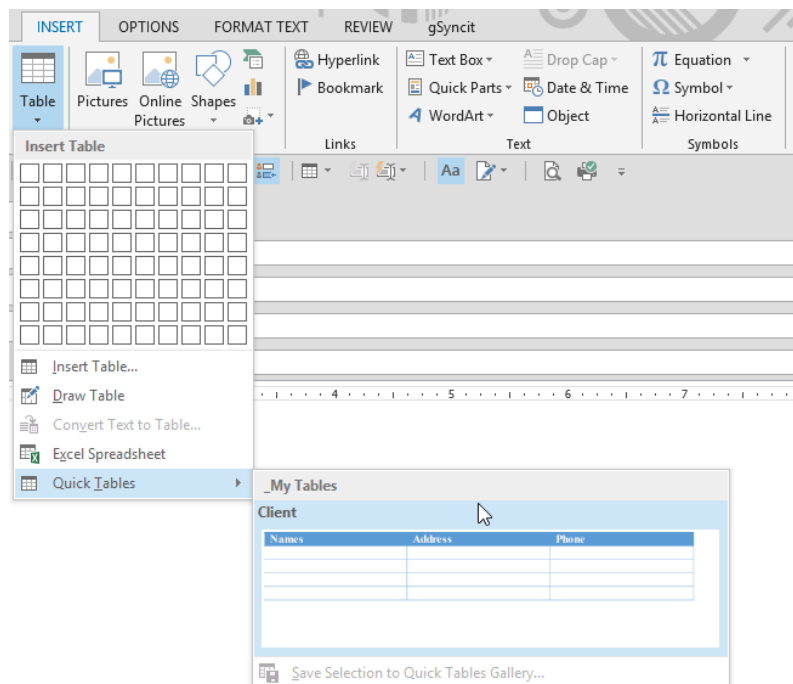
1. Select the table you wish to save to a Quick Table.
2. On the Insert tab of a new email select **Quick Parts, Save Selection to Quick Part Gallery**.  
*Make sure you are in the body of the email or the dialog box will be disabled.*



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

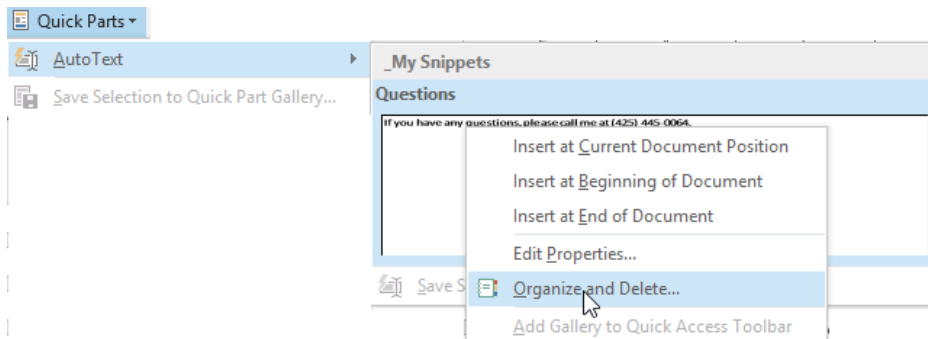
1. Click in the body of an email where you want the Quick Table inserted.  
**Select Insert, Table, Quick Tables, click on the desired Quick Table (i.e. Client).**



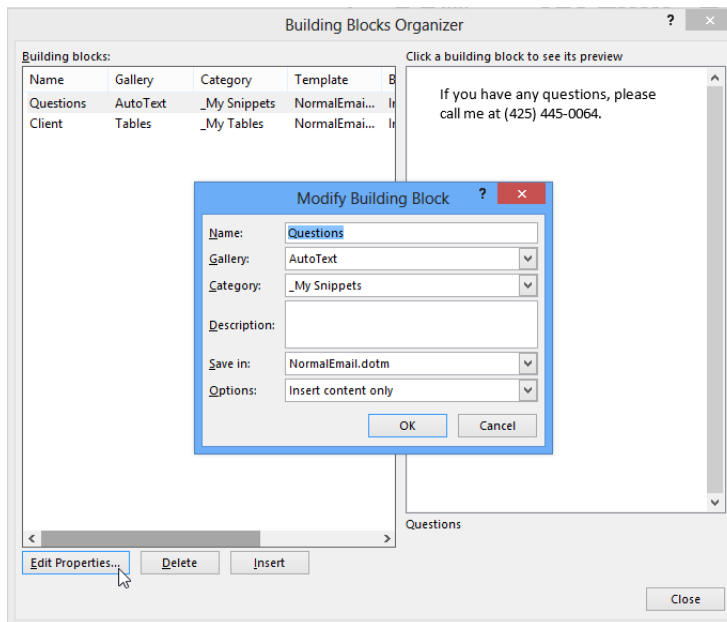
### Organize and Delete Quick Parts

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...**



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

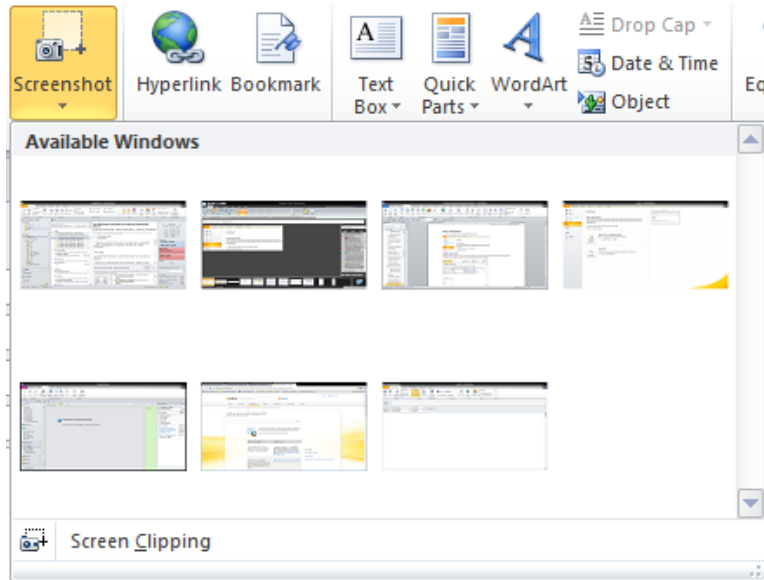


3. Click **Close** when done.



### 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.



#### Exercise:

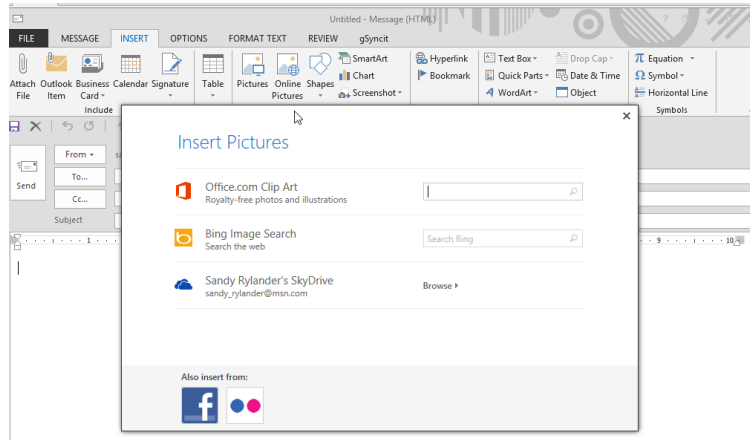
- **Add a Screenshot to a message.**
  1. Click in the body of a message and select **Insert Screenshot**.
  2. Select one of the screens from the Available windows.  
*The shot will be added at the insertion point.*
  
- **Add a Screen Clipping to a message.**
  1. View the screen you want to clip in 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**.
  3. 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.*

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.

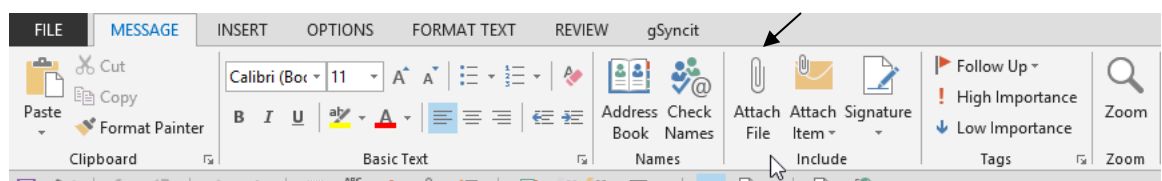
### Add File Attachments

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

### Exercise:

#### ■ Attach a Single File

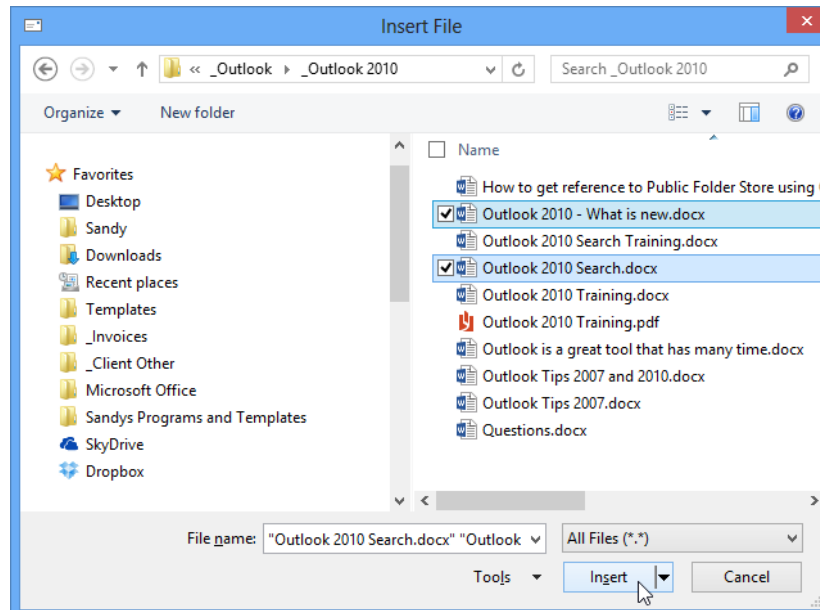
1. Click the **Attach File** tool on the Message tab.



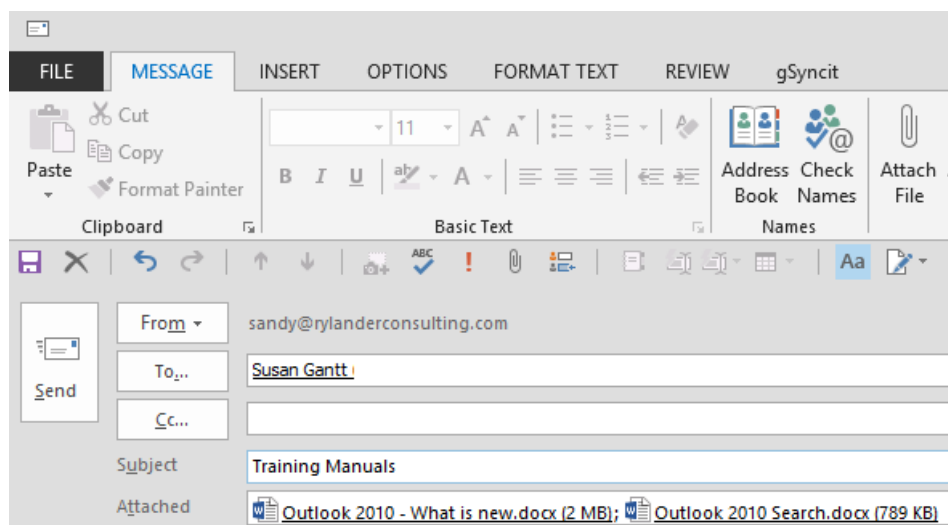
2. When the Insert File dialog box appears, select the desired folder and file.
3. **Double click the file.**

- **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.*



3. When the message is complete click **Send**.

## Send Outlook Item Attachments

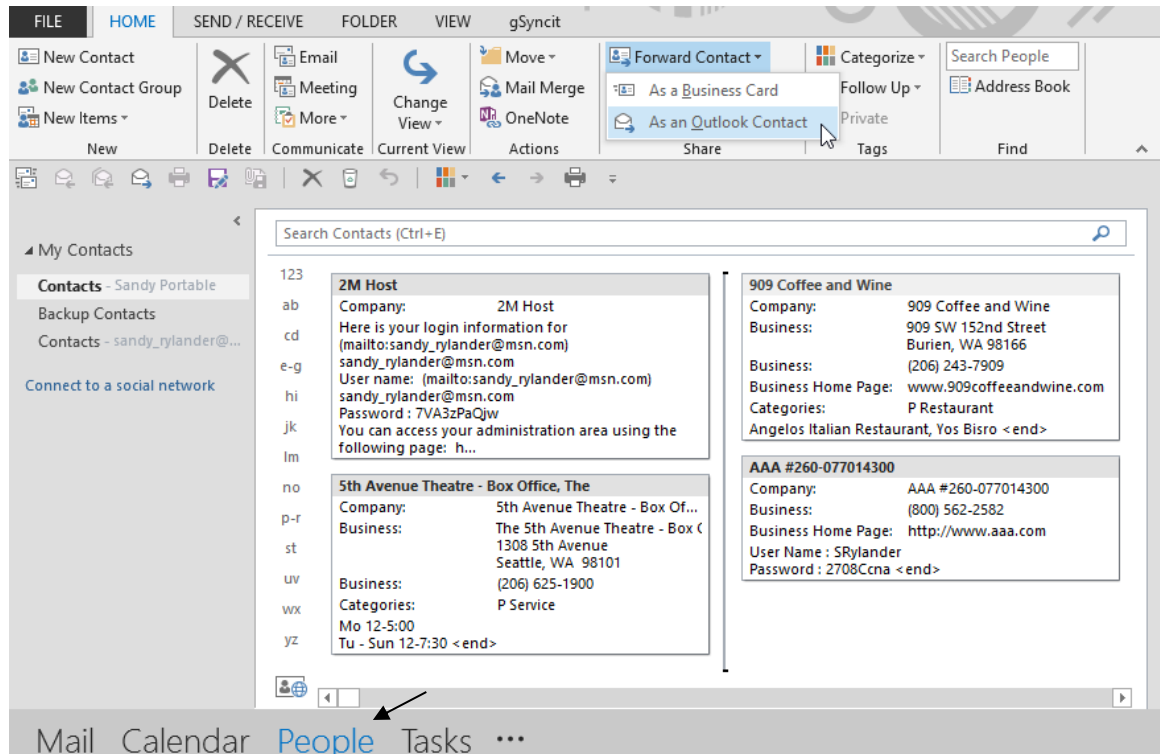
This is a great way to share information with others, or to send information to your home computer.

### Exercise:

#### ■ 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.

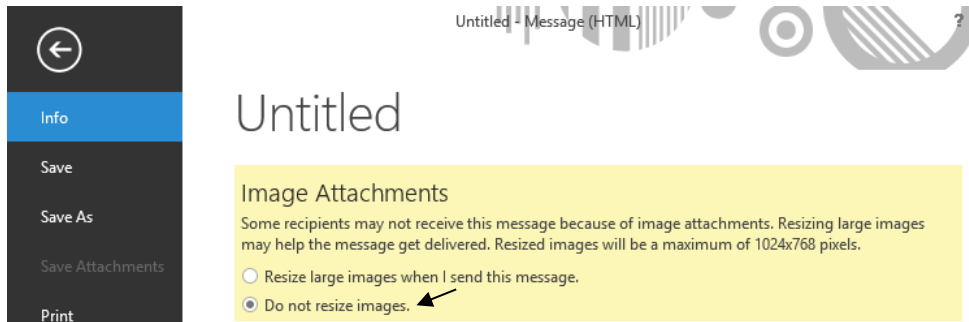
##### 1. Select People view.



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.



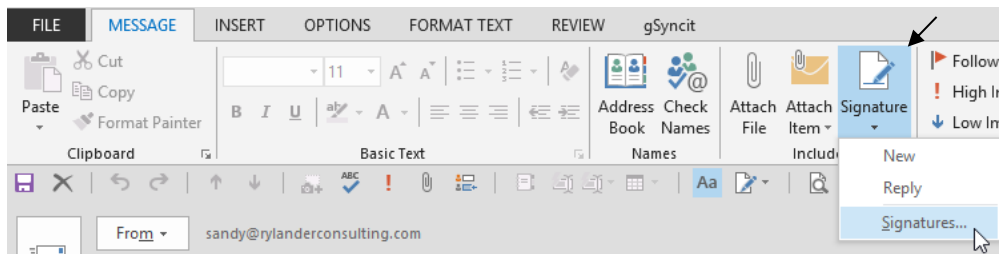
### Automatic Signature Blocks

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.

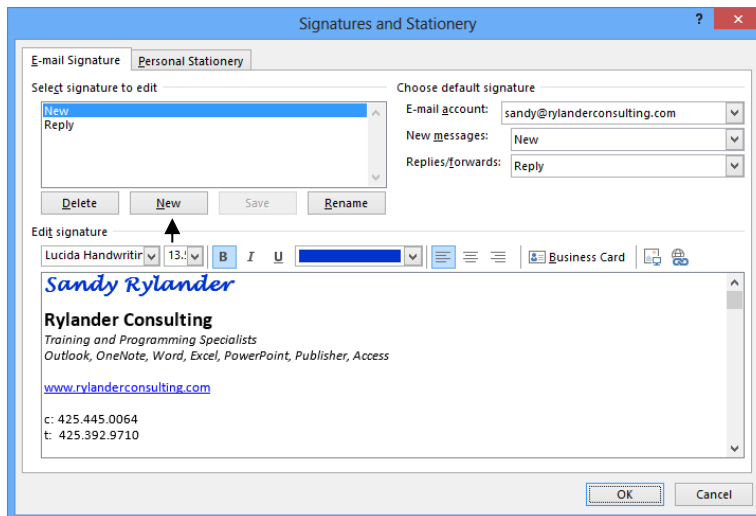
#### Exercise:

- **Create an Automatic Signature Block**

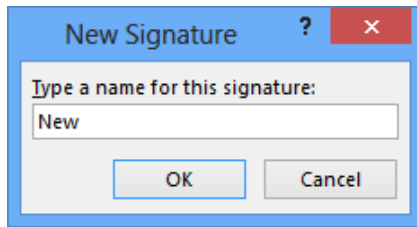
1. Make sure you are in an email message and select **Signature, Signatures on the Message** tab.



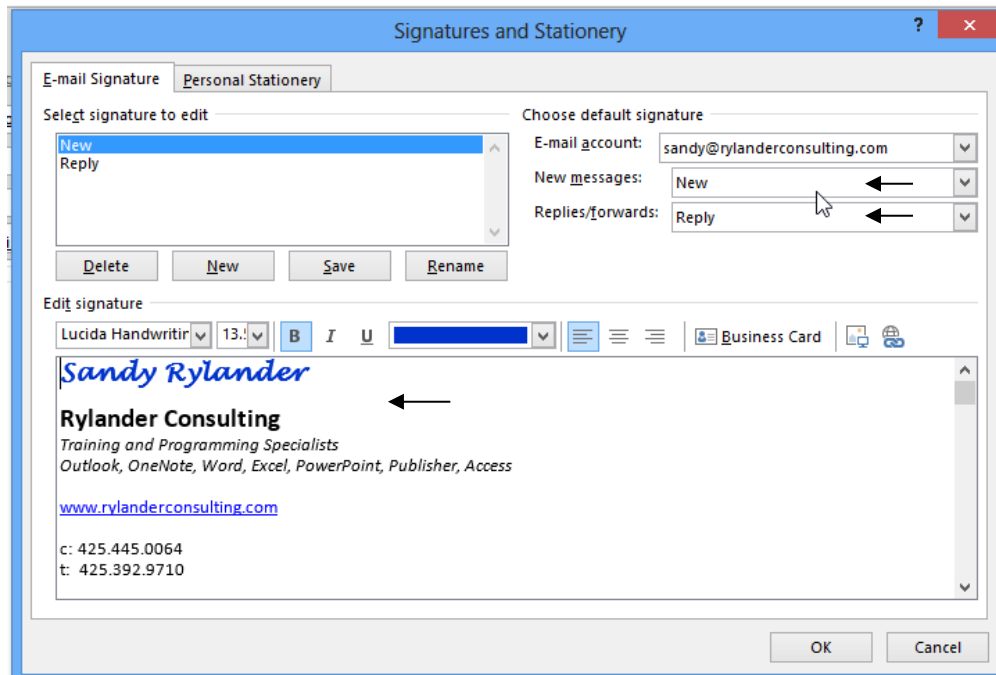
2. Select **New**.



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



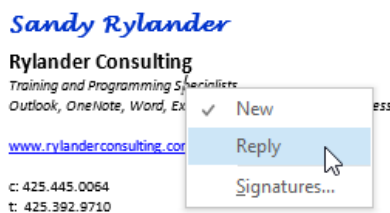
4. **Type your signature** as desired.  
*If you wish to use different fonts etc., highlight the desired text and use the Font buttons.*



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.

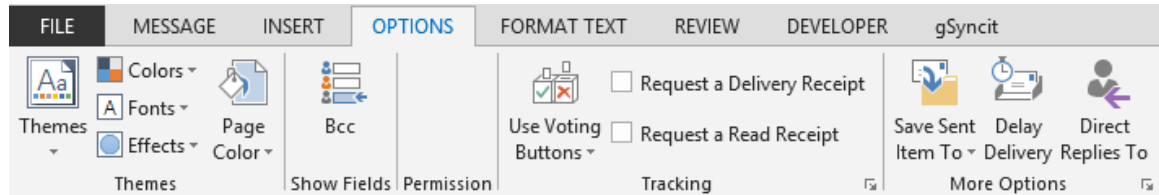
#### ■ Change Signature Block On-the-Fly

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.

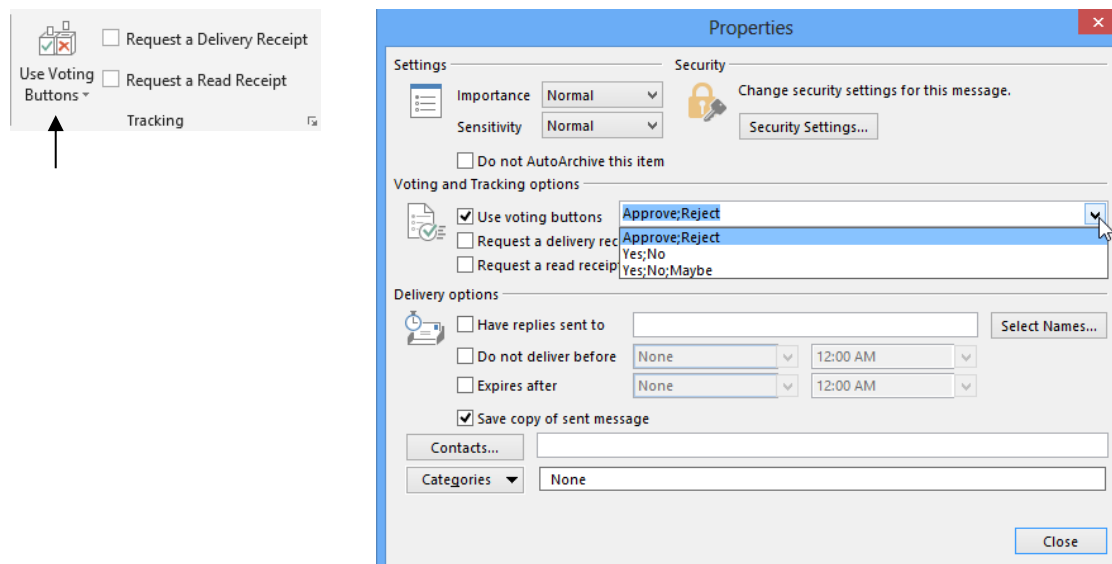


### ■ Add Options to an Email

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**.

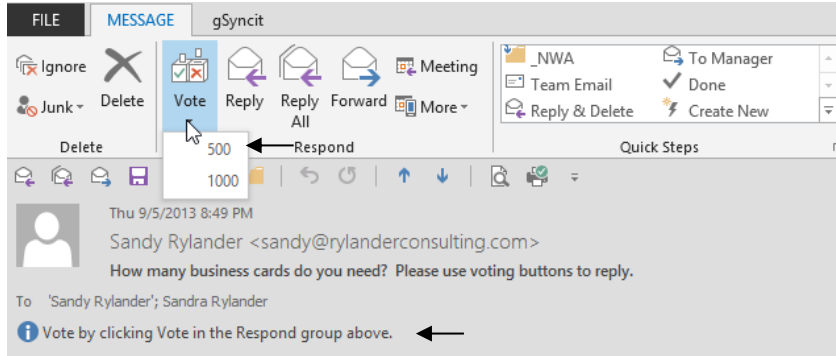
### Voting Buttons

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.

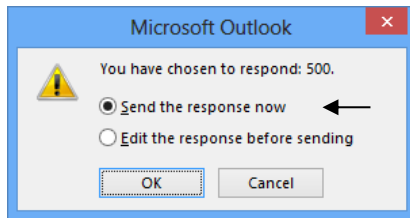


1. Select **Options, Use Voting Buttons, Custom** on the ribbon.

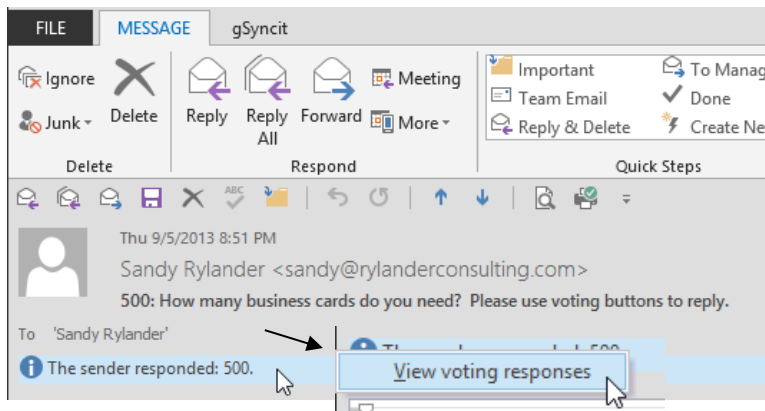
2. Select the text you wish to appear on the buttons from the Voting Options drop-down list. *If the desired text is not shown, type text desired for each button. Separate button text with semi-colons.*
3. The recipient will see this message:



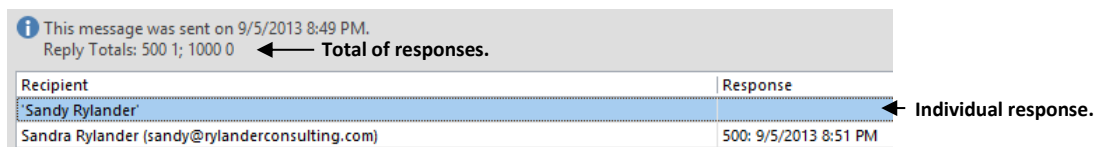
4. Recipients will click on one of the options and this message will appear. They will select one of the options and click OK.



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**



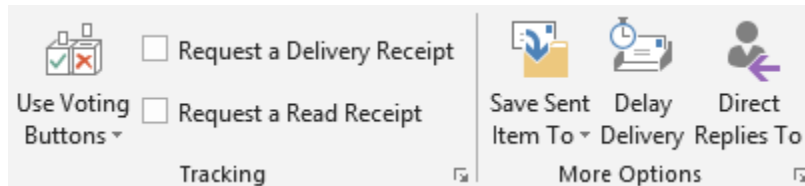
6. The following screen displays a count of all responses in the top grey bar and shows each individual's response.





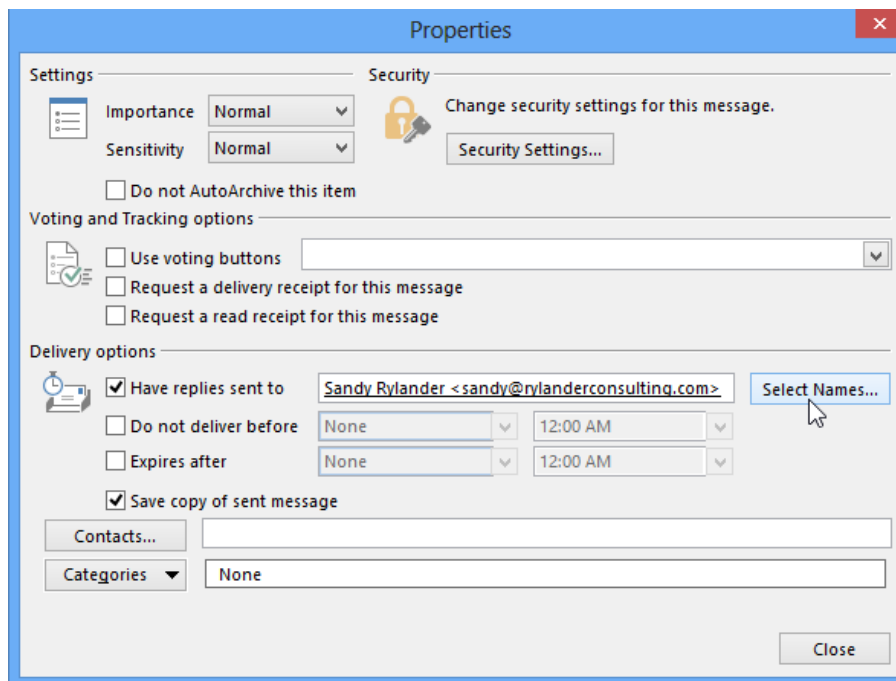
## Delivery and Read Receipt

A delivery receipt will send you when a message 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.



## 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.



## Delay Delivery

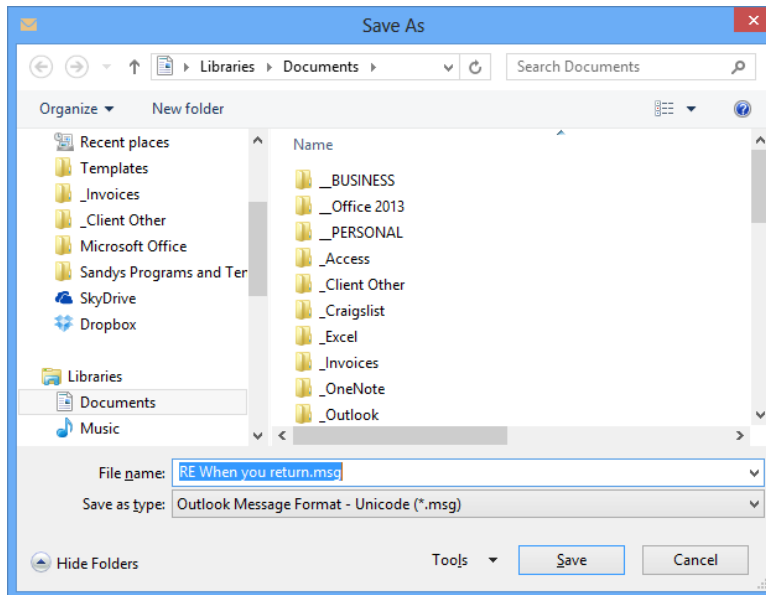
Send an email now, but do not deliver before a specific date. Use this option if you are going out-of-town and want to have time to compose and send the message now, but don't want the message received until a future date.

### 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.**



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.

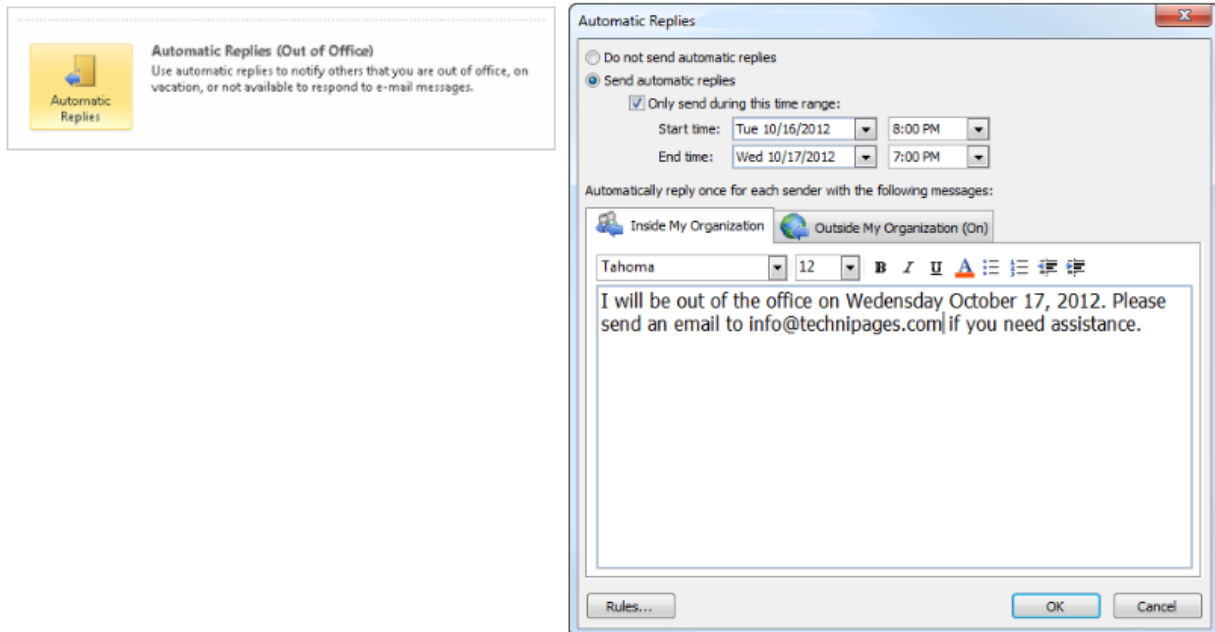
**Tip!** Saving a message as a .txt or .htm(l) file does NOT save the attachment. You can save attachments embedded in a message by saving a message as an .msg file. The disadvantage with using this technique is that you will not see the individual attachments when looking at a file list. You will have 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.



### Exercise:

- **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**.

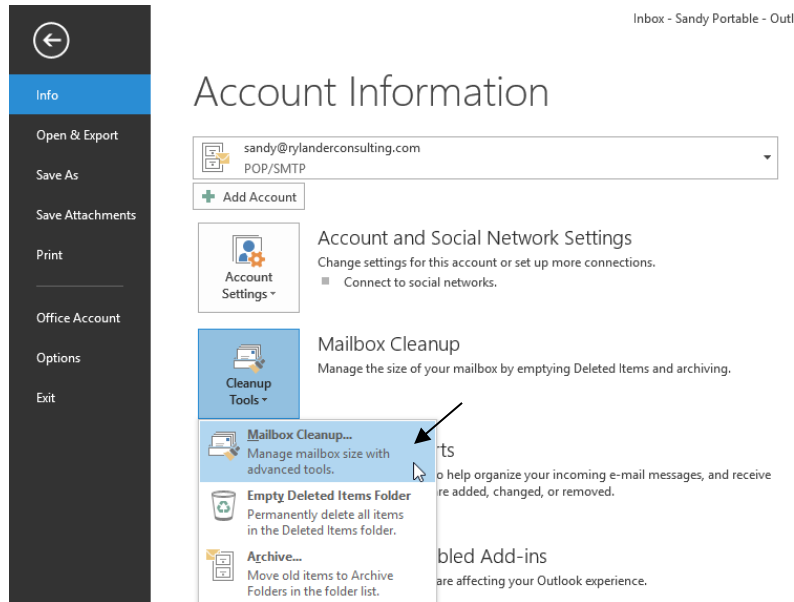
## Manage Mailbox Size

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.

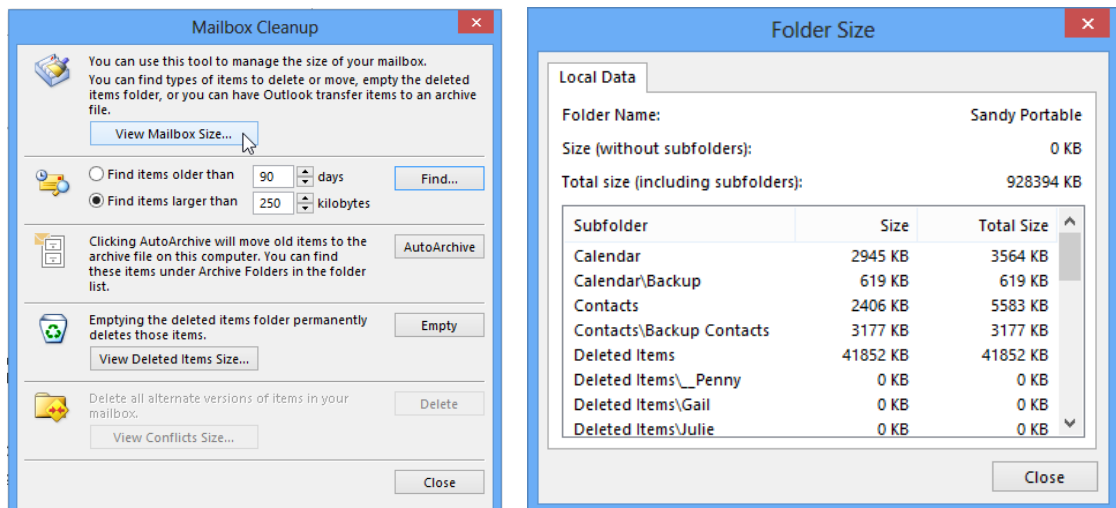
### Exercise:

#### ■ View your Mailbox Size

1. Select **File, Info, Cleanup Tools, Mailbox Cleanup**

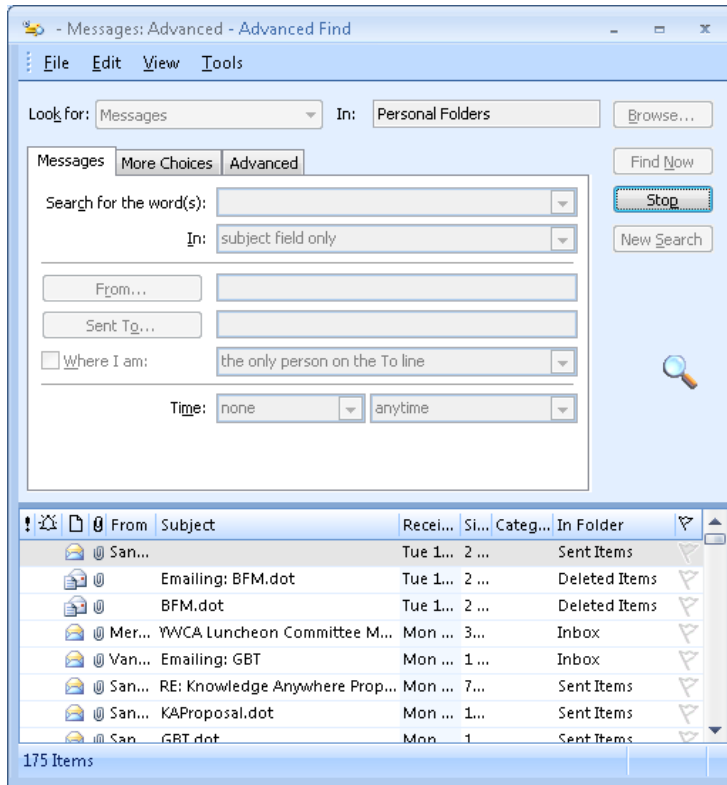


2. Click **View Mailbox Size**. Click **Close** when done.



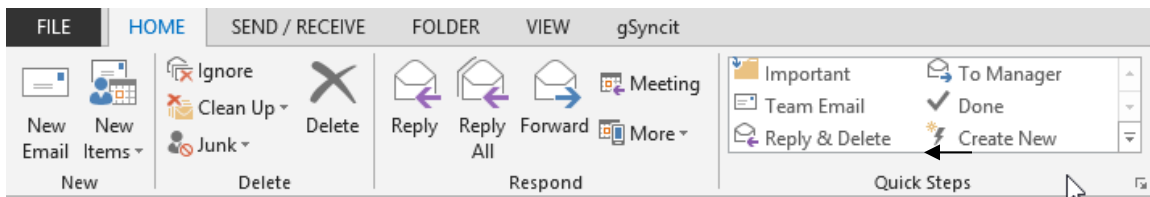
## Find Old/Large Items

1. Select the **Find items older than** or the **Find items larger than** option button. Fill in the days or size you wish 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.



## 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

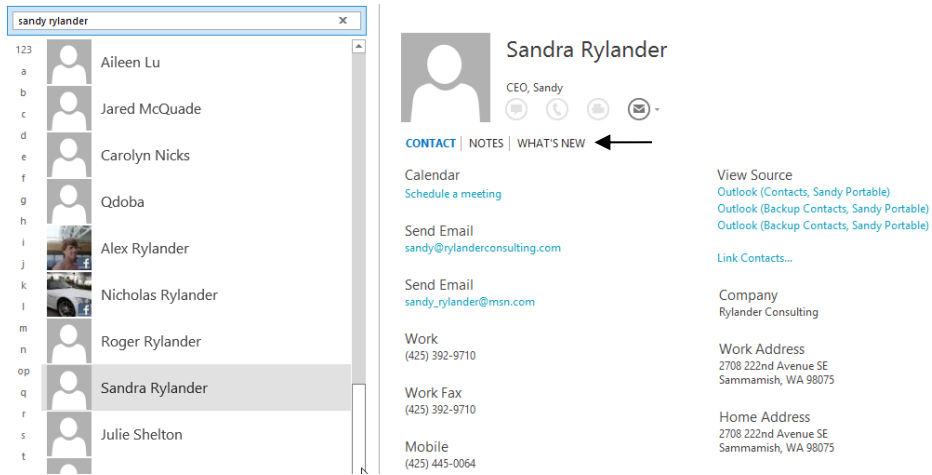
Outlook 2013 supports up to 3 Exchange accounts within an Outlook profile. The Ribbon in Outlook 2013 is specific to the account at which you are looking. If you click New Email in the ribbon while looking at the Inbox of your second Exchange account, your new message will be sent from your second Exchange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

## People - Contacts

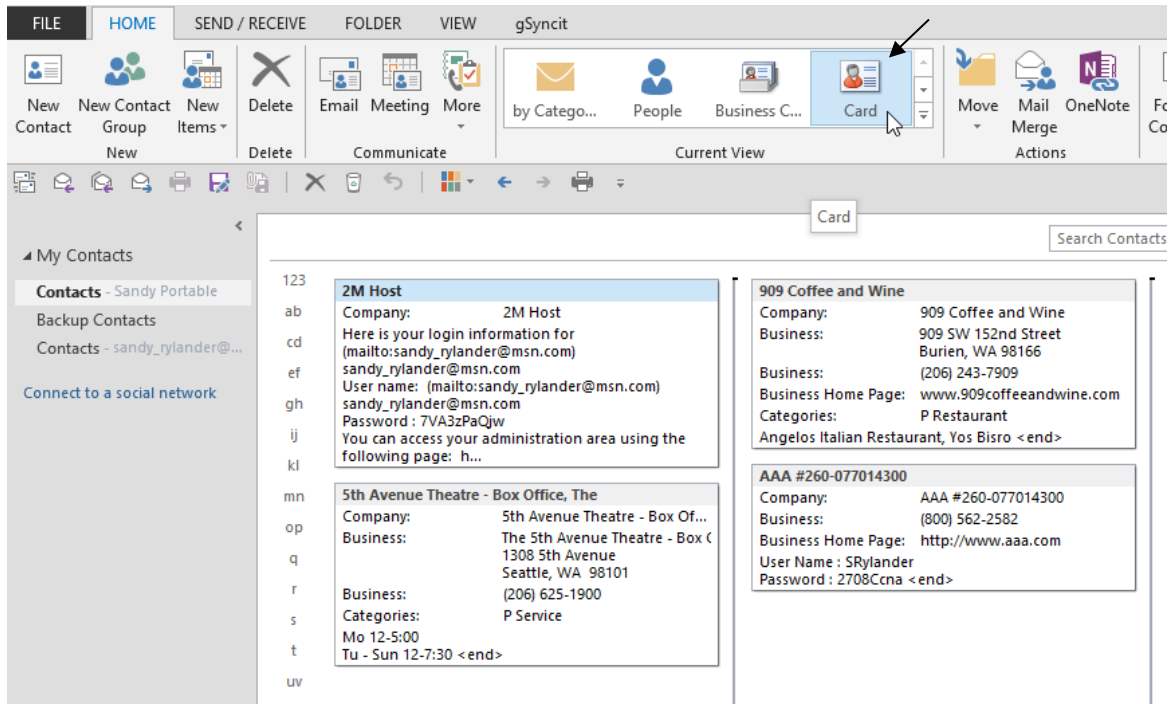
The People folder is where you store information about people with whom you communicate that are not already in the Global Address List (internal contacts). The notes area in the Contact form is great for tracking important conversations. The Categories box allows you to group contacts (i.e. clients,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

### Exercise:

#### ■ 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).*

The screenshot shows the Outlook interface with the 'New Contact' dialog box open. The 'Full Name...' field is highlighted with a blue border and a cursor. The dialog box contains the following fields and sections:

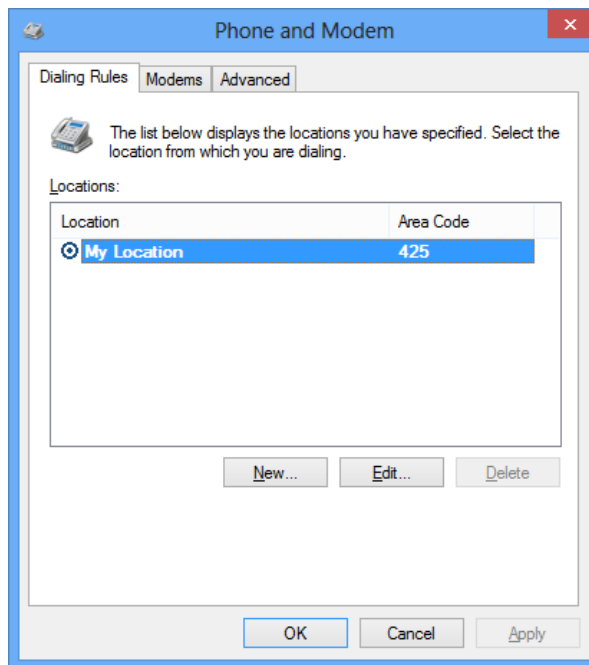
- Full Name...:** A text input field with a cursor.
- Company:** A text input field.
- Job title:** A text input field.
- File as:** A dropdown menu.
- Internet:** A section containing:
  - E-mail...:** A dropdown menu.
  - Display as:** A text input field.
  - Web page address:** A text input field.
  - IM address:** A text input field.
- Phone numbers:** A section containing:
  - Business...:** A dropdown menu and a text input field.
  - Home...:** A dropdown menu and a text input field.
  - Business Fax...:** A dropdown menu and a text input field.
  - Mobile...:** A dropdown menu and a text input field.
- Notes:** A text area on the right side of the dialog.

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:

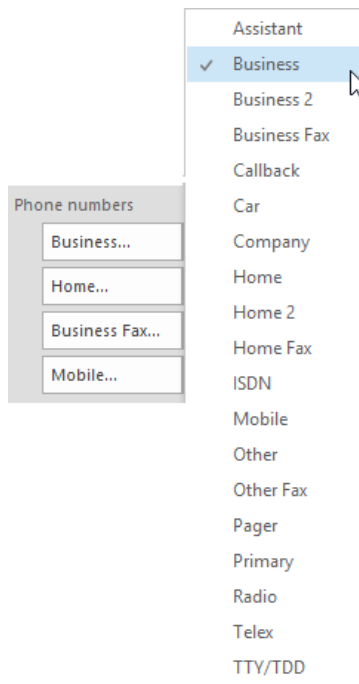
1. Select **Start** on the Task bar.
2. Select **Control Panel**.
3. Double click **Phone and Modem Options**, then select **Edit**.



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

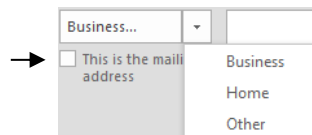


To type or view phone numbers other than the four displayed, click the drop-down arrow to the right of the phone number. Notice there are 19 phone number fields for your use. Also notice that phone numbers that have been entered have a checkmark by them.



A checkmark shows a phone number has been entered for that field.

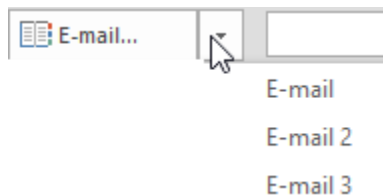
9. Enter up to **3 addresses**. First selecting the address you wish to enter from the address drop-down list, and then typing the address. If you enter more than one address, be sure to check which address you wish to be the mailing address.



Select the mail address to be used as 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 drop-down 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.

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.

The screenshot shows the 'CONTACT' ribbon tab with the 'Details' group expanded. The 'Details' group contains the following fields:

- Full Name...: Steve Abramavage
- Company: Terminators
- Job title: Pest Control
- File as: Abramavage, Steve
- Internet: E-mail... (dropdown)
- Display as: (empty)
- Web page address: (empty)
- IM address: (empty)
- Phone numbers: Business...: (425) 823-8351
- Home...: (empty)
- Business Fax...: (empty)

The 'Notes' area on the right contains the following text:

Jeannine refer  
Craig did pest control

Notes area.

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

The screenshot shows the 'DETAILS' ribbon tab selected. The 'Details' group contains the following fields:

- Department: (empty)
- Office: (empty)
- Profession: (empty)
- Nickname: (empty)
- Title: (empty)
- Suffix: (empty)
- Manager's name: (empty)
- Assistant's name: (empty)
- Spouse/Partner: (empty)
- Birthday: None
- Anniversary: None

The 'Internet Free-Busy' section contains the following fields:

- Address: (empty)

14. Click **Save and Close**.  
*The new Contact has been created.*

## Find a Contact

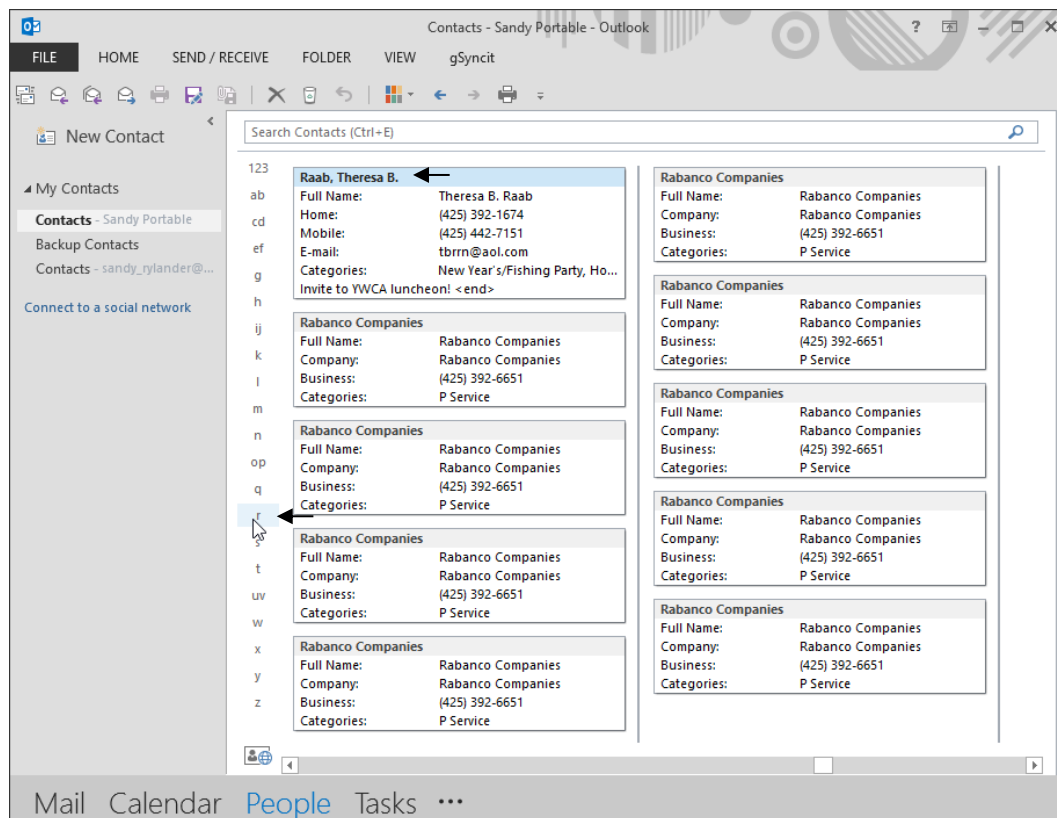
There are two ways in **Address Cards View** to find a contact **using the File As field** (usually the person's last name): 1) use the **Alphabetical Index** on the left side of the screen or 2) **click the name of a contact and start typing the last name** of the person you would like to find.

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

### Exercise:

#### 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.*



- Find a Contact by Clicking on a name and Typing the Last name

- Click a name and then start typing the last name of the person you wish to find.  
*Outlook goes to that name.*

Search Cont

123	<b>Rylander, Alex</b>	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: alexhvzr1@gmail.com Categories: Holiday Cards, P Family Sandy Call re Alex's Diversion # 070009364 BP 126/64 arm 133/49 leg WSU student Id 11255037 Alex's locker lock 8-30-16 <end>	<b>Rylander, Nicholas</b> Full Name: Nicholas Rylander Business: 2708 222nd Avenue SE Sammamish, WA 98075 Mobile: (425) 457-9240 E-mail: nickrylander@gmail.com Categories: Holiday Cards, P Family Sandy Eng 55: 9654823 Eng 57: 9654831 800 914 8931 HS code 480-500 Cody and Angelina (2) yes 466-1929 Devin Cunningham and Jessica (2) yes 766-1312 Pat Kelly 208-2878 Mike Peet 681-5254 Lauren Sullivan - no 894-6197 Layne Miyazaki - no...
r	<b>Rylander, Eric &amp; Suzanne</b>	Full Name: Eric & Suzanne Rylander Business: 1203 Windsor Drive Wilmington, NC 28403 Business: (404) 676-7210 Home: (404) 874-6275 Mobile: (910) 232-2302 Categories: P Family Roger, Holiday Cards	<b>Rylander, Nick &amp; Robin</b> Full Name: Nick & Robin Rylander Home: 3722 East 103rd Street Tulsa, OK 74137 Home: (918) 296-3560 E-mail: landerfield@cox.net E-mail 2: nrylander@eastcoastenterta... Categories: P Family Roger, Holiday Cards Eric Rylander (404) 815-4653 Landerfield 3722 East 103rd Street Tulsa, OK 74137 Feb 13 Bday <end>

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

- Start typing "Rylander" name in the search box.

ryla

123	<b>Ballard, Andrea</b>	Full Name: Andrea Ballard Job Title: Owner Company: Expecting Change LLC Mobile: (206) 794-3958 E-mail: andrea@topnetwork.com Business Home Page: http://www.google.com/pro... ----- From: Andrea Ballard <andrea@topnetwork.com> Sent: Monday, March 19, 2012 9:55 AM To: 'Sandy Rylander' Subject: RE: Join my network on LinkedIn Hi Sandy, It's so good to hear from you! I was happy to refer you to WKG and hope you ...	<b>Basuel, Jean</b> Full Name: Jean Basuel Company: Lorig Associates, L.L.C. Business: Market Place Tower 2025 First Avenue, #420 Seattle, WA 98121-2176 Business: (206) 727-2395 Home: (425) 357-6367 Business Fax: f(206) 728-5847 Categories: Holiday Cards, YWCA Lunche... Between Virginia and Lenora 1/24/02 8:22:21 AM - Sandy Rylander: called re programming and Office XP training. Parking entrance on Lenora <end>
-----	------------------------	--	---

- 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.*
- Click the "X" at the right of the search box to view all Contacts.
- 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.

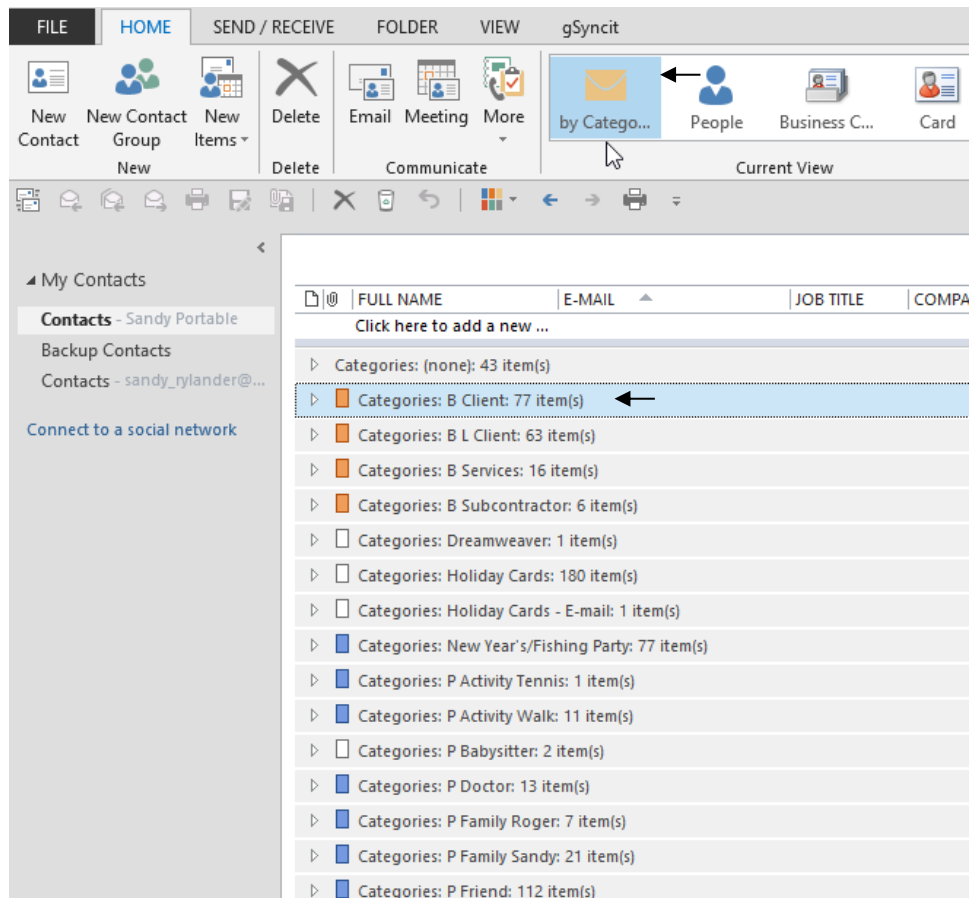
## Categories

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

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

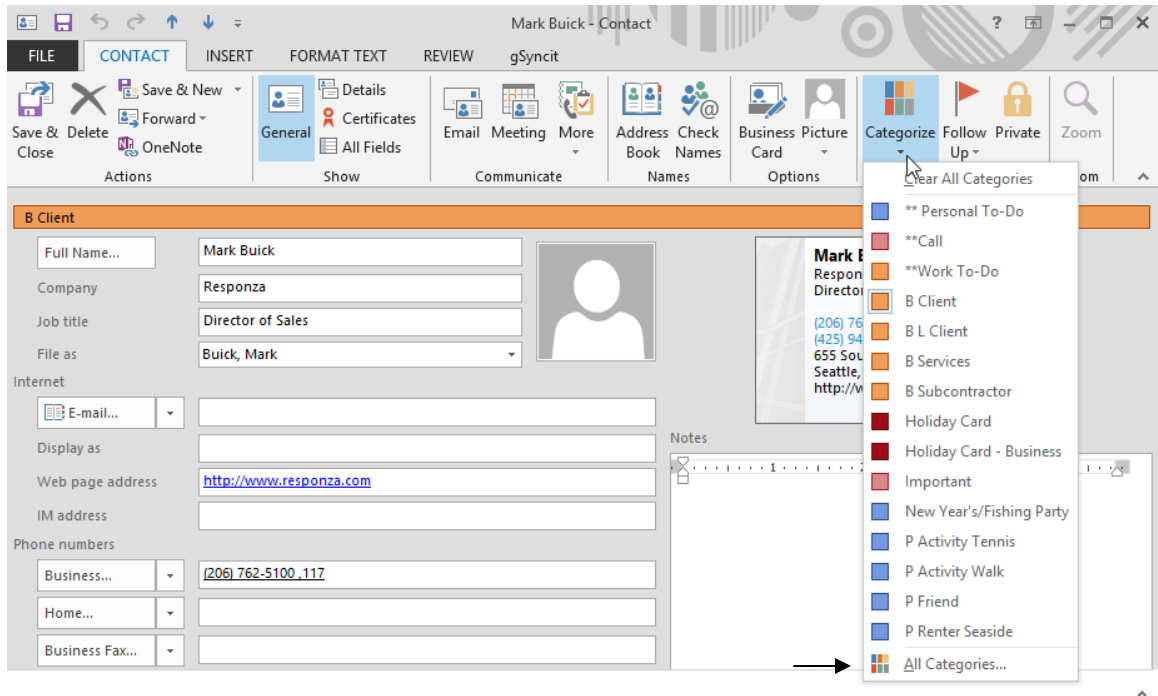


2. Click the arrow to expand or collapse the group.



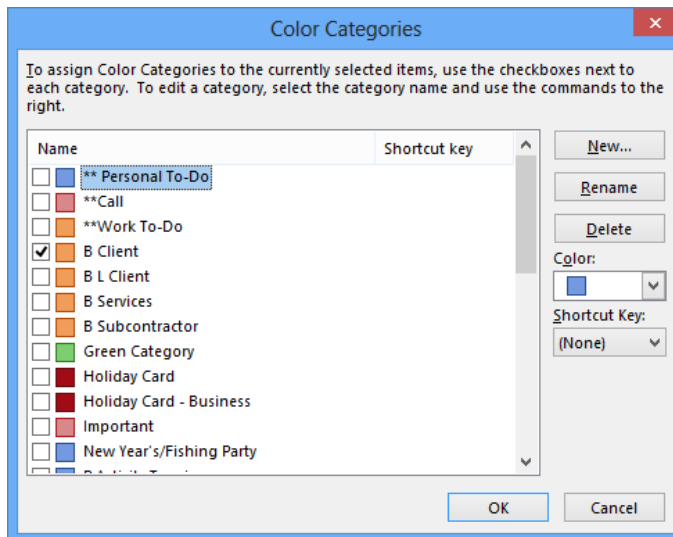
- **Add Categories to a Contact**

1. **Double click a Contact** to open the record.



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**.

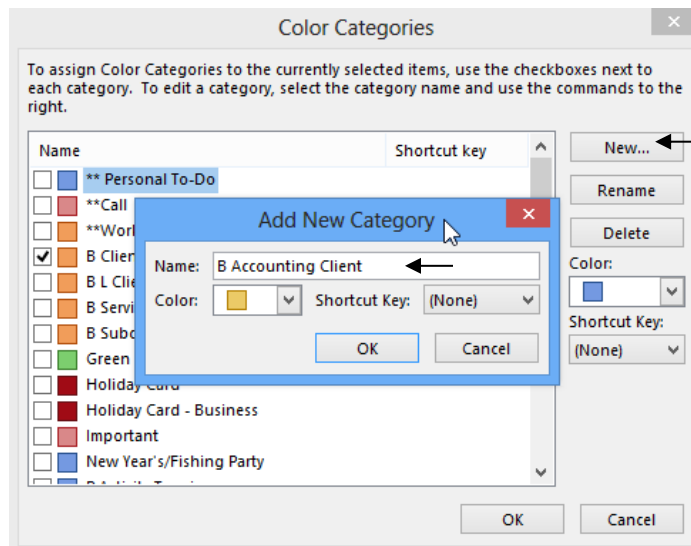


**Tip!** If the categories you need are not displayed, create your own, and/or delete existing ones.

### ■ 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 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).



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.

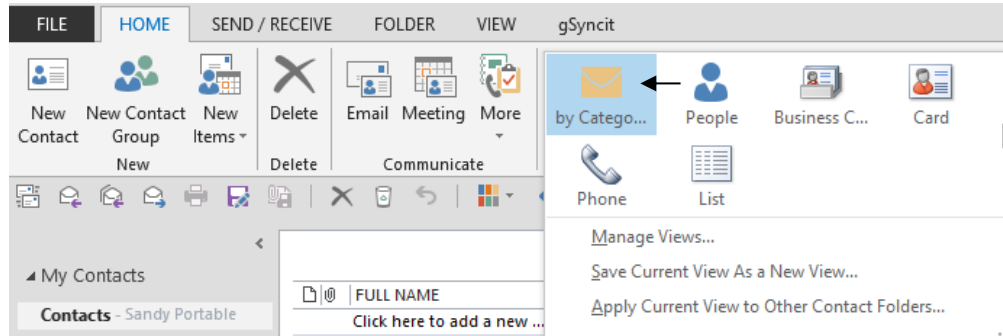
## Contact Views

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.

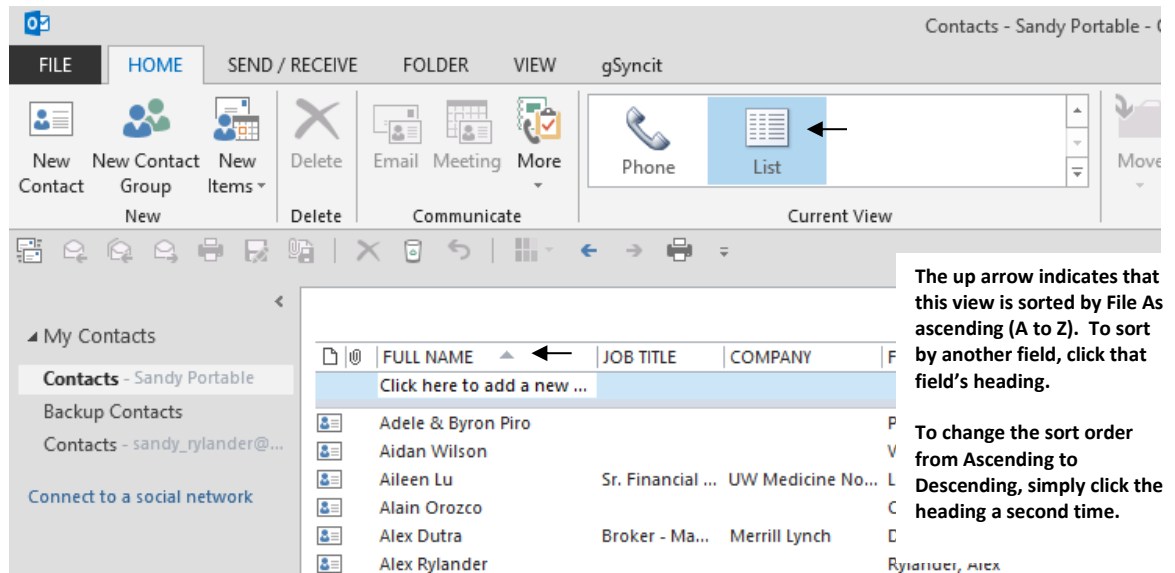
### Exercise:

#### 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.*





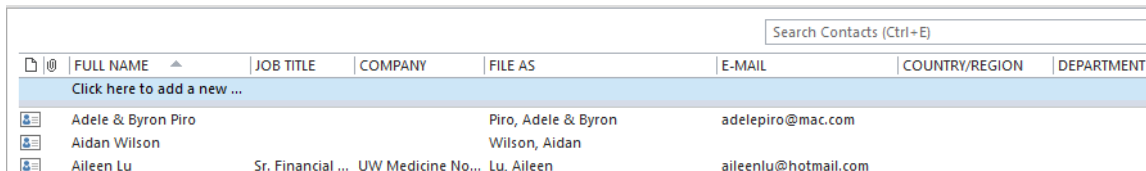
## Customizing Views

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

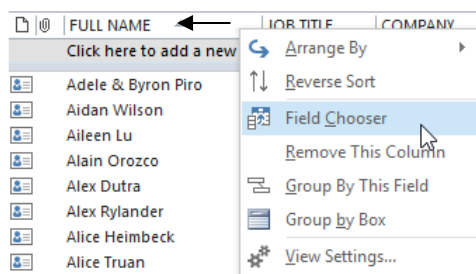
### Exercise:

- **Add Fields (for viewing or sorting) using Field Chooser.**

1. Select any Table View (i.e. **List View**)



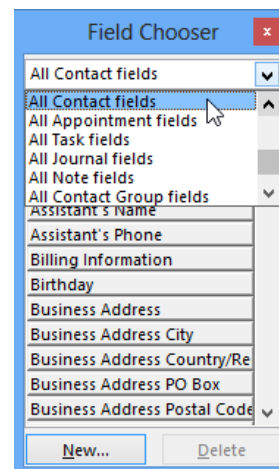
2. **Right click any column heading (i.e. Company) and select Field Chooser.**



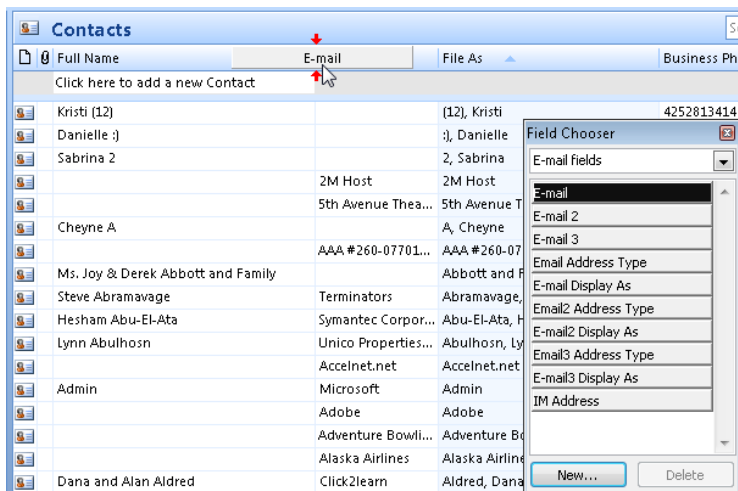
Right click column heading.

Select Field Chooser.

Select All Contact fields.



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

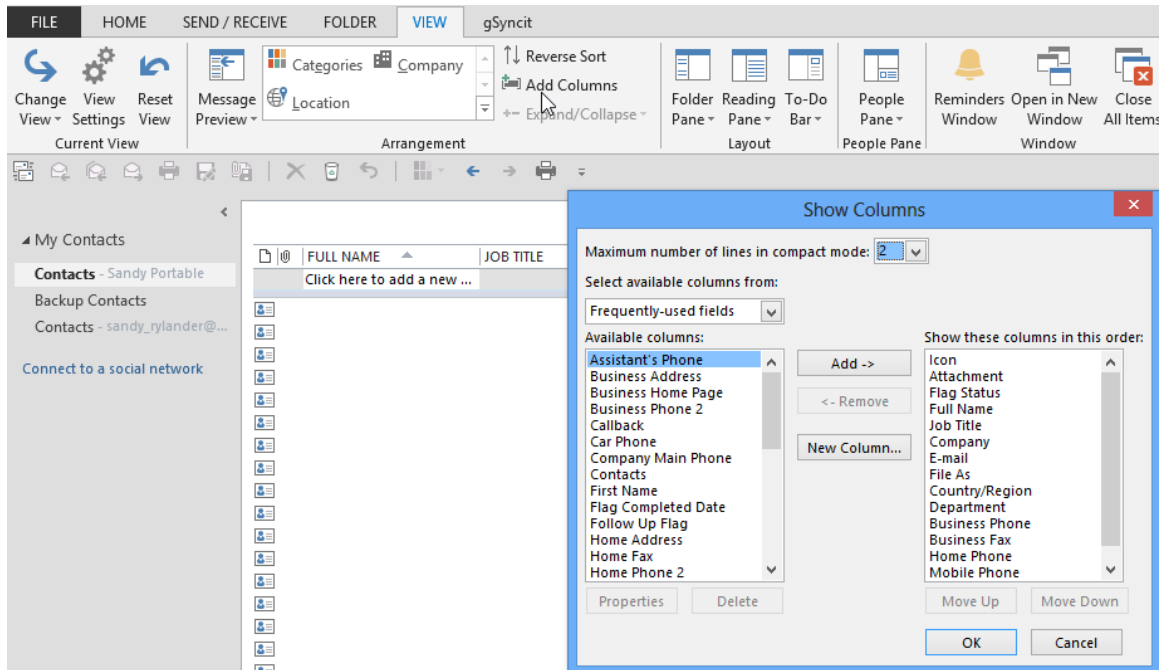


Click when done to close.

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.*

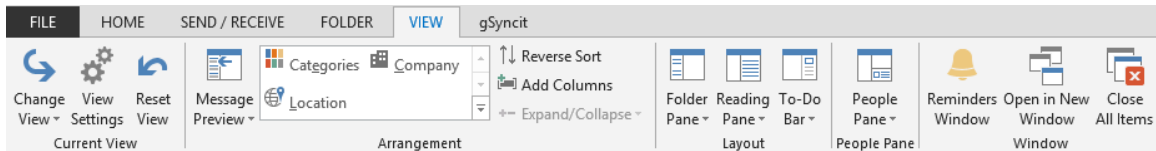
- **Add Fields (for viewing or sorting) using Add Columns on the View tab.**

1. Select **Add Columns** on the **View** tab.



### View Tab

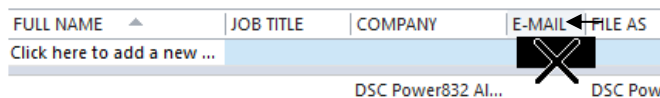
The View tab now makes it easy to customize views.



- **Remove Fields from View**

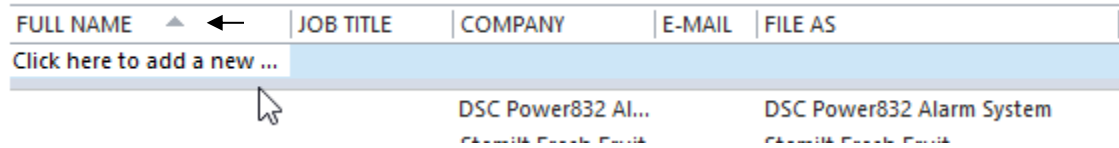
*Removing a field from view does NOT delete the field. It can be added at any time.*

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



## 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.*

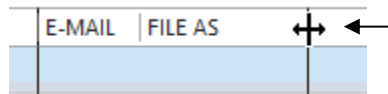


A screenshot of the Outlook column headers. The headers are: FULL NAME (with an upward arrow and a left-pointing arrow), JOB TITLE, COMPANY, E-MAIL, and FILE AS. Below the headers is a blue bar with the text "Click here to add a new ...". A mouse cursor is pointing at the "Click here to add a new ..." text. Below the blue bar, the first two columns of a table are visible: "DSC Power832 Al..." under "JOB TITLE" and "DSC Power832 Alarm System" under "FILE AS".

FULL NAME ▲ ←	JOB TITLE	COMPANY	E-MAIL	FILE AS
Click here to add a new ...				
	DSC Power832 Al...			DSC Power832 Alarm System

## Size Fields (Wider or Narrower)

1. 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.



## Print Contacts

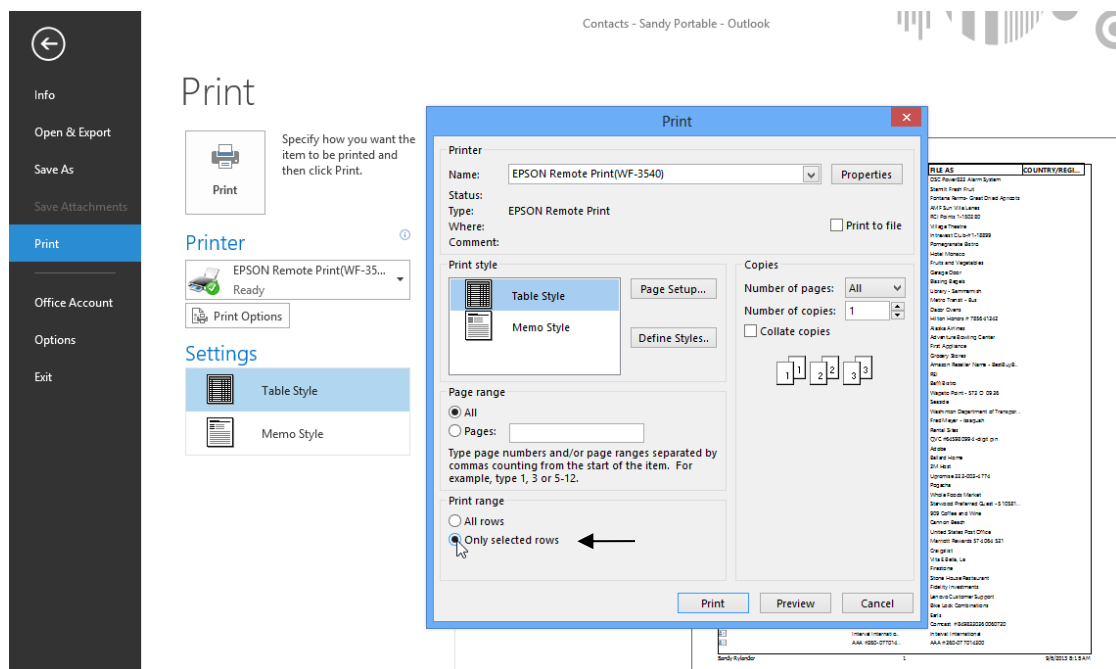
Contacts will print exactly as they appear on the screen.

- 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 print 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**.



3. Select **Only selected rows** and click **Print**.

# Calendar

## Calendar Views

### Day View with Tasks Go To Today

The screenshot shows the Outlook Calendar interface in Day View for September 7, 2013. The interface includes a ribbon with 'HOME', 'SEND / RECEIVE', 'FOLDER', and 'VIEW' tabs. The 'VIEW' tab is active, showing options for 'Day', 'Work Week', 'Week', 'Month', and 'Schedule View'. The main calendar area displays a vertical timeline for Saturday, September 7, 2013, with a blue bar representing an 'All Day Event' for 'Alaska flight #742 8:30-4:10 pm 26CD to Atlanta I1WNJM'. Below the calendar is a 'Tasks Due' pane showing a list of tasks with their due dates and reminder times. Annotations include: 'Navigate to different dates' pointing to the calendar navigation arrows; 'Search' pointing to the search box; 'All Day Events' pointing to the flight event bar; and 'Tasks Due' pointing to the task list.

### Week View with Tasks

The screenshot shows the Outlook Calendar interface in Week View for August 18 - 24, 2013. The interface displays a grid of events across the days of the week. The 'Tasks Due' pane is visible at the bottom, showing a list of tasks with their due dates and reminder times. The events include birthdays (Hilde Betz, Carma Kemp's Bday, Ann Marie Khalifa's Bday, Jacqueline) and various classes (B:NWA - Excel Basic, B:NWA - Excel Intermediate, B:NWA - PowerPoint, B:NWA - Excel Advanced, B:NWA - Word Intermediate, B:Sandy visit). Annotations include: 'Navigate to different dates' pointing to the calendar navigation arrows; 'Search' pointing to the search box; 'All Day Events' pointing to the flight event bar; and 'Tasks Due' pointing to the task list.

Work Week View with Tasks

◀ ▶ Sep 2 - 6 Issaquah, WA ☁ Today 71° F / 58° F Search Calendar (Ctrl+E) 🔍

	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
	2	3	4	5	6
	← From Aug 30 Wapato Point Unit 443 Upper 1 bed, 1 bath 527530908				
	Alex Off		*Greg Johnson's Bda		
Pacific	Labor Day, United Stat.		Clean Heat Filters, va		
8 AM					
9					
10		Meet w/Thomas Capps			
11					
Tasks	Show tasks on: Due Date			Update Word Add... <input type="checkbox"/> ▶	NWA-Prepare Exce... <input type="checkbox"/> ▶

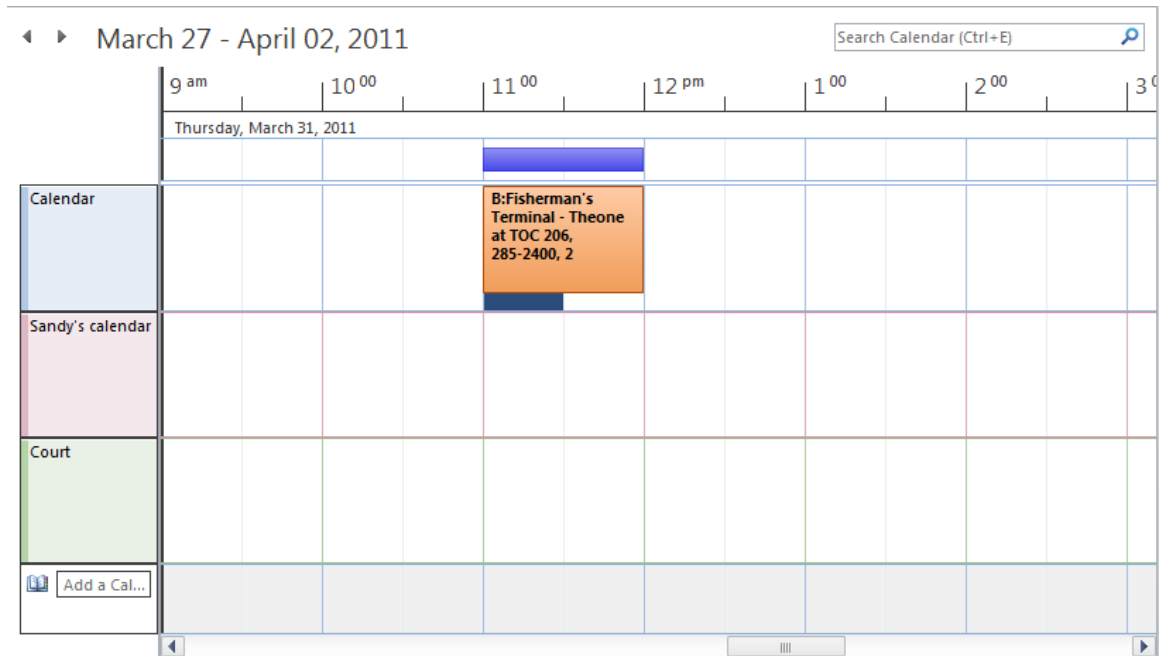
Month View - High Detail

◀ ▶ August 2013 Issaquah, WA Weather service is not available Search Calendar (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... 7:00am Chan...	8:05am B:N... 10:45am B:N...	8:05am B:N... 10:45am B:N...	8:05am B:N... 10:45am B:N...	Kevin & Peg... 8:05am B:N...	*Leah Villar's... 8:05am B:N...	Tom Kemp's ... 6:00pm Conc...
11	12	13	14	15	16	17
7:00am Chan... 10:30am js m...	*Shelley Ros... Audrey & Tin...	8:05am B:N... 10:45am B:N...	Audrey & Tin... 8:05am B:N...	*Kristi van Zu... Alex's Health...	8:05am B:N... 10:45am B:N...	12:00pm Nickerson Street Ale Ho...
18	19	20	21	22	23	24
Hilde Betz B... Jacqueline D...	8:05am B:N... 10:45am B:N...	*Carma Kem... 8:05am B:N...	8:05am B:N... 10:45am B:N...	Ann Marie K... 8:45am B:Sa...	2:00pm Dr. L... 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 Unit 443 Upper 1 I	Judy Vander...

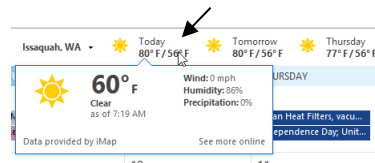
**Schedule View**

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



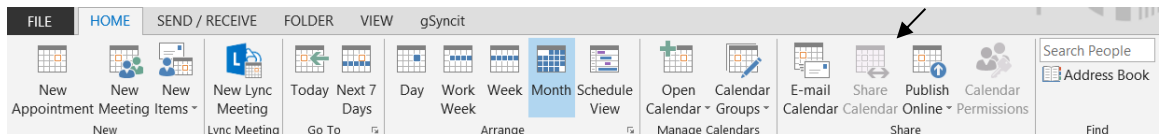
**Weather - New in 2013.**

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.



**Sharing - New in 2013.**

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

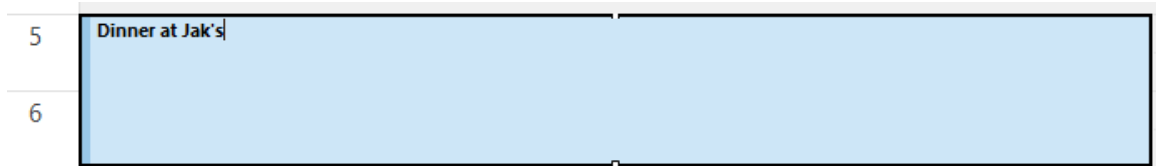


**Create an Appointment in Day View**

**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



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

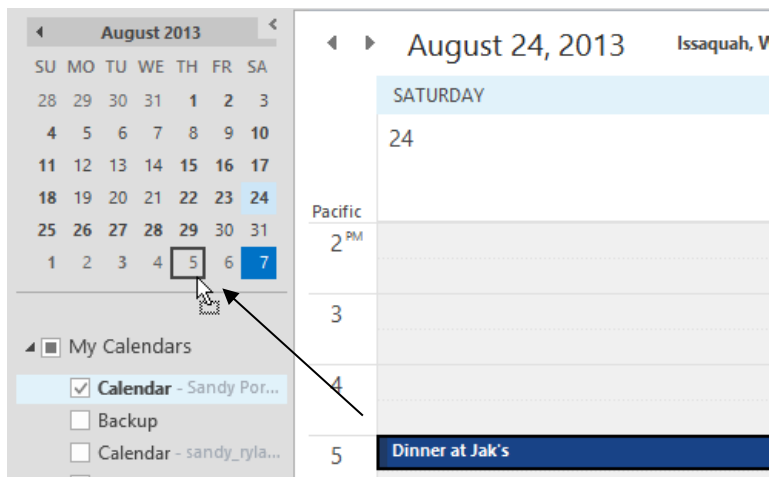


## Move/Copy an Appointment in Day View

### Exercise:

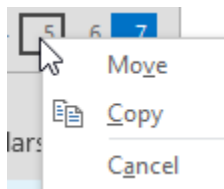
#### Move an Appointment

- Drag the appointment to a new time slot on the same date; or
- 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.*



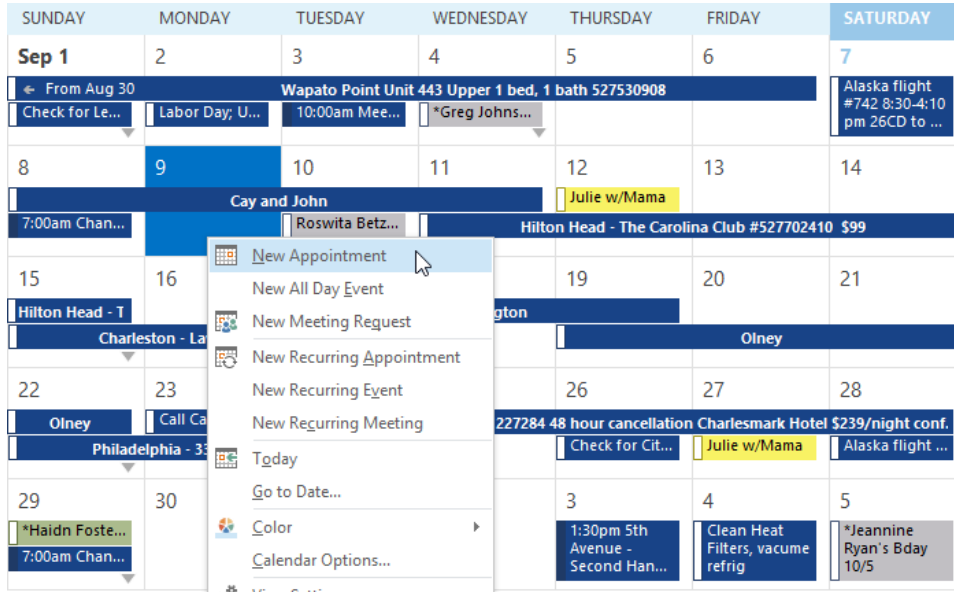


## Create an Appointment in Week or Month View

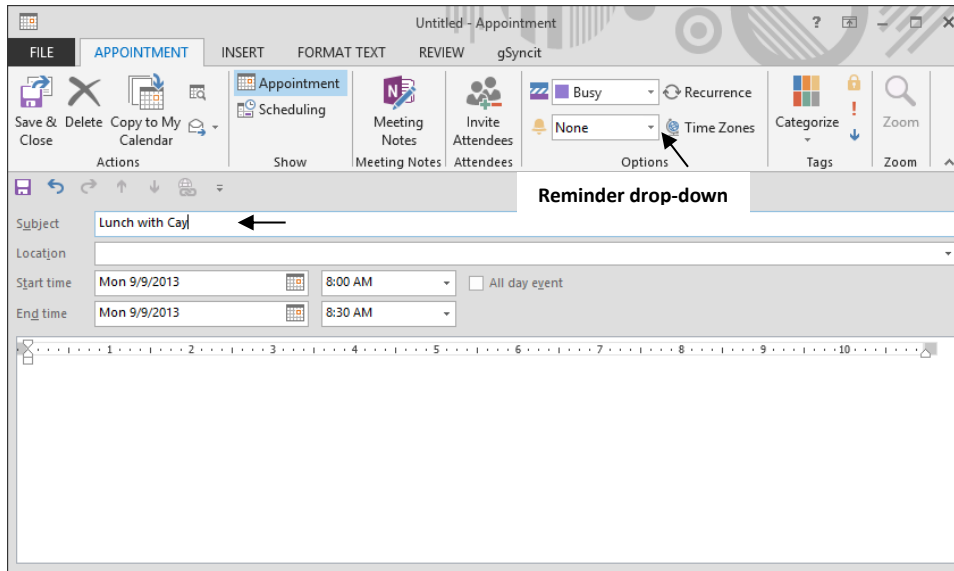
### Exercise:

- **Create an Appointment in Month View**

1. **Right click the desired date and select New Appointment.**



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



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

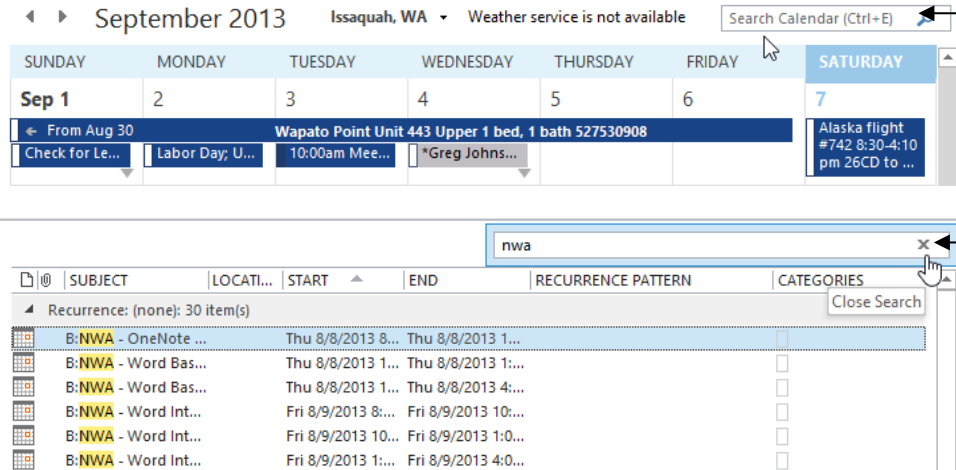


## Search for Appointments

### Exercise:

- Search for an Appointment

- Click in the **Search Calendar box**. Type the search text.



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

### See Hidden Appointments – due to lack of space

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



Additional appointments cannot be seen due to lack of space. Click the yellow arrow to go to day view and view all appointments.

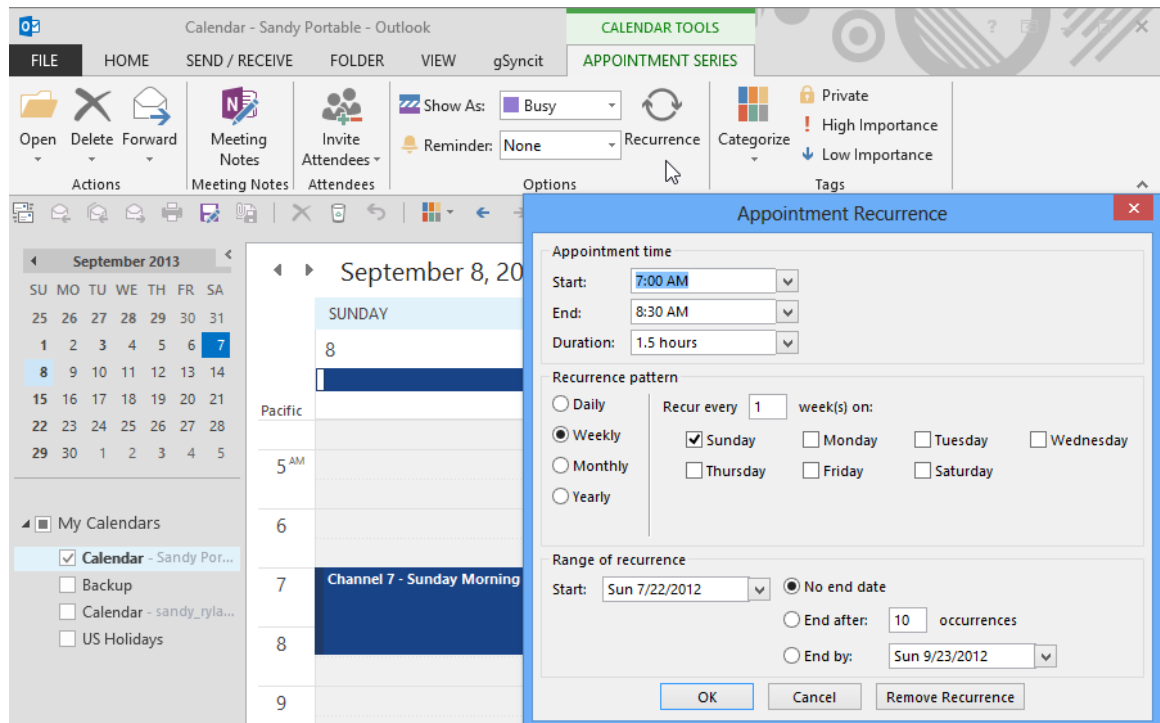
## Recurring Appointments

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.



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.

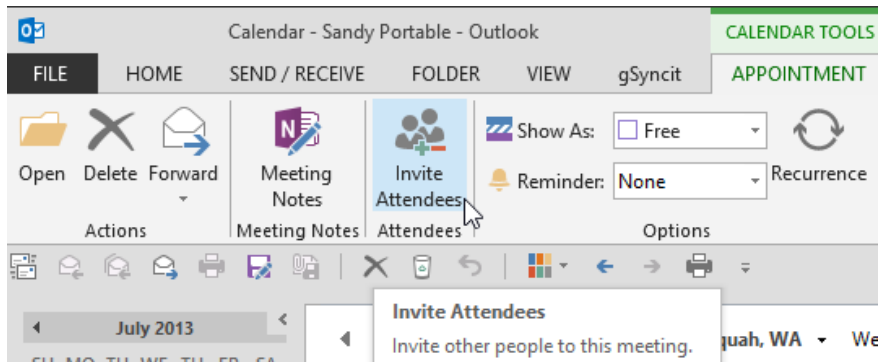
#### ■ Remove a Recurring Appointment

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

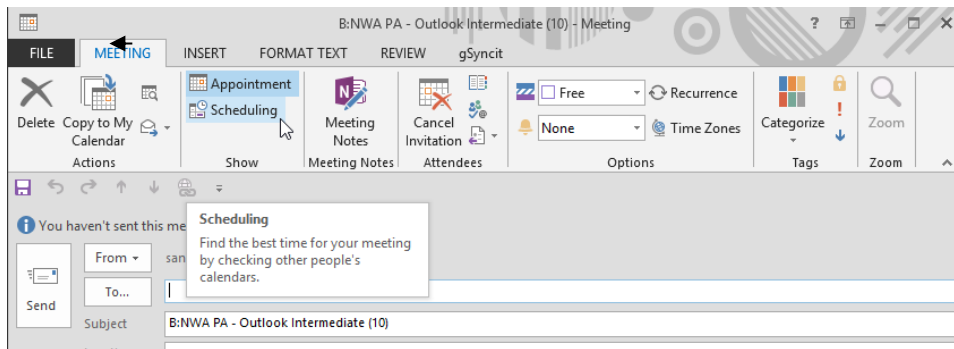
## Group Meetings

### Schedule a Group Meeting

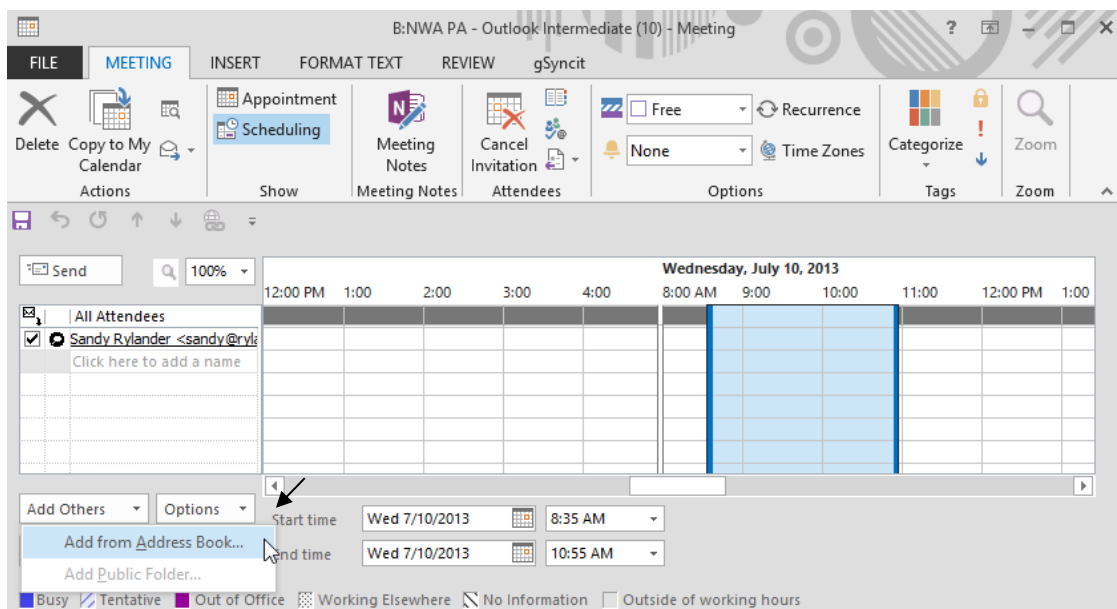
1. Click to select the appointment.
2. Click **Invite Attendees** on the **Appointment** tab.



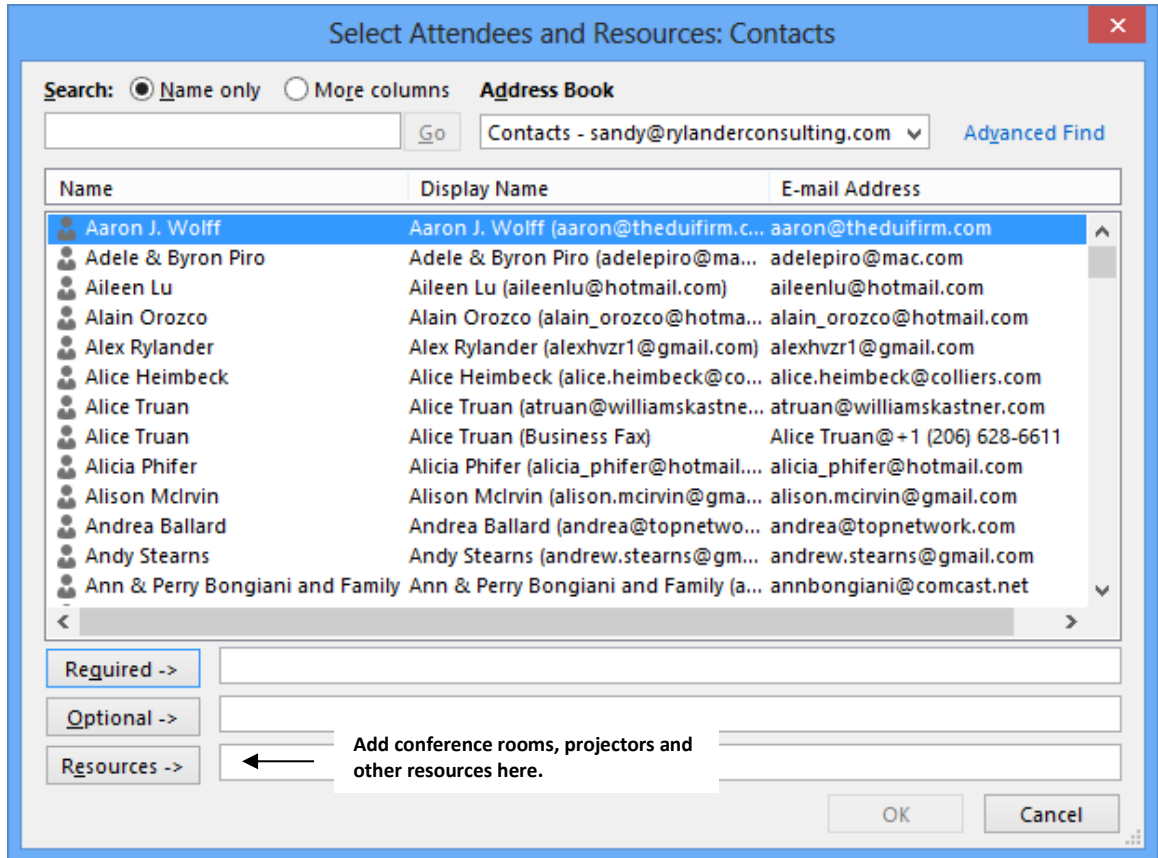
3. Click **Scheduling**.



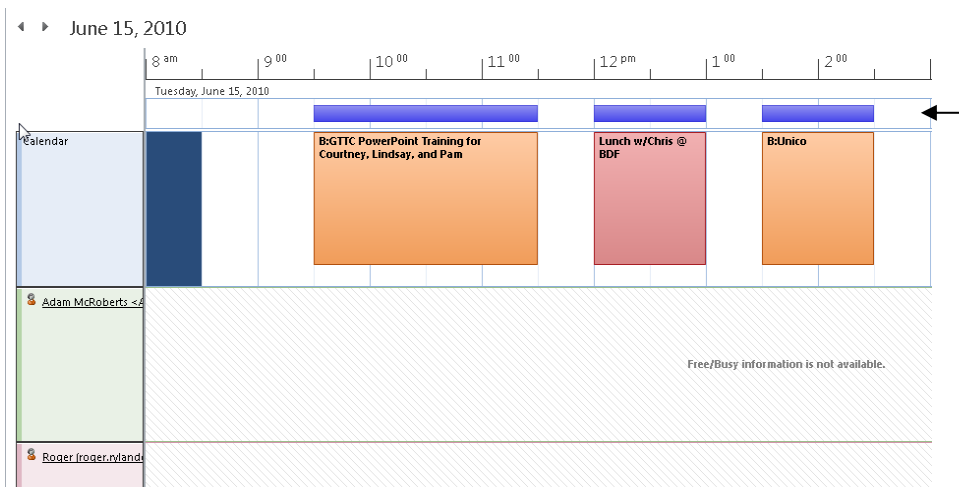
4. Select **Add Others** then select **Add from Address Book**.



- Double click everyone you wish to invite.  
*Their names will appear in the Required box.*
- 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.



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



- 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

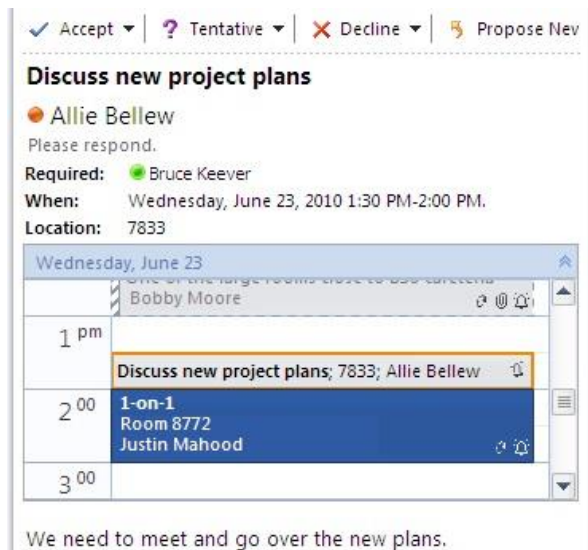
Scheduling a meeting is as easy as replying to the message. While reading a message, you can schedule a meeting with all the message recipients with the new **Meeting Reply** command. All the messages recipients are added to a new a meeting request in one click.

### 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.

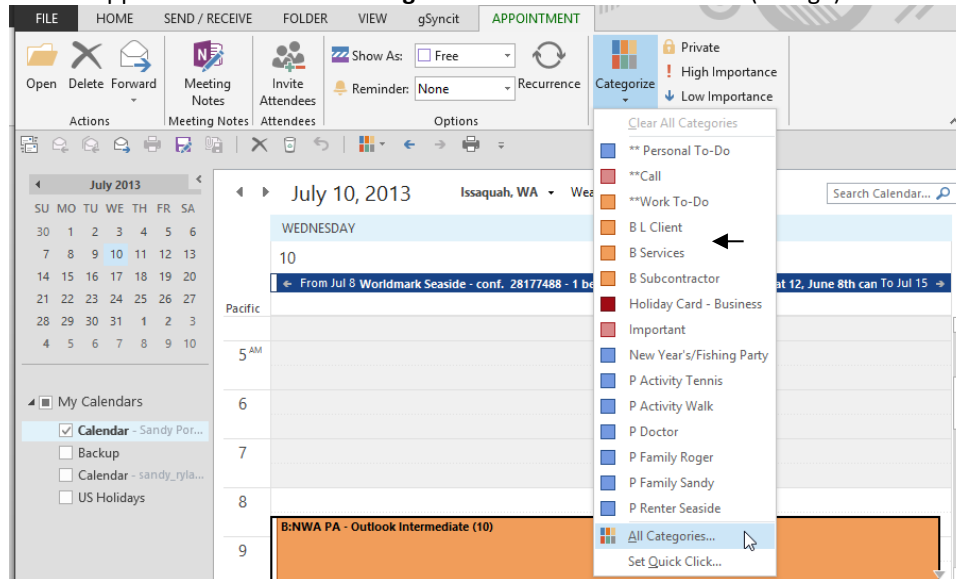


## Color/Categorize Appointments

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).

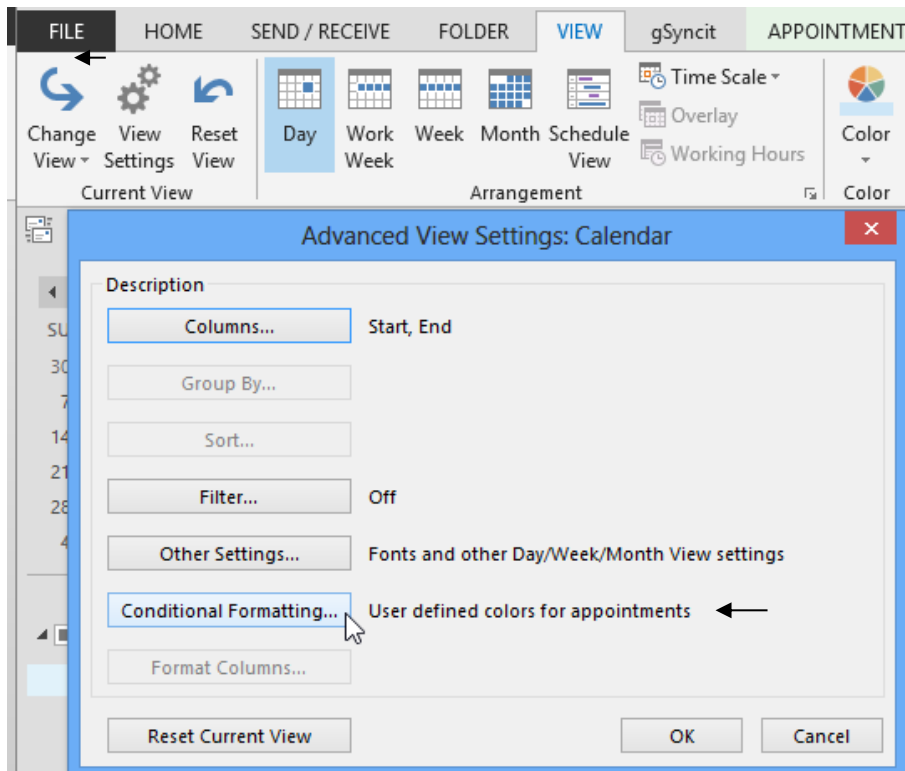
### Color code an Appointment – Assign a Category

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



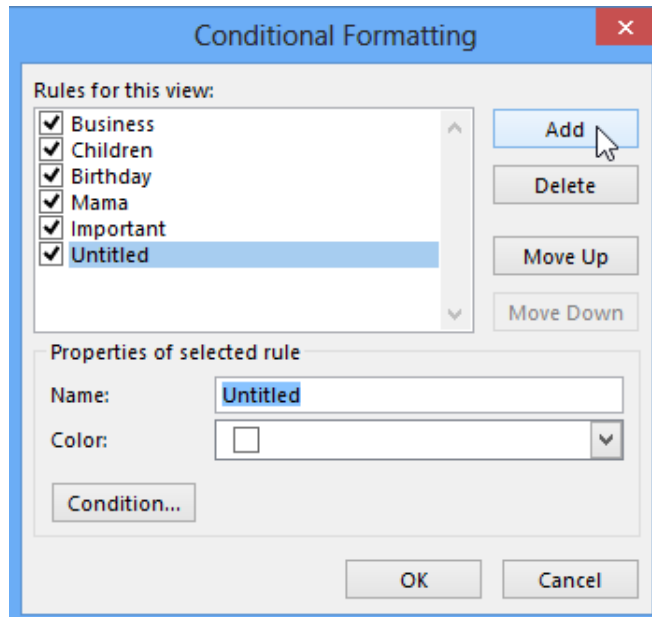
### Automatically Color Code an Appointment – Conditional Formatting

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

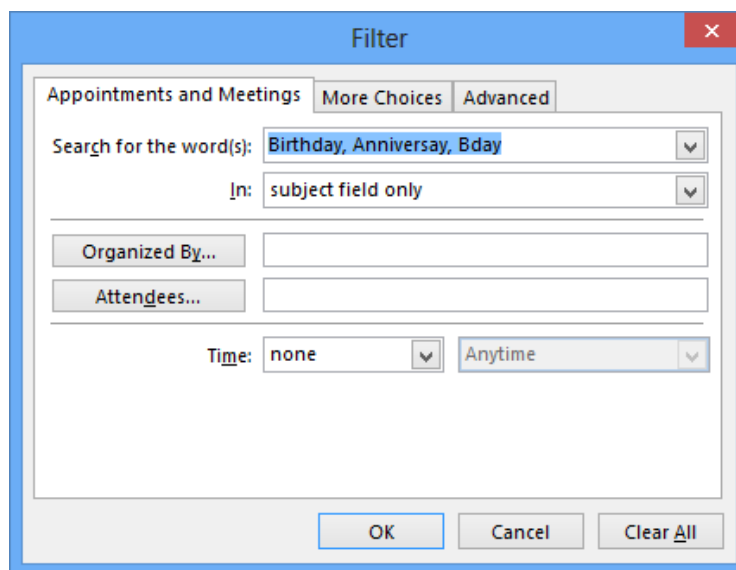




2. Click **Add**.



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.



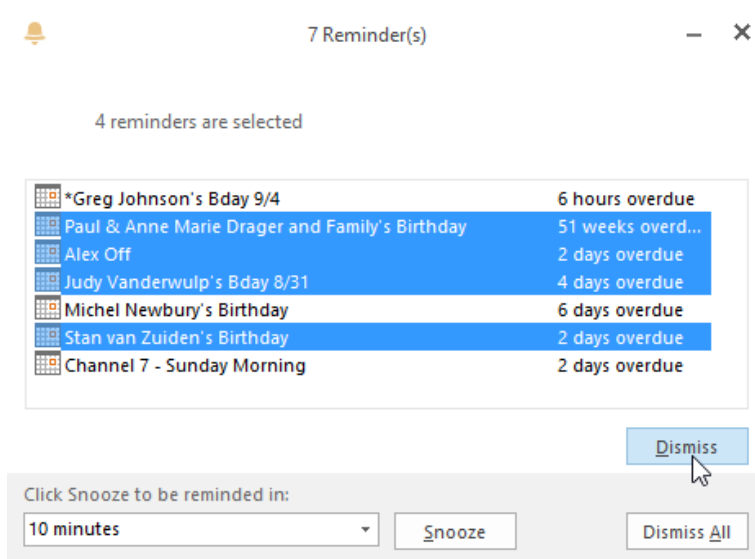
7. Click **OK twice**.
8. Test the Automatic formatting by **adding a Birthday appointment**. *When you click off of the appointment it should turn the color you selected.*

## 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.

### Exercise:

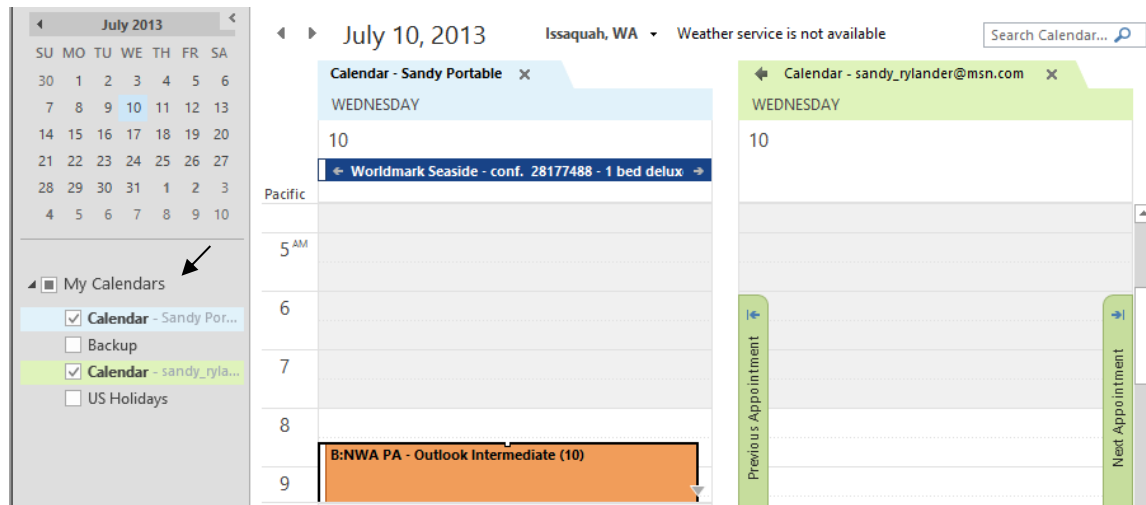
#### Dismiss two messages



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.



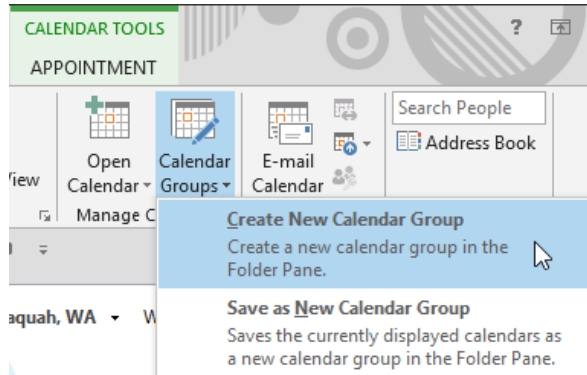
## Group Schedules

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).

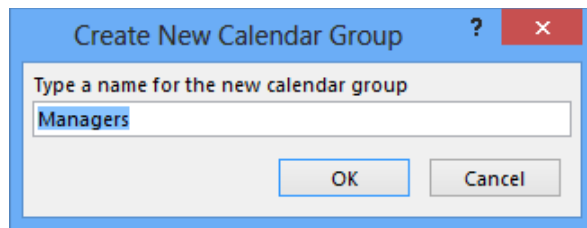
### Exercise:

- **Create a Group Calendar for Conference rooms**

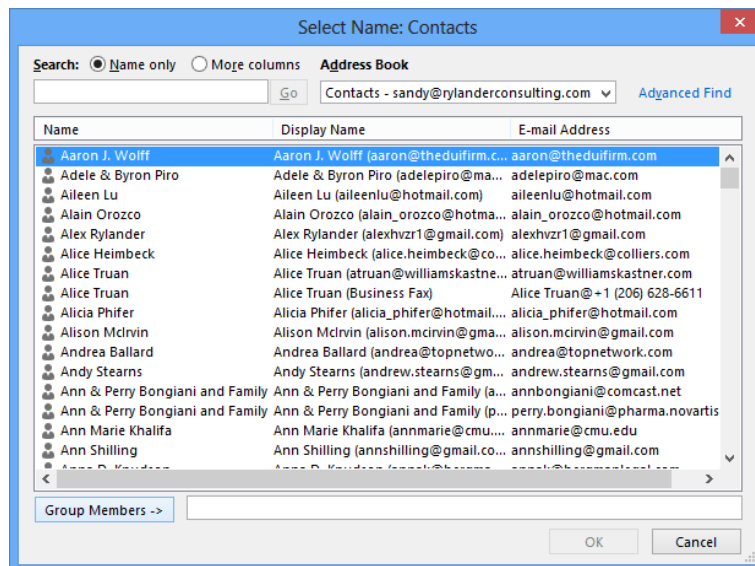
1. Select Calendar View and select **Calendar Groups, Create New Calendar Group** on the Home tab.



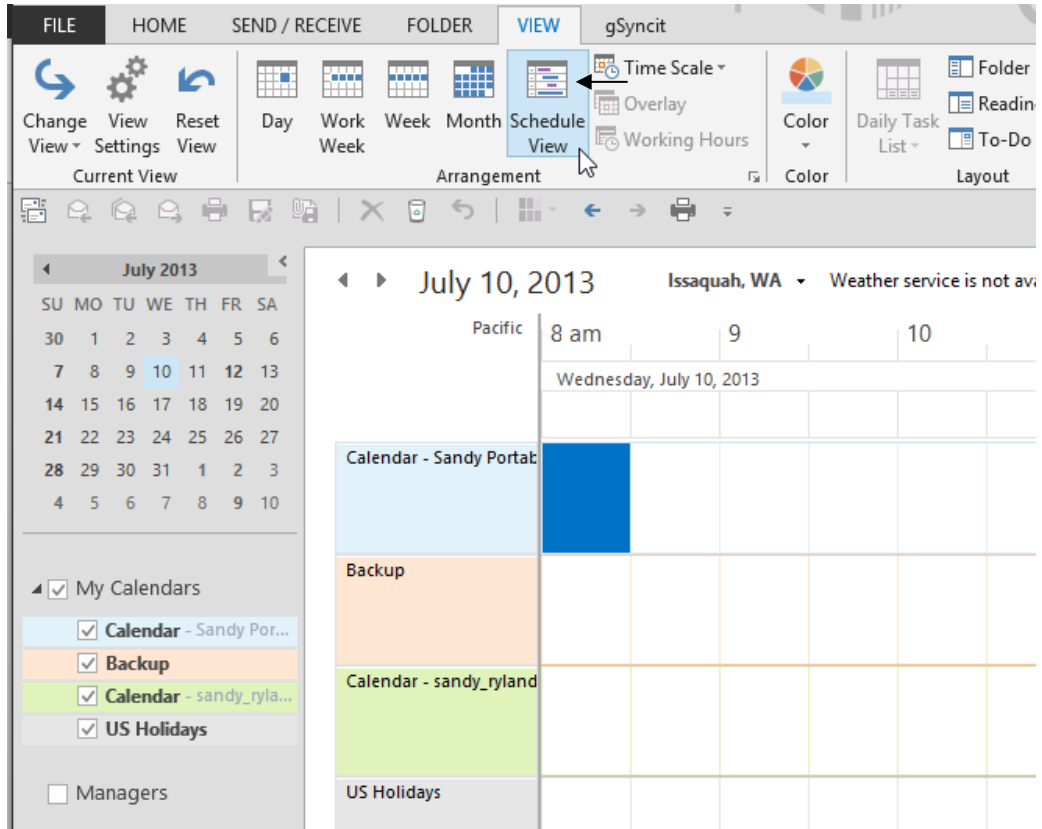
2. Type the name of the new group in the text box. Click **Ok**.



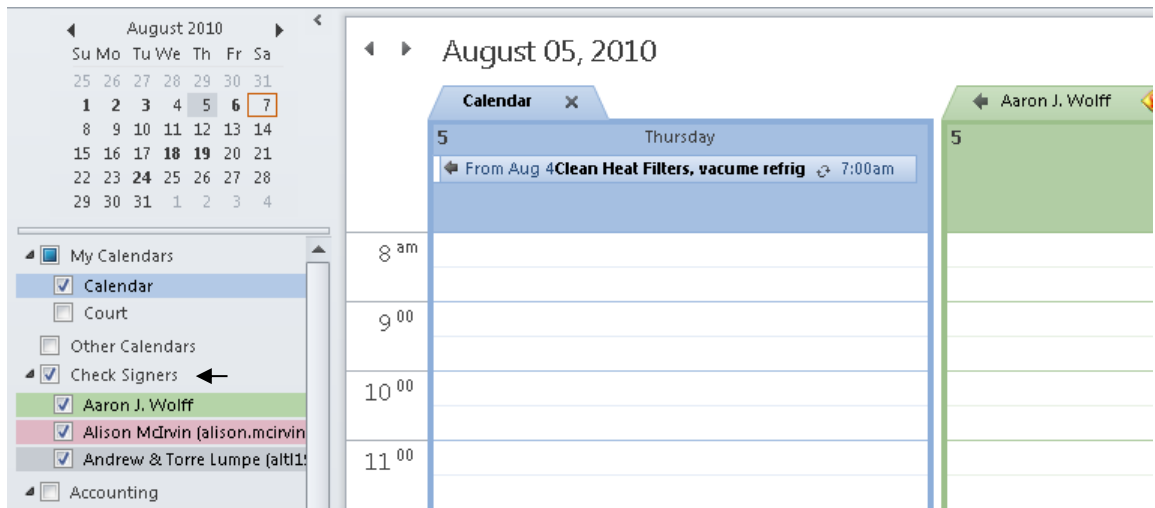
3. Select the names or public folders desired. Click **Ok**.  
*The number of names selected determines if calendars are displayed vertically or horizontally.*



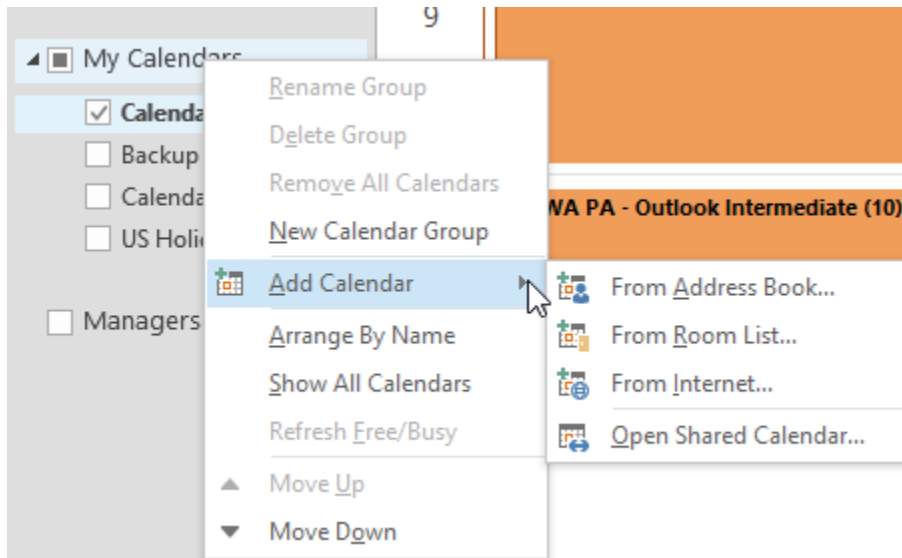
4. Selecting **View, Schedule View** will display them horizontally.  
*To display them vertically again, simply select Day, Week or Month view.*



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

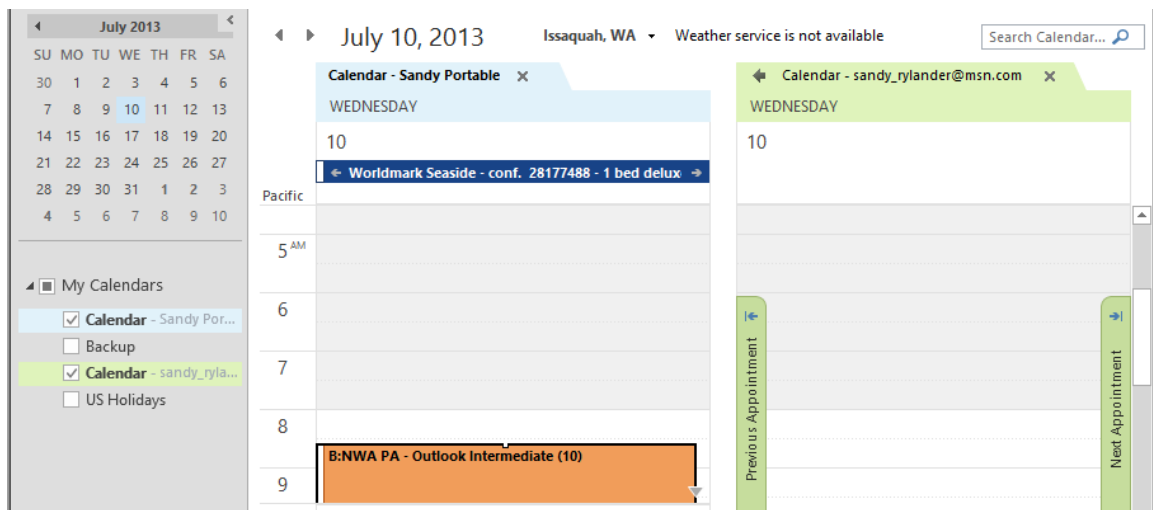


6. You can add new calendars to the group, delete the group, move it up or down on the list, etc. just by right-clicking the group name in the navigation pane.



## 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.



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

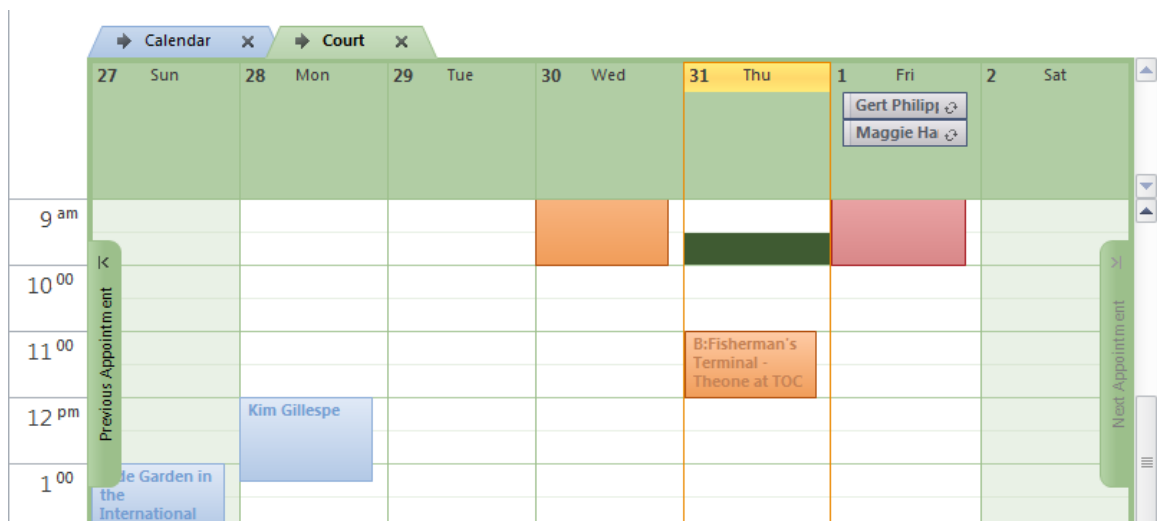
1. In **Calendar view**, in the **Navigation Pane**, select the check box of another calendar.  
*The calendar that you selected opens next to the calendar that is already displayed.*

**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 , click .

The calendars are now in overlay mode.



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  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

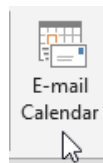
1. Select Calendar Month View. Click the **Print** tool  
*Views print as they are shown on screen.*

**Tip!** Check date range before printing!

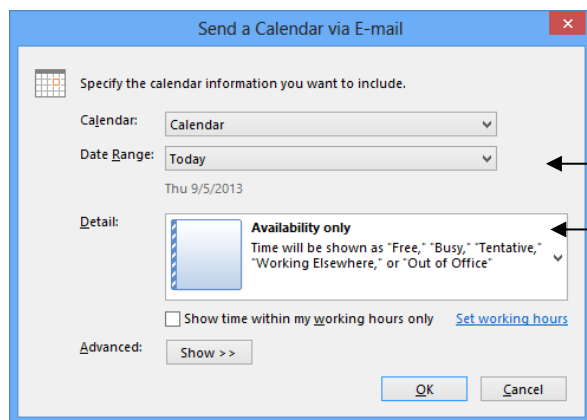
### Send Calendar Snapshots

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

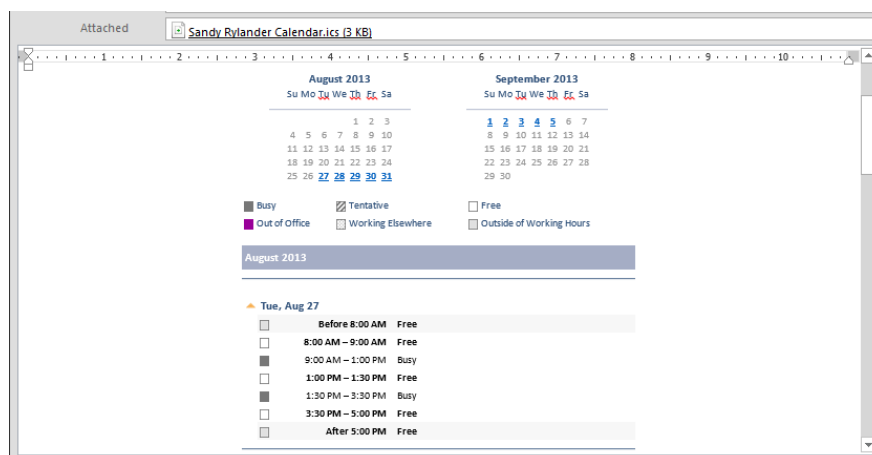
1. On the Calendar view Home tab, click **Email Calendar**.



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



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



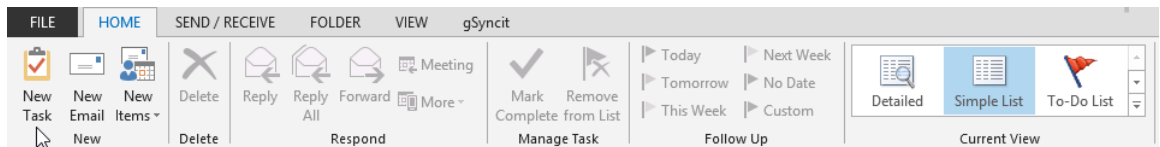
## Tasks

### 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.



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

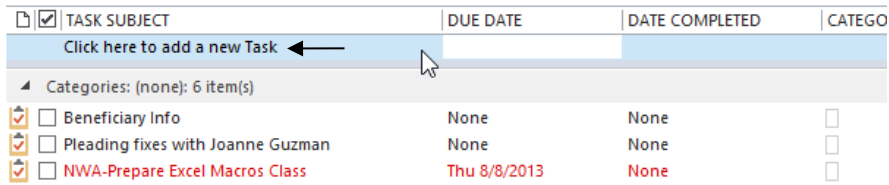
3. Click **Save and Close** when done.



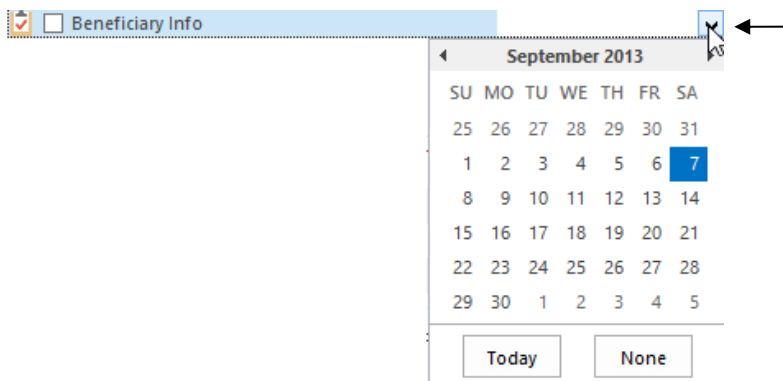
■ **Create a Task Using Click here to add a New Task Box**

This method is great for adding many tasks quickly.

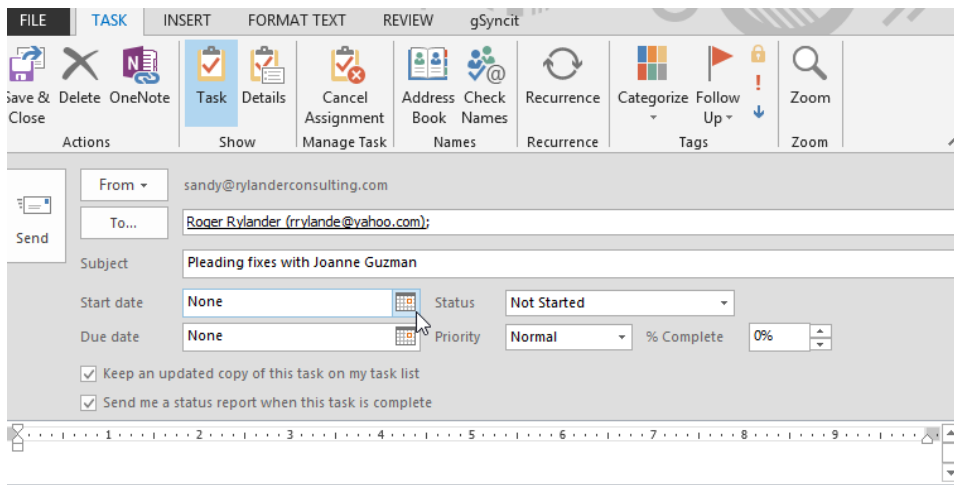
1. Type the task and press **ENTER**. Repeat as necessary.



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.**



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



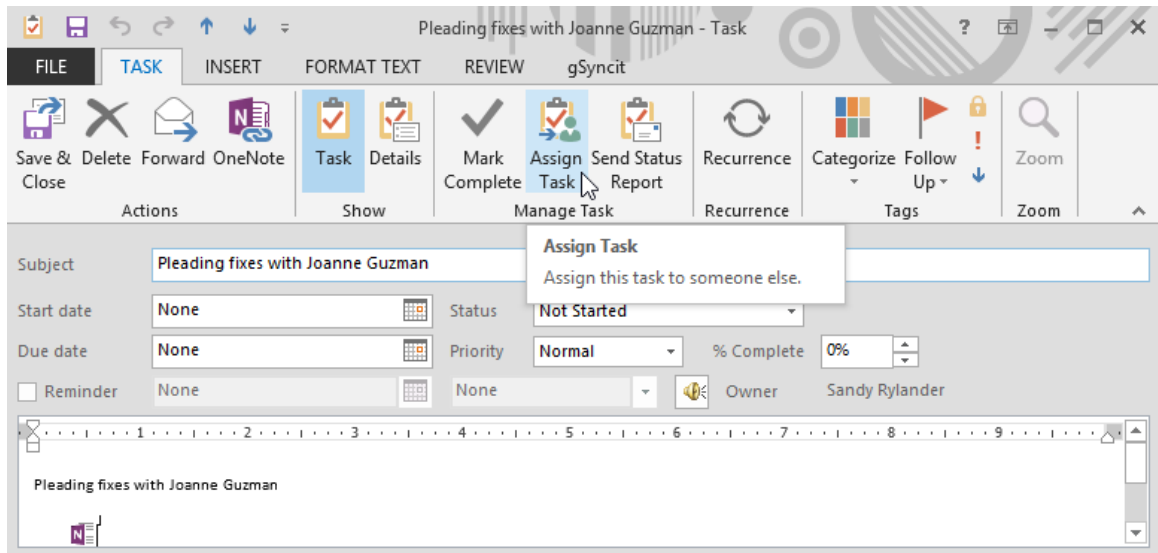
4. You can add reminders, due dates, start dates, status, priority, notes, make the task recurring and mark tasks private etc. just like you did for other items in Outlook.
5. Use the same methods for deleting, printing and adding categories as you did for other Outlook items.
6. Click **Save and Close**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

## Assign Tasks

### Exercise:

#### ■ Assign a Task to a Co-worker

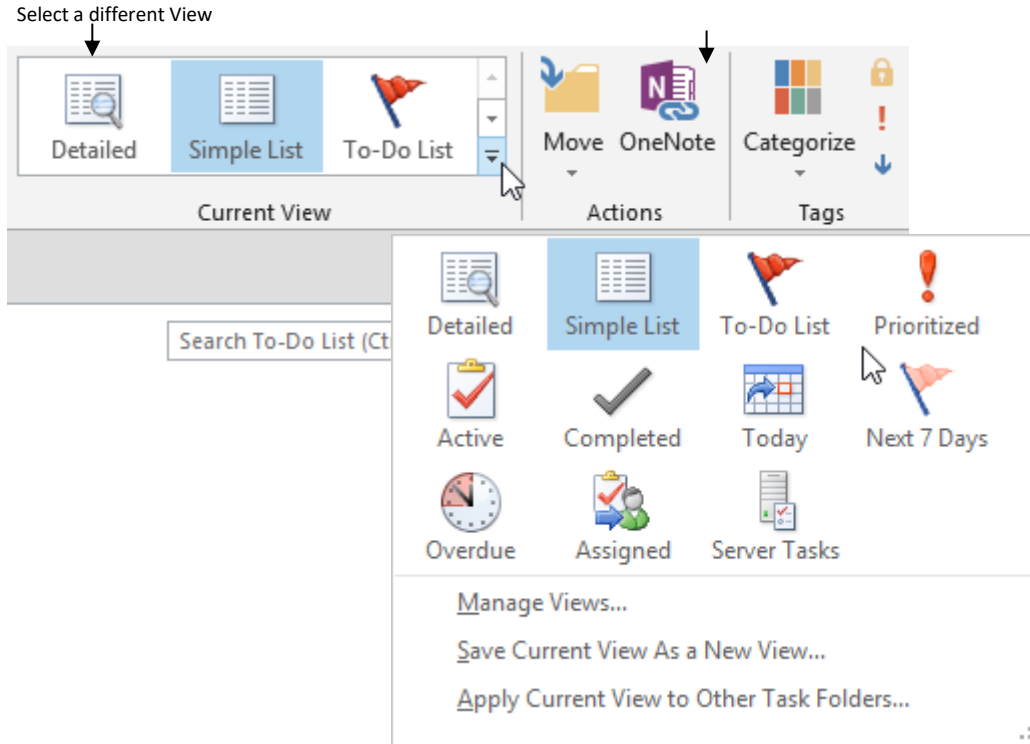
1. **Double click** on a task to open it.
2. Click the **Assign Task tool**.



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.*

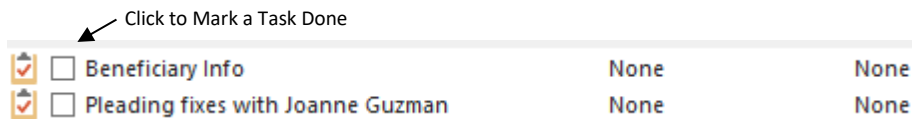


## Delete Tasks or Mark them as Done

### Exercise:

- **Mark a task as done**  
 Only use this if you need to remember the task in the future.

1. Click the Completed checkbox



- **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**

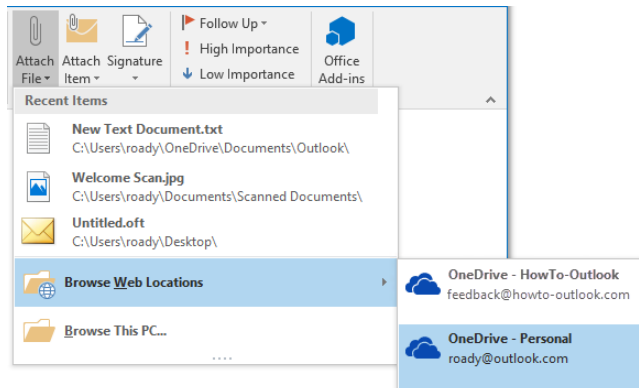
## Email Attachments

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

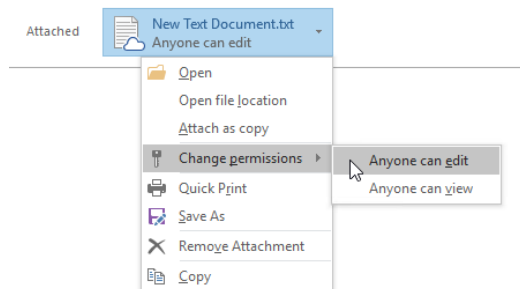
### Send a Link rather than an Attachment if the document is stored in a Cloud location like OneDrive

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

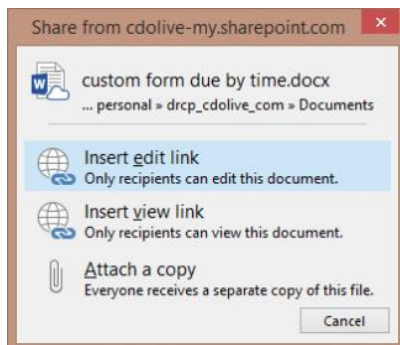
One of the new options is to “Browse Web Locations”. This allows you to access your online storage like OneDrive and Office 365 SharePoint (OneDrive for Business) without needing to download the file to your computer first.



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.



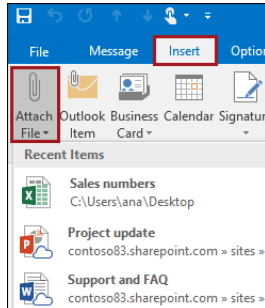
If the file you choose is stored online, you are offered the choice of inserting a link or a copy of the attachment- links are the default. Links to documents can be viewed and edited using SharePoint.



## 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

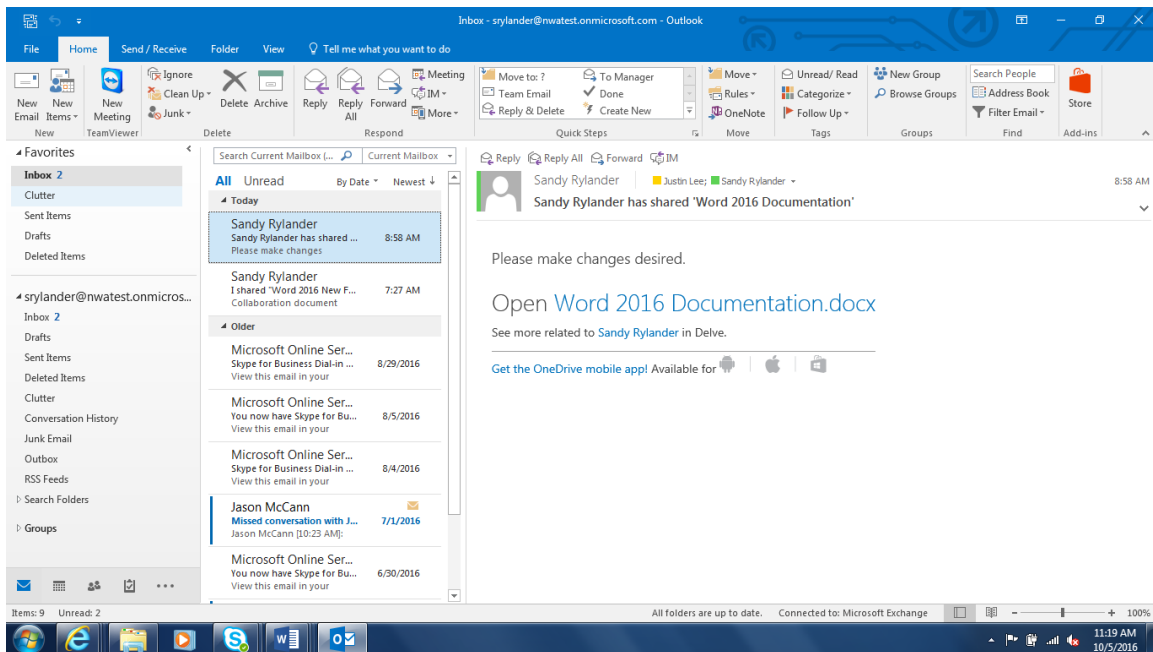
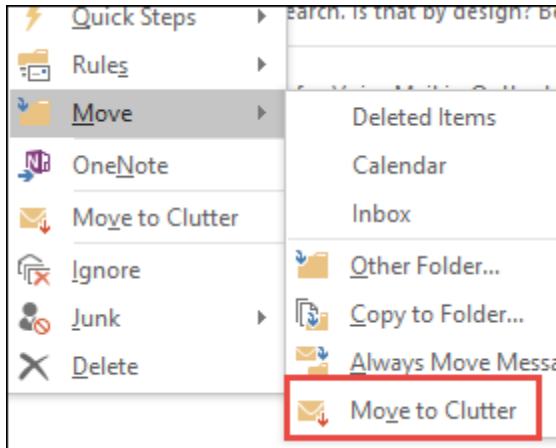
Attachments in messages you receive now appear as buttons in the attachment line. Each button has a menu with attachment options: open, save, preview, delete, etc.



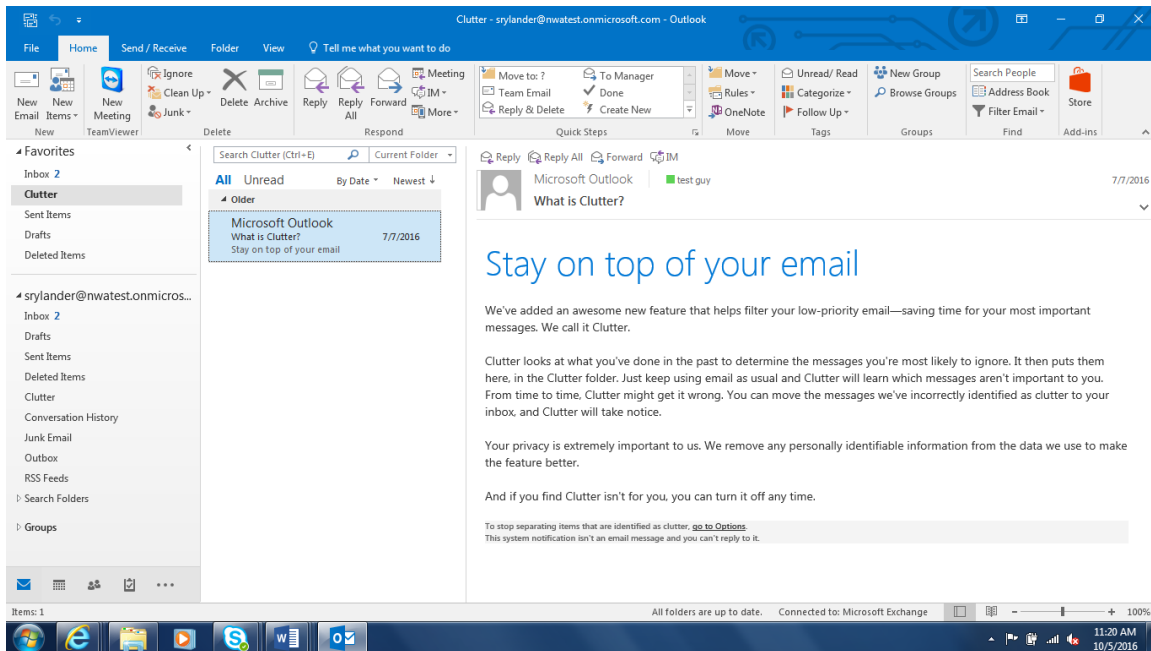
## Clutter - sort low priority messages

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.







**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.

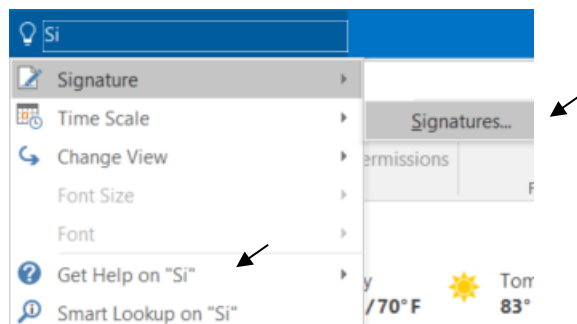
## Tell Me What You Want to Do

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.

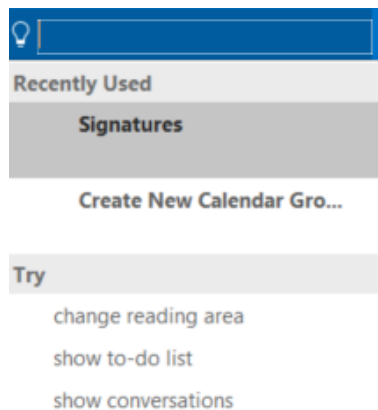
When you type something in the Tell Me field, you’ll actually search through Outlook’s list of commands which are then also useable from list of results.

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.

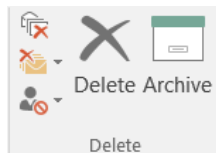


## One Click Archiving (Office 365)

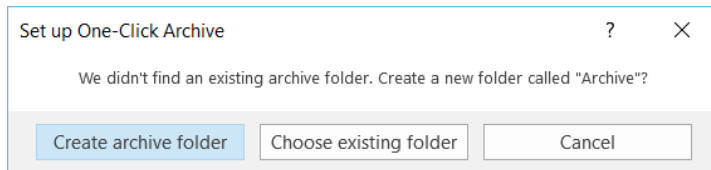
Outlook Office 365 includes a new feature called one-click archiving. This feature allows you to quickly move an item from your Inbox or another folder to an archive folder. An archived item (or items) remains accessible, but doesn't clutter your Inbox.

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:



Choose one of the following:

- Create archive folder.**
  - Choose existing folder.**
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**.
2. 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

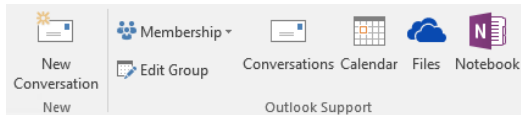
Outlook Office 365 email search is faster, more reliable and provides improved performance. You can seamlessly search email across your local computer, Exchange 16 server or Office 365 Mailbox.

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)

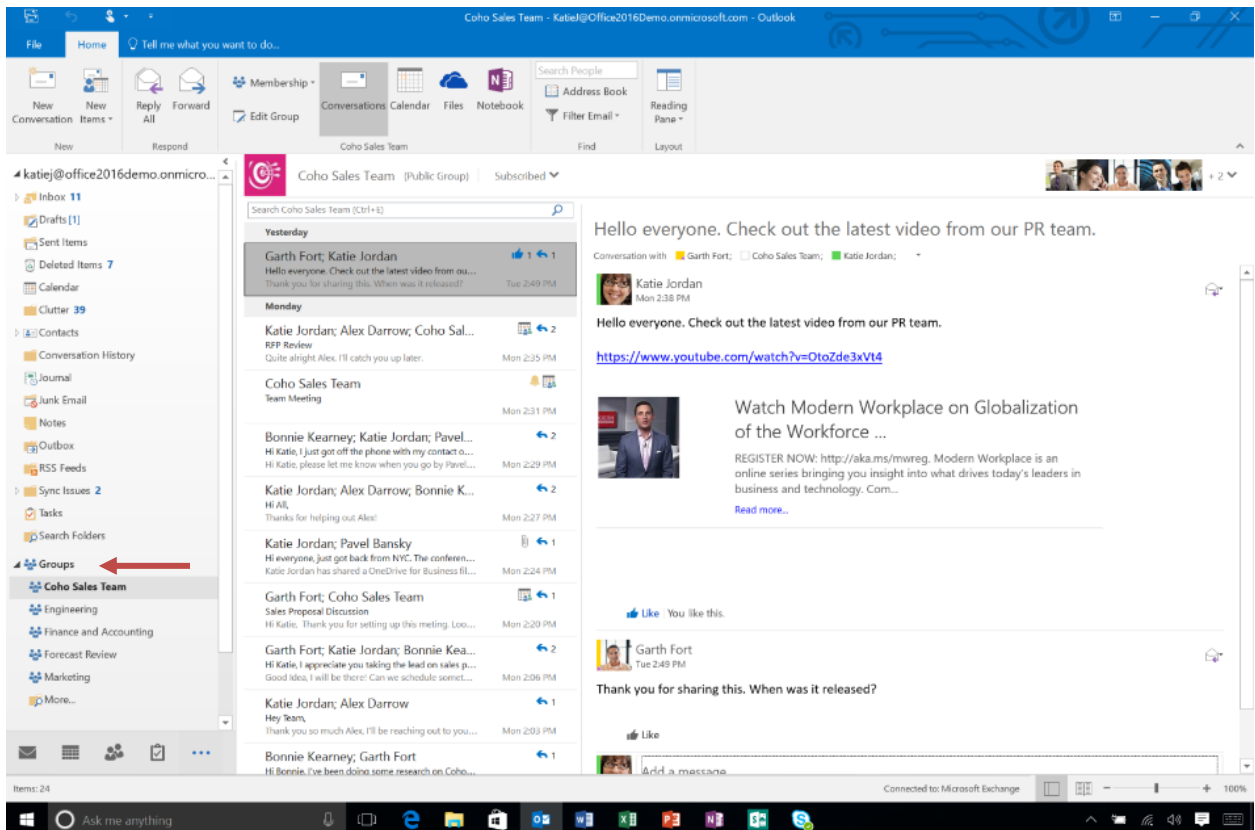
Groups lets users chat instead of email which reduces the strain on their inbox. Groups also lets users share common calendars, OneDrive-hosted files, and OneNote notebooks. Groups are just below your inbox in the left-hand navigation column, below drafts, sent items, and junk mail. In short, a group 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).



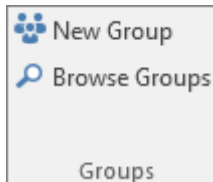
*Ribbon commands for Office 365 Groups.*

**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

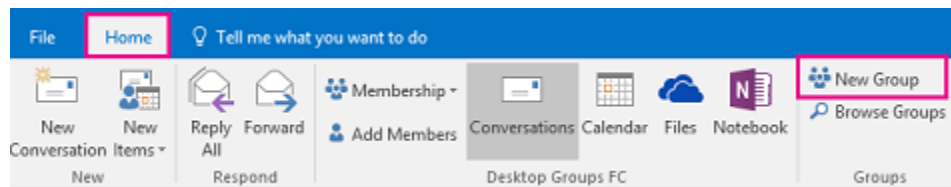
Two new buttons on Outlook Office 365 ribbon's **Home** tab make it easier to browse and create groups.



### Create a Group

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

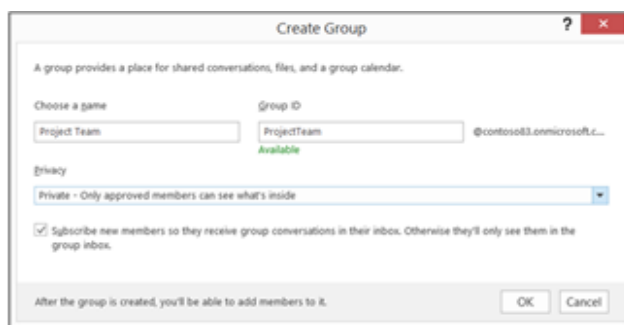
1. Open Outlook Office 365, select a group, and, on the **Home** tab, choose **New Group**.



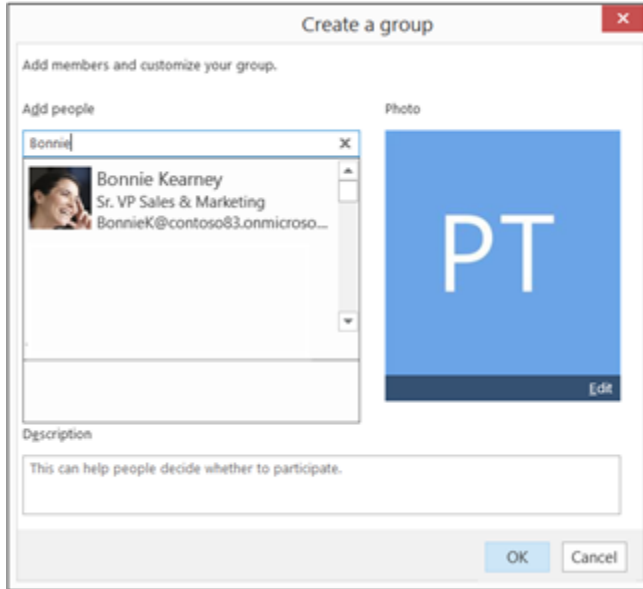
2. In the **Create Group** window, enter the required information, including **Name**, **Group ID**, and **Privacy** level, (Public or Private).

**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**.



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.

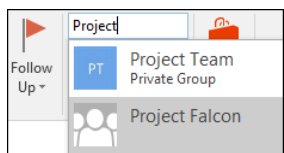
### Search for, join, and go to a group in Outlook Office 365

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.

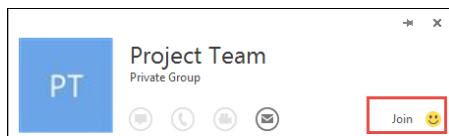
#### Search for a group to join

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.*

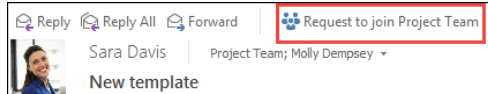




### Join a group from an email

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

1. 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.*

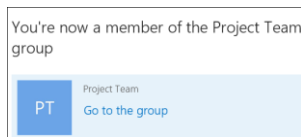


2. Wait for your request to go through, or for the group's admin to add you if you're trying to join a private group.
3. Once you've joined the group, you'll see detailed membership status as well as a shortcut to navigate to the group's Inbox in the group's header.

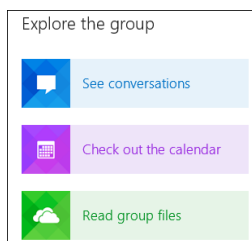
### Go to a group that you were added to as a member

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

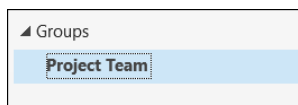
1. Open the email and click **Go to the group** link.



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.



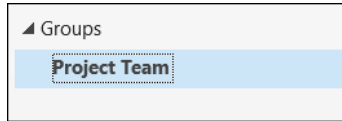
4. All groups that you create or are invited to are on the left NAV bar under **Groups**. Access any of the groups by clicking the group name. Participate in conversations or use the options on the ribbon to access the files, calendar, notebook, and other information.



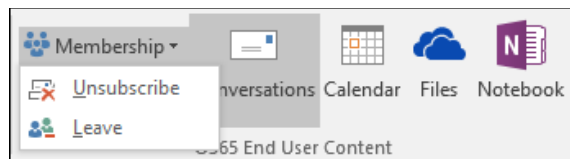
**NOTE:** If you are using Outlook 2013 and click the link in the invite, you'll be redirected to Outlook Web App to view the group's information and start communicating. However, you can view the group's email in your Outlook Inbox and reply.

**Leave or unsubscribe from a group, do the following:**

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

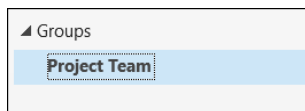


2. Choose **Membership** on the ribbon. Then select:
  - **Unsubscribe** You'll still be a part of the group, but won't receive any conversations or invitations in your inbox.
  - **Leave** You'll no longer be a part of the group and won't be able to access the files or other data.

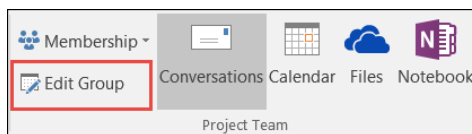


**Edit information related to the group or delete it if you no longer need it.**

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



2. Select **Edit Group** on the ribbon.



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.
- 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**.

