Your easy, colorful,
SEE-HOW guide!

Microsoft

Plain & Simple

Microsoft Outlook 2013

Jim Boyce

www.it-ebooks.info

Learn the simplest ways to get things done with Microsoft Outlook 2013

See it.
Learn it.
In color.

Here's WHAT You'll Learn

- Format and send messages, files, and photos
- Manage your contacts and social networks
- Control your email flow; limit junk mail
- Share your calendar; organize your schedule
- Tailor your inbox to best suit you
- Organize the data you keep in Outlook

Here's HOW You'll Learn It

- Jump in wherever you need answers
- Follow easy *steps* and *screenshots* to see exactly what to do
- Get handy *tips* for new techniques and shortcuts
- Use *Try This!* exercises to apply what you learn right away

ISBN: 978-0-7356-6935-2

90000

9 780735 669352

U.S.A. $24.99
Canada $26.99
[*Recommended*]

Microsoft Office/
Microsoft Outlook

Office

www.it-ebooks.info

Microsoft

Microsoft

Outlook 2013 Plain & Simple

Jim Boyce

www.it-ebooks.info

Pub shed w th the author zat on of M crosoft Corporat on by
O'Re y Med a, Inc
1005 Gravenste n H ghway North
Sebastopo , Ca forn a 95472

Copyr ght © 2013 by J m Boyce

A r ghts reserved No part of the contents of th s book may be reproduced or transm tted n any form or by any means w thout the wr tten perm ss on of the pub sher

ISBN 978-0-7356-6935-2

1 2 3 4 5 6 7 8 9 QG 8 7 6 5 4 3

Pr nted and bound n the Un ted States of Amer ca

M crosoft Press books are ava ab e through bookse ers and d str butors wor dw de If you need support re ated to th s book, ema M crosoft Press Book Support at msp nput@m crosoft com P ease te us what you th nk of th s book at *http://www.microsoft.com/learning/booksurvey*

M crosoft and the trademarks sted at *http://www.microsoft.com/about/legal/en/us/IntellectualProperty/Trademarks/EN-US.aspx* are trademarks of the M crosoft group of compan es A other marks are property of the r respect ve owners

The examp e compan es, organ zat ons, products, doma n names, ema addresses, ogos, peop e, p aces, and events dep cted here n are fict t ous No assoc at on w th any rea company, organ zat on, product, doma n name, ema address, ogo, person, p ace, or event s ntended or shou d be nferred

Th s book expresses the author's v ews and op n ons The nformat on conta ned n th s book s prov ded w thout any express, statutory, or mp ed warrant es Ne ther the authors, O'Re y Med a, Inc , M crosoft Corporat on, nor ts rese ers, or d str butors w be he d ab e for any damages caused or a eged to be caused e ther d rect y or nd rect y by th s book

Acquisitions and Developmental Editor: Kenyon Brown
Production Editor: Kara Ebrah m
Technical Reviewer: V ncent Avere o
Copyeditor: R chard Carey
Indexer: Ange a Howard
Cover Design: Tw st Creat ve • Seatt e
Cover Composition: Zyg Group, LLC
Illustrator: S4 Car s e Pub sh ng Serv ces

www.it-ebooks.info

For my wife Julie, who continues to put up with me

for reasons known only to her.

www.it-ebooks.info

www.it-ebooks.info

Contents

1 **About this book** 1

A quick overview 2
A few assumptions 5
Adapting task procedures for touchscreens 5
A final word (or two) 6

2 **What's new in Outlook 2013?** 7

Using message list commands 8
Working in the Reading pane 10
Using Calendar preview 12
Working in the People Hub 13
Using the Weather bar 15
Working with cached Exchange mode 16

3 **Getting started** 19

Outlook 2013 at a glance 20
Starting and exiting Outlook 22
Exploring Outlook folders 23
Working with Outlook items 25

www.it-ebooks.info

Setting up email accounts 27
Viewing items and folders 31
Getting help in Outlook 2013 34

4 **Writing and sending email 35**
Writing an email message 36
Working with the Address Book 38
Working with contact groups 41
Changing message text 44
Formatting message text 47
Using signatures 50
Working with HTML stationery 54
Sending a file by email 56
Sending messages manually 60
Reviewing sent messages and drafts 62

5 **Receiving and reading email 65**
Receiving email 66
Reading email 68
Managing the Inbox folder 70
Working with attachments 74
Replying to and forwarding email 76
Handling junk mail 78
Working with the Rules Wizard 81
Following up on a message 88

www.it-ebooks.info

6 **Working with the People Hub 91**

Working with social networking accounts and contacts 92
Adding a new contact 97
Inserting items into a contact record 100
Viewing your contacts 104
Viewing contact status and activities 106
Finding a contact 109
Organizing your contacts 115
Customizing People Hub and contact views 118
Communicating with contacts 123

7 **Managing a calendar 127**

Viewing your calendar 128
Using the To-Do Bar 131
Adding appointments 133
Adding and modifying events 136
Adding meetings 138
Modifying meetings and tracking responses 140
Inserting an Outlook item into a calendar item 142
Attaching a file or document to a calendar item 144
Inserting the contents of a document into a calendar item 146
Inserting an Excel object into a calendar item 149

www.it-ebooks.info

Sharing calendar information 151
Printing calendars 153

8 **Working with tasks 157**
Working in the Tasks folder 158
Viewing tasks 160
Adding tasks 162
Working with recurring tasks 164
Modifying and updating a task 167
Inserting an Outlook item into a task 170
Inserting a file into a task 172
Assigning a task to someone else 174
Accepting or rejecting assigned tasks 176

9 **Using alerts and mobile features 177**
Setting up your mobile phone in Microsoft Exchange 178
Setting up calendar alerts 182
Setting up mobile alerts for important messages 184

10 **Using Outlook with SharePoint 187**
Using SharePoint calendars with Outlook 188
Using SharePoint contacts in Outlook 192
Using SharePoint document libraries in Outlook 196

www.it-ebooks.info

11 **Using Lync with Outlook** **199**
Creating and joining Lync meetings 200
Setting Lync meeting options 203
Starting an instant message conversation 205
Starting voice and video calls 208

12 **Managing items and folders** **211**
Using categories 212
Adding your own categories 214
Renaming and deleting categories 216
Creating search folders 218
Organizing with folders 220
Cleaning up folders 222
Deleting items 224

13 **Managing your Outlook files** **227**
Working with Outlook data files 228
Importing and exporting items 232
Backing up and restoring a data file 237
Archiving Outlook data files 241

www.it-ebooks.info

14 **Customizing Outlook 245**

Using read and delivery receipts 246
Choosing message formats. 248
Setting Calendar options. 250
Customizing the Folder pane 253
Adding Outlook folders and SharePoint sites to the Shortcuts page 256
Customizing the Outlook ribbon 259
Customizing the Quick Access Toolbar 263

Index 265

www.it-ebooks.info

About this book

1

If you want to get the most from your computer and your software with the least amount of time and effort—and who doesn't?—this book is for you. You'll find Microsoft Outlook 2013 Plain & Simple to be a straightforward, easy-to-read reference tool. With the premise that your computer should work for you, not you for it, this book's purpose is to help you get your work done quickly and efficiently so that you can get away from the computer and live your life.

In this section:

- A quick overview
- A few assumptions
- Adapting task procedures for touchscreens
- A final word (or two)

www.it-ebooks.info

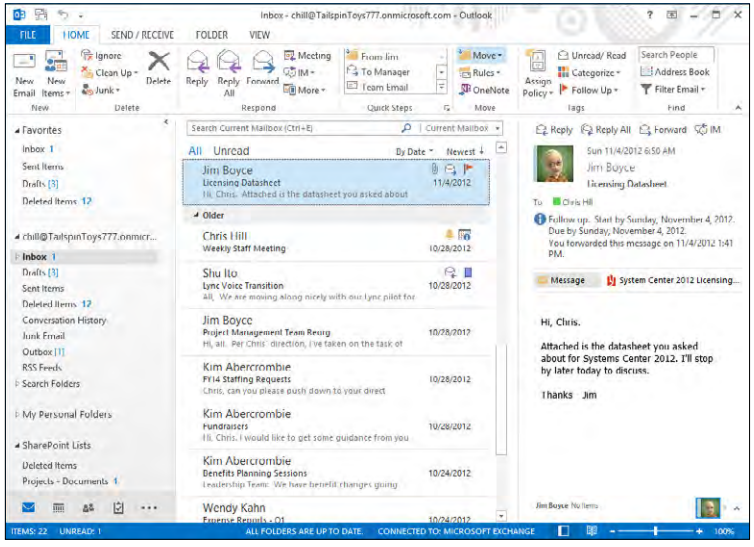
A quick overview

Your computer probably came with Outlook preinstalled, but if you have to install it yourself, the Setup Wizard makes installation so simple that you won't need my help anyway. So, unlike many computer books, this one doesn't start with installation instructions and a list of system requirements.

You don't have to read the sections of this book in any particular order. You can jump in, get the information you need, and then close the book and keep it near your computer until the next time you need to know how to get something done. But, that doesn't mean the information is scattered wildly about. The book is organized so that the tasks you want to accomplish are arranged in two levels—you'll find the overall type of task you're looking for under a main section title, such as "Working with contact groups," "Setting up email accounts," "Communicating with contacts," and so on. Then, in each of those sections, smaller tasks are arranged in a loose progression from the simplest to the more complex.

Section 2, "What's new in Outlook 2013," provides an overview of the most common changes and notable new features in Outlook 2013 such as the interface changes and new social networking features. If you have been a user of Outlook 2010 or earlier, Section 2 gives you a good idea of what's new.

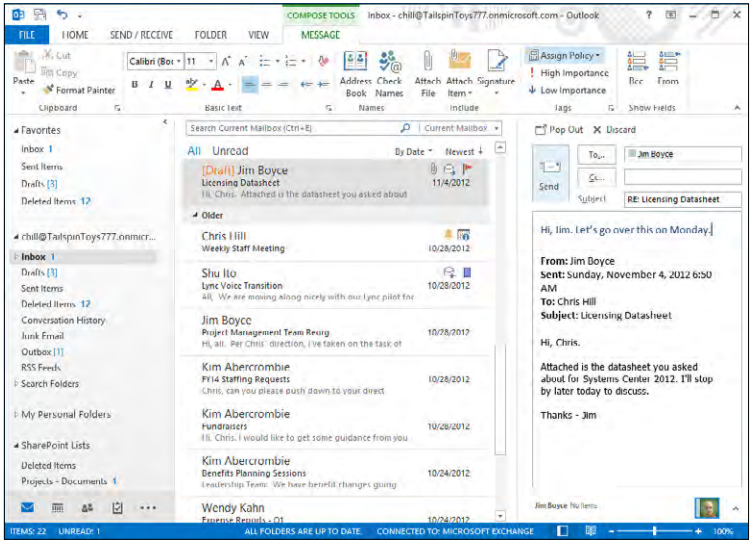
Section 3, "Getting Started," introduces you to Outlook functions; it explains how to start and exit the program, work with the Outlook program window, and use the standard set of folders in Outlook. You also learn how to set up email accounts, import data into Outlook from other programs, and work with items such as email messages, contacts, and appointments. Information about how to get help and troubleshoot problems rounds out the section.

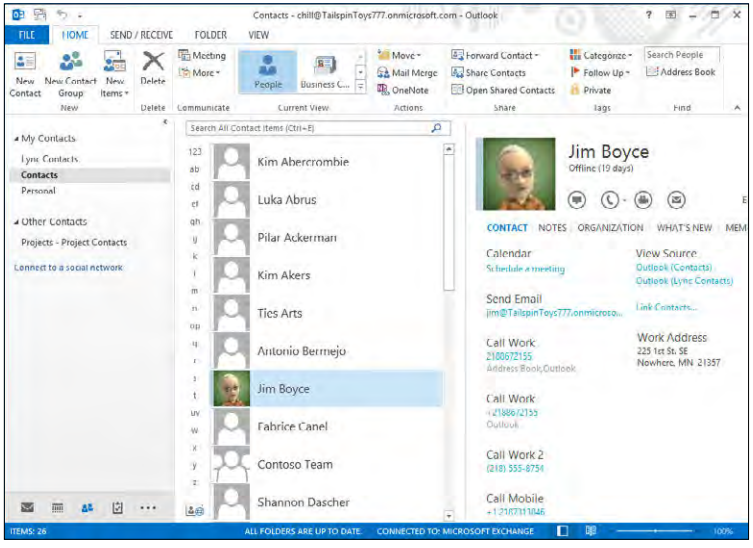


www.it-ebooks.info

Sections 4, "Writing and sending email," and 5, "Receiving and reading email," explain how to work with email messages in Outlook, including addressing messages, using the Address Book, and working with contact groups. Section 4 teaches you how to change and format message text to add emphasis or highlight information. You also learn how to incorporate designs and color schemes to give messages the look of stationery. Section 4 finishes with a look at how to send files with messages, review messages you've already sent, and keep messages in the Drafts folder until you're ready to send them. Section 5 covers several topics about receiving and reading email and helps you manage, filter, and follow up on messages.

Keeping track of your contacts' addresses, phone numbers, and other information is one of the main uses for Outlook, and Section 6, "Working with the People Hub," acquaints you with this feature, which in previous versions of Outlook was referred to as the Contacts folder. You learn how to add social networking accounts such as Facebook and LinkedIn to Outlook. You also learn how to add new contacts, view and change contacts, and find a particular person. The section also explains how to organize contacts, schedule meetings for a contact, and communicate with people through the Contacts folder. The section finishes with a look at how to share contacts with others, keep track of phone calls, and associate contacts with items such as tasks.





www.it-ebooks.info

Section 7, "Managing a calendar," covers the Calendar folder and how to view your schedule, add appointments and meetings, associate files or other items with schedule items, and work with reminders. You also learn how to share your calendar, print calendars, and use the To-Do Bar to keep track of your tasks without leaving the Calendar folder.

Section 8, "Working with tasks," expands on Section 7's coverage of tasks and explains how to use the Tasks folder. You can assign tasks to yourself or to others, associate contacts and other items with tasks, and mark tasks as complete.

Section 9, "Using alerts and mobile features," covers the mobile features of Outlook 2013, such as setting up alerts to your mobile device for calendar events, messages, and voice mail.

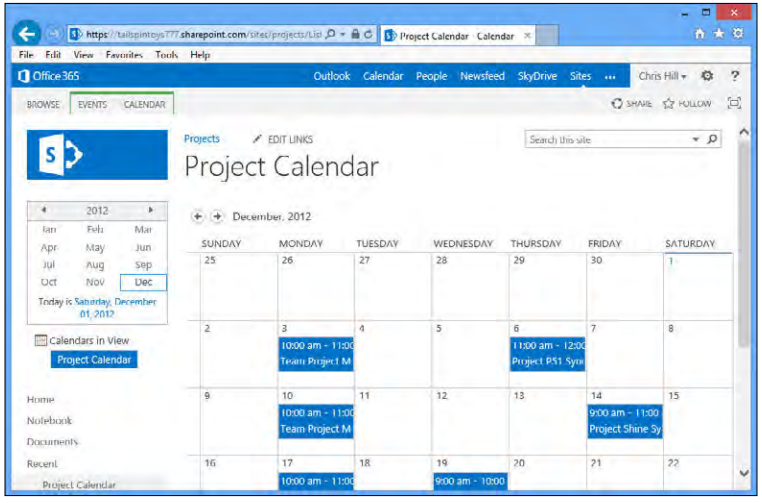
Section 10, "Using Outlook with SharePoint," explains how to integrate Microsoft SharePoint sites with Outlook, which enables you to view shared calendars, contacts, document libraries, and other SharePoint items in Outlook. You can also work with those SharePoint items right from Outlook without ever opening the SharePoint site. Section 10 also looks at the presence features in Outlook that help you see when others are online.

Section 11, "Using Lync with Outlook," explores the integration between Outlook and Microsoft Lync. Here you learn how to join a Lync meeting from Outlook, create new Lync (online) meetings, and set online meeting options. The section also explores other that ways you can communicate with colleagues through Outlook and Lync, including instant messaging and voice calls.

Section 12, "Managing items and folders," helps you start to organize the data you keep in Outlook. Here you learn to create categories and organize Outlook items with categories, create and manage folders, delete items, and automatically move items out of your regular Outlook storage file and into an archive file. Archiving keeps your Outlook data file lean while still letting you hang on to important messages.

Section 13, "Managing your Outlook files," helps you work with and manage the files in which Outlook stores your data. You learn to create new data files, import and export items in Outlook, and back up and restore your Outlook data file.

Outlook offers a wealth of options that you can use to change the way the program looks and works, and Section 14, "Customizing Outlook," shows you how to set options for each of the Outlook folders and item types. The section also explains how to customize the Outlook folder pane, ribbon, and Quick Access Toolbar.



www.it-ebooks.info

A few assumptions

I had to make a few educated guesses about you—my audience—when I started writing this book. Perhaps your computer is solely for personal use—email, surfing the Internet, playing games, and so on. Possibly your work makes it possible for you to telecommute. Or, maybe you run a small home-based business. Taking all these possibilities into account, I assumed that you either use a stand-alone home computer or have two or more computers connected so that you can share files, a printer, and so on. I also assumed that you have an Internet connection.

Another assumption is that—initially, anyway—you use Outlook just as it came, meaning that you use the standard views and standard menus rather than custom ones, and that you use your little friend, the mouse, in the traditional way: that is, you point and click to select an item and then double-click to open it. If you prefer using the mouse as if you are working on a webpage—pointing to an item to select it and then opening it with a single click—you can easily do so. To switch between single-click and double-click, open the Folder Options applet from the Control Panel. Use the Click Items As Follows controls to choose the method you prefer. However, because my working style is somewhat traditional, and because Outlook is set up to work in the traditional style, that's the style followed in the procedures and graphics throughout this book.

Adapting task procedures for touchscreens

In this book, I provide instructions based on traditional keyboard and mouse input methods. If you're using Outlook on a touch-enabled device, you might be giving commands by tapping with your finger or with a stylus. If so, substitute a tapping action any time I instruct you to click a user interface element. Also note that when I tell you to enter information in Outlook, you can do so by typing on a keyboard, tapping in the entry field under discussion to display and use the onscreen keyboard, or even speaking aloud, depending on how your computer is set up and your personal preferences.

www.it-ebooks.info

A final word (or two)

I had three goals in writing this book:

1. Whatever you want to do, I want the book to help you get it done.
2. I want the book to help you discover how to do things that you didn't know you wanted to do.
3. And, finally, if I achieve the first two goals, I'm well on the way to the third: I want this book to help you enjoy using Outlook.

I hope you find *Microsoft Outlook 2013 Plain & Simple* a great learning tool. Of course, the best way to learn is by doing—so jump right in!

www.it-ebooks.info

What's new in Outlook 2013?

2

Microsoft Outlook 2013 not only has a new look, but also has some great new features. These changes combine to make Outlook more visually appealing and easier to use. For example, reply emails no longer open up by default in a new window; instead, you can edit them right in the Reading pane. Other changes are more significant, such as the integration of social networking accounts like Facebook and LinkedIn, which brings all of your contacts together in one place.

We can't cover every new feature in this section, but we do cover some of the more popular features, along with the ones that will have the most impact. So, let's dig in!

In this section:

- Using message list commands
- Working in the Reading pane
- Using Calendar preview
- Working in the People Hub
- Using the Weather bar
- Working with cached Exchange mode

www.it-ebooks.info

Using message list commands

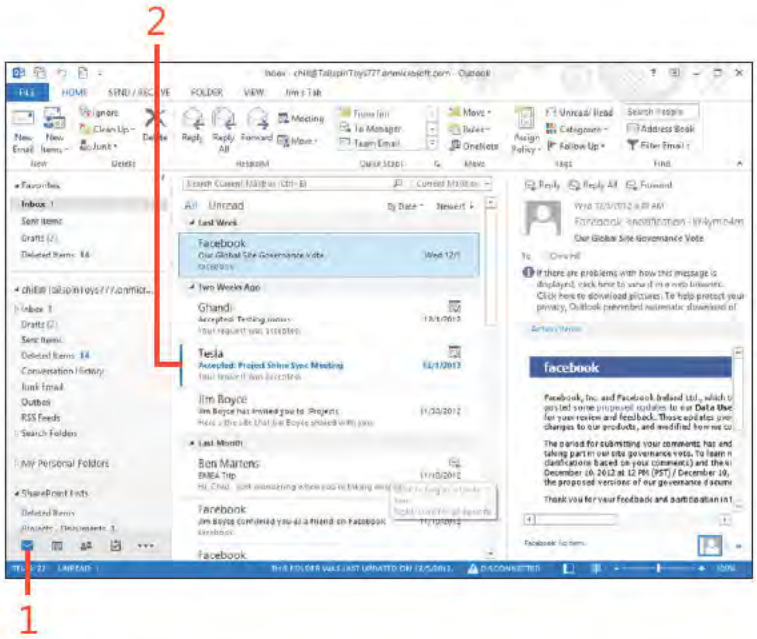
Outlook 2013 adds features to make it easier to work in a single Outlook view without switching windows. One of these new features is the addition of a small selection of email commands that you can use right in the message list to mark messages as read or unread, flag messages, and delete them.

Work with message list commands

1 At the bottom of the Fo der pane, c ck the Ma con to open the Inbox

2 Hover the po nter on the eft edge of a message

(continued on next page)



TIP Some features in Outlook 2010 have been removed or deprecated. For example, the Journal features are no longer available. The Notes folder is still available, but most of the options for working with Notes have been removed.

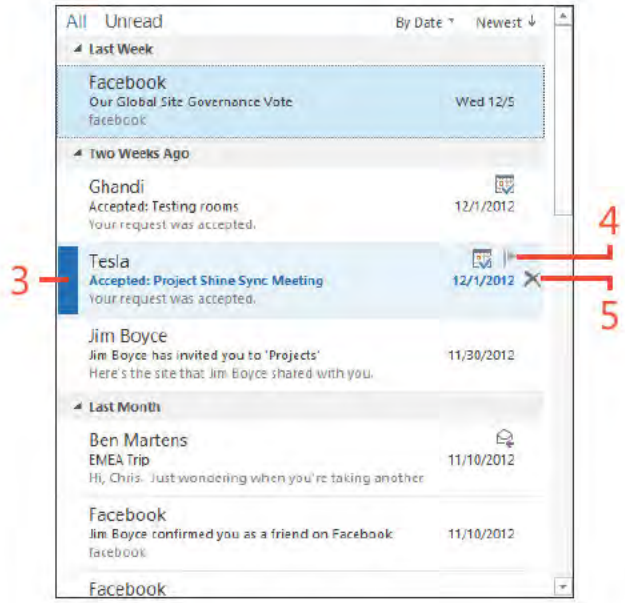
www.it-ebooks.info

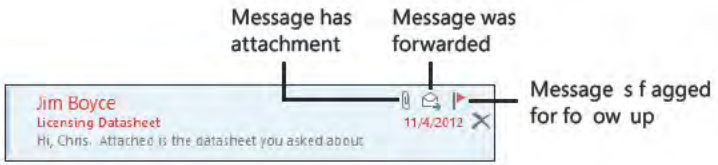
Work with message list commands *(continued)*

3 C ck to mark the message as read (or unread)

4 C ck to f ag the message for fo ow up

5 C ck to de ete the message





TIP Icons at the upper-right corner of the message provide status for the message, such as indicating that you have replied to or forwarded a message, that the message has an attachment, that a meeting invitation has been accepted or declined, or that the message is flagged for follow-up.

www.it-ebooks.info

Working in the Reading pane

In previous versions of Outlook, you previewed messages in the reading pane but edited them in a separate window. In Outlook 2013, you can edit messages for replies and forwards directly in the reading pane. If you prefer not to edit in the reading pane (for example, you want to move the message window to a different monitor and continue to preview messages on another), you can pop out the message and edit in its own window.

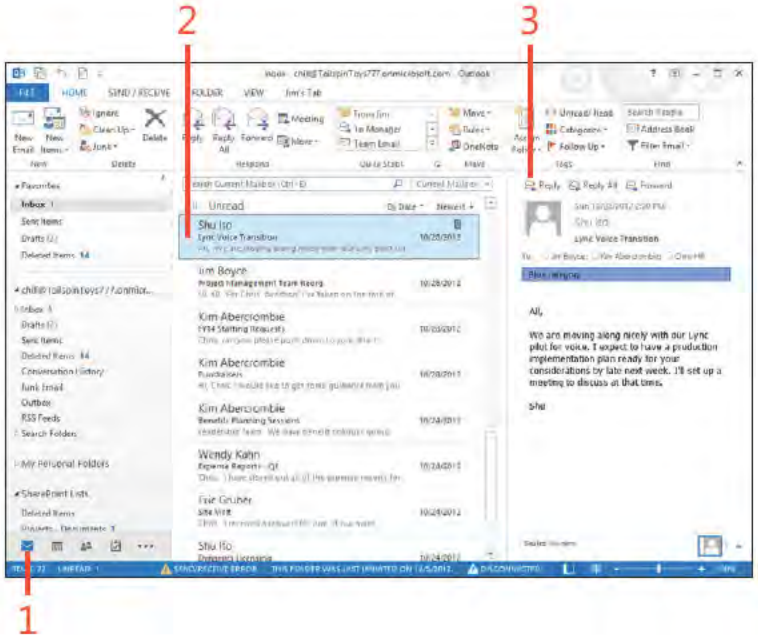
Edit email in the reading pane

1 At the bottom of the Fo der pane, c ck the Ma con to open the Inbox

2 C ck a message to se ect t

3 In the read ng pane, c ck Rep y

(continued on next page)



TIP You can reply, reply all, or forward a message by using the buttons in the Reading pane. Also, if you start editing a message in the Reading pane and then decide you want to discard the edits, just click the Discard button.

www.it-ebooks.info

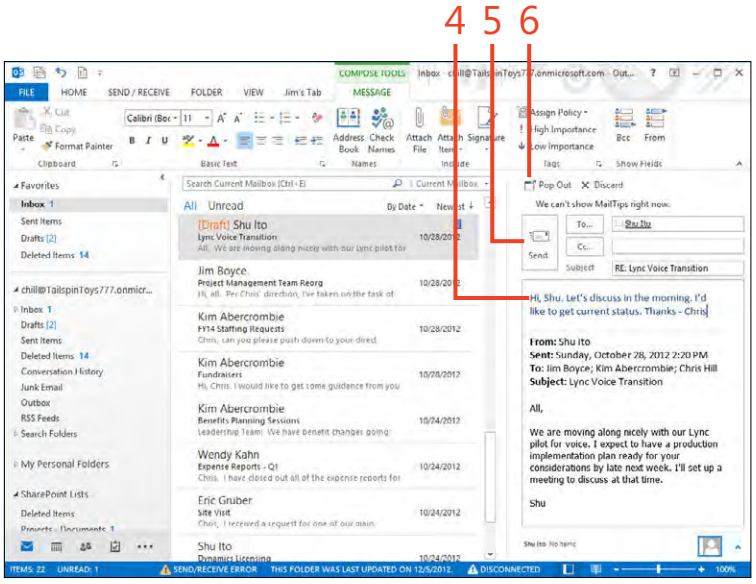
Edit email in the reading pane *(continued)*

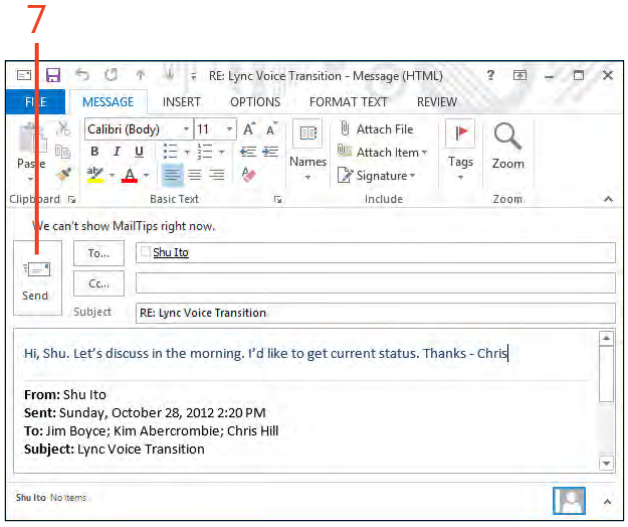
4 Type your rep y

5 C ck Send

6 A ternat ve y, to open the message n ts own w ndow, c ck Pop Out

7 F n sh ed t ng the message and c ck Send





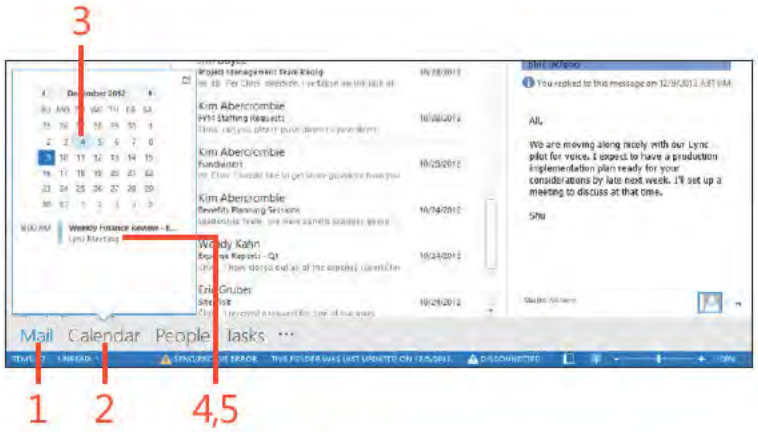
www.it-ebooks.info

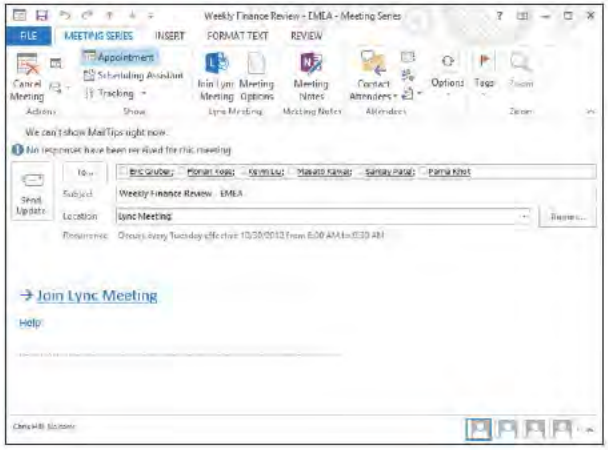
Using Calendar preview

If you have multiple monitors, you might keep your Calendar open on one monitor and your Inbox open on another. This way, you can see your Calendar without switching away from your mail. Outlook 2013 users now have a new way to preview their calendars right in their mailboxes. This handy new feature makes it possible to preview your calendar without ever leaving your mailbox.

Preview Calendar items in the Inbox

1 C ck the Ma nk to open the Inbox
2 Hover the po nter on the Ca endar nk
3 C ck a date to v ew a day other than the current day
4 Prev ew the ca endar tems for the se ected day
5 Doub e-c ck an tem to open t for v ew ng or ed t ng





TIP By default, the Calendar preview in the Inbox shows calendar items from the current day. Use the arrows on either side of the month in the preview to choose a different month.

TRY THIS The People Hub also offers a preview. In the folder pane, hover the pointer on the People icon; Outlook displays a list of the contacts in your Favorites.

www.it-ebooks.info

Working in the People Hub

The People Hub combines the new capability in Outlook 2013 to integrate social networking accounts, with a new People view that presents most of a contact's information in an easily consumed view. As you might expect, the new People view provides features to help you easily work with a selected contact. Thanks to Microsoft Lync integration, you can not only view contact information and start an email to a contact from the People Hub, but you can also start an instant message, voice call, or video call.

View contacts in the People pane

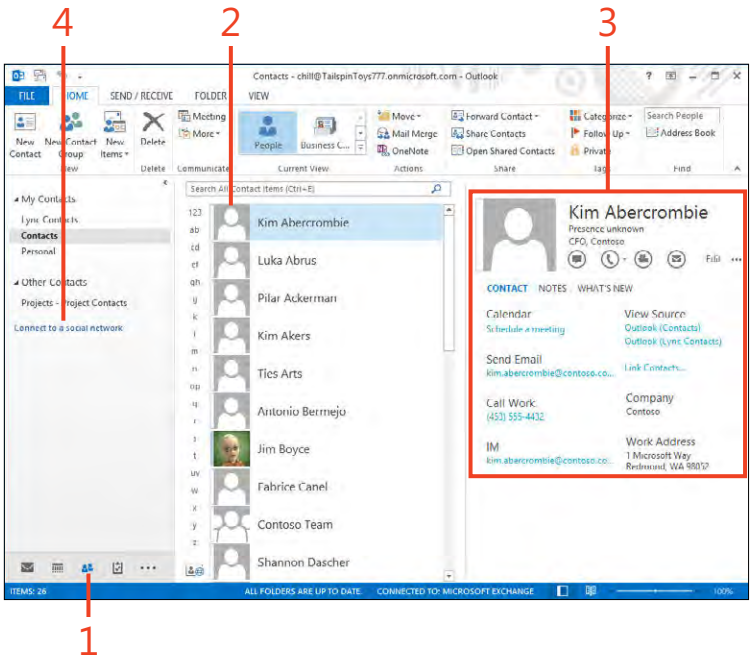
1 At the bottom of the Fo der pane, c ck the Peop e con to open the Peop e Hub

2 In the Peop e pane, se ect a contact

3 V ew the contact nformat on n the Contact card

4 In the Fo der pane, c ck the Connect To A Soc a Network nk

(continued on next page)

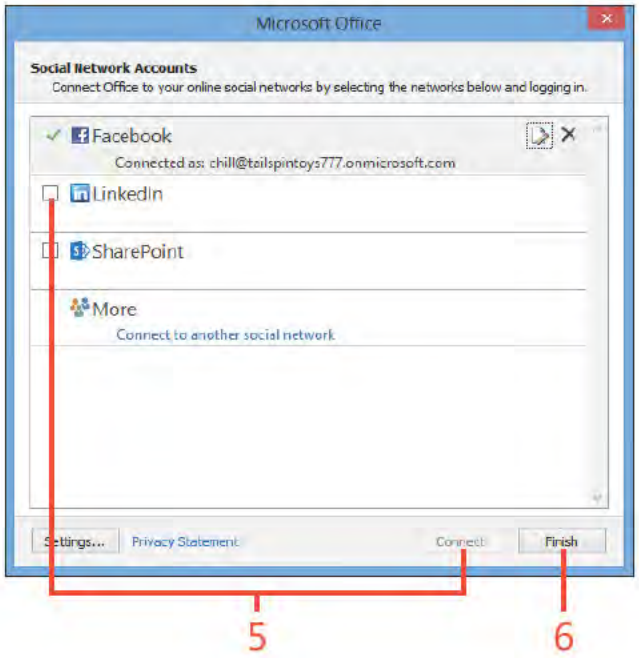


www.it-ebooks.info

View contacts in the People pane *(continued)*

5 Se ect a soc a network ng serv ce and then c ck Connect to og on to that serv ce and connect t to Out ook

6 C ck F n sh



TIP Using the Facebook and LinkedIn connectors, you can connect your Facebook and LinkedIn accounts to Outlook and access contacts. With the SharePoint connector, you can incorporate SharePoint contacts.

www.it-ebooks.info

Using the Weather bar

A new addition to the Calendar is the Weather bar, which shows a brief summary of the weather in selected locations. You can add locations by name or Postal Code. You can choose the location from a menu.

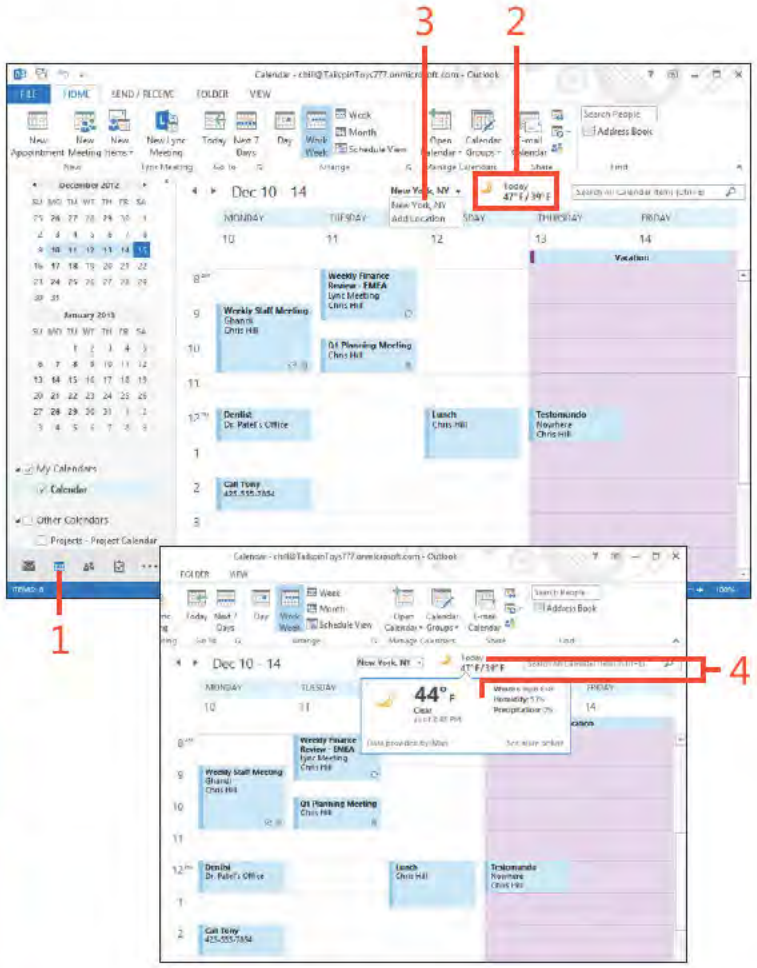
Add a location to the Weather bar

1 Open the Ca endar

2 V ew the sky cond t on and temperature for the se ected defau t ocat on

3 C ck the ocat on name, c ck Add Locat on, and then type a oca- t on name or Posta Code and press Enter

4 Hover the po nter on the d sp ayed weather to v ew more deta s



TRY THIS Enter a Postal Code or a location name to add a weather location to Outlook.

TIP The option to turn on or off display of weather in the Calendar is located on the Calendar page of the Outlook Options dialog box.

www.it-ebooks.info

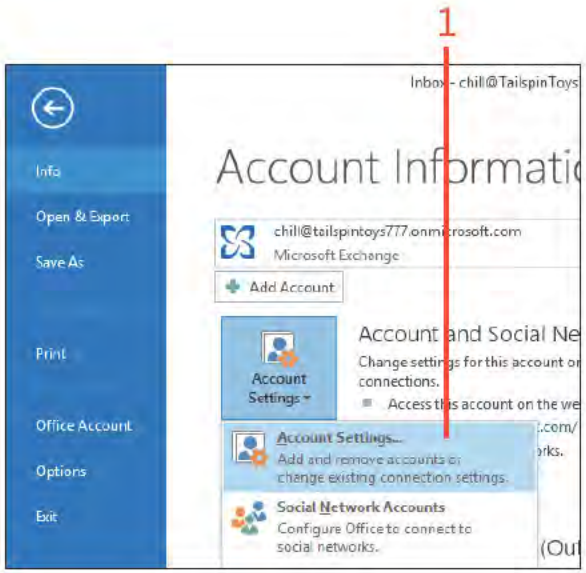
Working with cached Exchange mode

A new feature in Outlook 2013 when used in conjunction with Microsoft Exchange is the capability to specify how many months of content to keep cached locally. For example, if you are working from a tablet, you might want to limit Outlook to caching only a month's worth of data to conserve device storage space. You configure the amount of data Outlook will cache through the account settings for the Exchange account.

Configure offline cache

1 On the r bbon, c ck the F e tab to d sp ay the Backstage v ew, c ck the Account Sett ngs button, and then choose Account Sett ngs

(continued on next page)



TIP You can configure the cache for a minimum of one month or a maximum of all. The latter causes Outlook to cache all data from your Exchange Server account.

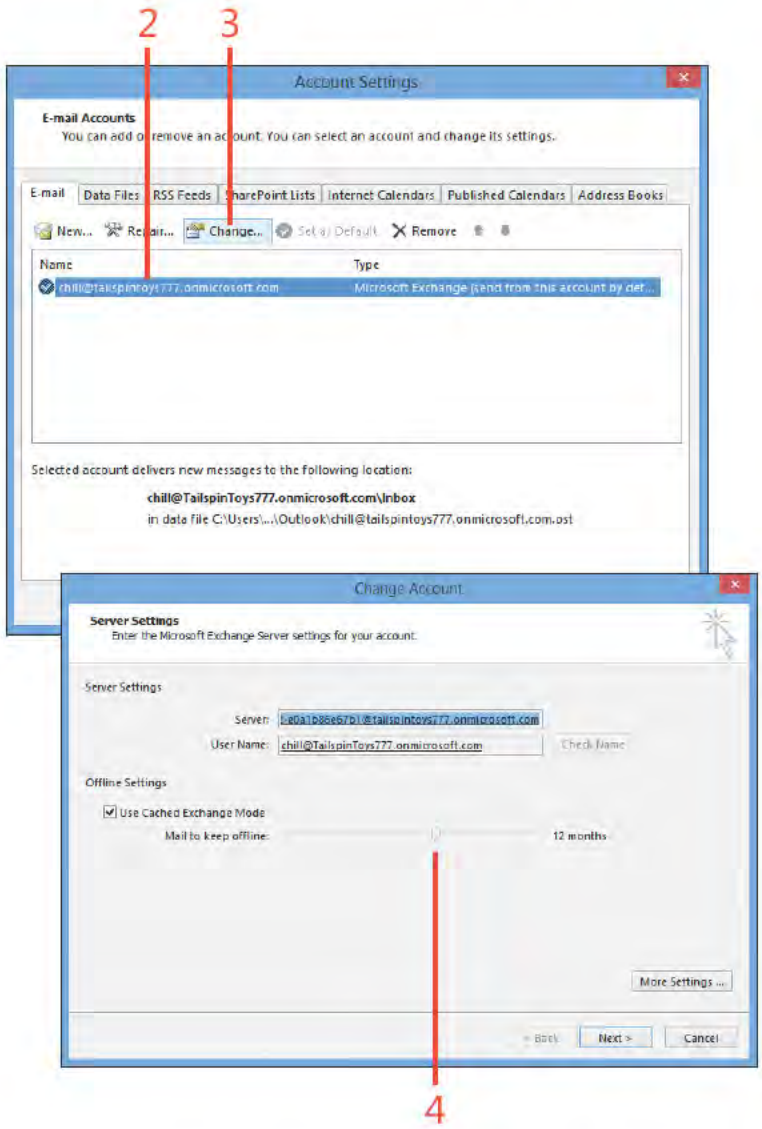
www.it-ebooks.info

Configure offline cache *(continued)*

2 In the Account Sett ngs d a og box, c ck the Exchange Server account

3 C ck Change

4 In the Change Account d a og box, drag the s der eft or r ght to change the amount of data to cache



www.it-ebooks.info

www.it-ebooks.info

Getting started

3

Microsoft Outlook 2013 can help you manage almost every aspect of your day. With Outlook, you have tools to manage your email, contacts, calendar, and tasks. Using these tools, you can even keep track of your phone calls, time spent on documents, and other tasks and events. With new social networking features like Facebook and LinkedIn account integration included in Outlook 2013, you can bring much of your online experience—at least when it comes to communicating with family, friends, and colleagues—together in one place.

Even with all of its many features, Outlook is easy to use. It provides simple forms for creating and viewing messages, meetings, tasks, and other items. You can choose among several options for viewing your information in Outlook, and you can customize the existing views and create new ones. With this book in hand, you can be up to speed with Outlook in just a few hours.

This section of the book offers a quick overview of Outlook and how to start using it. You learn how to work with Outlook folders and items (such as messages, meetings, and contacts), add email accounts, and get help when you need more information about a particular feature or task.

In this section:

- Outlook 2013 at a glance
- Starting and exiting Outlook
- Exploring Outlook folders
- Working with Outlook items
- Setting up email accounts
- Viewing items and folders
- Getting help in Outlook 2013

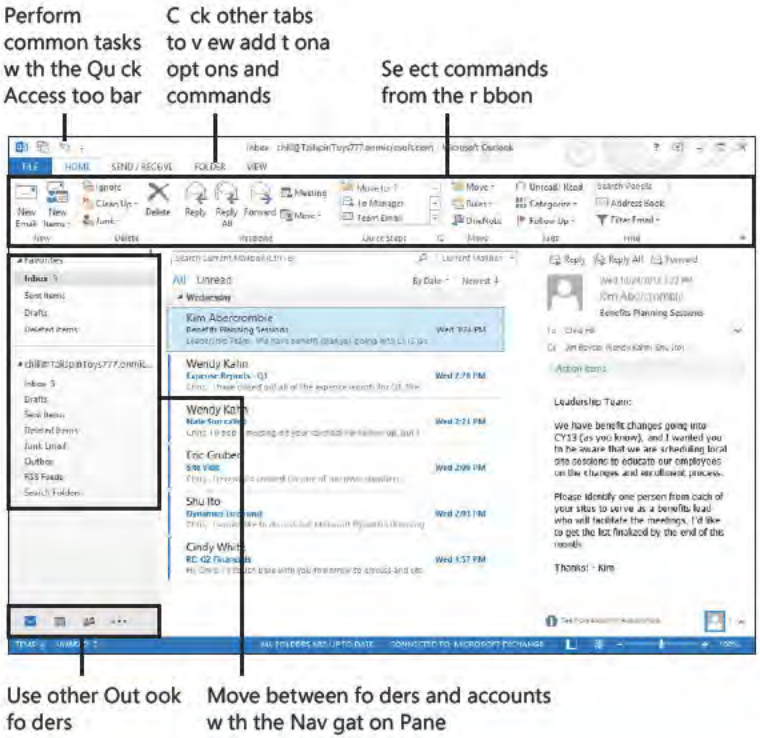
www.it-ebooks.info

Outlook 2013 at a glance

At first, the Outlook app window can seem overwhelming to new users because it contains so much information. However, after you understand how Outlook organizes and presents that information, you will have no trouble moving from folder to folder to view and arrange your information. The main program window organizes all of your Outlook folders for easy access, and individual windows help you to work with the different types of Outlook items.

Overview of the Outlook program window

Outlook provides several folders and ways to view the contents of those folders. The default view is the Inbox view, which shows email messages that you have received.



TIP If you need more space to display your schedule or other data, you can collapse the Folder pane or hide it altogether. Click the collapsed Folder pane or click the ellipsis button (...) at the bottom of the Folder pane to open a different Outlook folder.

SEE ALSO The Inbox is the default view in Outlook, but you can choose a different view as your default. See "Set the startup view" on page 33 for details.

www.it-ebooks.info

Overview of an Outlook item window

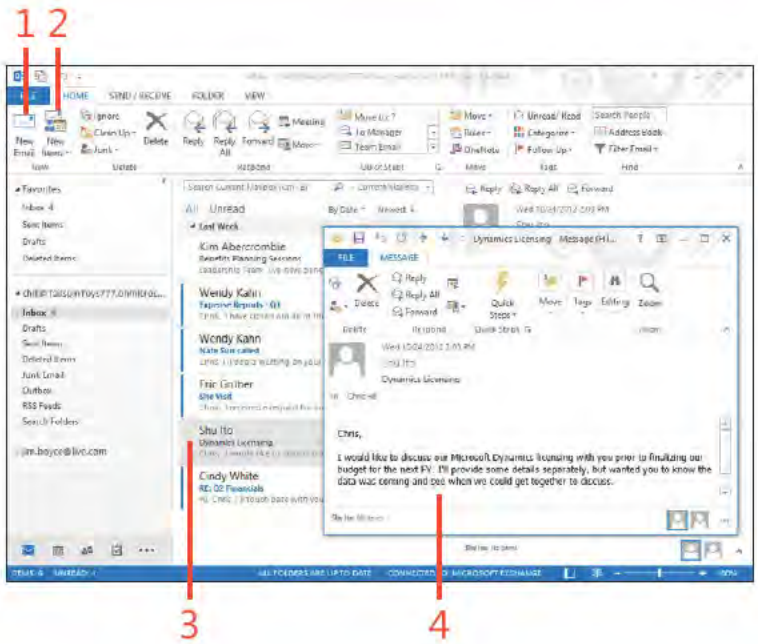
Each Outlook folder uses a different type of form to let you view, create, and work with items. Simply double-click an item to open its form, or click the small arrow beside the New Items command on the Home tab on the ribbon and choose the type of item that you want to create.

1 C ck the New Ema button to create a new tem of the defau t type for the current fo der

2 C ck the New Items button to se ect the type of tem that you want to create

3 Doub e-c ck an tem to open the tem for v ew ng and ed t ng

4 V ew the opened tem



SEE ALSO For information about customizing the way folder icons appear in the Folder pane, see "Customizing the Folder pane" on page 253.

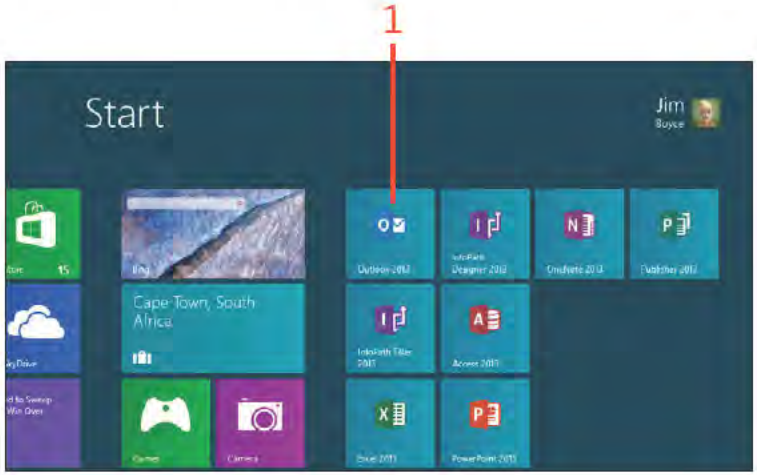
www.it-ebooks.info

Starting and exiting Outlook

Before you can work with your Outlook items, you need to open Outlook. The app functions in much the same way as other traditional desktop Windows programs when it comes to starting, using, or exiting the program.

Start Outlook

1 On the W ndows 8 Start screen, c ck the Out ook 2013 app t e



TRY THIS! Right-click or slide down on the Outlook 2013 app tile on the Start screen. Then, click Pin To Taskbar to pin Outlook 2013 to the Windows taskbar.

Exit Outlook

1 On the r bbon, c ck the F e tab to d sp ay the Backstage v ew and then c ck the Ex t tab

2 As an a ternat ve to step 1, c ck the C ose button

TIP You can press Alt+F4 to close whichever program is currently active.

www.it-ebooks.info

Exploring Outlook folders

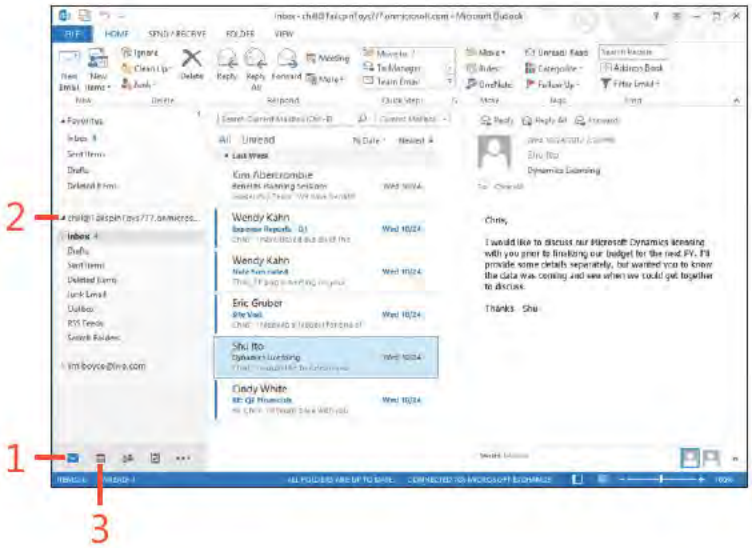
Outlook includes several folders that contain different types of data. The Inbox receives incoming messages, and outgoing messages depart through the Outbox. The Drafts folder holds messages that you're working on, and the Sent Items folder keeps a copy of each message you send. You can use the People Hub to store contact information and the Calendar folder to store your schedule. The Navigation pane and the folder list give you quick access to your folders.

Using the folder pane

1 C ck Ma to open the Inbox fo der

2 C ck the root of your defau t ema account to open the Out ook Today v ew

3 C ck other cons to open tems not shown n the Fo der pane



TIP If you work with Outlook much of the day or every time you work on your computer, pin Outlook 2013 and your other most frequently used Office apps to the taskbar.

TIP You can use more than one set of personal folders at a time, and Outlook shows them all in the folder list. For example, if you have a Windows Live account as well as an Exchange account, you see both sets of folders in the Folder pane.

www.it-ebooks.info

Use the folder list

1 C ck the e ps s button

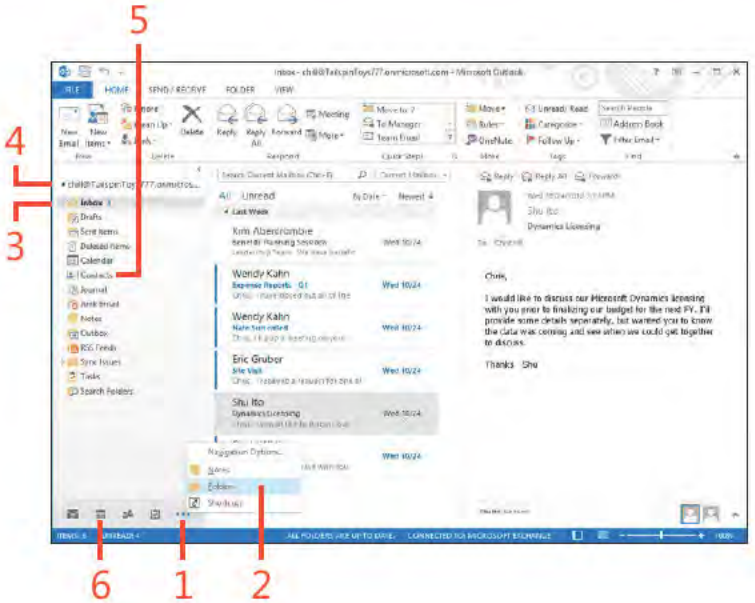
2 C ck Fo ders

3 C ck a wh te tr ang e to expand a fo der's st ng

4 C ck a b ack tr ang e to co apse a fo der's st ng

5 C ck a fo der to open t n Out ook

6 C ck a d fferent con to d sp ay that fo der's contents



TIP Unlike previous versions of Outlook, Outlook 2013 displays menu choices in text. This change makes the program interface well-suited to Windows 8. However, you might want to switch back to icons to save space.

SEE ALSO For information about setting up email accounts for Windows Live and other email services, see "Setting up email accounts" on page 27.

www.it-ebooks.info

Working with Outlook items

Outlook helps you to store information and send messages in a variety of ways. You can use messages, contacts, journal entries, tasks, appointments, meetings, and notes, each of which constitutes a type of Outlook item. Outlook stores each type in a particular folder and presents the information in a way that makes the most sense for that type of data. In many situations, you can retrieve the information you need simply by opening the folder without actually opening the item.

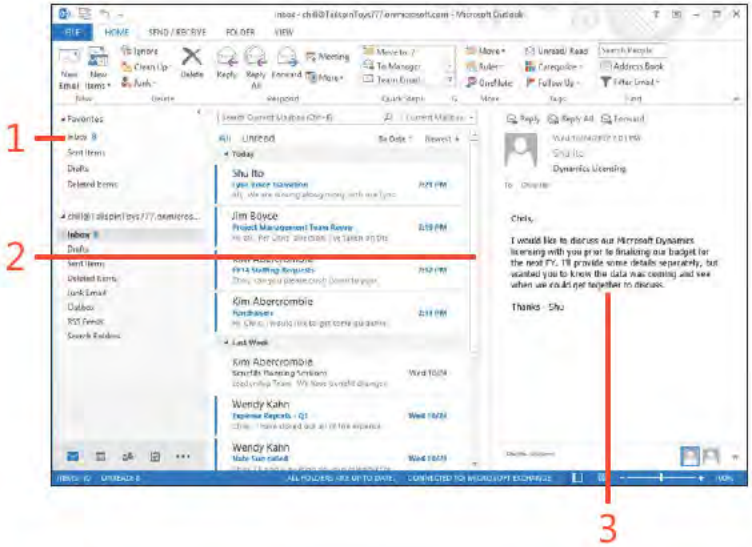
Review items in a folder

1 In the Fo der pane, c ck the fo der whose contents you want to v ew

2 Use the scro bar to v ew add t ona tems

3 V ew the tem n the Read ng pane

4 In the Peop e Hub, c ck the etter that corresponds to the f rst n t a of other names that you want to v ew



TIP The Reading pane appears below or to the right of the Contents pane and displays the contents of an item when you click it. To find the Reading pane, choose Reading Pane on the View tab.

TIP Outlook provides a Message Preview option for list views such as the default Inbox and Tasks folder views. When Message Preview is turned on, Outlook displays the first few lines of the item below the item's header. To turn Message Preview on or off, choose Message Preview on the View tab.

www.it-ebooks.info

Open an item

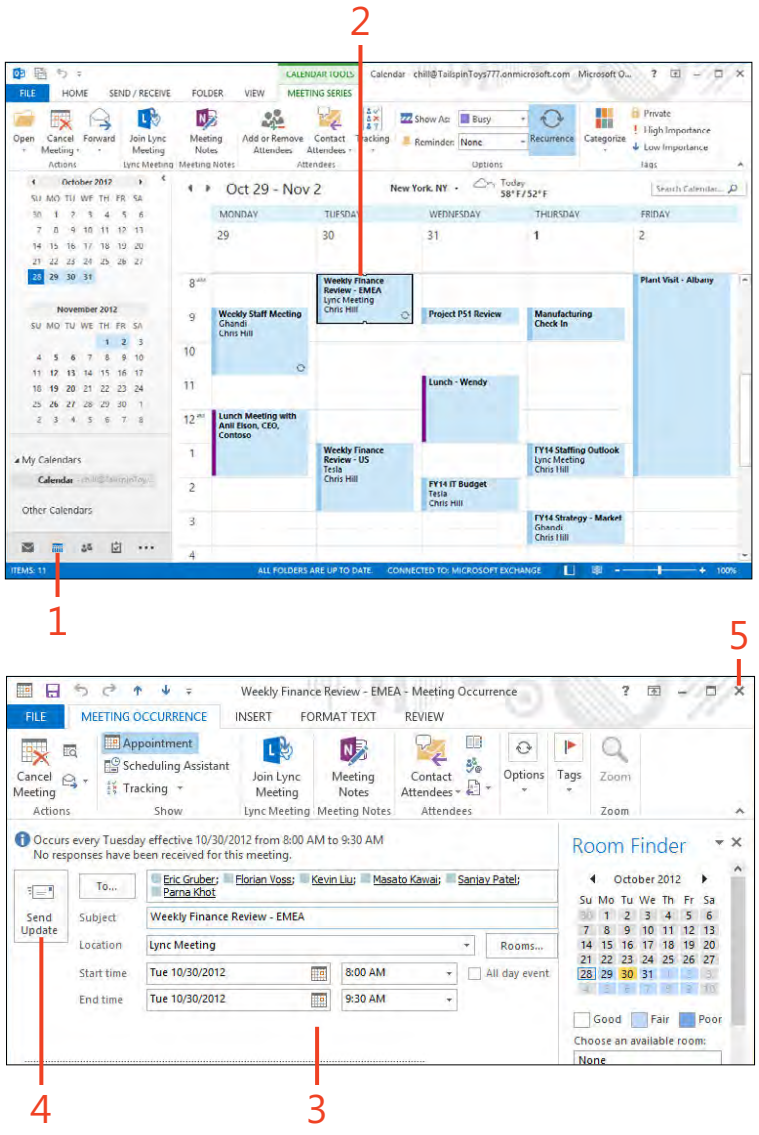
1 In the Fo der pane, c ck the fo der that conta ns the tem you want to open

2 Locate the tem n the Contents pane and doub e-c ck t

3 V ew the tem n ts current form or make changes as necessary

4 For a meet ng, c ck Send Update to save the changes and send an updated nv tat on For other types of tems, c ck the Save & C ose button to save your changes to the tem and c ose the form

5 As an a ternat ve to step 4, c ck C ose to c ose the form w thout mak ng changes



www.it-ebooks.info

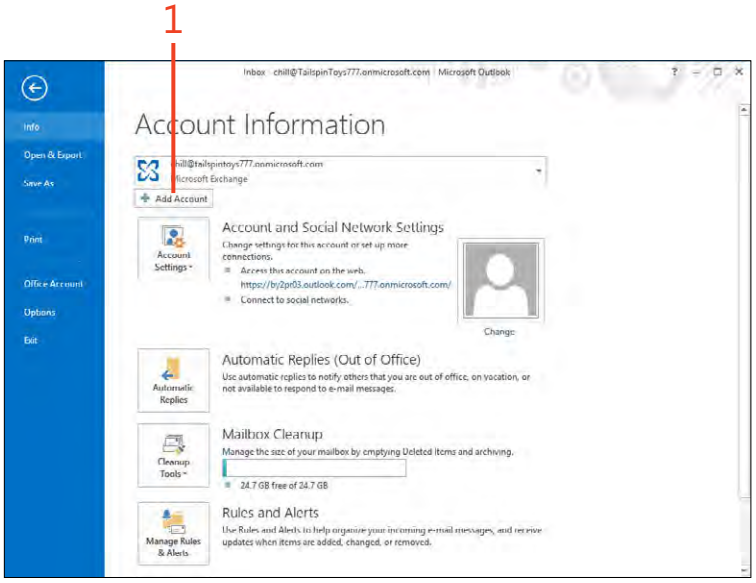
Setting up email accounts

You can use Outlook to send and receive messages for several different types of email accounts. Outlook supports Microsoft Exchange Server; POP3 services, such as a typical account from an Internet service provider (ISP); IMAP services; and Exchange ActiveSync compatible accounts such as Outlook.com accounts. You can easily add a new account, either automatically by using AutoDiscover or by manually entering the settings for the account. However, unlike previous versions of Outlook, you can't import email accounts from other programs into Outlook 2013. Instead, you must add them in the same way that you add a new email account.

Add an email account by using AutoDiscover

1 On the r bbon, c ck the F e tab to d sp ay the Backstage v ew and then c ck Add Account

(continued on next page)



www.it-ebooks.info

Add an email account by using AutoDiscover *(continued)*

2 Type your f rst and ast name

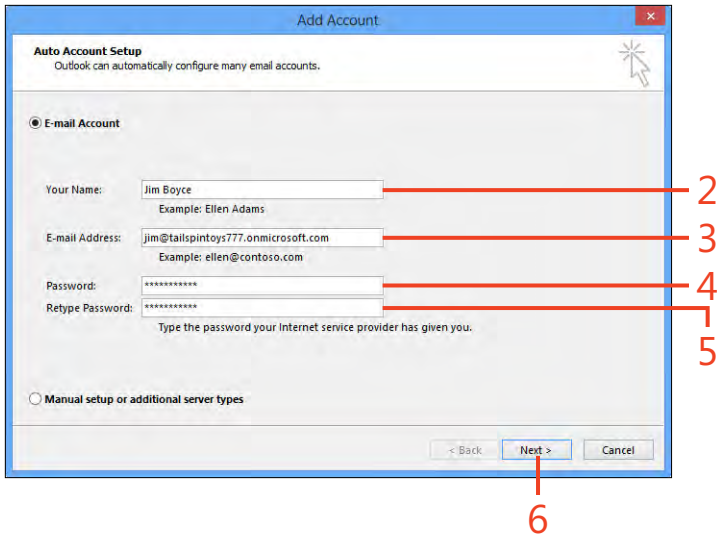
3 Type the ema address for your ema account

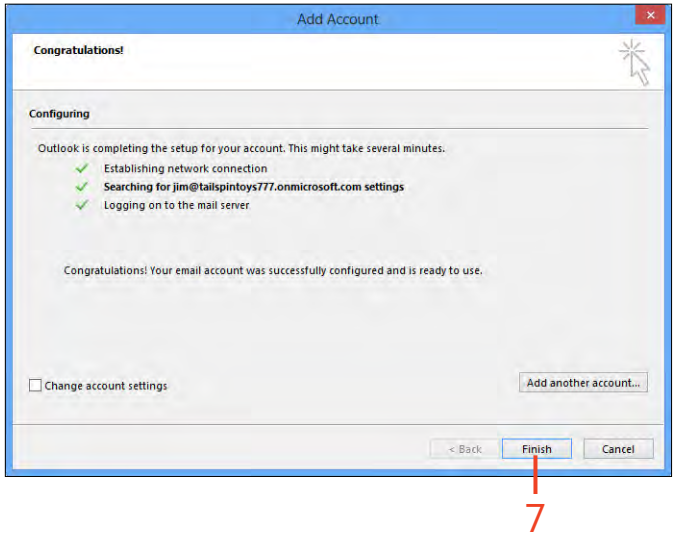
4 Type your ema account password

5 Type your ema account password aga n

6 C ck Next

7 C ck F n sh





www.it-ebooks.info

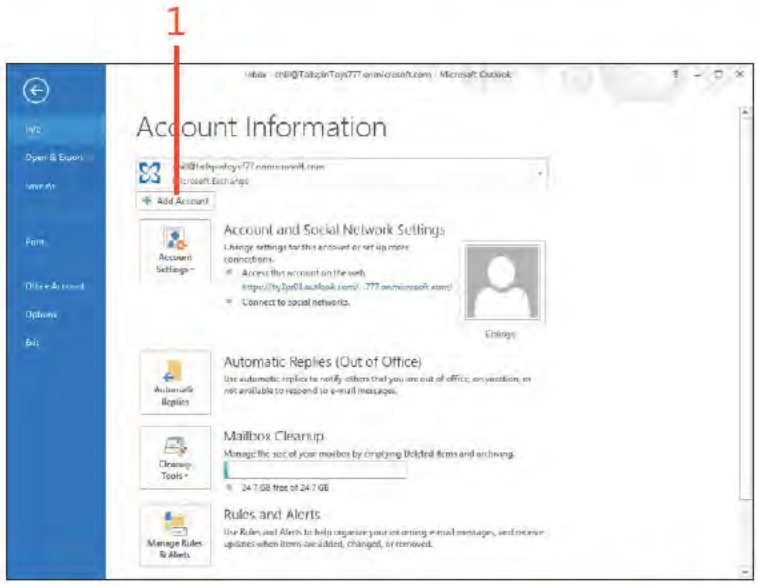
Add a POP or IMAP email account manually

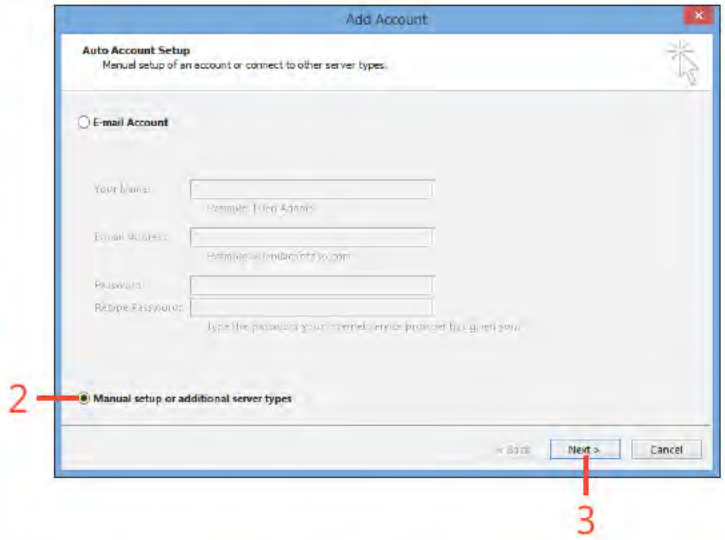
1 On the r bbon, c ck the F e tab to d sp ay the Backstage v ew and then c ck Add Account

2 C ck Manua Setup Or Add t ona Server Types

3 C ck Next

(continued on next page)





TIP You can manage Outlook email accounts, personal folders, address books, RSS feeds, SharePoint lists, and directory services through the Mail icon in Windows Control Panel.

TRY THIS! Outlook can often add email accounts automatically. In the Add New Account dialog box, fill in your name, email address, and password, and then click Next. Outlook attempts to identify the mail server based on your email address and performs some tests to verify that it can send and receive using the specified server. If Outlook can't determine the right settings, it prompts you to enter them manually.

www.it-ebooks.info

Add a POP or IMAP email account manually *(continued)*

4 Se ect POP Or IMAP

5 C ck Next

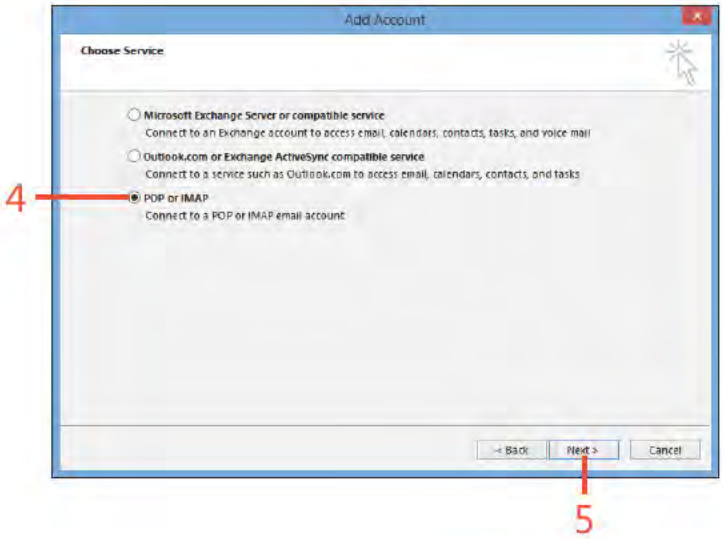
6 Type your name and ema address

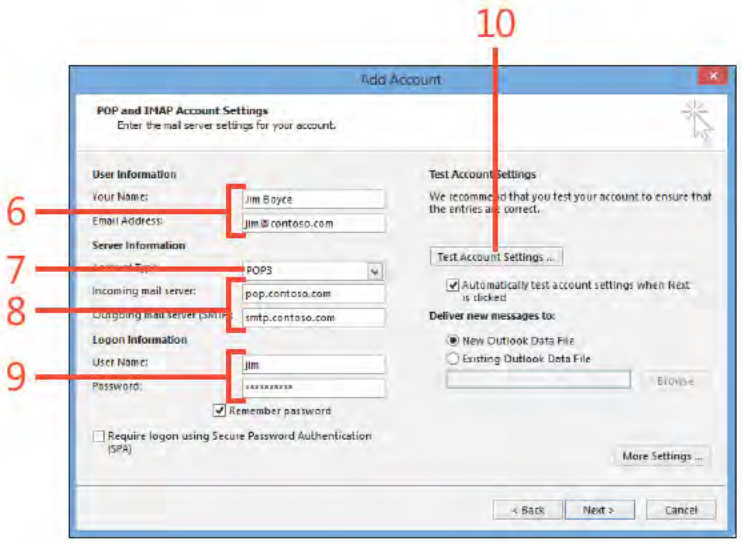
7 Choose the account type

8 Type the ncom ng and outgo ng ma server names prov ded by your ISP or ema adm n strators

9 Type your user name and password for the server account you're test ng

10 C ck Test Account Sett ngs to have Out ook test your sett ngs, and then c ose the test w ndow when the test s comp eted successfu y C ck Next, and then c ck F n sh to return to the Account Sett ngs w ndow





SEE ALSO For information about keeping messages from different accounts separated from one another, see "Working with the Rules Wizard" on page 81.

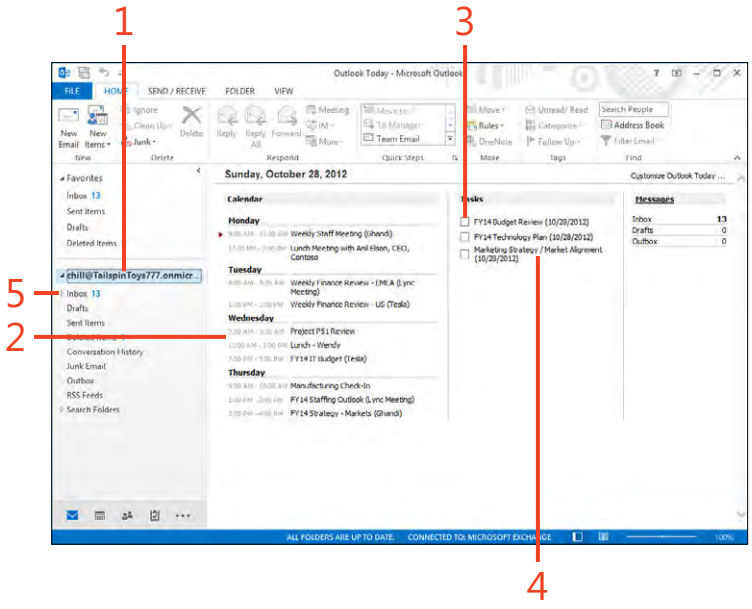
www.it-ebooks.info

Viewing items and folders

Outlook offers several different views, depending on the folder you open. You can use the default views to work with the data in the folder or change the view to tailor it to your needs. The Outlook Today view gives you a single place to view your pending appointments, tasks, and messages, giving you a summary of your workday or workweek. You can also use the View tab to switch easily among the available views for a particular Outlook folder.

Use the Outlook Today view

1. In Out ook, n the Fo der pane, c ck the ema address for the account w th wh ch you want to work
2. To open an appo ntment, n the Ca endar st, c ck the appo ntment
3. Se ect the check box bes de a task to mark t as comp ete
4. C ck a task to open the task
5. C ck the Inbox or other fo der to open the fo der and work w th your messages



www.it-ebooks.info

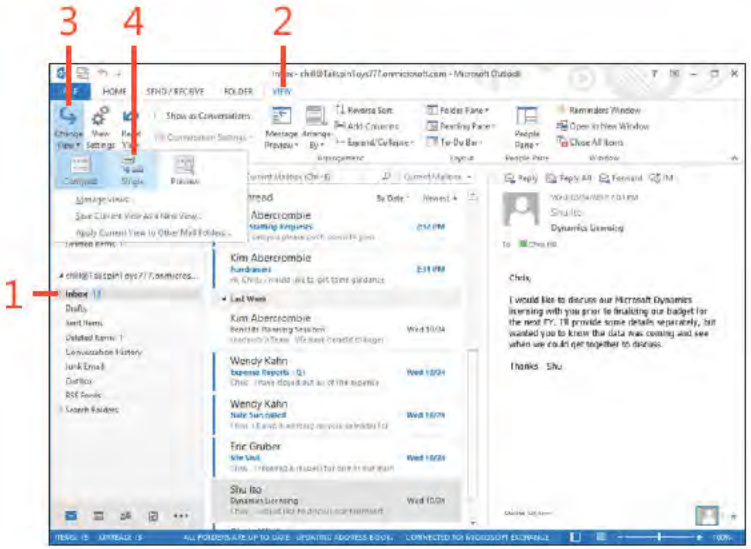
Use the Change View menu

1 In Out ook, se ect the fo der that you want to v ew

2 On the r bbon, c ck the V ew tab

3 C ck the Change V ew button

4 In the ga ery that opens, choose a v ew



TRY THIS! Open the People Hub and click New Contact in the ribbon to create a new contact. Fill in the fields on the Contact page and click Save & Close to save the contact. With the People Hub open, click the View tab, click Change View, and then select Card. Outlook displays more information in the Contacts folder. Click Change View and then select Phone to change to a view that is handy for quickly locating phone numbers.

www.it-ebooks.info

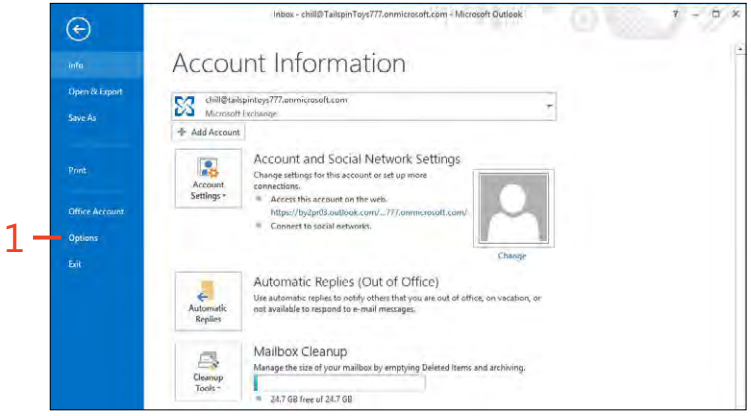
Set the startup view

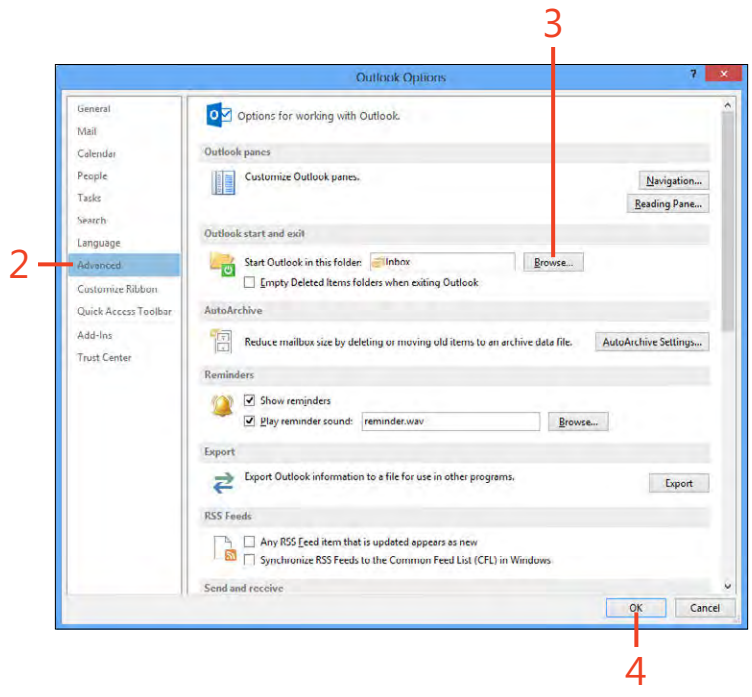
1 In Out ook, c ck the F e tab to d sp ay the Backstage v ew and then c ck the Opt ons tab

2 C ck Advanced to show the Advanced page n the Out ook Opt ons d a og box

3 C ck Browse, and choose the fo der that you want Out ook to d s- p ay when you f rst start the program

4 C ck OK to c ose the Opt ons d a og box





www.it-ebooks.info

Getting help in Outlook 2013

Every new program has a learning curve. Getting up to speed with Outlook can take some time because of the number of features it offers. Even after you become comfortable using Outlook every day, you're likely to need some help with features you've never used before or those you seldom use. Outlook provides extensive Help documentation, and you can access this information in a couple of ways.

Use Outlook Help content

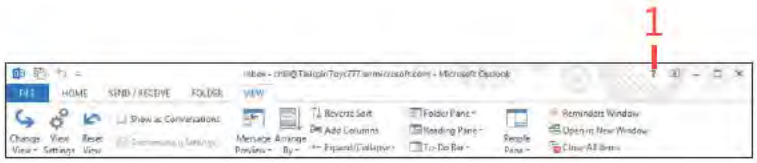
1 C ck the Quest on Mark button above the r bbon

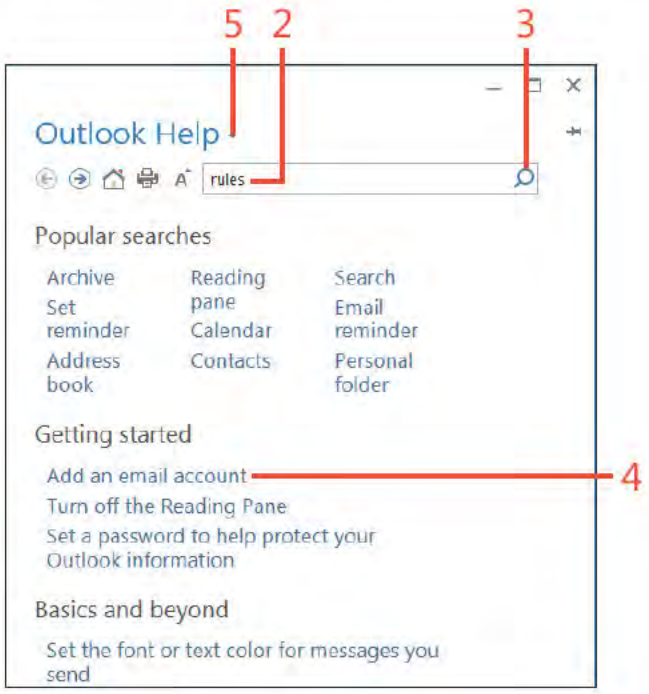
2 In the Out ook He p w ndow, c ck n the text box and type a word or phrase

3 C ck to search for the spec f ed top c A ternat ve y, use e ther of the fo ow ng steps

4 C ck a top c head ng to v ew the assoc ated top c

5 C ck to choose between on ne and off ne He p content





TIP Offline Help consists of Help content installed by the Setup program and stored on your computer. Online Help is content available on the Internet at the Microsoft website. Offline Help is great when you don't want or can't connect to the Internet. Online Help is generally more extensive.

www.it-ebooks.info

Writing and sending email

4

Microsoft Outlook 2013 handles many daily tasks for you, such as keeping your calendar, collecting notes, and saving your contacts. But the main feature of Outlook is its electronic mail (email). Outlook is often referred to as a universal inbox—it can send, receive, and store messages from a number of different email sources, such as Exchange Server, Outlook.com, Windows Live, and other Internet email accounts.

The email features in Outlook make it possible for you to create and send email messages to others. With the help of the People Hub and Address Book, you can quickly access a recipient's email address when you're ready to address your new email message. You can also use contact groups in Outlook to send one message to multiple users, format email message text to contain rich content (such as HTML format) and to use HTML stationery, and to append signatures at the bottom of all your outgoing messages.

In this section, you learn how to write and modify email messages, send messages, and review messages you've already sent. In addition, you learn how to use the Address Book to select recipient names, create and use contact groups, format your messages, use signatures, send attached files, and work with HTML stationery.

In this section:

- Writing an email message
- Working with the Address Book
- Working with contact groups
- Changing message text
- Formatting message text
- Using signatures
- Working with HTML stationery
- Sending a file by email
- Sending messages manually
- Reviewing sent messages and drafts

www.it-ebooks.info

Writing an email message

When you write new messages in Outlook 2013, you use the Message window. This window has a line for recipients (called the To line), a line for "carbon copied" recipients (the Cc line), a Subject line, and an area for the text of the message. Every new message must have at least one recipient. If you want, you can leave the Cc and Subject lines blank, but it's a good idea to give your messages a subject.

Address an email message

1 On the Home tab, in the New group, click New Email to display a new Message window

2 To open the Select Names dialog box, click To

3 In the Select Names dialog box, click the Address Book drop-down arrow

4 Click the name of the address book you want to use, such as Contacts

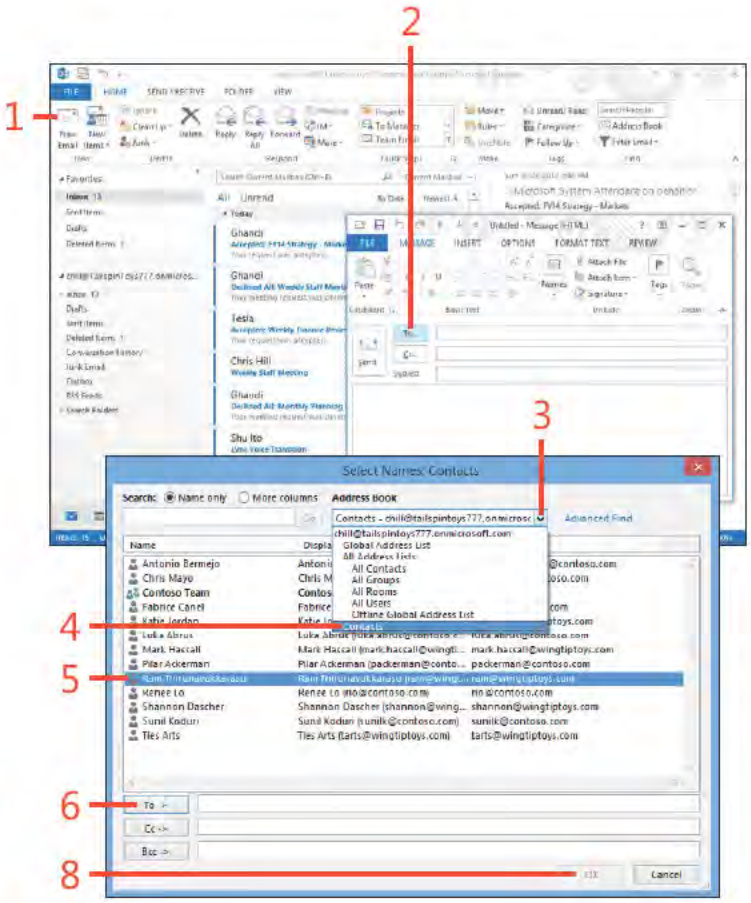
The addresses in the selected address book appear in the box

5 Click the name of the person to whom you want to send the new message

6 Click To, Cc, or Bcc; Outlook copies the name to the specified message recipients list

7 Repeat steps 5 and 6 until the message recipients list includes the recipients to whom you want to send the message

8 Click OK



SEE ALSO For information about adding and updating contacts, see "Working with contacts" on page 41.

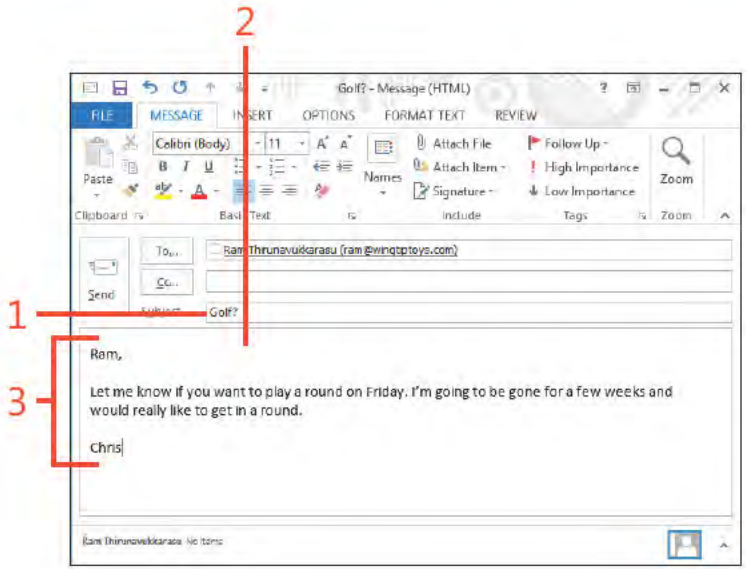
www.it-ebooks.info

Type your message subject and text

1 In the new Message w ndow, n the Subject f e d, type a subject for the new message

2 Press the Tab key, or c ck n the message body area

3 Type your message



TIP As you write your message, you do not have to press Enter at the end of each line. Keep typing, and Outlook wraps the text to the next line. To create a new paragraph, press Enter. If you want each paragraph to be separated by two blank lines, press Enter twice at the end of each paragraph. This makes your messages easier to read than single-spaced messages.

CAUTION You can apply special formatting to your message (see "Formatting message text" on page 47), but you might not want to. If you send mail to people who use a different email program, they might not see the formatting that you intended. When in doubt, it's usually a good policy to keep your messages simple so that nothing gets lost in the translation.

www.it-ebooks.info

Working with the Address Book

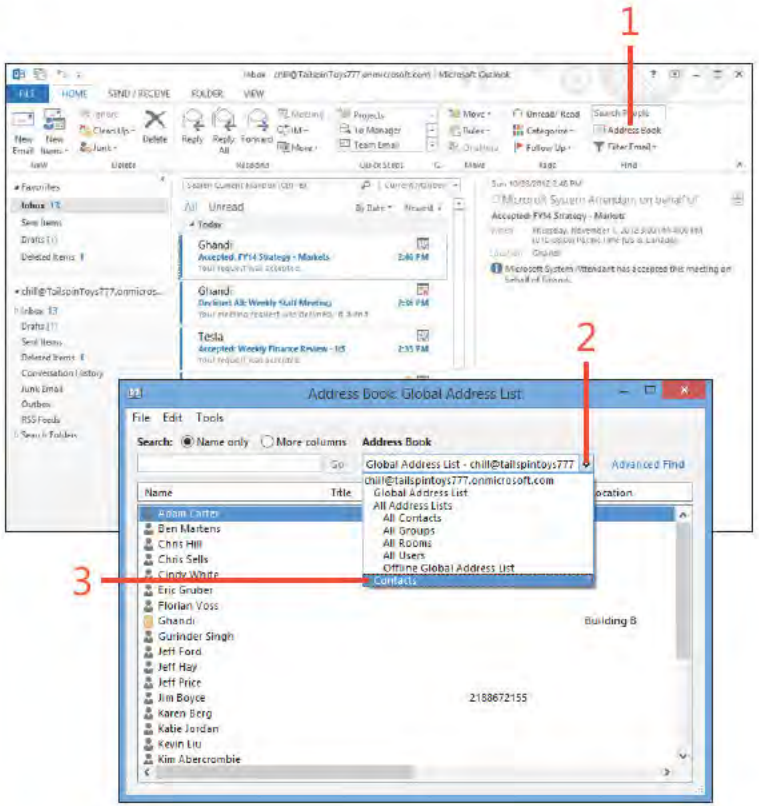
You can use the Outlook 2013 Address Book to search for and select names, email addresses, and contact groups. When you type a recipient name in the To field of the Message window, Outlook searches the Address Book for a match. The Address Book gives you access to any address books that you have set up (see the Tip about address books on page 40), as well as information from the Contacts folder, Microsoft Exchange Server Global Address List (if you have an Exchange Server mailbox), Internet directory services, and address books added by other services such as LinkedIn. Depending on the way you have Outlook set up, you can have information from only one of these sources or you can have contact information from multiple types.

Open the Address Book

1 On the Home tab, in the Find group, click Address Book

2 In the Address Book drop-down list, click the selection arrow

3 Click the address book from which you want to view addresses



SEE ALSO For more information about working with your contact information, see "Working with contacts" on page 41.

TIP You can set up several different address books to store your email recipients' contact information. For example, you might have a company-wide address book that stores addresses and contact information for all internal employees. A second address book can be set up for external contacts, such as vendors, suppliers, and customers. A third address book could store personal contact information.

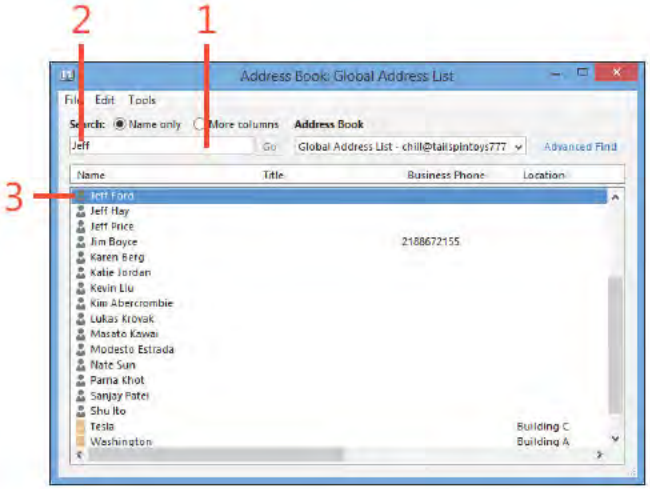
www.it-ebooks.info

Find a name in the Address Book

1 In the Address Book d a og box, c ck n the Search text box

2 Type the name of the contact that you want to f nd

3 The f rst contact that matches the name you typed n the Search text box s h gh ghted n the st of names



TRY THIS! Assume that you want to find a contact whose name is Dave. You're not sure whether you listed him as "Dave" or "David" in your Contacts folder. To find him, in your Address Book choose Find from the Tools menu, type **dav**, and then press Enter. Outlook displays all names containing "dav", such as "Dave," "Davey," "David," and so on.

TIP If you want to redisplay your entire address book after a search, select an address book from the Address Book drop-down list and click Name Only. Notice that Outlook now lists search results as a selection in case you want to return to your latest search results.

www.it-ebooks.info

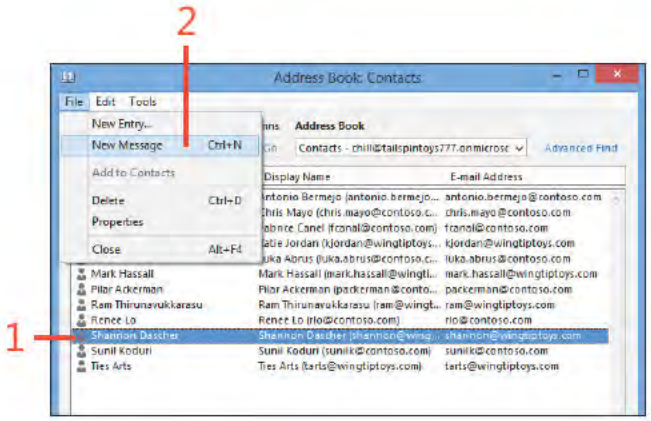
Send an email to a name in the Address Book

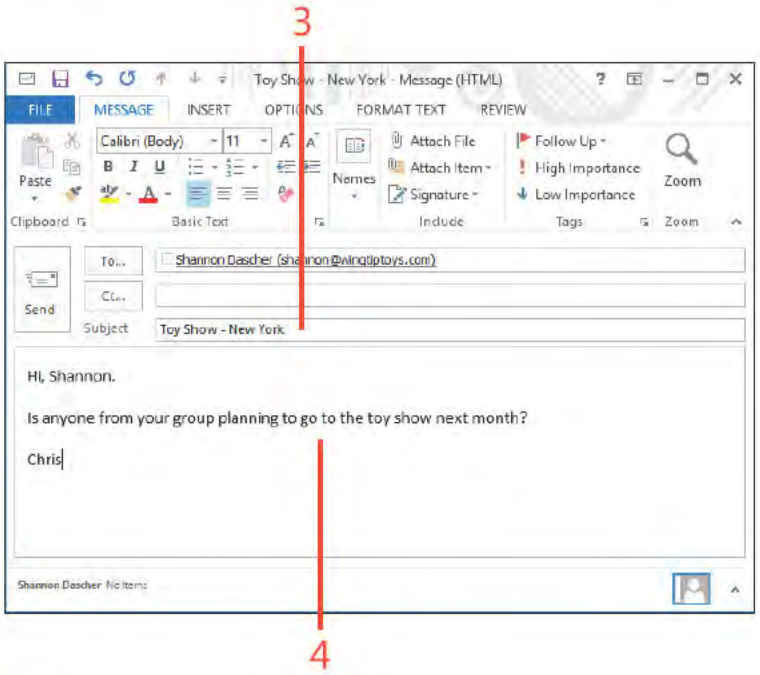
1 In the Address Book d a og box, c ck a contact to whom you want to send an ema message

2 On the F e menu, c ck New Message

3 Type a subject

4 Type your message text n the message body area





TIP When you finish with the Address Book, close it by choosing Close from the File menu.

TIP If your installation of Outlook is not set up for other address books, such as an Exchange Server Global Address List, the only address book that you can select from the drop-down list is the Outlook Contacts folder, which appears as "Contacts" under your email account. Note that the Outlook Address Book collects together all address books, but is not an address book itself in the sense that it stores addresses. Instead, it shows addresses from multiple address books.

www.it-ebooks.info

Working with contact groups

A contact group is a group of contacts that are related in some way. For example, you could create a contact group that includes contacts working on the same project. Then, when you need to send messages to the entire project team, simply select the contact group for that project; Outlook 2013 sends the message to all the contacts in the group. Contact groups are stored in the Contacts folder (People Hub) by default. Contact groups are also referred to as distribution lists.

Create a contact group

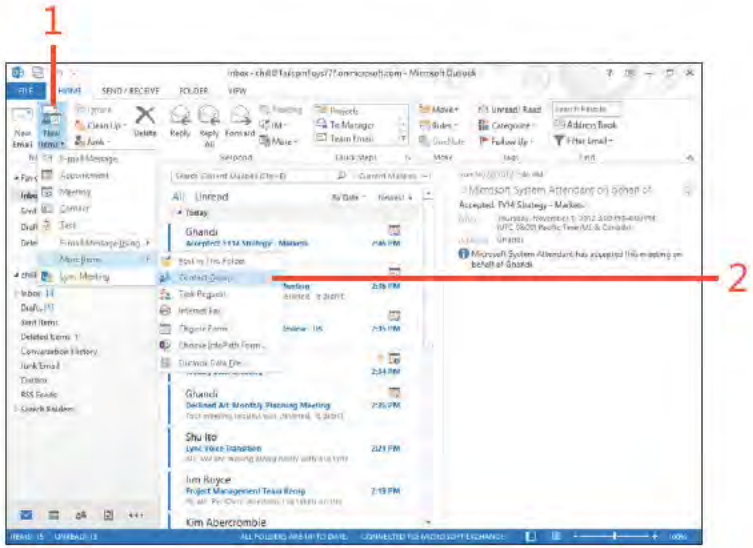
1 On the Home tab, in the new group, click the New Items button

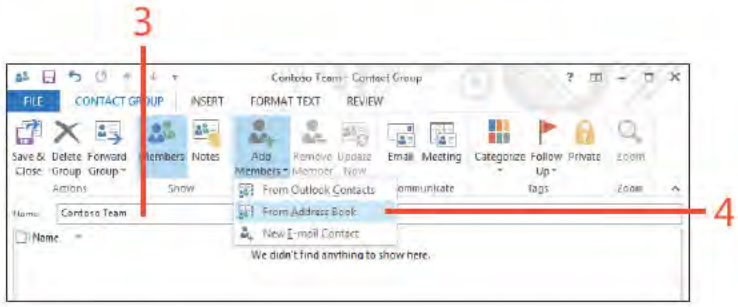
2 Click More Items and then, on the submenu that appears, click Contact Group

3 Click in the Name field and type a name for the new contact group

4 On the ribbon, click Add Members and then, in the drop-down list that appears, choose From Address Book to open the Select Members dialog box

(continued on next page)





TIP You can share a contact group with other users. To do so, open a new message and click Attach Item, and choose Outlook Item from the Include group on the Message tab of the ribbon. In the Look In list, select the folder, such as Contacts, that includes your distribution list. In the Items list, select the distribution list you want to send. Click OK to attach the list to your new message.

www.it-ebooks.info

Create a contact group *(continued)*

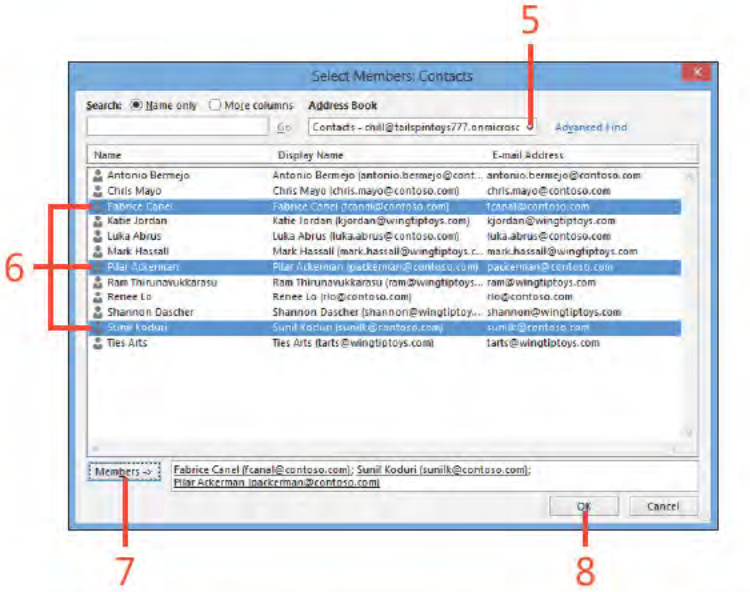
5 From the Address Book drop-down st, se ect the address book that conta ns the names you want to add to the d str but on st

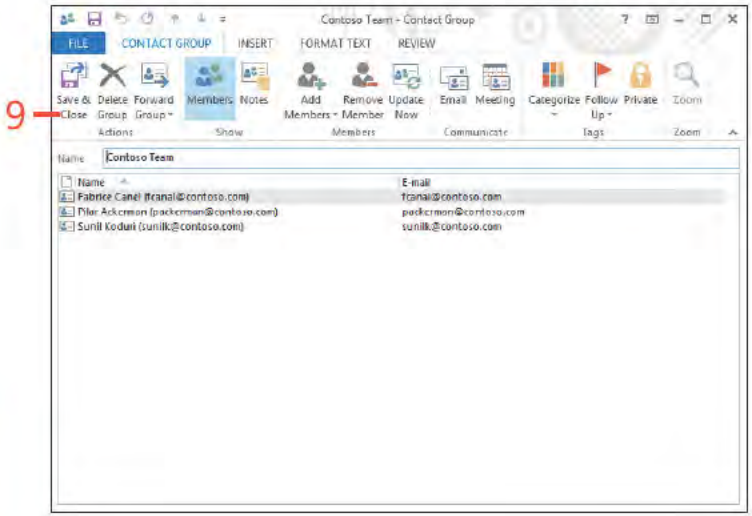
6 Choose one or more names from the st that appears n the Name f e d

7 C ck Members to copy the name to the address st text box

8 C ck OK when your st s comp ete

9 On the r bbon, c ck Save & C ose





TIP You can add existing contacts to a contact group, and you can also add other addresses for recipients who are not among your existing contacts.

www.it-ebooks.info

Use a contact group

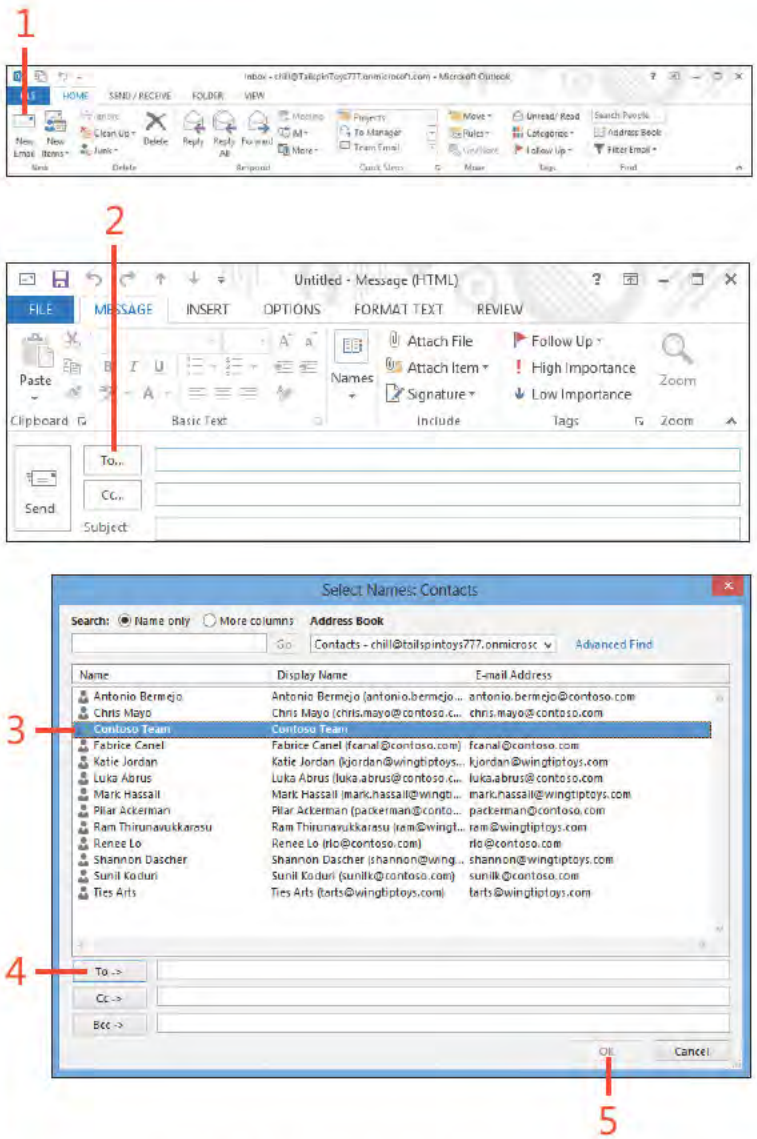
1 On the Home tab, n the New group, c ck New Ema to start a new ema message

2 C ck To

3 From the Name st, c ck the contact group that you want to use to address your ema message

4 C ck To

5 C ck OK



CAUTION When you use a contact group, everyone on the list receives the same message. If you want to send a message to only a select few on the list, such as a confidential message that only specific recipients should read, create a new contact group for these recipients or select the recipients individually in the Select Names dialog box.

www.it-ebooks.info

Changing message text

After you create a message in Outlook 2013 and before you send it, you should proofread it for errors or omissions. If you discover a typographical or other error, you can edit it in the same way you would a word-processing document. You can use familiar commands like Copy and Paste or operations like dragging to edit your text.

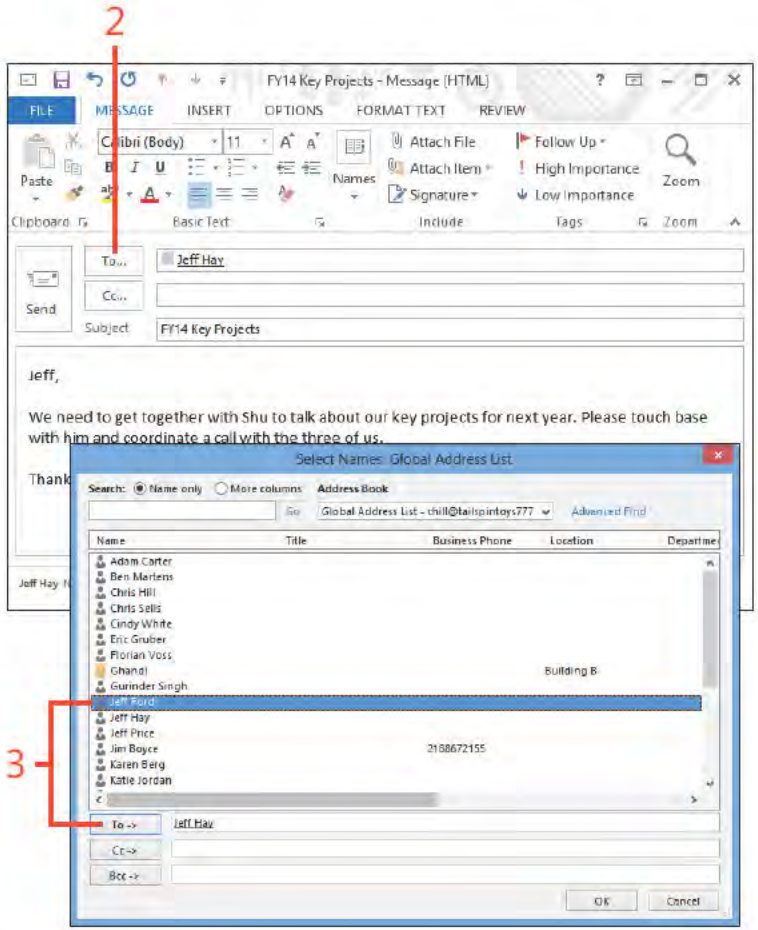
Edit your message

1 Create a new ma message w th rec p ents, a subject, and message text

2 To change the rec p ent, c ck To

3 In the Se ect Names d a og box, c ck a name n the Name st and c ck To, wh ch adds t to the Message Rec p ents st

(continued on next page)



SEE ALSO If you need to modify a contact's information, such as the email address or name, you can do so in the Contacts folder. See "Use the contact form" on page 98.

www.it-ebooks.info

Edit your message *(continued)*

4 C ck a name n the To st and press De ete or Backspace to remove that person from the st

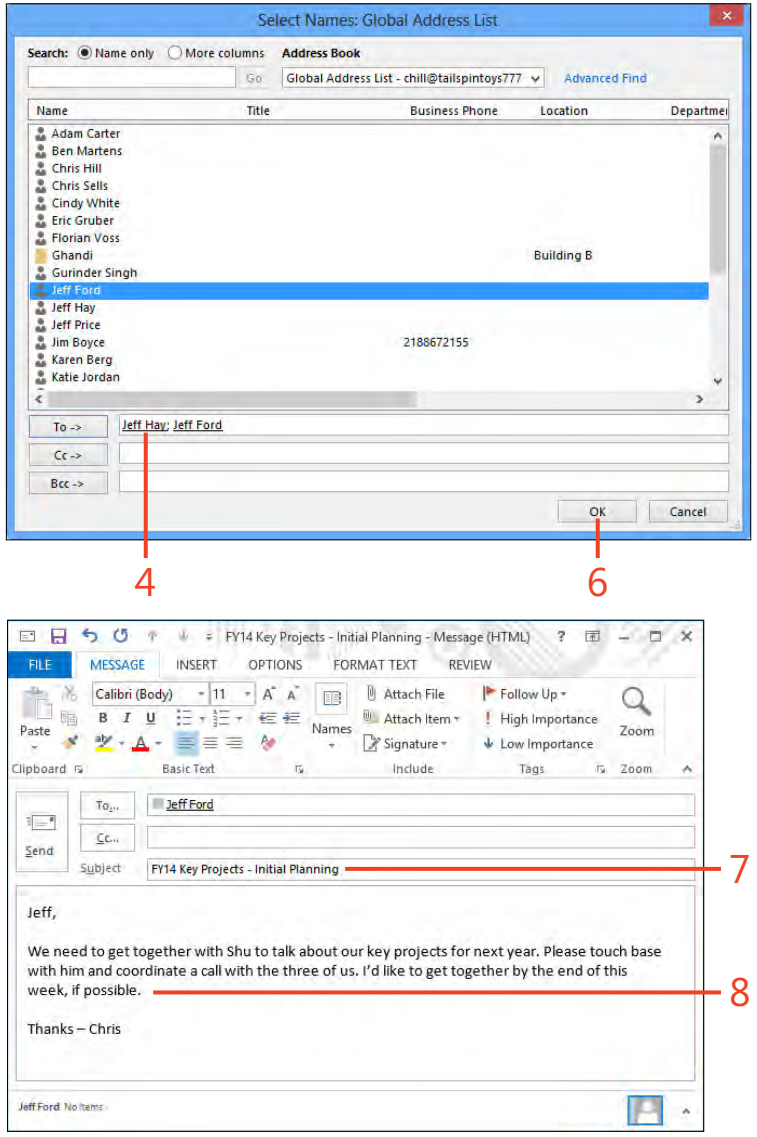
5 Cont nue add ng or de et ng rec p ents unt your rec p ent st nc udes a those to whom you want to send the message

6 C ck OK

7 C ck n the Subject ne where you want to change text

8 C ck n the message body area where you want to change text

9 Add or de ete text as needed



www.it-ebooks.info

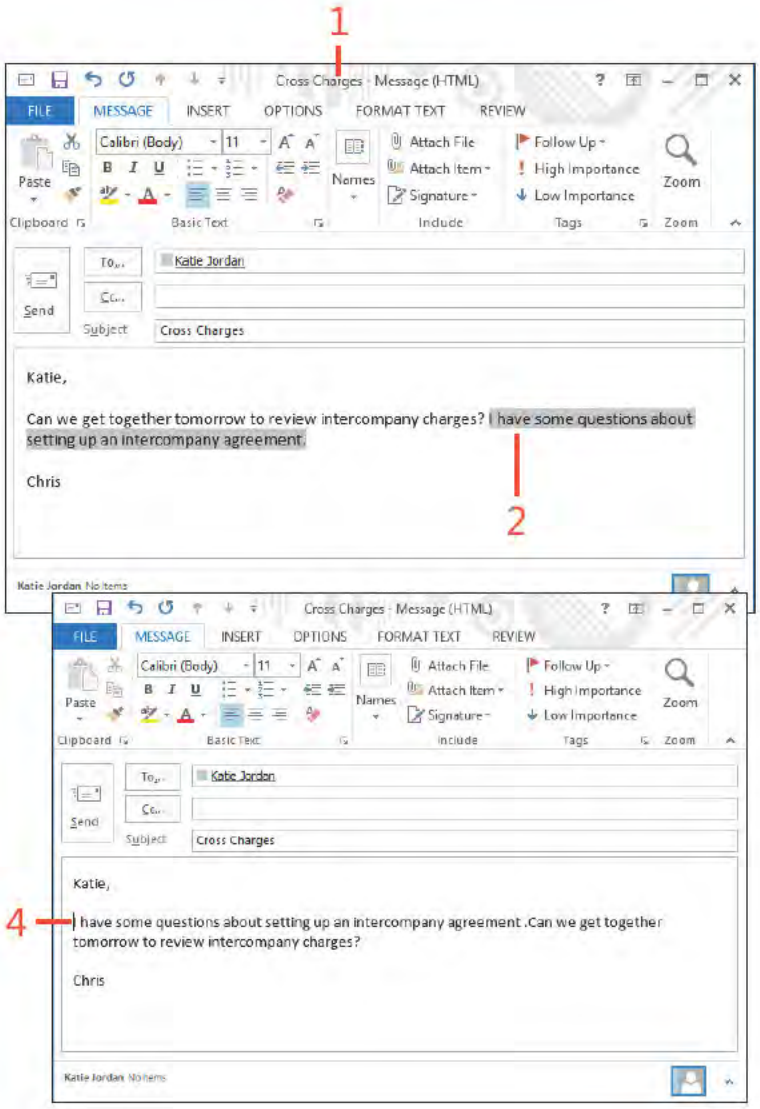
Move and copy message text

1 D sp ay the message conta n ng the text that you want to move or copy

2 Se ect the text that you want to move or copy

3 Drag the text to a new ocat on Or, to copy the text, ho d down the Ctr key as you drag

4 At the new ocat on, re ease the mouse button



TIP Message text can be moved or copied within a message, from one message to another, and between Outlook and other applications. For example, if you have a selection of text that you want to use in several messages, you can select the text and press Ctrl+C to copy the text to the Clipboard. Then, click in the body of each new message and press Ctrl+V to paste the text into each message. You can also use the Copy and Paste buttons on the Message tab on the ribbon to copy and paste text.

TRY THIS! You can drag text from one message to another. Open both messages, and position them so that you can see both windows. Select the text you want to move, and drag it to the desired location in the other message window. Release the mouse button.

www.it-ebooks.info

Formatting message text

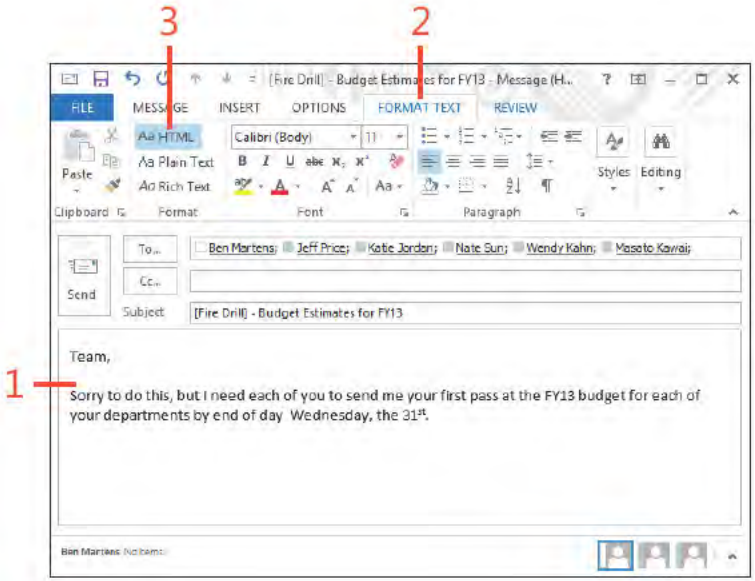
In Outlook 2013, you can format text so that it looks more attractive to you and your recipients. For example, you can apply bold, italic, underline, colors, and other rich formatting to your messages. You also can add HTML formatting to your messages, including tables, hyperlinks, heading levels, and more.

Use a rich text or HTML message format

1 Create a new message, and add some text

2 On the r bbon, c ck the Format Text tab

3 In the Format group, Choose HTML or R ch Text



TIP You can see the presence status (online, offline, away, and so on) in the People pane at the bottom of the new message window.

CAUTION If you add a hyperlink to a message, your recipient needs access to that site or document. For example, if the document you specify in the hyperlink is on the Internet, your recipient must have Internet access. Likewise, if your link is to a document that you have stored locally on your hard drive, your recipient must have share privileges to that document.

www.it-ebooks.info

Add formatting to a message

1 Se ect the text that you want to format

2 On the r bbon, c ck the Format Text tab

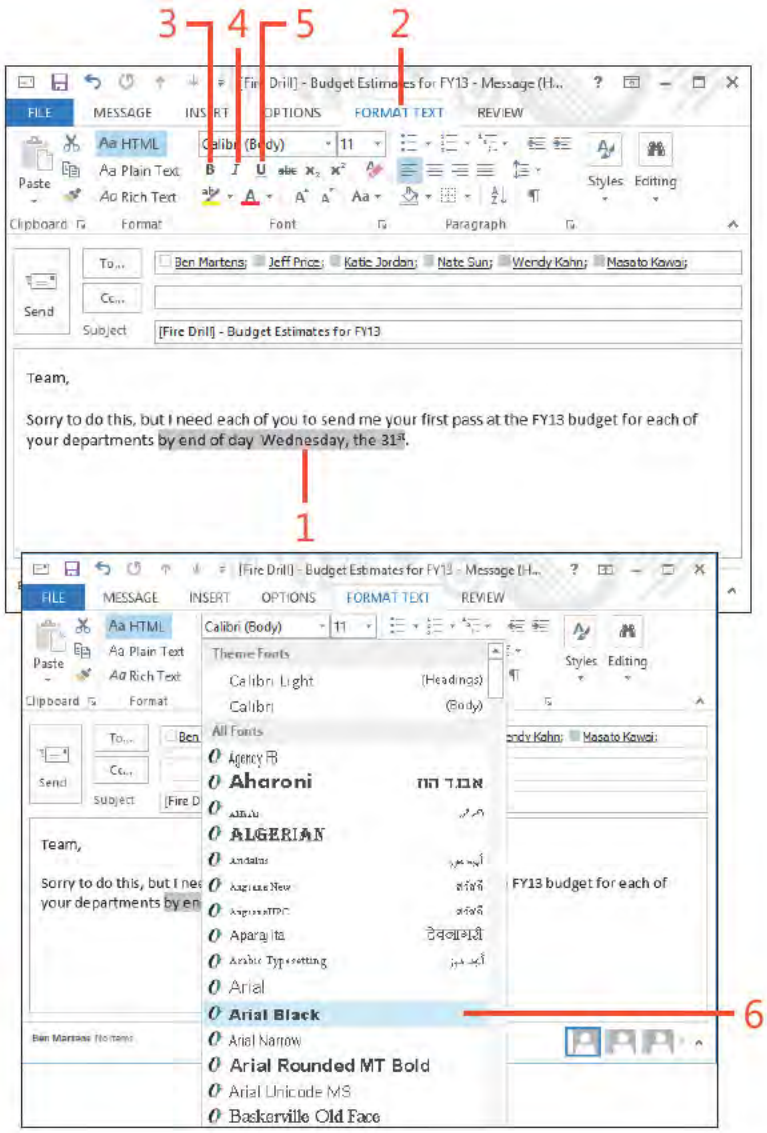
3 In the Font group, c ck Bo d to app y a bo d character sty e to the text

4 C ck Ita c to ta c ze the text

5 C ck Under ne to under ne the text

6 C ck the Font drop-down arrow and then, n the st that appears, se ect a font name to change the text font

(continued on next page)



TIP Some recipients might not be able to handle rich-formatted text. In these cases, the formatted text you see in your message window appears to your recipients as plain text or is converted to unrecognizable characters.

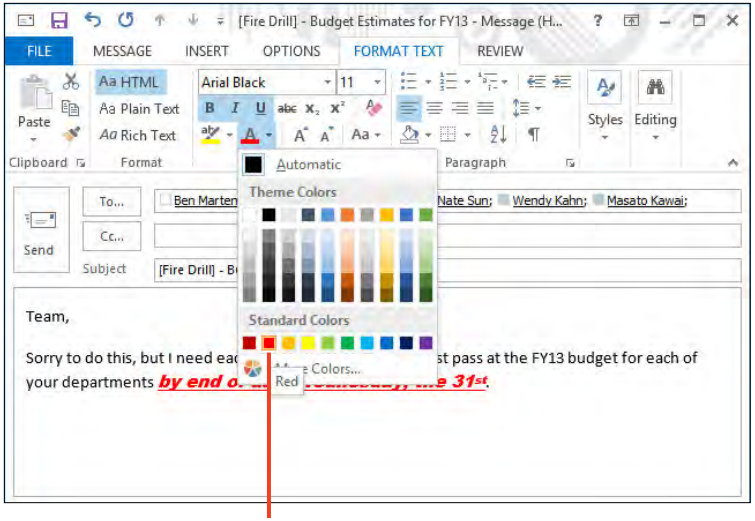
TIP To add a hyperlink to an email message, type the hyperlink in your message; and Outlook converts it to a live link that your recipient can click. For example, you can add a hyperlink to the Microsoft website by typing *www.microsoft.com* in your message.

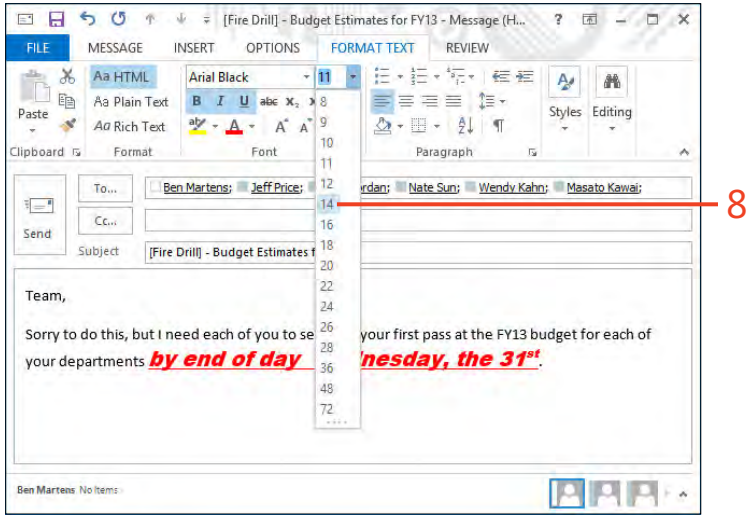
www.it-ebooks.info

Add formatting to a message *(continued)*

7 Se ect a co or from the Font Co or drop-down st to change the text font co or

8 Se ect a va ue from the Font S ze drop-down st to change the text font s ze





www.it-ebooks.info

Using signatures

A signature is boilerplate text or an image that appears to any new messages you compose. The signature is positioned at the bottom of your messages. Many people include phone numbers and other information in their signatures.

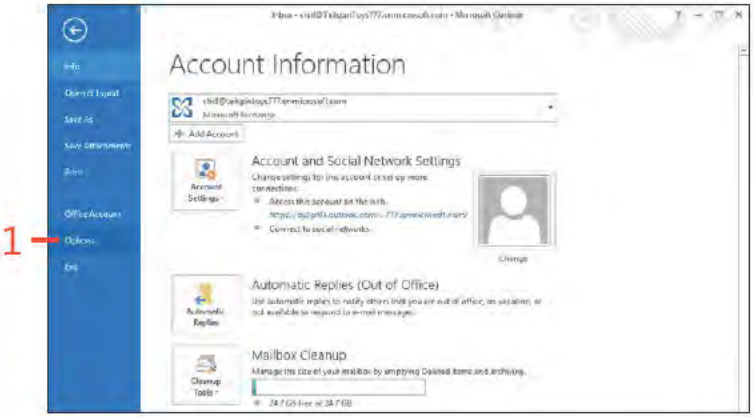
Create a signature

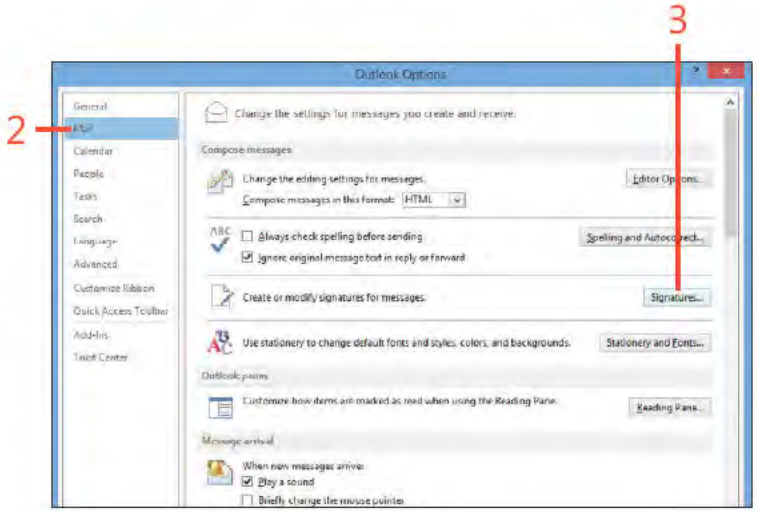
1 On the r bbon, c ck the F e tab to d sp ay the Backstage v ew and then c ck the Opt ons tab

2 In the Out ook Opt ons d a og box, c ck Ma

3 C ck S gnatures to open the S gnatures And Stat onery d a og box

(continued on next page)





TIP Business signatures frequently include the signer's name, title, company name, address, phone number, and email address.

TIP You can create custom signatures for the type of email message you create. For example, you can create a friendly signature for messages intended for family or friends, and a more formal one for business recipients.

www.it-ebooks.info

Create a signature *(continued)*

4 C ck New to open the New S gnature d a og box

5 Type a name for the s gnature and c ck OK

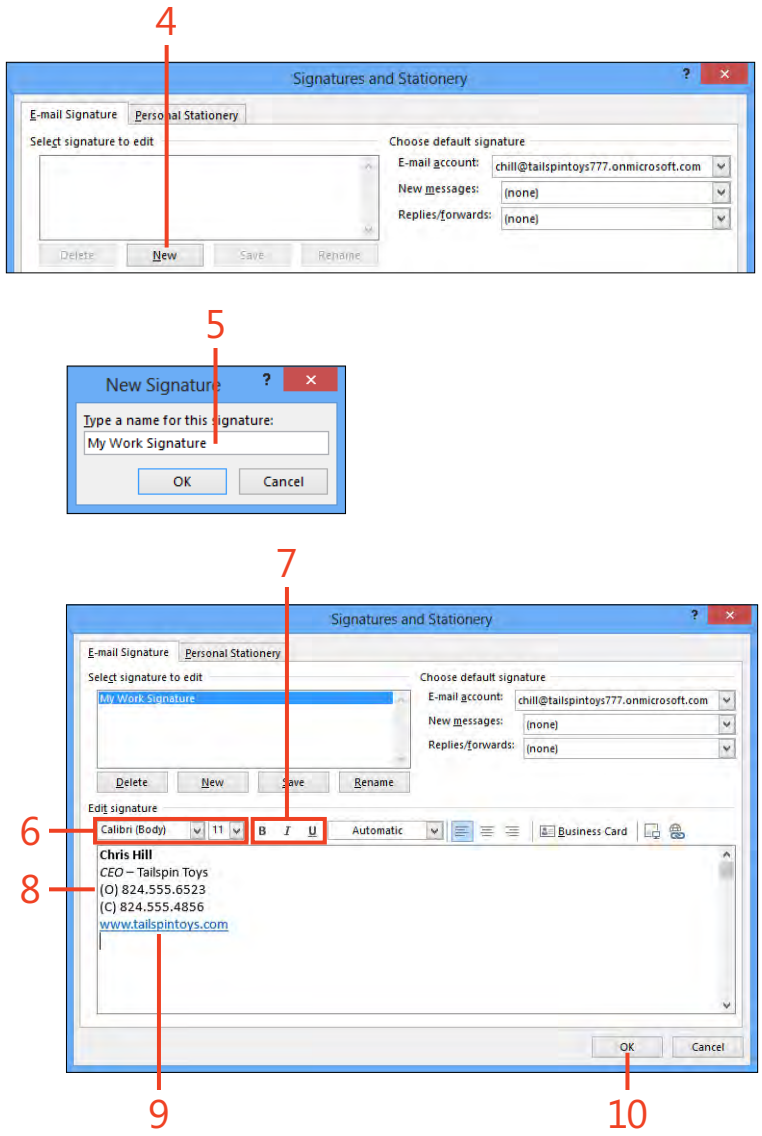
6 Choose a font and font s ze

7 Se ect font format opt ons

8 In the Ed t S gnature f e d, type the text that you want to appear n your s gnature

9 Opt ona y, add p ctures or nks to the s gnature

10 C ck OK to save your s gnature and c ose the S gnatures And Stat onery d a og box C ck OK aga n to c ose the Out ook Opt ons d a og box



www.it-ebooks.info

Associate a signature with an email account

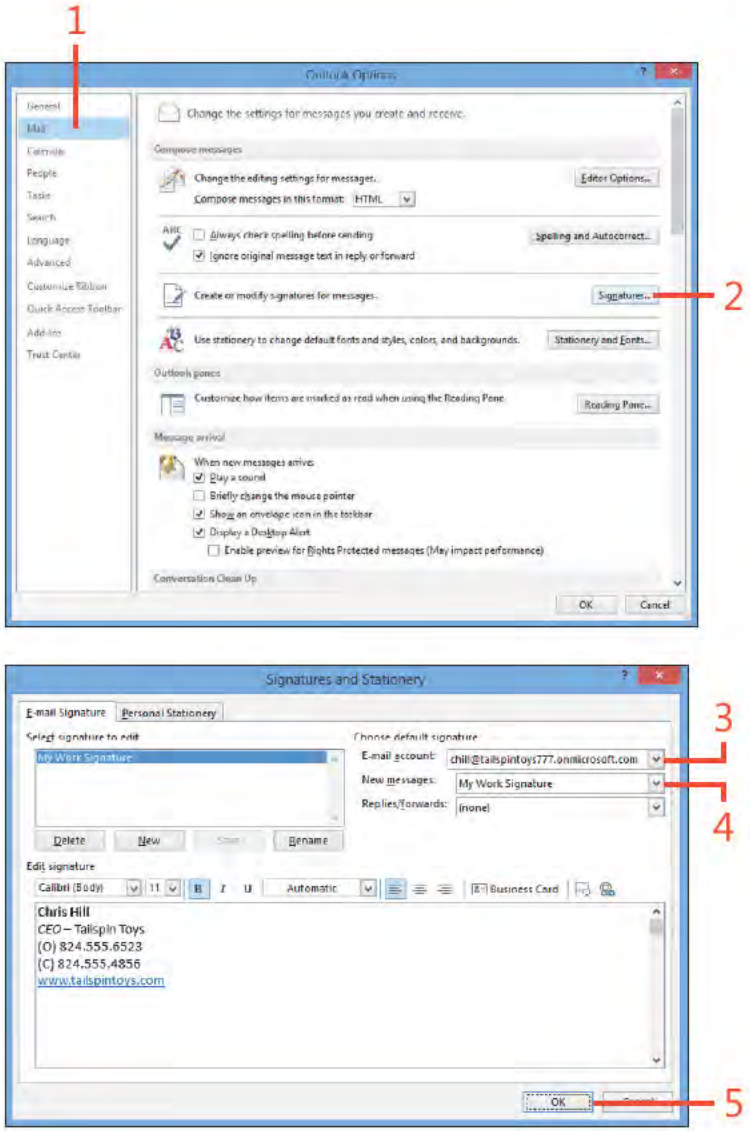
1 On the r bbon, c ck the F e tab to d sp ay the Backstage v ew, c ck the Opt ons tab to open the Out ook Opt ons d a og box, and then c ck Ma

2 C ck S gnatures to open the S gnatures And Stat onery d a og box

3 From the Ema Account drop-down st, se ect the account to wh ch you want to ass gn the s gnature

4 In the New Messages drop-down st, se ect a s gnature

5 C ck OK to c ose the S gnatures And Stat onery d a og box C ck OK aga n to c ose the Out ook Opt ons d a og box



TIP If you want your signature to appear in messages you reply to or forward, select the appropriate signature from the Replies/Forwards drop-down list.

SEE ALSO For information about replying to and forwarding messages, see "Replying to and forwarding email" on page 76.

www.it-ebooks.info

Choosing a signature for a message

1 Start a new ema message

2 If a s gnature s a ready nc uded, se ect and de ete t

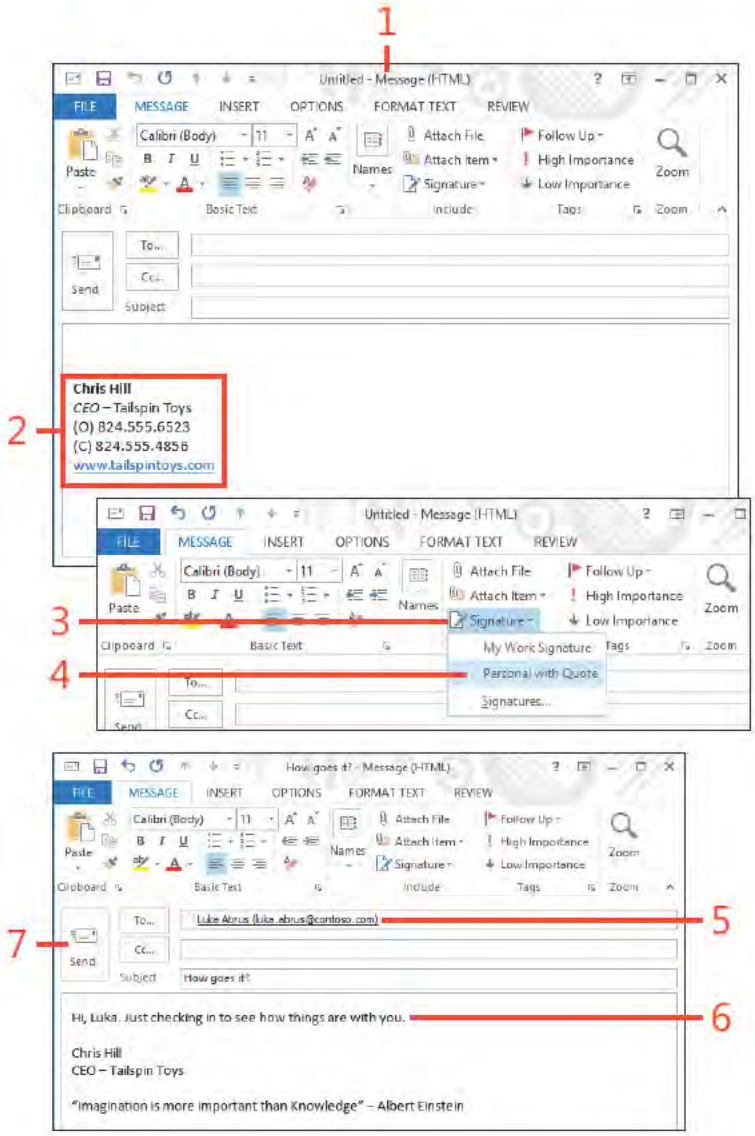
3 On the Message tab, n the Inc ude group, c ck S gnature

4 In the drop-down st that appears, choose the s gnature that you want to use for the current message

5 Add a rec p ent

6 Type your message

7 C ck Send



www.it-ebooks.info

Working with HTML stationery

Outlook includes a set of predefined designs and color schemes that you can add to your rich text–formatted messages. These are known as HTML stationery. You can use or modify the stationery Outlook provides. When you create a message, you can specify which stationery you want to use, or you can set Outlook to use a default stationery pattern each time you create a new message. You can also specify the background image or color for an individual message.

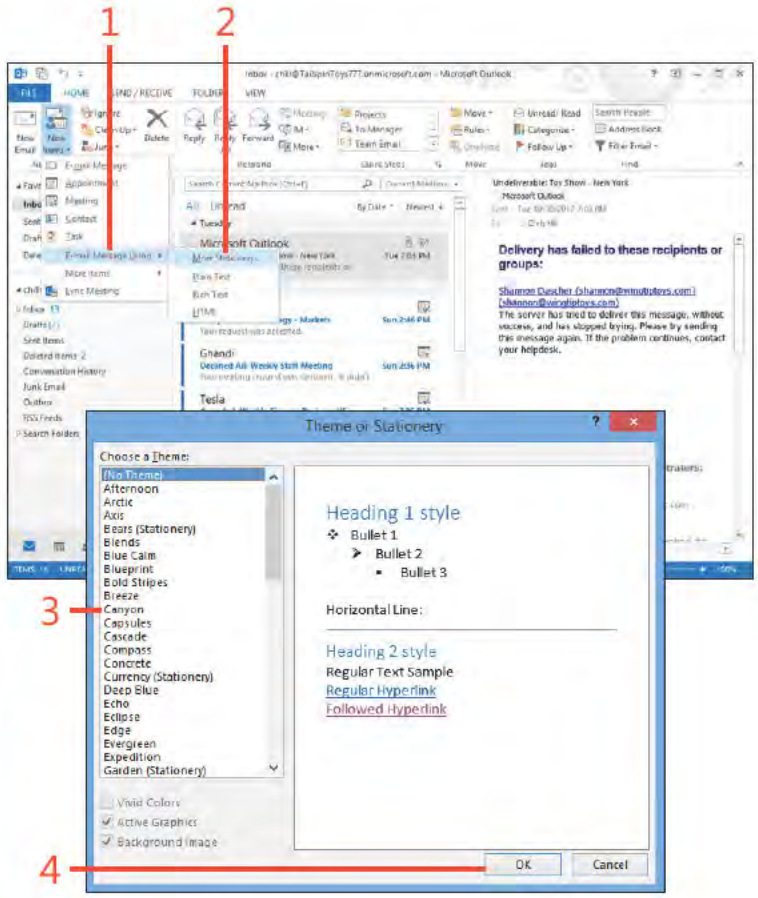
Select stationery

1 On the Home tab, n the New group, c ck New Items and then, n the drop-down st that appears, po nt to E-ma Message Us ng

2 On the submenu that appears, c ck More Stat onery

3 In the Theme Or Stat onery d a og box, choose the stat onery that you want for your new message

4 C ck OK



TIP You can also use Office themes for messages. To do so, on the ribbon, on the Options tab, click the Themes button. In the gallery that opens, you can select an existing theme, browse for themes, save the current them, or search the Microsoft Office Online website for more themes.

CAUTION To use HTML stationery, your message must be in HTML format. Your recipients' email programs must be able to read this type of formatting; otherwise, they won't be able to see the stationery or any other formatting on your page.

www.it-ebooks.info

Edit stationery

1 On the r bbon, c ck the F e tab to d sp ay the Backstage v ew, c ck the Opt ons tab to open the Out ook Opt ons d a og box, and then c ck Ma

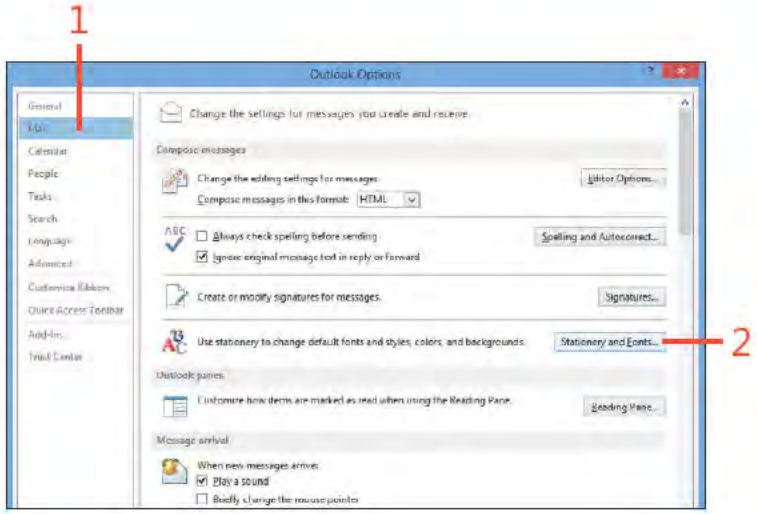
2 C ck Stat onery And Fonts to open the S gnatures And Stat onery d a og box

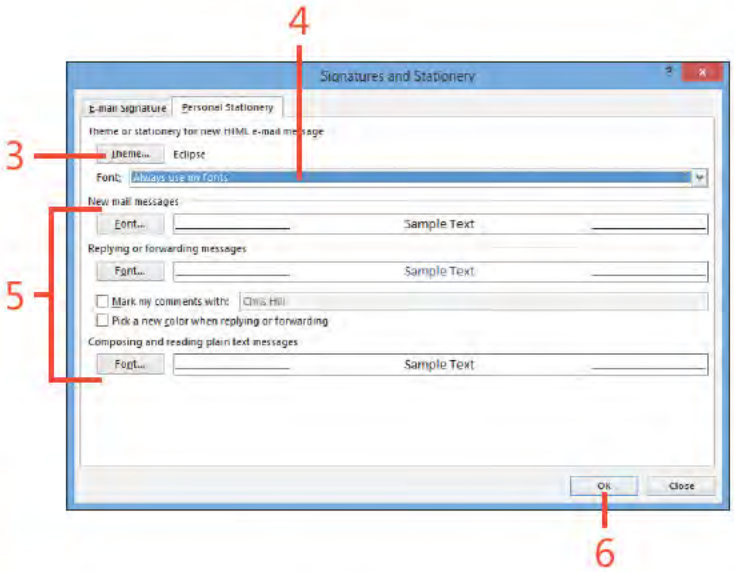
3 C ck Theme, choose the stat onery you want to ed t, and then c ck OK

4 From the Font drop-down st, choose A ways Use My Fonts

5 Choose the font opt ons that you want to mod fy

6 C ck OK to c ose the S gnatures And Stat onery d a og box C ck OK aga n to c ose the Out ook Opt ons d a og box





SEE ALSO To learn how to change to HTML formatting, see "Use a rich text or HTML message format" on page 47.

www.it-ebooks.info

Sending a file by email

Sometimes, when you create an email message in Outlook 2013, you want to send along a file as well. Files sent with email are called message attachments. When you send the message, the file goes along with the message; the recipient can open it on his or her computer. You can also insert pictures into your email messages.

Insert a picture

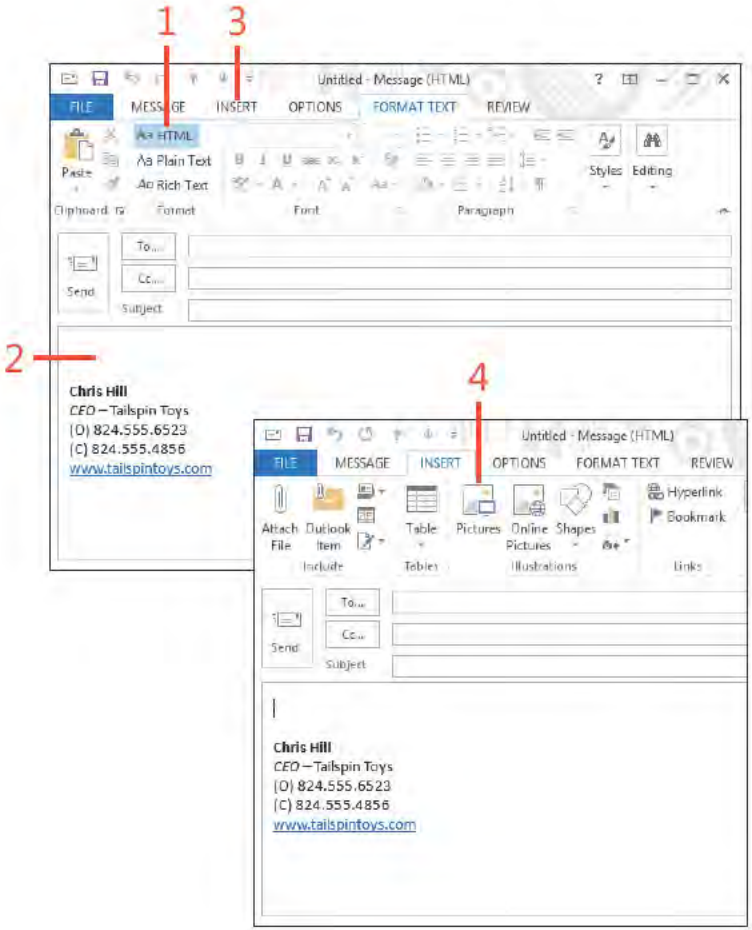
1 To nsert a p cture n a message, you must choose e ther HTML or R ch Text format for the message Open the message nto wh ch you want to nsert a p cture and then, on the Format Text tab, the Format group, choose HTML or R ch Text

2 C ck n the body of the message

3 On the r bbon, c ck the Insert tab

4 C ck P cture to open the Insert P cture d a og box

(continued on next page)



www.it-ebooks.info

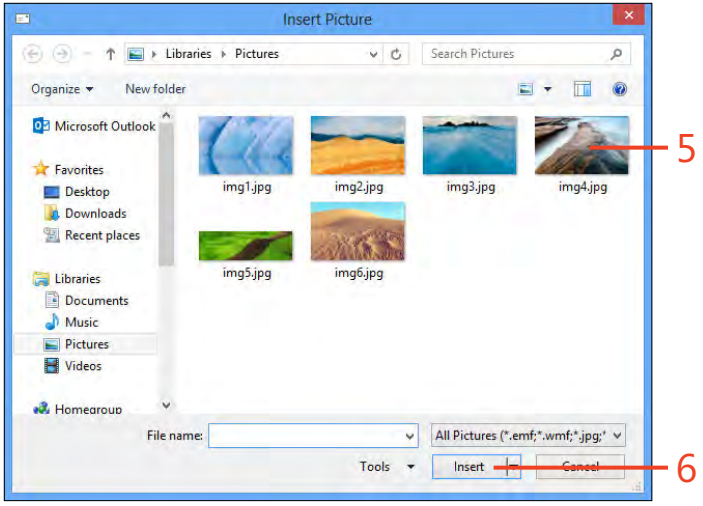
Insert a picture *(continued)*

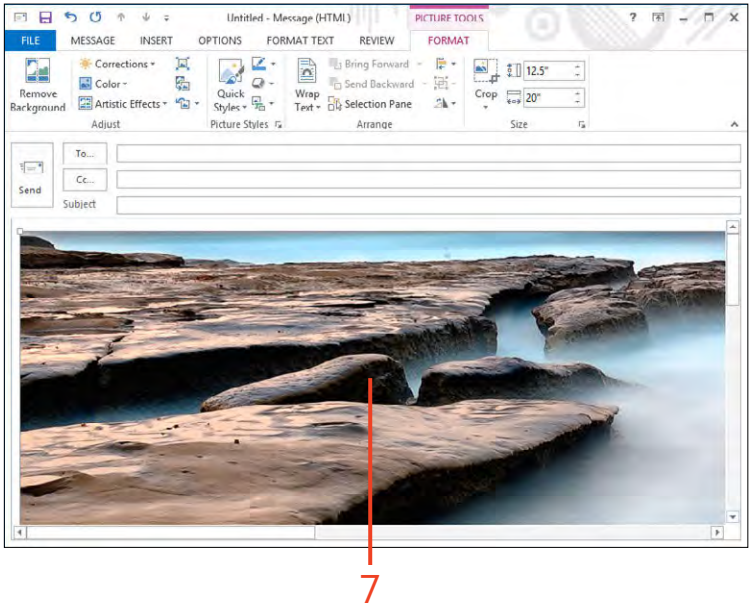
5 Choose the p cture that you want to nsert

6 C ck Insert

7 The p cture s now part of the message

(continued on next page)





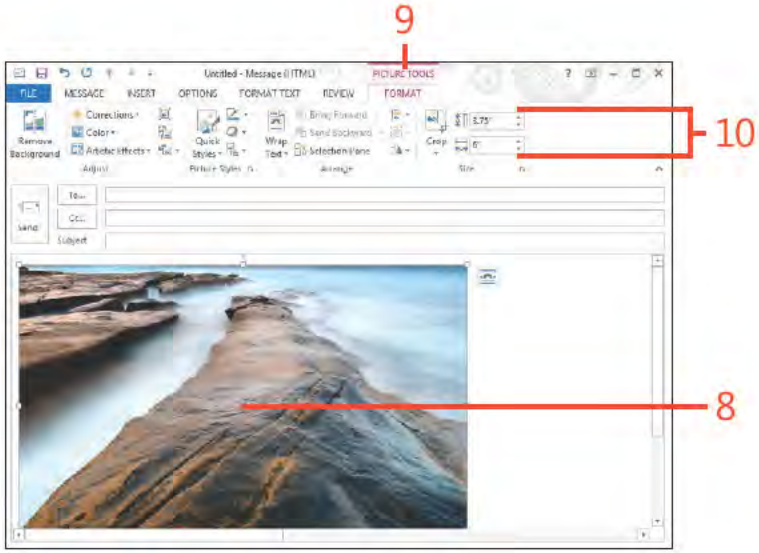
www.it-ebooks.info

Insert a picture *(continued)*

8 C ck the p cture to se ect t

9 On the r bbon, C ck the P cture Too s Format contextua tab

10 Res ze the p cture as needed

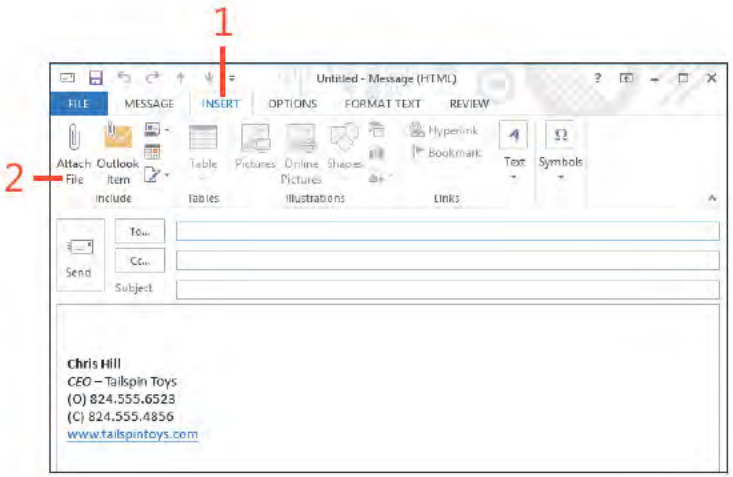


Attach a file

1 Open a new message On the r bbon, c ck the Insert tab

2 In the Inc ude group, c ck Attach F e

(continued on next page)



CAUTION The recipient of an attached file must have an application on his or her computer that can open the attached file. If not, you might need to save the file in a format that your recipient is able to use, before sending the file.

www.it-ebooks.info

Attach a file *(continued)*

3 In the Insert F e d a og box, c ck the f e that you want to attach

4 C ck Insert

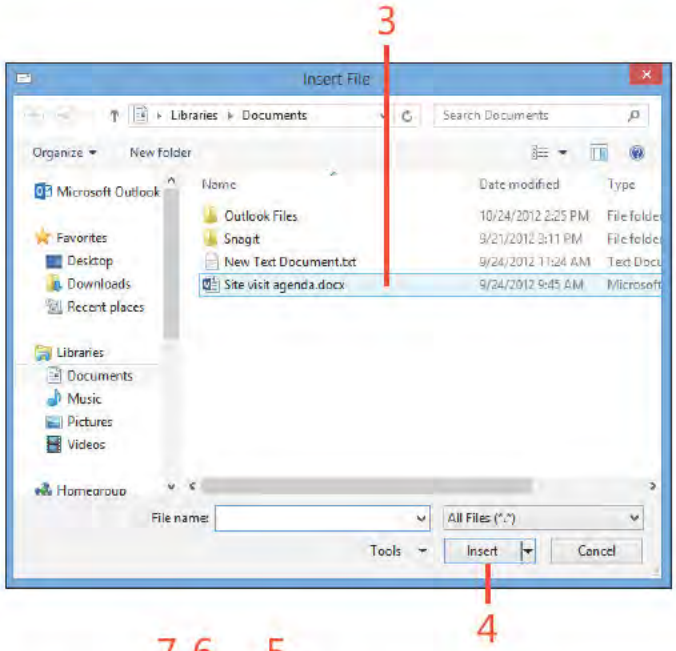
5 The f e s nserted nto the message

6 Add a rec p ent

7 Add a subject

8 Add message text

9 C ck Send



SEE ALSO For information about saving and opening file attachments you receive from other people, see "Working with attachments" on page 74.

www.it-ebooks.info

Sending messages manually

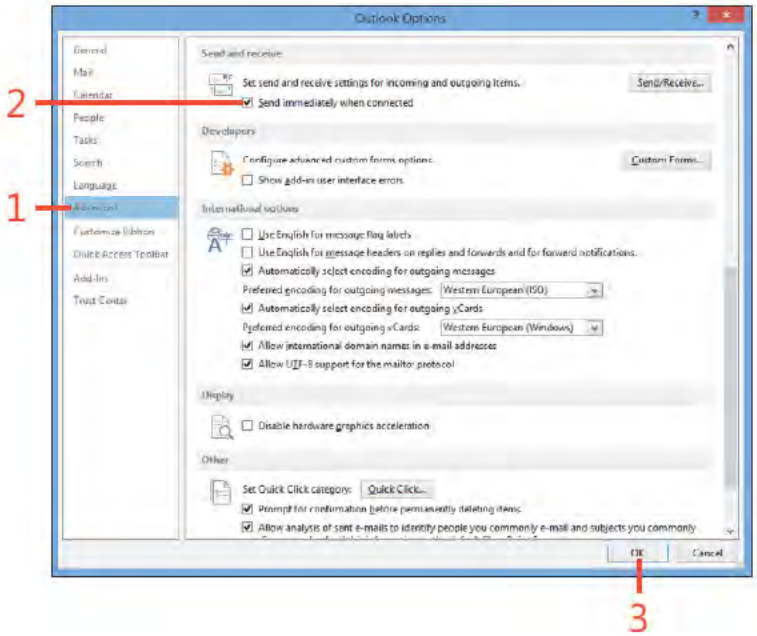
When you send a message, it travels across the local area network or the Internet to the mailbox of the person you specify as the recipient. If you specify more than one recipient, Outlook 2013 sends a copy of the message to everyone you specify. By default, Outlook sends messages automatically as soon as they are placed in the Outbox. You also can configure Outlook to hold your messages in the Outbox until you're ready to send them. (Clicking Send places the message in the Outbox.)

Configure Outlook to not send messages automatically

1 On the r bbon, c ck the F e tab to d sp ay the Backstage v ew, c ck the Opt ons tab to open the Out ook Opt ons d a og box, and then c ck Advanced

2 C ear the Send Immed ate y When Connected check box

3 C ck OK to c ose the Opt ons d a og box



CAUTION If Outlook is set up to send your messages as soon as you click the Send button, you can't change anything in your message before it's routed to your recipients. Even if your message is incomplete or contains confidential information, you can't recall the message (unless you're using Exchange Server).

www.it-ebooks.info

Send and receive messages manually

1 Create a new message

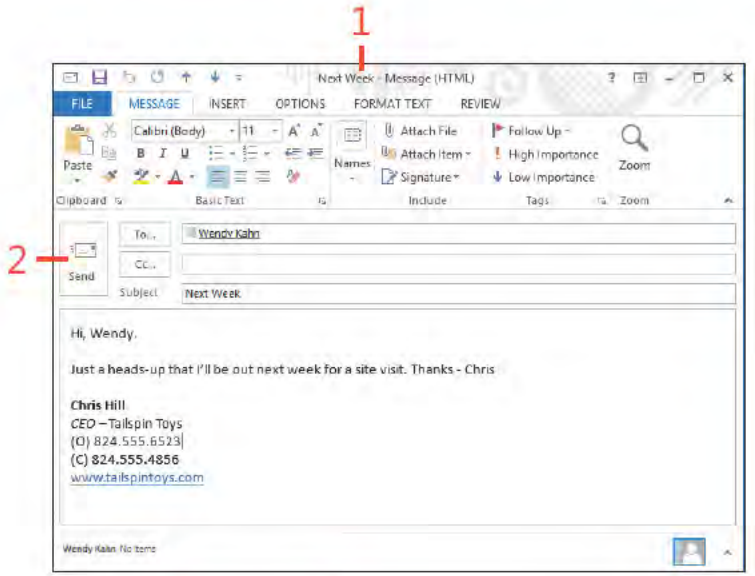
2 C ck Send to send the message to the Outbox fo der

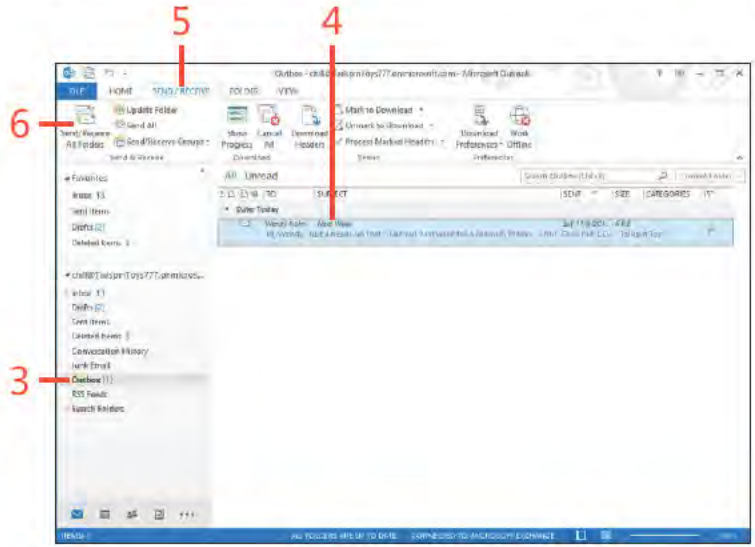
3 In the Fo der pane, c ck Outbox

4 Conf rm that a message s wa t ng n the Outbox fo der

5 On the r bbon, c ck the Send/Rece ve tab

6 C ck the Send/Rece ve A Fo ders button





SEE ALSO For information about receiving email messages, see "Receiving and reading email" on pages 66 and 68.

www.it-ebooks.info

Reviewing sent messages and drafts

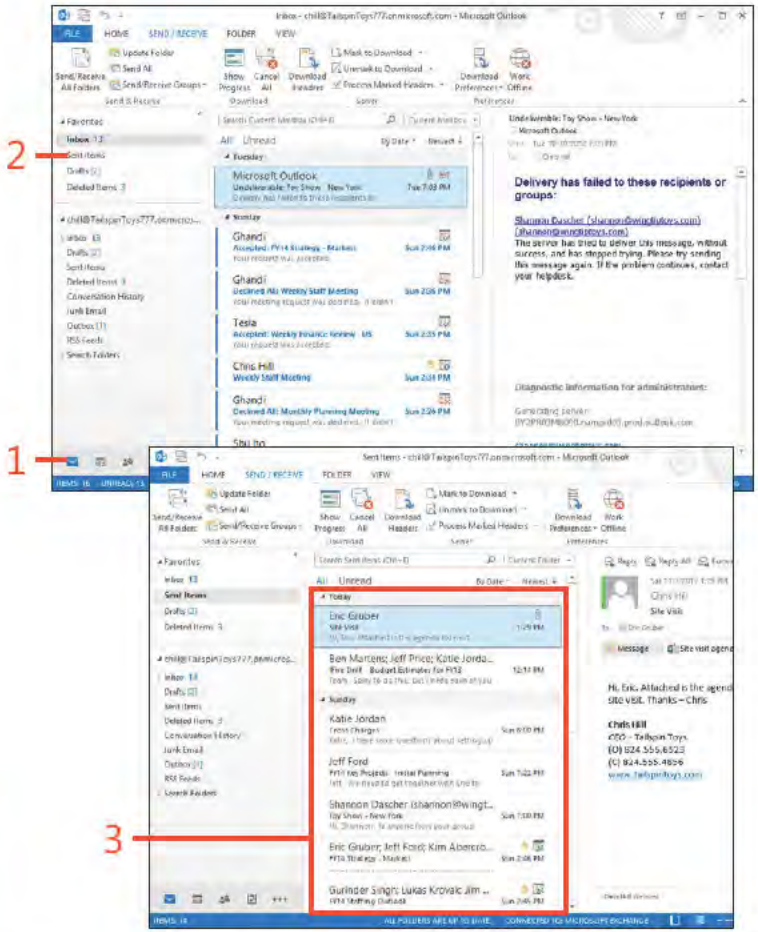
When you send a message, Outlook 2013 stores a copy of it in the Sent Items folder. You can use this folder to keep track of all the messages you've sent to recipients. You can open this folder and review messages you've sent to other users. Outlook also includes a Drafts folder that stores new messages you're working on but are not ready to send.

Open the Sent Items folder

1 At the bottom of the Fo der pane, c ck the Ma button

2 In the Fo der pane, c ck the Sent Items fo der

3 Rev ew the contents of the Sent Items fo der



TRY THIS! Create and send a few messages to others. Then, open the Sent Items folder to see how the sent messages appear there.

www.it-ebooks.info

Open a message from the Drafts folder

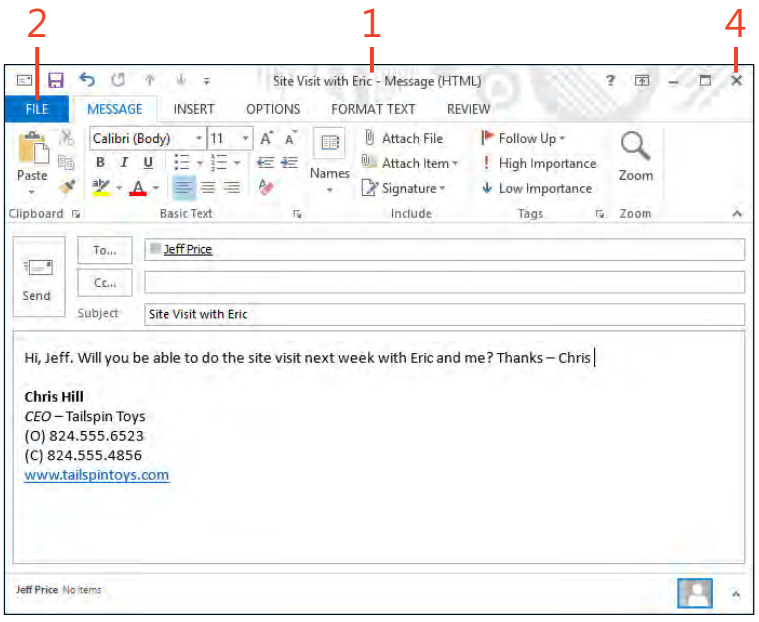
1 Create a new message w th rec p ent, subject, and body text

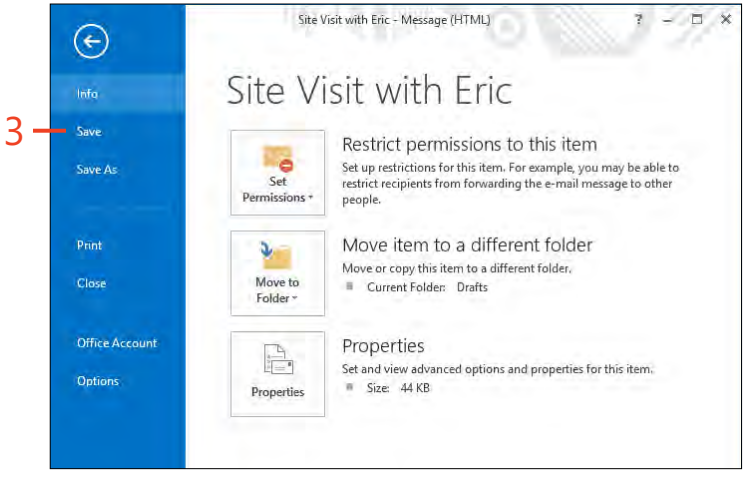
2 C ck the F e tab to d sp ay the Backstage v ew

3 Choose the Save tab

4 C ck the C ose tab

(continued on next page)



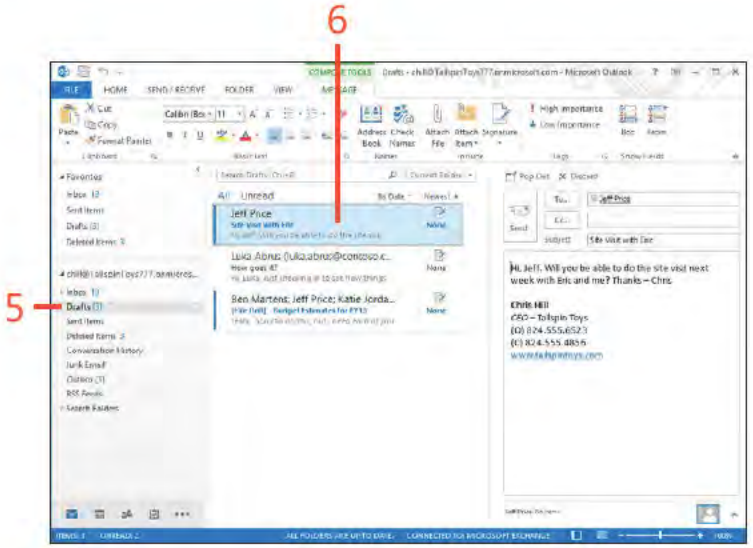


www.it-ebooks.info

Open a message from the Drafts folder *(continued)*

5 In the Fo der pane, c ck the Drafts fo der

6 Doub e-c ck the message that you want to open and then ed t and send t



SEE ALSO You can move a message or group of messages from the Drafts folder to the Outbox folder without opening any first. To learn how to move items to different folders, see "Organizing with folders" on page 220.

www.it-ebooks.info

Receiving and reading email

5

To receive email messages that have been sent to you, Microsoft Outlook 2013 connects to an email server on which messages are stored (such as servers located on a local area network or the Internet) and downloads the messages (or copies of them) to your Inbox folder. From there, you can read a message, reply, forward it to someone, flag it for later action, and open file attachments. In most cases, messages that you download are deleted from the server automatically after they're downloaded.

Outlook can also filter out junk email by placing in the Junk Email folder any mail that contains certain words or phrases or that arrives from certain addresses. You can adjust these filters to block mail from unwanted senders while still allowing through the mail that you want to read. You also can set up Outlook Rules, which help you to manage your messages by moving them to designated folders, flagging them, or otherwise processing messages in accordance with rules that you define.

This section shows you how to receive, read, reply to, follow up on, and forward messages in Outlook. You learn how to manage your Inbox by deleting, saving, and printing messages. Finally, you learn how to handle junk mail, set up rules that personalize your email experience, and work with email attachments.

In this section:

- Receiving email
- Reading email
- Managing the Inbox folder
- Working with attachments
- Replying to and forwarding email
- Handling junk mail
- Working with the Rules Wizard
- Following up on a message

www.it-ebooks.info

Receiving email

Outlook 2013 makes it easy for you to receive your incoming messages. You can schedule Outlook to download your new messages, or you can manually download new messages when you want.

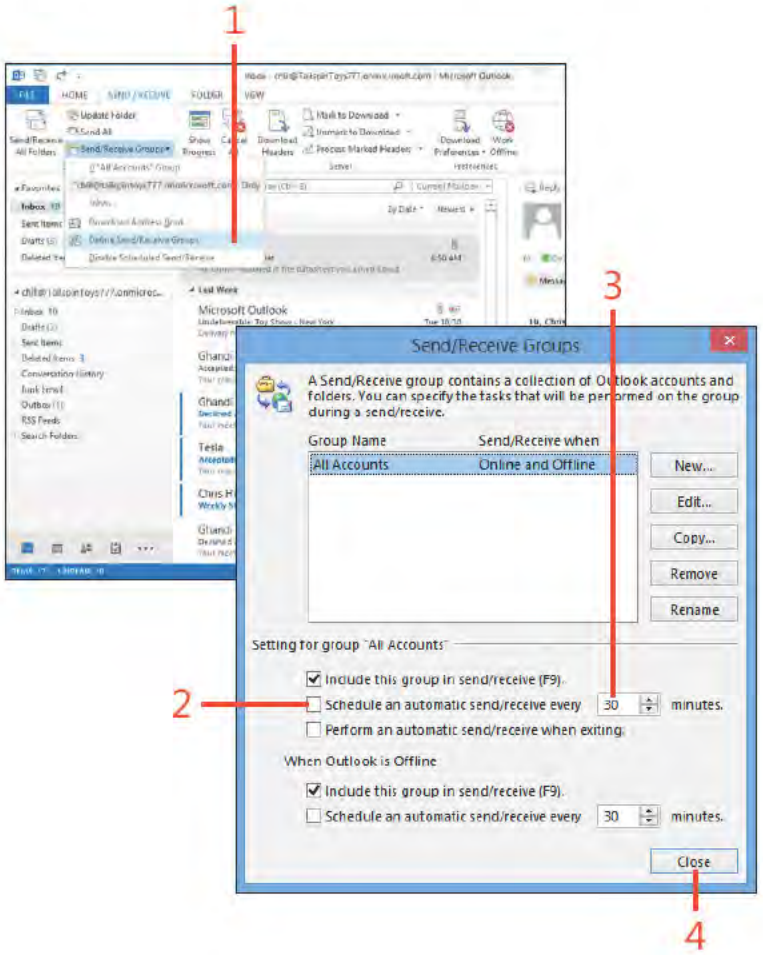
Configure Outlook to retrieve email automatically

1 On the Send/Rece ve tab, n the Send & Rece ve group, c ck Send/Rece ve Groups and then, n the drop-down st that appears, c ck Def ne Send/Rece ve Groups

2 In the Send/Rece ve Groups d a og box, se ect the Schedu e An Automat c Send/Rece ve Every *n* M nutes opt on

3 Type the number of m nutes between each down oad

4 C ck C ose



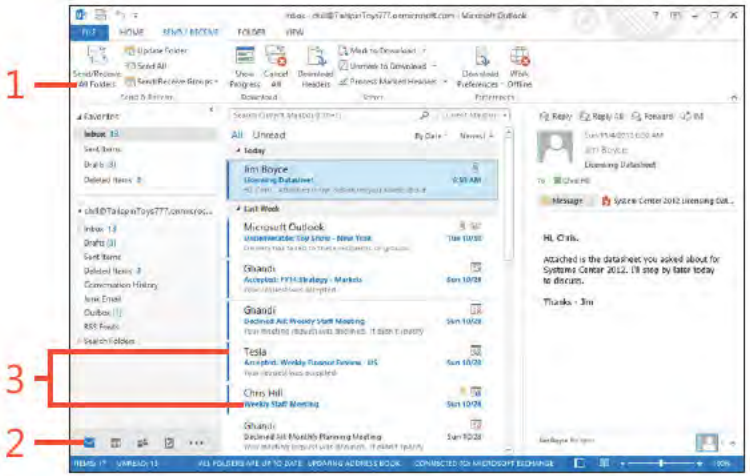
www.it-ebooks.info

Retrieve email manually

1 On the Send/Rece ve tab, n the Send & Rece ve group, c ck Send/Rece ve A Fo ders

2 At the bottom of the fo der pane, c ck the Inbox con to see your new messages

3 Messages that have not yet been read are shown w th a bo d subject and a ne to the eft of the message header



TRY THIS! If you have Outlook configured for several email message services, such as a Microsoft Exchange server and an Internet email service, or two different Internet mail servers, clicking Send/Receive All Folders on the ribbon downloads new messages from all these services. If you want to download messages from only one service, click the Send/Receive Groups button on the Send/Receive tab on the ribbon and then select a service from the Send/Receive Groups menu.

TIP The total number of email messages in your Inbox folder appears on the status bar along with the number of unread messages. The number of unread messages also appears next to the Inbox icon in the Folder pane.

www.it-ebooks.info

Reading email

After you receive a message in your Inbox folder, you can preview it or read its contents. The Inbox folder displays the sender's name, the message subject, the date the message was received, the size of the message, and whether the message has an attachment.

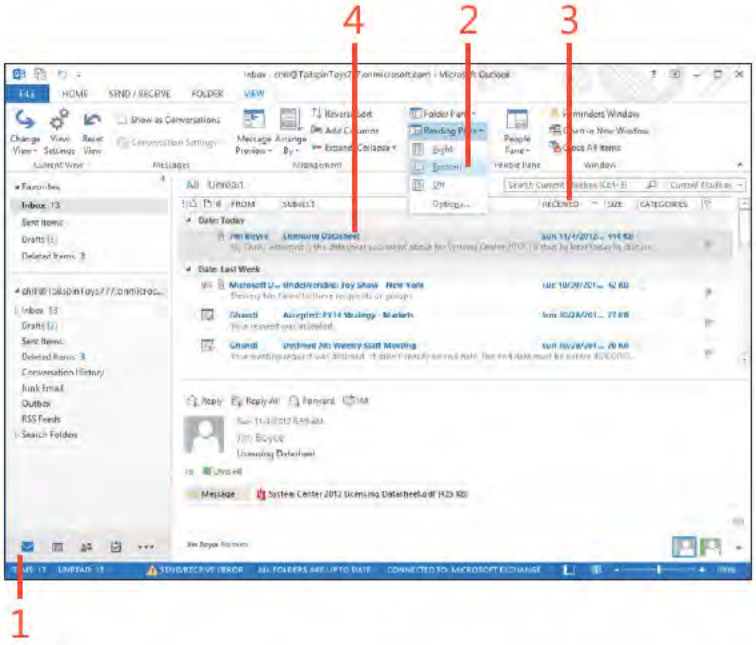
Locate new messages

1 At the bottom of the fo der pane, c ck the Ma button and open the Inbox

2 On the r bbon, c ck the V ew tab In the Layout group, c ck Read ng Pane and then, on the drop-down menu that appears, choose Bottom

3 C ck the Rece ved co umn to sort your new messages by the date you rece ved them

4 Messages you have not read appear n bo dface



TRY THIS! Click the Received column once. If the most current date is at the top of the list, you're sorting from the most current date received to the earliest date received. Click the Received column again to reverse the order of sorting, from the earliest date to the most current.

TIP If the reading pane is displayed at the right, you can click Newest or Oldest to change the sort order for messages in the Inbox.

www.it-ebooks.info

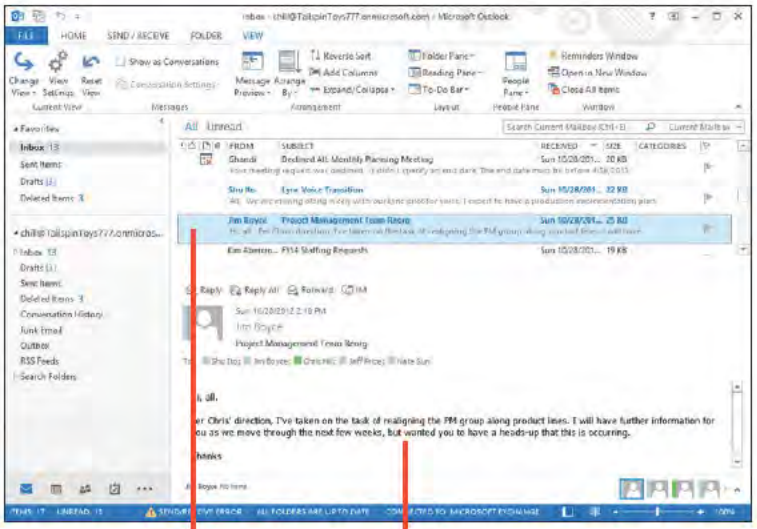
Open message items

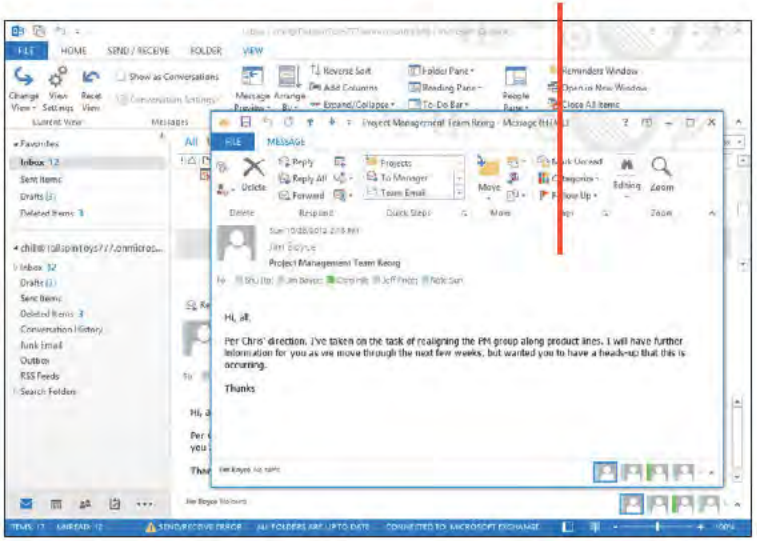
1 In the Inbox, c ck the message that you want to read

2 V ew ts contents n the Read ng pane

3 Doub e-c ck the message to open t

4 V ew the message n ts own w ndow





TIP To turn off the Reading pane, on the View tab, in the Layout group, click Reading Pane and then, on the drop-down menu that appears, click Off. To turn it back on, choose Right or Bottom from the Reading Pane menu.

TRY THIS! You can have Outlook display a few lines of each message by choosing Preview from the Change View button on the View tab on the ribbon. This shows the first few lines of the messages in the Inbox folder.

www.it-ebooks.info

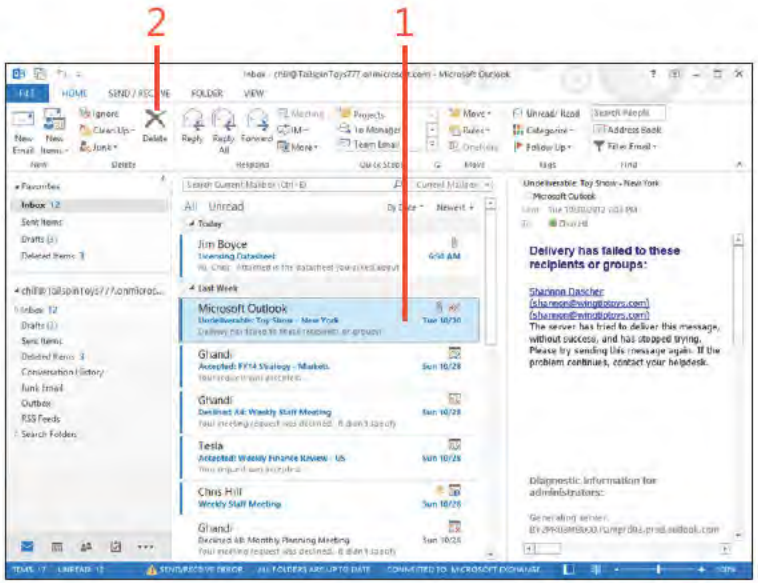
Managing the Inbox folder

Over time, your Inbox folder can quickly fill with hundreds of messages. This makes finding messages more difficult and takes up storage space on your device. You can reduce these problems by managing your Inbox folder. Some of the administrative tasks you can perform include deleting unneeded messages, saving important messages, and printing a copy of a message to read or store in hardcopy format.

Delete unneeded messages

1 Se ect the message(s) that you you want to de ete

2 On the r bbon, c ck the Home tab and then, n the Respond group, c ck the De ete button



CAUTION Outlook does not ask whether you're sure you want to delete a message. Make sure that you want to delete the message before you press Delete or choose the Delete command. You can press Ctrl+Z to undo a deletion.

TIP Deleted messages are moved to the Deleted Items folder and can be moved back to your Inbox folder if necessary. If you delete messages from the Deleted Items folder, those items are generally gone for good (unless you had copied them to another folder). However, if you're using Exchange Server, you can recover deleted items up to a period of time set by the mail administrator.

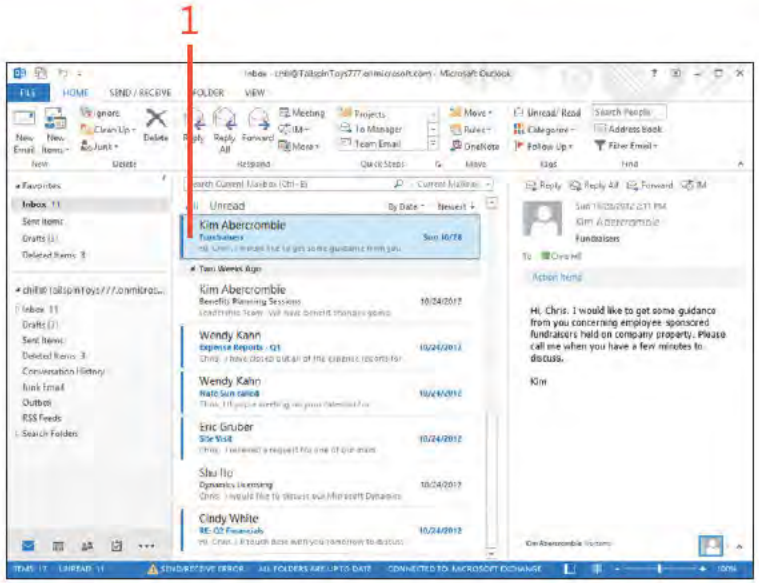
www.it-ebooks.info

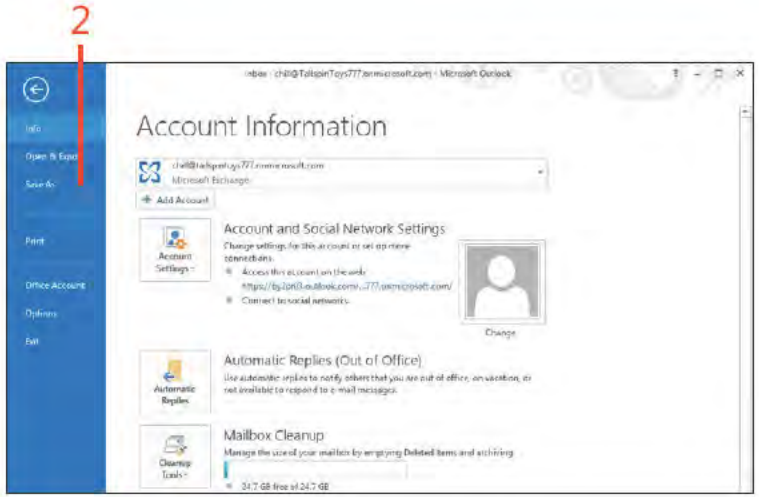
Save important messages

1 Se ect the message(s) that you want to save

2 On the r bbon, c ck the F e tab to d sp ay the Backstage v ew and then c ck the Save As tab

(continued on next page)





TIP To find a message from a specific sender, click the From column. This sorts messages alphanumerically, based on the sender's name.

SEE ALSO To learn more about managing items and folders, see "Managing items and folders" on page 211.

www.it-ebooks.info

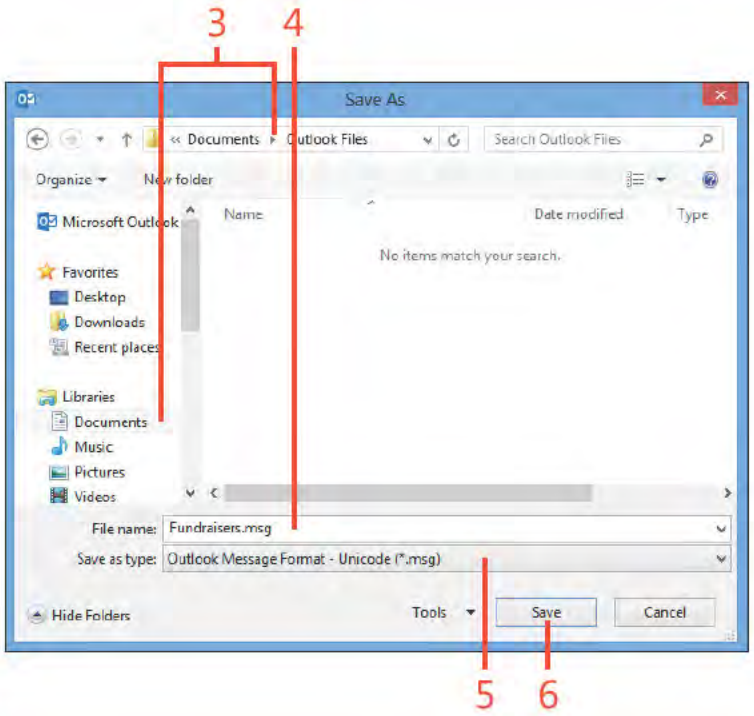
Save important messages *(continued)*

3 In the Save As d a og box, choose a fo der n wh ch to store the message

4 Opt ona y, type a new name for the message

5 Choose the des red f e type

6 C ck Save



TIP To save the message in a format other than message format (.msg), click the Save As Type drop-down list and choose the format type. You can save messages in text, HTML, MHT, Outlook template, and two message formats. This makes it handy when you want to open the message in another application, such as a word processor or Internet web browser. Note that you can't save a plain text message in HTML.

CAUTION When you save a message in a format other than .msg, the formatting of the message itself might change. If this is the case, you might find it difficult to read the message without modifying it.

www.it-ebooks.info

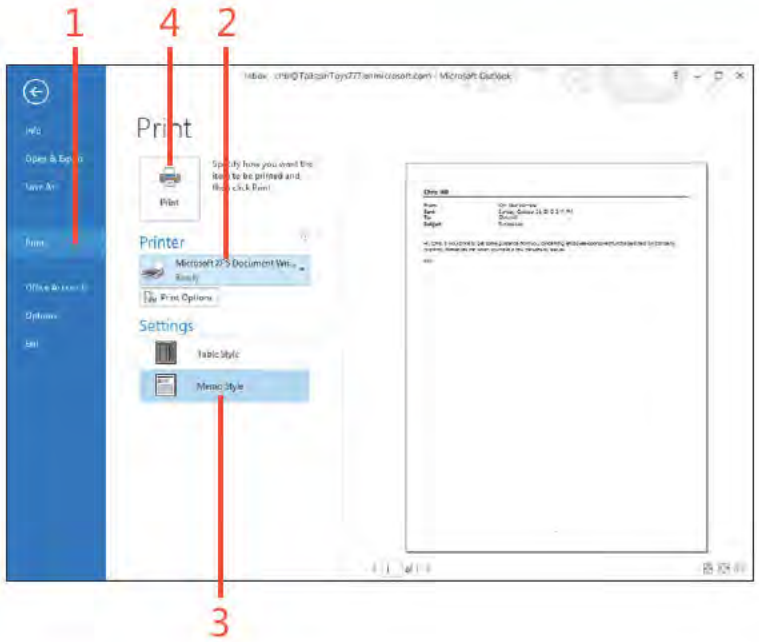
Print a copy of a message

1 Se ect a message Then, on the r bbon, c ck the F e tab to d sp ay the Backstage v ew and c ck the Pr nt tab

2 C ck the Pr nter drop-down st and se ect the pr nter that you want to use

3 C ck the Pr nt Sty e opt on that you want

4 C ck Pr nt



TIP With a message open, on the Quick Access Toolbar, click Quick Print to print to the default printer. If Quick Print does not appear on your Quick Access Toolbar, you can customize it to add that option. Use the buttons in the lower-right corner of the Print page to control print preview options.

www.it-ebooks.info

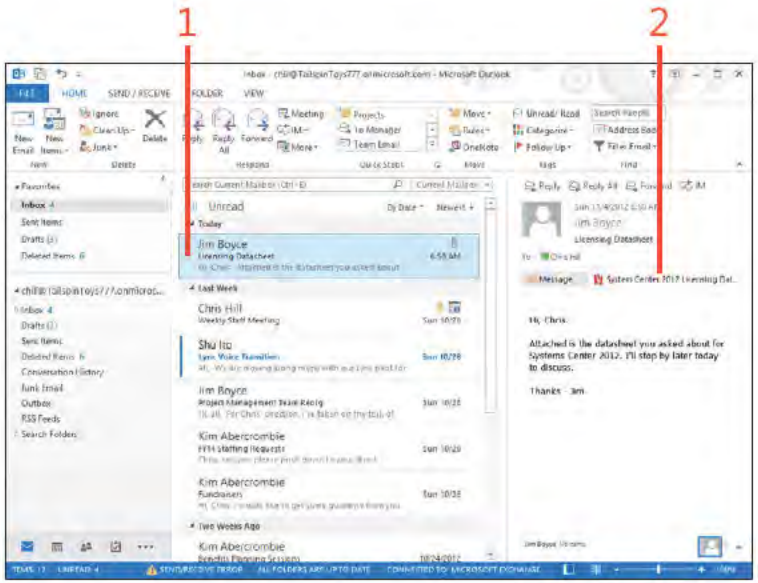
Working with attachments

When you receive an email attachment, you can open it directly from the message, save it to devices storage medium and open it from there, or print it straight from the message to a printer. Messages that have attachments display a paper-clip icon to the left of the message author's name or below the message received date, depending on the location of the Reading pane and the width of the display.

Open an attachment

1 C ck a message that has an attachment

2 In the Read ng pane, doub e-c ck the attachment



TIP To open an attachment, you must have an application that supports the attached file. For example, if you receive a Microsoft PowerPoint file (.ppt or .pptx), you must have PowerPoint, the PowerPoint Viewer, or some similar application installed on your system to view the file.

SEE ALSO For information about attaching files to messages you send, see "Sending a file by email" on page 56.

www.it-ebooks.info

Save an attachment

1 C ck the message that has the attachment

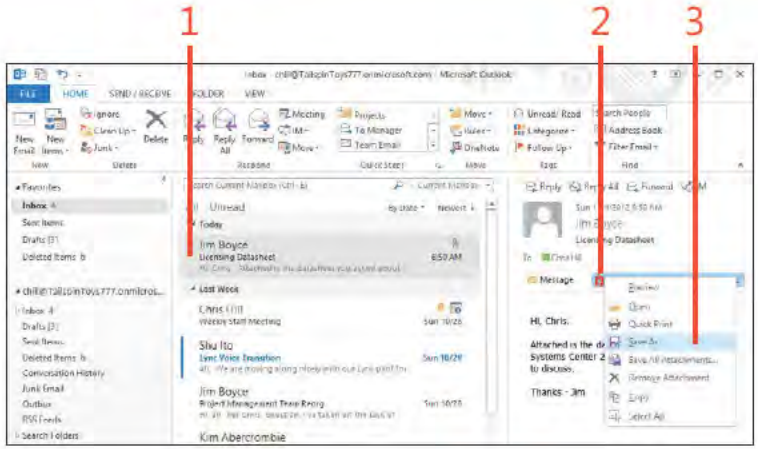
2 In the Read ng pane, n the Attachment f e d, r ght-c ck the attachment

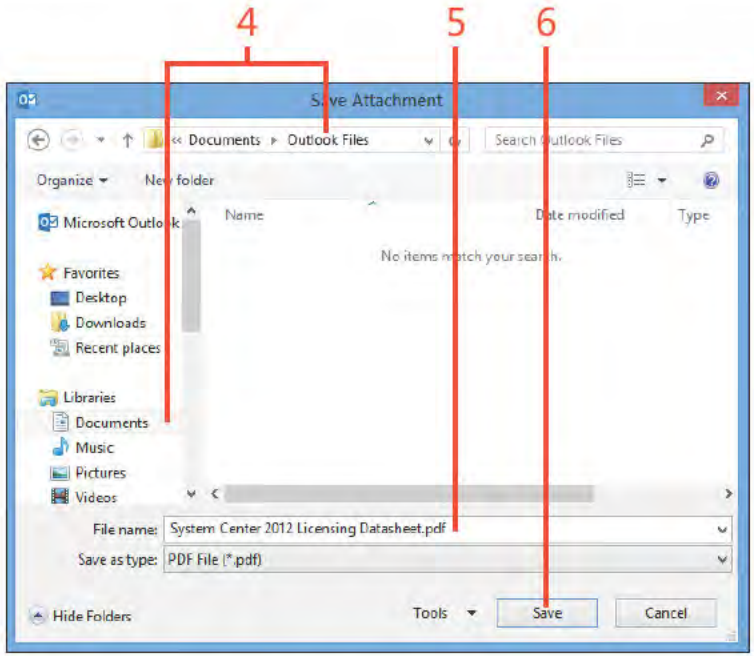
3 On the shortcut menu that appears, c ck Save As

4 Choose the fo der where you want to save the f e

5 Make any necessary changes to the f e name

6 C ck Save





CAUTION Some files that you receive from another user, such as programs, webpages, and script files, can be infected with a computer virus. You should save all executable files to your system and run an antivirus program that checks the file for a virus before you open it. If you receive an attachment from an unknown sender (as happens a lot with junk email), you should never open it. Just delete the message.

www.it-ebooks.info

Replying to and forwarding email

When you receive a message, you can reply directly to the sender. You can also forward the message or send a response to everyone who receives the message. When you reply to a message, Outlook 2013 keeps the original message text; you add your new text above it. The sender's name becomes the recipient name, and the subject line begins with "RE:" to denote that the message is a reply.

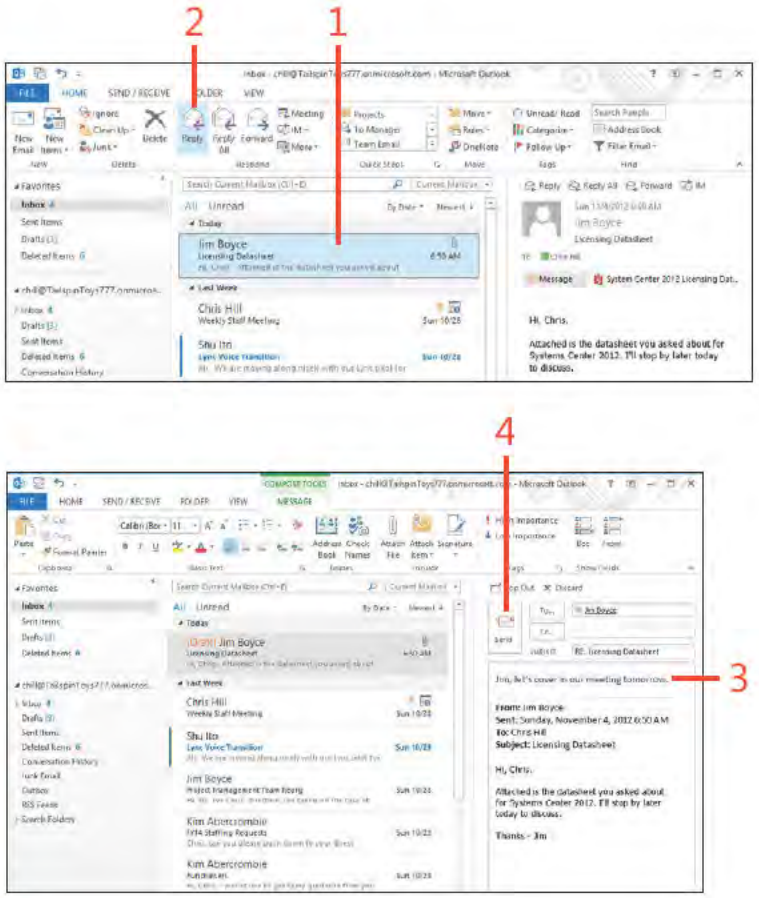
Reply to an email message

1 C ck the message to wh ch you want to rep y

2 On the r bbon, c ck the Home tab and then, n the respond group, c ck the Rep y button

3 C ck n the space above the or g na message ne and type your rep y

4 C ck Send



TIP When you reply to messages that have attachments, the reply message does not include the attached file.

TIP To reply to all recipients of a message, on the ribbon, on the Home tab, click Reply All. To open the draft message in its own window, above the Reading pane, click Pop Out.

www.it-ebooks.info

Forward an email message

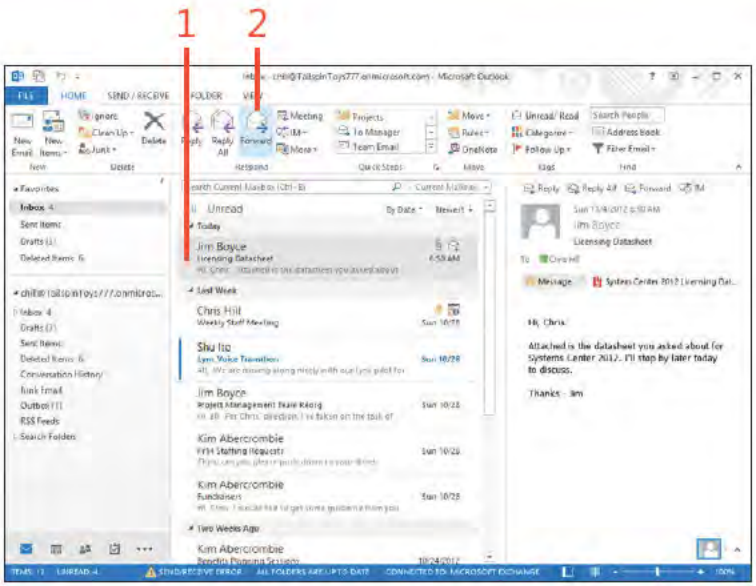
1 C ck the message that you want to forward

2 On the r bbon, c ck the Home tab and then, n the Respond group, c ck the Forward button

3 Add the address to wh ch you want to forward th s message

4 Opt ona y, you can c ck n the space above the or g na message ne and type a message

5 C ck Send



TIP When you forward messages that have attachments, the forwarded message includes the attached file.

SEE ALSO For information about addressing messages, see "Writing an email message" on page 36.

www.it-ebooks.info

Handling junk mail

Just like the junk mail that you receive in your postal mailbox, you probably get too many junk email messages (also known as spam) in your Outlook 2013 Inbox. You can set up mail filters that can sort your incoming mail so that junk mail is moved to its own folder, flagged, or deleted. You can also turn on mail filters so that only specific messages are displayed in the Inbox.

Turn on junk email filters

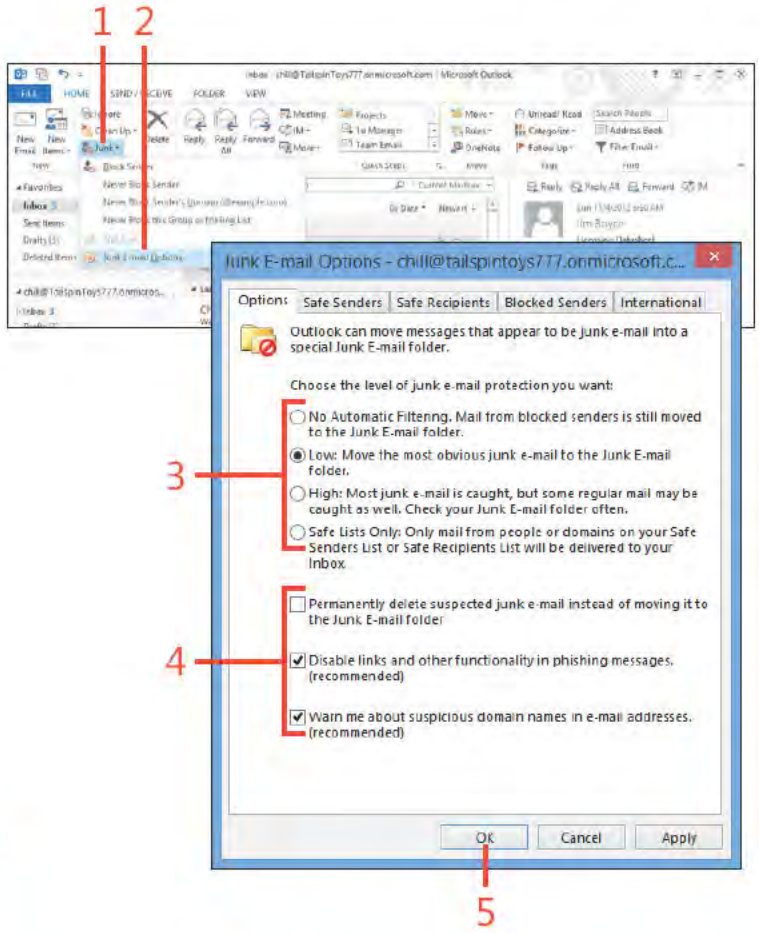
1 On the Home tab, n the De ete group, c ck the Junk button

2 On the drop-down menu that appears, c ck Junk E-ma Opt ons

3 In the Junk E-Ma Opt ons d a og box that opens, choose a junk f ter ng eve

4 Choose other ma secur ty opt ons that you want

5 C ck OK



SEE ALSO For more information about setting rules and filters, see "Working with the Rules Wizard" on page 81.

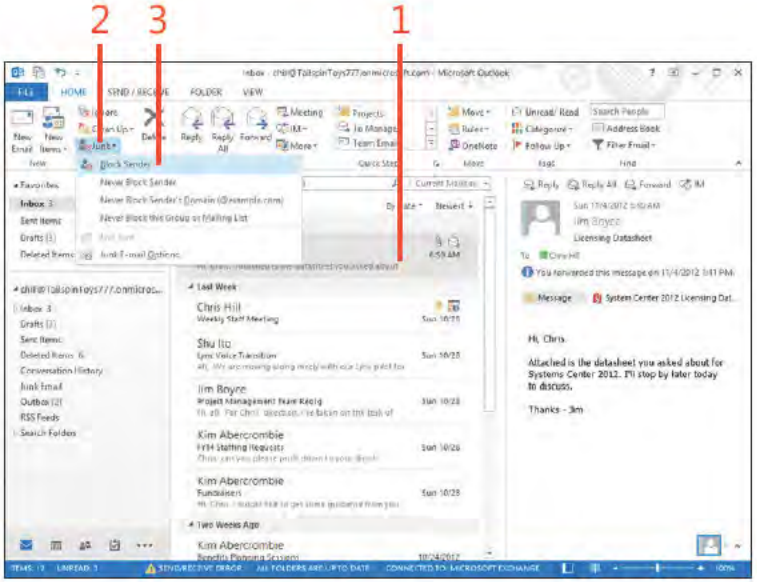
www.it-ebooks.info

Add to the junk mail senders list

1 In the Inbox fo der, c ck a message from a sender that you want to add to the junk ma senders st

2 On the r bbon, c ck the Home tab, and n the De ete group, c ck the Junk button

3 On the drop-down menu that appears, c ck B ock Sender



TIP One way that you can end up on a junk mail list is by filling out surveys and other online forms on websites. Usually these forms ask for your email address to process the form. To reduce the amount of junk email you get, limit the number of website surveys you fill out, or use a "junk" email account that you create just for this purpose.

CAUTION If you add a sender to the junk email list by accident, all messages from this sender might be deleted as soon as they're received by Outlook. If you think a legitimate sender is on your junk mail filter, see the next procedure for removing him from the list.

www.it-ebooks.info

Fine-tune the junk mail filter

1 On the Home tab, n the Respond group, c ck Junk and then, on the menu that appears, c ck Junk Ema Opt ons

2 In the Junk E-Ma Opt ons d a og box, c ck the B ocked Senders tab

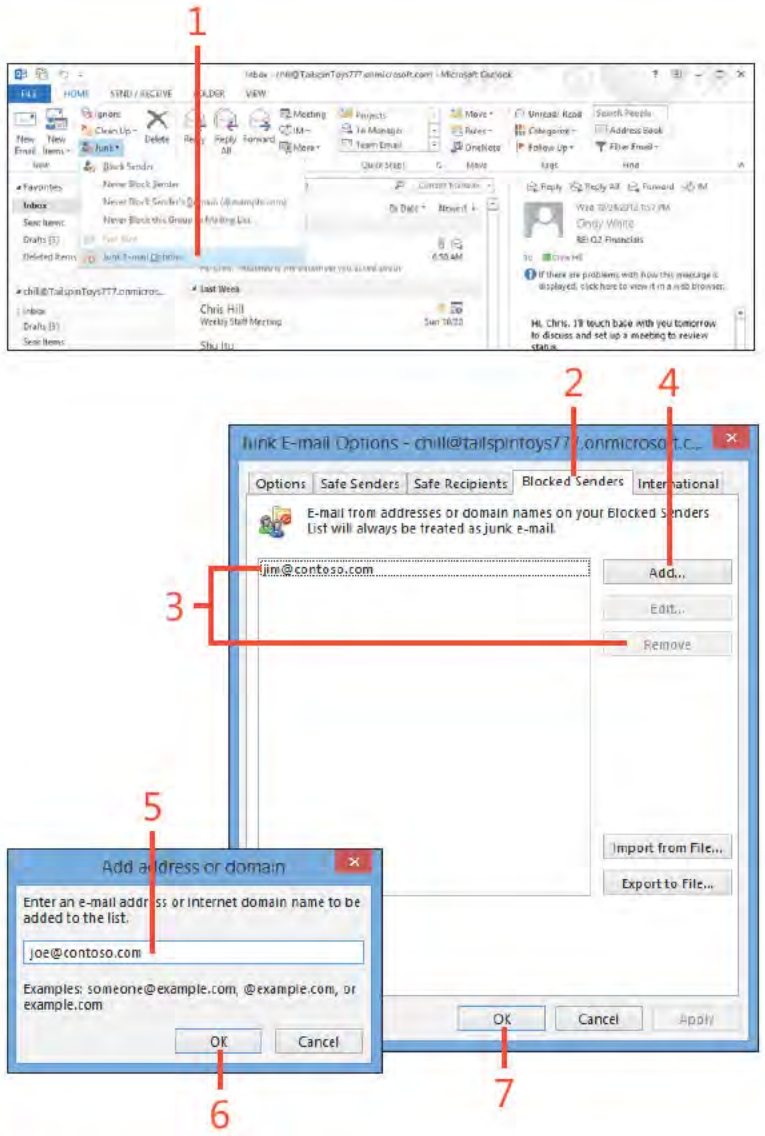
3 To remove a sender from the Junk Ma st, se ect a name and c ck Remove

4 To add a sender to the B ocked Senders st, c ck Add

5 In the Add Address Or Doma n d a og box, type the ema address or doma n of the junk ma sender

6 C ck OK to c ose the Add Address Or Doma n d a og box

7 C ck OK to c ose the Junk E-ma Opt ons d a og box



TIP You can block an entire domain, if needed. Blocking a domain blocks all messages from all addresses in that domain.

www.it-ebooks.info

Working with the Rules Wizard

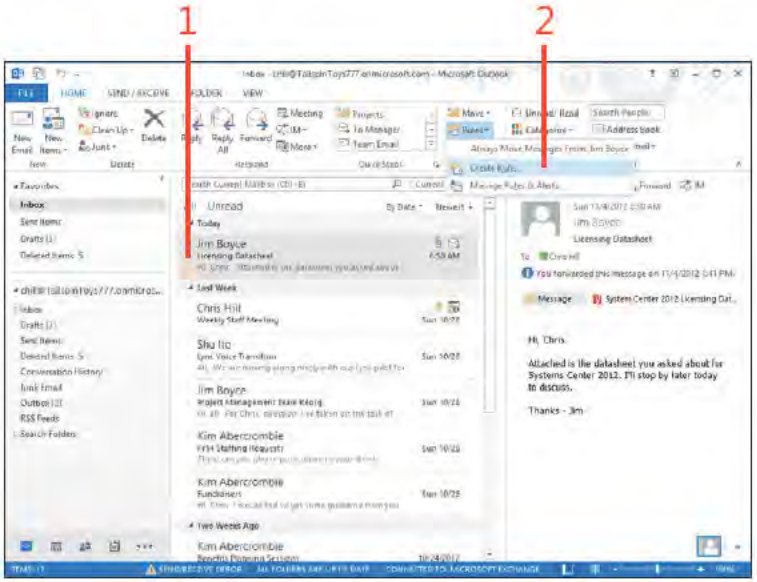
Rules are actions that Outlook performs on your messages to organize them. When you have Outlook rules set, many management tasks are taken care of automatically when your new messages arrive. To make setting up rules painless, Outlook includes a Rules Wizard that walks you through the process of creating a rule by referring to a message that you have already received. You can also create a rule from scratch.

Create a rule based on a message

1 In the Inbox fo der, c ck the message on wh ch you want to base the new ru e

2 On the r bbon, c ck the Home tab and then, n the Move group, c ck Ru es On the menu that appears, c ck Create Ru e

(continued on next page)



TIP You can select multiple conditions under which your new rule is applied. However, when you do this, the rule isn't applied unless all the conditions are met.

www.it-ebooks.info

Create a rule based on a message *(continued)*

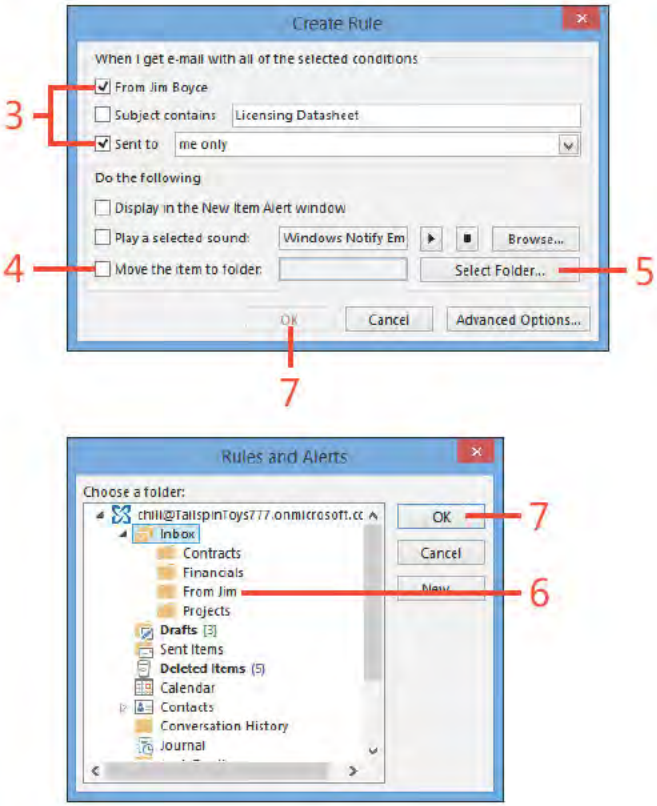
3 In the Create Ru e d a og box, choose the cond t ons to app y to the ru e

4 Choose the act on you want Out ook to perform on messages that match the cond t on For examp e, se ect the Move The Item To Fo der check box

5 C ck Se ect Fo der

6 In the Ru es And A erts d a og box, choose the fo der to wh ch you want the messages moved

7 C ck OK to c ose the Ru es And A erts d a og box C ck OK aga n to c ose the Create Ru e d a og box



SEE ALSO For more information about setting rules, see "Working with the Rules Wizard" on page 81.

TIP The conditions and actions available in the Create Rule dialog box are just some of the ones you can use in Outlook. The Rules Wizard, which you access by clicking Rules on the Home tab on the ribbon and then clicking Manage Rules & Alerts on the drop-down menu, offers many additional conditions and actions for message-processing rules.

www.it-ebooks.info

Create a rule from scratch

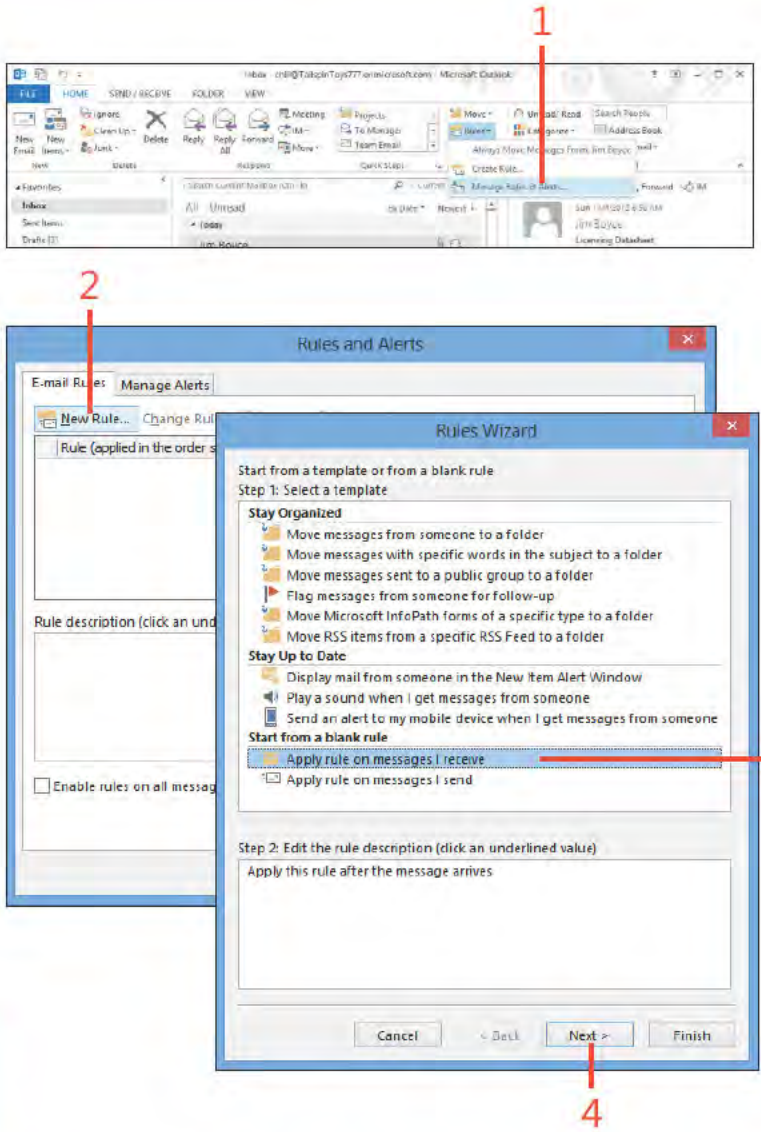
1 W th the Inbox fo der d sp ayed, on the Home tab, n the Move group, c ck Ru es On the drop-down menu that appears, c ck Manage Ru es & A erts

2 In the Ru es And A erts d a og box, c ck New Ru e

3 On the f rst page of the Ru es W zard, c ck App y Ru e On Messages I Rece ve under Start From A B ank Ru e

4 C ck Next

(continued on next page)



TRY THIS! To run rules manually, in the Rules And Alerts dialog box, click Run Rules Now. Select the rules you want to run and then click Run Now.

www.it-ebooks.info

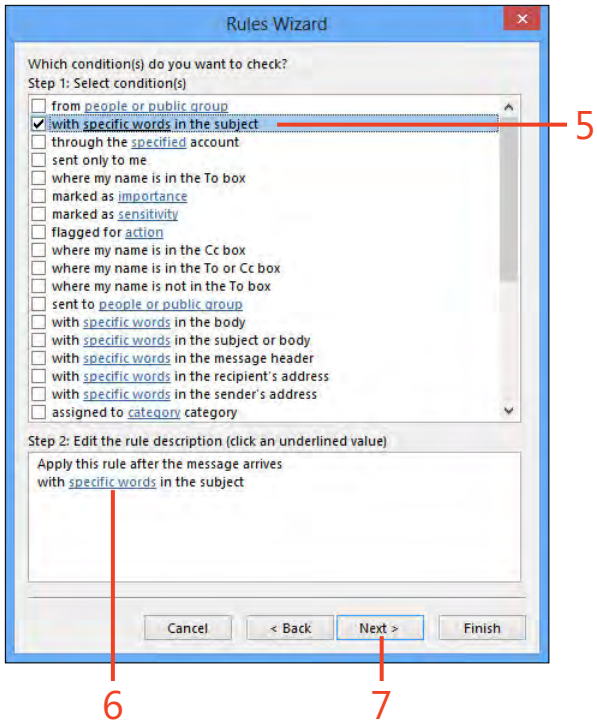
Create a rule from scratch *(continued)*

5 On the cond t ons page of the w zard, se ect the cond t on under wh ch you want the ru e app ed

6 If the cond t on requ res add t ona conf gurat on, c ck the nk n the Step 2 f e d and enter the nformat on

7 C ck Next

(continued on next page)



www.it-ebooks.info

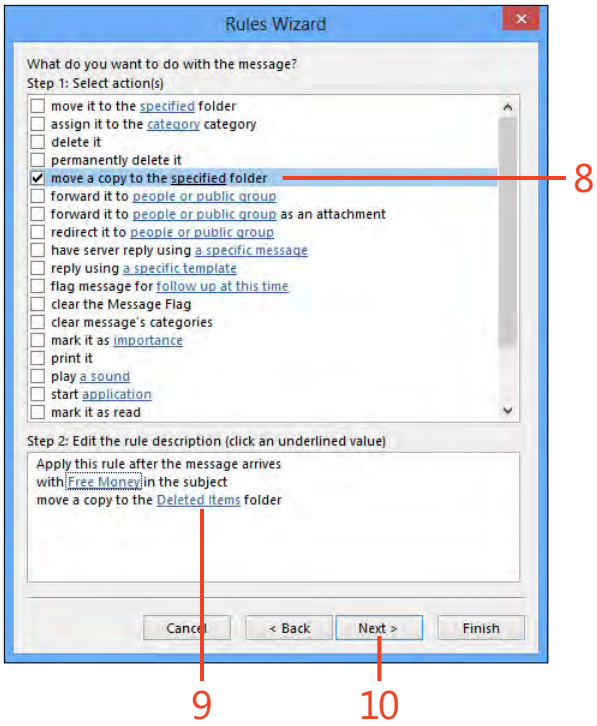
Create a rule from scratch *(continued)*

8 On the What Do You Want To Do W th The Message? page of the w zard, se ect what you want to do w th the message

9 If the act on requ res further conf gurat on, c ck the nk n the Step 2 f e d and enter the requ red nformat on

10 C ck Next

(continued on next page)



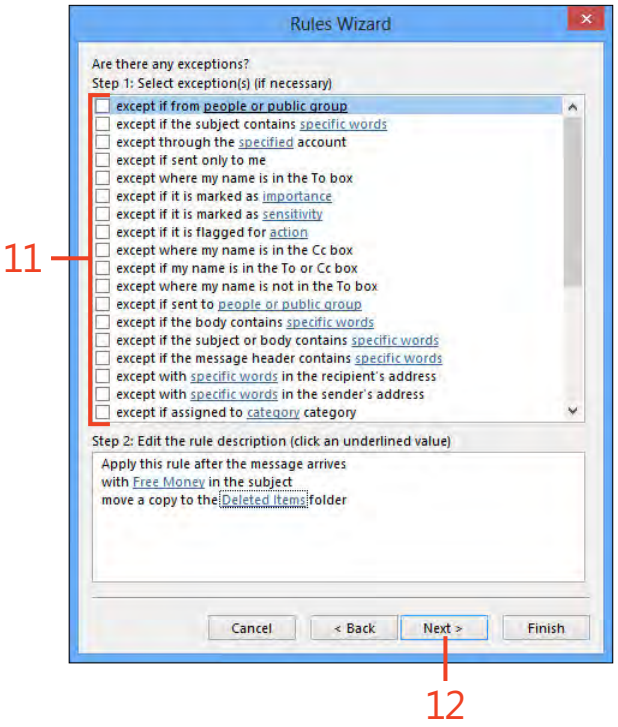
www.it-ebooks.info

Create a rule from scratch *(continued)*

11 On the except ons page of the w zard, se ect except ons to the ru e

12 C ck Next

(continued on next page)



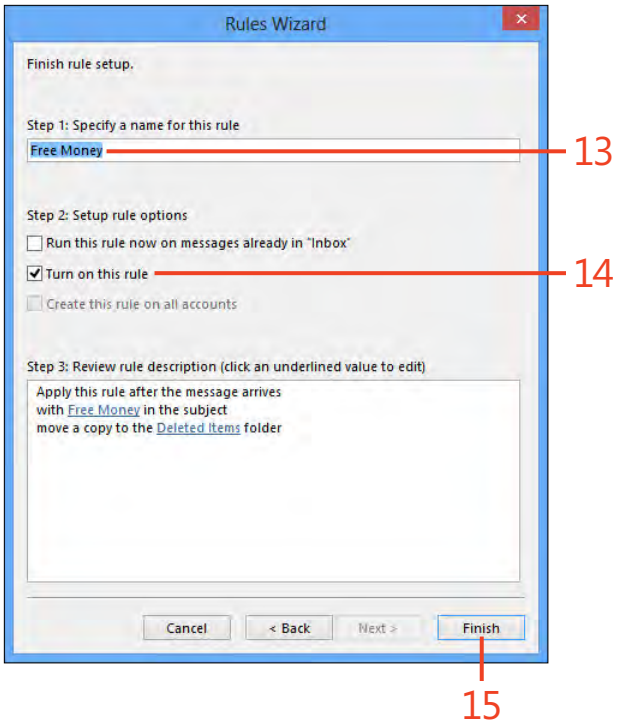
www.it-ebooks.info

Create a rule from scratch *(continued)*

13 On the F n sh page of the w zard, type a name for your ru e

14 Se ect the Turn On Th s Ru e check box

15 C ck F n sh



www.it-ebooks.info

Following up on a message

When you receive a message, you might not have the time or the information you need to reply to it right away. In such cases, you can flag a message to remind yourself to follow up on it later. You can designate different types of follow-up, including reminders to reply by email, to forward the message to a third party, or to reply by telephone.

Flag a message for follow-up

1 In the Inbox pane, r ght-c ck the message on wh ch you want to fo ow up

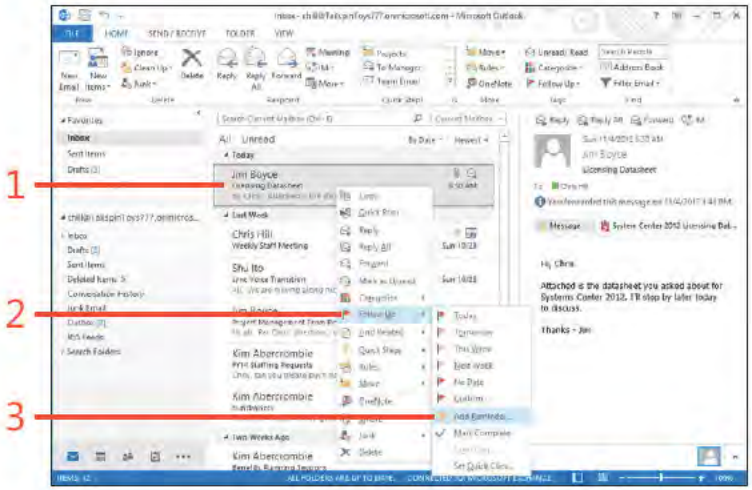
2 On the shortcut menu that appears, c ck Fo ow Up

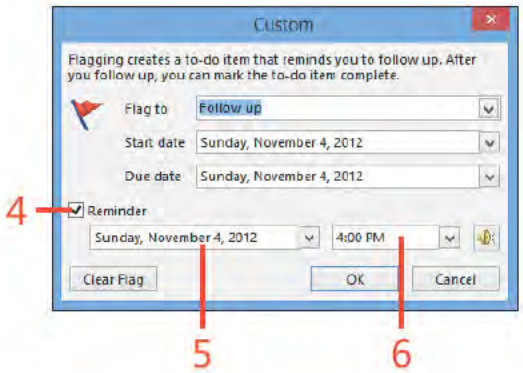
3 On the submenu that appears, c ck the fo ow-up act on, or c ck Add Rem nder to open the Custom d a og box

4 Se ect the Rem nder check box

5 Se ect a rem nder date

6 Set a t me for the rem nder, and then c ck OK





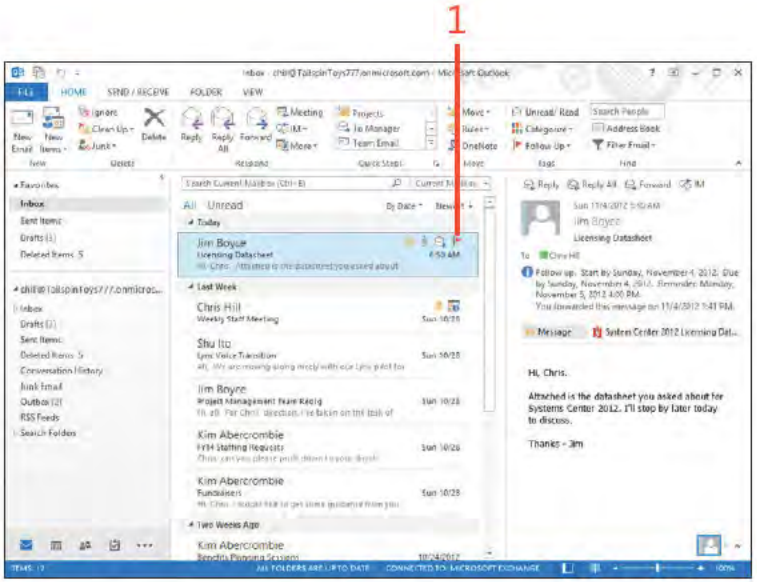
TRY THIS! In the Flag For Follow Up dialog box, set a flag that is due today at 30 minutes from the current time. When the time expires, Outlook displays a message prompting you to follow up on the message.

TIP A small flag appears next to any message that you flag.

www.it-ebooks.info

Set follow-up flag status

1 In the Inbox pane, c ck the fo ow-up f ag to c ear or set the f ag



SEE ALSO For information about replying to email messages, see "Replying to and forwarding email" on page 76.

TIP When you clear a follow-up flag, a clear flag appears next to the message subject. If you later determine that you want to set the flag again, right-click the message, choose Follow Up from the shortcut menu, clear the Mark Complete option, and then click OK.

www.it-ebooks.info

www.it-ebooks.info

Working with the People Hub

6

Staying in contact with others is part of life and an important task in business. Whether it's your best friend from high school, a client you've worked with for years, or a new customer, you need a way to store all the information about each one of them.

You can use the People Hub in Microsoft Outlook 2013 to save personal and business contact information, including phone numbers, addresses, email addresses, website information, and personal data. Not merely a glorified card file, the Contacts folder is a full-featured database that lets you use automatic dialing to call a contact, import data from other contact managers or databases (such as Microsoft Access), create new messages to send to a contact, set up contact groups for contacts, and more. The People Hub also integrates your social networking accounts from Facebook, LinkedIn, and other networking sites so that you can work with your contacts in those accounts, as well.

This section explores the Contacts folder. You learn how to create and sort contacts and use them for a variety of tasks. You learn how to add social networking accounts, send email messages to contacts, work with contacts in your address book, add files to a contact, and organize and manage contacts.

In this section:

- Working with social networking accounts and contacts
- Adding a new contact
- Inserting items into a contact record
- Viewing your contacts
- Viewing contact status and activities
- Finding a contact
- Organizing your contacts
- Customizing People Hub and contact views
- Communicating with contacts

www.it-ebooks.info

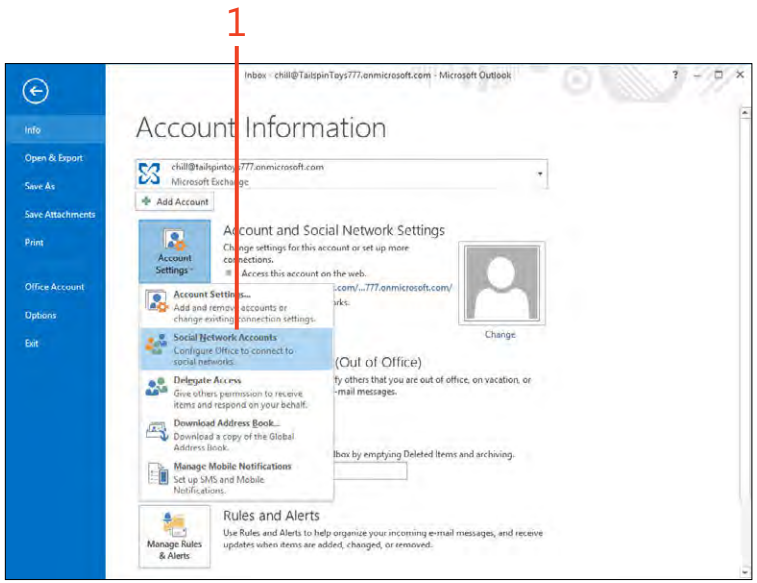
Working with social networking accounts and contacts

Outlook 2013 has built-in support for social networking accounts from Facebook, LinkedIn, and SharePoint. This capability is extensible, meaning developers for other social networking sites can build support for Outlook 2013. Adding a social networking account makes it possible for you you to work with your contacts from that account, such as your Facebook friends.

Add a social networking account

1 On the r bbon, c ck the F e tab to d sp ay the Backstage v ew, c ck Account Sett ngs and then, n the drop-down st that appears, choose Soc a Network Account

(continued on next page)



www.it-ebooks.info

Add a social networking account *(continued)*

2 In the Soc a Network Accounts d a og box, se ect the appropr ate check box for the account type you want to add

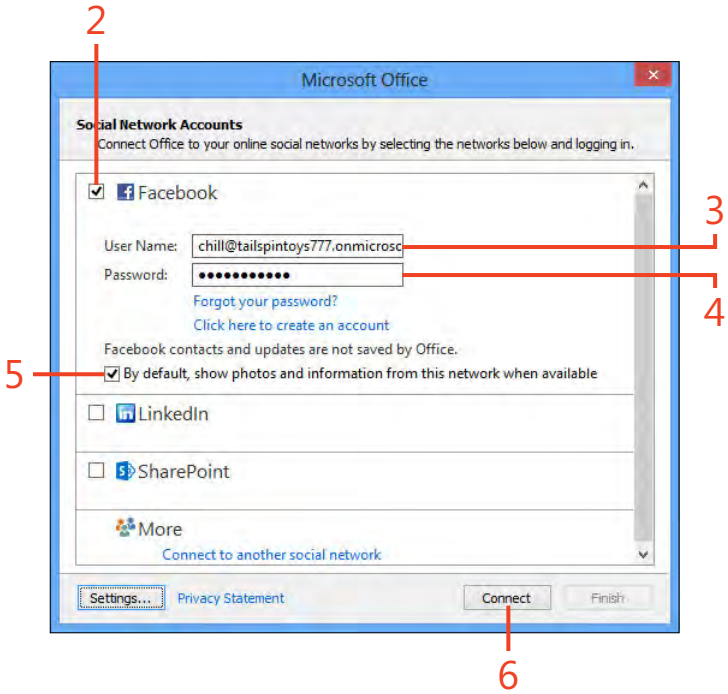
3 Type your user name for the soc a network ng serv ce

4 Type your password

5 Se ect the check box f you want to automat ca y show photos and other nformat on from the account n the Peop e Hub

6 C ck Connect

(continued on next page)

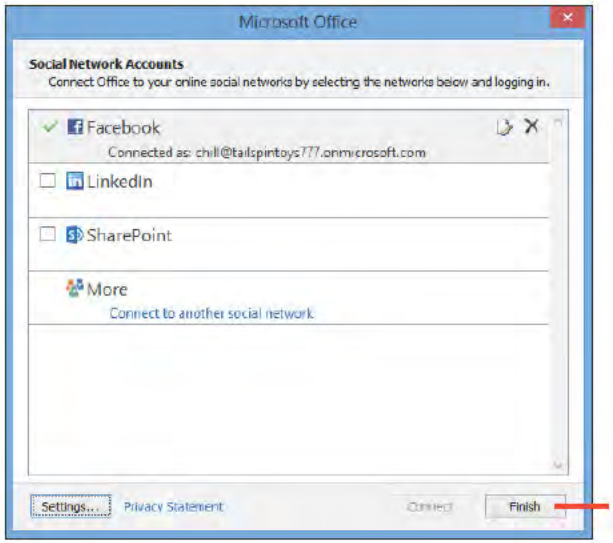


www.it-ebooks.info

Add a social networking account *(continued)*

7 C ck F n sh

8 C ck C ose



TIP After you add a Facebook account in Outlook, your Facebook friends will not automatically appear in Outlook. Instead, you must add a contact to Outlook using the same email address as the friend's Facebook account. After you add the contact, Outlook will sync the photo and other information from Facebook for that contact (subject to the permissions the friend has set on his data).

www.it-ebooks.info

Add a Facebook friend to the People Hub

1 At the bottom of the Fo der pane, c ck the Peop e con to open the Peop e Hub

2 On the r bbon, c ck the Home tab and then, n the New group, c ck New Contact

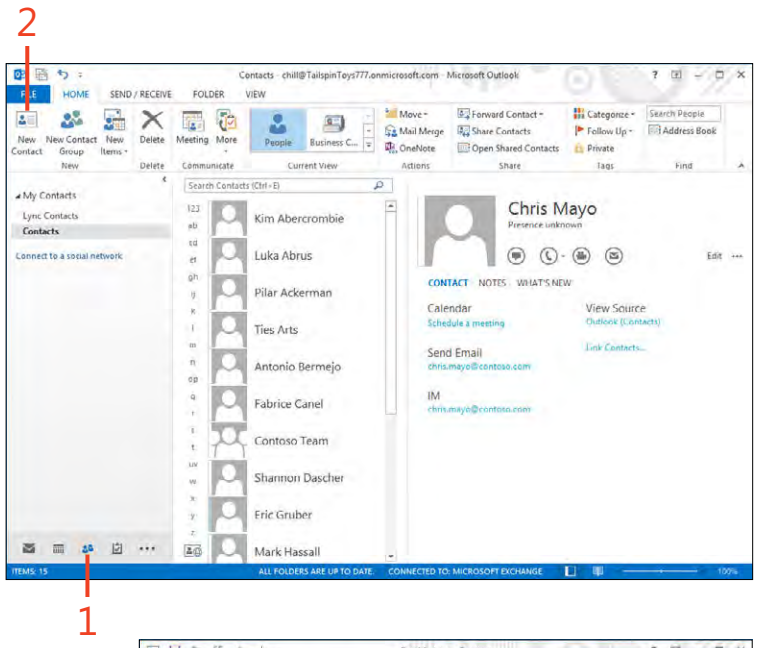
3 Enter the fr end's name

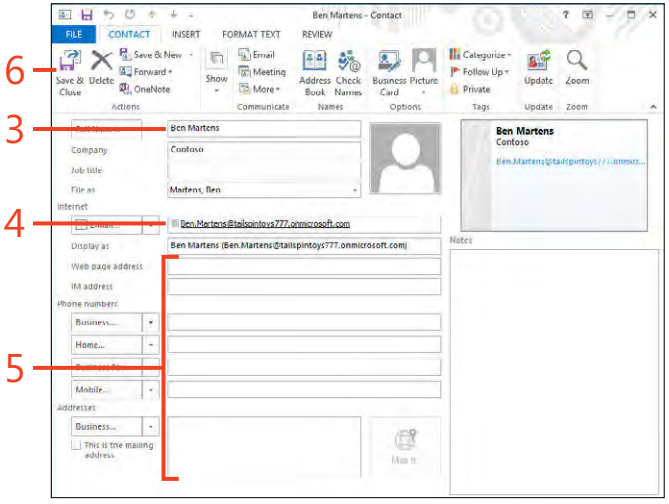
4 Enter the fr end's ema address that s assoc ated w th h s Facebook account

5 Add other nformat on as des red

6 On the r bbon, c ck the Contact tab and then c ck Save & C ose

(continued on next page)





www.it-ebooks.info

Add a Facebook friend to the People Hub *(continued)*

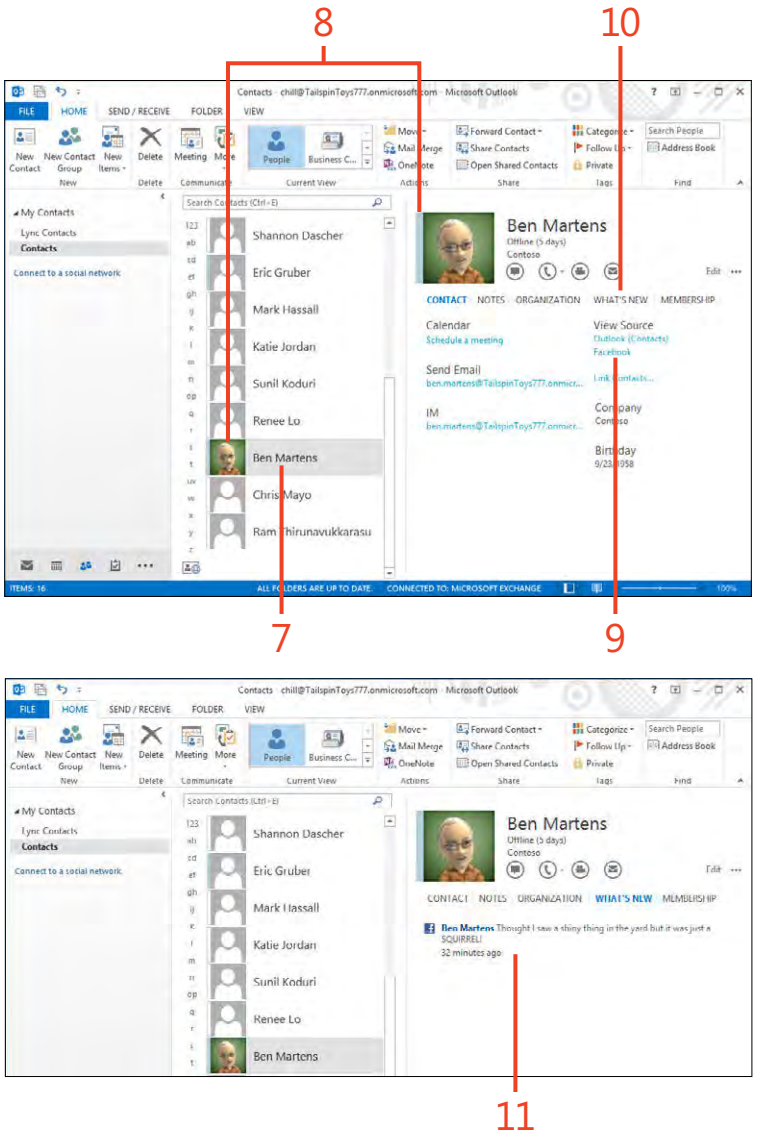
7 C ck the new y created contact

8 Note that the Facebook prof e p cture s added automat ca y

9 C ck the Facebook nk to open Facebook and v ew the fr end's prof e

10 C ck What's New

11 V ew the fr end's atest post on Facebook



www.it-ebooks.info

Adding a new contact

You can add contacts to Outlook's Contacts folder in three ways: by typing new information about someone into a Contacts form, by using information you've entered for another contact, or by using information from an email message. In the latter case, for example, you can quickly create a new contact by using the information from a message that you've received.

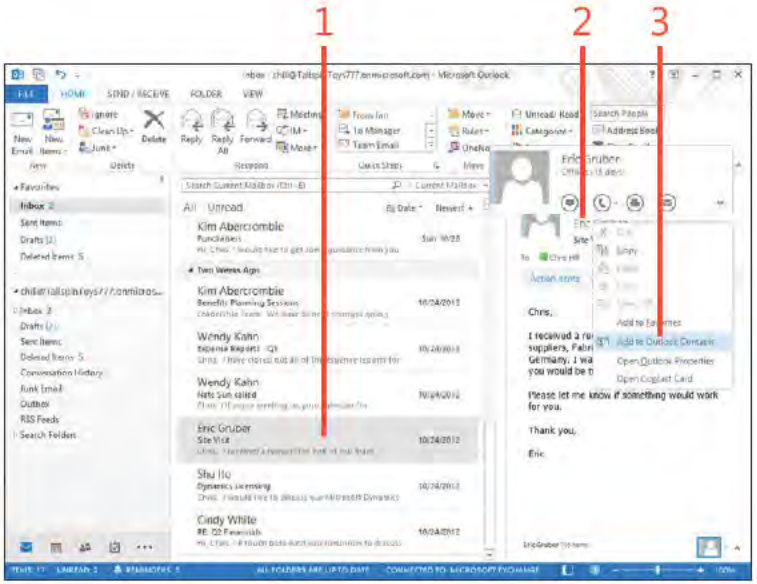
Create a contact from an email message

1 W th the Inbox show ng, se ect the message that has the contact nformat on that you want to save If you don't have the Read ng pane d sp ayed, open the message to access the From f e d

2 R ght-c ck the name or address that appears n the From f e d

3 On the shortcut menu that appears, c ck Add To Out ook Contacts

(continued on next page)



TIP Depending on how the From field is filled out in an email message, you might need to modify the Full Name field when you create a new contact from a mail message. For example, if the sender's name isn't complete or doesn't appear at all, you need to manually enter the information in the address card.

TIP If you want to keep the Inbox open and also open the People Hub, right-click People in the Folder pane and then, on the shortcut menu that appears, click Open In New Window.

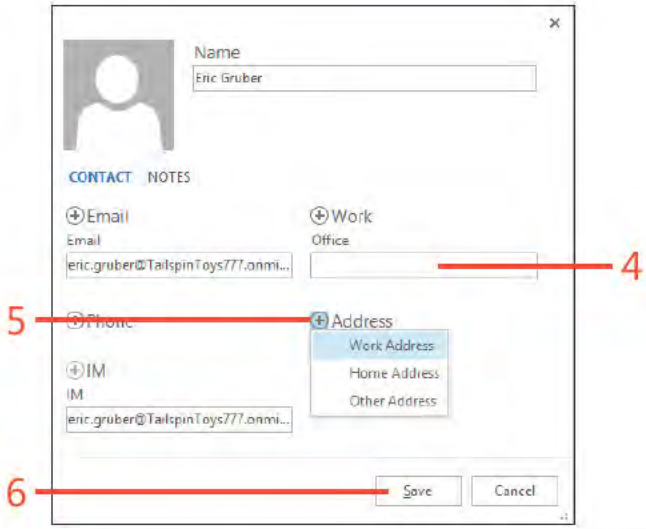
www.it-ebooks.info

Create a contact from an email message *(continued)*

4 Type the pert nent nformat on nto the rema n ng f e ds

5 If a f e d sn't v s b e, c ck the + button to choose the f e d you want to add

6 C ck the Save button to save the contact nformat on



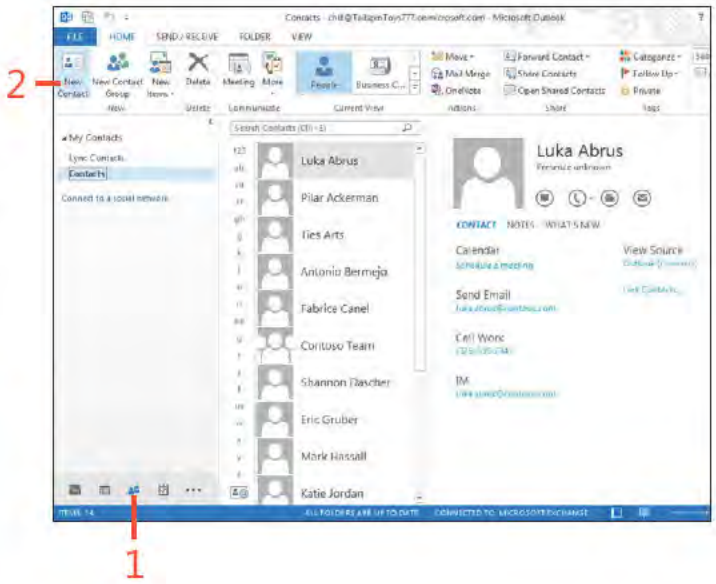
TIP To add other fields not shown in the form or to modify other information for the contact, double-click a contact to open the contact form, where the additional fields are available for editing.

Use the contact form

1 At the bottom of the Fo der pane, c ck the Peop e con to d sp ay the Peop e Hub

2 On the r bbon, c ck the Home tab and then, n the New group, c ck the New Contact button

(continued on next page)



CAUTION When you type a contact's email address, be sure you type it correctly. An incorrect address prevents your messages from being sent successfully. Take the time to double-check your spelling of an email address. You can change it later, but it's best to ensure that it's correct now.

www.it-ebooks.info

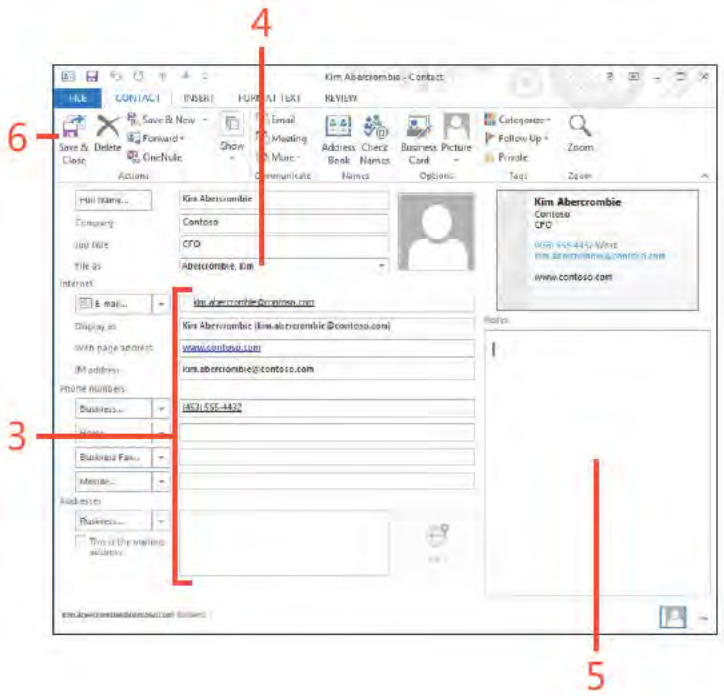
Use the contact form *(continued)*

3 Type nformat on about your contact n the appropr ate f e ds

4 From the F e As drop-down st, se ect one of the ways n wh ch Out ook can d sp ay the contact's name, such as ast name f rst, f rst name ast, and so on

5 Type any add t ona usefu nformat on n the Notes box at the bottom of the address card

6 On the r bbon, c ck the Contact tab and then c ck Save & C ose to save your changes



TIP To ensure that Outlook can dial the phone number for a contact, type phone numbers as numbers; don't use acronyms or letters.

TIP If the contact already exists in your Contacts folder, Outlook asks whether you want to update the information in the existing contact with the new information.

www.it-ebooks.info

Inserting items into a contact record

You can add Outlook 2013 items, application and document objects, and files to a contact by using the Outlook Item button on the Insert tab on the ribbon. For example, you can add an email message to a contact for future reference, insert an attachment, or insert a Microsoft Excel worksheet. You can then access these items from the contact card. You can add a new, empty item and then modify it right in the Outlook item, or you can insert an existing document.

Add an Outlook item

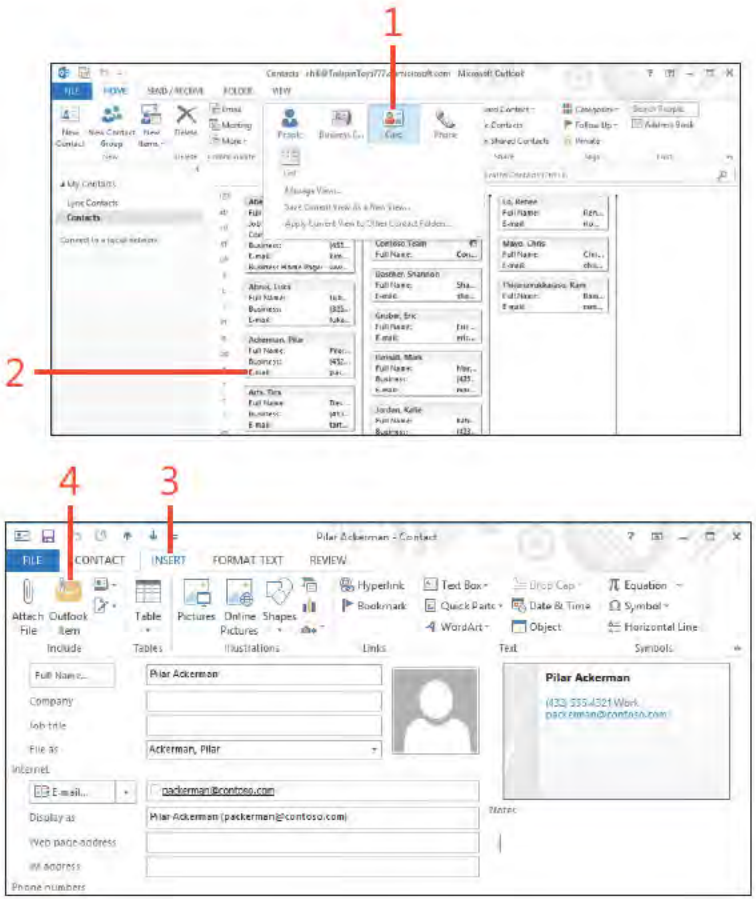
1 Open the Peop e Hub and choose any v ew other than Peop e

2 Open the contact n wh ch you want to nsert an tem

3 On the r bbon, c ck the Insert tab

4 In the Inc ude group, c ck Out ook Item

(continued on next page)



SEE ALSO For more information about Outlook items, see "Working with Outlook items" on page 25.

www.it-ebooks.info

Add an Outlook item *(continued)*

5 In the Insert Item d a og box, c ck the Out ook fo der n wh ch the tem you want to nsert s ocated

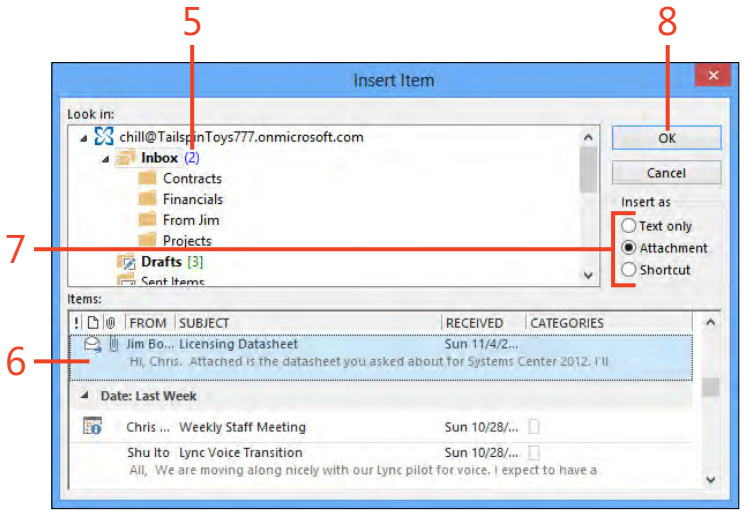
6 Se ect an tem n the Items st

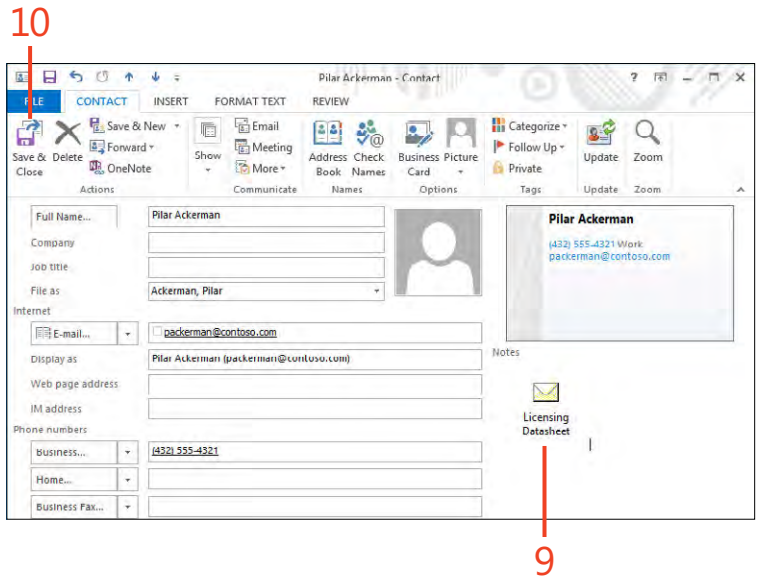
7 Se ect the format of the tem Text On y, Attachment, or Shortcut

8 C ck OK to nsert the tem nto the contact tem

9 The tem now appears w th the contact

10 On the r bbon, c ck the Contact tab and then c ck Save & C ose





www.it-ebooks.info

Add a file

1 Open a contact and then, on the r bbon, c ck the Insert tab

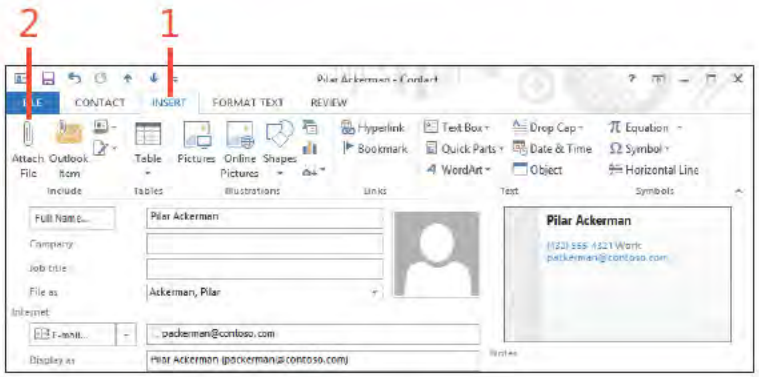
2 In the Inc ude group, c ck the Attach F e button

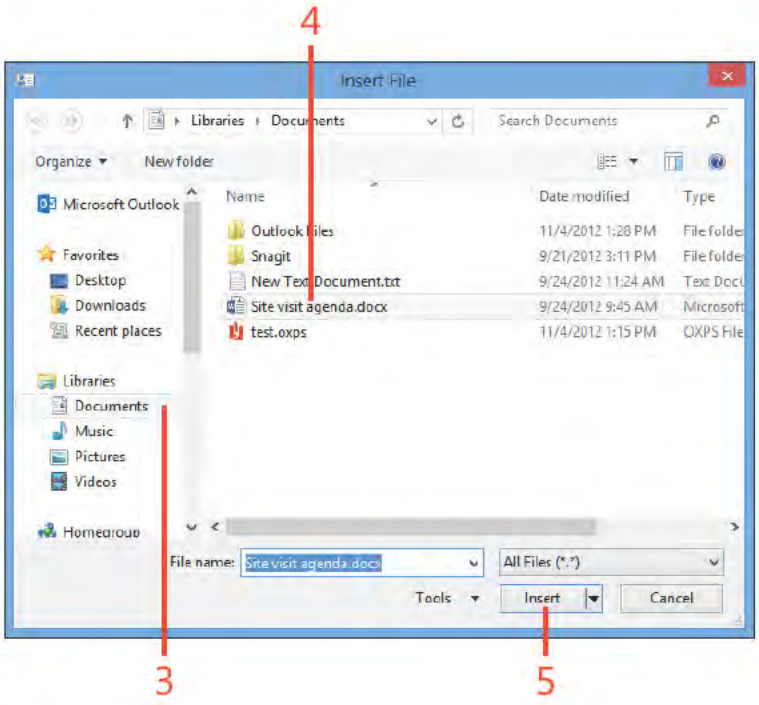
3 In the Insert Item d a og box, se ect the fo der n wh ch the f e you want to nsert s ocated

4 Se ect the f e that you want to nsert

5 C ck Insert

(continued on next page)





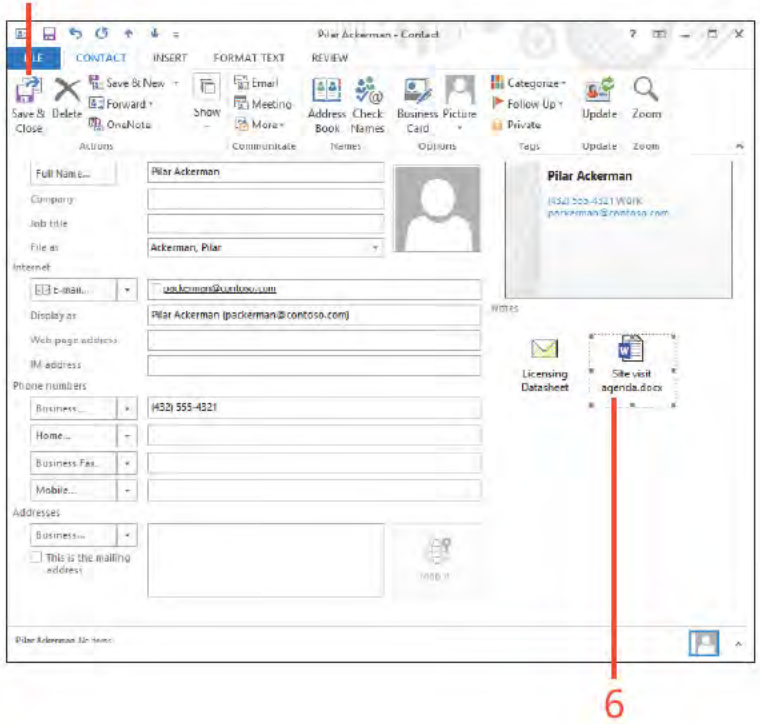
TRY THIS! To remove a file from a contact, click the file and press Delete.

www.it-ebooks.info

Add a file *(continued)*

6 The f e now appears w th the contact

7 On the r bbon, c ck the Contact tab and then c ck Save & C ose



TIP After you insert a file into a contact's card, you can open it to view, edit, or print it. To do this, double-click the file's icon in the contact item to launch the file within its associated application. Note that this edits the file embedded in the contact, not the original file.

CAUTION As you add items, files, and objects to a contact, the size of that contact card increases. When you add several items, files, or objects to a contact, it takes longer for Outlook to open the contact. You should limit the number of attachments you add to a contact. To conserve space, you can insert links instead of items.

www.it-ebooks.info

Viewing your contacts

You can view your Outlook 2013 contacts as a series of single address cards, or you can view them all at once, moving through your Contacts folder as if it were an electronic phone book or address book. Another way to look at your contact information is through the Outlook Address Book, which lists contacts alphabetically.

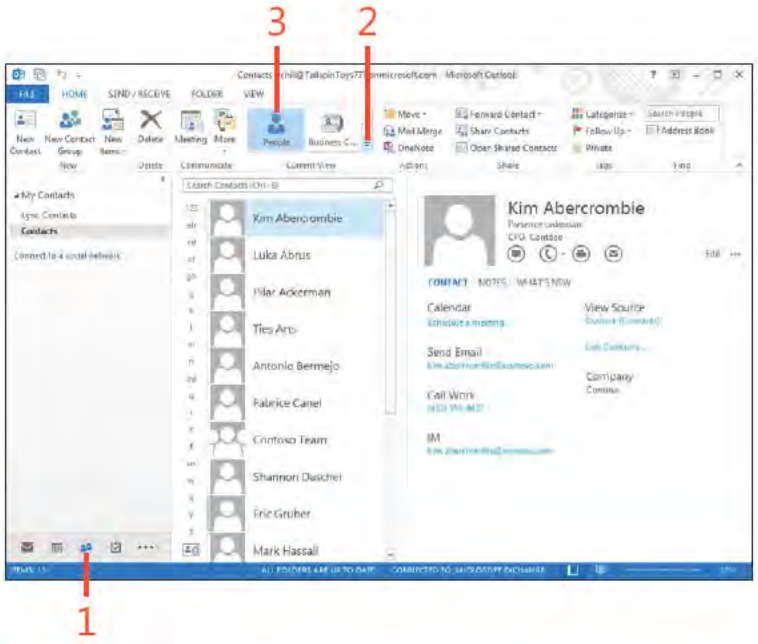
Choose a view of the People Hub

1 At the bottom of the Fo der pane, c ck the Peop e con

2 On the r bbon, c ck the Home tab In the Current V ew group, c ck More f the v ew you want sn't shown

3 Se ect the v ew type you want to use to v ew the contact nforma- t on n the Contacts fo der You can choose from the fo ow ng st

- Peop e
- Bus ness Card
- Card
- Phone
- L st



SEE ALSO One task that no one wants to face is typing in all their contacts a second time. This is why it's a good idea to set up a backup schedule to ensure that your contacts are backed up on a regular basis. For information about backing up and restoring Outlook Contacts, see "Backing up and restoring a data file" on page 237.

TRY THIS! To see how Outlook displays your contact information in different formats, select each of the views in the Change View drop-down list. When you see one that you like, such as the Phone view, keep it so that the next time you open the Contacts folder that view is showing.

www.it-ebooks.info

View contacts in the Address Book

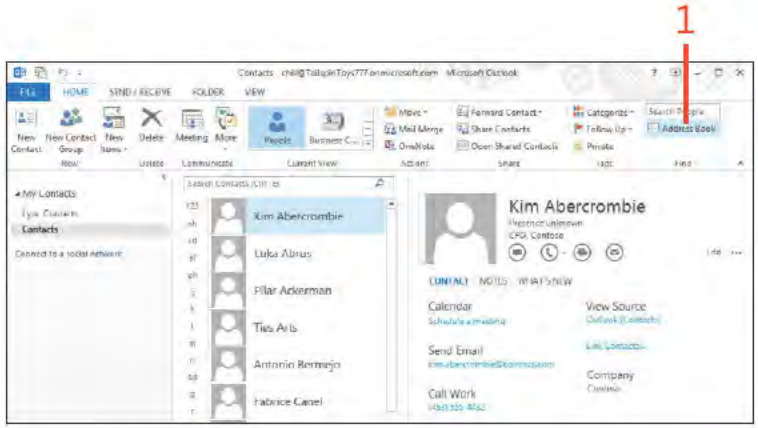
1 On the r bbon, c ck the Home tab and then, n the F nd group, c ck Address Book

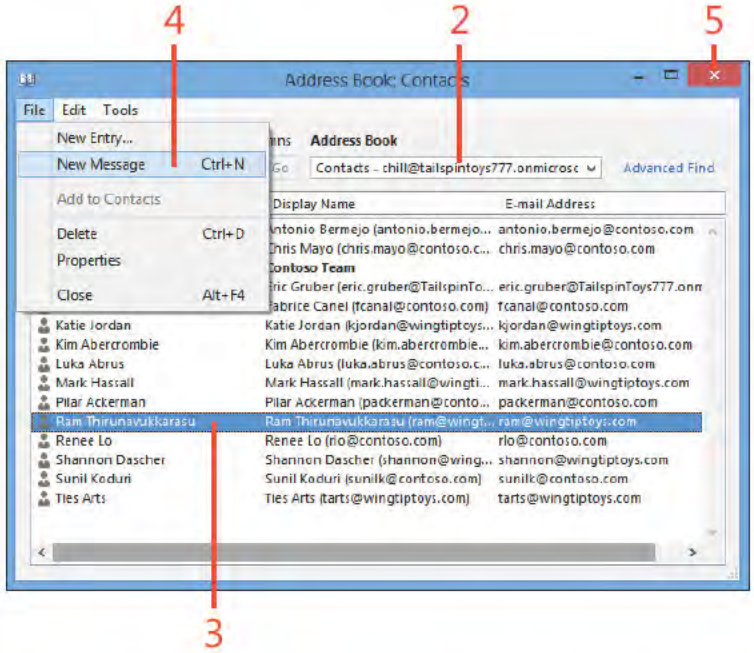
2 In the Address Books d a og box, c ck the Address Book drop-down st and choose Contacts

3 V ew or se ect contacts

4 If des red, on the F e menu, c ck the New Message command to start a new ema addressed to the se ected contact

5 C ose the Address Book when you're f n shed work ng w th your contacts





SEE ALSO You can also use the Address Book to add and modify contact information. See "Working with the Address Book" on page 38 for details.

TIP You can add contact groups to the Contacts folder by using the Address Book. Rather than clicking New Contact in the Select The Entry Type dialog box, click New Contact Group. The new contact group appears in the Contacts folder alongside individual entries.

www.it-ebooks.info

Viewing contact status and activities

After you create a contact in Outlook 2013, you can view it in the People Hub or open it in its own contact form. In the People Hub, you can see the contact's name, company, title, selected phone information, email address, and selected other information. To see a contact's full set of information, you must display the contact form. For contacts that have associated social networking accounts or information feeds from Facebook, LinkedIn, or SharePoint, you can also view status and activity information.

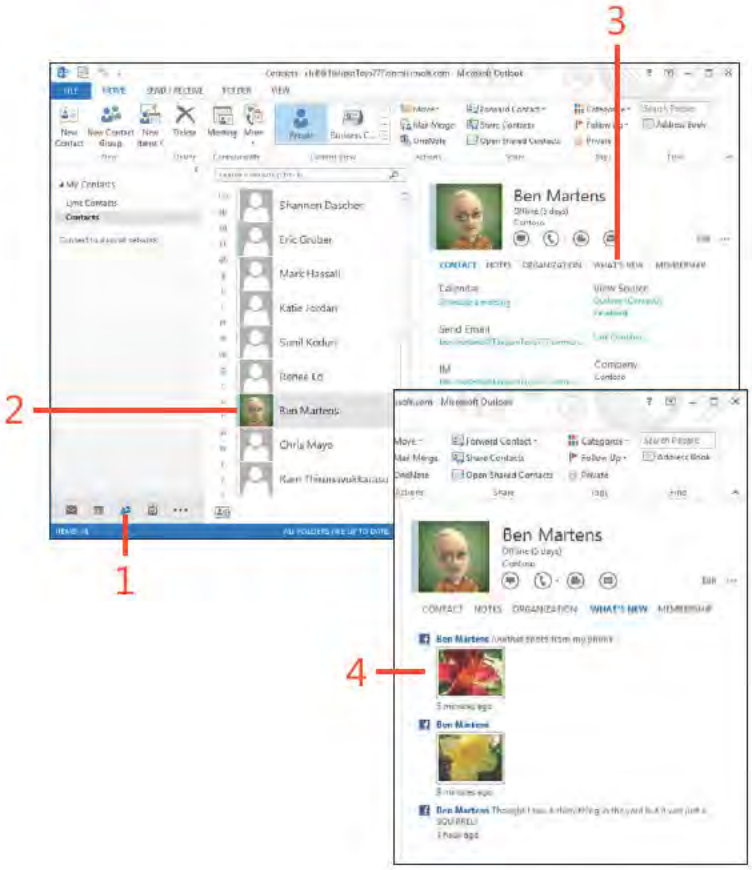
View social network feeds and status

1 At the bottom of the Fo der pane, c ck the Peop e con to open the Peop e Hub

2 Se ect a contact that has an assoc ated soc a network account

3 In the Read ng pane, c ck What's New

4 V ew the news feed content for the contact



www.it-ebooks.info

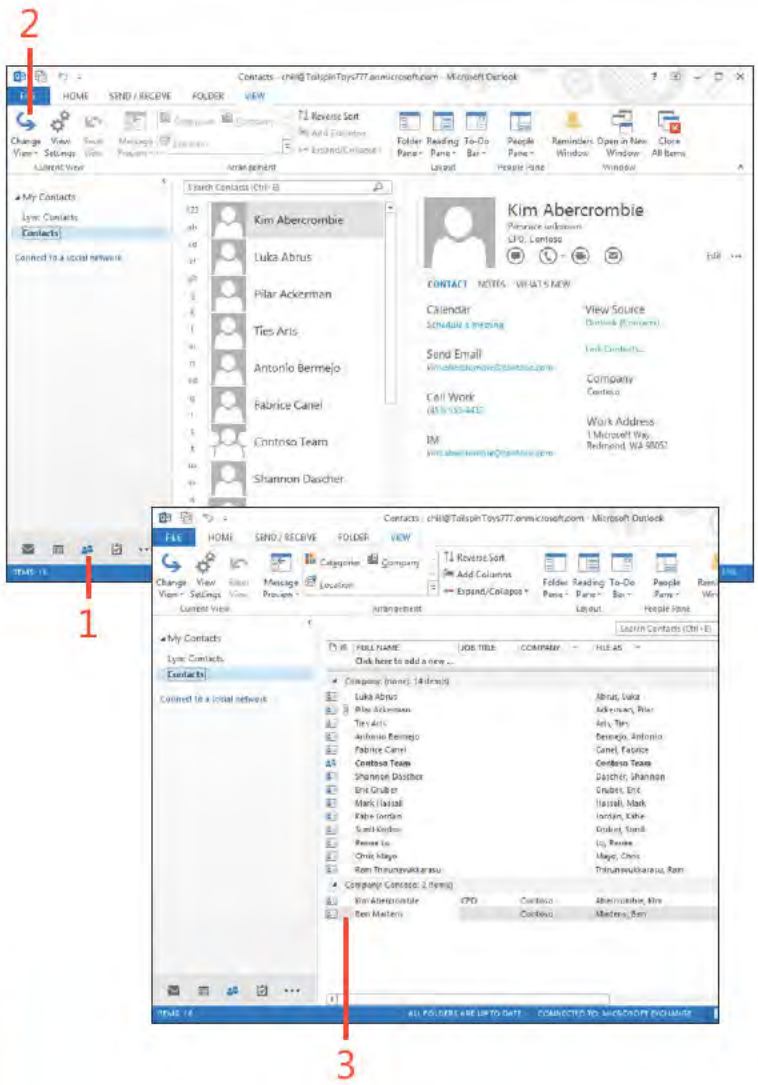
Use the Activities tab

1 At the bottom of the Fo der pane, c ck the Peop e con to open the Peop e Hub

2 On the r bbon, c ck the V ew tab and then, n the Current V ew group, c ck the Change V ew button to choose a v ew other than the Peop e v ew

3 Doub e-c ck the contact name that you want to v ew

(continued on next page)



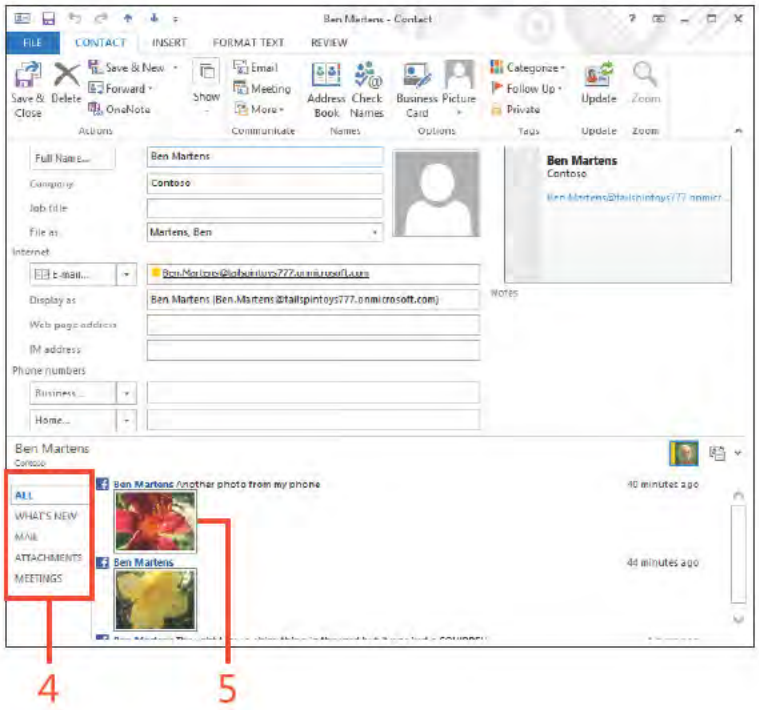
TIP The People pane must be open to show activities. If you don't see the list of activity categories, click the small up-arrow near the lower-right corner of the contact form to expand the People pane.

www.it-ebooks.info

Use the Activities tab *(continued)*

4 C ck to se ect the type of act v t es that you want to v ew

5 C ck or doub e-c ck to open an tem (depend ng on ts type)



SEE ALSO For information about using contacts in email messages, see "Writing and sending email" on page 35.

TIP When you view contacts using the People, Business Card, or Address Cards views, you can click the letter buttons on the left side of the window to jump to contacts whose names start with that letter. For example, click the letter *m* to jump to contacts with the last names Mitchell, Mosley, and so on.

www.it-ebooks.info

Finding a contact

You can search for contacts in Outlook 2013 by using Instant Search or the Find A Contact box—or simply by scrolling through the list of your contacts. You don't even have to know the complete name of the person you are looking for in Outlook because searching for part of a name brings up any name that matches that string.

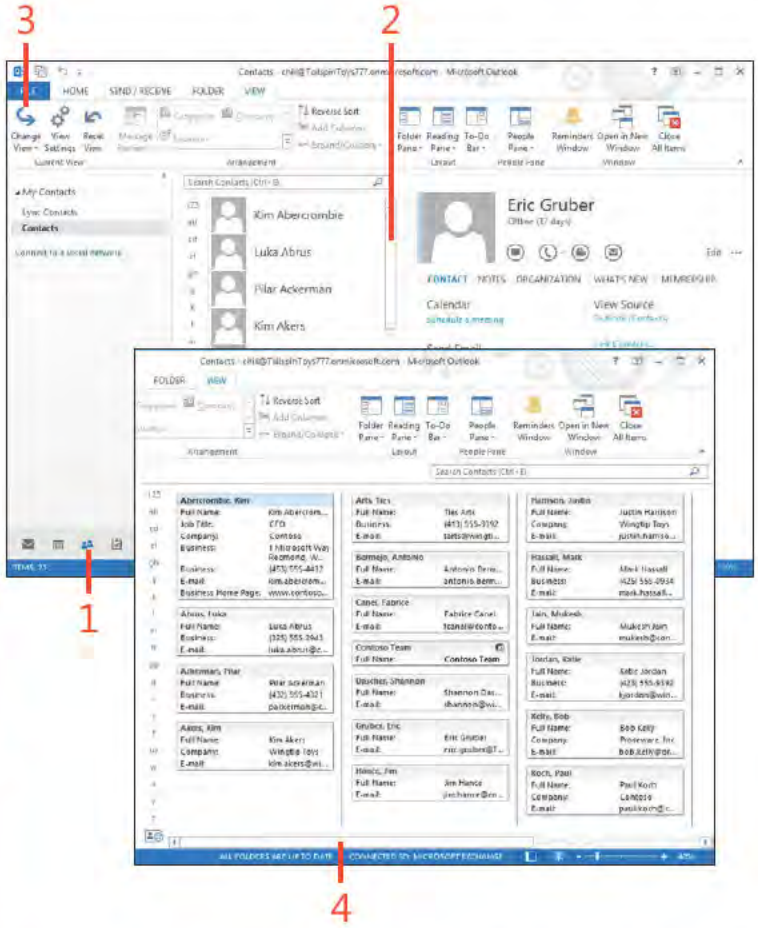
Scroll through the Contacts folder

1 At the bottom of the Fo der pane, c ck the Peop e con to open the Peop e Hub

2 In the Peop e and Bus ness Card v ews, use the scro bar at the r ght s de of the contact st to v ew other contacts

3 On the r bbon, c ck the V ew tab and then, n the Current V ew group, c ck the Change V ew button to choose the Card v ew

4 Move the scro bar at the bottom of the w ndow to scro through your contacts



TIP If you press Delete after clicking a contact, you delete the contact. If this happens, press Ctrl+Z to undo the deletion.

TIP If your Contacts folder is really large, scrolling through the list of contacts isn't the most efficient way to locate a contact. Instead, use the Find A Contact box or Instant Search to locate the contact.

www.it-ebooks.info

Use Instant Search

1 At the bottom of the Fo der pane, c ck the Peop e con to open the Peop e Hub

2 C ck n the Search box

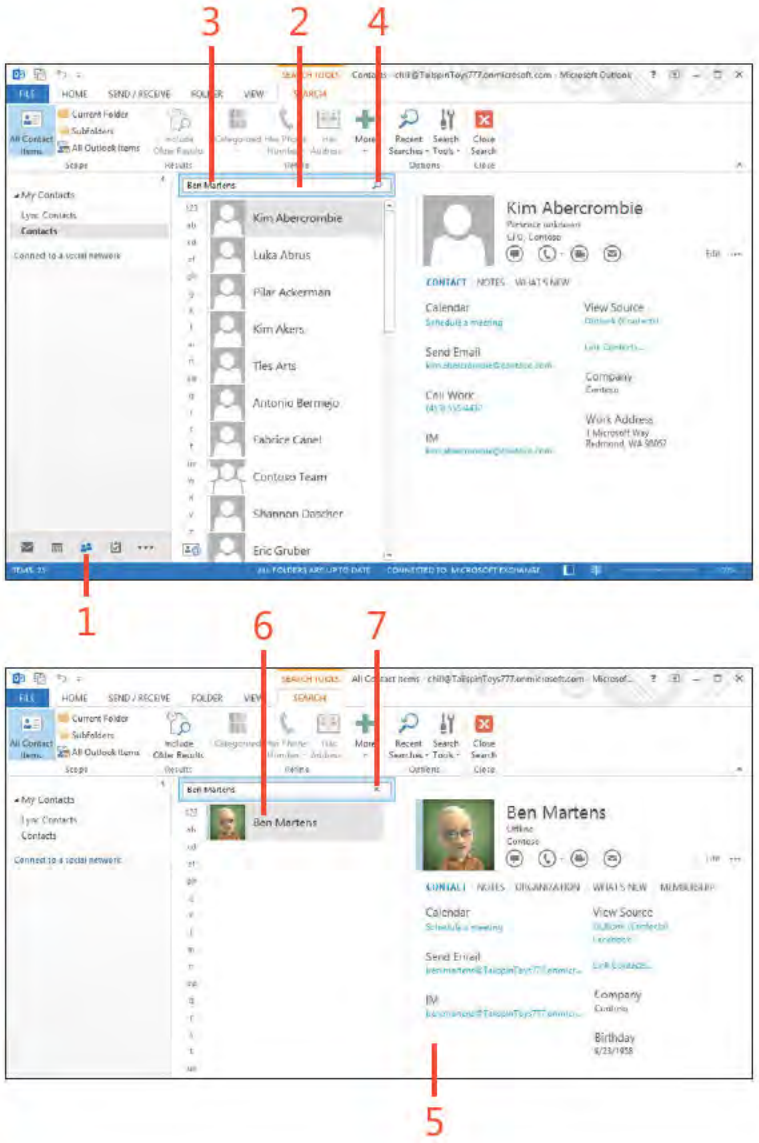
3 Type the name of the contact that you want to f nd

4 C ck the Search button

5 V ew the contact

6 Doub e-c ck the contact to open t

7 C ck X to c ear the search



SEE ALSO For information about finding names in the Address Book, see "Find a name in the Address Book" on page 39.

TIP You don't have to click the Search button to see results. By default, Outlook is configured to show results as you type. You can turn this behavior on or off through Outlook's search options.

www.it-ebooks.info

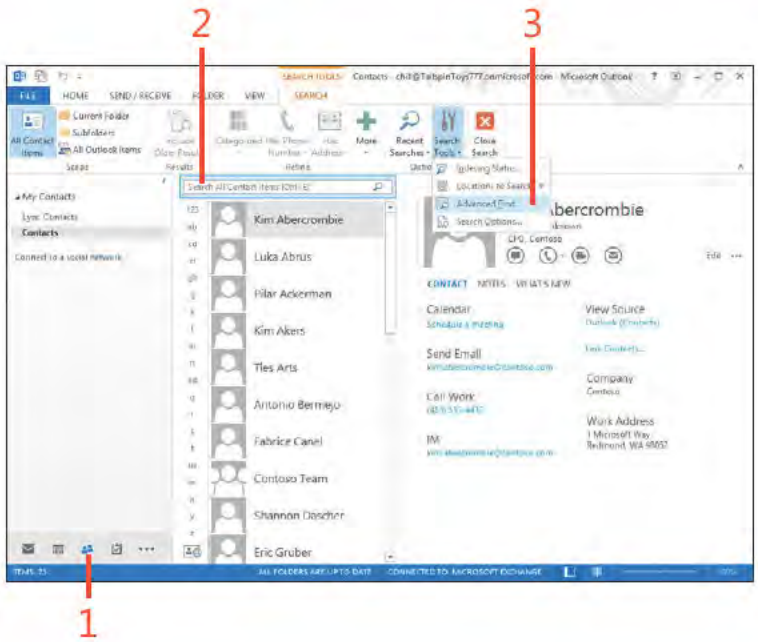
Use the Advanced Find dialog box

1 At the bottom of the Fo der pane, c ck the Peop e con to open the Peop e Hub

2 C ck n the Search box to d sp ay the Search Too s Search contextua tab on the r bbon

3 In the Opt ons group, c ck the Search Too s button and then, on the drop-down menu that appears, c ck Advanced F nd

(continued on next page)



TIP Click New Search to clear your search results so that you can begin a new one. Click OK when the prompt informs you that beginning a new search loses the results of the previous search. You can also use the Advanced Find dialog box to find contacts by using a number of search criteria. For example, you can search for contacts who have a specific email address or domain name in the email address. This is handy if you know that a contact has a domain name of @tailspintoys.com but aren't sure of her name or complete email address. Simply type **@tailspintoys.com** in the E-Mail field, and press Enter.

www.it-ebooks.info

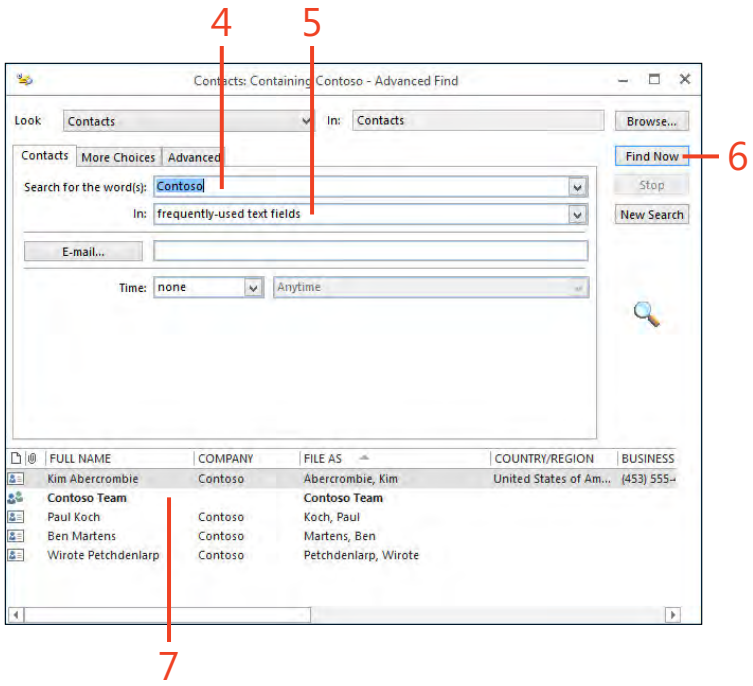
Use the Advanced Find dialog box *(continued)*

4 In the Advanced F nd d a og box, type a word or phrase n the Search For The Word(s) f e d

5 Se ect the f e ds n wh ch to search

6 C ck F nd Now to search for contacts match ng the search cr ter a

7 V ew the resu ts of the search



www.it-ebooks.info

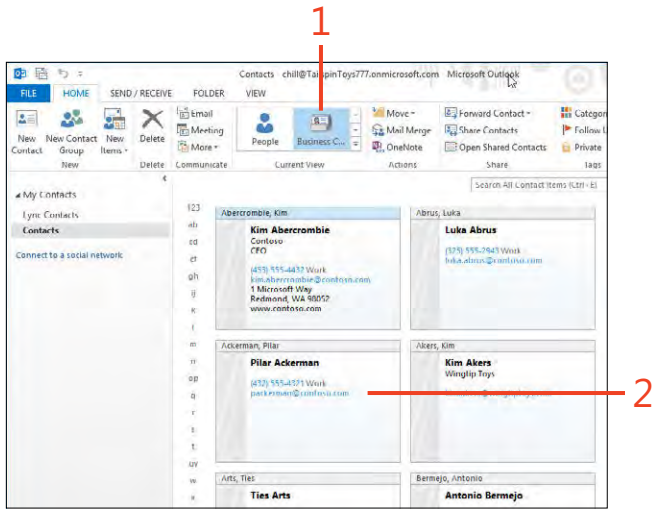
Map a contact

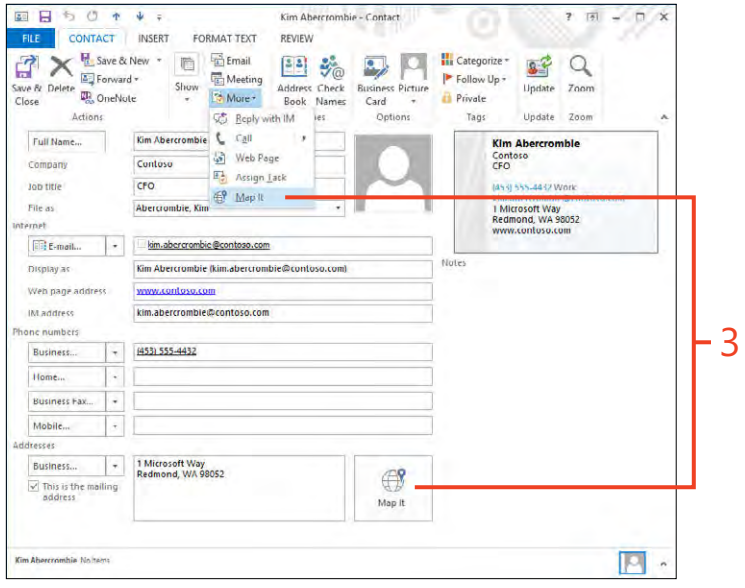
1 At the bottom of the Fo der pane, c ck the Peop e con to open the Peop e Hub On the r bbon, c ck the Home tab and then, n the Current V ew group, c ck the Card or Bus ness Card v ew

2 Doub e-c ck the contact for wh ch you want to d sp ay a map

3 On the r bbon, c ck the Contact tab and then, n the Commun cate group, c ck More and then c ck Map It Or, c ck the Map It button to the r ght of the address f e d on the contact form

(continued on next page)

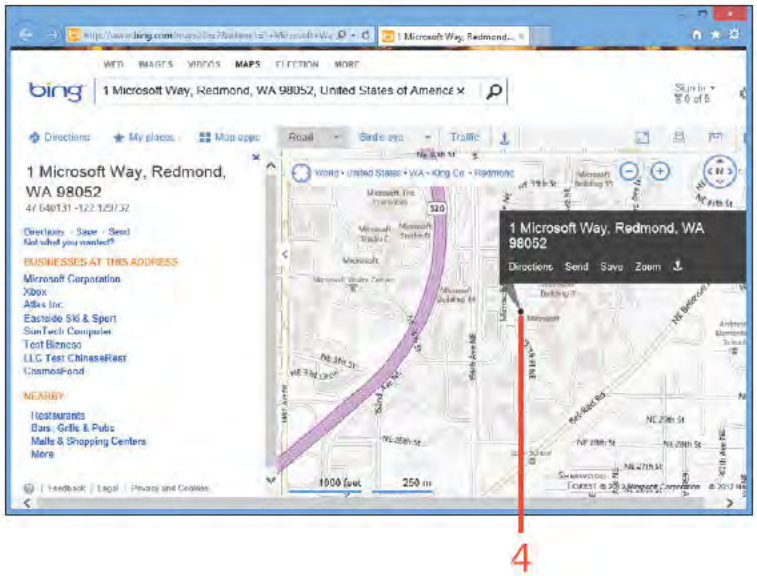




www.it-ebooks.info

Map a contact *(continued)*

4 V ew the map n your web browser



TIP To see a map for an address, you must have Internet access.

CAUTION Not all addresses are available from the Bing website. If you can't find the address you're looking for, modify the information you enter on the search webpage. Click the Search button to begin the search again.

www.it-ebooks.info

Organizing your contacts

When you have only a few dozen or so contacts, finding and managing them is fairly easy. You can simply open the People Hub, scroll through the list, and find what you're looking for. However, after the Contacts folder grows, you need to organize your contacts to make them easier to find and update. Outlook 2013 gives you three ways to organize your contacts: you can use folders to store related contacts, use categories to set up relationships between contacts, or use views to sort contacts in ways that make sense to you.

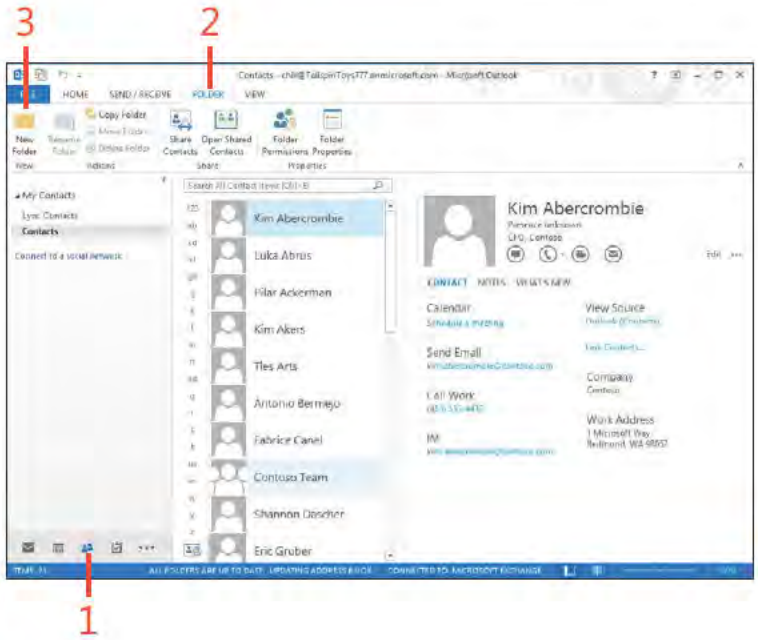
Use folders

1 At the bottom of the Fo der pane, c ck the Peop e con to open the Peop e Hub

2 C ck the Fo der tab

3 C ck New Fo der

(continued on next page)


3
2
HOME
SEND / RECEIVE
FOLDER
VIEW
Kim Abercrombie
Luka Abrus
Pilar Ackerman
Kim Akers
Tles Arts
Antonio Bermejo
Fabrice Canel
Contoso Team
Shannon Dascher
Eric Gruber
Calendar
Send Email
Call Work
Work Address
1
TRY THIS! After you create a folder for contacts, you can drag existing contacts to your new folder to organize them as necessary. For example, create a folder named "Project Team" in the Contacts folder. Open the Folder List in the folder pane so that you can see the new folder, but keep the focus on the Contacts folder. Drag members from your project team into the Project Team folder. You now can quickly see who is on your team by clicking this folder.

www.it-ebooks.info

Use folders *(continued)*

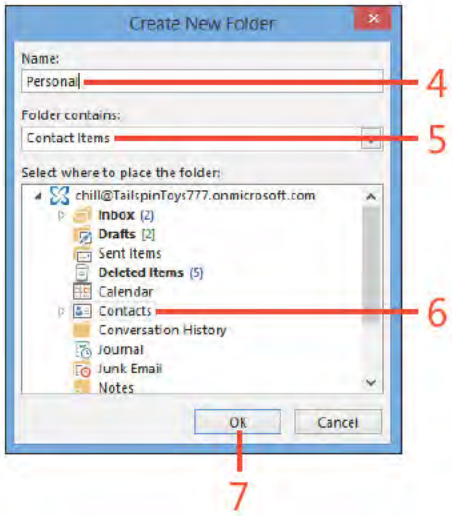
4 In the Create A New Fo der d a og box, type a name for the fo der n the Name f e d

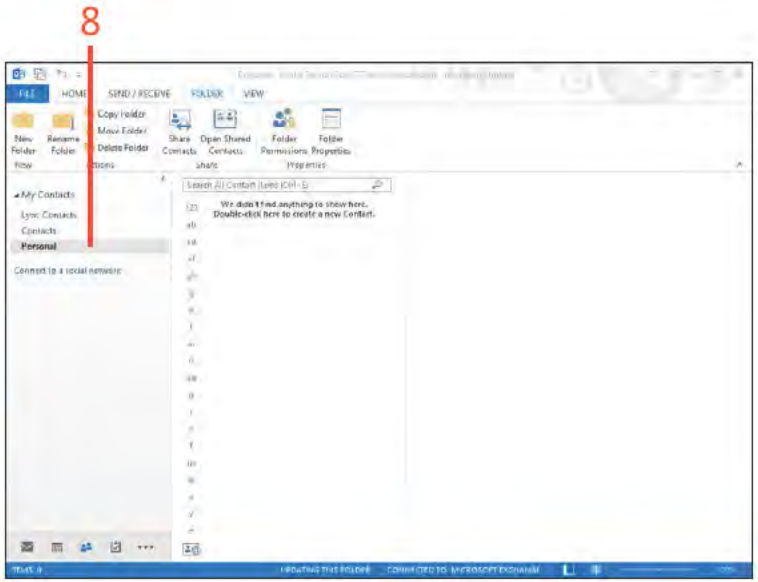
5 C ck the Fo der Conta ns drop-down st and se ect Contact Items

6 Choose the parent fo der where the new fo der w be created

7 C ck OK

8 In the Fo der pane, c ck the fo der to v ew the new y created fo der





CAUTION When you create a new folder for contacts, ensure the Contact Items option is selected in the Folder Contains drop-down list.

TIP Your new contacts folder appears in the My Contacts area of the folder pane when you're in Contacts. You don't have to open the Folder List to access the additional contacts folders.

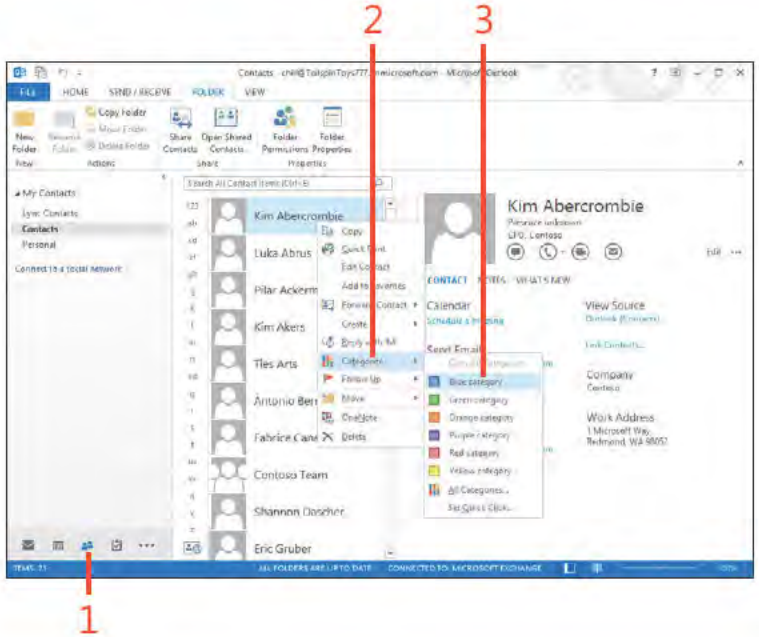
www.it-ebooks.info

Use categories

1 At the bottom of the Fo der pane, c ck the Peop e con to open the Peop e Hub

2 R ght-c ck a contact and then, on the shortcut menu that appears, c ck Categor ze

3 Se ect the category to wh ch you want the contact to be ong



SEE ALSO For more information about Outlook Categories, see "Using categories" on page 212.

TIP You can add your own categories and modify existing ones. Choose Categorize from the Tags group on the Home tab and then choose All Categories to open the Color Categories dialog box, where you can add and modify categories.

www.it-ebooks.info

Customizing People Hub and contact views

Outlook 2013 includes five different views of the People Hub. Each of these views gives you a different way to view your contacts. For example, the People view gives you a consolidated look at a contact's information, including data from social networking services such as Facebook, using a simplified form. The Card view displays your contacts as business cards and enables you to open the full contact item form. You can modify properties for each of these views to tailor the view to your needs.

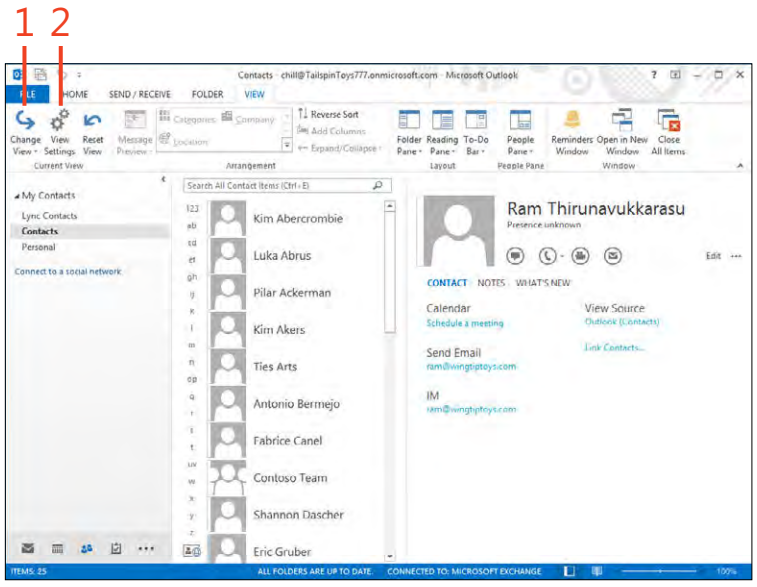
Some views facilitate more customization than others, but the general process is the same. Common ways in which you can customize a view include adding a filter to define which contacts appear in the view, adding or removing fields, setting font characteristics, and using conditional formatting to make contacts appear with different fonts and colors, depending on criteria you specify.

Filter a view

1 In the Peop e Hub, d sp ay the v ew that you want to custom ze

2 On the V ew tab, n the Current V ew group, c ck V ew Sett ngs

(continued on next page)



www.it-ebooks.info

Filter a view *(continued)*

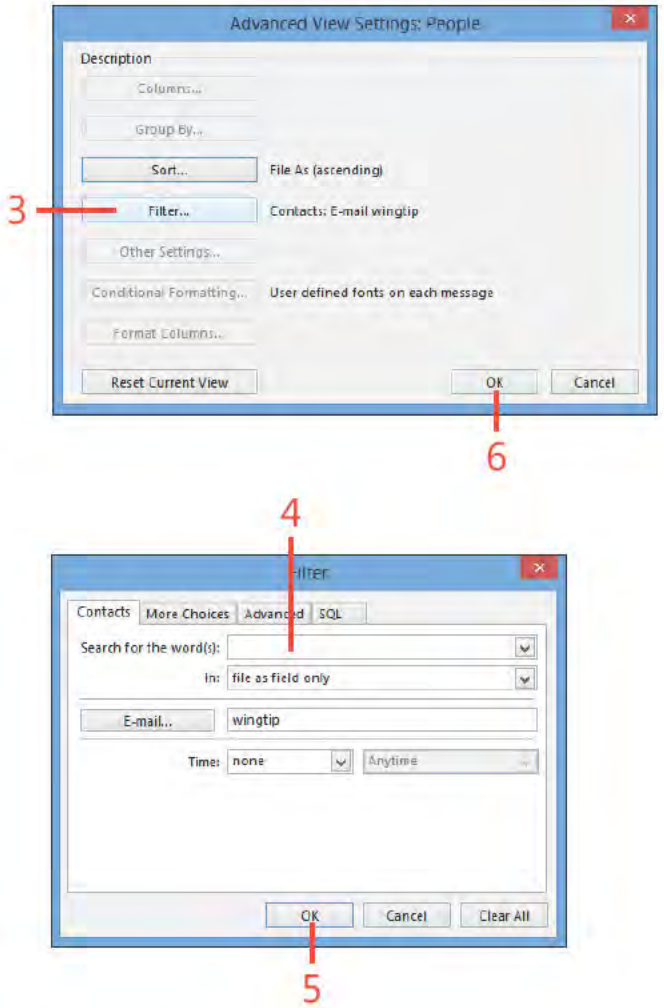
3 In the Advanced V ew Sett ngs d a og box, c ck F ter to open the F ter d a og box

4 C ck n the Search For The Word(s) text box and type a search word or phrase

5 C ck OK to c ose the F ter d a og box

6 C ck OK to c ose the Advanced V ew Sett ngs d a og box

(continued on next page)

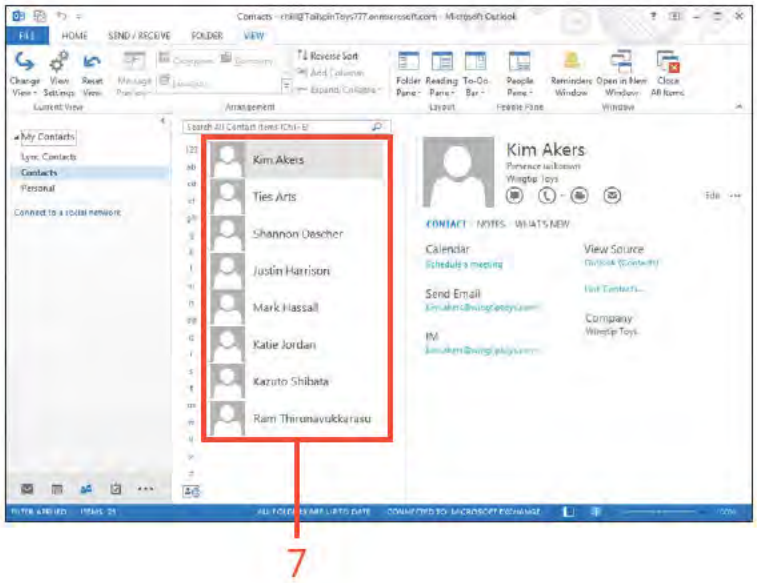


TIP To clear the filter on a view and restore its regular settings, click View Settings, click Filter, and then click Clear All. Then, click OK twice.

www.it-ebooks.info

Filter a view *(continued)*

7 The v ew shows on y tems that match the f ter cr ter a



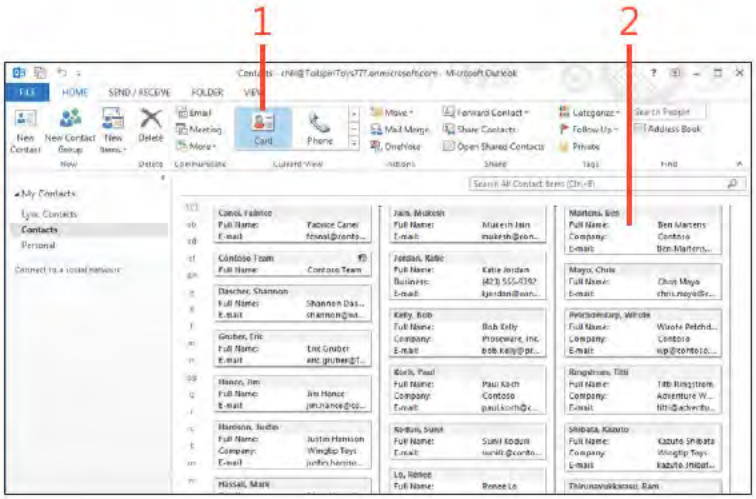
TRY THIS! Create a customized view by selecting Customize Current View from the Current View submenu. Click Filter and specify the filtering criteria for your custom view. For example, if you want Outlook to show only those contacts that have a specific email domain name, type that domain name in the E-Mail field.

View more fields in the contact form

1 Open the Card v ew from the Change V ew menu

2 Doub e-c ck a contact to open ts contact form

(continued on next page)



www.it-ebooks.info

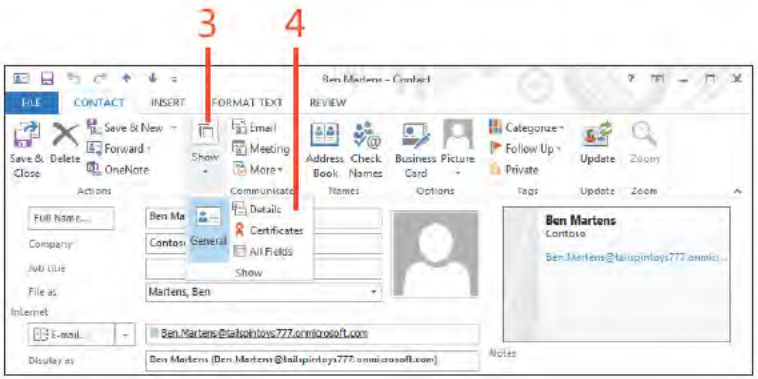
View more fields in the contact form *(continued)*

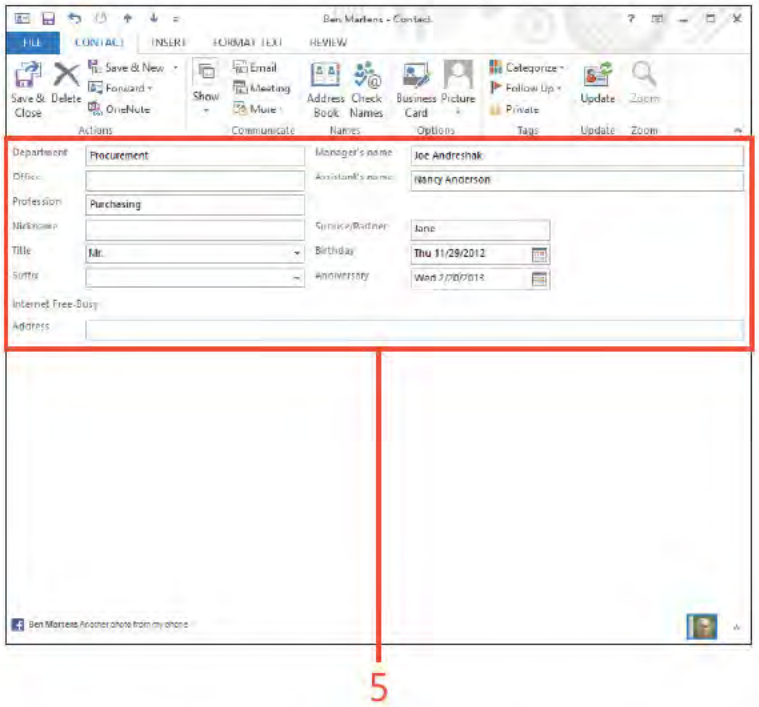
3 On the Contact tab, n the Commun cate group, c ck the Show button

4 In the drop-down st that appears, c ck Deta s

5 Add content to other f e ds as des red

(continued on next page)





TIP You can create and use customized views in any Outlook folder, not just the Contacts folder.

www.it-ebooks.info

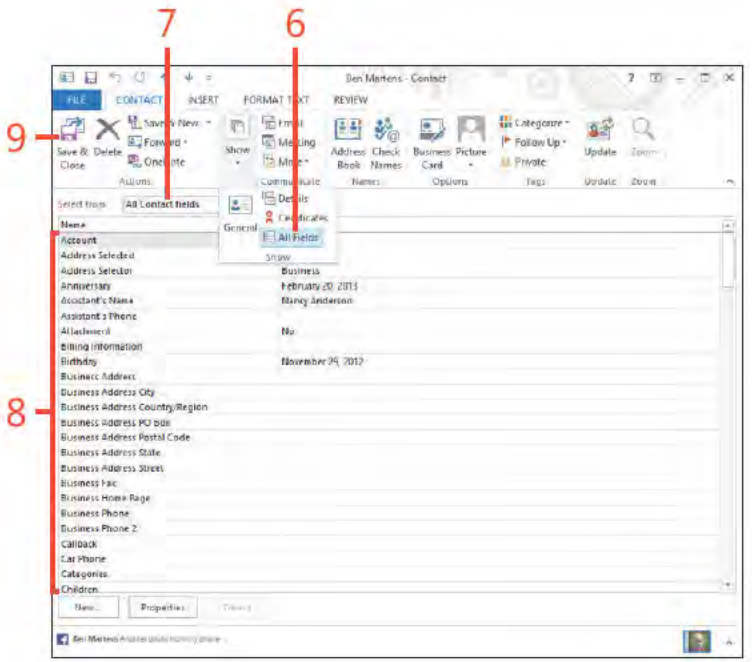
View more fields in the contact form *(continued)*

6 Aga n, on the Commun cate group, c ck the Show button and then, n the drop-down st that appears, choose A F e ds

7 In the Se ect From drop-down st, choose A Contact F e ds

8 Enter data n the resu t ng tabu ar v ew

9 On the r bbon, c ck the Contact tab and then Save & C ose



SEE ALSO For more information about sorting contacts, see "Organizing your contacts" on page 115.

TIP You can't view the Details or All Fields pages from the People view. Instead, you must open the contact from one of the other views and then choose the Details option from the Show menu on the ribbon.

www.it-ebooks.info

Communicating with contacts

Outlook 2013 makes it easy to communicate with your contacts. You can open the Contacts folder and create a new email message while viewing a contact's address card, or you can use Outlook's phone dialing feature to call a contact. You can also initiate an instant message (IM) session with the contact if you have Microsoft Lync installed and running on your computer.

Send a contact by email

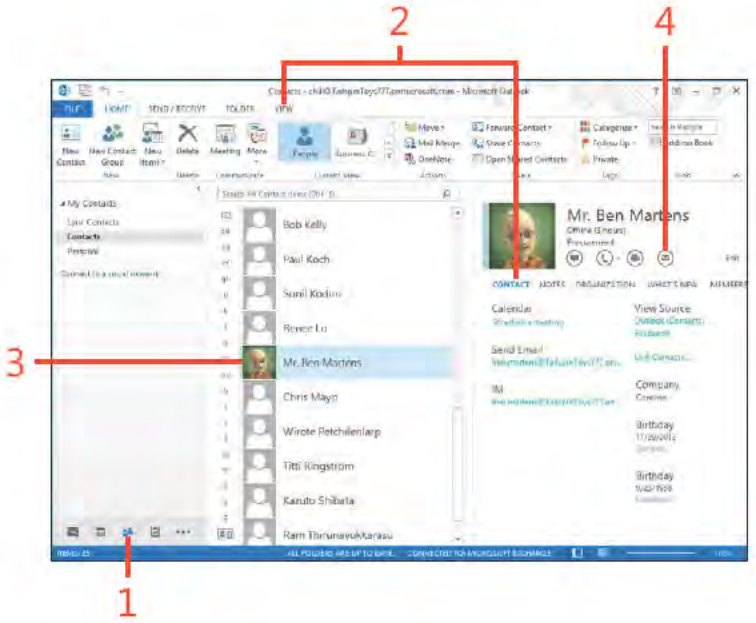
1 At the bottom of the Fo der pane, c ck the Peop e con to open the Peop e Hub

2 If the Read ng pane s not d sp ayed, open t

3 C ck a contact

4 In the Read ng pane, c ck the Ema button

(continued on next page)



TIP To send a message to multiple contacts, press Ctrl as you click contact names in the Contact folder. Then, on the Home tab, click Email to open a new message for those contacts.

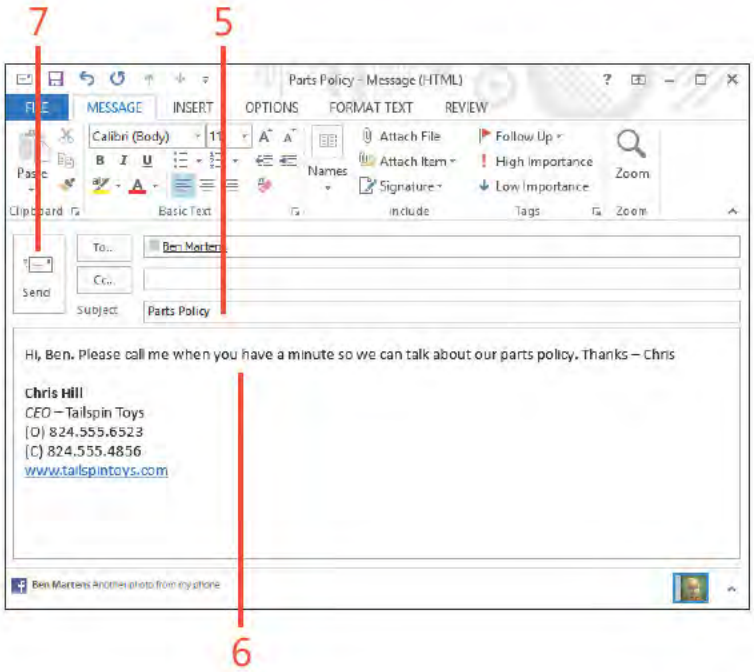
www.it-ebooks.info

Send a contact by email *(continued)*

5 Type a subject n the Subject f e d

6 Type your message

7 C ck Send



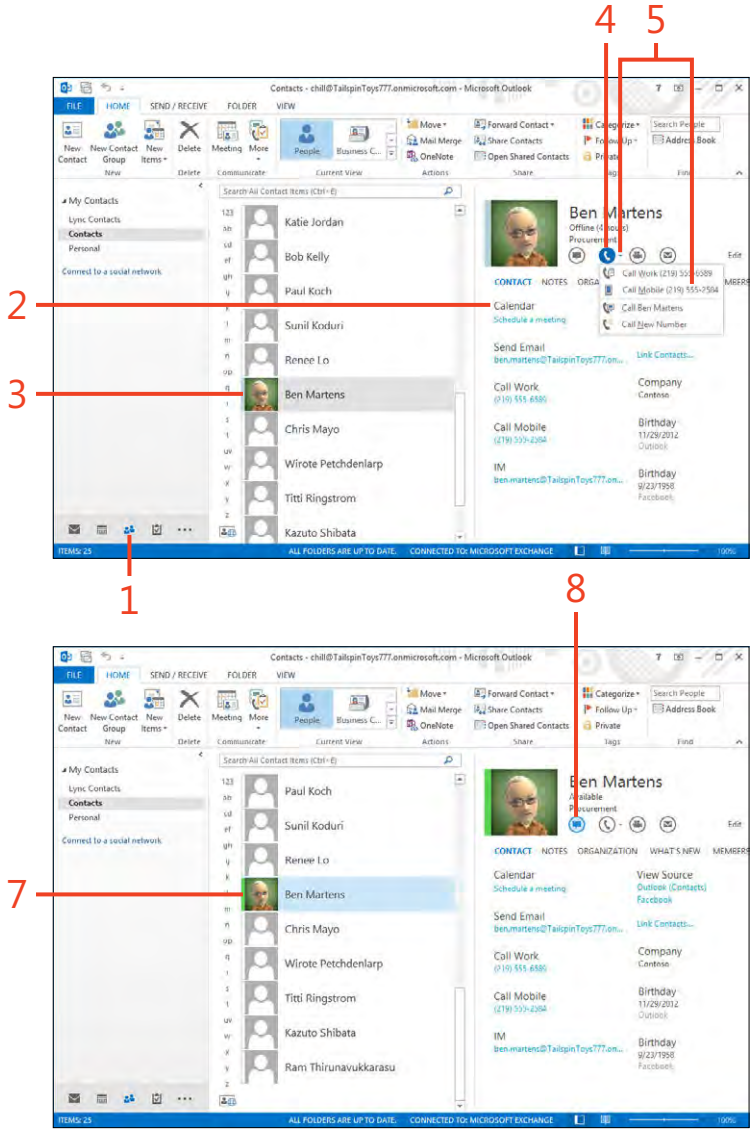
CAUTION If you select a contact that doesn't have an email address, you receive an error message that informing you of the problem or that another problem exists. You can click OK to continue, but you can't send the message to that contact until you provide a valid email address.

www.it-ebooks.info

Phone or IM a contact

1. At the bottom of the Fo der pane, c ck the Peop e con to open the Peop e Hub
2. Ensure that the Read ng pane s d sp ayed
3. C ck the contact that you want to ca
4. In the Read ng pane, c ck the Phone button, or...
5. C ck the sma down-arrow bes de the Phone button and choose a spec f c phone number to ca
6. Choose the number to ca
7. Se ect a person to whom you want to send an Instant Message, and note the green bar nd cat ng that the contact s on ne
8. In the Read ng pane, c ck the Send An IM button

(continued on next page)

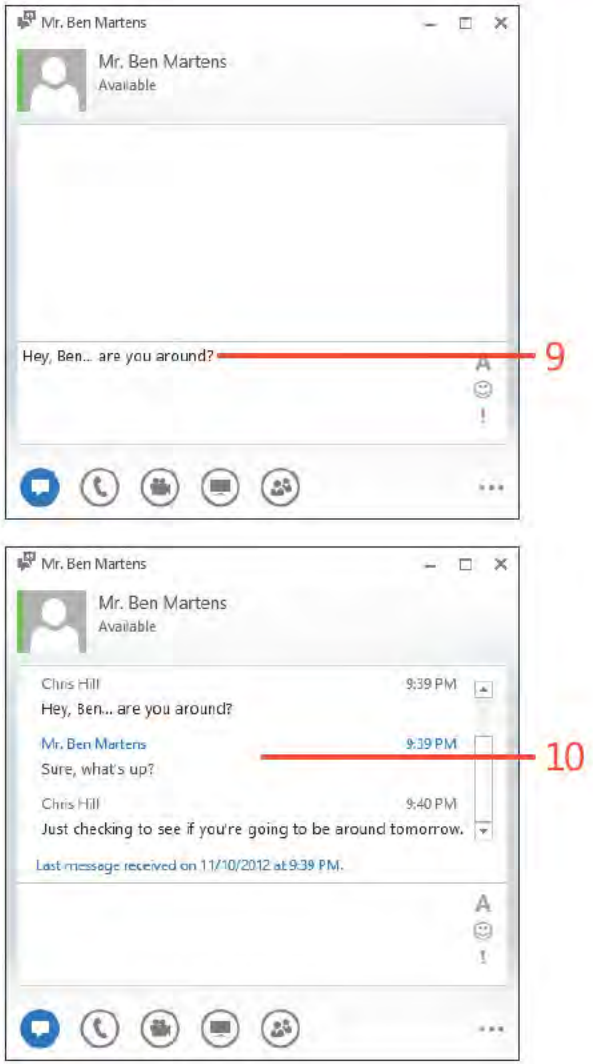


www.it-ebooks.info

Phone or IM a contact *(continued)*

9 In Lync, type your message and press Enter

10 V ew the response and cont nue the conversat on



TIP If you are using Lync, configure your audio settings in Lync before you place a call through Outlook.

www.it-ebooks.info

Managing a calendar

7

The Microsoft Outlook 2013 calendar simplifies the burden of keeping and maintaining a schedule of meetings, appointments, events, and tasks. At a glance, you can quickly see your agenda in daily, weekly, or monthly views. With Outlook, you won't have any excuses for missing a lunch date or forgetting a meeting.

You can use Outlook to keep track of recurring meetings or events so that you don't have to manually enter these items each time they take place. For example, you might have a weekly staff meeting that takes place every Friday from 9:00 to 10:00 A.M. Make it a recurring meeting, and Outlook blocks out that day and time. Similarly, if your PTA meets every third Tuesday of the month at 7:00 P.M., you can set Outlook to schedule that meeting, as well.

Outlook includes an alert that displays a message prior to your calendar meeting, appointment, or task so that you won't forget it. For example, you can set up Outlook to display a reminder of an upcoming meeting two or three days before its occurrence. If you need to prepare a presentation, document, or other item for the meeting, you give yourself ample time to do so. You then can "snooze" the reminder so that it gets your attention again later, but perhaps only three hours prior to the meeting.

In this section:

- Viewing your calendar
- Using the To-Do Bar
- Adding appointments
- Adding and modifying events
- Adding meetings
- Modifying meetings and tracking responses
- Inserting Outlook items, documents, and Excel objects into calendar items
- Attaching a file or document to a calendar item
- Sharing calendar information
- Printing calendars

www.it-ebooks.info

Viewing your calendar

You can view your Outlook 2013 calendar in several different formats. Day view is an hour-by-hour view of your daily schedule, whereas Month view shows your schedule for the entire month. The Date Navigator is a small calendar with which you can navigate quickly to a specific day, week, or month. The To-Do Bar consolidates all of the features of task list, Date Navigator, and appointment list into one task pane.

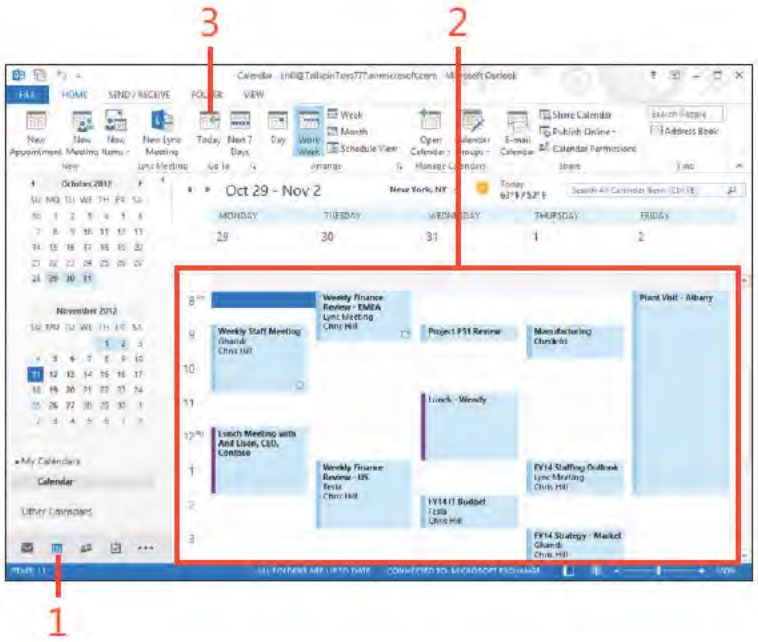
Use the calendar views and Date Navigator

1 At the bottom of the Fo der pane, c ck the Ca endar con

2 V ew the week's meet ngs and appo ntments

3 To d sp ay the current day n the current v ew, c ck Today

(continued on next page)



TIP You can access the current, last three, and next three months by clicking the month name in the Date Navigator. This is handy if you want to jump back a few months or jump forward a month or two.

TRY THIS! Click at the left side of a week in the Date Navigator to show that week's items.

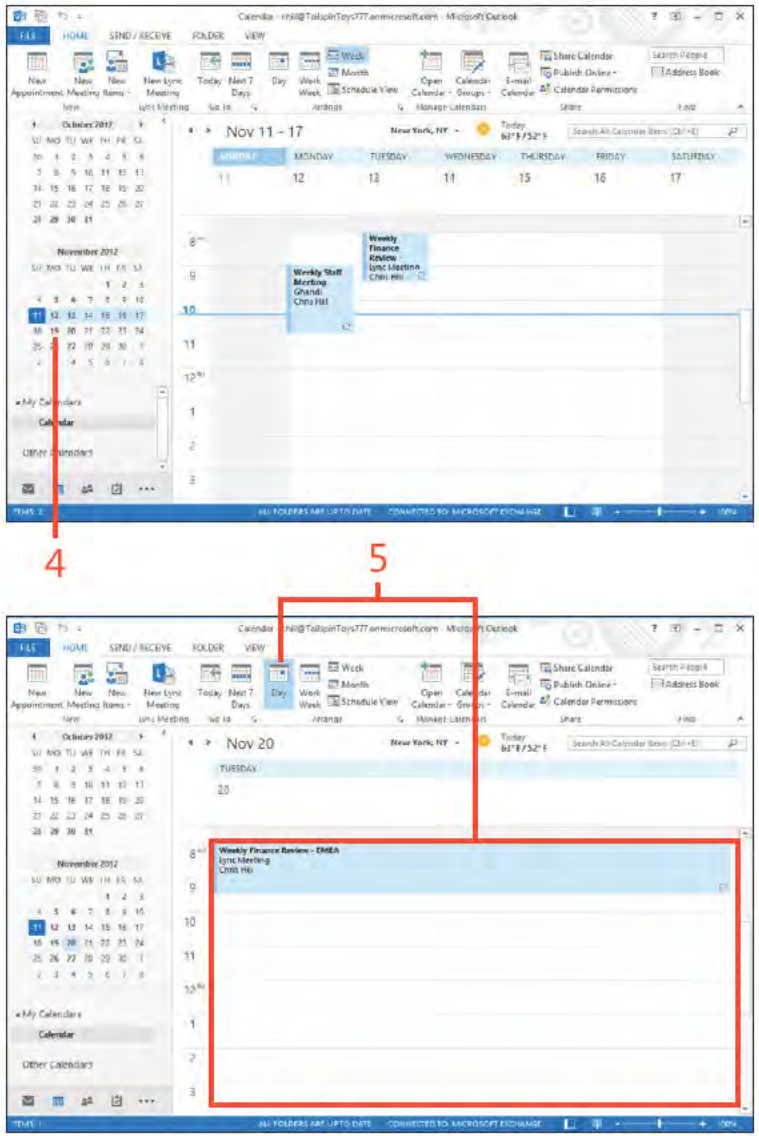
www.it-ebooks.info

Use the calendar views and Date Navigator *(continued)*

4 In the Date Nav gator, c ck a d fferent date

5 To v ew the se ected day's appo ntments and meet ngs, c ck Day

(continued on next page)



TIP You can make more room available for the Calendar pane on the screen by resizing or minimizing the Folder pane.

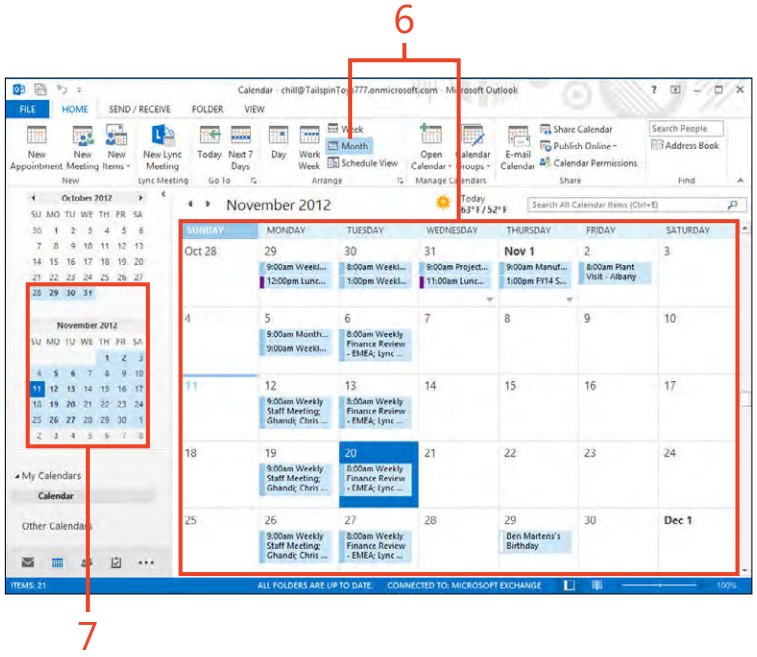
TRY THIS! To return to today's date, right-click inside a view and then, on the shortcut menu that appears, click Today.

www.it-ebooks.info

Use the calendar views and Date Navigator *(continued)*

6 C ck Month to see a month's schedu e

7 The d sp ayed date range s h gh ghted n the Date Nav gator



www.it-ebooks.info

Using the To-Do Bar

The To-Do Bar lets you view other information in the Calendar view as well as calendar items. In addition to showing a small calendar, you can use to choose a day to view (in place of the Folder pane, for example). You can also view contacts that you have added to your Favorites as well as upcoming tasks.

Use the To-Do Bar

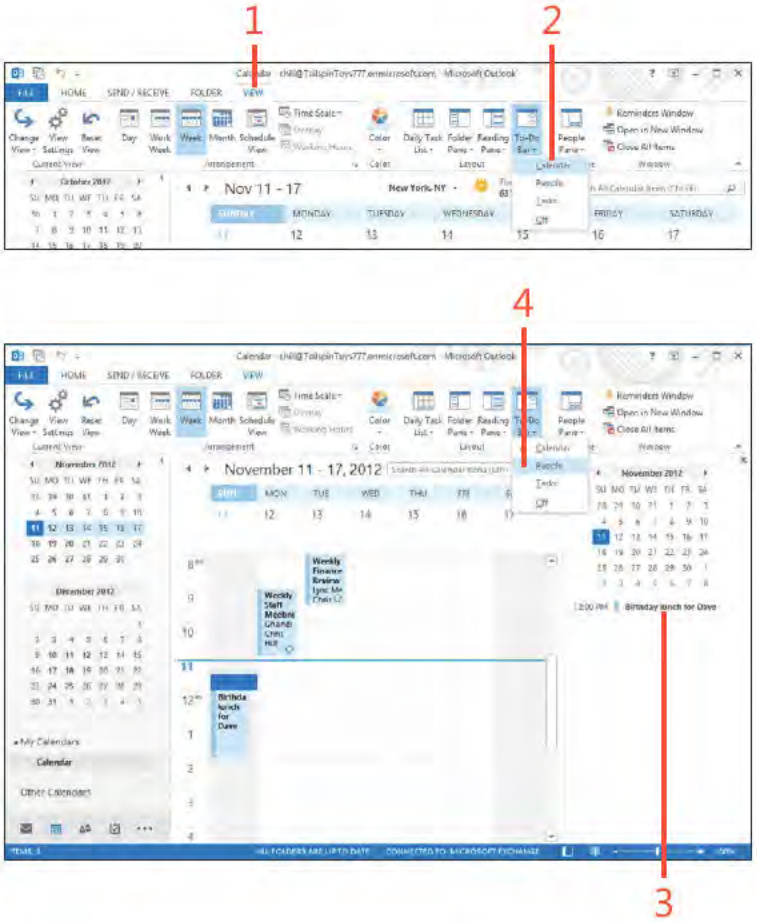
1 On the r bbon, c ck the V ew tab

2 In the Layouts group, c ck To-Do Bar and then, n the drop-down st that appears, choose Ca endar

3 Any tems for the current day appear n the To-Do Bar

4 Aga n, n the Layouts group, c ck To-Do Bar and then, n the drop-down st that appears, choose Peop e

(continued on next page)



TIP Choose the Minimized option from the To-Do Bar submenu to make the To-Do Bar automatically hide at the edge of the Outlook window.

www.it-ebooks.info

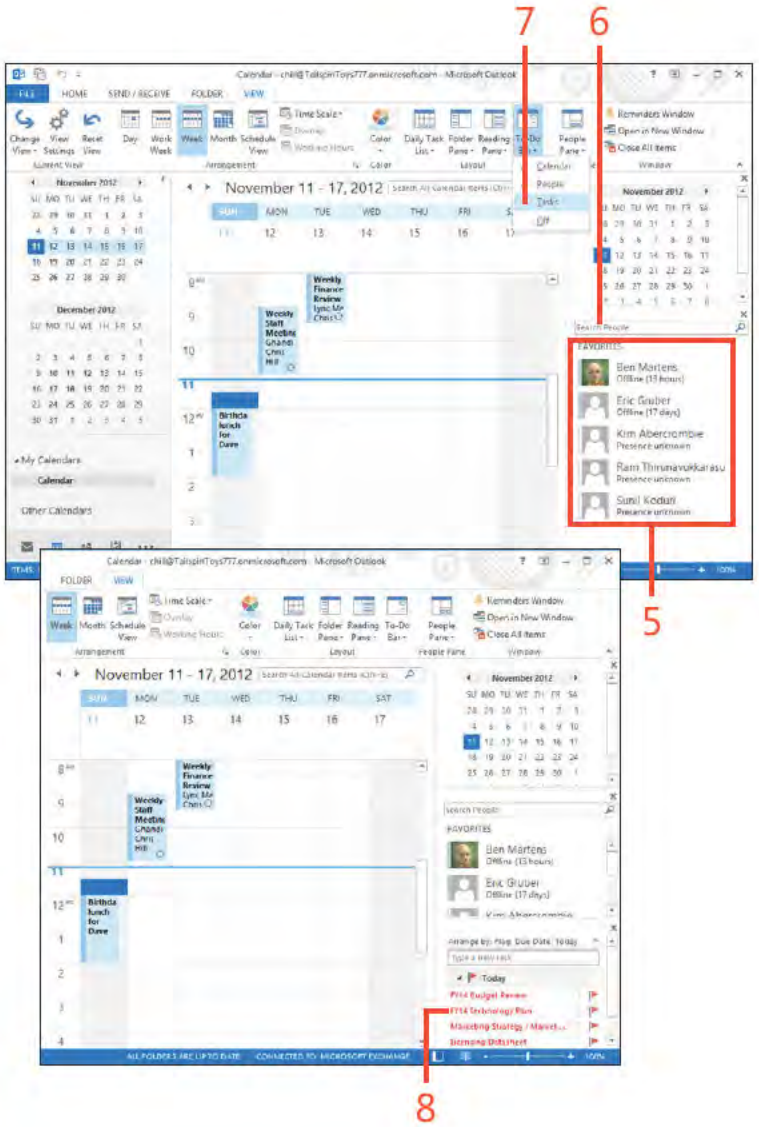
Use the To-Do Bar *(continued)*

5 Peop e that you have added as favor tes appear n the To-Do Bar

6 Use the Search Peop e text box to search for contacts

7 In the Layouts group, c ck To-Do Bar and then, n the drop-down st that appears, choose Tasks

8 Doub e-c ck a task to open t



TIP Depending on the options you set for the To-Do Bar, portions of the Appointments or Tasks areas of the To-Do Bar might be blank.

www.it-ebooks.info

Adding appointments

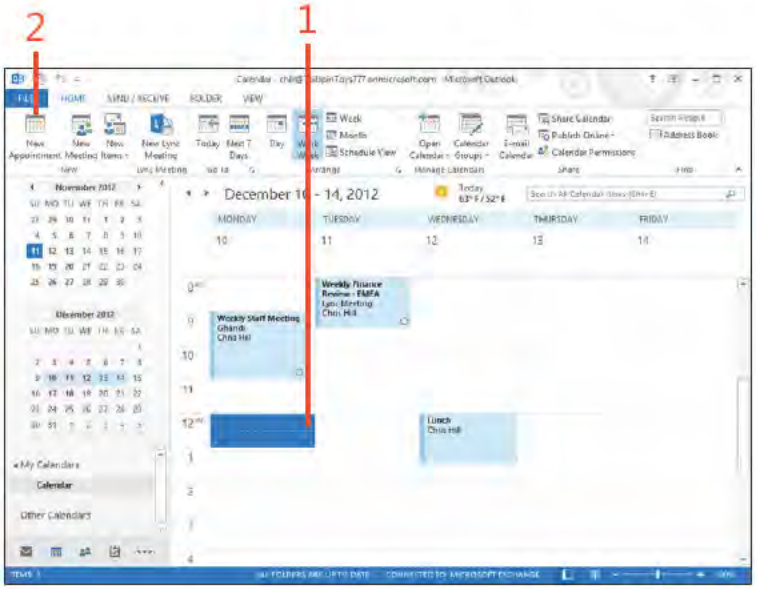
An appointment in Outlook 2013 is an activity you enter for a specific time that, unlike a meeting, doesn't typically involve other people or resources. When you schedule an appointment, you block out a day, a time, and a location for that appointment to occur. As mentioned earlier, Outlook also lets you set a reminder that flashes on your screen and plays a sound to alert you to the appointment. To learn how to set a reminder, see page 164.

Add an appointment with the menu

1 Se ect a b ock of t me for the appo ntment

2 On the Home tab, n the New group, c ck New Appo ntment

(continued on next page)



TIP Keep your appointment subjects as short as possible so that they're easy to read in the Calendar view.

www.it-ebooks.info

Add an appointment with the menu *(continued)*

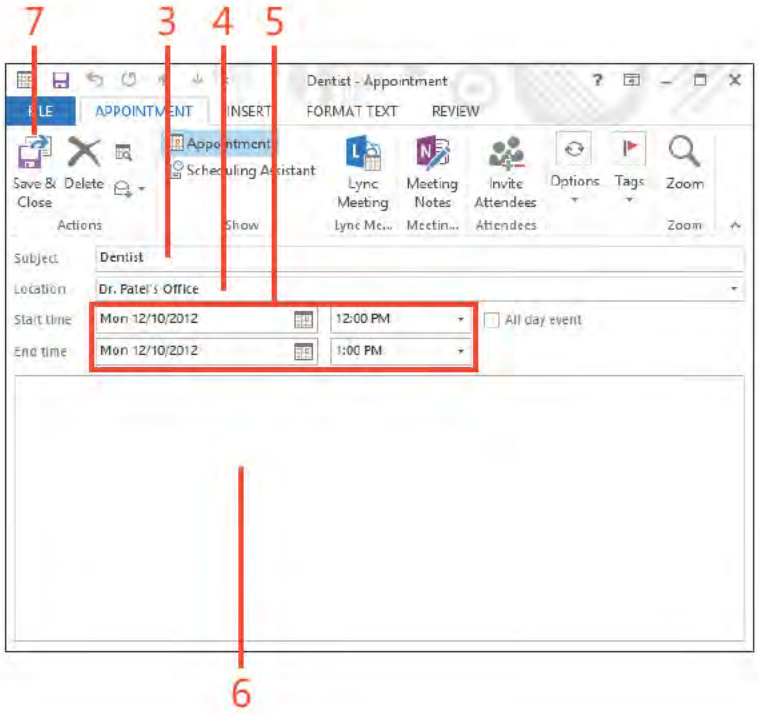
3 Type a subject

4 Type the ocat on of the appo ntment

5 Adjust the date and t mes, f needed

6 Add notes f you want

7 C ck the Save & C ose button

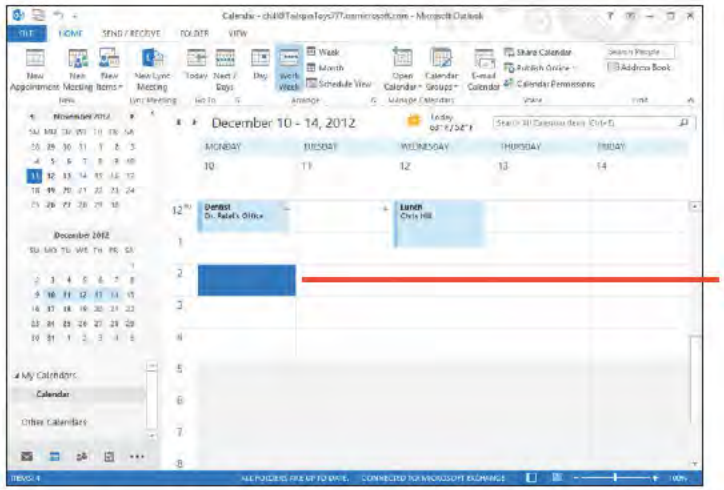


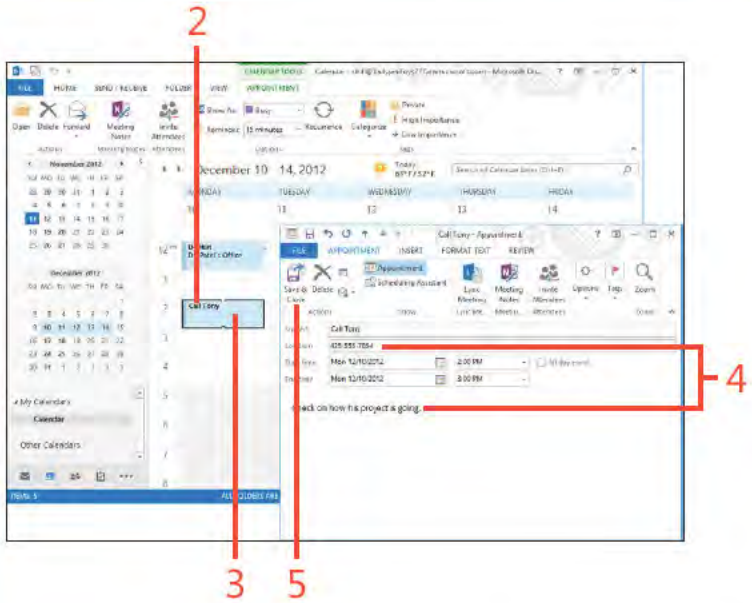
TRY THIS! If you'd like to add extended information about an appointment, click in the text area at the bottom of the Appointment window. Type a longer description here, such as directions to the appointment location, important information about the appointment, and so on.

www.it-ebooks.info

Add an appointment right on the calendar

1 On the ca endar, drag to se ect a b ock of t me for the appo ntment
2 Type the subject of the appo ntment and press Enter
3 Doub e-c ck the appo ntment to open the appo ntment form
4 Add the ocat on, notes, and other nformat on to the appo ntment
5 C ck the Save & C ose button





TIP If you use Outlook with a Microsoft Exchange Server account, others can easily see your free/busy time. They will know when you're busy and can schedule meetings with you based on this information.

TRY THIS! To categorize the appointment, right-click the appointment, point to Categorize, and then, on the submenu that appears, click a category.

www.it-ebooks.info

Adding and modifying events

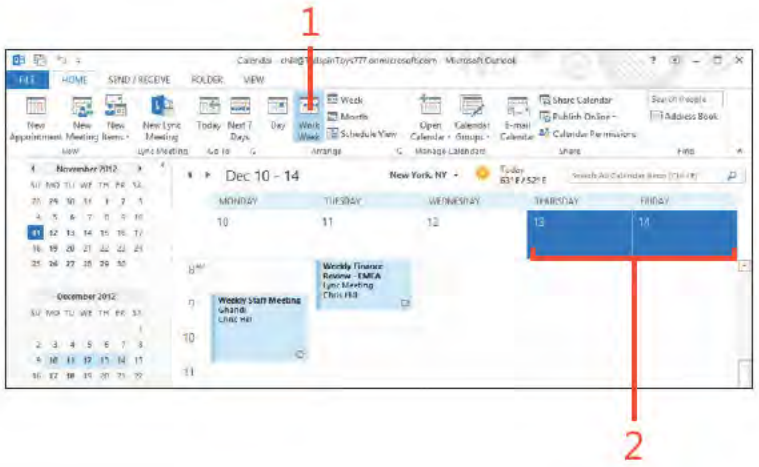
In Outlook 2013, an event is an activity that runs for 24 hours or longer. An example of an event is a weeklong conference or seminar that you attend. Events display as banners at the top of the day and run from midnight to midnight, so they don't take up blocks of time on the calendar. This display method leaves room in your calendar for you to show appointments or meetings that you might schedule during event days.

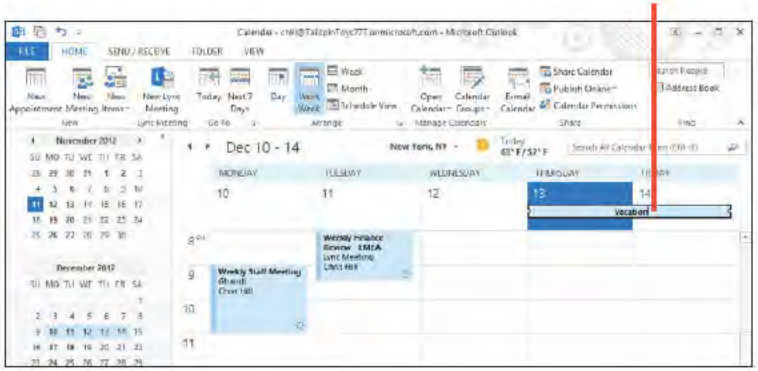
Add the event

1 On the Home tab, n the Arrange group, c ck Work Week

2 On the ca endar, se ect one or more days

3 Type the subject for the event





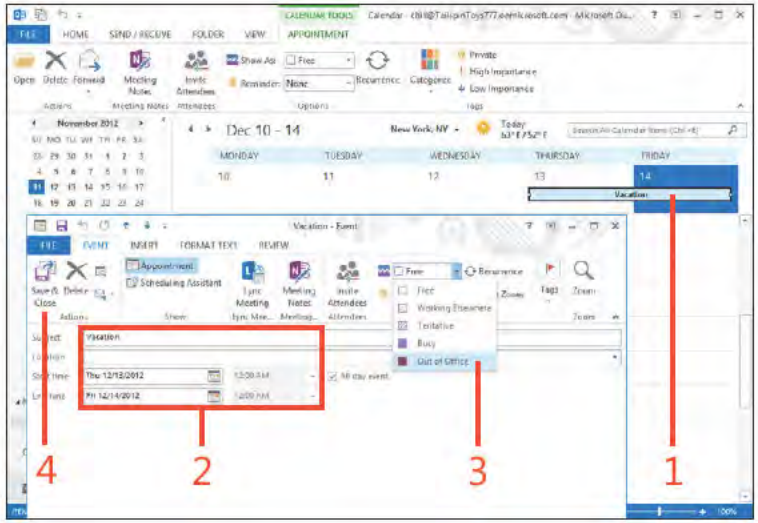
TIP To add an all-day event to a day other than the current day, display the week or month, right-click the day, and then, on the shortcut menu that appears, click New All Day Event.

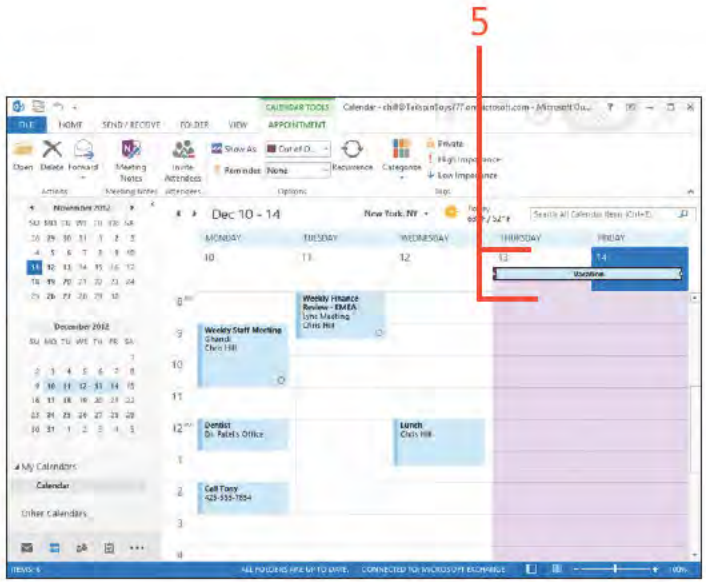
TRY THIS! You can add more information about an event to the text area at the bottom of the Event window.

www.it-ebooks.info

Modify an event

1 Doub e-c ck the event to open t
2 Change deta s of the event as needed
3 Choose a free/busy opt on
4 C ck Save & C ose
5 The se ected days now show as Out Of Off ce (purp e)





TIP You might already have events entered in your Calendar folder without even knowing it. When you create a new contact in the Contacts folder and include a birthday or anniversary for the contact, Outlook schedules that date as an event in the calendar.

SEE ALSO For information about setting up contacts, see "Working with contacts" on page 41.

www.it-ebooks.info

Adding meetings

A meeting is an activity (often a physical meeting or conference call) that involves other people and sometimes resources. A resource can be a conference room, VCR, slide projector, telephones, laptop computer, or other equipment. Usually, a meeting involves you and at least two other people (but can certainly be just you and one other person). Outlook sends a meeting invitation to every person you designate, and they can accept or reject the request or propose a new time for the meeting.

Create a meeting

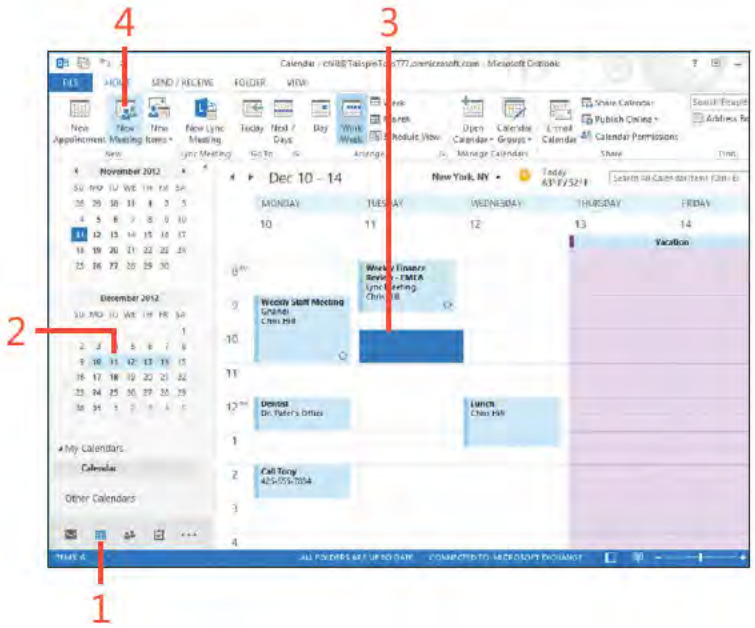
1 At the bottom of the Fo der pane, c ck the Ca endar con to open the Ca endar fo der

2 Se ect a date

3 Se ect a b ock of t me for the meet ng

4 On the Home tab, n the New group, c ck New Meet ng

(continued on next page)



TIP You can use the Scheduling Assistant to help you find a time that is open for all invitees, and you can also identify available resources. To switch to the Scheduling Assistant view, on the Meeting tab, in the Show group, click Scheduling Assistant. Plus, as a follow-up, you can use the Tracking button on the Meeting tab to see which attendees have responded to your meeting request.

www.it-ebooks.info

Create a meeting *(continued)*

5 C ck To

6 In the Se ect Attendees And Resources d a og box, choose the attendees and resources from the Address Book, or type the addresses manua y

7 If the nv tee must attend, c ck Requ red

8 If the nv tee sn't requ red to attend, c ck Opt ona

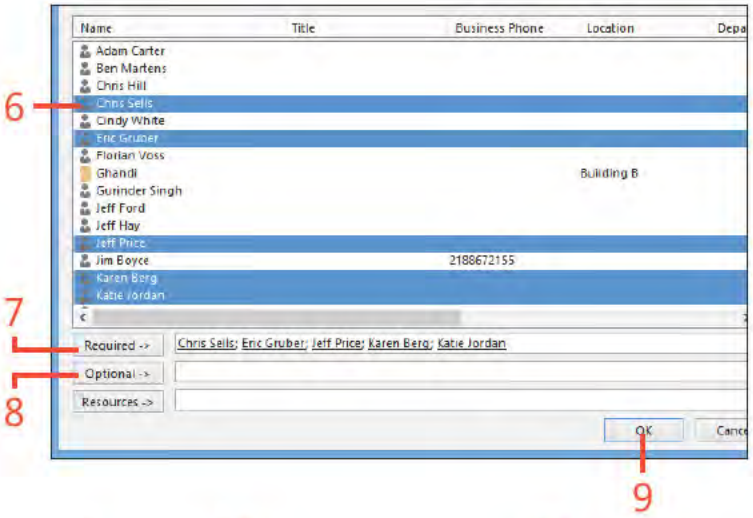
9 C ck OK when you are done

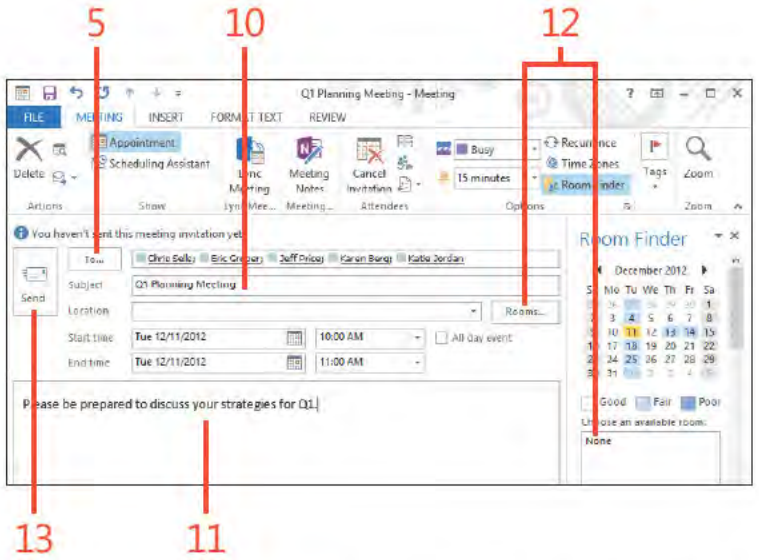
10 In the Subject box, type a descr pt on of the meet ng

11 Add notes, d rect ons, or comments for the meet ng as needed

12 Choose a room, or type the ocat on of the meet ng n the Locat on box

13 C ck Send





CAUTION Make sure that your attendee list has correct email addresses. If you attempt to send the meeting request to someone not in one of your address books, Outlook informs you that the person can't be validated.

TIP When you type your meeting subject, keep it short but descriptive. "Team Meeting" might not be enough if people are members of multiple teams. Use something specific like "Development Team Meeting" for your description.

www.it-ebooks.info

Modifying meetings and tracking responses

After you create a meeting in Outlook 2013, you can add or remove attendees, add notes and attachments, change it to an online meeting, and make other changes. You can make these same types of changes with a new meeting invitation before you save it. You can also track which invitees have responded to your meeting invitation to find out who will attend.

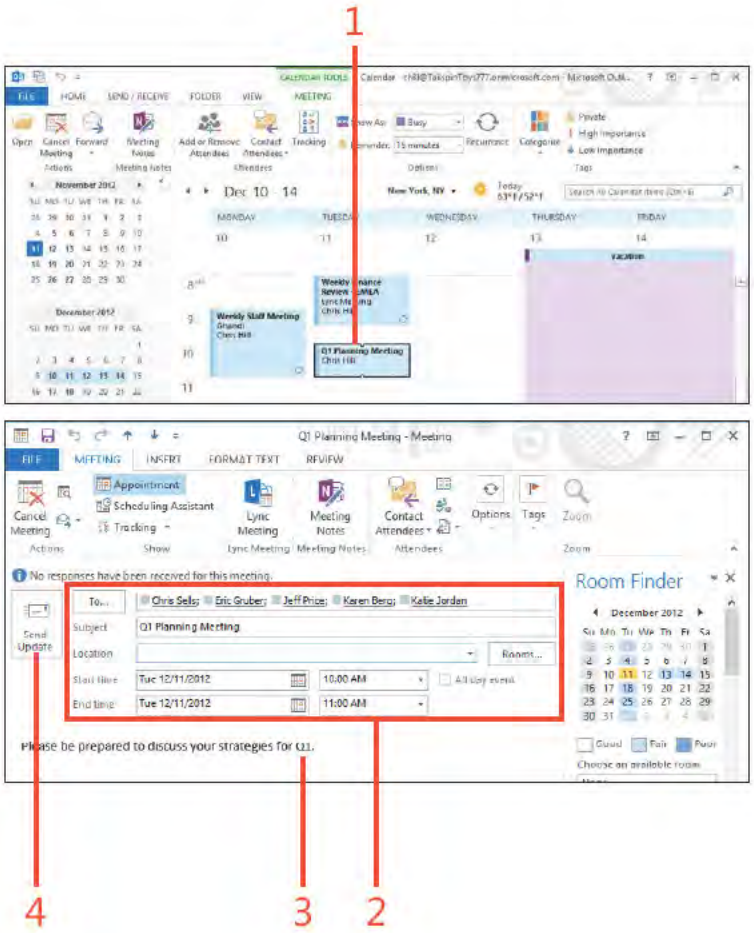
Edit a meeting

1 Open an ex st ng meet ng

2 Change attendees, subject, and ocat on for the meet ng, as needed

3 Add notes or attach documents f needed

4 C ck Send Update to send an updated meet ng nv tat on



TIP You can reschedule a meeting simply by dragging it to a new location on the calendar. Regardless of the method you use to move the meeting, Outlook can automatically send an update to all attendees that includes a notice of the new day and time.

www.it-ebooks.info

Track attendee responses

1 Open an ex st ng meet ng request Then, on the Meet ng tab, n the Show group, c ck Schedu ng Ass stant

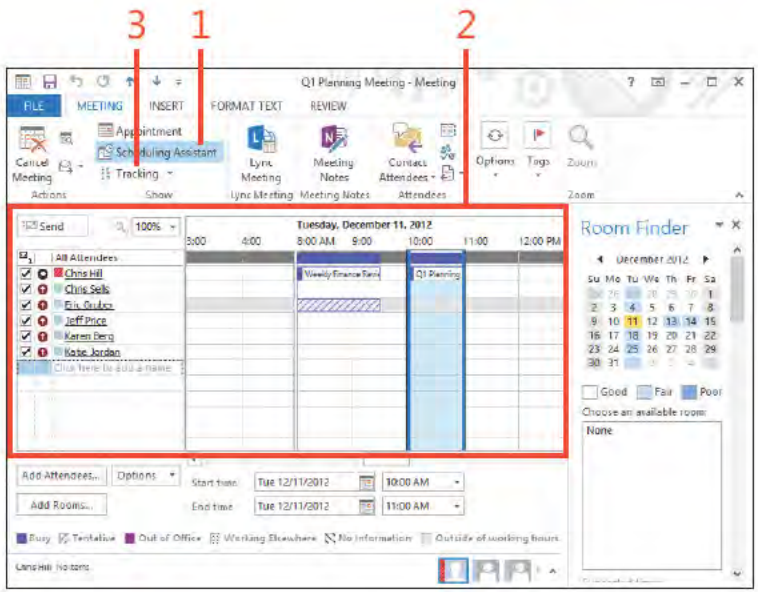
2 V ew attendees' free/busy t mes and adjust meet ng day and t me as needed

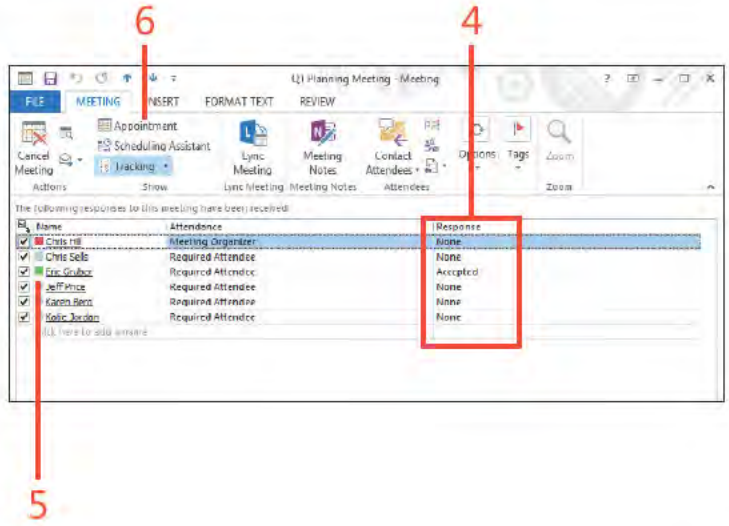
3 Aga n, on the Meet ng tab, n the Show group, c ck Track ng

4 V ew response status for each attendee

5 V ew on ne status

6 On the r bbon, on the Meet ng tab, c ck Appo ntment to return to the Appo ntment page, and then c ck Send Update





SEE ALSO For information about the Address Book and adding new contacts, see "Working with contacts" on page 41.

TIP Outlook provides the Scheduling Assistant to help you set up meetings with other people in your organization. The Scheduling Assistant lets you see other people's schedules if they have mailboxes in the same Exchange Server environment.

www.it-ebooks.info

Inserting an Outlook item into a calendar item

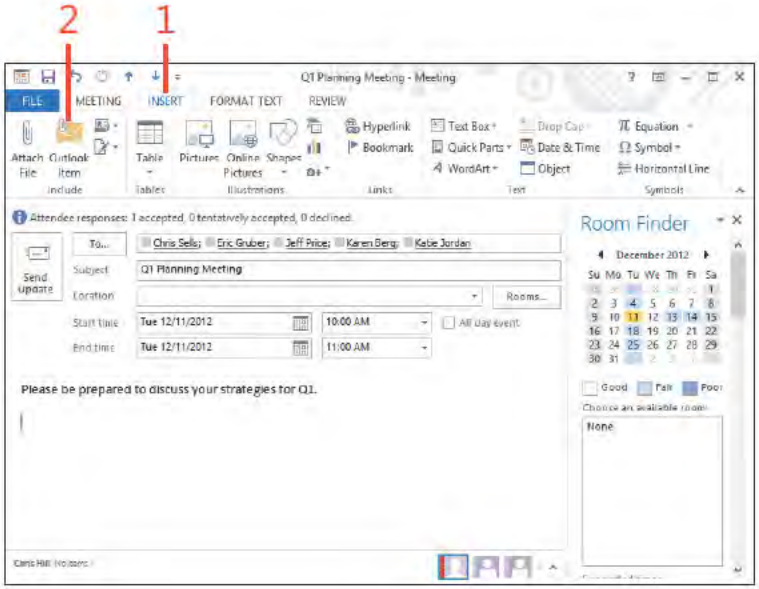
In Outlook 2013, you can insert objects, files, and Outlook items into your calendar items. The capability to insert Outlook items means that you can insert contacts, email messages, and other Outlook items into an appointment, meeting, or event item. For example, if you are having a meeting to discuss a project with an outside partner, you can insert the partner's contact(s) into the meeting invitation so that other attendees will have them.

Add an Outlook item

1 W th an appo ntment, meet ng, or event open, on the r bbon, c ck the Insert tab

2 In the Inc ude group, c ck Out ook Item

(continued on next page)



TIP Outlook uses an item-specific icon to indicate the type of Outlook item that you can insert, such as a note icon for a note item or calendar icon for a calendar item.

www.it-ebooks.info

Add an Outlook item *(continued)*

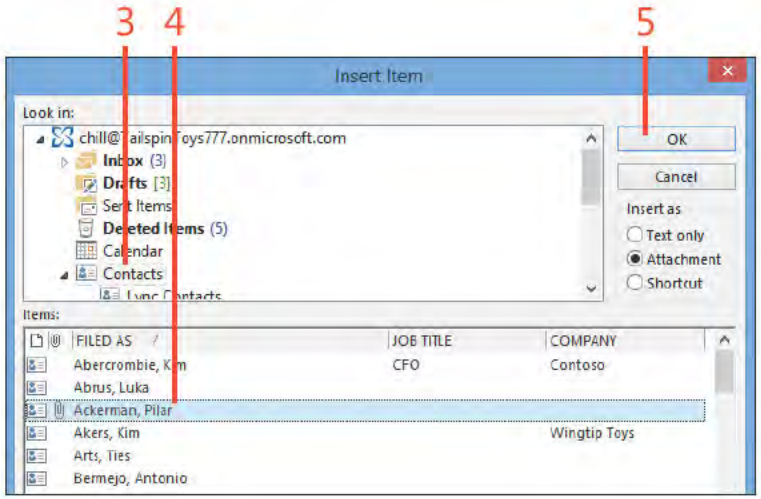
3 In the Insert Item d a og box, se ect the Out ook fo der n wh ch the tem s stored

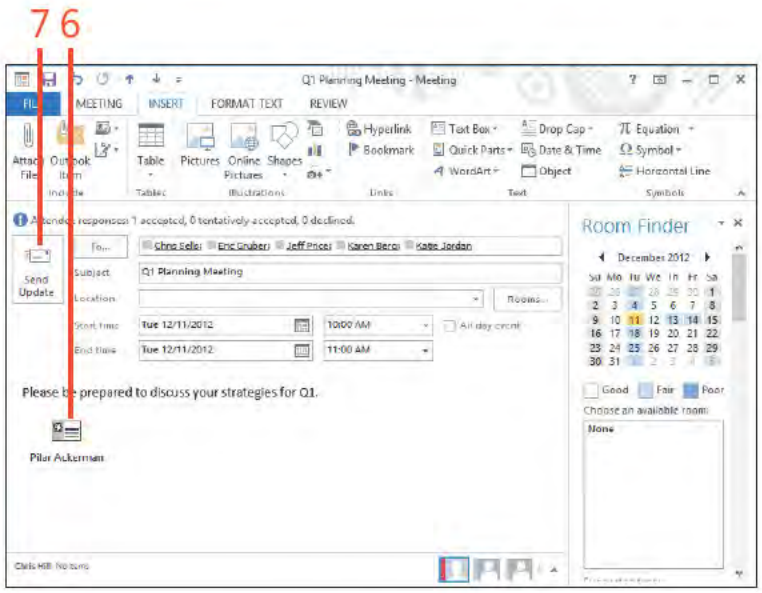
4 Se ect the Out ook tem thatyou want to nsert from the Items st

5 C ck OK

6 The se ected tem now appears n the comment f e d

7 C ck the Meet ng, Appo ntment, or Event tab and then c ck Save & C ose (for an appo ntment or event) or Send Update (for a meet ng)





TRY THIS! To insert the text contained in a contact rather than the contact address card itself, in the Insert Item dialog box, select the Text Only option.

www.it-ebooks.info

Attaching a file or document to a calendar item

In many situations, you might want to attach a document or other type of file to an Outlook 2013 calendar item. For example, if you are meeting to discuss a project, you might attach a project plan, financials from Microsoft Excel, or a report.

Attach a file

1 W th an appo ntment, meet ng, or event open, on the r bbon, c ck the Insert tab

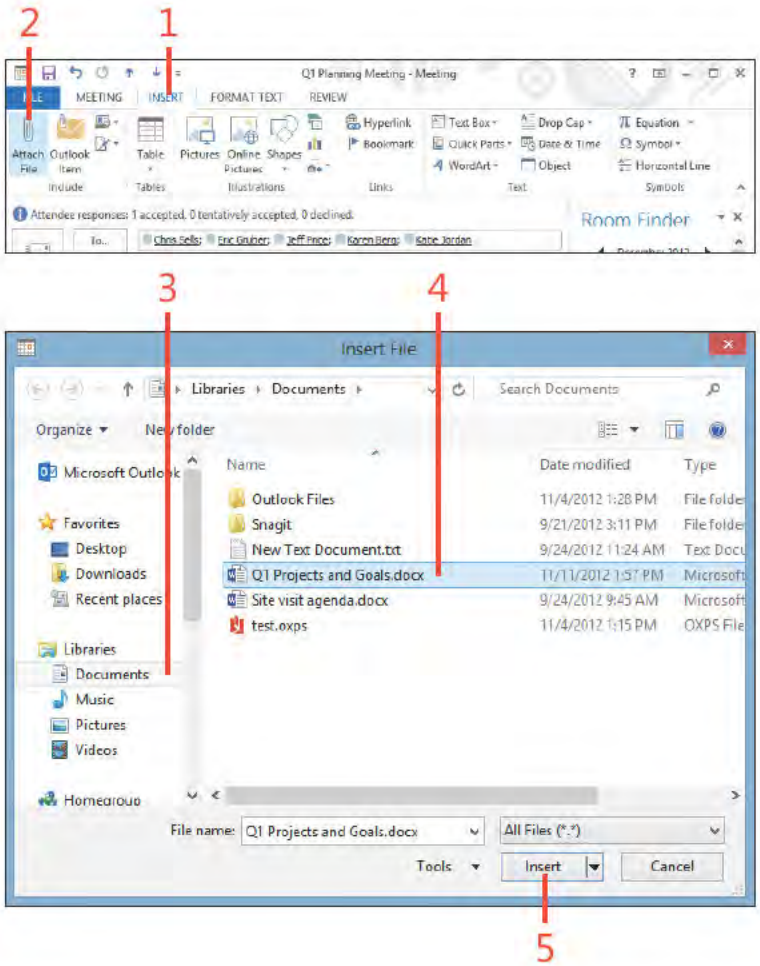
2 In the Inc ude group, c ck the Attach F e button

3 In the Insert F e d a og box, se ect a f e ocat on

4 Se ect the f e that you want to nsert

5 C ck Insert

(continued on next page)



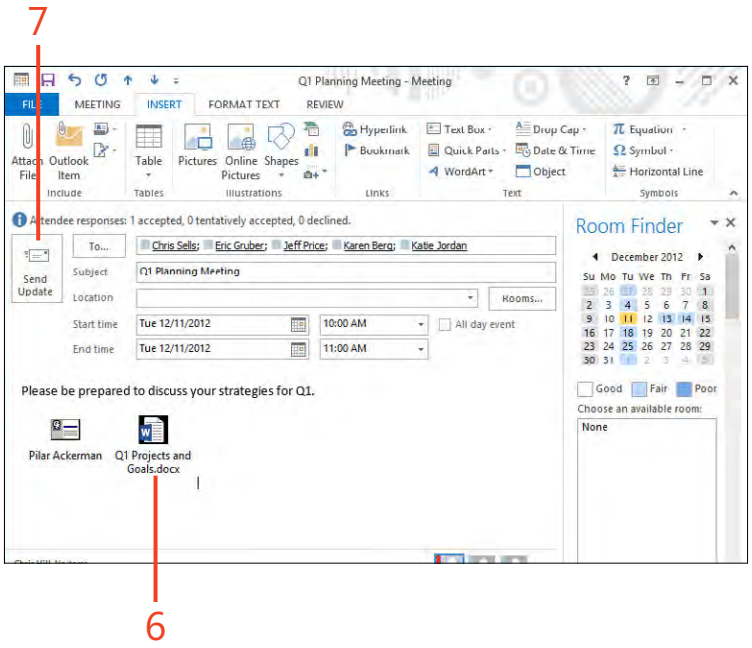
TIP To delete a file, item, or object from a calendar item, select the item and press Delete.

www.it-ebooks.info

Attach a file *(continued)*

6 The added f e appears n the comment f e d

7 C ck the Meet ng, Appo ntment, or Event tab and then c ck Save & C ose (or, for a meet ng, c ck Send Update)



www.it-ebooks.info

Inserting the contents of a document into a calendar item

Sometimes, you'll want to insert the contents of a document into an Outlook 2013 meeting or other calendar item, rather than attach the item to it. Inserting the contents into the calendar item makes it possible for you and others to view those contents without opening the attached source document.

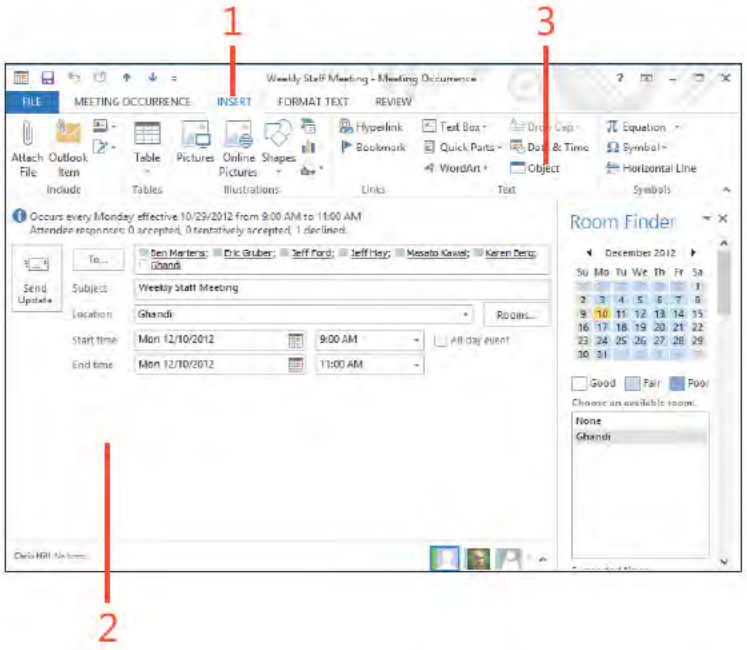
Insert contents of a document

1 W th an appo ntment, meet ng, or event open, on the r bbon, c ck the Insert tab

2 C ck n the notes area of the tem

3 Back on the r bbon, n the Text group, c ck Object

(continued on next page)



TIP Because you can add objects from a file, you can also embed a portion of a spreadsheet or other type of document in the appointment item for reference. For example, if you are discussing a project issue list in a meeting, you might embed the issue list from an Excel spreadsheet in the meeting request so that the participants can review it before the meeting.

www.it-ebooks.info

Insert contents of a document *(continued)*

4 In the Object d a og box, c ck the Create From F e tab

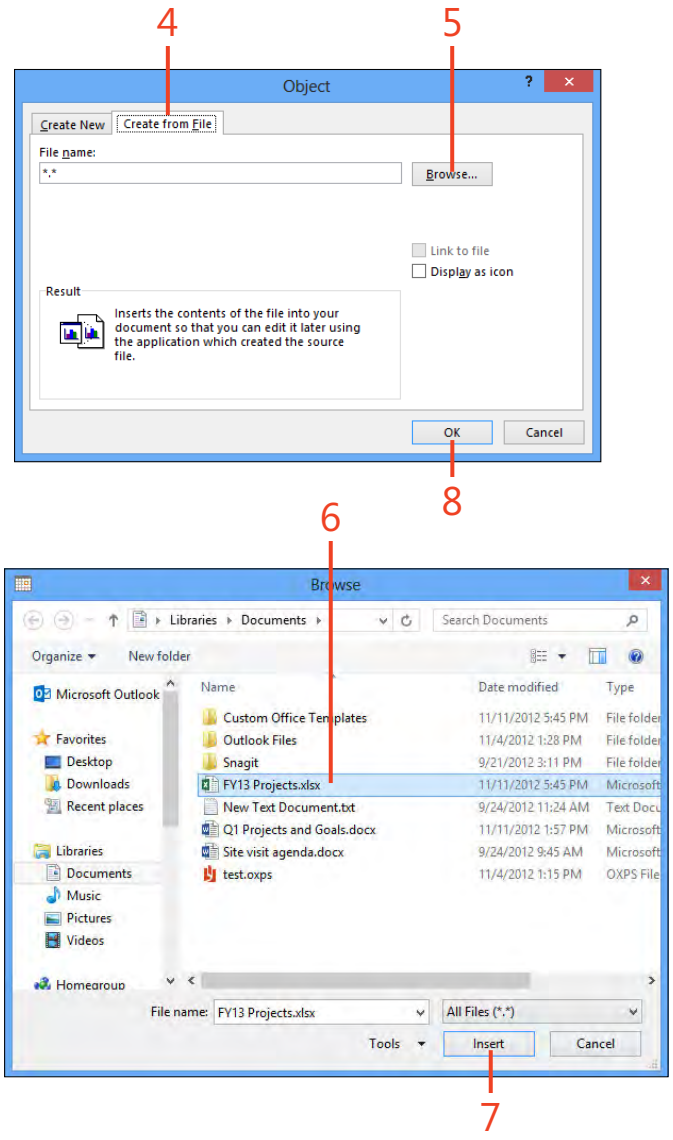
5 C ck Browse

6 In the Browse d a og box, ocate and se ect the object that you want to add

7 C ck Insert

8 In the Object d a og box, c ck OK

(continued on next page)

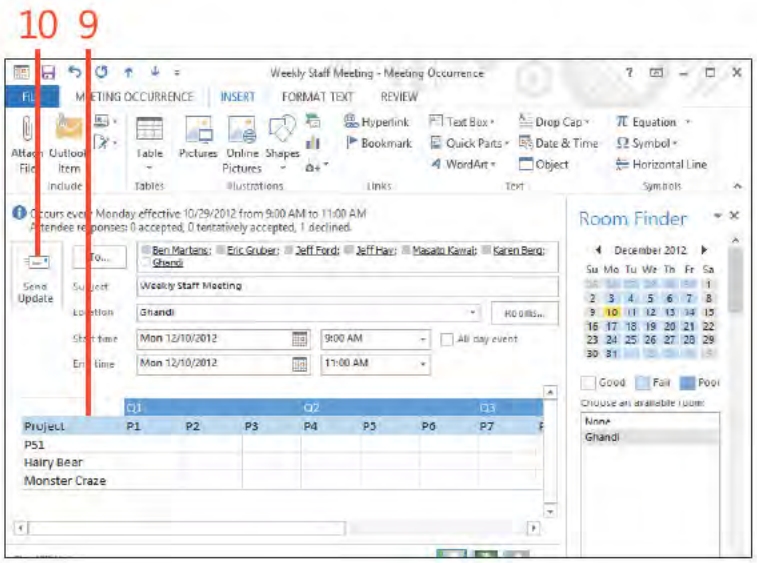


www.it-ebooks.info

Insert contents of a document *(continued)*

9 Ver fy that the added object appears n the comment f e d

10 C ck Save & C ose (or Send Update)



TIP To create a new object, such as an Excel worksheet, in the Insert Object dialog box, select Create New. When you click OK to insert the object, you then create the new object in that object's native application (such as Excel).

www.it-ebooks.info

Inserting an Excel object into a calendar item

You can insert a blank Excel object into a calendar item. This makes it possible for you to edit spreadsheet data within the calendar item itself. This capability is useful when you want to be able to enter values and calculate data that doesn't exist yet in an Excel file.

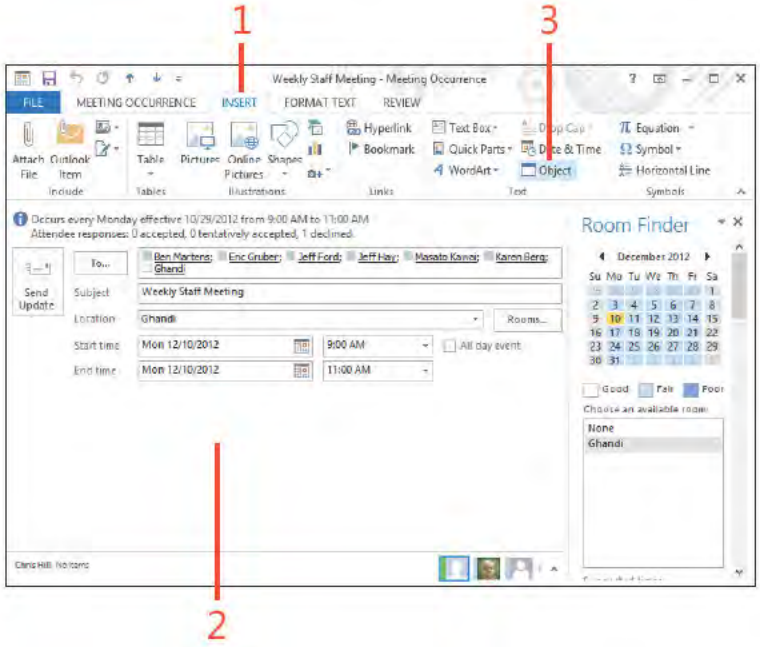
Insert a blank Excel object

1 W th an appo ntment, meet ng, or event open, on the r bbon, c ck the Insert tab

2 C ck n the notes area of the tem

3 Back on the r bbon, n the Text group, c ck Object

(continued on next page)



TIP Outlook adds a reminder to each meeting you create. The default is 15 minutes, but you can either change the default or change the reminder for a specific meeting. To change the reminder for one meeting, On the ribbon, on the Meeting Occurrence tab, click the Reminder drop-down list. To set the default reminder time, on the ribbon, click the File tab to display the Backstage view. Click the Options tab and then, in the Outlook Options dialog box, choose Calendar. In the Default Reminders drop-down list, select the desired reminder time.

www.it-ebooks.info

Insert a blank Excel object *(continued)*

4 In the Object d a og box, c ck M crosoft Exce Worksheet on the Create New tab

5 C ck OK

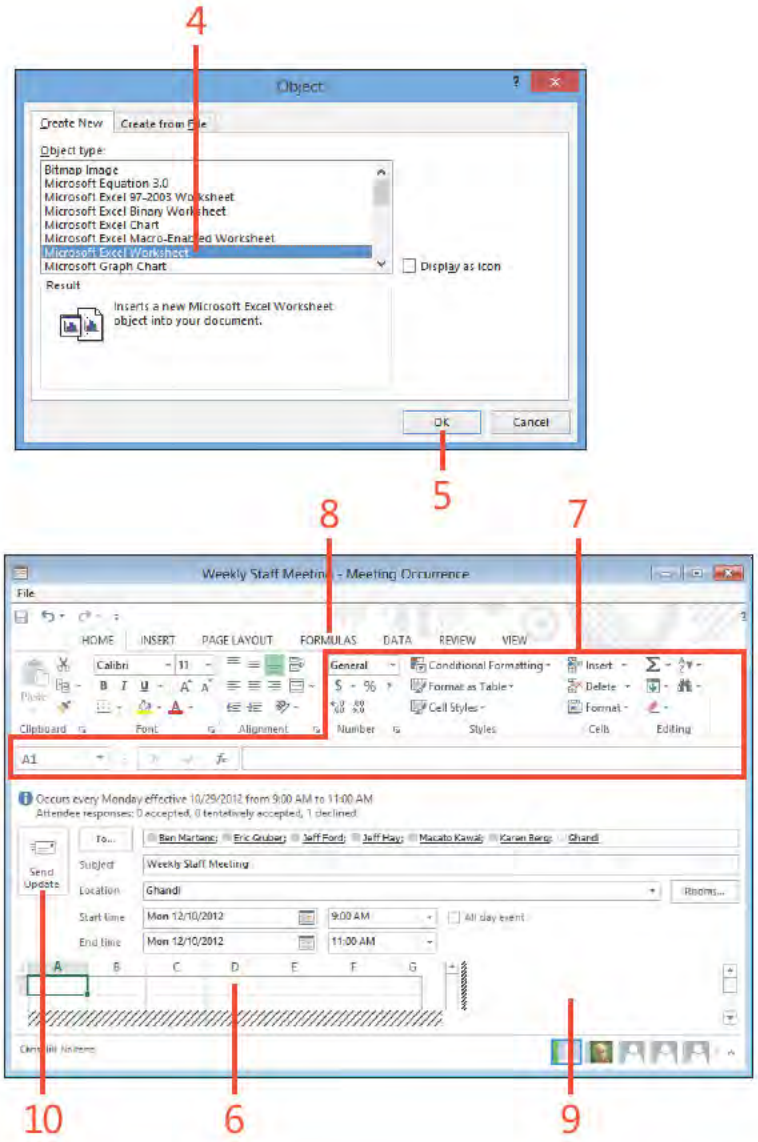
6 Add va ues and formu as as needed n the Exce object

7 On the r bbon, on the home tab, use ed t ng too s to mod fy or format the Exce data

8 C ck the Formu as tab to access add t ona Exce commands and features

9 C ck n a b ank area of the notes f e d to stop ed t ng the Exce object

10 C ck Send Update to send the meet ng tem w th the embedded Exce object



TIP Reminders display even if the Calendar item is overdue. For example, if an event was set for Saturday and you didn't turn on your computer that day, the next time you start Windows the reminder for that event appears. You can dismiss the reminder at that point.

www.it-ebooks.info

Sharing calendar information

With Outlook 2013, you can share Calendar information with others. You can forward a Calendar item by email to other Outlook users, or you can forward an iCalendar item to any user of any Internet-connected mail program. You should use iCalendar when you schedule meetings with people who don't use Outlook.

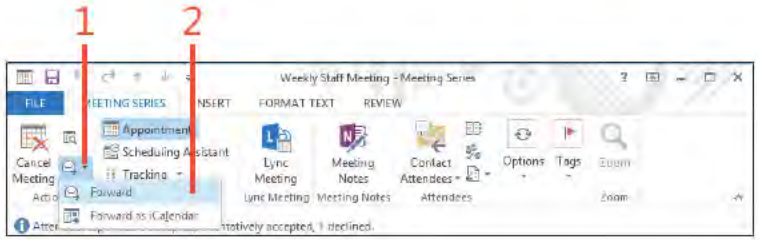
Forward a calendar item

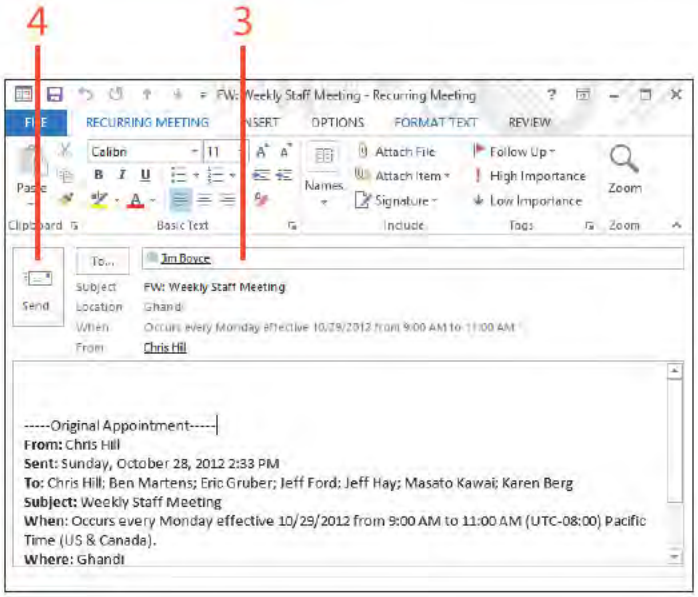
1 Open an ex st ng meet ng tem On the Meet ng Ser es tab, n the Act ons group, c ck the drop-down arrow on the Forward button

2 Choose Forward

3 Add one or more rec p ents n the To box

4 C ck Send





TIP If you forward a calendar item that has an attachment, that attachment is forwarded along with the calendar item.

www.it-ebooks.info

Forward an item as an iCalendar item

1 Open an ex st ng meet ng tem On the Meet ng Ser es tab, n the Act ons group, c ck the drop-down arrow on the Forward button

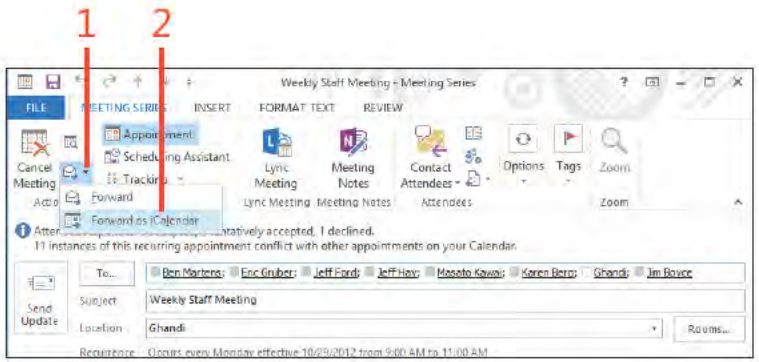
2 Choose Forward As Ca endar

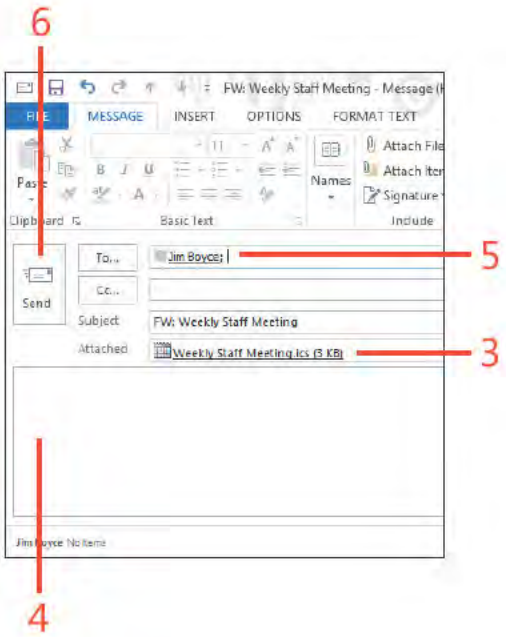
3 The Ca endar attachment appears n the Attached f e d

4 Add one or more rec p ents n the To box

5 Add notes as des red

6 C ck Send





TIP iCalendar is for communicating with people who don't use Outlook. If you want to forward a calendar item to someone who uses Outlook, on the Actions menu, click the Forward command, or, in the Actions group on the meeting form's ribbon, click Forward.

www.it-ebooks.info

Printing calendars

You can print your Outlook 2013 appointment calendar, such as your daily or weekly appointments, meetings, and events, or you can print an individual calendar item such as a meeting item.

Print your appointment calendar

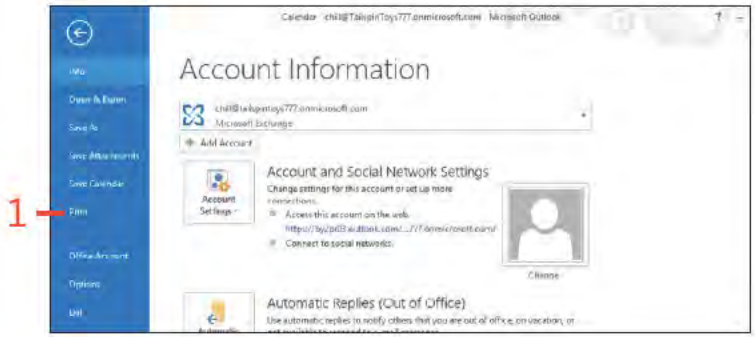
1 Open the Ca endar fo der, c ck the F e tab to d sp ay the Backstage v ew, and then c ck the Pr nt tab

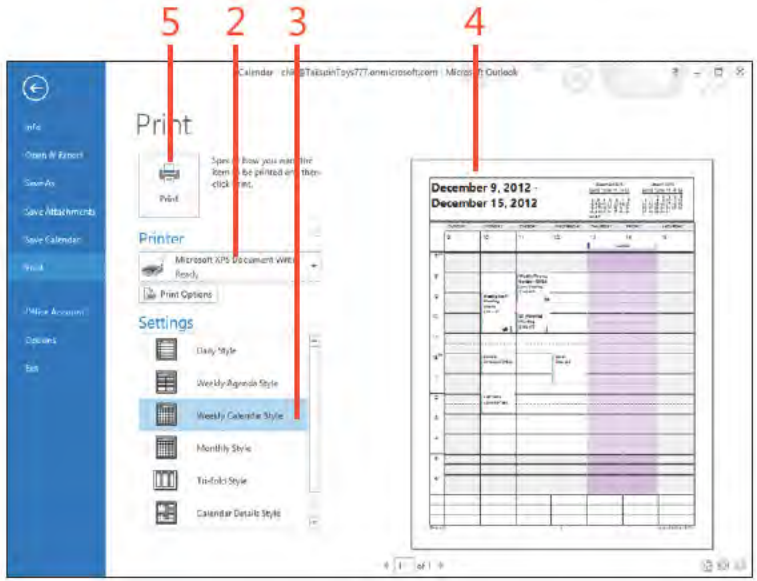
2 In the Pr nter sect on, choose a pr nter

3 In the Sett ngs sect on, choose a ca endar sty e

4 Prev ew the resu ts

5 C ck Pr nt





TIP You can print your calendars in Daily, Weekly, Monthly, Tri-fold, Calendar Detail, and Memo Style. Try printing your calendar in each one of these styles and then pick your favorite one.

TRY THIS! Print your appointment calendar at the beginning of each week so that you can keep track of all your upcoming events, appointments, and meetings. As schedules change, such as a meeting being delayed or canceled, make these changes on the hard copy as well as in Outlook. If too many changes occur, you might need to print a fresh calendar.

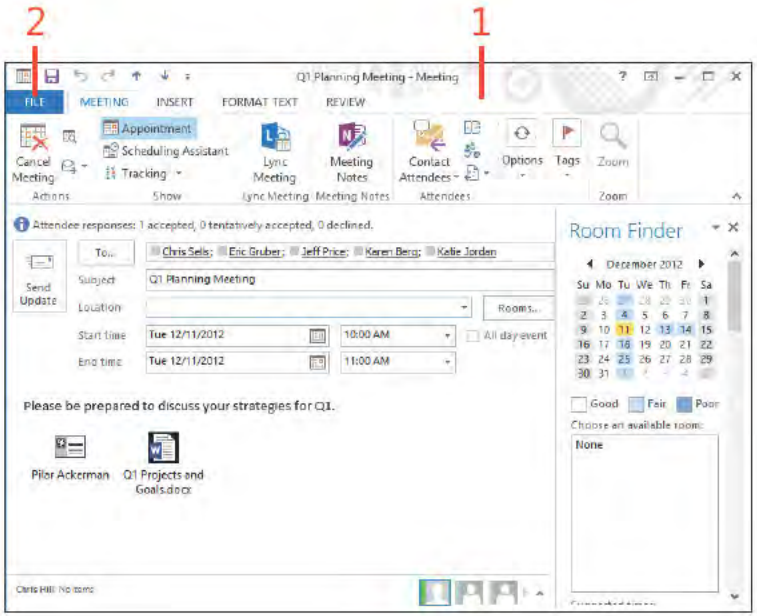
www.it-ebooks.info

Print a calendar item

1 Open the ca endar tem that you want to pr nt

2 C ck the F e tab to d sp ay the Backstage v ew

(continued on next page)



TIP If you want to print to a printer other than the default one, click the Printer drop-down list and select the printer.

www.it-ebooks.info

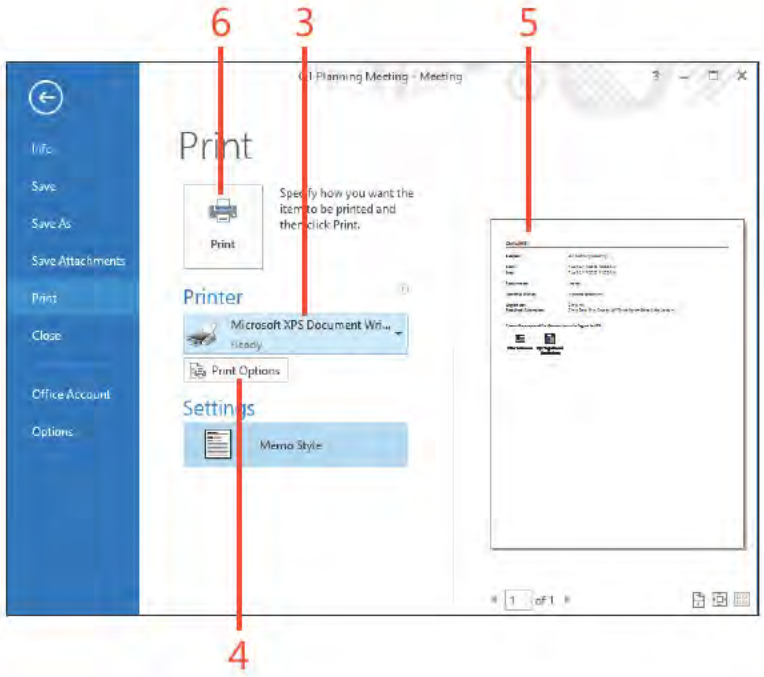
Print a calendar item *(continued)*

3 C ck the Pr nt tab and then, n the Pr nter sect on, choose a pr nter

1 4 Choose other pr nt opt ons such as pr nt ng attachments n add t on to the meet ng tem

5 Prev ew the resu ts

6 C ck Pr nt



TIP Attachments within an item will not print automatically, but you can use the Print Options button on the Print page to print the attachments.

www.it-ebooks.info

www.it-ebooks.info

Working with tasks

8

At one time or another, most of us have written a to-do list—a list of tasks that we need to perform. Maybe you put together a list of the improvements or repairs you want to make to your house. Maybe it's something simpler such as a list of errands to run. Whatever the case, having a list of the tasks can be valuable for keeping you on track.

Microsoft Outlook 2013 includes a feature to help you keep your pending tasks in mind. The Tasks folder stores your to-do list. You can create tasks for yourself, assign them a due date, and easily mark them as completed. You can create one-time tasks or recurring tasks. Outlook also lets you assign tasks to others and receive status updates on the tasks from the people to whom you assign them. This section explains how to use the Tasks folder to create and manage one-time and recurring tasks as well as how to assign tasks to others.

In this section:

- Working in the Tasks folder
- Viewing tasks
- Adding tasks
- Working with recurring tasks
- Modifying and updating a task
- Inserting an Outlook item into a task
- Inserting a file into a task
- Assigning a task to someone else
- Accepting or rejecting assigned tasks

www.it-ebooks.info

Working in the Tasks folder

Outlook 2013 includes a Tasks folder that you can use to store your tasks as well as those that you assign to others. The Tasks folder offers a variety of ways to view and work with your tasks, including the daily task list that appears at the bottom of the calendar and the Tasks List in the To-Do Bar.

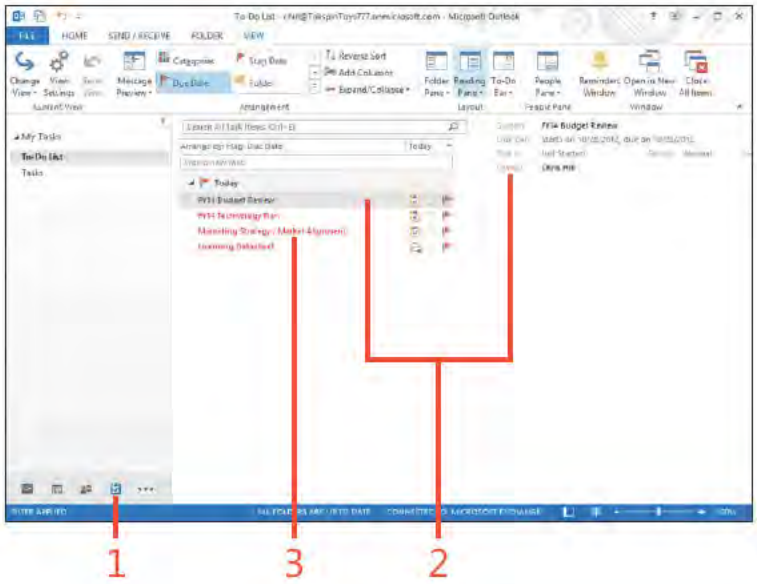
View and open tasks

1 In the Fo der pane, c ck the Tasks con (or word) to open the Tasks fo der

2 C ck a task that you want to prev ew n the Read ng pane

3 Doub e-c ck a task to open the task's form (or doub e-c ck n the Tasks fo der to start a new task)

(continued on next page)



TIP Outlook provides several different views for the Tasks folder, and you can easily create your own views to suit your needs.

www.it-ebooks.info

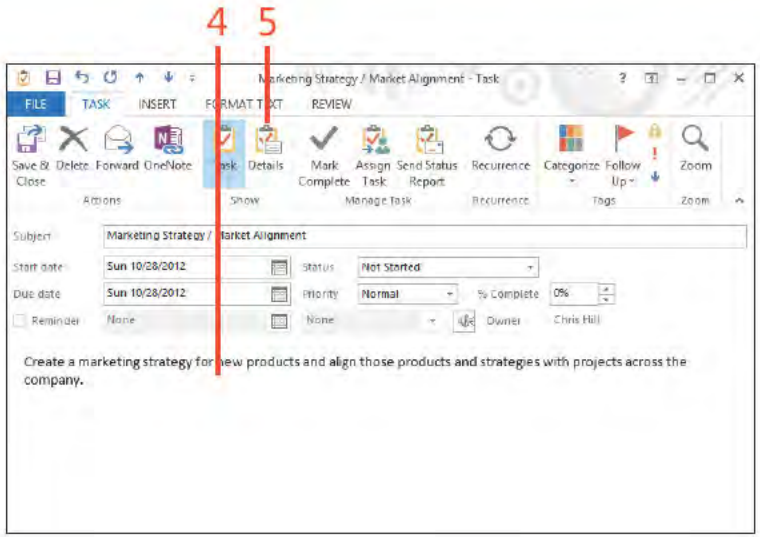
View and open tasks *(continued)*

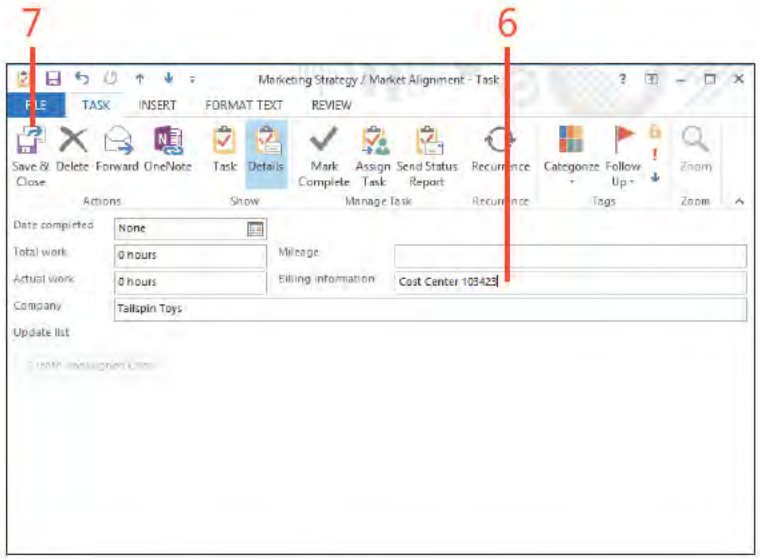
4 Add notes or other nformat on as needed

5 On the Task tab, n the Show group, c ck Deta s

6 Add other nformat on on the Deta s page

7 Back on the r bbon, n the Act ons group, c ck Save & C ose





TIP When you create a task, Outlook doesn't set up a reminder for the task by default, but you can add one later. Open the task and then, on the ribbon, click the Task tab. In the Tags group, click Follow-Up and then click Add Reminder. In the Custom dialog box that opens, add a reminder. You can also select the Reminder check box on the Task form and set a reminder directly on the form.

www.it-ebooks.info

Viewing tasks

With Outlook 2013, you can view your task list in various locations in Outlook so that you can not only access your task items to work on them, but also see a summary list of all your pending tasks, tasks due that day, and so on. You can view your tasks in the Tasks folder, or you can use the task list in the Calendar and To-Do Bar to view and work with tasks.

View tasks in the Tasks folder

1 At the bottom of the Fo der pane, c ck the Tasks con to open the Tasks fo der

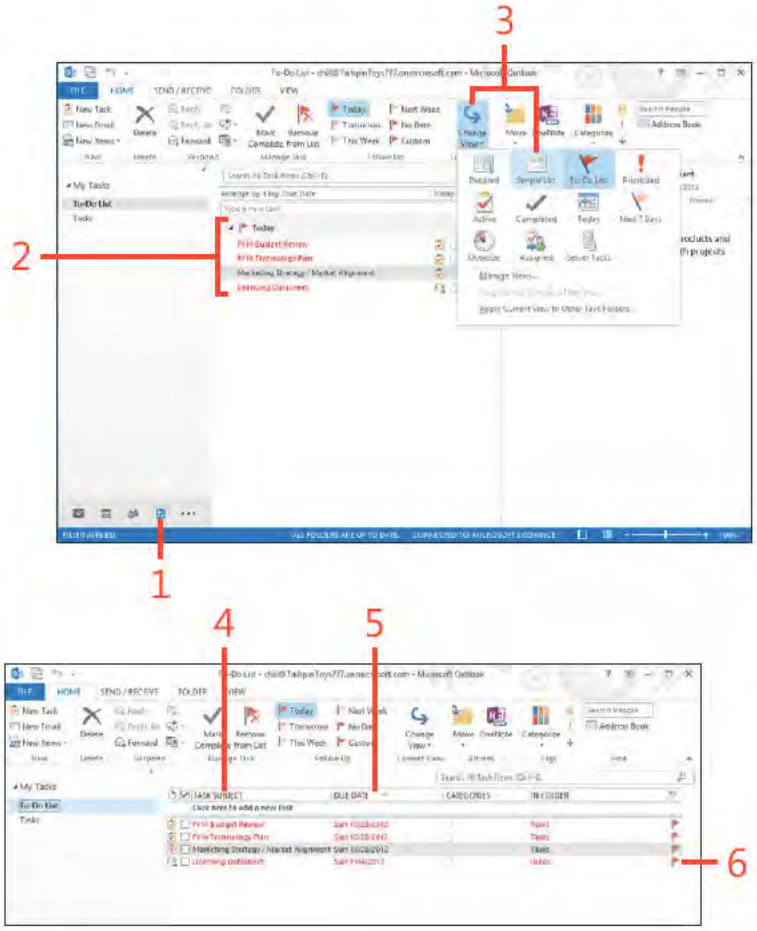
2 C ck a task that you want to prev ew n the Read ng pane

3 On the Home tab, n the Current V ew group, c ck Change V ew and then, n the ga ery that opens, choose S mp e L st

4 To sort the st by subject, c ck the Subject co umn

5 To restore the defau t sort method, c ck Due Date

6 To mark the task as comp ete, se ect the f ag bes de the task's subject



TRY THIS! You can add and remove columns from the task list to show the task data most important to you. Right-click the column header and then, on the shortcut menu that opens, click Field Chooser. In the Field Chooser dialog box, click a column and drag it to the column header. To remove a column, drag it from the column header to the Field Chooser dialog box. Note that you must widen some views or turn off the Reading pane to accomplish this with some views (such as the To-Do Bar).

TIP If you're using a view that includes the Complete check box, just select the check box to mark a task as complete.

www.it-ebooks.info

View tasks in the To-Do Bar

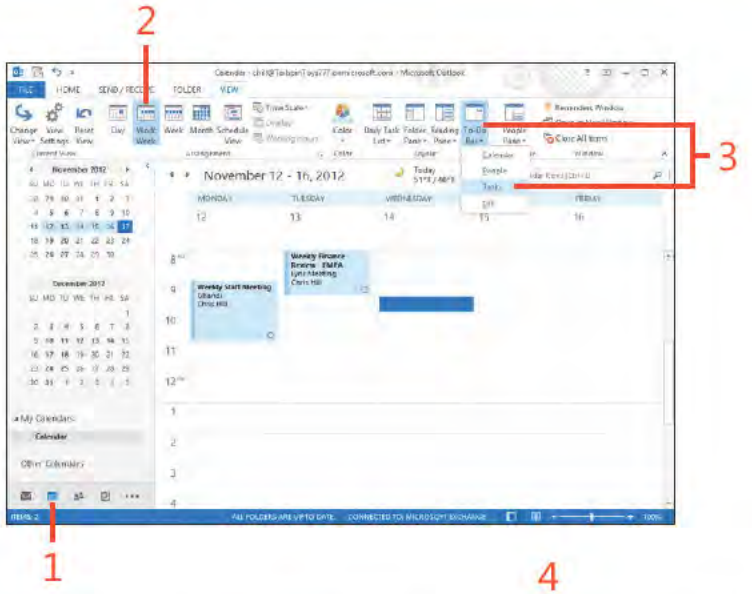
1 At the bottom of the Fo der pane, c ck the Ca endar con to open the Ca endar fo der

2 On the Home tab, n the Arrangements group, c ck the Work Week button

3 In the Layout group, C ck the To-Do Bar button and then, n the drop-down st that appears, choose Tasks

4 V ew the tasks n the task st

5 Se ect the f ag bes de a task to mark t as comp ete



TIP If you don't see the To-Do Bar, on the ribbon, on the View tab, click To-Do Bar and choose Tasks.

TRY THIS! The Outlook Today view includes a simplified task list that shows the subject and completion status. You can click a task's subject to open the task to view its details or modify it. Select the check box beside a task to mark it as complete.

www.it-ebooks.info

Adding tasks

Tasks can be added to your Outlook 2013 Tasks folder in one of two ways. You can create the task yourself, or you can accept a task that someone else assigns to you. If you create the task yourself, you can set it up by using the New Items button on the Home tab for any folder, or you can create it through the Tasks folder.

Create a new task

1 At the bottom of the Fo der pane, c ck the Tasks con to open the Tasks fo der

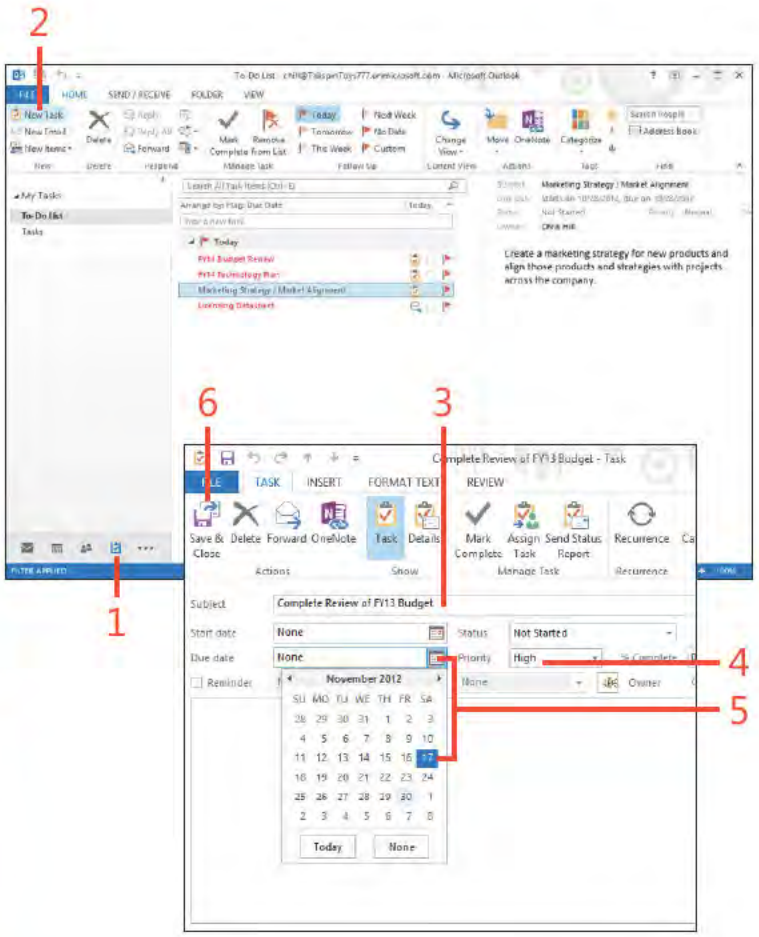
2 On the Home tab, n the New group, c ck the New Task button

3 Type a subject for the task

4 In the Pr or ty st box, choose a pr or ty

5 On the Due Date drop-down ca endar, choose a due date

6 C ck Save & C ose



TRY THIS! With any folder open, you can use the New Items button on the Home tab to open a new task form and create the task. Click the New Items button and then, on the menu that appears, click Task to open the new task form.

TIP The Status and % Complete properties are connected. If you specify some percentage less than 100% in the % Complete field, Outlook changes the Status field to In Progress. Setting % Complete to 0 changes Status to Not Started. Setting % Complete to 100% causes Outlook to set Status to Completed. Likewise, setting Status to Completed sets % Complete to 100%.

www.it-ebooks.info

Set or change task properties

1 Doub e-c ck the task that you want to change

2 Set the task status

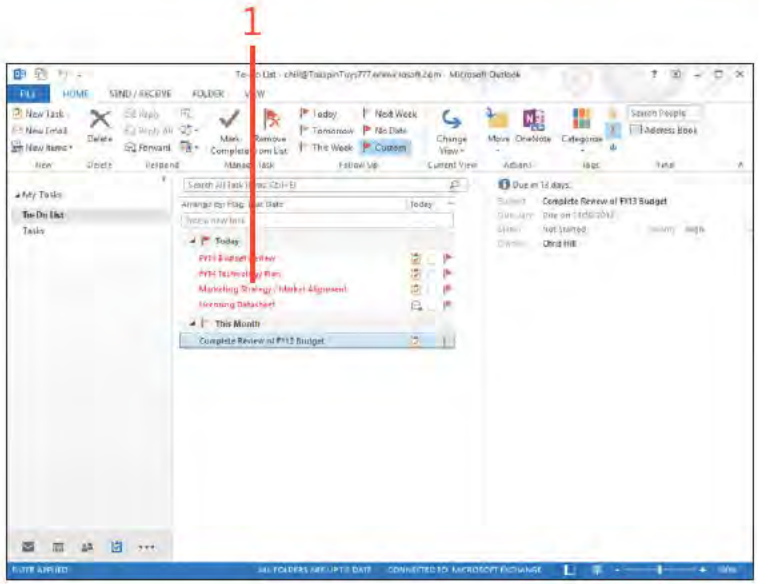
3 Spec fy the current percent comp et on

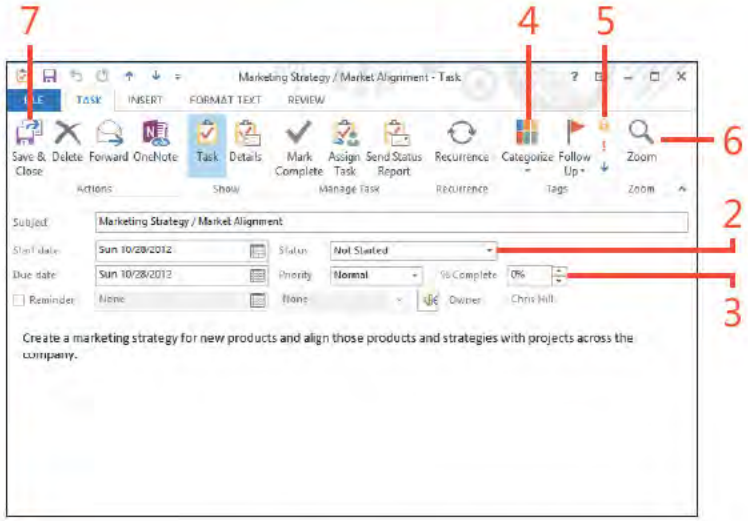
4 On the Task tab, n the Tags group, c ck the Categor ze button to categor ze the task

5 A so n the Tags group, c ck the ock con to mark the task as pr vate

6 C ck the Zoom button to change the s ze of text n the notes f e d

7 C ck Save & C ose to keep the changes





TIP You can set reminders for tasks just as you can for calendar items.

SEE ALSO For more information about working with reminders, see "Working with reminders" on page 182.

www.it-ebooks.info

Working with recurring tasks

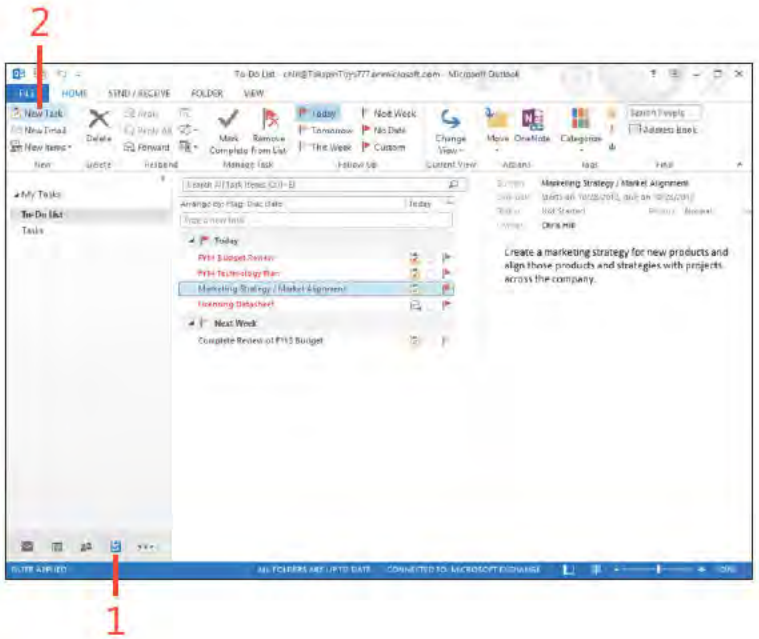
Some tasks that you create in Outlook 2013 are of a recurring nature—they repeat on a regular basis. For example, maybe you have to prepare a set of reports every Friday that summarizes the week's sales or other information. Or perhaps you need to back up your files every week. Although a recurring task shows up only once in the task list, it appears in the tasks lists in the calendar and on the To-Do Bar when the assigned due date falls in the list's range. If you set a reminder for the task, you receive the reminder for each recurrence of the task.

Create a recurring task

1 At the bottom of the Fo der pane, c ck the Tasks con to open the Tasks fo der

2 On the Home tab, n the New group, c ck the New Task button, or open an ex st ng task

(continued on next page)



TRY THIS! On the ribbon, on the Tags tab, use the Private button in the Tags group to prevent your delegates from seeing the task in your task list.

TIP If you set a recurring task with no end date, you can still revise the task's properties to make it end after a specified number of occurrences or specified date. Just open the task's properties, click Recurrence to open the Task Recurrence dialog box, choose the end option that you want, and then click OK. Then, click Save & Close to save the changes.

www.it-ebooks.info

Create a recurring task *(continued)*

3 Set the Subject, Start Date, and other nformat on for the task

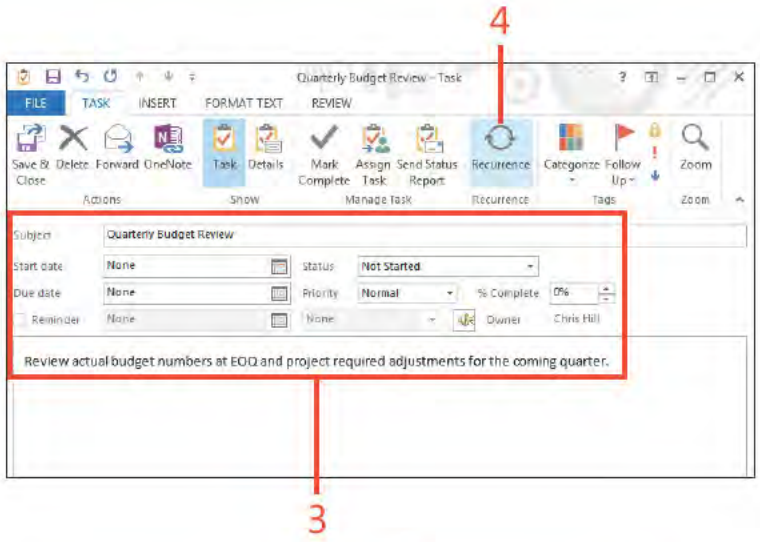
4 On the Task tab, c ck the Recurrence button to open the Task Recurrence d a og box

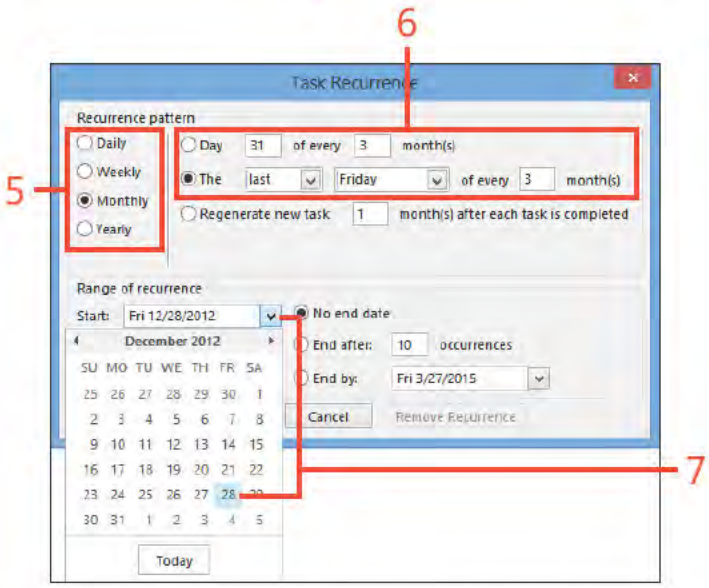
5 In the Recurrence Pattern sect on, se ect the type of recurrence

6 Spec fy how often the task shou d recur

7 In the Range Of Recurrence sect on, on the drop-down ca endars, set the start and end of the recurrence per od and c ck OK

(continued on next page)





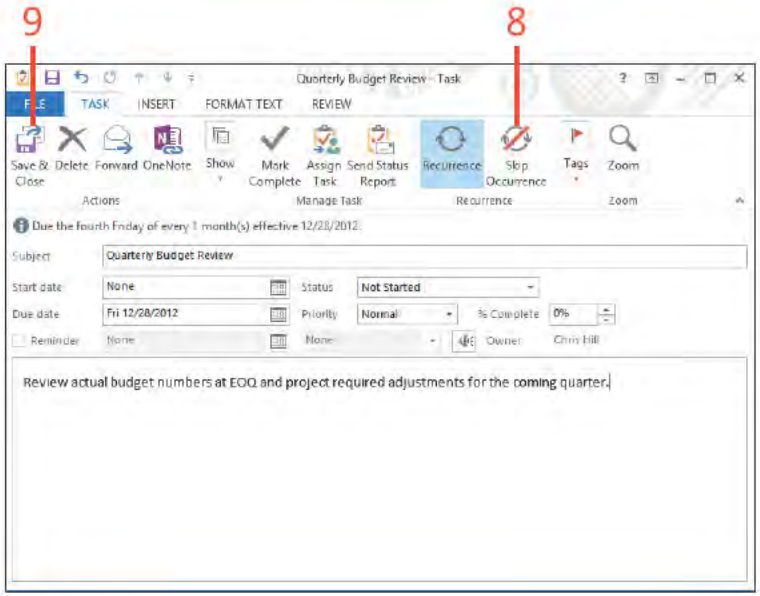
TIP Select the Recur Every option in the Task Recurrence dialog box when you want the task to recur even if the previous occurrence hasn't been completed. Select the Regenerate New Task option if you want the task to recur only after the last occurrence is complete.

www.it-ebooks.info

Create a recurring task *(continued)*

8 On the Task tab, in the Recurrence group, click Skip Occurrence to skip the current occurrence of the task

9 Click Save & Close to close the task's form



TRY THIS! You can make a recurring task nonrecurring by opening a task's form, clicking Recurrence on the toolbar to open the Task Recurrence dialog box, and then clicking Remove Recurrence.

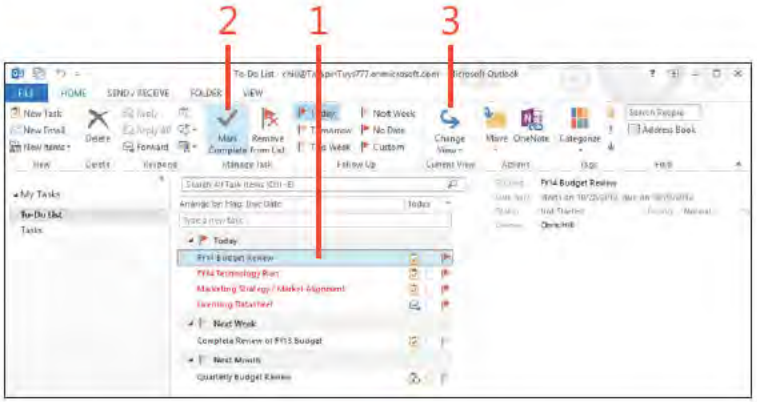
www.it-ebooks.info

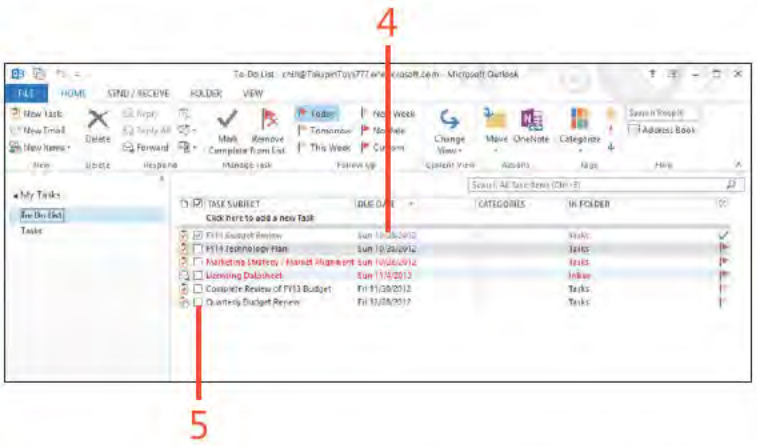
Modifying and updating a task

You can modify a task in Outlook 2013 at any time to change any property, including subject, due date, recurrence, and so on. Another change you might want to make to tasks is to mark them as complete so that you can see at a glance the tasks that are finished and those that are not. You can also change the view of the Tasks folder to show only tasks that are complete, only tasks that are overdue, only those that are incomplete, and so on. In addition to marking tasks complete, you probably want to delete completed tasks and send status updates for tasks that are assigned to you.

Mark a task as complete

1. Se ect the task
2. On the Home tab, n the Manage Task group, c ck the Mark Comp ete button
3. C ck Change V ew and then choose S mp e L st
4. Out ook uses str kethrough to nd cate that a task has been comp eted
5. Se ect the check box to mark a task as comp ete





TIP You can select the check box next to a task on the Tasks List (Day, Week, or Work Week views in the calendar) to mark a task as complete.

TRY THIS! You can mark a task complete by setting its percent complete value to 100%. Open the task and use the arrow button beside the % Complete option to set the value to 100%. Outlook marks the task as complete.

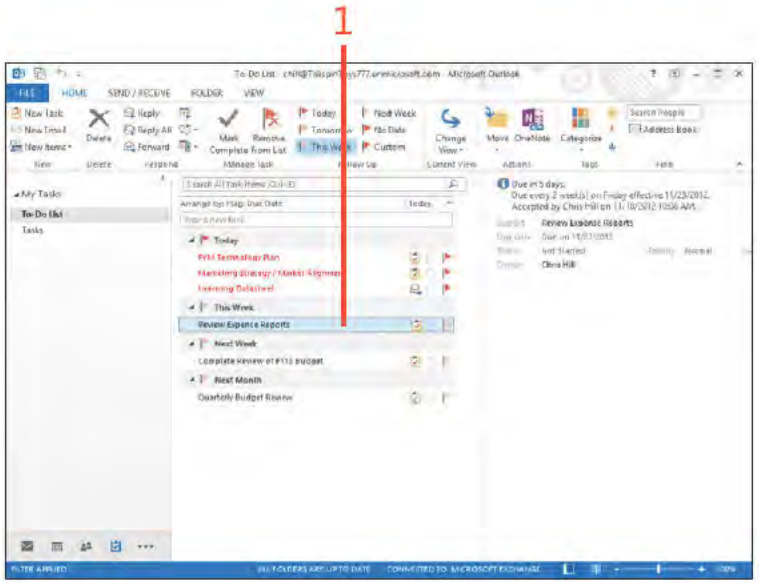
www.it-ebooks.info

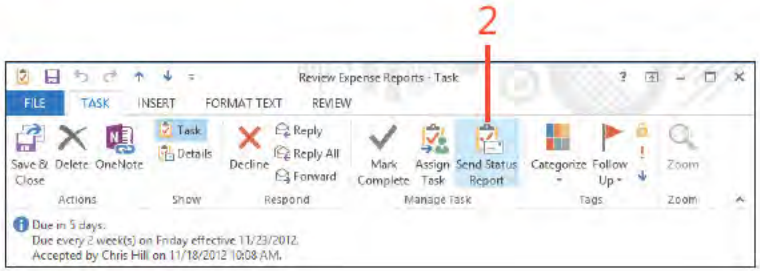
Send a status report for an assigned task

1 Doub e-c ck the ass gned task to open ts form

2 Make changes to the task as needed and then, on the Task tab, n the Manage Task group, c ck Send Status Report

(continued on next page)





TIP To delete a task, select the task and then, on the Home tab, click Delete.

TRY THIS! You can send a copy of a status report to a person not on the update list without letting the people on the list know that you've copied that person. Just use the Bcc field to address the message to the other person. If Outlook isn't currently showing the Bcc field, on the Options tab, in the Show Fields group, click Show Bcc.

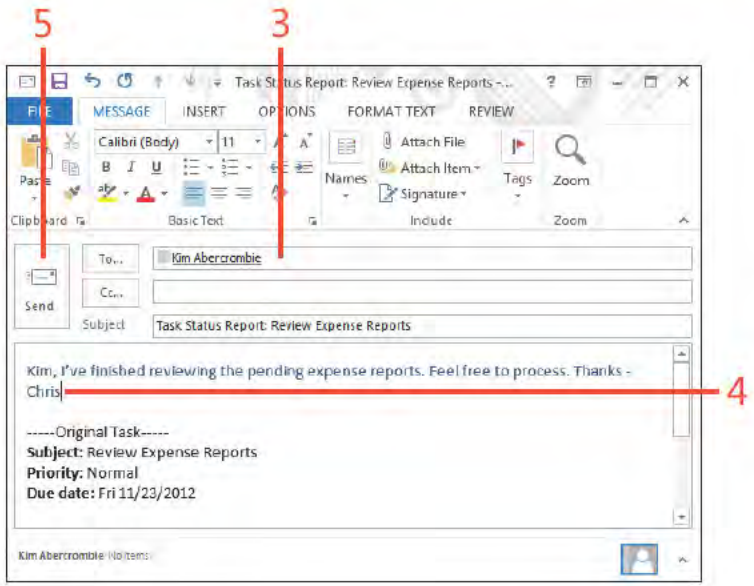
www.it-ebooks.info

Send a status report for an assigned task *(continued)*

3 After Out ook adds the ass gner's address, c ck To or Cc to add others f needed

4 Add notes as needed

5 C ck Send



SEE ALSO For more information about assigning tasks to others, see "Assigning a task to someone else" on page 174.

TIP Outlook fills in the status information in the body of the update message for you. You can edit this text if you need to. Just highlight the text that you want to change and type the replacement text.

www.it-ebooks.info

Inserting an Outlook item into a task

When you create a task in Outlook 2013—whether you create the task for yourself or assign it to someone else—you might want to add items to the task. For example, assume that you're going to assign a task to someone else, and that person needs a copy of a Microsoft Word document to perform the task. You can attach the document to the task. Or, perhaps you need to include some contacts with a task. Whatever the case, it's easy to insert Outlook items, objects, and files into a task.

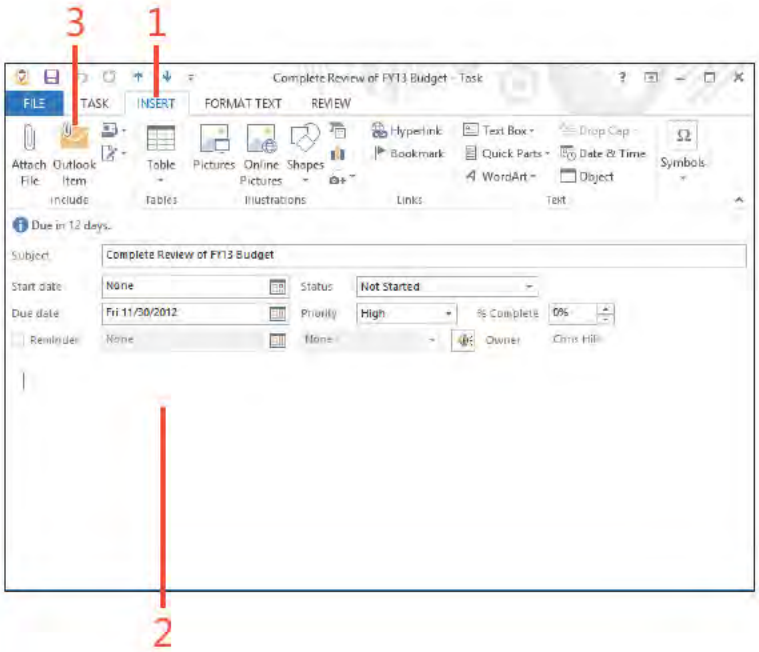
Insert an Outlook item

1 Open a task and then, on the r bbon, c ck the Insert tab

2 C ck n the notes area of the task

3 Back on the r bbon, n the Inc ude group, c ck Out ook Item

(continued on next page)



TIP You can insert a file as a hyperlink rather than as an attachment, which makes it possible to open the task from its source rather than included in the task. The main benefit of this method is that you don't duplicate the document but instead create a shortcut to it. The limitation is that everyone who receives the message must have access to wherever the file is stored. To insert a hyperlink in a task, open the task and then, on the Insert tab, click Attach File. In the Insert File dialog box that opens, select the file, click the arrow beside the Insert button, and then choose Insert As Hyperlink.

www.it-ebooks.info

Insert an Outlook item *(continued)*

4 In the Insert Item d a og box, se ect the Out ook fo der that con-ta ns the object that you want to nsert

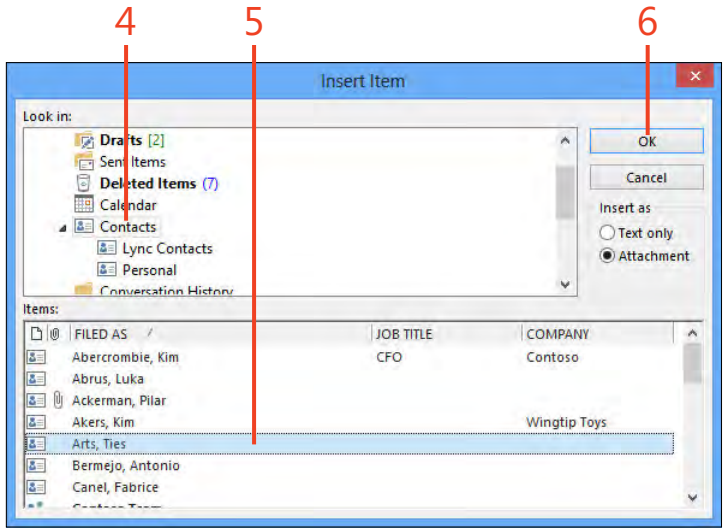
5 Se ect the tem to nsert

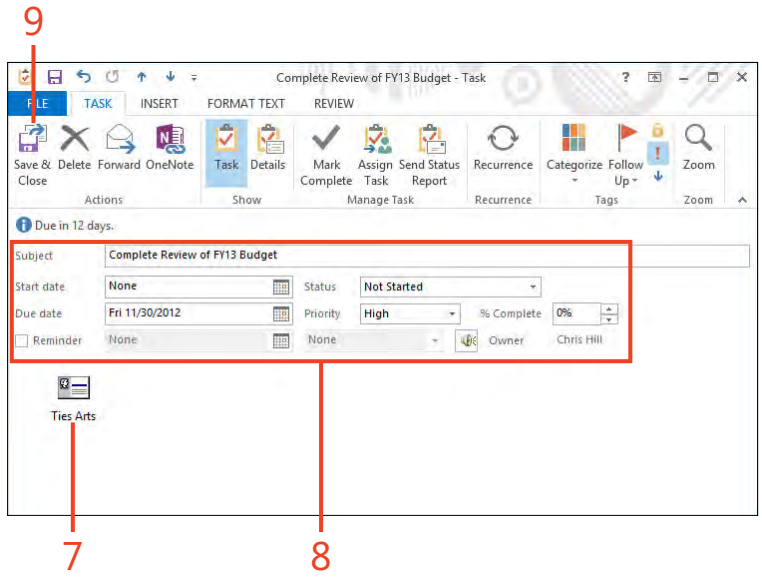
6 C ck OK

7 Ver fy that the attached tem appears n the notes area of the task

8 C ck the Task tab and change other task f e ds as needed

9 C ck Save & C ose





www.it-ebooks.info

Inserting a file into a task

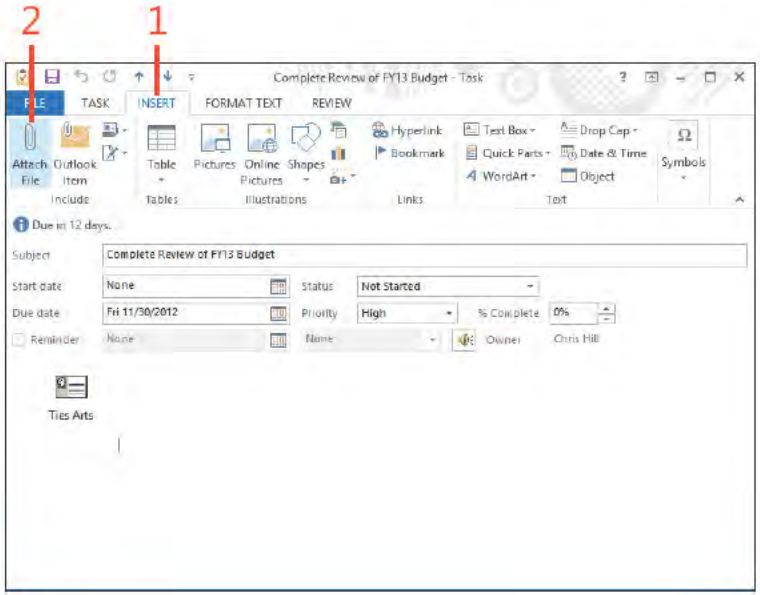
In addition to inserting Outlook items, you can insert documents and other types of files. For example, you might want to insert a project plan, report, or other document into a task so that when you're working on that task, you have the documents handy.

Insert a file

1 Open a task and then, on the r bbon, c ck the Insert tab

2 In the Inc ude group, c ck Attach F e

(continued on next page)



TIP When you insert a file as a hyperlink, Outlook inserts the path to the document. If you insert a file from your local computer, the path uses the local drive letter. This method works fine for creating hyperlinks to documents you use, but it doesn't work when you assign tasks to other people because clicking the link on their end causes Outlook to try to open the file from their computers. However, you can link files on network servers in tasks that you assign, as long as you view the server through a UNC path rather than a mapped drive. A UNC path takes the form *\\server\folder*, where *server* is the name of the server and *folder* is the name of the shared folder on the server on which the document is located. Likewise, you can link to a file on a SharePoint site by copying the URL for the SharePoint item into the task.

www.it-ebooks.info

Insert a file *(continued)*

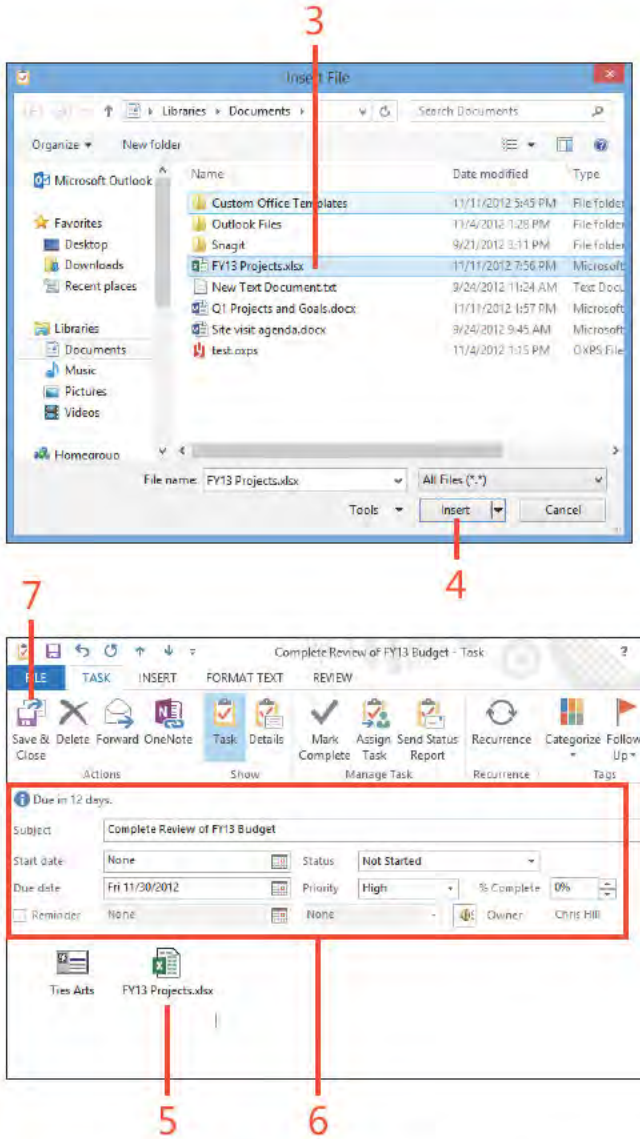
3 In the Insert F e d a og box, se ect the f e that you want to nsert

4 C ck Insert to nsert the f e

5 Not ce that the f e appears as an con n the task

6 Add other nformat on to the task as you need to

7 On the Task tab, n the Act ons group, c ck Save & C ose



SEE ALSO For more information about attaching files to email messages rather than adding them to tasks, see "Sending a file by email" on page 56.

www.it-ebooks.info

Assigning a task to someone else

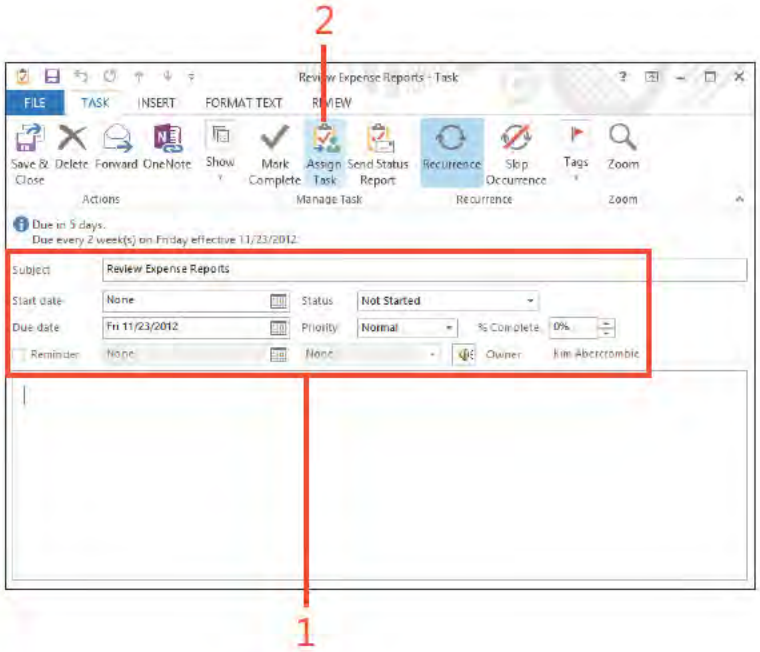
If you manage others and use Outlook in your organization for email and collaboration, you probably want to assign tasks to others. Outlook 2013 sends the task assignment as an email message, and the assignee has the option of accepting or rejecting the task. When you assign a task, you define a status update distribution list. The people on that list receive status reports when the assignee makes changes to the task.

Assign a task

1 Create a new task and f n task propert es as needed

2 On the Task tab, n the Manage Task group, c ck Ass gn Task

(continued on next page)



TRY THIS! If you want to pass the buck and reassign a task that was assigned to you to someone else, accept the task and open it. On the Task tab, in the Manage Task group, click Assign Task. Then, assign it by typing someone's name or by selecting a name from your address list.

SEE ALSO For information about how to include a document with a task you assign to someone else, see "Inserting items into a task" on page 100.

www.it-ebooks.info

Assign a task *(continued)*

3 Spec fy the ass gnee

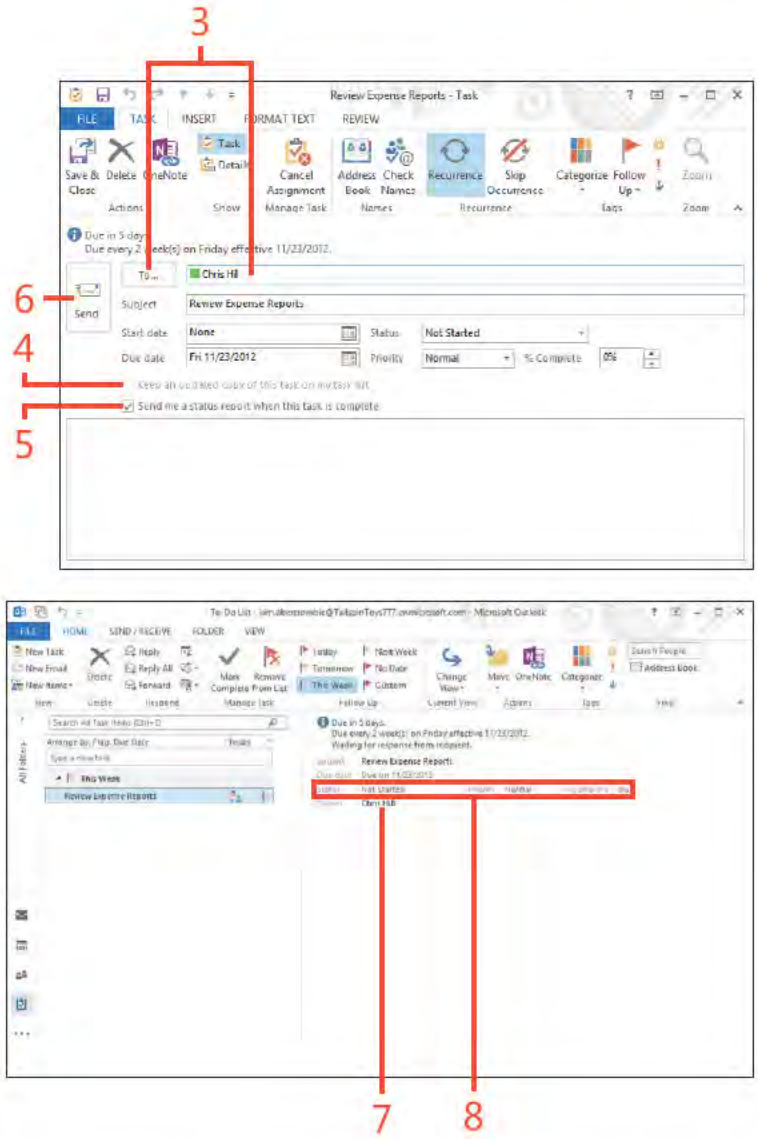
4 Se ect the Keep An Updated Copy Of Th s Task On My Task L st check box to have Out ook keep track of the ass gned task w th a copy on your own task st that updates as the ass gnee works on the task

5 Se ect the Send Me A Status Report When Th s Task Is Comp ete check box to have Out ook send you a status report when the ass gnee comp etes the task

6 C ck Send

7 Ver fy that the ass gnee appears as the owner of the task

8 The status updates as the ass gnee sends back status reports



TIP When you assign a task to another person, a copy of the task request message goes into your Sent Items folder. If you open the message, its form shows a status message indicating that Outlook is waiting for a response from the assignee. This message changes after the assignee either accepts or rejects the task.

www.it-ebooks.info

Accepting or rejecting assigned tasks

If someone assigns a task to you, the task assignment comes to you in the form of an email. You then must either accept or reject the task. Or, you can accept the task and then assign it to someone else.

Accept or reject an assigned task

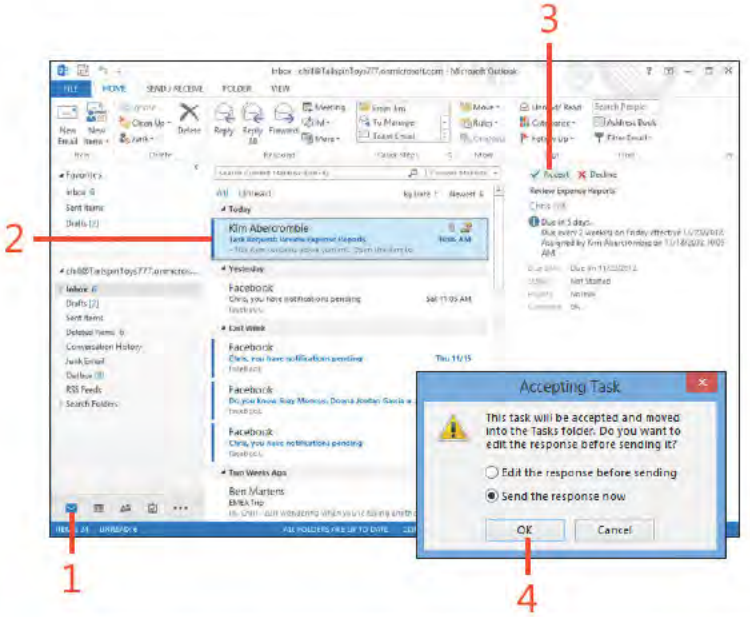
1 At the bottom of the Fo der pane, c ck the Ma con and open the Inbox

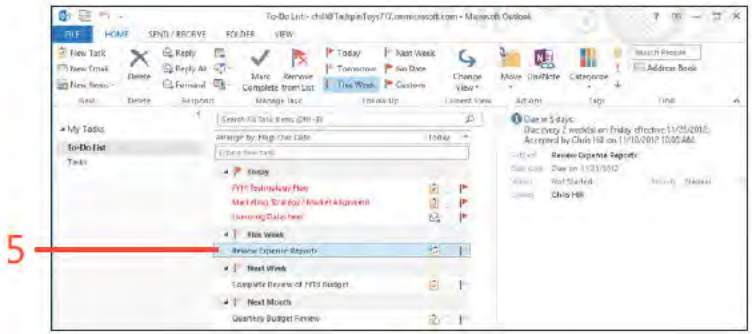
2 C ck the Task Request message to se ect t If the Prev ew pane s not open, doub e-c ck the message to open t

3 C ck Accept to accept the task (or c ck Dec ne to dec ne t)

4 In the Accept ng Task d a og box, c ck OK

5 The task now appears n the ass gnee's Tasks fo der





TIP When you reassign a task that someone has assigned to you and that third person accepts the task, Outlook sends an acceptance notice to you and to the task's originator. The status update list then includes the originator's address and yours, so you receive status updates along with the originator.

TIP When you accept or reject a task, Outlook deletes the task request message from your Inbox. You can't control this behavior to prevent Outlook from deleting the message. However, Outlook keeps copies in your Sent Items folder of task requests that you create.

www.it-ebooks.info

Using alerts and mobile features

9

Microsoft Outlook 2013 offers some great mobility features to help you integrate it with your mobile devices. In particular, you can configure Outlook to send alerts to your cell phone when you receive important email or voice messages. Outlook can also send you reminders about appointments and meetings and a daily summary of your day's schedule. These features can help you arrive at your meetings on time and stay abreast of important email when you're out of the office.

In this section:

- Setting up your mobile phone in Microsoft Exchange
- Setting up calendar alerts
- Setting up mobile alerts for important messages

www.it-ebooks.info

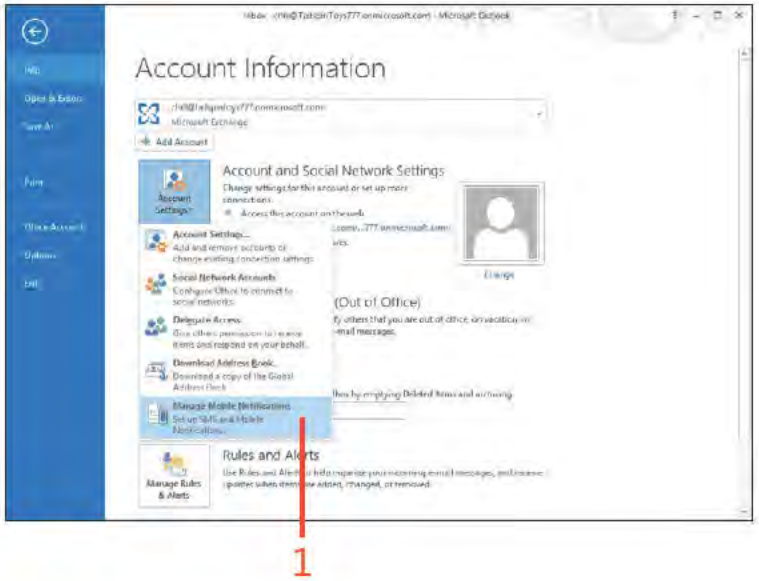
Setting up your mobile phone in Microsoft Exchange

Before you can receive alerts on your mobile device, you must configure your Exchange Server account settings to specify your mobile device number. (Note that your Exchange administrator might already have set it up.) If your Text Messaging page shows a Delete Settings button rather than a Turn On Notifications button, your mobile device is already configured for notifications through Exchange.

Add your mobile number

1 C ck the F e tab to d sp ay the Info page n the Backstage v ew, c ck the Account Sett ngs buttons, and then, n the drop-down st that opens, c ck Manage Mob e Not f cat ons

(continued on next page)



TIP If the Manage Mobile Notifications option is missing from the Account Settings menu in Outlook, open Internet Explorer and browse to *https://YourMailServer/ecp*, where *YourMailServer* is the address of your Exchange Server. Then, log on using your domain credentials.

www.it-ebooks.info

Add your mobile number *(continued)*

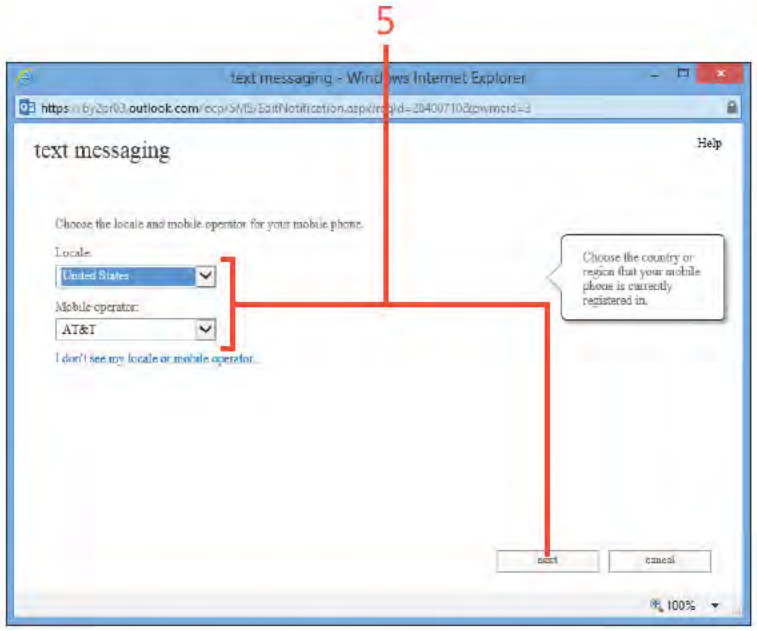
2 In the browser w ndow that opens, n the Opt ons sect on, c ck Phone

3 C ck Text Messag ng

4 C ck Turn On Not f cat ons

5 In the Text Messag ng W zard that opens, choose your oca e and ce prov der and then c ck Next

(continued on next page)



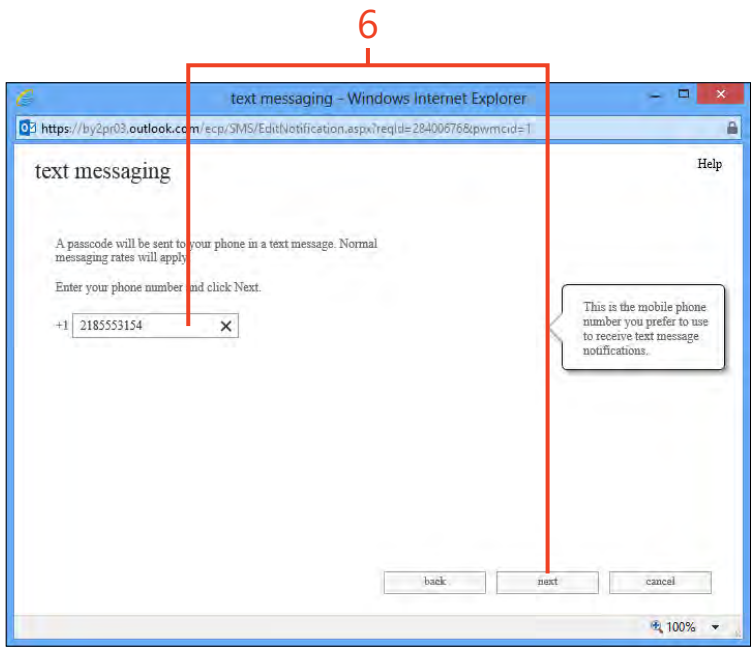
TIP The email and calendar alert features described in this chapter require an Exchange Server 2010 or later mailbox. The voice mail alerts also require that the mailbox user be enabled for unified messaging.

www.it-ebooks.info

Add your mobile number *(continued)*

6 Enter your phone number and then c ck Next

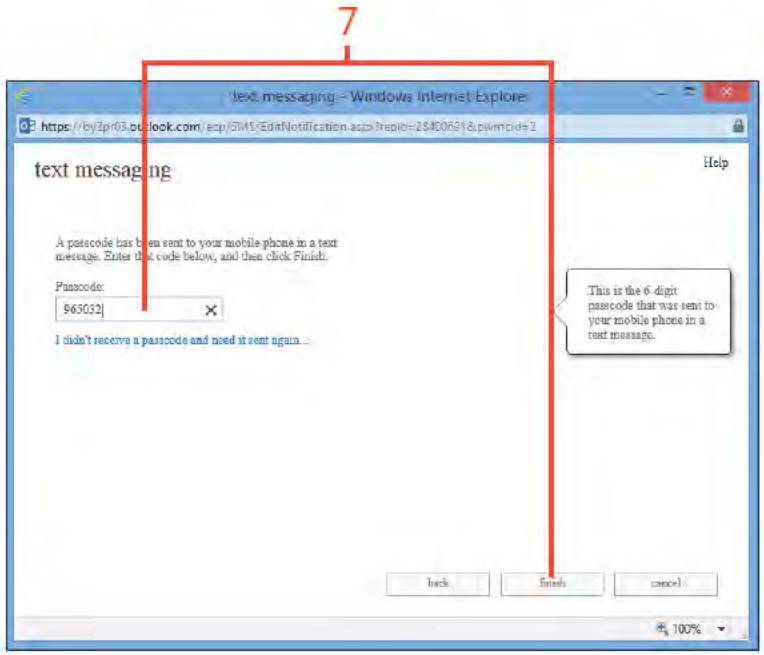
(continued on next page)



www.it-ebooks.info

Add your mobile number *(continued)*

7 A passcode s sent to your phone; enter the passcode and c ck F n sh



TIP Exchange Server sends a text message to your mobile device to let you know when you have successfully completed the alert setup process.

www.it-ebooks.info

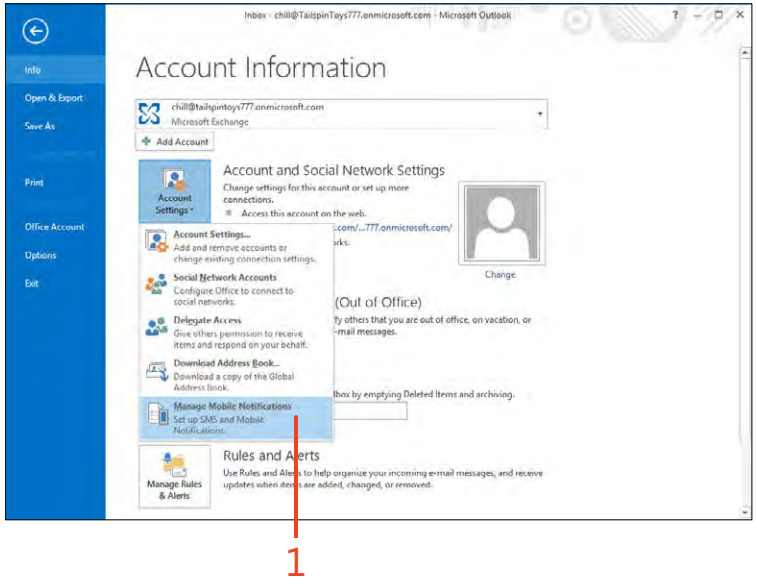
Setting up calendar alerts

Using calendar alerts, you can have Exchange Server send alerts to your mobile device when new items are added to your calendar or existing items are updated. This feature is particularly helpful when you're out of the office and an assistant is scheduling or accepting meetings for you. You can also have Exchange Server send reminders for meetings to your mobile device. In addition, you can configure your alert settings to have Exchange Server send a summary of your daily calendar agenda to your mobile device, giving you an easy reference to what's on your schedule for that day. These three features combined can keep you plugged into your schedule all day, even when you're away from your computer.

Add calendar alerts

1 C ck the F e tab to d sp ay the Info page n the Backstage v ew, c ck the Account Sett ngs buttons, and then, n the drop-down st that opens, c ck Manage Mob e Not f cat ons

(continued on next page)



www.it-ebooks.info

Add calendar alerts *(continued)*

2 In the browser w ndow that opens, n the Opt ons sect on, c ck Phone

3 C ck Text Messag ng

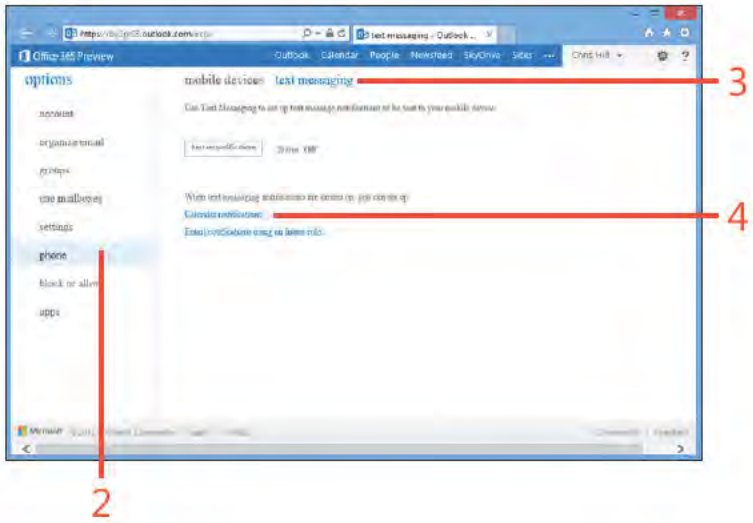
4 C ck the Set Up Ca endar Not f cat ons nk

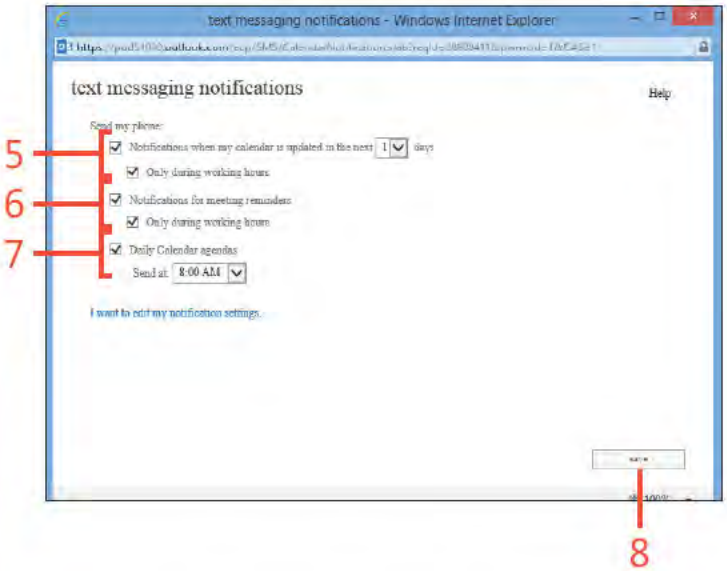
5 In the Text Messag ng Not f cat ons d a og box, opt ona y se ect to have Out ook send a not f cat on when your ca endar s updated

6 Opt ona y se ect to have Out ook send you not f cat ons for meet- ng rem nders

7 Opt ona y se ect to have Out ook send you a ca endar summary at the spec f ed t me

8 C ck Save





TIP If your schedule changes frequently, you might want to use the drop-down control on the Text Messaging Notifications dialog box to specify how many days ahead of its date you want to be notified or reminded of a new or changed calendar item. For example, choose 2 if you want to receive alerts about changes that affect your calendar over the next two days.

www.it-ebooks.info

Setting up mobile alerts for important messages

If you have a mobile device that synchronizes your mailbox to your mobile device, you likely receive email on the device all day long. If not, you might want to configure Exchange Server to send an alert to your mobile device when you receive certain types of messages. For example, you might want it to send you an alert when you receive an email from your manager or an incident management system, or if you get an email that contains specific words in the subject, related to a particular project.

Set up mobile alerts

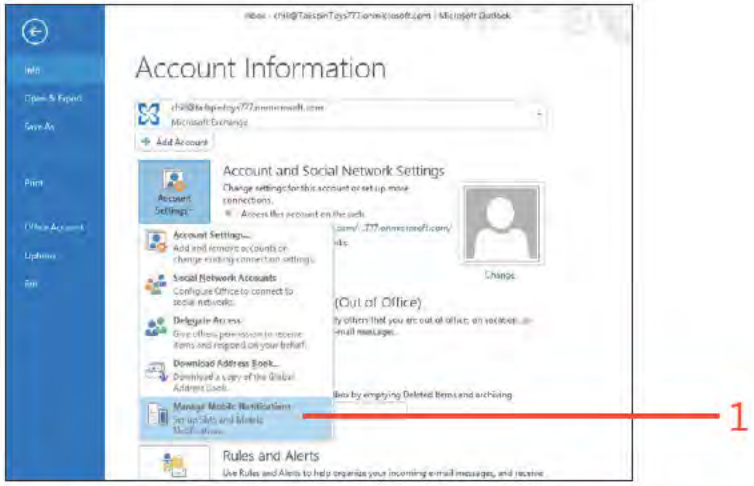
1 C ck the F e tab to d sp ay the Info page n the Backstage v ew, c ck the Account Sett ngs buttons, and then, n the drop-down st that opens, c ck Manage Mob e Not f cat ons

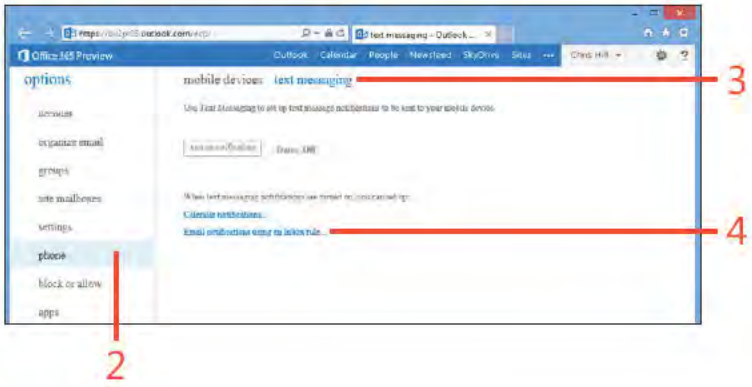
2 In the browser w ndow that opens, n the Opt ons sect on, c ck Phone

3 C ck Text Messag ng

4 C ck the Ema Not f cat ons Us ng An Inbox Ru e nk

(continued on next page)





TIP Even if your mobile device synchronizes with your Exchange mailbox and you receive all email on your mobile device, you might still want to set up alerts. If you receive a lot of email during the day, you probably have configured your mobile device not to alert you when you receive an email. You can create the alert for the types of messages for which you do want to receive notification, and then you can configure your mobile device to notify you with a sound or vibration when you receive a text message. When you get the alert from Exchange Server, you can scroll through the email you've already received to find the one for which you received the alert.

www.it-ebooks.info

Set up mobile alerts *(continued)*

5 In the New Inbox Ru e d a og box, type a name for the ru e

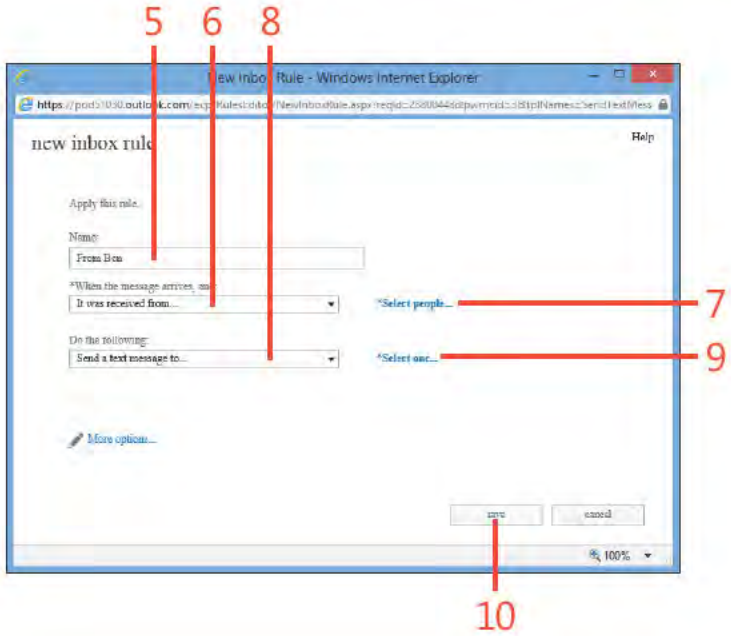
6 Choose a cond t on for the ru e

7 C ck to further def ne the cond t on (such as choose a sender)

8 Choose Send A Text Message To

9 C ck to se ect your mob e dev ce

10 C ck Save



TIP You can click More Options to expand the dialog box to show options that let you add exceptions to the rule. For example, you might add an exception if the message is marked as low priority so that you don't receive alerts for those messages. Or, you might add an exception for messages for which your name is in the Cc field so that you receive alerts only for messages that were sent directly to you.

www.it-ebooks.info

www.it-ebooks.info

Using Outlook with SharePoint

10

Microsoft SharePoint is a leading solution for collaboration. Users can share documents, calendars, contacts, and other information among teams or across entire organizations. When you add SharePoint's process automation and business intelligence features, SharePoint becomes a rich framework for portals, dashboards, records management, and other collaboration features. Although many people work with SharePoint content from their web browsers, that's not the only way to interact with that content. You can use Microsoft Outlook 2013 to work with shared calendars, contacts, and other SharePoint content; you can integrate that content into the application that you probably use much of your day. This section shows you how to integrate SharePoint and Outlook.

In this section:

- Using SharePoint calendars with Outlook
- Using SharePoint contacts in Outlook
- Using SharePoint document libraries in Outlook

www.it-ebooks.info

Using SharePoint calendars with Outlook

Outlook 2013 offers great features for managing your schedule. Its ability to display and even overlay multiple calendars is very handy for viewing schedules for multiple people or projects. If you use SharePoint to maintain shared calendars for time off, projects, team deliverables, and so on, you can open those calendars right in Outlook and work with them as if they were your own calendars. Updates that you make in Outlook are synchronized to SharePoint, and vice versa. The first step is to connect the SharePoint calendar to Outlook.

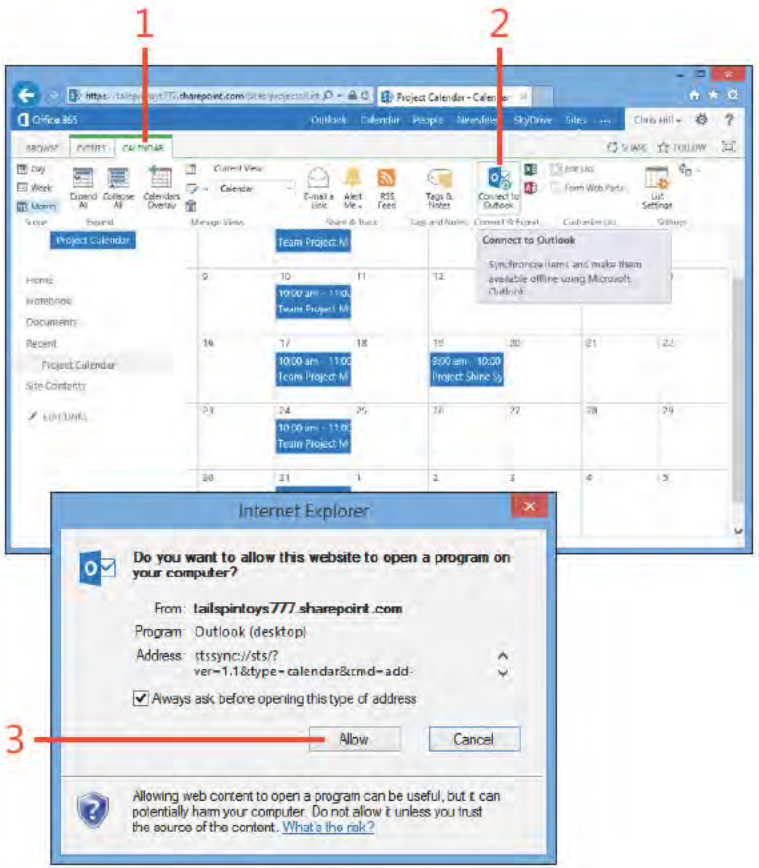
Connect a SharePoint calendar to Outlook

1 Open the ca endar n SharePo nt On the r bbon, c ck the Ca endar tab

2 In the Connect And Export group, c ck Connect To Out ook

3 In the Internet Exp orer d a og box, c ck A ow

(continued on next page)



TIP The process for connecting a SharePoint calendar to Outlook is very similar for SharePoint 2007, 2010, and 2013. Look on the Actions menu on the calendar for the Connect To Outlook command.

www.it-ebooks.info

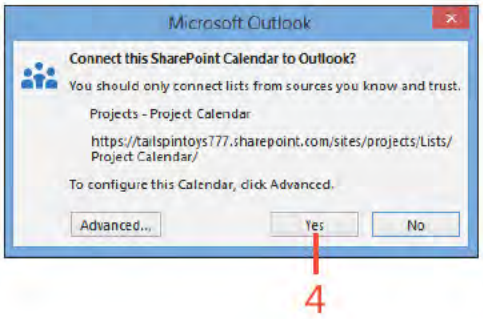
Connect a SharePoint calendar to Outlook *(continued)*

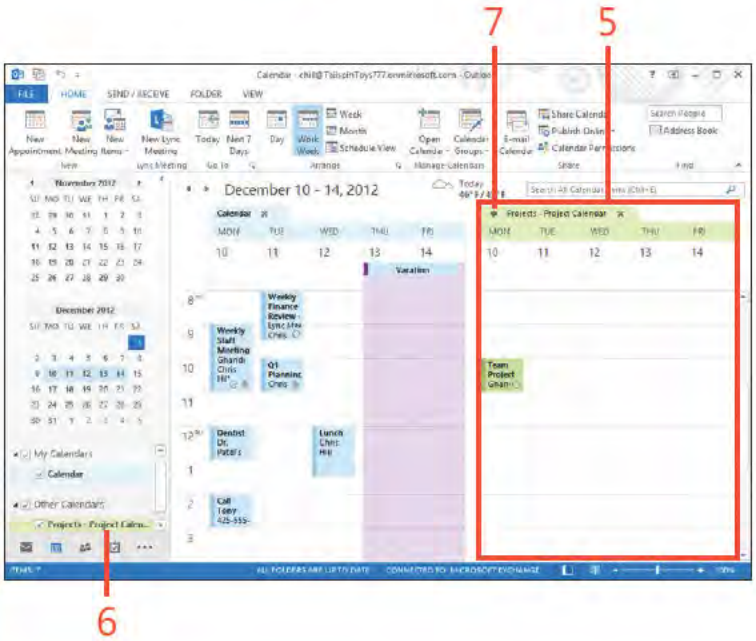
4 In the M crosoft Out ook d a og box, c ck Yes Enter your creden- t a s for the SharePo nt s te, f you're prompted

5 The SharePo nt ca endar appears n Out ook

6 The ca endar appears n the Fo der pane

7 C ck the arrow con to over ay the SharePo nt ca endar on your own ca endar





TRY THIS! To view details of an item in a SharePoint calendar, just click the item in SharePoint to open a form that shows those details.

TIP Use Alerts to have SharePoint notify you when a calendar changes.

www.it-ebooks.info

Create and edit SharePoint calendar items from Outlook

1 At the bottom of the Fo der pane, c ck the Ca endar con to open the Ca endar fo der

2 Choose the SharePo nt ca endar that you want to v ew

3 Opt ona y, c ear the check box for your defau t ca endar to remove t from the v ew

4 Se ect a t me range n the ca endar

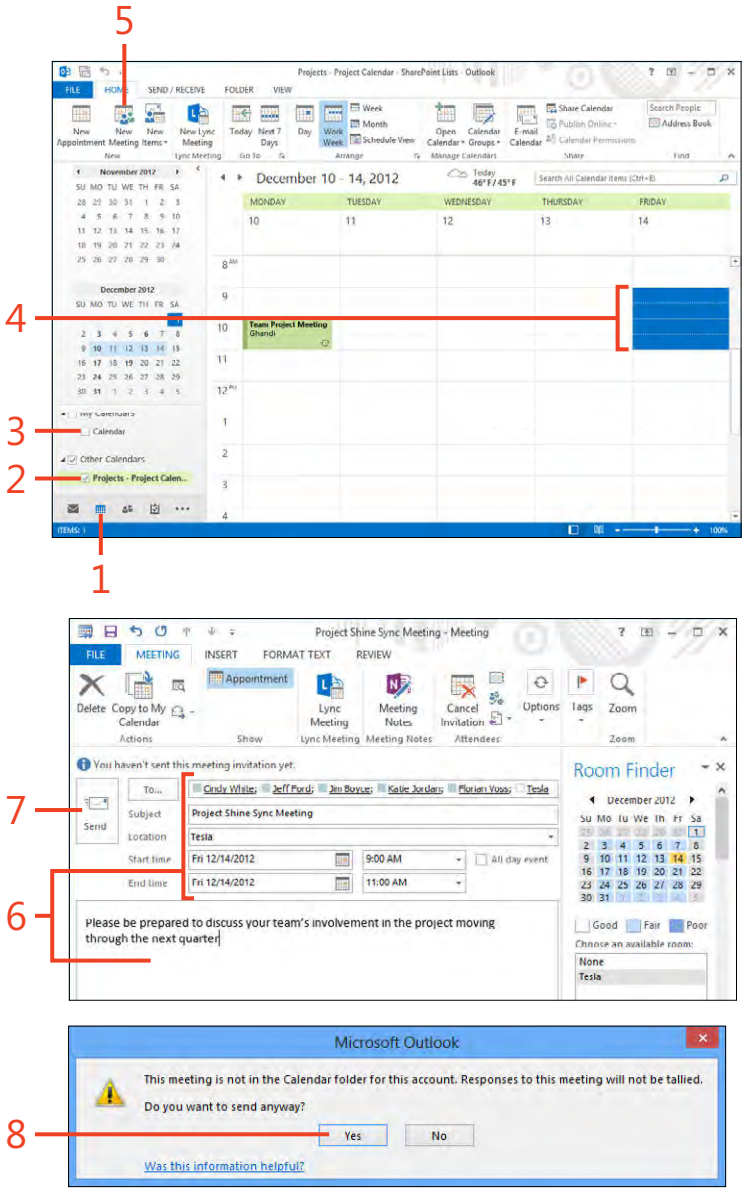
5 On the Home tab, n the New group, c ck New Meet ng

6 Add attendees and other deta s as needed

7 C ck Send

8 In the pop-up message box that appears, c ck Yes

(continued on next page)

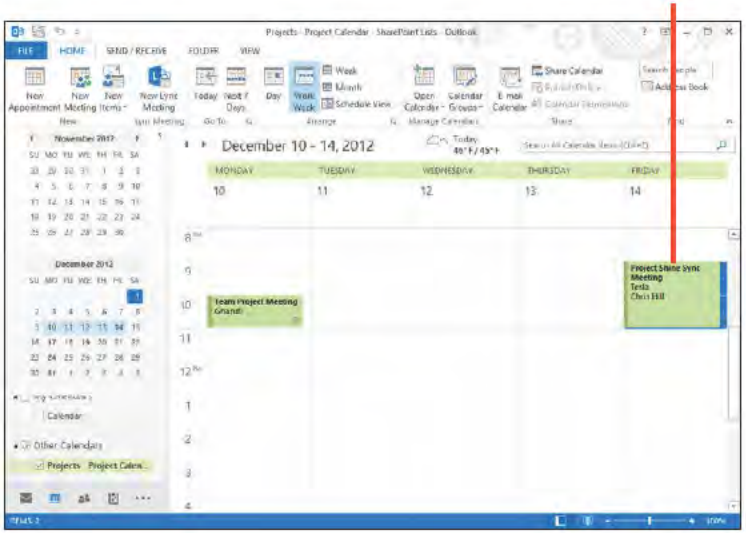


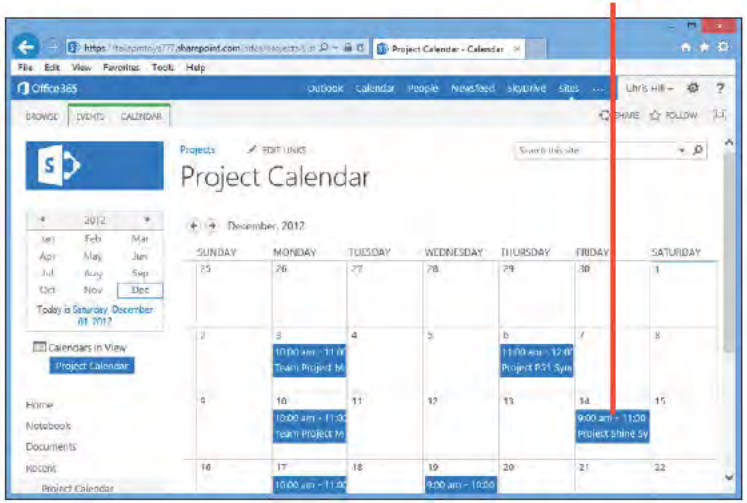
www.it-ebooks.info

Create and edit SharePoint calendar items from Outlook *(continued)*

9 The new item appears in Outlook.

10 The new item also appears in SharePoint.





TIP You can create meetings in a SharePoint calendar, but you won't receive a tally of responses from requested participants. To receive tallies, you must create the meeting in your local Outlook Calendar folder.

TRY THIS! Use a different color in Outlook for each calendar that you overlay so that you can easily see which items are on each calendar.

www.it-ebooks.info

Using SharePoint contacts in Outlook

If you use Exchange Server, your Global Address List (GAL) lists the people who have mailboxes in your organization and can also include other contacts added by the Exchange Server administrators. If you need to share other types of contacts—such as vendors or customers—with a team or even across your entire organization, you can turn to SharePoint as the place to share those contacts. Everyone can then connect that SharePoint contacts list in Outlook 2013 to work with the contacts, adding and updating them according to their SharePoint permissions for the shared list.

Connect a SharePoint contact list to Outlook

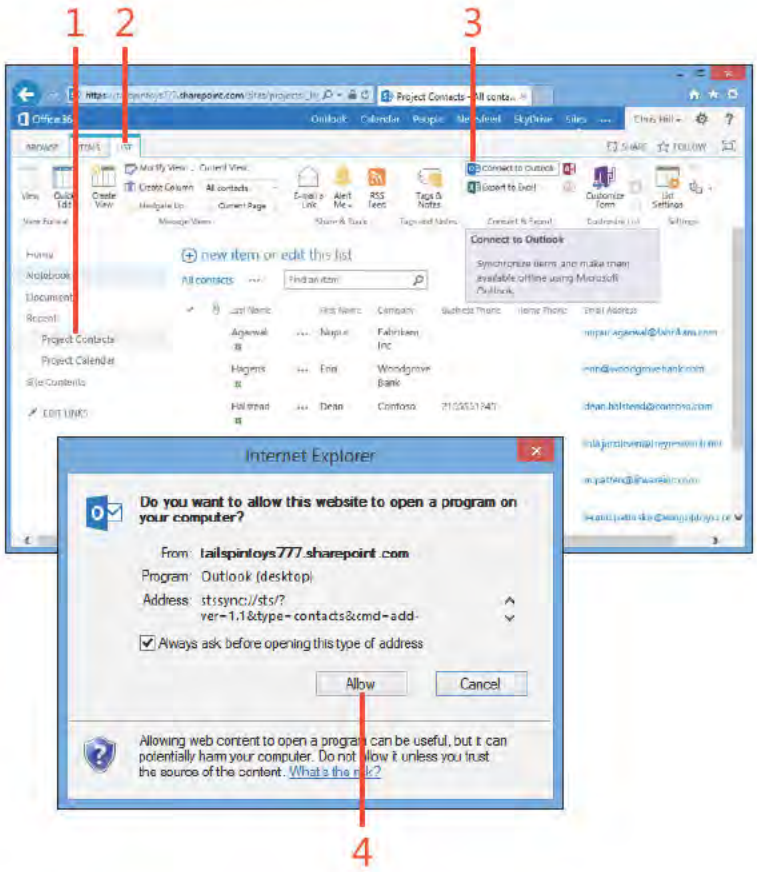
1 Open the SharePo nt s te n your web browser and nav gate to the shared contacts st

2 On the r bbon, c ck the L st tab

3 In the Connect & Export group, c ck Connect To Out ook

4 In the Internet Exp orer d a og box, c ck A ow

(continued on next page)



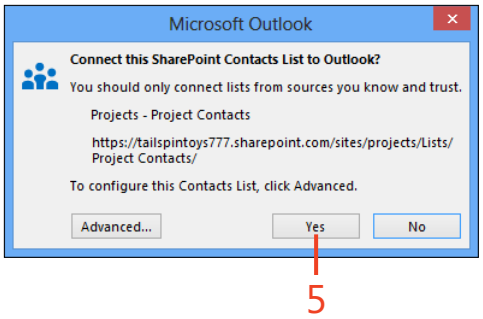
www.it-ebooks.info

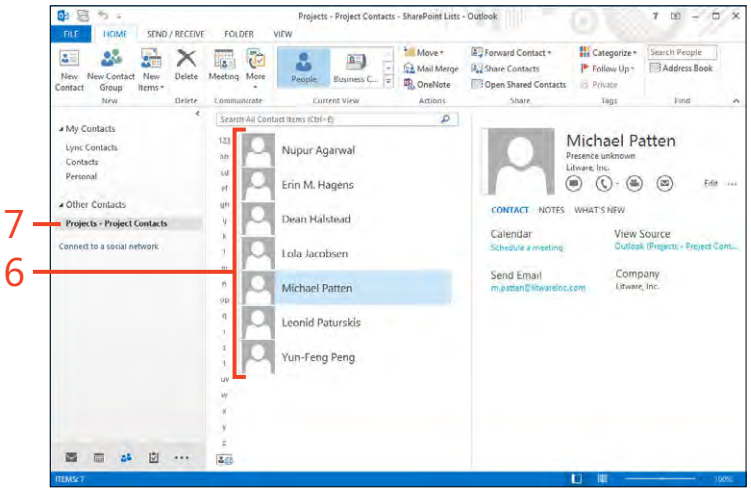
Connect a SharePoint contact list to Outlook *(continued)*

5 In the M crosoft Out ook d a og box, c ck Yes

6 The shared contacts appear n Out ook

7 The SharePo nt st shows up n the Fo der pane





www.it-ebooks.info

Create contacts in a SharePoint list from Outlook

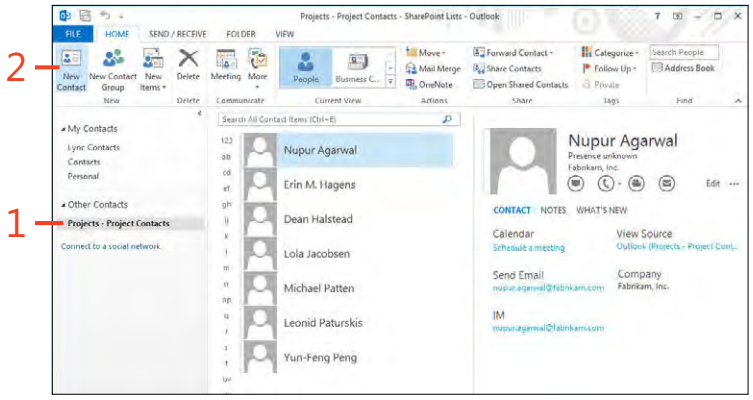
1 In the fo der pane, c ck the SharePo nt contact st Choose a d ffer-ent v ew, f you want

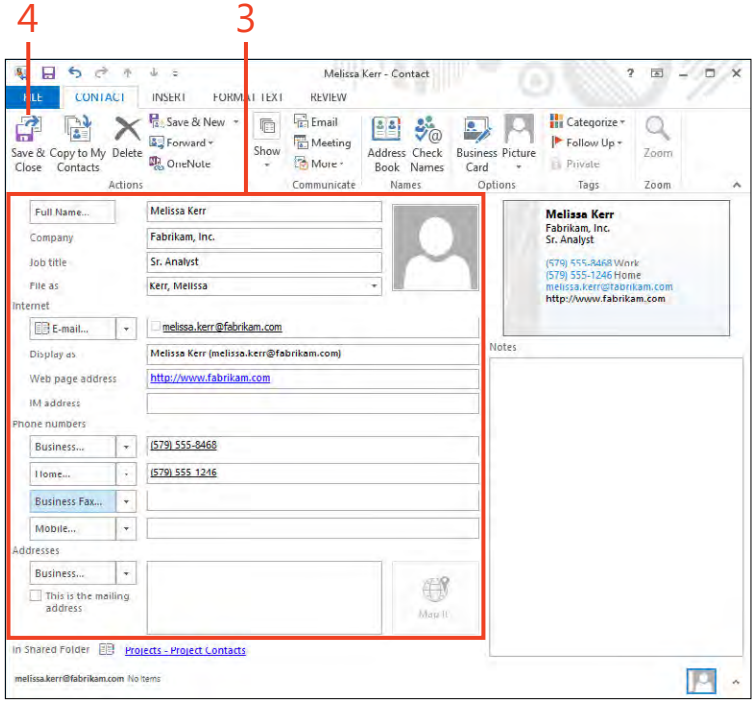
2 On the Home tab, n the New group, c ck New Contact

3 Enter the name and other deta s for the new contact

4 C ck Save & C ose

(continued on next page)



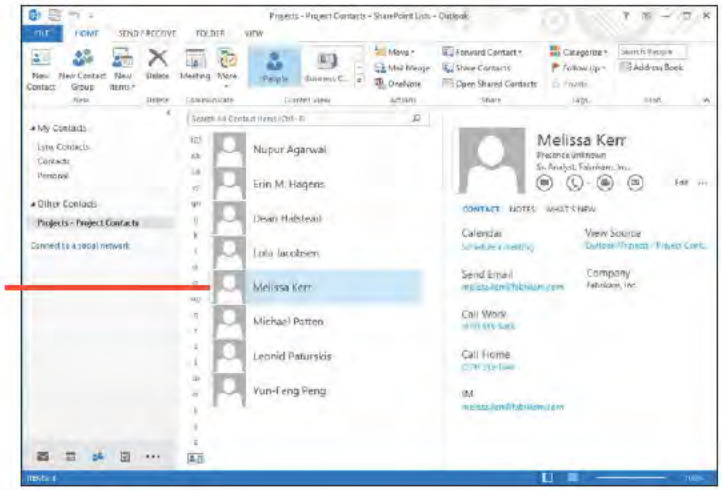


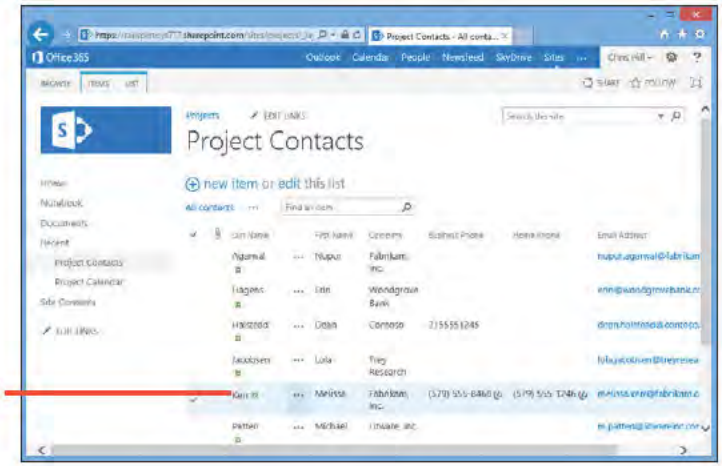
www.it-ebooks.info

Create contacts in a SharePoint list from Outlook *(continued)*

5 The new contact appears in the list in Outlook.

6 The new contact also appears in the SharePoint list.





TIP It's relatively easy to copy your Outlook contacts to a SharePoint list to share them with others. Just create the shared contacts list in SharePoint and then connect it to Outlook. Then, simply copy the contacts from your Contacts folder to the SharePoint folder in Outlook.

www.it-ebooks.info

Using SharePoint document libraries in Outlook

SharePoint calendars and contacts are particular types of lists in SharePoint. You can connect other types of lists to Outlook 2013, as well. For example, you can connect a document library. When you do so, Outlook creates a cached local copy of the documents on your computer.

Connect a document library to Outlook

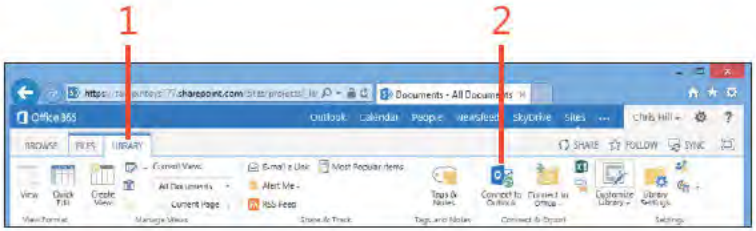
1 Open the SharePo nt document brary On the r bbon, c ck the L brary tab

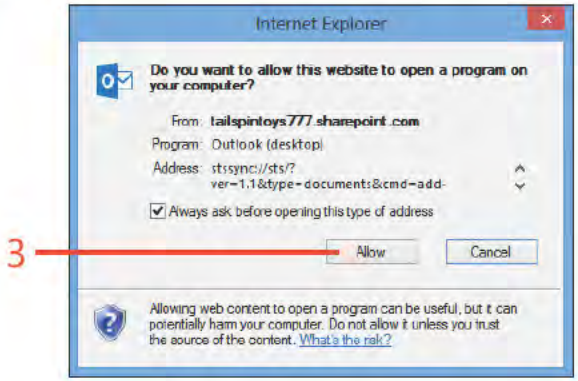
2 In the Connect & Export group, c ck Connect To Out ook

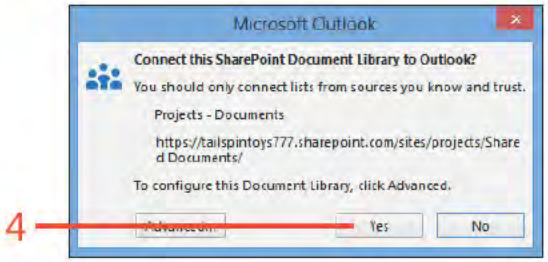
3 In the Internet Exp orer d a og box, c ck A ow

4 In the M crosoft Out ook d a og box, c ck Yes

(continued on next page)







TIP Connecting a SharePoint document library to Outlook creates a synchronized version of all of the documents in the library. If the library contains a large number of documents or if the documents themselves are large, it could take some time to download them to Outlook. It can also consume a large amount of local disk storage.

www.it-ebooks.info

Connect a document library to Outlook *(continued)*

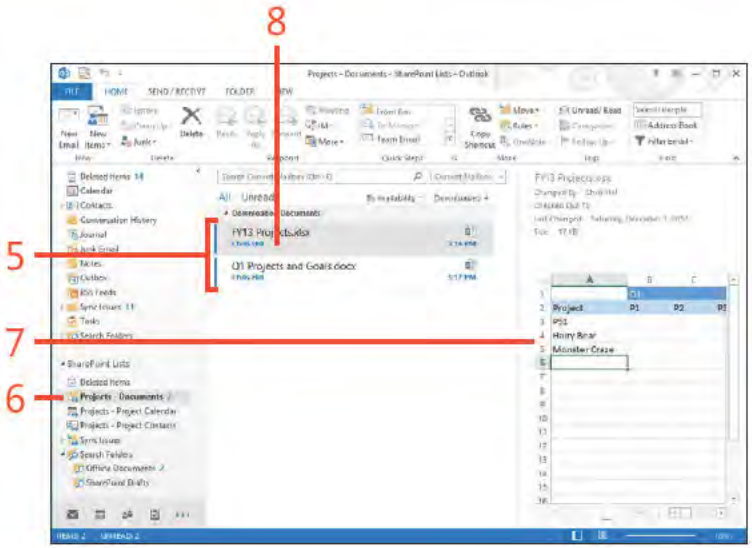
5 The documents appear n Out ook

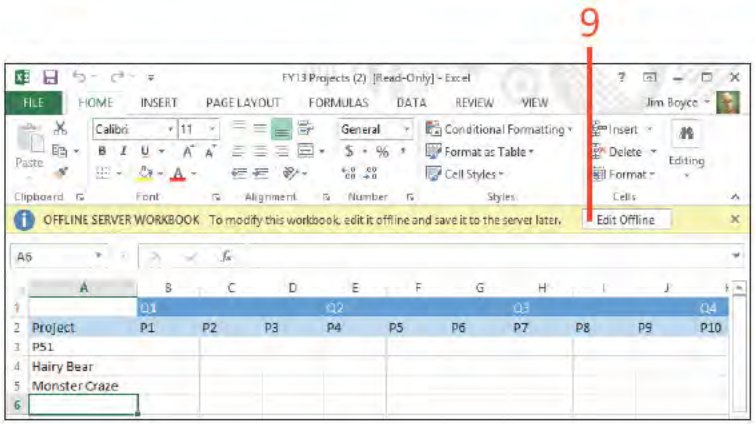
6 The Documents brary appears n the Fo der pane

7 Prev ew the document n the Read ng pane

8 Doub e-c ck a document to open t

9 C ck Ed t Off ne to ed t the off ne copy of the document After you save your changes, Out ook synchron zes the updated copy to SharePo nt





TIP Consider SharePoint Workspace as an alternative to working with document libraries offline in Outlook. SharePoint Workspace makes it possible for you to work with SharePoint content offline without connecting the content in Outlook, and it gives you greater control over what is synchronized and when.

www.it-ebooks.info

www.it-ebooks.info

Using Lync with Outlook

11

Microsoft Lync is a unified communications platform that provides capabilities for instant messaging, audio and video conferencing, and voice calling. In environments in which Lync is deployed, Microsoft Outlook 2013 can integrate with the Lync client to simplify communication. This section helps you to understand and use the core features of Lync within Outlook.

In this section:

- Creating and joining Lync meetings
- Setting Lync meeting options
- Starting an instant message conversation
- Starting voice and video calls

www.it-ebooks.info

Creating and joining Lync meetings

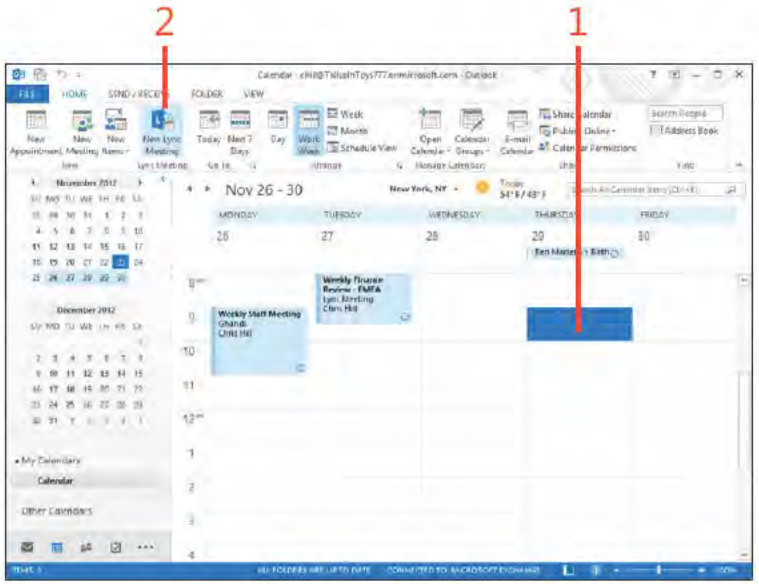
If you have Lync deployed in your environment (or you are using Microsoft Office 365), you can use Lync to hold online meetings with others. In the meeting, you can use audio, video, and desktop sharing to communicate and collaborate. The first step in using Lync for online meetings is to create an online meeting in Outlook 2013.

Create an online meeting

1 Open the Ca endar and choose a t me for the meet ng

2 On the Home tab, n the Lync Meet ng group, c ck New Lync Meet ng

(continued on next page)



TIP You can change a non-Lync meeting to a Lync meeting easily. Just open the meeting, and click Lync Meeting on the ribbon.

www.it-ebooks.info

Create an online meeting *(continued)*

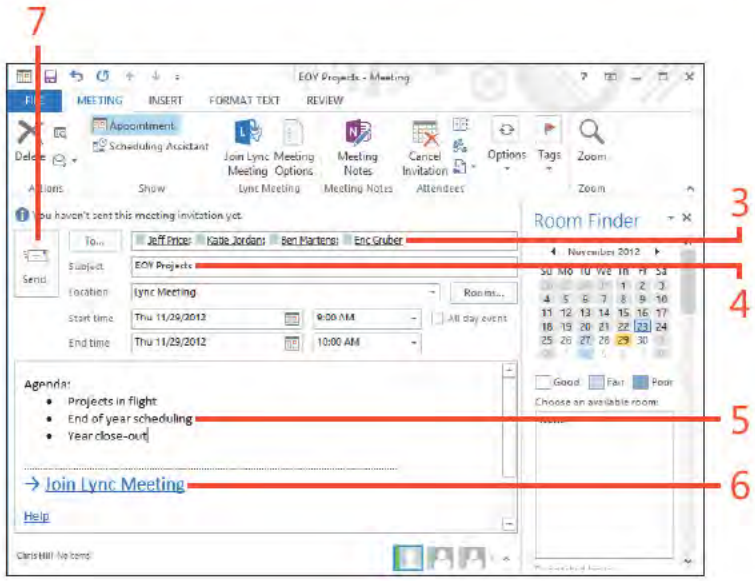
3 Add meet ng attendees

4 Add a meet ng subject

5 Add notes or attachments

6 Note the Lync Meet ng nk n the nv tat on

7 C ck Send



SEE ALSO There are several options you can configure for an online meeting. For details, see "Setting Lync meeting options" on page 203.

www.it-ebooks.info

Join a Lync meeting

1 In the Ca endar, c ck to se ect the Lync meet ng

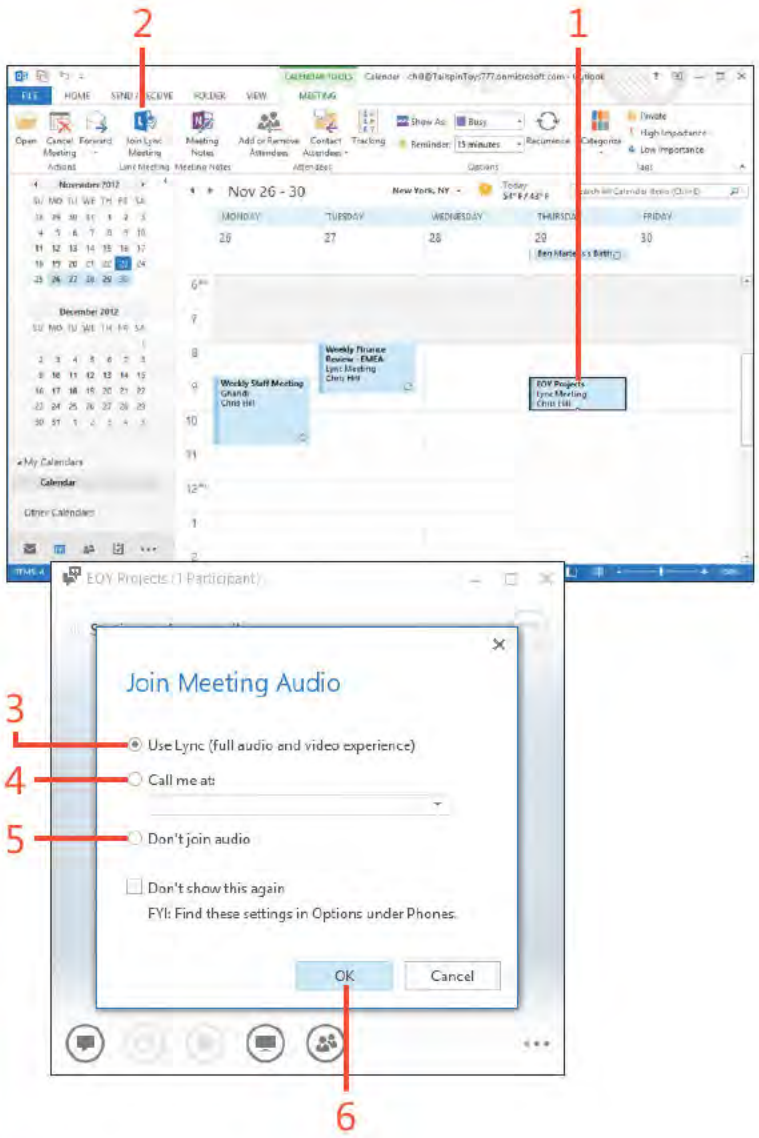
2 On the Home tab, n the Lync Meet ng group, c ck Jo n Lync Meet ng

3 In the Jo n Meet ng Aud o d a og box, c ck the Use Lync opt on to use Lync's aud o

4 A ternat ve y, c ck the Ca Me At opt on to have Lync ca you back at a spec f ed phone number

5 A ternat ve y, c ck the Don't Jo n Aud o opt on f you don't want to use Lync for aud o (for examp e, you're d a ed n v a phone)

6 C ck OK



TIP Use the Call Me At option and specify a call-back number to have Lync call you. For example, if you're having problems with your computer's audio, you can have Lync call your office phone or cell phone.

TRY THIS! Hover your mouse pointer over the phone icon in the Lync client to display a dial pad for dialing a conference ID number.

www.it-ebooks.info

Setting Lync meeting options

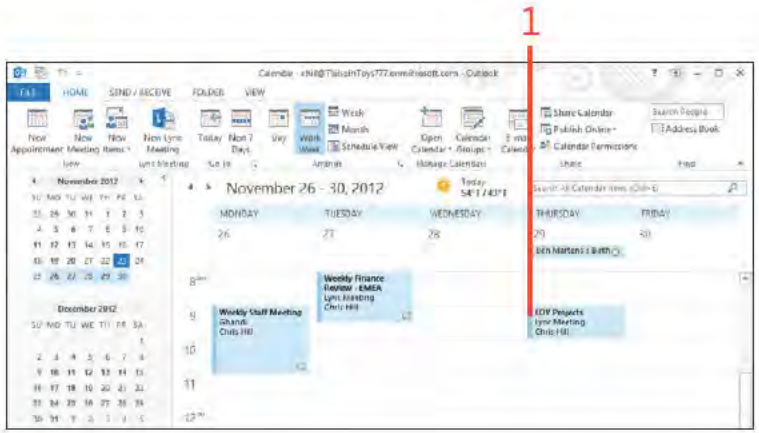
You can set several options for a Lync meeting to specify who can join the meeting automatically and who needs to wait in the virtual lobby and be admitted. You can specify which participants can act as presenters for the meeting (for example, sharing their applications for others to see). You can even set up the meeting so that only the organizer can speak, muting all other participants. You can set these options when you create the meeting, or you can edit the options for an existing meeting.

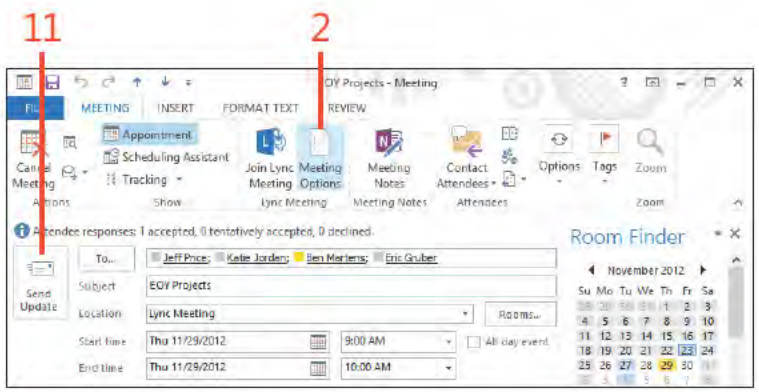
Set Online meeting options

1 Create a new Lync meet ng or open an ex st ng one

2 On the Meet ng tab, n the Lync Meet ng group, c ck Meet ng Opt ons

(continued on next page)





TIP The Don't Join Audio option is useful when you are using a conference phone or other audio device to call into the meeting and don't want to use your computer's audio for the call.

www.it-ebooks.info

Set Online meeting options *(continued)*

3 In the Lync Meet ng Opt ons d a og box, spec fy wh ch attendees can enter the meet ng w thout wa t ng n the obby

4 Choose an opt on to spec fy wh ch attendees can be a presenter

5 C ck Choose Presenters to ass gn spec f c peop e as presenters

6 In the Meet ng Opt ons Presenter d a og box, se ect a person from the Attendees st, and then c ck Add to add that person as a presenter

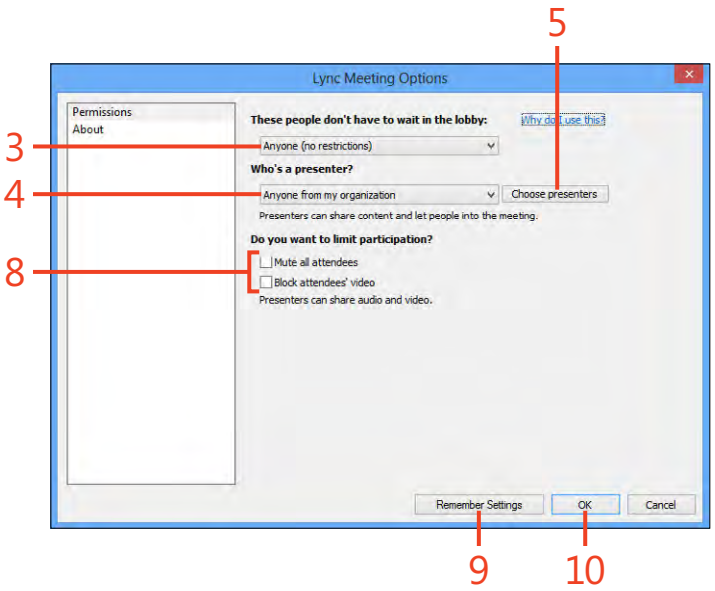
7 C ck OK

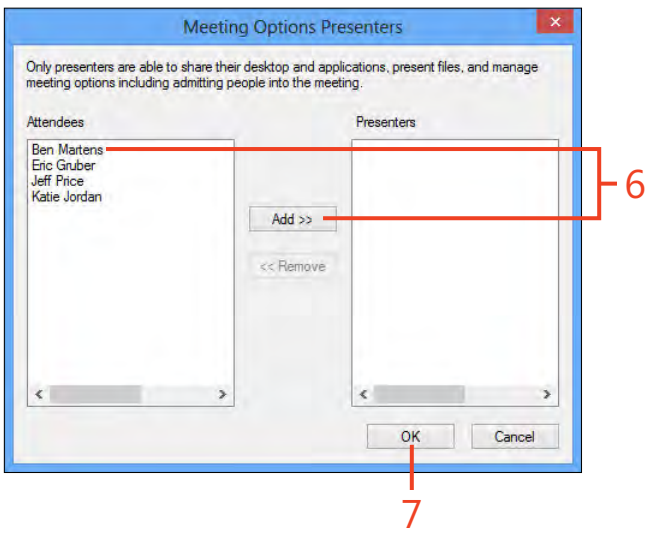
8 Se ect whether to mute a attendees and whether to b ock attendees' v deo

9 C ck Remember Sett ngs to save the sett ngs for your other Lync meet ngs

10 C ck OK

11 Make other changes as needed, and then c ck Send Update (refer back to the screenshot on the prev ous page)





www.it-ebooks.info

Starting an instant message conversation

You can easily use Lync to start an instant messaging (IM) conversation with others through Outlook 2013. To facilitate this feature, Outlook shows the online status of others (called presence), by which you to tell at a glance whether a person is online and available.

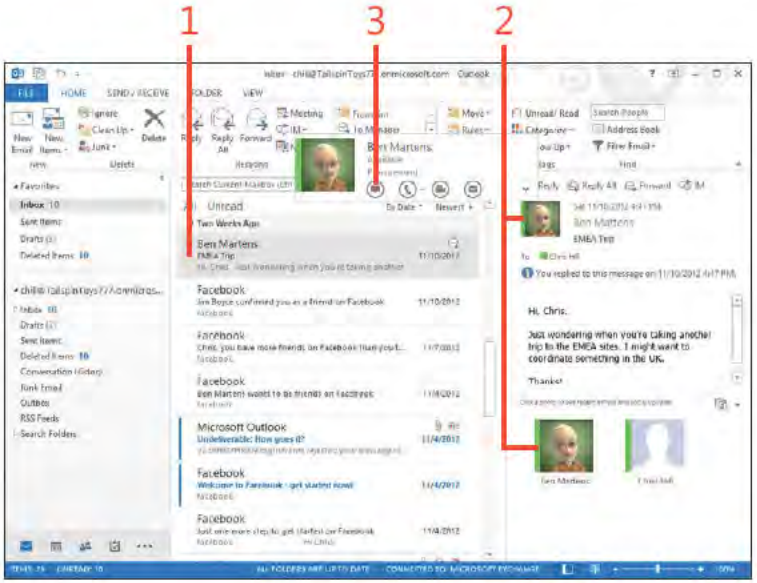
Start an IM conversation from an email

1 Open the Inbox and se ect a message w th the des red contact as a rec p ent or sender

2 In the Read ng pane or the Peop e pane, hover the mouse po nter over the person's name or p cture

3 On the menu that appears appears, c ck the Send An IM button

(continued on next page)



TRY THIS! Click the Font button (represented by a capital letter A) in the Lync IM window to change the font used for your IM conversation.

www.it-ebooks.info

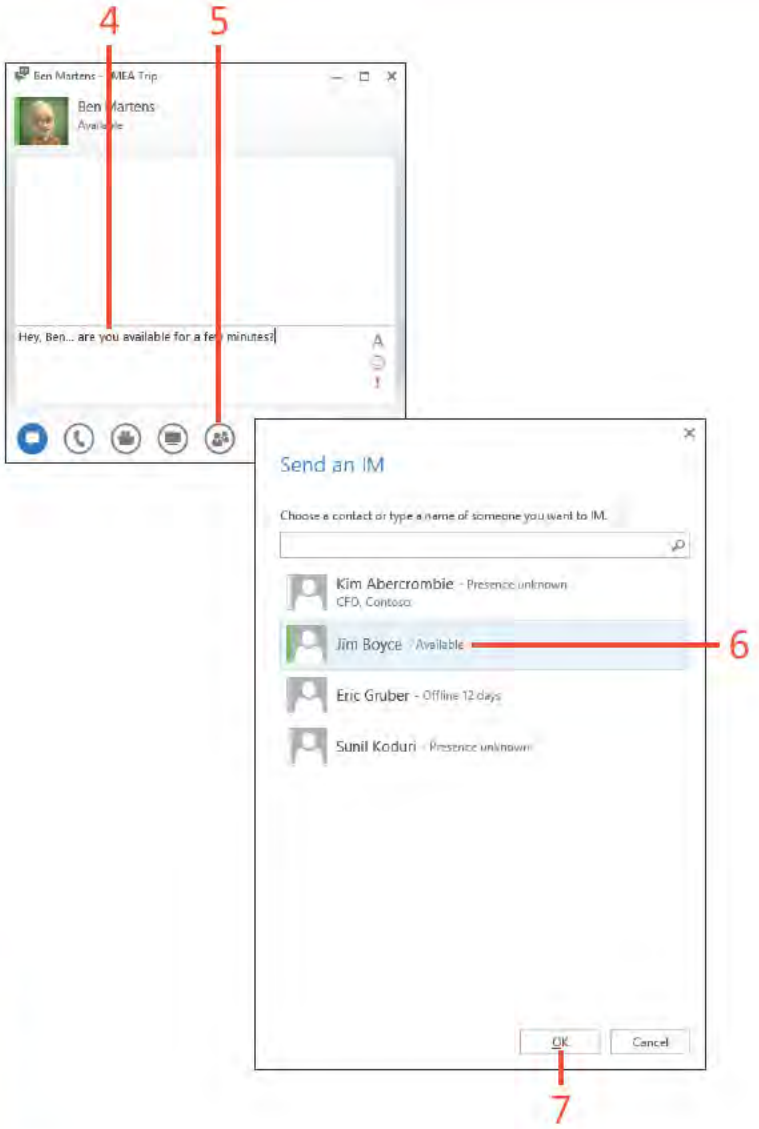
Start an IM conversation from an email *(continued)*

4 In the Lync c ent w ndow, type your message and press Enter

5 To nv te others to the same conversat on, at the bottom of the Lync c ent w ndow, c ck the Inv te More Peop e button

6 Choose an nd v dua (or nd v dua s)

7 C ck OK



TIP Click the Set High Importance button (represented by an exclamation mark) in the Lync IM window to mark your message as important. Lync will display an exclamation mark to the left of the message in the recipient's Lync IM window.

www.it-ebooks.info

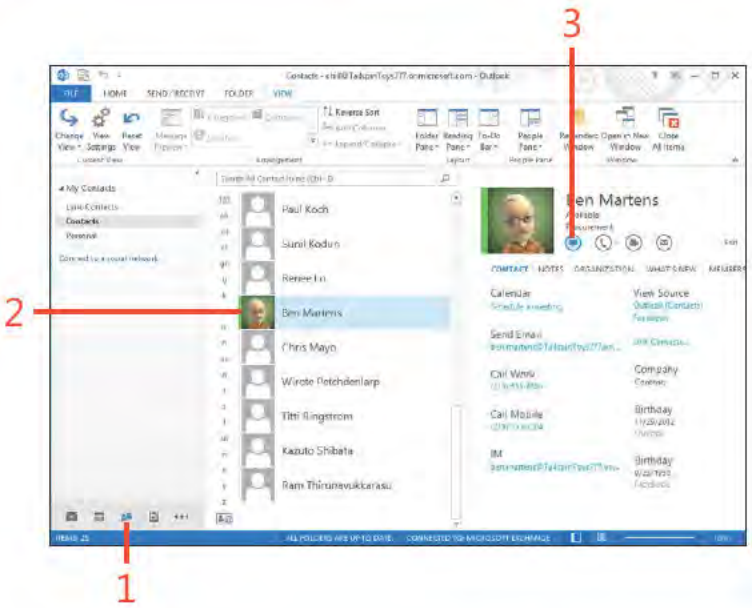
Start an IM conversation from the People Hub

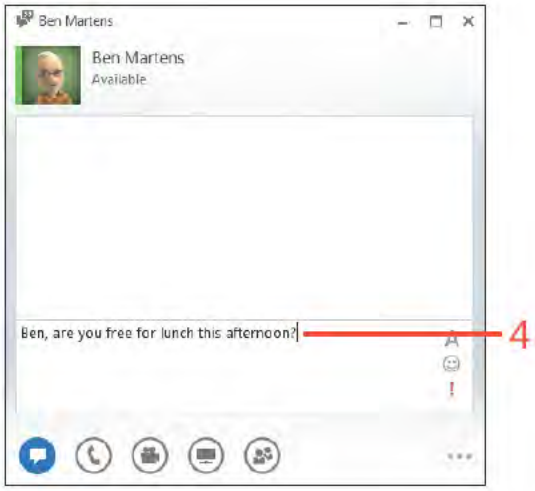
1 At the bottom of the Fo der pane, c ck the Peop e con to d sp ay the Peop e Hub

2 Locate a contact whose presence shows as on ne

3 In the Read ng pane, c ck the Send An IM button

4 After the Lync IM w ndow appears, type your message and press Enter





TIP The presence indicator isn't always an exact representation of another person's status. For example, the person might in fact be online and at her computer but has set her status as Away to reduce interruptions.

TRY THIS! You can quickly start a voice call from an IM window. Just click the Call button at the bottom of the IM window and choose which number to call.

www.it-ebooks.info

Starting voice and video calls

You can easily start a Lync voice call from Outlook 2013, in much the same way you start an instant message. Anywhere you see presence information for a person in Outlook, you can start a voice call simply by clicking the Call button in that individual's contact card. Similarly, if you have a webcam connected to your computer (or built in), you can use Lync to make and receive video calls. The other participant will see your video, and if they also have a camera and have it enabled for the call, you'll see their video. Although the examples in this section start voice and video calls from the People Hub, you can also start calls from any location in Outlook that shows presence, such as the Inbox.

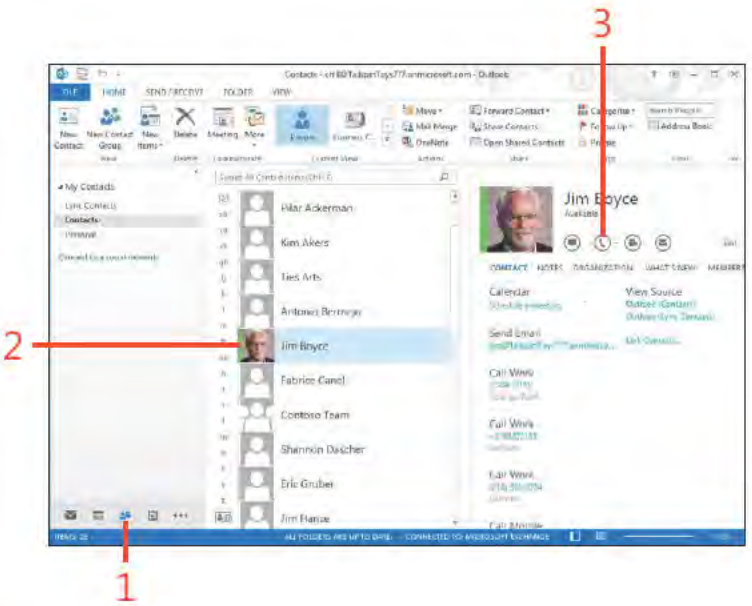
Start a voice call

1 At the bottom of the Fo der pane, c ck the Peop e con to d sp ay the Peop e Hub

2 Se ect the contact whom you want to ca

3 In the Read ng pane, c ck the Ca button

(continued on next page)



TIP You can merge together two calls. After you call and connect to the first person, call the second person. Lync will put the first call on hold. Then, in the lower-right corner of the Call window, click the ellipsis button. On the menu that appears, click Merge This Call Into and then choose the other call. Lync will join the calls into one.

www.it-ebooks.info

Start a voice call *(continued)*

4 Track the length of time the call is active

5 Click to mute

6 Click to disconnect the call

TRY THIS! Clicking the microphone button in the Call window mutes and unmutes your microphone. Hover the mouse pointer over the microphone button to display a dial pad that you can use to enter numbers in the call. For example, you might use the dial pad to dial a conference number after you have connected to the conference call main number.

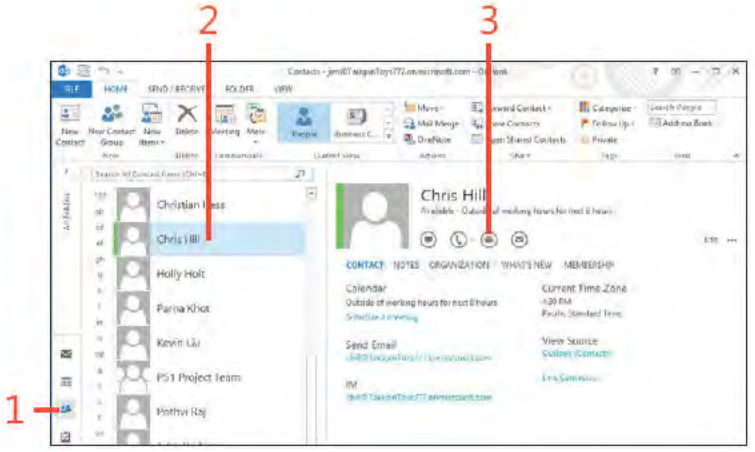
Start a video call

1 In the Folder pane (shown collapsed), click the People icon to display the People Hub

2 Select the contact whom you want to call

3 In the Reading pane, click the Start Video Call button

(continued on next page)



www.it-ebooks.info

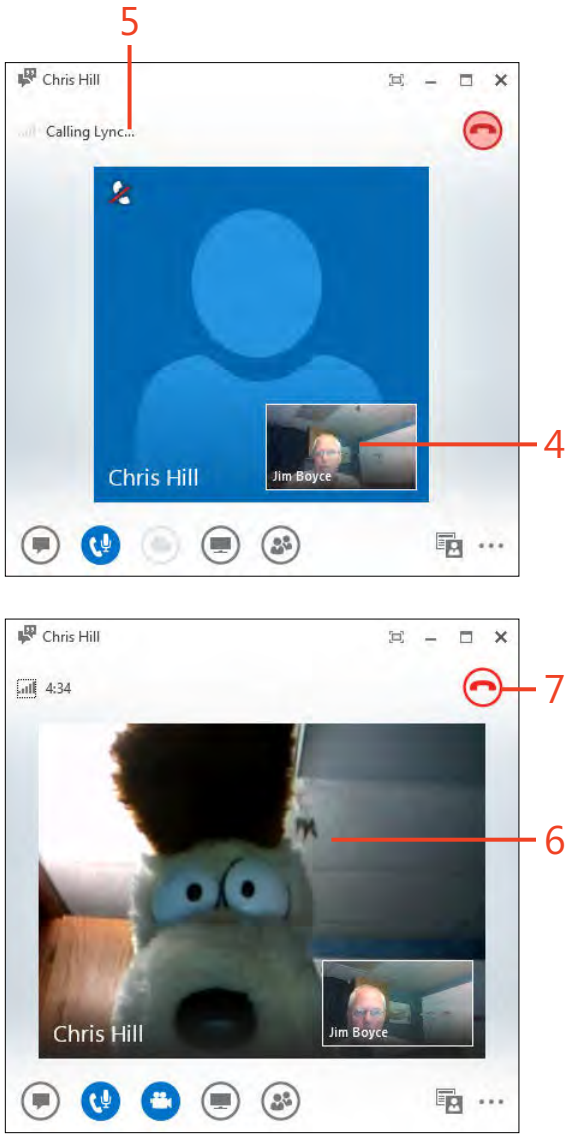
Start a video call *(continued)*

4 Lync shows your v deo prev ew

5 Lync shows ca status

6 After the other person accepts the v deo ca , you see h s v deo

7 C ck to d sconnect the ca when f n shed



www.it-ebooks.info

Managing items and folders

12

Microsoft Outlook 2013 gives you several ways to manage your Outlook items and folders, including organizing items in categories, creating and using folders to store items, and using the Mailbox Cleanup tool.

Outlook's abilities to help you manage message threads (conversations) have improved, as well. You can group messages into conversations so that you can view all messages in the thread, regardless of the folder in which they're stored. You can also use some new cleanup features to eliminate duplicate messages from a conversation.

Quick Steps are another new feature in Outlook 2013. Quick Steps are a little like rules except that they don't have conditions. Instead, they're actions that you define and that you can apply to messages selectively. For example, you might create Quick Steps to move messages to specific folders.

This section covers how to manage your items and folders in Outlook 2013. It covers how to categorize items, organize folders, delete items, and clean up folders.

In this section:

- Using categories
- Adding your own categories
- Renaming and deleting categories
- Creating search folders
- Organizing with folders
- Cleaning up folders
- Deleting items

www.it-ebooks.info

Using categories

Categories use color indicators with associated keywords or phrases that help you to manage Outlook 2013 items, such as contacts, email messages, journal entries, and meetings. With categories, you can set up relationships between items stored in different places in Outlook. For example, you can categorize a piece of email and a meeting reminder as business items. Then, when you sort, filter, or search for all your business-related items, that email message and meeting reminder appear.

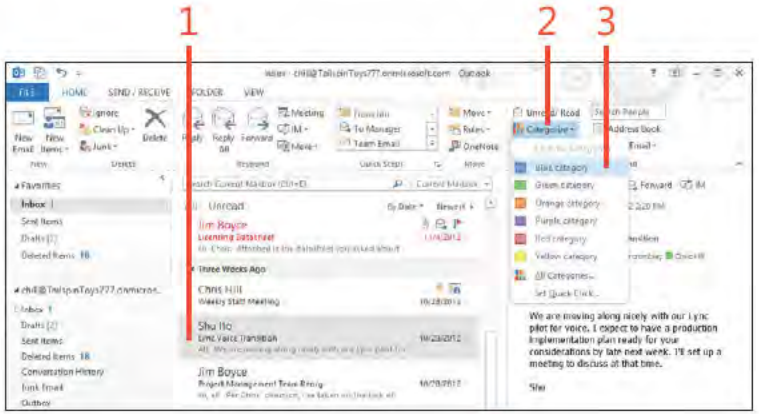
Categorize an item

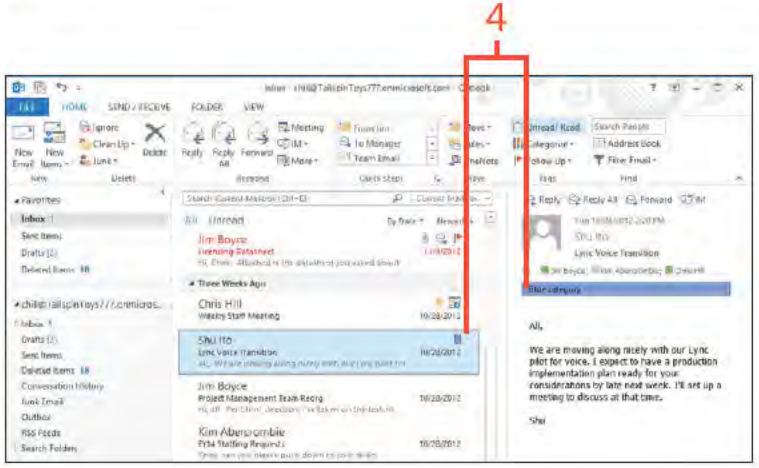
1 Se ect an tem

2 On the Home tab, n the Tags group, c ck Categor ze

3 In the st that appears, choose a category to ass gn to the tem

4 A co or category nd cator appears n the Categor es co umn and n the header





TIP You can associate an item with as many categories as you like. The more categories with which you associate an item, the easier it is to find that item when you conduct searches. The first time you have used the category, Outlook asks if you want to change the color. For now, just click No. You learn about changing category properties later in this section.

www.it-ebooks.info

Assign multiple categories

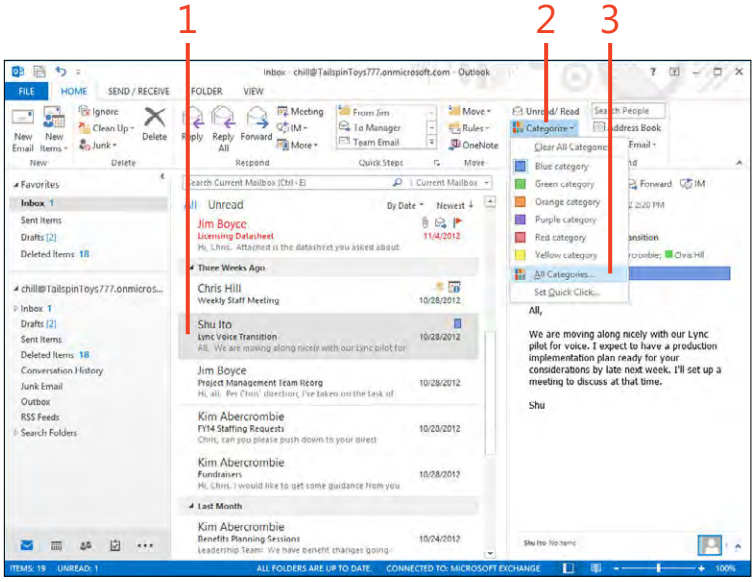
1 Se ect an tem

2 On the Home tab, n the Tags group, c ck Categor ze

3 In the st that appears, choose A Categor es

4 In the Co or Categor es d a og box, se ect each category that you want to ass gn to that tem

5 C ck OK



www.it-ebooks.info

Adding your own categories

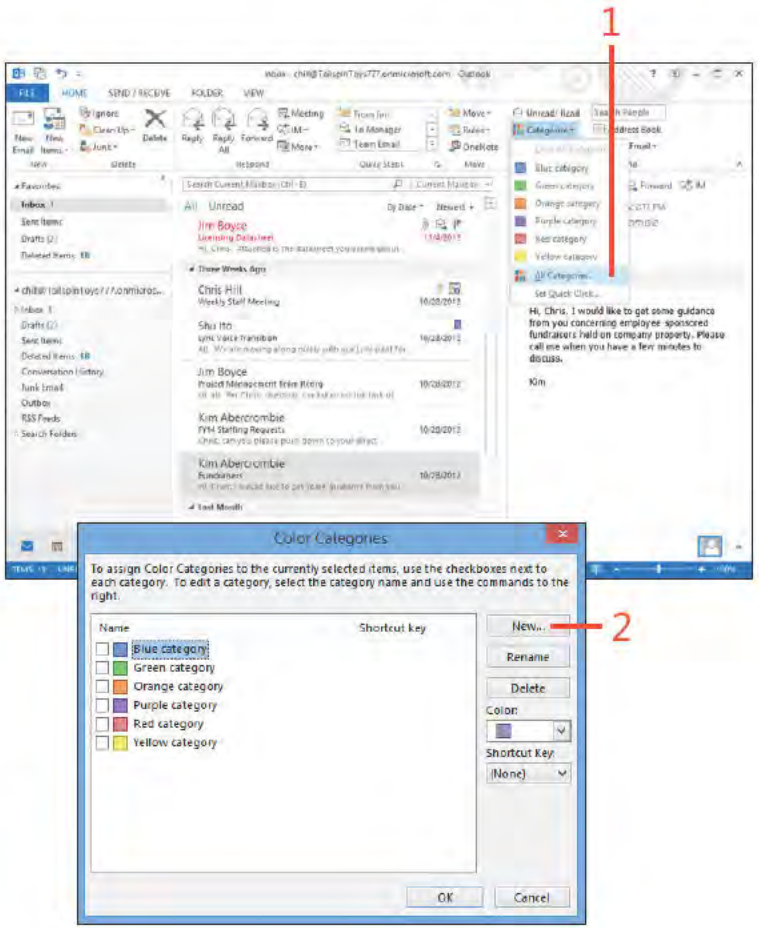
Outlook 2013 includes a small selection of predefined categories. You can easily add other categories as needed to help you organize your Outlook data in a way that makes sense to you. For example, you might create categories for projects, teams, and other specific items and groups that you work with regularly.

Add categories to your category list

1 Se ect an tem On the Home tab, n the Tags group, c ck Categor ze and then, n the st that appears, c ck A Categor es

2 In the Co or Categor es d a og box, c ck New

(continued on next page)



TIP If you assign a category to an item and then delete the category from the Master Category List, the category isn't deleted from any items to which it is assigned. You can still sort, view, or filter items based on deleted categories.

www.it-ebooks.info

Add categories to your category list *(continued)*

3 In the Add New Category d a og box, n the Name text box, type a name for the new category

4 In the Co or st, se ect a co or

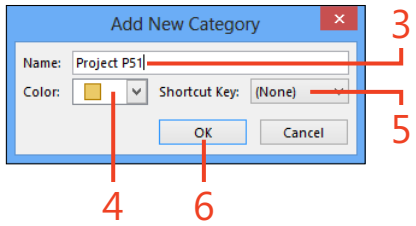
5 Opt ona y, n the Shortcut Key st, choose a shortcut key

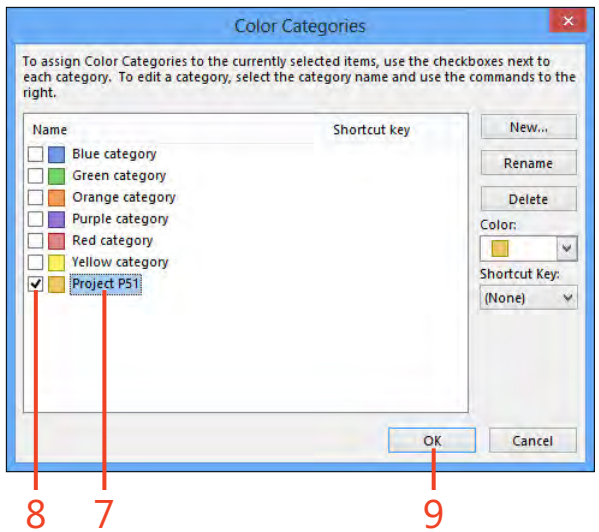
6 C ck OK

7 The new category appears n the Co or Categor es d a og box

8 C ear the check box f you want on y to create the category but not ass gn t yet

9 C ck OK





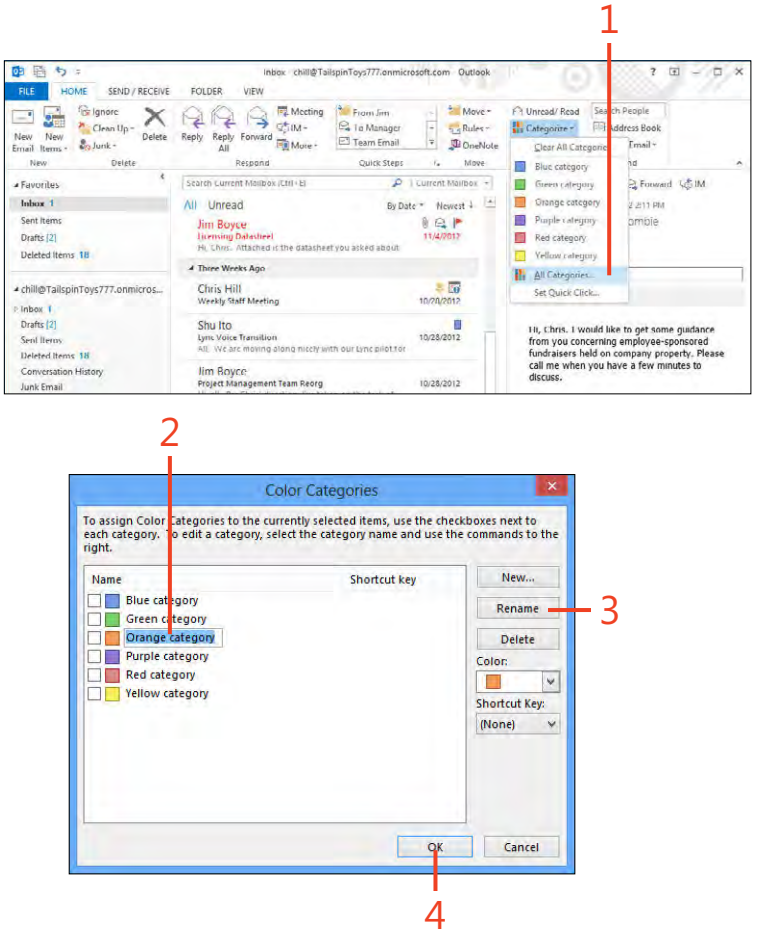
www.it-ebooks.info

Renaming and deleting categories

You can easily rename a category. Doing so causes all items to which that category is assigned to be updated with the new name. You can also delete categories. Deleting a category from the Master Category List in the Color Categories dialog box removes the category only from the list; it does not remove the category from any items to which it is assigned.

Rename a category

1. On the Home tab, in the Tags group, click Categorize and then, in the list that appears, click All Categories.
2. In the Color Categories dialog box, click the category that you want to rename.
3. Click Rename, type a new name, and then press Enter.
4. Click OK.



www.it-ebooks.info

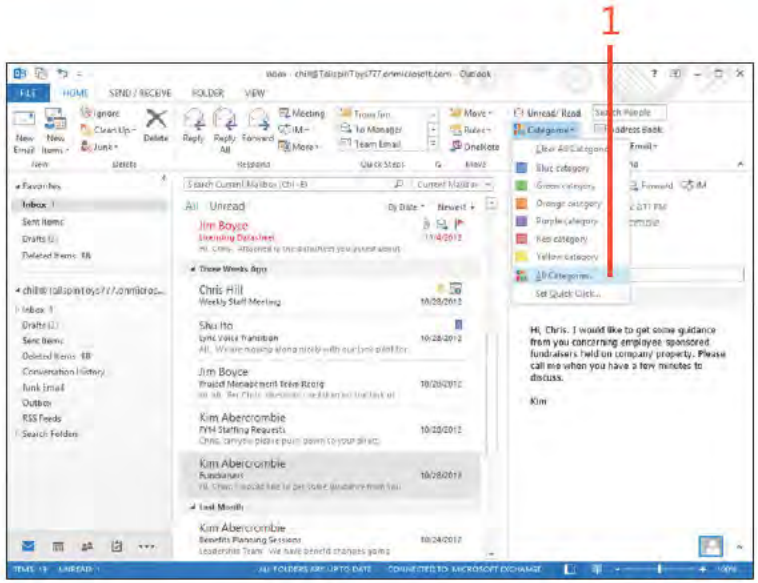
Delete a category

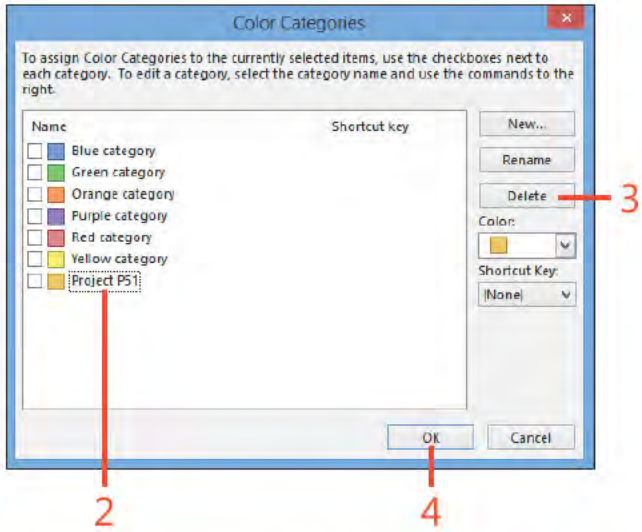
1 On the Home tab, n the Tags group, c ck Categor ze and then, n the st that appears, c ck A Categor es

2 In the Co or Categor es d a og box, c ck the category that you want to de ete

3 C ck De ete In the pop-up message box that asks you to conf rm the de et on the category, c ck Yes

4 C ck OK





TIP Deleting a category that's in use clears the color only from the category. To remove the category altogether, you must clear the category from all items to which it's assigned.

TRY THIS! If you want to clear a category from all items to which it's assigned, arrange the view by category. Locate the grouped category that you want to remove, select all of the items in the group, right-click an item in the group, click Categorize, and then click the category that you want to remove.

www.it-ebooks.info

Creating search folders

Using search folders, you can quickly locate messages anywhere they exist in your Outlook 2013 data store. Although a search folder looks and behaves like any other Outlook folder, the search folder is really a special way to display search results. When you create the search folder, you specify the search conditions. Outlook then displays the results of the search in a folderlike way. However, the items that appear in the search folder actually reside in other locations—the search folder is just a way to group those messages together in one viewing location.

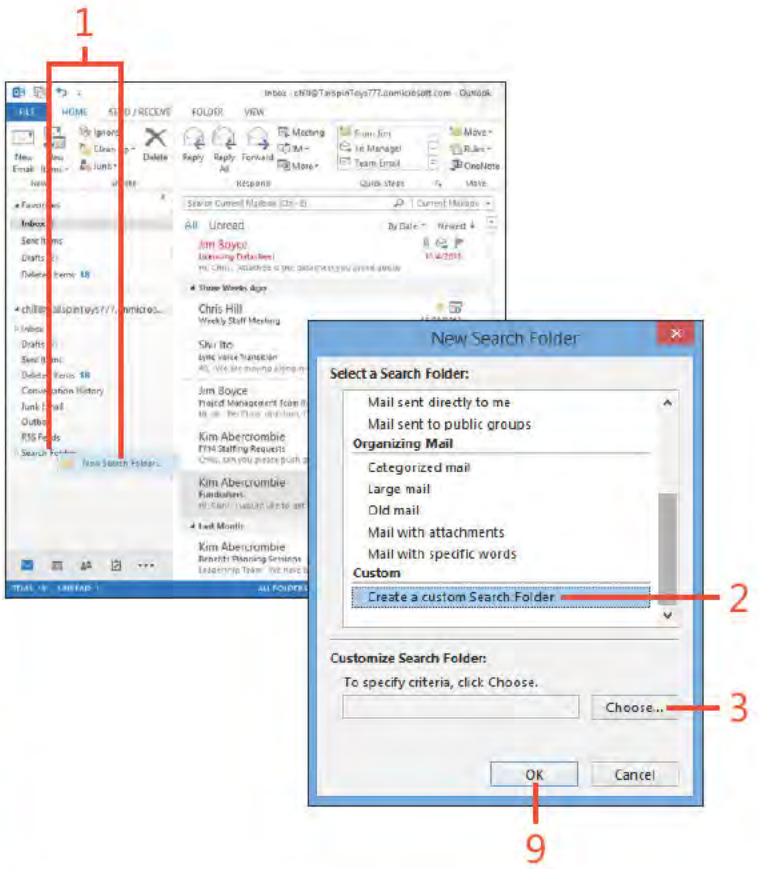
Create a custom search folder

1 Open the Inbox, r ght-c ck Search Fo ders, and then c ck New Search Fo der

2 In the New Search Fo der d a og box, scro to the bottom of the st and c ck Create A Custom Search Fo der

3 C ck Choose

(continued on next page)



TIP The options in the Search Folder Criteria dialog box give you a wide array of conditions to use in defining the search. For example, on the Messages tab, you can search for words or phrases, specify that the message is from a particular sender or sent to a particular recipient, and set a time frame in which the message was sent or received (as well as other time options).

TRY THIS! To modify a search folder, right-click the search folder in the Folder pane and then, on the shortcut menu that appears, click Customize This Search Folder.

www.it-ebooks.info

Create a custom search folder *(continued)*

4 In the Custom Search Fo der d a og box, n the Name text box, type a name for the search fo der

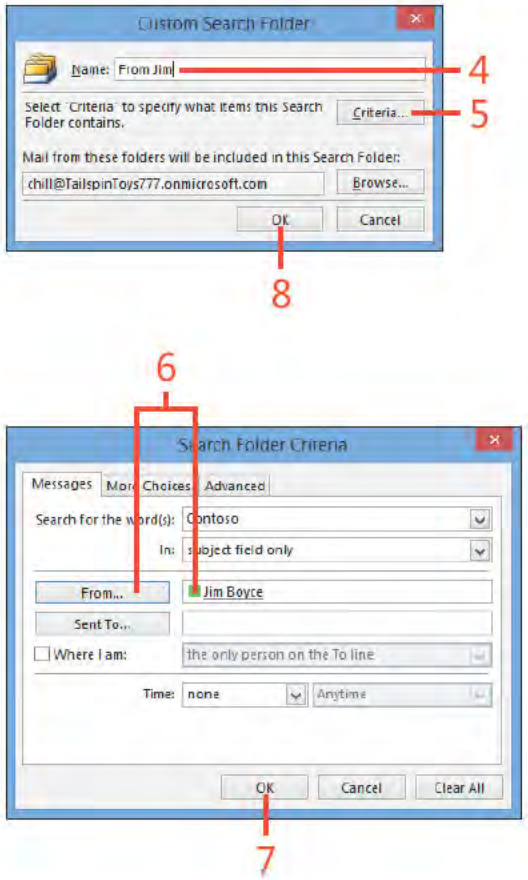
5 C ck Cr ter a

6 In the Search Fo der Cr ter a d a og box, c ck From and choose a contact or type an ema address n the text box

7 C ck OK to save the changes and d sm ss the Search Fo der Cr ter a d a og box

8 C ck OK to save the changes and d sm ss the Custom Search Fo der d a og box

9 C ck OK to save the changes and d sm ss the New Search Fo der d a og box (refer back to the screenshot on the prev ous page)



TIP The Unread Mail search folder shows all unread messages, including those in folders other than the Inbox. Likewise, the Categorized Mail search folder shows all messages that have a category assigned from all folders in your mailbox. The Categorized Mail search folder shows only messages with a category assignment (uncategorized messages are excluded).

www.it-ebooks.info

Organizing with folders

Outlook 2013 uses folders to let you store items, such as email messages and notes. Outlook folders are similar to the folders you can create and modify in Windows Explorer in that they help organize items. For example, the Inbox folder is the default location for your incoming email messages, whereas the Outbox folder stores your outgoing email messages until you send them.

You can use the existing folders created automatically by Outlook, but you can also create your own folders to help you organize your items in a way that makes the most sense for the way you use Outlook. You can move items simply by dragging them to a folder in the Folder pane.

Create a new folder

1 On the r bbon, c ck the Fo der tab

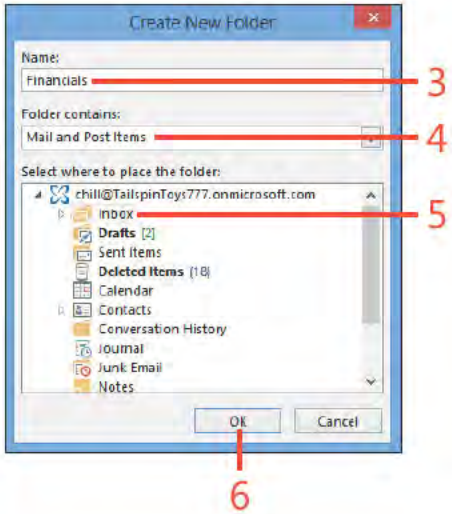
2 In the New group, c ck New Fo der

3 In the Create New Fo der d a og box, n the Name text box, type a name for the new fo der

4 In the Fo der Conta ns st, se ect the type of tem that the fo der s to conta n For examp e, f you want a fo der to store messages, se ect Ma And Post Items

5 Se ect the ocat on where you want the new fo der to be p aced

6 C ck OK



SEE ALSO For information about Outlook folders, see "Exploring Outlook folders" on page 23.

TRY THIS! You can move more than one item at a time. Select multiple items by holding down the Ctrl key while clicking the items that you want to move. Then, perform the move by using any of the methods described here. Also, if the destination folder is a subfolder that's not open in the folder list, drag the message and hold it on the parent folder until that parent folder opens to reveal the target folder.

www.it-ebooks.info

Move items

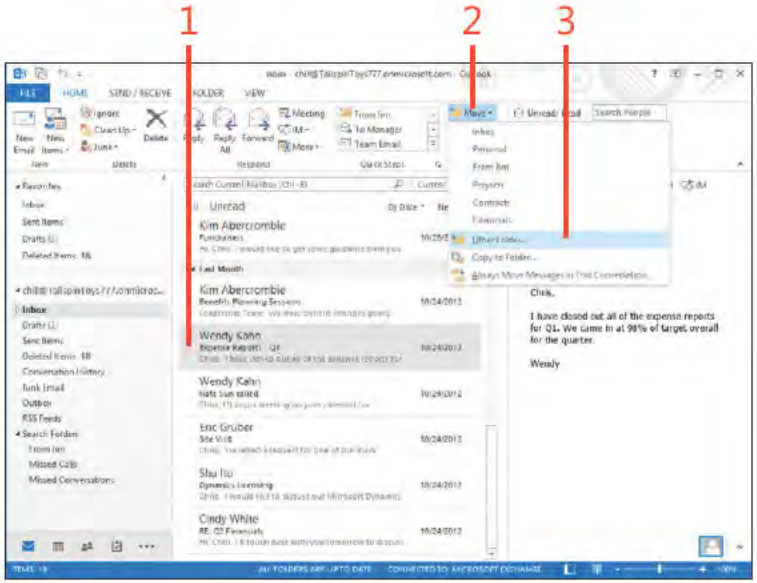
1 Se ect the message that you want to move

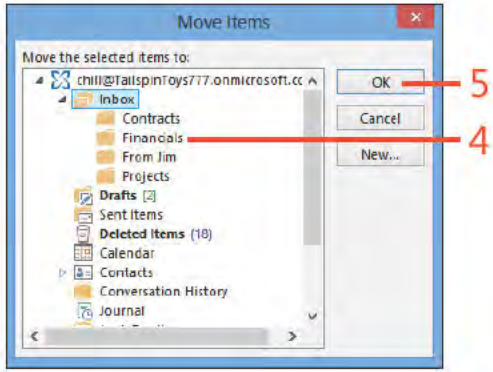
2 On the Home tab, n the Move group, c ck Move and then, n the st that appears, choose the fo der to wh ch you want to move the tem If the fo der sn't v s b e n the st, perform steps 3, 4, and 5 of th s exerc se

3 C ck Other Fo der

4 In the Move Items d a og box, c ck the target fo der

5 C ck OK





CAUTION Sometimes when you move an item, you might drag it into the wrong folder. If you do this, don't panic. Press Ctrl+Z immediately after you move the item. Outlook returns the item to its original location.

SEE ALSO To learn how to move messages to other folders automatically with rules, see "Working with the Rules Wizard" on page 81.

www.it-ebooks.info

Cleaning up folders

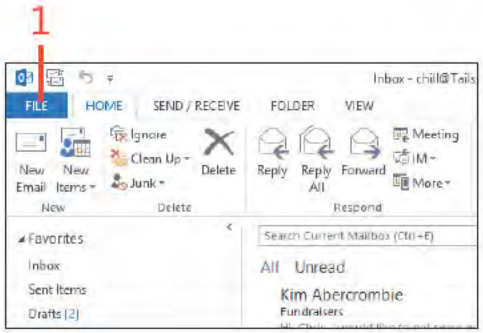
You should get in the habit of cleaning out unwanted email messages, old contacts, and other items by deleting them or moving them to other folders. Outlook 2013 provides the Mailbox Cleanup tool to help you manage your mailbox. This tool helps you reduce the size of your mailbox to increase Outlook's performance and to make managing mailbox items easier.

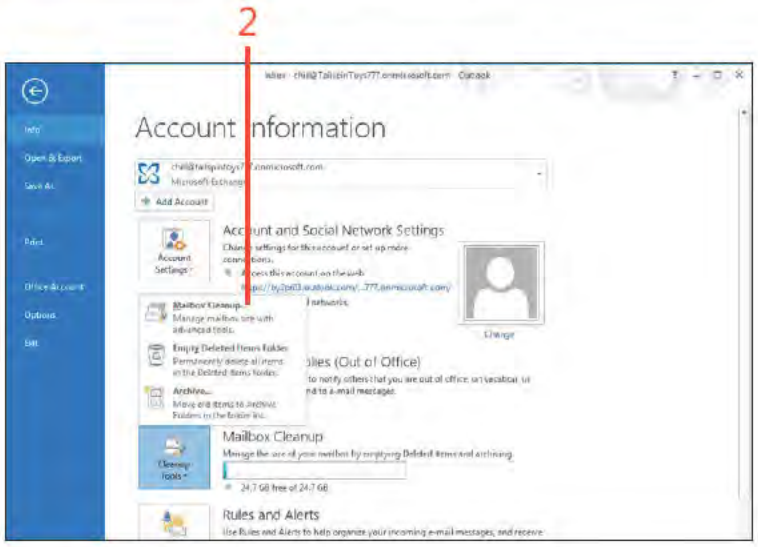
Use the Mailbox Cleanup tool

1 On the r bbon, c ck the F e tab to d sp ay the Backstage v ew

2 C ck C eanup Too s and then, on the menu that appears, c ck Ma box C eanup

(continued on next page)





SEE ALSO For information about setting AutoArchive options, see "Set the AutoArchive options" on page 241.

CAUTION Depending on the AutoArchive options set for a folder, messages older than a specific date might be removed from your current folders and placed in the Archive Folders. If you want to access a message that has been moved to these folders, open the folders from the Folder pane and view the message in the main Outlook window.

www.it-ebooks.info

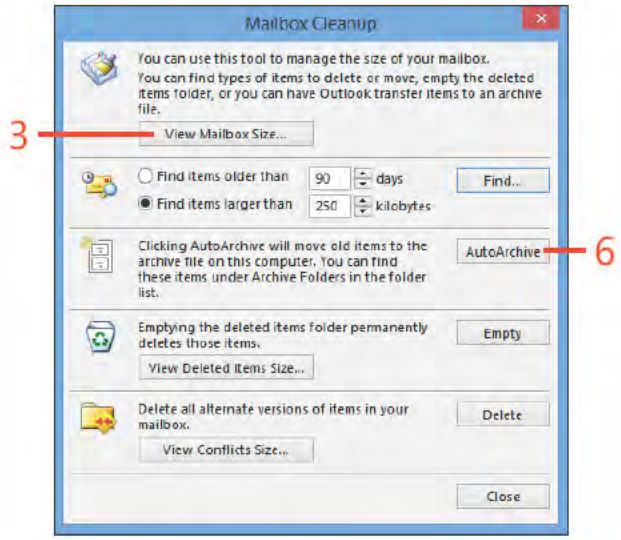
Use the Mailbox Cleanup tool *(continued)*

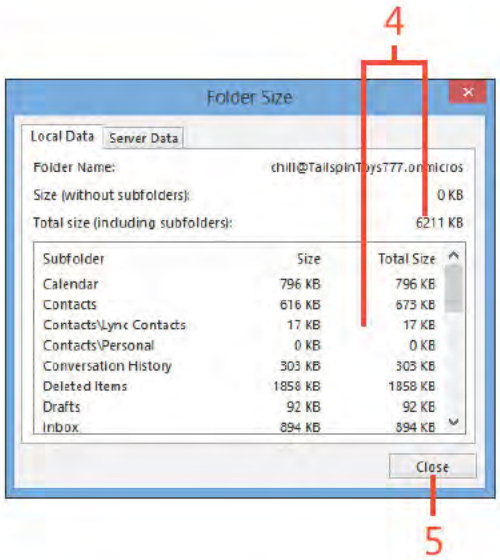
3 In the Ma box C eanup d a og box, c ck V ew Ma box S ze to d s- p ay the Fo der S ze d a og box

4 Rev ew the s ze of your ma box and other Out ook fo ders

5 C ck C ose

6 C ck AutoArch ve to beg n mmed ate y arch v ng tems based on the sett ngs you have def ned for AutoArch ve The Ma box C eanup d a og box c oses automat ca y wh e your ma s be ng arch ved





TIP You can use the two search options in the Mailbox Cleanup dialog box to search for messages that are older than a specified age or that are larger than a specified size. In the resulting search results window, you can select items and delete them from your mailbox. To delete these items, first select them in the Results pane, right-click the items, and then, in the shortcut menu that appears, click Delete. Or, alternatively, simply select the items and press the Delete key on the keyboard.

TRY THIS! Click View Deleted Items Size to view the amount of space taken up by your Deleted Items folder. Click Empty to permanently delete all items in the Deleted Items folder.

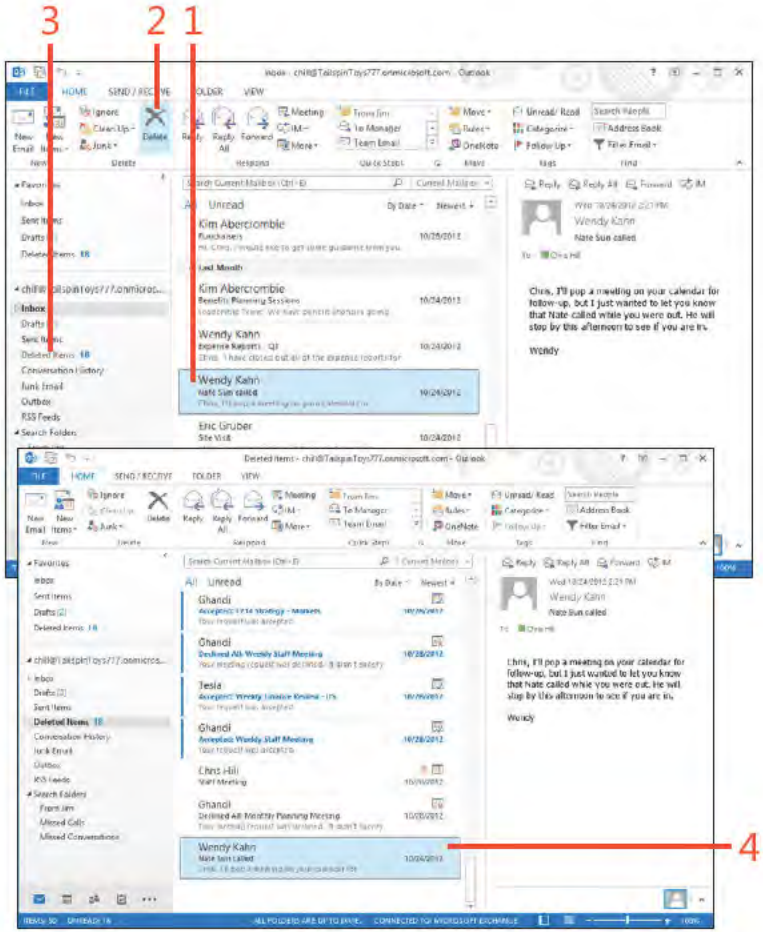
www.it-ebooks.info

Deleting items

Over time, your Outlook 2013 folders fill up and can seem unmanageable. Outlook makes it possible you to delete items when you no longer need them. When you delete an item, the program removes it from its current folder and places it in the Deleted Items folder.

Delete an item

1 In an Out ook fo der, choose the tem that you want to de ete
2 On the Home tab, n the De ete group, c ck the De ete button
3 To v ew de eted tems, n the Fo der pane, c ck De eted Items
4 The tem you just de eted appears n the st



CAUTION When you delete an item from within Outlook, no prompt appears asking whether you're sure you want to delete the item. Outlook immediately moves it to the Deleted Items folder. If you delete an item by mistake, press Ctrl+Z before continuing with any other tasks. You can also open the Deleted Items folder and drag the deleted item back to its original location.

TIP Outlook does not list items in the Deleted Items folder in the order in which they were deleted; instead, deleted emails are listed by the date they were sent or received.

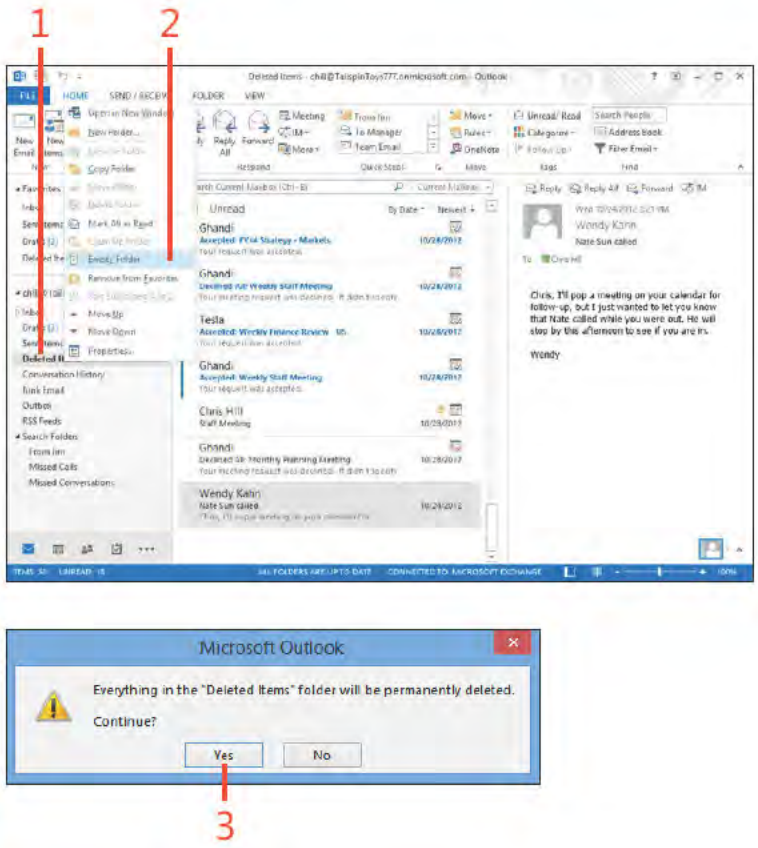
www.it-ebooks.info

Empty the Deleted Items folder

1 In the Fo der pane, r ght-c ck the De eted Items fo der

2 On the menu that appears, c ck the Empty Fo der

3 In the pop-up message box ask ng you to conf rm the de et on, c ck Yes to empty the De eted Items fo der



TRY THIS! To set up Outlook to empty the Deleted Items folder when you exit Outlook, in the Backstage view, click the Options tab. In the Outlook Options dialog box, click Advanced, click Empty Deleted Items Folders When Exiting Outlook, and then click OK. Keep in mind that all items in the Deleted Items folder will be permanently deleted when you exit Outlook.

SEE ALSO For information about managing the Inbox folder, including deleting unneeded messages, see "Managing the Inbox folder" on page 70.

www.it-ebooks.info

www.it-ebooks.info

Managing your Outlook files

13

When used without Microsoft Exchange Server, Microsoft Outlook 2013 stores your data—including all of your default and custom folders—in a personal folder file, or PST file. When used with Exchange, your mailbox resides on the server rather than on your computer. When you open Outlook, the program contacts the server to display your data.

Sometimes your computer can't communicate with the server because the server is offline or because you are unable to connect to the network. In these situations, Outlook can use a set of offline folders stored in an offline folder file, or OST file. Outlook stores data in the OST file and synchronizes the changes with the mailbox the next time it connects to the server.

This section explains how to perform several tasks with your Outlook data files, including how to add new data files, use an existing file, and import and export items. The section also explains how to back up and restore your Outlook data in a PST file and how to archive items.

In this section:

- Working with Outlook data files
- Importing and exporting items
- Backing up and restoring a data file
- Archiving Outlook data files

www.it-ebooks.info

Working with Outlook data files

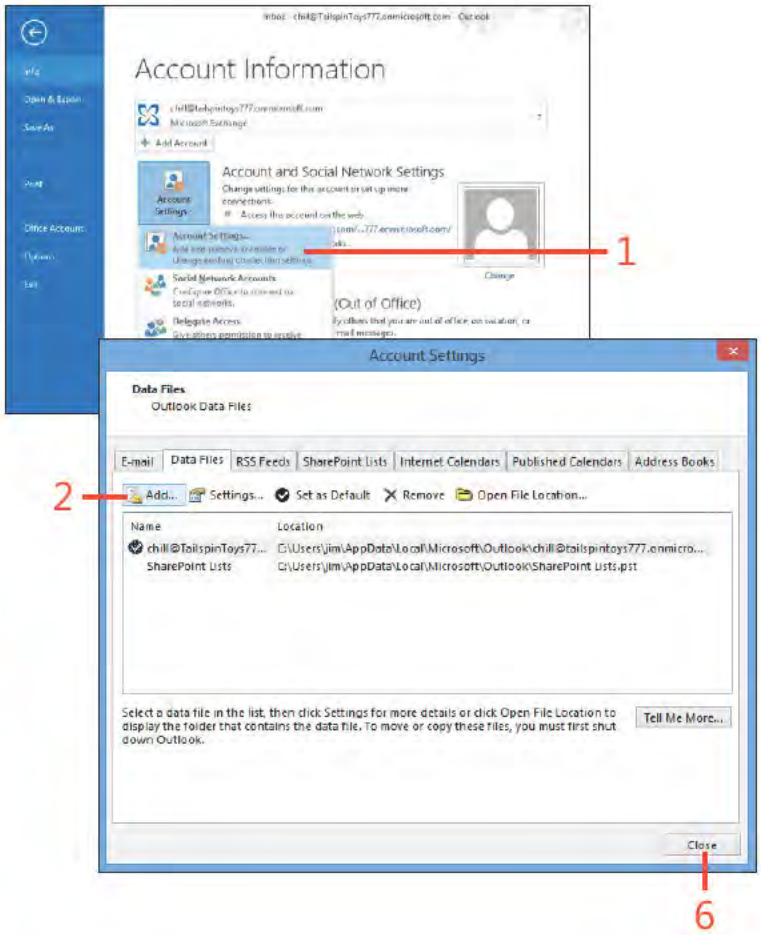
Unless your only email account is on an Exchange Server, Outlook 2013 creates a local data file for you when you set up your profile. You can easily create a new PST file and then add or remove folders to it as needed. When Exchange Server is the only account, Outlook stores all items in your Exchange Server mailbox.

Create a new personal data file

1 On the r bbon, c ck the F e tab to d sp ay the Backstage v ew C ck the Account Sett ngs button and then, on the menu that appears, c ck Account Sett ngs

2 In the Account Sett ngs d a og box, on the Data F es tab, c ck Add to open the Create Or Open Out ook Data F e d a og box

(continued on next page)



SEE ALSO For more information about working with Outlook folders, see "Exploring Outlook folders" on page 23.

TIP You can select an existing PST file in the Create Or Open Outlook Data File dialog box rather than create a new one. This method is good for moving a PST file from one computer to another. To do so, copy the PST to the new computer, open Outlook, and add the existing PST to your profile. You can then access all of the items in the old PST.

www.it-ebooks.info

Create a new personal data file *(continued)*

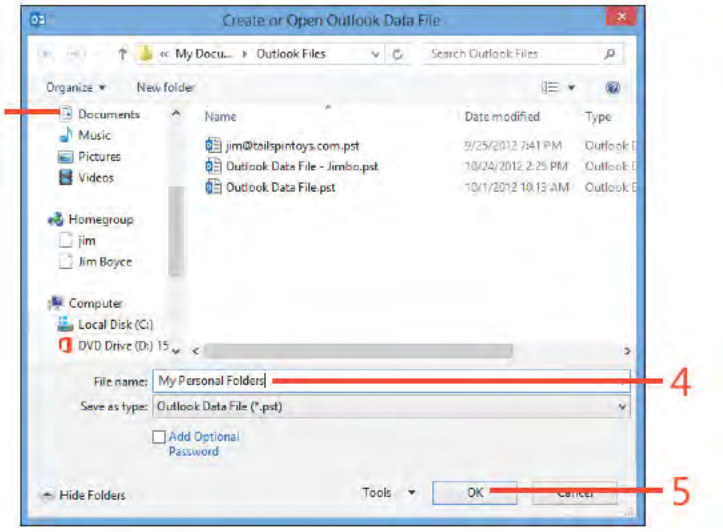
3 In the Create Or Open Out ook Data F e d a og box, browse for the ocat on you want (f other than the defau t ocat on)

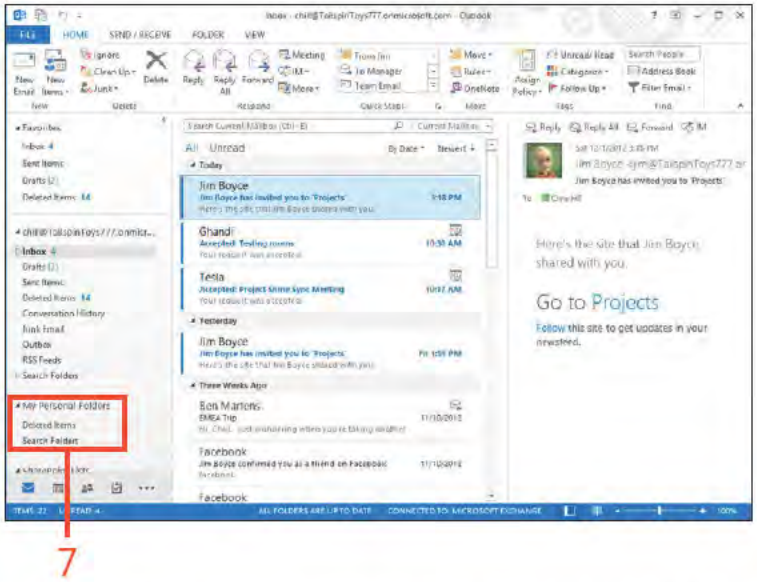
4 In the F e Name text box, type a name for the PST f e

5 C ck OK to save the changes and d sm ss the d a og box

6 C ck C ose (refer back to the screenshot on the prev ous page)

7 The new set of fo ders appears n your fo der st





TRY THIS! You can easily add folders to your new set of personal folders. Open Outlook, right-click in the folder list and then, on the shortcut menu that appears, click New Folder. Select a location in the new folder set, specify a name for the new folder, select the folder type, and then click OK to create the new folder.

www.it-ebooks.info

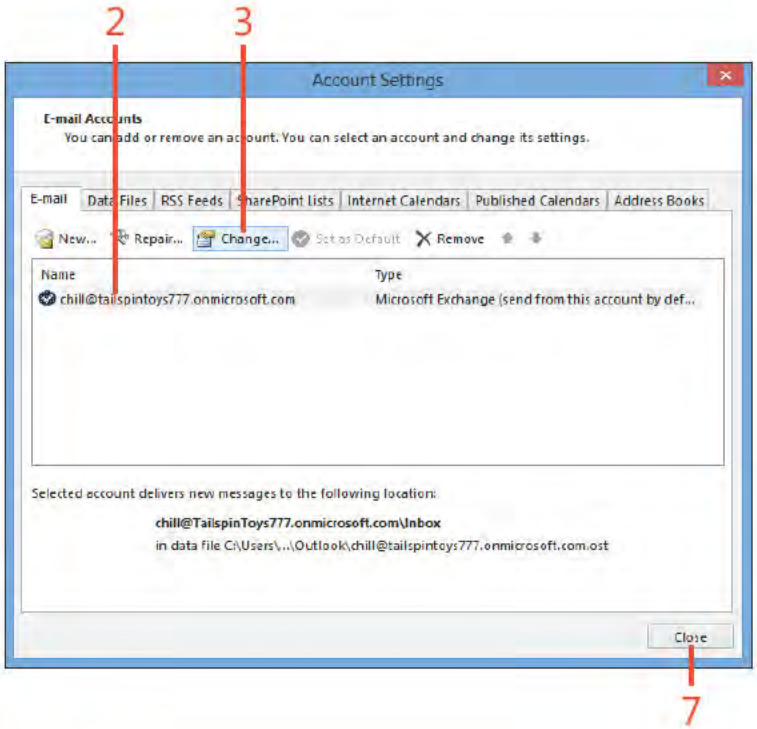
Configure Outlook for Cached Exchange Mode

1 On the r bbon, c ck the F e tab to d sp ay the Backstage v ew C ck the Account Sett ngs button and then, on the menu that appears, c ck Account Sett ngs

2 In the Account Sett ngs d a og box, on the E-Ma tab, c ck the Exchange Server account

3 C ck Change

(continued on next page)



TIP Outlook 2013 automatically synchronizes your folders when using Cached Exchange Mode. It detects when the server is available and then synchronizes your folders for you in the background.

www.it-ebooks.info

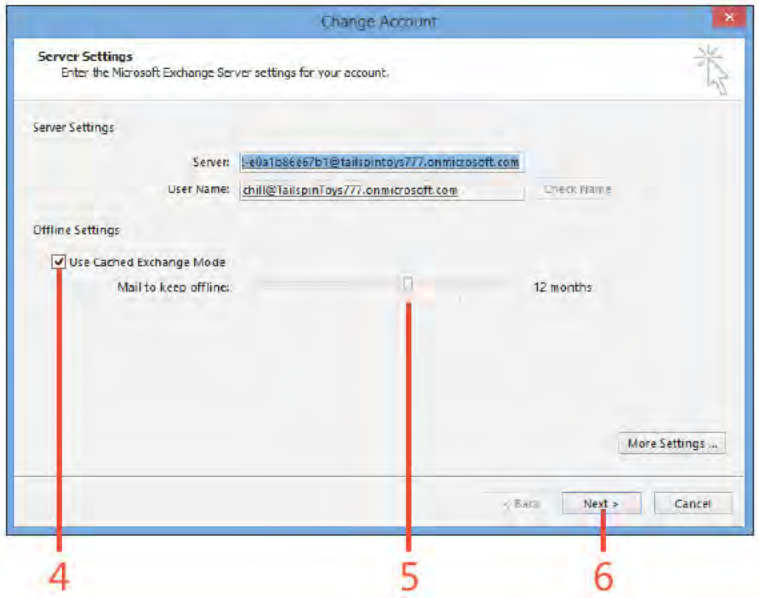
Configure Outlook for Cached Exchange Mode *(continued)*

4 In the Change Account d a og box, se ect the Use Cached Exchange Mode check box

5 Choose how many months of data to cache oca y

6 C ck Next and then c ck F n sh

7 C ck C ose, and then c ose and restart Out ook



CAUTION Your computer must be connected to the Exchange Server the first time you start Outlook with Cached Exchange Mode to enable Outlook to create a locally cached copy of your mailbox.

www.it-ebooks.info

Importing and exporting items

Although you probably do much of your work in Outlook 2013, occasionally you might want to move data into Outlook from other programs or export data from Outlook to another program. Outlook makes it easy to import and export items. This section shows how to import and export items to and from PST files.

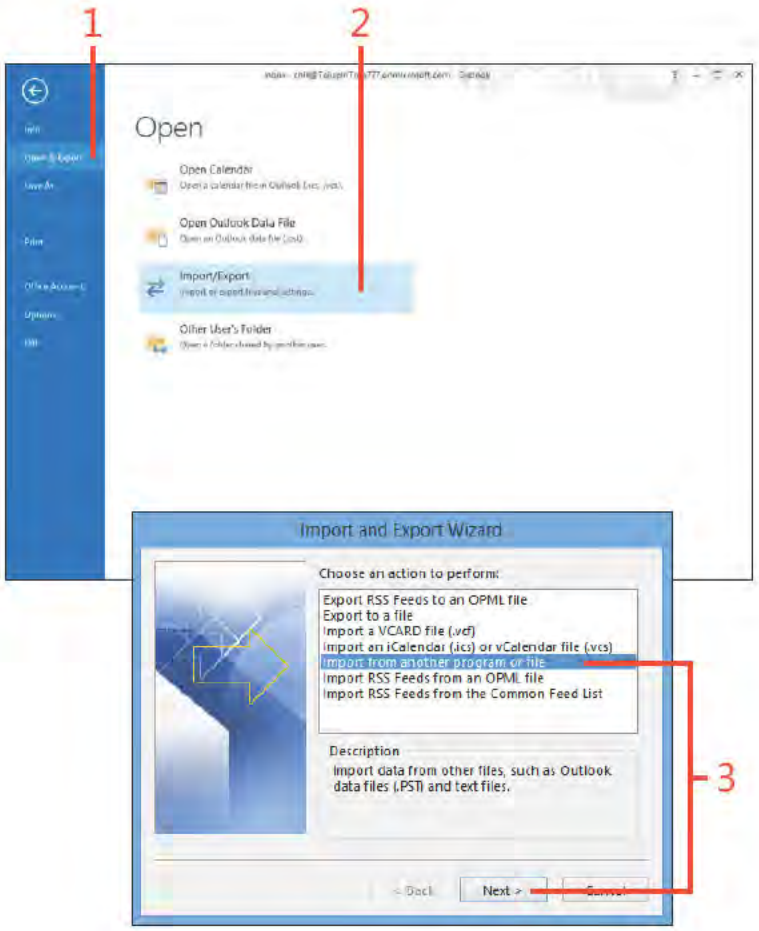
Import items into Outlook

1 On the r bbon, c ck the F e tab to d sp ay the Backstage v ew and then c ck the Open & Export tab

2 C ck Import/Export

3 On the f rst page of the Import And Export W zard, se ect Import From Another Program Or F e, and then c ck Next

(continued on next page)



www.it-ebooks.info

Import items into Outlook *(continued)*

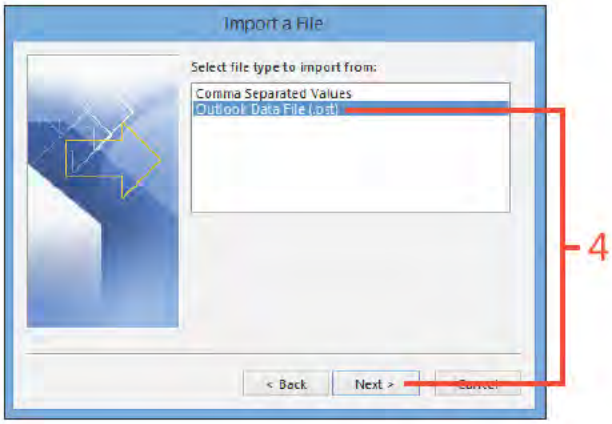
4 On the Import A F e page of the w zard, se ect Out ook Data F e, and c ck Next

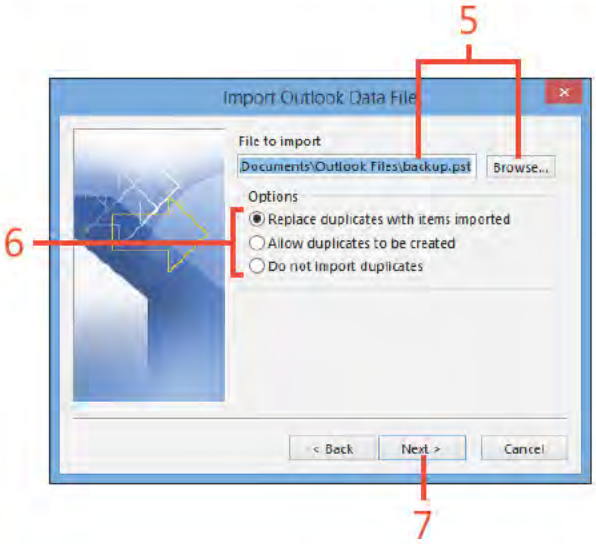
5 On the f rst Import Out ook Data F e page n the w zard choose the PST f e from wh ch you want to mport

6 C ck one of the opt ons to spec fy how you want dup cate tems to be hand ed

7 C ck Next

(continued on next page)





TIP You can use the import feature in Outlook to import messages and other items from other PST files, bring contacts from a Microsoft Access database or Microsoft Excel spreadsheet to your Contacts folder, and move other types of information from their original locations to other folders.

www.it-ebooks.info

Import items into Outlook *(continued)*

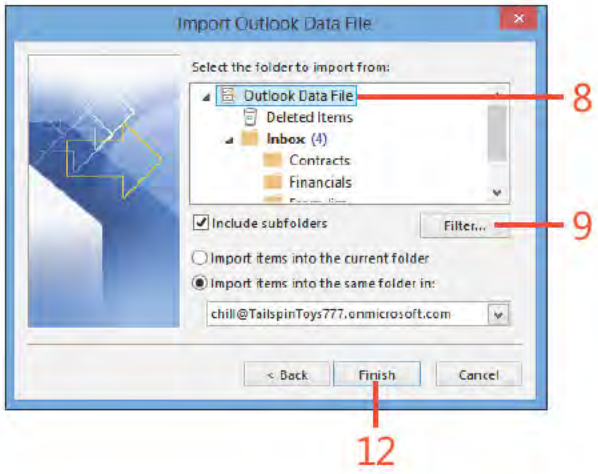
8 On the second Import Out ook Data F e page n the w zard, se ect the fo der from wh ch you want to mport tems

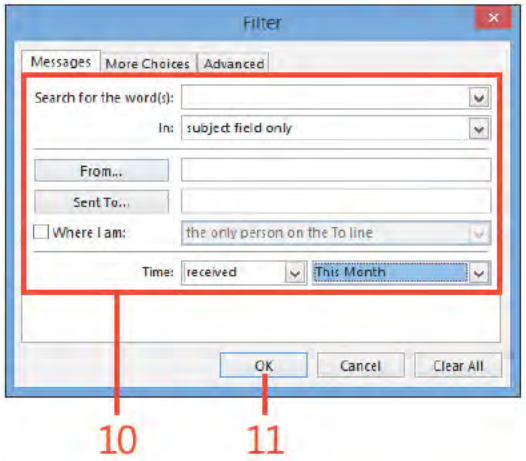
9 C ck F ter to open the F ter d a og box

10 Spec fy opt ons that def ne (f ter) the data that Out ook w mport

11 C ck OK to save the changes and d sm ss the d a og box

12 C ck F n sh to c ose the w zard





TRY THIS! Importing selected items from a PST file gives you an easy way to selectively copy Outlook items from one computer to another. Simply copy the PST file from the source computer to the destination computer, and then use the import feature to import only those items that you want on the destination computer.

TIP You can use the Filter dialog box to selectively import items. For example, perhaps you want to import only items that have the category Personal assigned to them. Or, maybe you want to import only messages that came from specific senders or only contacts that work for a particular company. Whatever the case, the Filter dialog box lets you control which items are imported.

www.it-ebooks.info

Export items from Outlook

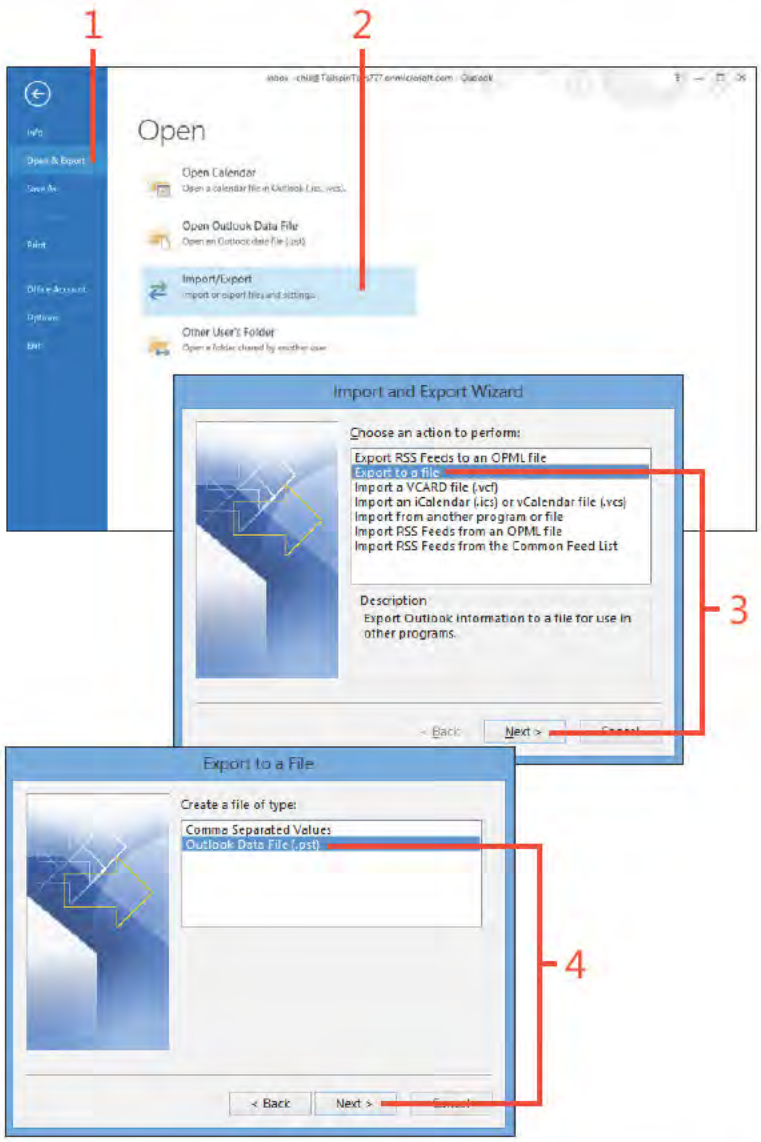
1 On the r bbon, c ck the F e tab to d sp ay the Backstage v ew and then c ck the Open & Export tab

2 C ck Import/Export

3 On the f rst page of the Import And Export W zard, se ect Export To A F e, and then c ck Next

4 On the Export To A F e page of the w zard, se ect Out ook Data F e (pst), and c ck Next

(continued on next page)



TIP You don't have to export to a new PST file. You can export items to an existing PST file. This method gives you a handy means of selectively backing up or archiving specific items. For example, you might back up selected items from your Exchange Server mailbox to a PST file on your local computer for archival.

SEE ALSO For more information about creating and using Outlook files, see "Working with Outlook data files" on page 228.

www.it-ebooks.info

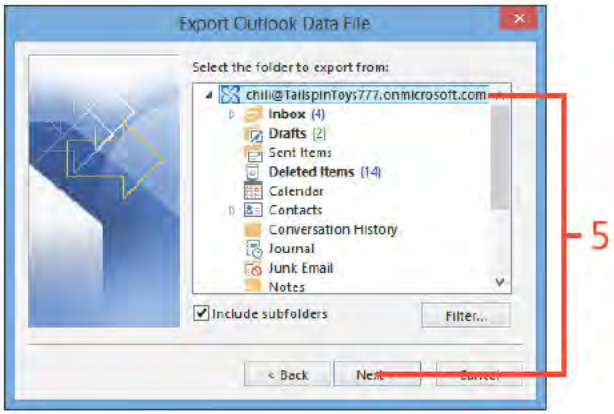
Export items from Outlook *(continued)*

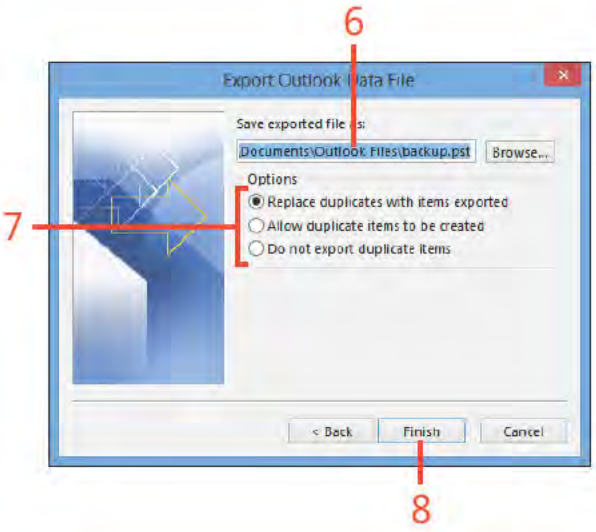
5 On the f rst Export Out ook Data F e page n the w zard, se ect the fo der from wh ch you want to export tems, se ect the Inc ude Subfo ders check box f you want to nc ude subfo ders of the se ected fo der, and then c ck Next

6 Spec fy the path and name of the f e to wh ch you want to export, or c ck Browse to se ect a f e

7 C ck one of the opt ons to spec fy how you want dup cate tems to be hand ed

8 C ck F n sh





TIP If you specify a file in step 6 that doesn't exist, Outlook displays the Create Outlook Data File dialog box after you click Finish. Simply click OK to create the file and complete the export process.

www.it-ebooks.info

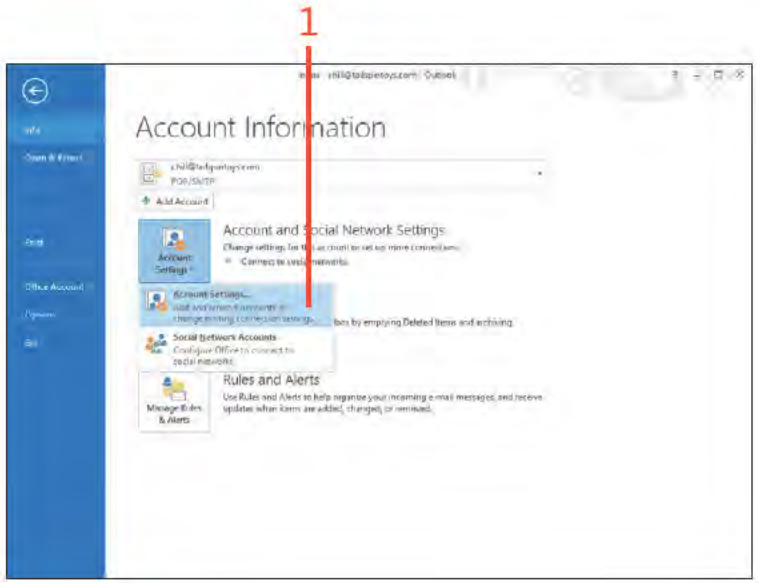
Backing up and restoring a data file

If you use a set of personal folders in a PST file as your only data store or in addition to an Exchange Server mailbox, back up that PST file so that your data is still available if your computer experiences a problem, such as a failed hard disk. Having the PST file backed up allows you to restore the file and recover your data.

Back up Outlook data

1 On the r bbon, c ck the F e tab to d sp ay the Backstage v ew C ck the Account Sett ngs button and then, on the menu that appears, c ck Account Sett ngs

(continued on next page)



CAUTION Don't back up your PST file to the hard disk it's currently on. If that hard disk fails, you lose both copies of the file. Instead, back up the file to another hard disk, if your computer has more than one, or to another backup unit, network location, or flash drive.

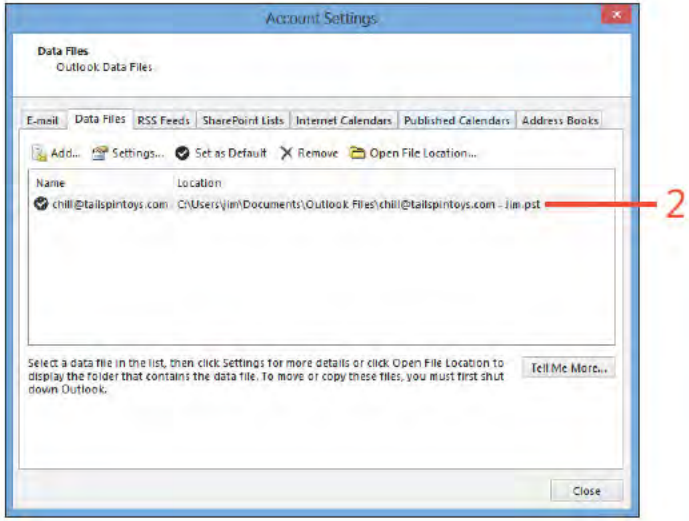
TIP Set up a regular backup schedule for your PST file, and ensure that you back it up frequently to avoid losing any data.

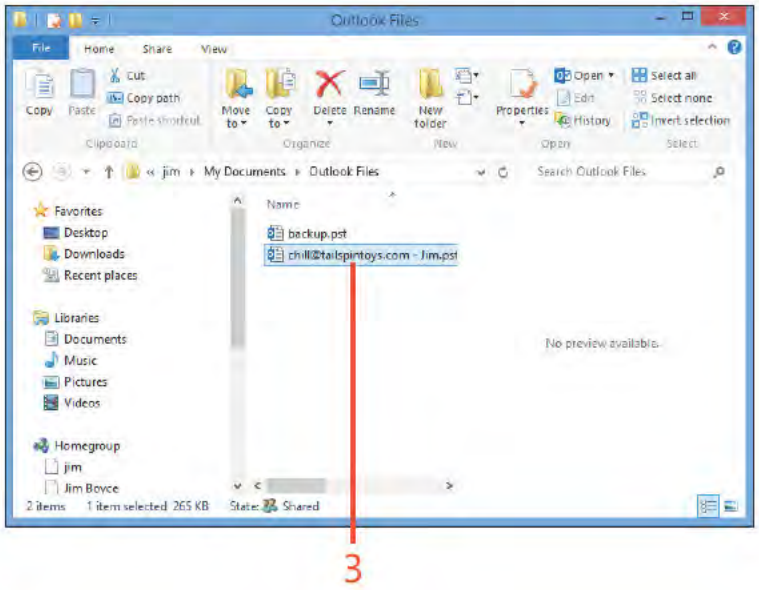
www.it-ebooks.info

Back up Outlook data *(continued)*

2 In the Account Sett ngs d a og box, c ck the Data F es tab, and then note the fu path to the PST f e

3 C ck C ose, and then ex t Out ook Open the f e's ocat on and copy the f e to a backup ocat on, such as a USB f ash dr ve





CAUTION Make sure that you close Outlook before making a backup copy of your PST file.

www.it-ebooks.info

Restore Outlook data

1 Ex t Out ook In W ndows Exp orer, open the fo der that conta ns the backup f e

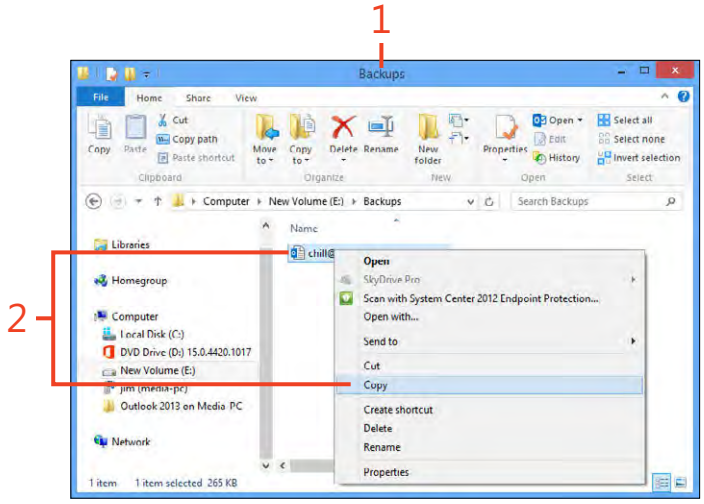
2 R ght-c ck the backup f e and then, on the shortcut menu that appears, c ck Copy

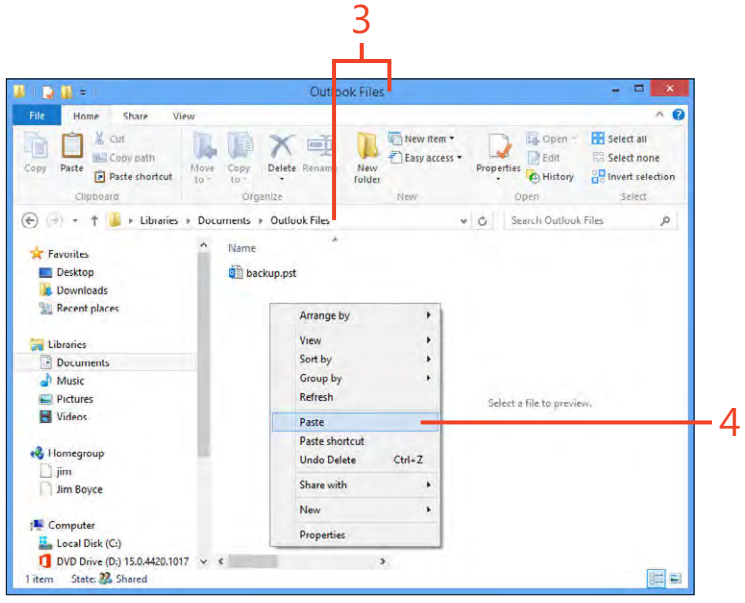
3 Open the or g na ocat on for the f e

Th s ocat on s the one recorded n the Persona Fo ders d a og box for the f e, as descr bed n the prev ous procedure

4 R ght-c ck and then, on the shortcut menu that appears, c ck Paste

(continued on next page)

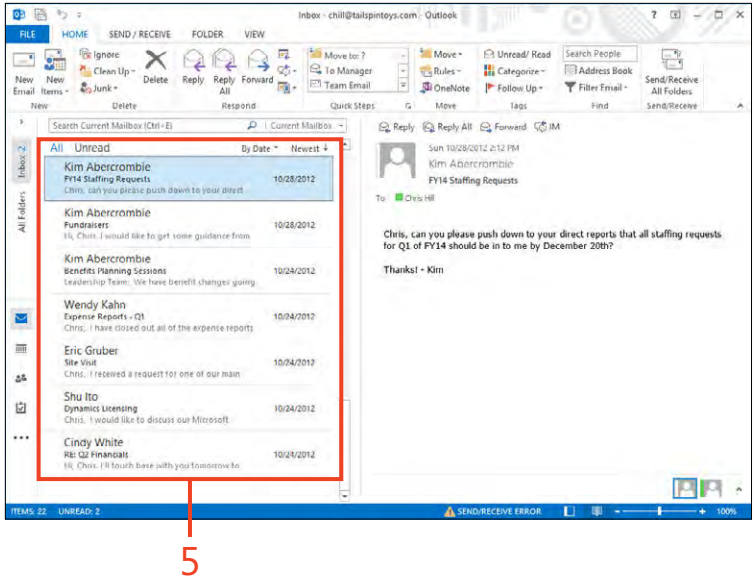




www.it-ebooks.info

Restore Outlook data *(continued)*

5 Start Out ook and ver fy that your data tems are ntact



www.it-ebooks.info

Archiving Outlook data files

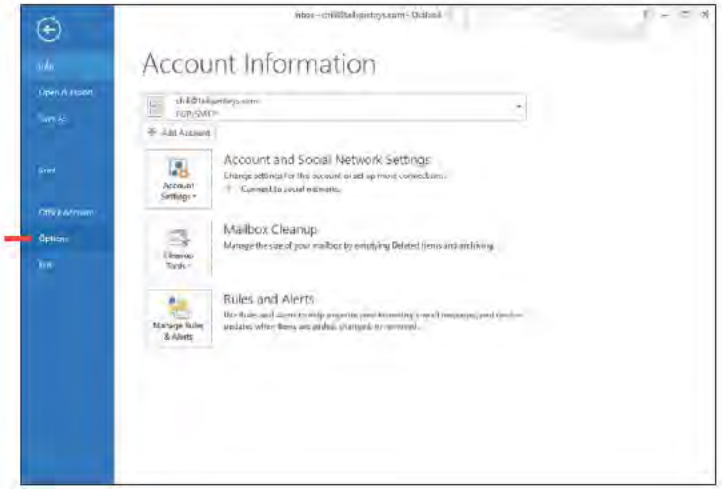
Old messages, tasks, and other items have a tendency to pile up unless you clean them out. Outlook 2013 provides an AutoArchive feature with which you can specify how often Outlook should clean out old items, where it should place those items (or whether it should delete them), which items to move, and so on.

If you choose to archive items rather than delete them, Outlook places them in a PST file of your choosing. You can then recover them by opening that set of folders and copying the items back to your regular folders or by using the import feature in Outlook to import from the archive file.

Set the AutoArchive options

1 On the r bbon, c ck the F e tab to d sp ay the Backstage v ew and then c ck the Opt ons tab

(continued on next page)



TIP A network administrator can set retention policies that control your AutoArchive settings. Be aware that this might prevent certain archive operations you might otherwise configure through your AutoArchive settings.

www.it-ebooks.info

Set the AutoArchive options *(continued)*

2 In the Out ook Opt ons d a og box, n the pane on the eft, c ck Advanced

3 C ck AutoArch ve Sett ngs

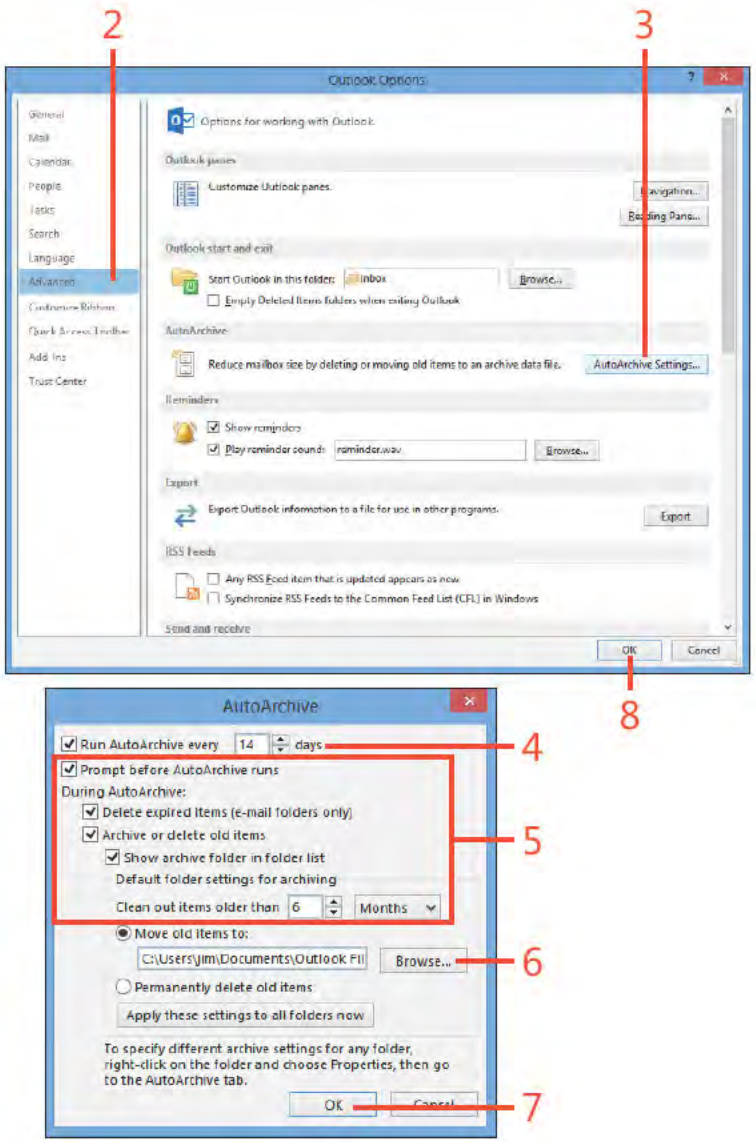
4 In the AutoArch ve d a og box, se ect the Run AutoArch ve Every check box Spec fy how frequent y you want Out ook to automat - ca y arch ve tems

5 Se ect your preferred opt ons to spec fy how Out ook w arch ve tems

6 Spec fy the ocat on of the arch ve PST f e

7 C ck OK to save the changes and d sm ss the d a og box

8 C ck OK to c ose the Out ook Opt ons d a og box



CAUTION Select the Prompt Before AutoArchive Runs check box if you want to control whether Outlook archives items. If you don't select this option, Outlook performs the archive operation without warning you.

TIP Back up your archive file each time you back up your PST file to ensure that you can recover archived items if a system or drive failure causes you to lose your regular archive file.

www.it-ebooks.info

Archive to an Outlook data file

1 C ck F e to d sp ay the Backstage v ew, scro down, c ck C eanup Too s, and then, on the menu that appears, c ck Arch ve

2 In the Arch ve d a og box, f you want to arch ve a fo ders by us ng the AutoArch ve sett ngs, c ck the Arch ve A Fo ders Accord ng To The r AutoArch ve Sett ngs opt on

3 A ternat ve y, c ck the Arch ve Th s Fo der And A Subfo ders opt on f you want to arch ve on y the se ected fo der and ts subfo ders

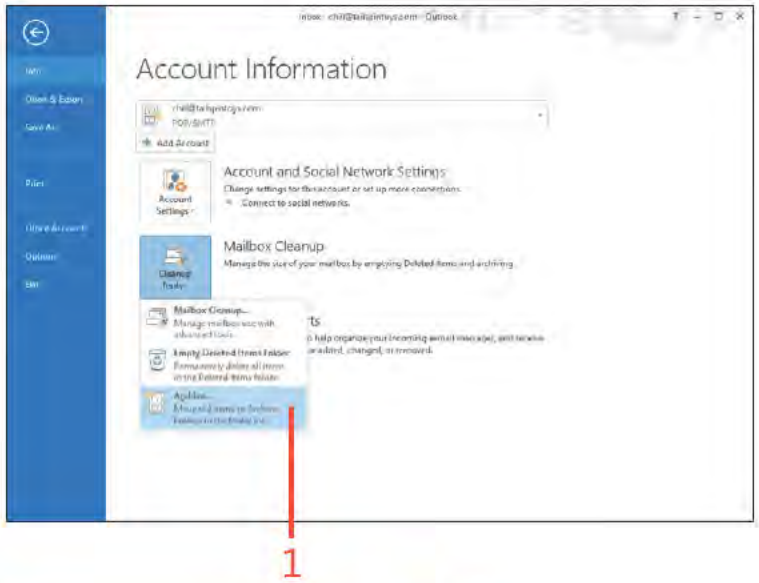
4 If the opt on descr bed n step 3 s se ected, se ect the fo der from wh ch you want to arch ve tems

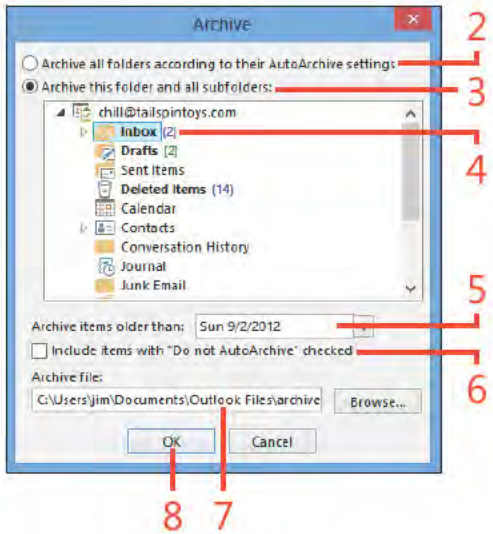
5 Spec fy how o d tems must be to be arch ved

6 Se ect the Inc ude Items W th "Do Not AutoArch ve" Checked check box to arch ve tems that wou d otherw se be sk pped because you have conf gured them not to AutoArch ve

7 Se ect the f e n wh ch you want to store the arch ved tems

8 C ck OK to arch ve the tems





SEE ALSO For more information about backing up PST files, see "Backing up and restoring a data file" on page 237.

TRY THIS! Test your ability to recover archived items. Open the AutoArchive dialog box, and note the location of your archive file. Review the "Import items into Outlook" task earlier in this section, and import a selection of items from your archive PST file.

www.it-ebooks.info

www.it-ebooks.info

Customizing Outlook

14

Although you can use Microsoft Outlook 2013 out of the box, one of its finest features is its ability to let you tailor it to look and work the way you want. You can customize Outlook in a number of ways. You can choose formats for messages to personalize outgoing mail messages. Using Calendar, you can set up holiday schedules to match those recognized by your business or organization and specify your workweek. For example, if your workweek differs from the traditional 8:00 A.M. to 5:00 P.M., Monday through Friday, you can change Outlook's Calendar views to match the days and hours that you work, at least in most cases.

In addition, you can customize the ribbon and Quick Access Toolbar to suit the way you use Outlook and make frequently used features easily accessible. Outlook offers yet many other ways to adapt to your preferences. These topics and others related to customizing your Outlook experience are covered in this section.

In this section:

- Using read and delivery receipts
- Choosing message formats
- Setting Calendar options
- Customizing the Folder pane
- Customizing the Outlook ribbon
- Customizing the Quick Access Toolbar

www.it-ebooks.info

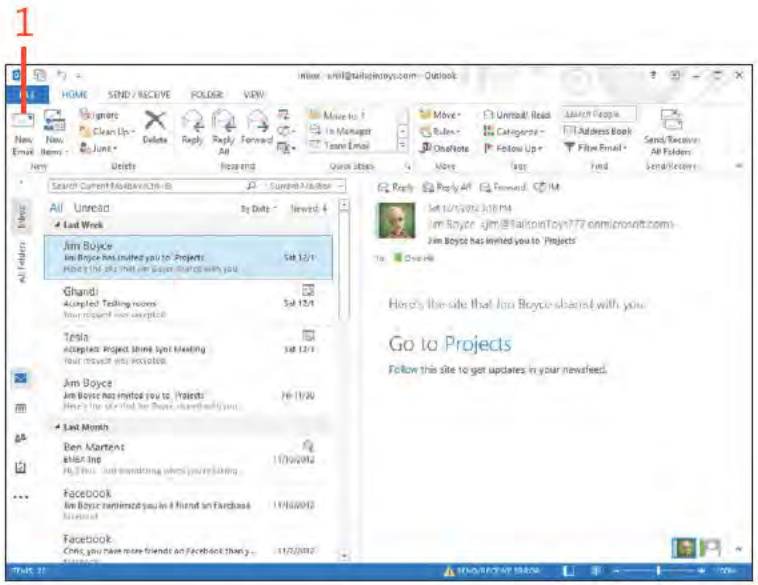
Using read and delivery receipts

Outlook 2013 can help you manage your email messages by keeping track of when those messages are delivered and read by their recipients. This is handy when you send a time-sensitive email and you want to know when the recipients received and read the message. A delivery receipt confirms delivery of the message to the recipient's Inbox, while a read receipt confirms that the recipient has viewed the message.

Use read and delivery receipts on individual messages

1 Open the Inbox and then, on the Home tab, n the New group, c ck New Ema to start a new ema message

(continued on next page)



TIP In the Properties dialog box for the message, you can set priority levels for an email message. Click the Importance drop-down list and select Low, Normal, or High. Low or High importance messages are sent at the same speed as Normal, but the recipient sees a symbol that indicates the message's importance.

www.it-ebooks.info

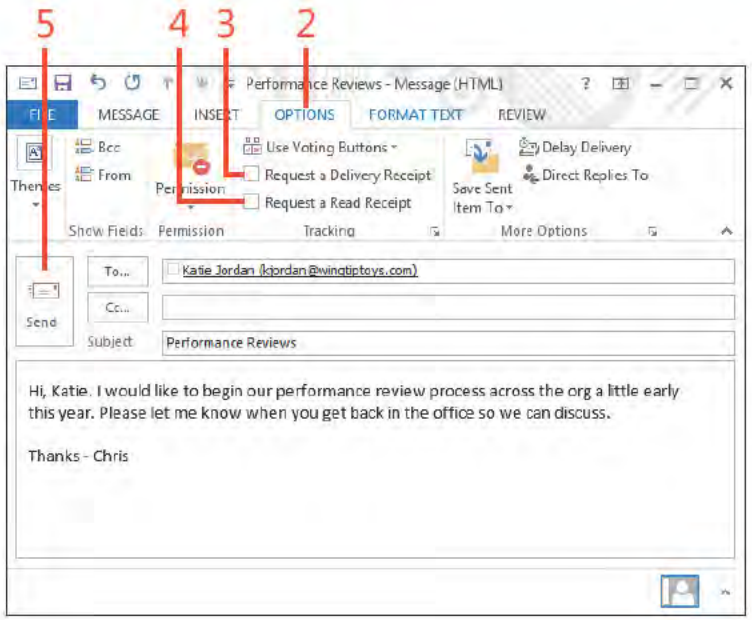
Use read and delivery receipts on individual messages *(continued)*

2 On the r bbon, c ck the Opt ons tab

3 Se ect the Request A De very Rece pt check box

4 Se ect the Request A Read Rece pt check box

5 Compose the ema as you norma y wou d and then c ck Send Out ook sends you a de very rece pt when the message s de vered to the user's ma box (a though not a ma servers send de very rece pts)



TRY THIS To set Outlook so that all messages have a delivery and read receipt, click the File tab to display the Backstage view, click the Options tab, and then, in the Outlook Options dialog box, click Mail. Scroll down to the Tracking group and select Read Receipt Confirming The Recipient Viewed The Message and Delivery Receipt Confirming The Message Was Delivered To The Recipient's Email Server.

www.it-ebooks.info

Choosing message formats

When you create new email messages in Outlook 2013, you can specify the format in which the message should be created. The format you choose must be supported by the email program used by the recipient of the message. You can also set up your environment so that all your messages use the same format. You can choose from Plain Text, Rich Text, or HTML as the default. If you want to embed graphics or format text in a message, you must use Rich Text or HTML.

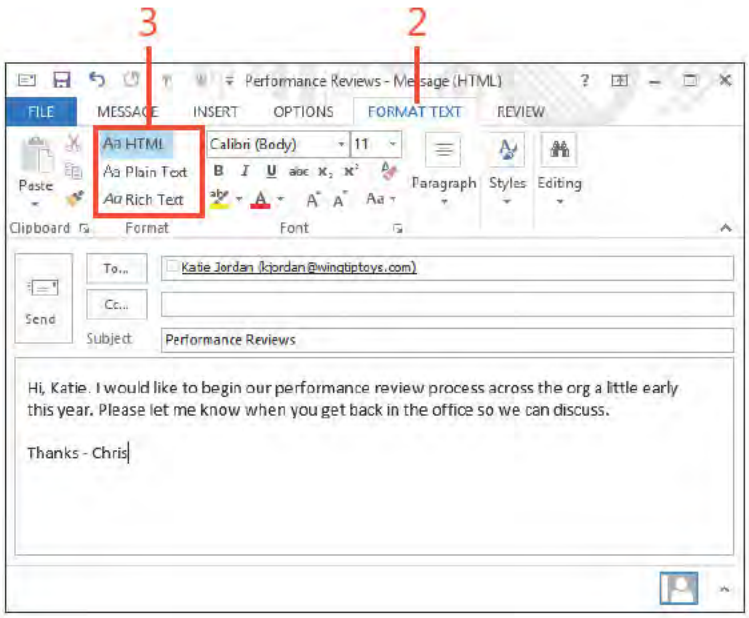
Select a format for a single message

1 Create a new message

2 On the r bbon, c ck the Format Text tab

3 In the Format group, choose a format for the message

- To create a message w thout formatt ng, choose P a n Text
- To create a message w th HTML support, such as embedded tab es, nserted p ctures, and ve hyper nks, choose HTML
- To create a message w th r ch text formatt ng support, such as embedded objects, font spec f cat ons, and co ored text, choose R ch Text



SEE ALSO For information about using Rich Text or HTML message formats, see "Formatting message text" on page 47.

TIP If you aren't sure of the format that your recipient can read, use the Plain Text option. This ensures that nothing is lost in the translation if your recipient's email program doesn't support Rich Text or HTML messages.

www.it-ebooks.info

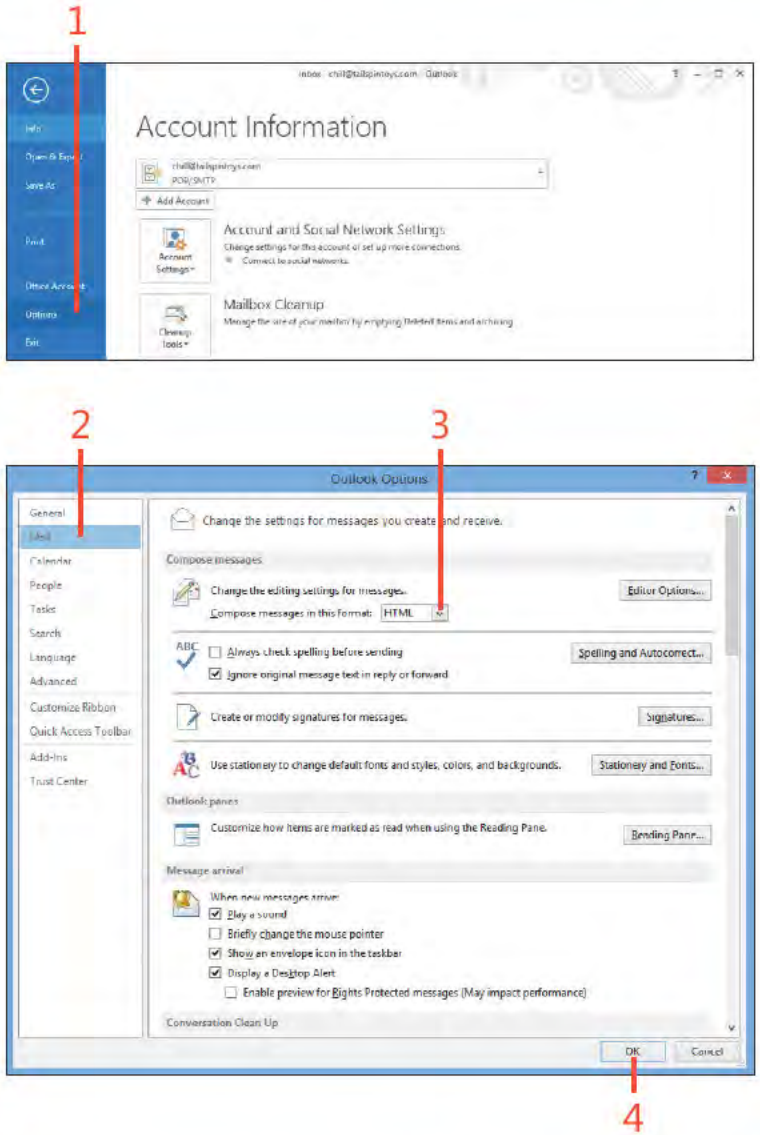
Select a default message format

1 On the r bbon, c ck the F e tab to d sp ay the Backstage v ew Then, c ck the Opt ons tab

2 In the Out ook Opt ons d a og box, n the co umn on the eft, c ck the Ma tab

3 C ck the Compose Messages In Th s Format drop-down st and choose the format that you want to use for a your messages

4 C ck OK



SEE ALSO For more about formatting information in your messages, see "Add formatting to a message" on page 48.

TIP With HTML formatting, your messages can include pictures that are located on the Internet. To embed a picture instead of creating a hyperlink to it, on the ribbon, click the Insert tab. Then, in the Illustrations group, click Picture. In the Insert Picture dialog box, click in the file name text box and type the picture's URL. Next, click the drop-down arrow beside the Insert button and choose Insert And Link. Outlook retrieves a copy of the image and embeds it in the message.

www.it-ebooks.info

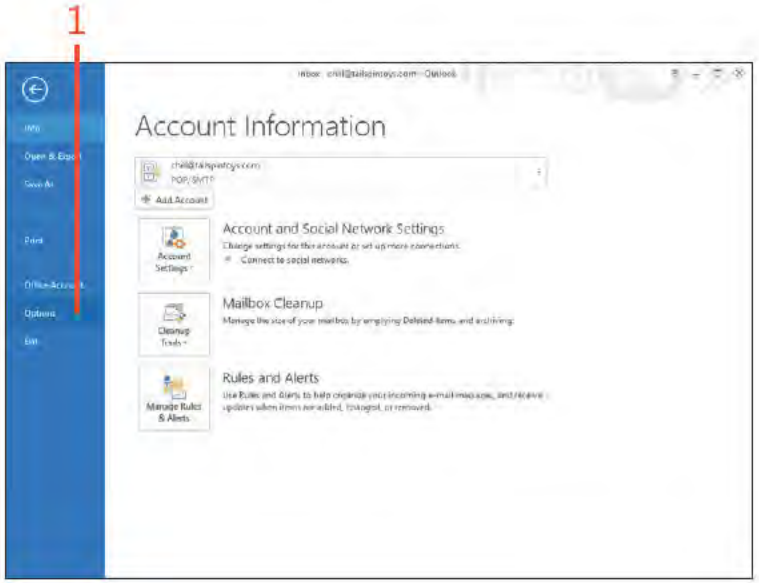
Setting Calendar options

You can change the way Calendar works in Outlook 2013. You can change the default Monday through Friday workweek to one that is specific to your schedule (perhaps you work Wednesday through Saturday). You also can set up holidays that aren't traditionally observed in your country or region.

Set the workweek

1 On the r bbon, c ck the F e tab to d sp ay the Backstage v ew Then, c ck the Opt ons tab

(continued on next page)



TIP You can specify which day of the week is the first day for you. To do so, in the Outlook Options dialog box, click the First Day Of Week drop-down list and then click a day .

TRY THIS Change your work hours to begin at 12:00 A.M. and end at 7:00 A.M. In the folder pane, click the Calendar icon and then, on the Home tab, click the Day button. Notice how the 12–7 range is shown in white to indicate your workday hours.

www.it-ebooks.info

Set the workweek *(continued)*

2 In the Out ook Opt ons d a og box, n the co umn on the eft, c ck the Ca endar tab

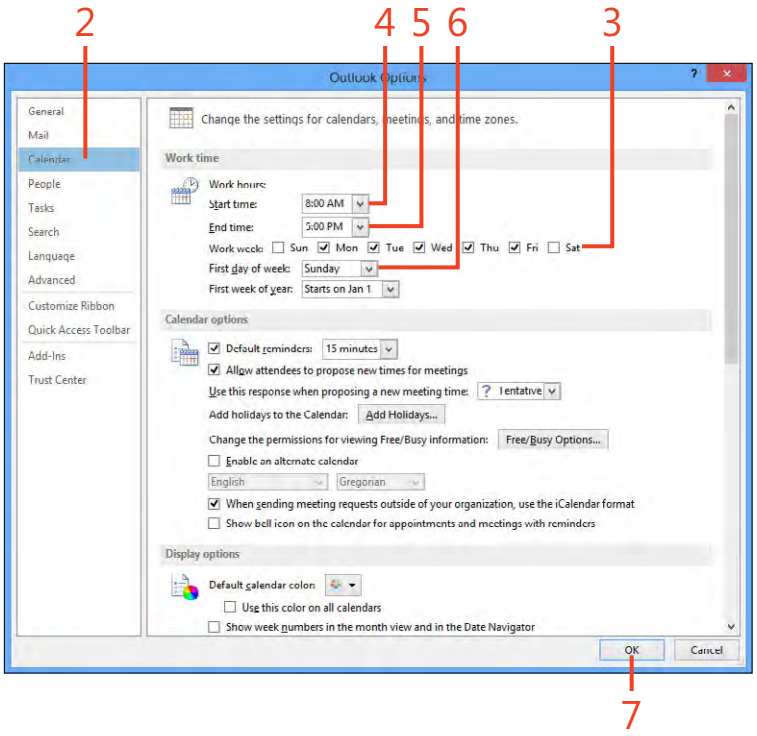
3 Se ect the days of the week that you work

4 C ck the Start T me drop-down st and se ect the t me your workday beg ns

5 Do the same n the End T me st for the end of your workday

6 Choose the start day for your workweek

7 C ck OK



Add holidays

1 On the r bbon, c ck the F e tab to d sp ay the Backstage v ew Then, c ck the Opt ons tab

(continued on next page)

www.it-ebooks.info

Add holidays *(continued)*

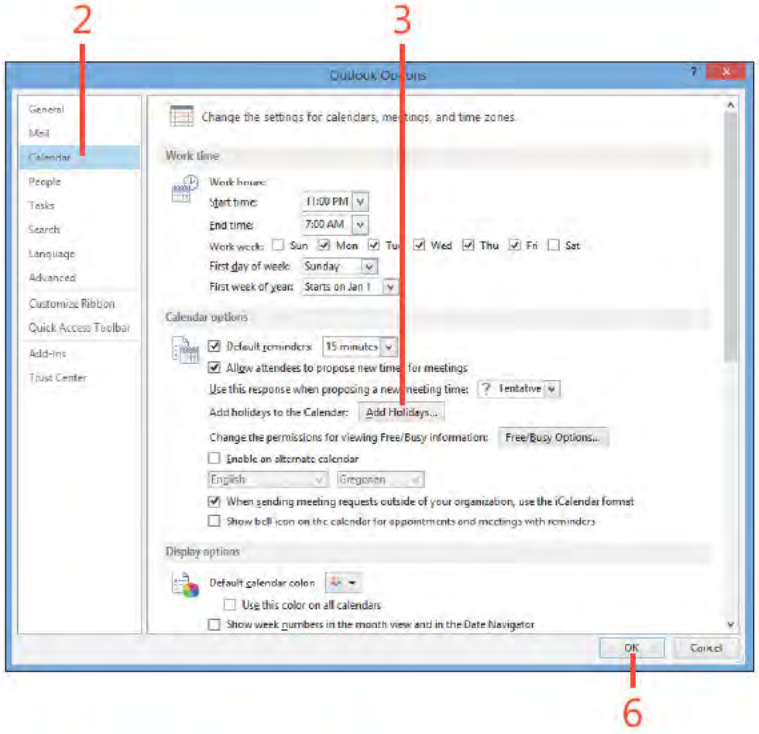
2 In the Out ook Opt ons d a og box, n the co umn on the eft, c ck the Ca endar tab

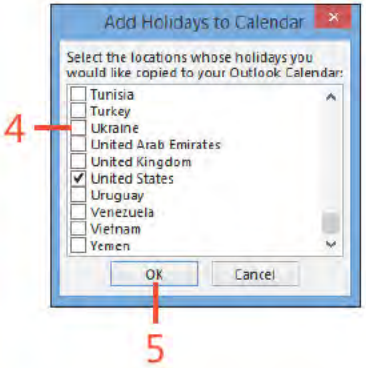
3 C ck Add Ho days

4 In the Add Ho days To Ca endar d a og box, se ect the country or ho day set that nc udes the ho days that you want to add to your Ca endar

5 C ck OK to save the sett ngs and c ose the d a og box

6 C ck OK to c ose the Out ook Opt ons d a og box





TIP If you want to add a nontraditional holiday to Calendar, set it up as an event in your Calendar folder.

SEE ALSO For information about adding events to Calendar, see "Adding appointments" on page 133 and "Adding an event" on page 136.

www.it-ebooks.info

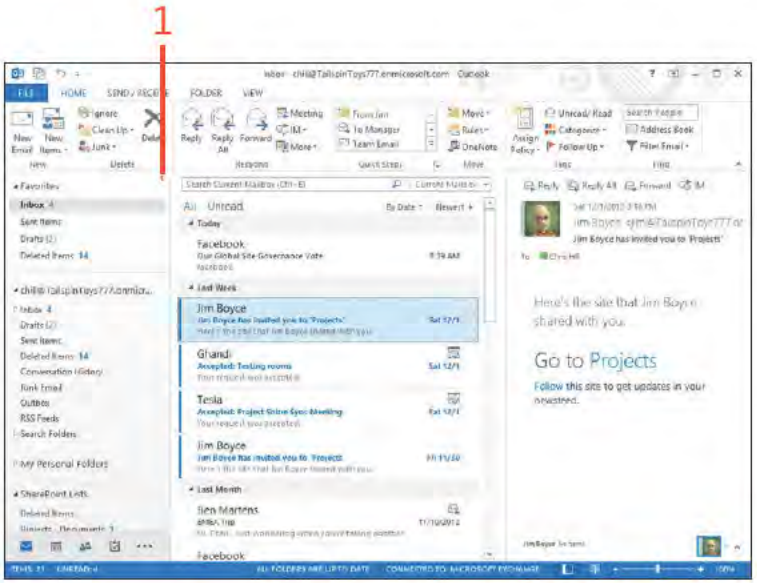
Customizing the Folder pane

The Folder pane includes icons that you can click to quickly open an Outlook folder. You can customize it in several ways, such as by hiding it when you want more room to see items in Outlook or by adding or removing folders from it. You can also change the order in which the folders are displayed in the Folder pane.

Show or hide the Folder pane

1 In the upper-r ght corner of the Fo der pane, c ck the M n m ze The Fo der Pane button

(continued on next page)



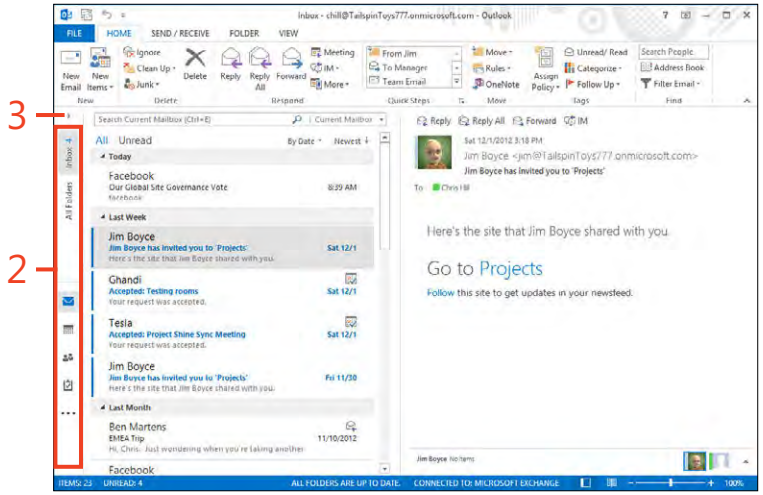
SEE ALSO To learn more about the Folder pane, see "Exploring Outlook folders" on page 23.

www.it-ebooks.info

Show or hide the Folder pane *(continued)*

2 The Fo der pane m n m zes

3 At the top of the m n m zed pane, c ck the Expand The Fo der Pane button to expand the pane aga n



www.it-ebooks.info

Add or remove Folder pane items

1 On the r bbon, c ck the V ew tab

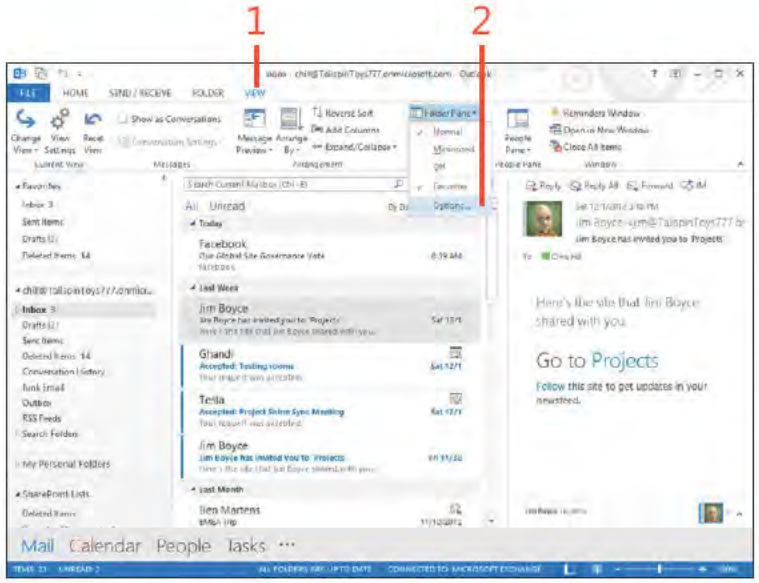
2 In the Layout group, c ck Fo der Pane On the menu that appears, c ck Opt ons

3 In the Nav gat on Opt ons d a og box, se ect the Compact Nav ga- t on check box to use sma cons nstead of fo der names

4 Spec fy the number of fo ders to show n the Fo der pane

5 To change the d sp ay order of a fo der, se ect the fo der, and then c ck Move Up or Move Down, as needed

6 C ck OK



TIP You can hide the Folder pane by choosing Folder Pane from the View tab on the ribbon and then choosing Minimized.

TRY THIS Minimize the Folder pane by clicking the left-pointing arrow at the upper-right corner in the Folder pane.

www.it-ebooks.info

Adding Outlook folders and SharePoint sites to the Shortcuts page

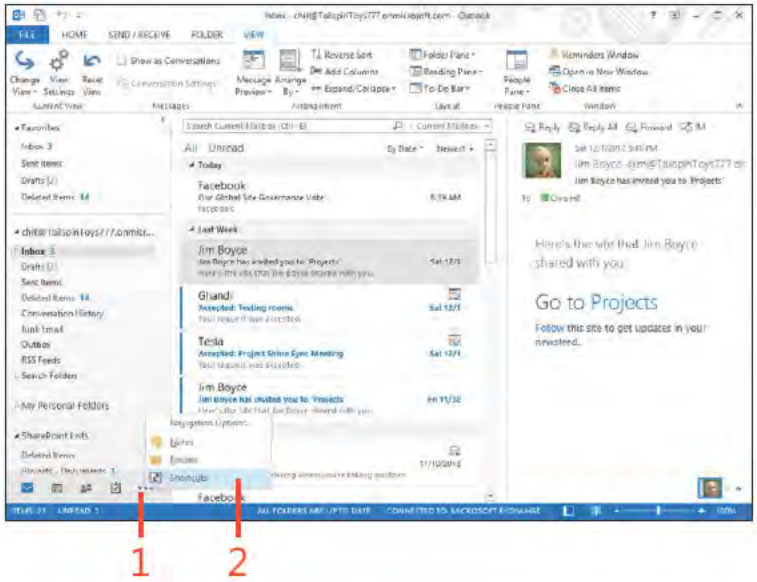
You can use the Shortcuts page in the Folder pane to add your own shortcuts and navigate quickly to those items from Outlook 2013. For example, if you have a certain combination of Mail, Calendar, Contact, and other Outlook folders, along with some SharePoint sites that you use regularly, you can add shortcuts to each on the Shortcuts page so that you can quickly and easily navigate to them.

Add a shortcut group to the Folder pane

1 In the Fo der pane, c ck the Fo der Opt ons button

2 On the menu that appears, c ck Shortcuts

(continued on next page)



TRY THIS Add several shortcut groups to help you access Outlook items that you use often. For example, create a new contacts folder to store your personal contacts separately from your business contacts. Create a shortcut to that folder in the Shortcuts list. When you want to open that folder, just click its icon in the shortcut group. Add all of your most frequently used Outlook folders to the list.

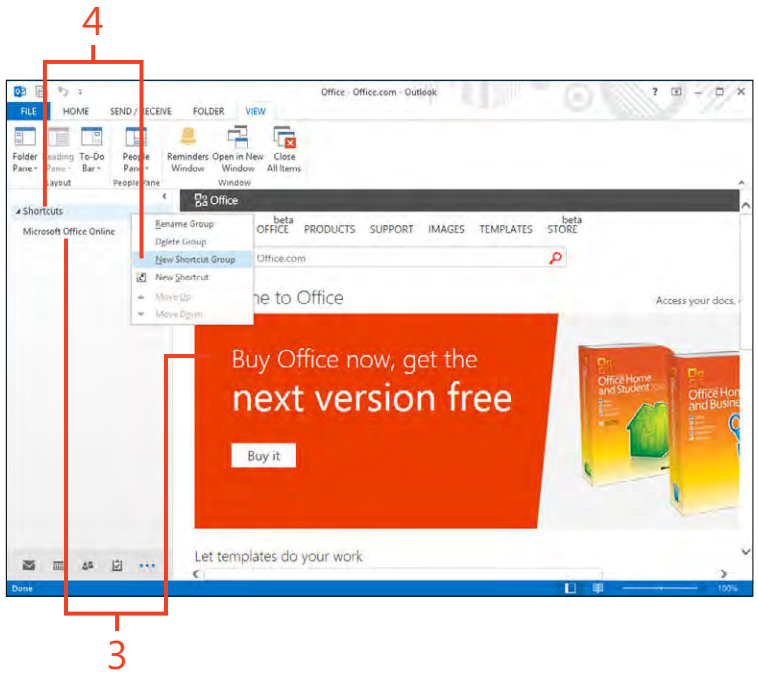
www.it-ebooks.info

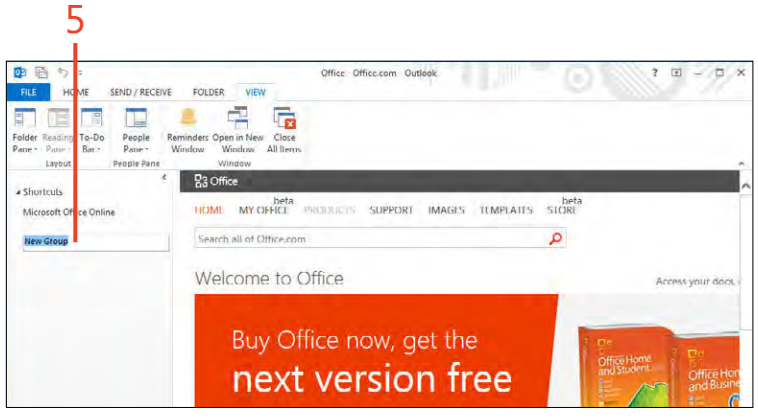
Add a shortcut group to the Folder pane *(continued)*

3 C ck a shortcut to v ew t n Out ook

4 In the Fo der pane, r ght-c ck Shortcuts and then, on the shortcut menu that appears, c ck New Shortcut Group

5 Type a new name for the group and press Enter





www.it-ebooks.info

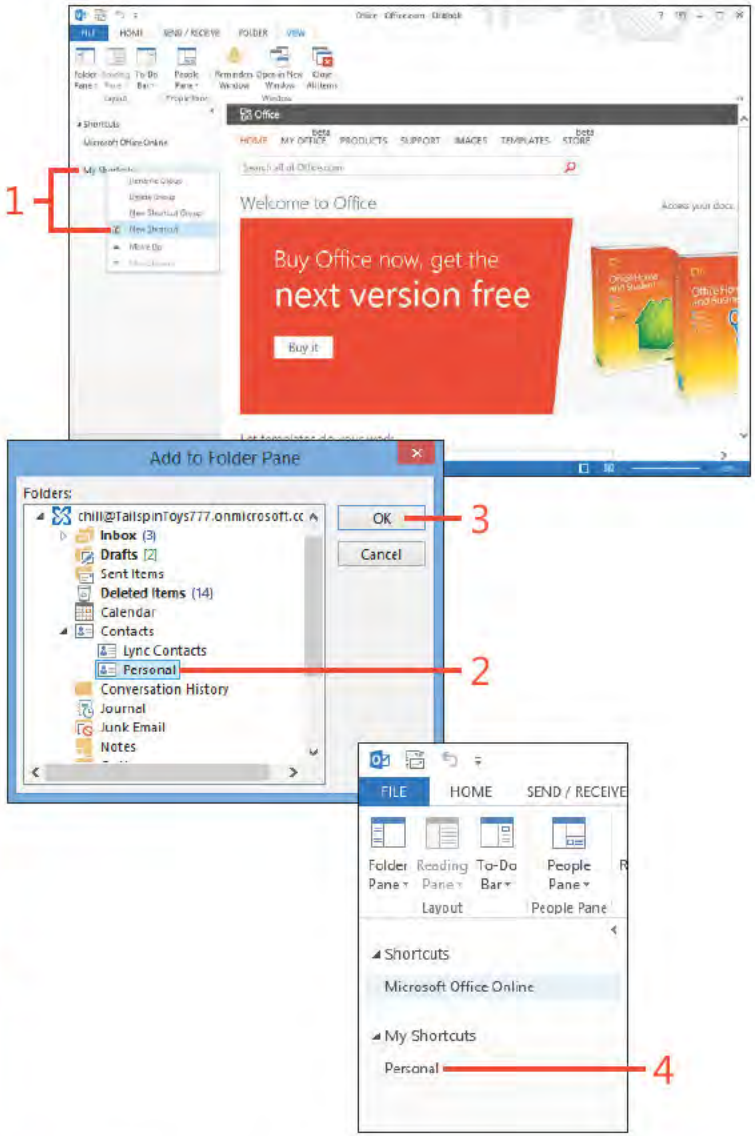
Add shortcuts to the Folder pane

1 On the Shortcuts page, r ght-c ck the target shortcut group and then, on the shortcuts menu that appears, c ck New Shortcut

2 In the Add To Fo der Pane d a og box, choose the Out ook fo der for wh ch you want to create a shortcut

3 C ck OK

4 Note the new shortcut n the se ected group



TIP To add shortcuts to your favorite websites and SharePoint sites in the Shortcuts list, just create a shortcut on the Windows desktop to the site and then drag the shortcut to the Shortcuts list in the Folder pane. You need to drop the shortcut icon exactly on the Shortcuts or on a group header for this to work correctly. These shortcuts open the website within Outlook.

TRY THIS You can add shortcuts for local file folders, network shares, and even documents and programs to the Outlook Shortcuts page in the Folder pane. Just drag the item to the Shortcuts group header (or other group header) to create the link to the item.

www.it-ebooks.info

Customizing the Outlook ribbon

The ribbon is used throughout the Outlook 2013 interface to provide quick access to commonly used commands and features. Although the ribbon gives you quick access to these items in a very organized way, you also have the ability to change it to suit your needs. For example, you might want to add your own tab of favorite commands so that you don't have to switch back and forth between tabs. You can also turn tabs on or off altogether.

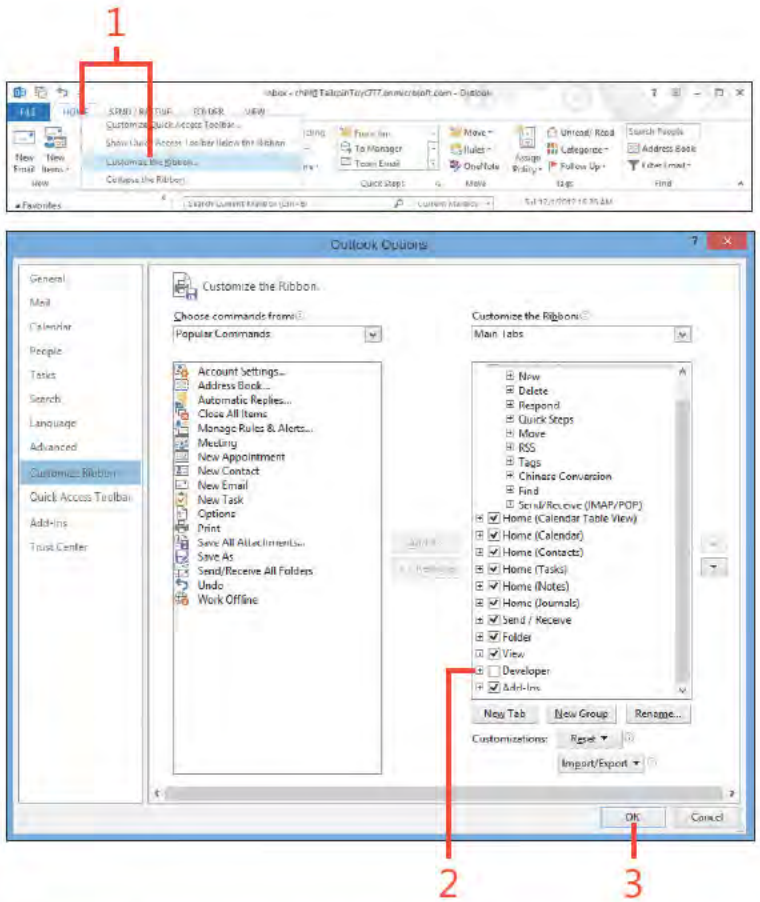
Turn tabs on or off

1 R ght-c ck any tab on the r bbon and then, on the shortcut menu that appears, c ck Custom ze The R bbon

2 In the Out ook Opt ons d a og box, scro down, and se ect the Deve oper tab check box

3 C ck OK

(continued on next page)

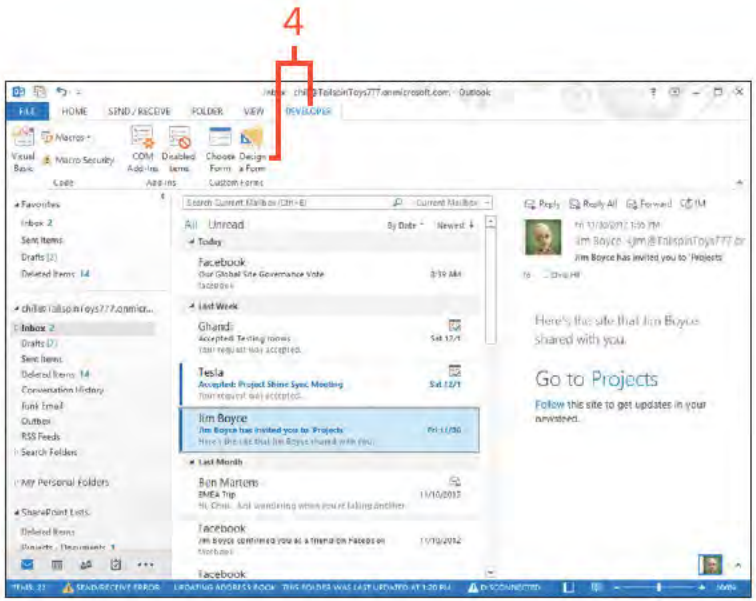


TIP Use the Import/Export command on the Outlook Options dialog box to export your customizations so that you can easily restore them (or share them with others). If you want to restore the ribbon to its original, default state, in the Outlook Options dialog box, click the Reset button to clear all customizations.

www.it-ebooks.info

Turn tabs on or off *(continued)*

4 The tab appears n the r bbon

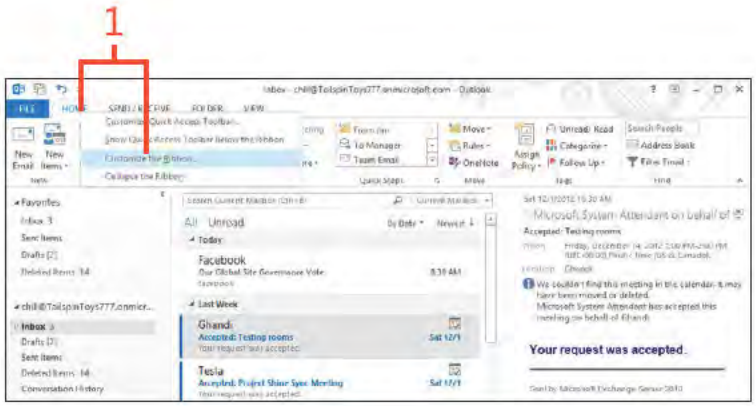


TRY THIS You can control the order in which the groups appear on a tab. To do so, select a group in the Outlook Options dialog box and then use the up and down arrows to the right of the group list to change the order in the list.

Add your own tab

1 R ght-c ck any tab on the r bbon and then, on the shortcut menu that appears, c ck Custom ze The R bbon

(continued on next page)



www.it-ebooks.info

Add your own tab *(continued)*

2 In the Out ook Opt ons d a og box, c ck New Tab

3 In the st box on the r ght, c ck the new y created tab

4 C ck Rename

5 In the Rename d a og box, type a new name

6 C ck OK

7 C ck New Group (created by defau t when you add the tab)

8 C ck Rename

9 Aga n, n the Rename d a og box that opens, type a name for the group

10 Choose an con for the group

11 C ck OK

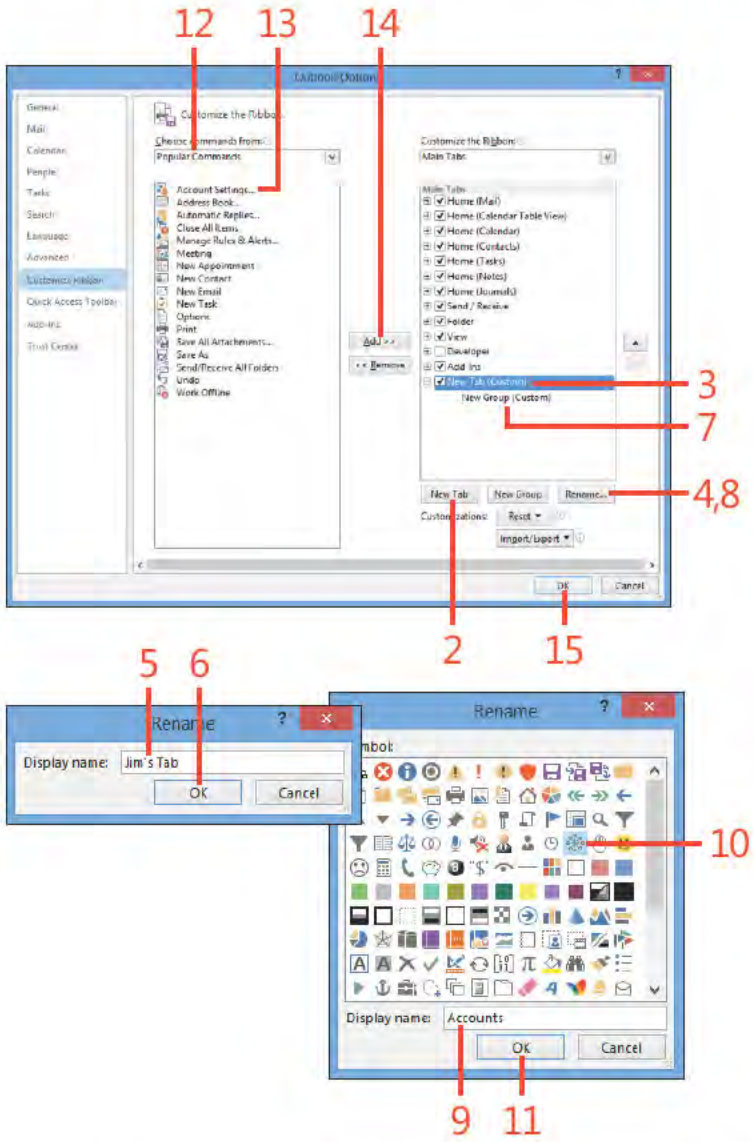
12 In the Choose Commands From st, choose a command group

13 Choose a command

14 C ck the Add button to add the command to the se ected group

15 Add other commands and groups as you prefer and then c ck OK

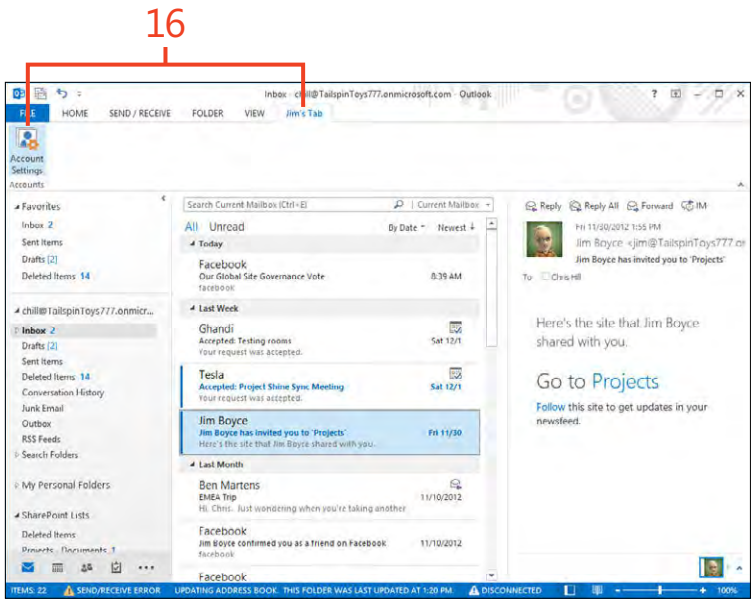
(continued on next page)



www.it-ebooks.info

Add your own tab *(continued)*

16 The new items appear in your custom tab



www.it-ebooks.info

Customizing the Quick Access Toolbar

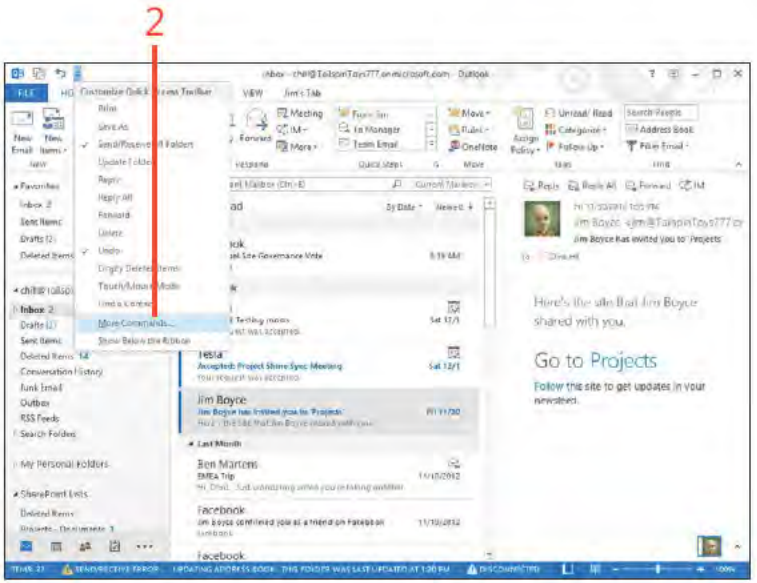
By default, the Quick Access Toolbar sits above the ribbon and provides quick access to frequently used commands and options. The Quick Access Toolbar takes up relatively little space, so it's unobtrusive. Although it already contains a handful of commands, you can add your own to suit your needs.

Add a command to the Quick Access Toolbar

1 On the r ght end of the Qu ck Access Too bar, c ck the Custom ze button

2 On the menu that appears, c ck More Commands

(continued on next page)



TIP The Quick Access Toolbar is a great place to add macros so that you can get to them quickly when you need them.

www.it-ebooks.info

Add a command to the Quick Access Toolbar *(continued)*

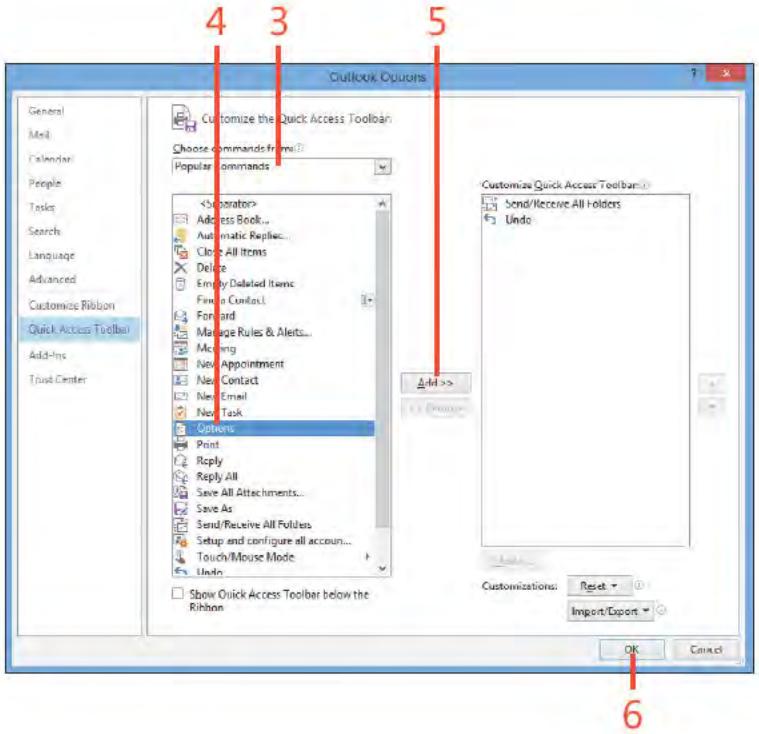
3 In the Out ook Opt ons d a og box, n the Choose Commands From st, choose a command group

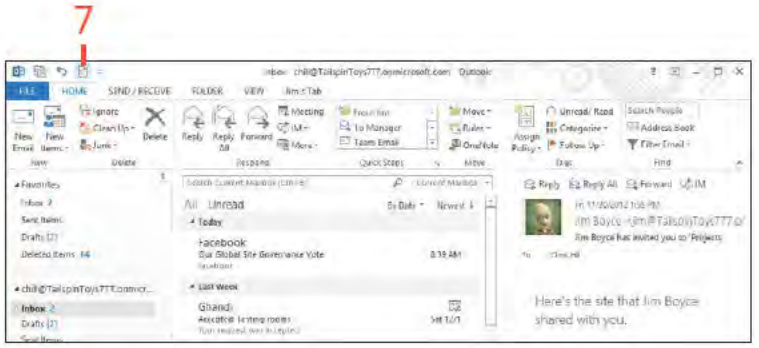
4 Choose the command you want to add

5 C ck Add

6 Opt ona y, add any other commands and c ck OK

7 The commands now appear on the Qu ck Access Too bar





TRY THIS You can move the Quick Access Toolbar below the ribbon if you prefer. Just click the Customize Quick Access Toolbar button and choose Show Below The Ribbon.

www.it-ebooks.info

Index

A

Account Sett ngs button, F e tab
  cached Exchange mode, 16, 230
  Mob e Not f cat ons, 178, 182, 184
  Out ook data f es, 228, 237
  Soc a Network Accounts, 92
Add Account button, F e tab, 27, 29
Address Book
  add ng contacts n, 105
  c os ng, 40
  Contacts fo der nc uded n, 40
  mu t p e address books n, 38
  open ng, 38
  search ng, 39
  se ect ng contact group members from, 41–42
  se ect ng ema rec p ents from, 36
  send ng ema from, 40
  v ew ng contacts n, 105
Address Book button, Home tab, 38
Advanced F nd d a og box, 111–112
a erts *See also* rem nders
  for Ca endar, sent to mob e phone, 182–183
  for ema , sent to mob e phone, 184–185
  for SharePo nt ca endars, 189
ann versar es for contacts, events for, 137
appo ntments
  add ng, 133–135
  attach ng f es to, 144–145
  Exce objects n, 149–150
  forward ng to others, 151–152
  nsert ng f e contents nto, 146–148
  nsert ng other tems nto, 142–143
  pr nt ng a , 153
  pr nt ng a spec f c appo ntment, 154–155
Arch ve Fo ders, 222
arch ves *See also* backups
  arch v ng tems, 222–223, 243
  AutoArch ve opt ons for, 241–242
  back ng up, 242
  recover ng tems from, 243
Attach F e button, Insert tab, 102, 144, 172
attachments
  to Ca endar tems, 144–145
  to ema
    add ng, 58–59
    nc uded n forwarded ema s, 77
    not nc uded n rep es, 76
    open ng, 74
    sav ng, 75
  to tasks, 172–173
aud o
  for Lync on ne meet ngs, 202
  vo ce ca s
    start ng from IM, 207
    start ng from Peop e Hub, 208–209
AutoArch ve feature
  opt ons for, sett ng, 241–242
  runn ng, 222–223
AutoD scover, sett ng up ema account us ng, 27–28

B

Backstage v ew, from F e tab
  Account Sett ngs button
    cached Exchange mode, 16, 230
    Mob e Not f cat ons, 178, 182, 184
    Out ook data f es, 228, 237
    Soc a Network Accounts, 92
  Add Account button, 27, 29
  C eanup Too s button, 222
  Ex t button, 22
  Open & Export button, 232, 235
  Opt ons button
    AutoArch ve, 241
    defau t ema format, 249
    ho days, 251
    workweek, 250
backups
  of arch ves, 242
  of PST f es, 237–238
  restor ng arch ves, 243
  restor ng PST f es, 239–240
b rthdays for contacts, events for, 137
Bus ness Card v ew, for contacts
  mapp ng contacts us ng, 113
  v ew ng contacts us ng, 104, 109

C

cached Exchange mode, 16–17, 230–231
Ca endar fo der
  a erts, sent to mob e phone, 182–183
  appo ntments n
    add ng, 133–135

www.it-ebooks.info

nsert ng other tems nto, 142–143
Date Nav gator for, 128–130
events n
add ng, 136
ann versar es as, 137
b rthdays as, 137
nsert ng other tems nto, 142–143
mod fy ng, 137
Exce objects n, 149–150
f es n
add ng as an attachment, 144–145
add ng contents of, 146–148
de et ng, 144
forward ng tems n, 151–152
ho days for, sett ng, 251–252
meet ngs n
add ng, 138–139
nsert ng other tems nto, 142–143
mod fy ng, 140
rem nders for, 149
reschedu ng, 140
Schedu ng Ass stant for, 138, 141
track ng responses to, 141
on ne meet ngs n
attendees, opt ons for, 203–204
aud o opt ons for, 202
creat ng, 200–201
jo n ng, 202
pr nt ng a tems n, 153
pr nt ng a spec f c tem n, 154–155
SharePo nt ca endars n
connect ng to Out ook, 188–189
mod fy ng, 190–191
Today opt on for, 128
To-Do Bar w th, 131–132
v ews of
Day v ew, 129
n Inbox, 12
Month v ew, 130
Weather bar n, 15
work hours for, sett ng, 250
workweek days, sett ng, 250–251
Card v ew, for contacts
add ng more f e ds to, 120–122
mapp ng contacts us ng, 113
v ew ng contacts us ng, 104, 109
categor es
add ng, 117, 214–215
ass gn ng to an tem, 212
for contacts, 117
de et ng, 214, 217
ed t ng, 117
mu t p e, ass gn ng to an tem, 212–213
renam ng, 216
for tasks, 163
Categor ze button, Home tab, 212, 213, 216
Categor zed Ma search fo der, 219
Cc ne, Message w ndow, 36
ce phone *See* mob e phone
Change V ew button, V ew tab, 32
C eanup Too s button, F e tab, 222
c ck ng method, se ect ng, 5
C ose button, 22
contact groups
creat ng, 41–42, 105
send ng ema to, 43
shar ng, 41
Contacts fo der *See also* Peop e Hub
add ng contacts
w th contact form, 98–99
from ema , 97
from soc a network ng accounts, 95–96
ann versar es for contacts, events for, 137
b rthdays for contacts, events for, 137
categor es n, 117
ed t ng contacts, 44
ema ng contacts, 123–124
favor te contacts, n To-Do Bar, 131–132
f es n contacts
add ng, 102–103
open ng, 103
remov ng, 102
fo ders n, user-def ned, 115–116
nc uded n Address Book, 40
nsert ng contacts nto Ca endar, 142–143
tems n contacts, 100–101
mapp ng contacts, 113–114
phon ng contacts, 125
presence of contacts for IMs, 205, 207
search ng contacts, 109–112
send ng IMs to contacts, 125–126
SharePo nt contacts n
add ng contacts to, 194–195
connect ng to Out ook, 192–193
copy ng Out ook contacts to, 195
soc a networks for contacts
act v t es, v ew ng, 107–108
connect ng to, 13–14
status, v ew ng, 106
v ews of
n Address Book, 105
Bus ness Card v ew, 104, 109, 113
Card v ew, 13–14, 32, 104, 109, 113, 120–122
choos ng, 104
f ter ng, 118–120
L st v ew, 104
Peop e v ew, 104, 109
Phone v ew, 32, 104

D

data f es
arch v ng tems to, 243
back ng up, 237–238
creat ng, 228–229

www.it-ebooks.info

on Exchange Server, 227, 230–231
export ng tems to, 235–236
mport ng tems from, 232–234
mov ng to another computer, 228, 234
open ng, 228
restor ng from backup, 239–240
types of, 227
Date Nav gator, 128–130
Day v ew, for ca endar, 129
De eted Items fo der, 70, 224
empty ng, 225
mov ng tems out of, 224
s ze of, check ng, 223
v ew ng, 224
de very rece pts, for ema , 246–247
d str but on groups *See* contact groups
document brar es, SharePo nt, 196–197
documents and f es
add ng to Shortcuts page, 258
n Ca endar
add ng as attachments, 144–145
add ng contents of, 146–148
de et ng, 144
n Contacts
add ng, 102–103
open ng, 103
remov ng, 102
sav ng ema attachments to, 75
sav ng ema to, 71–72
n Tasks
add ng as attachments, 172–173
add ng as hyper nks, 170, 172
v ruses n, check ng for, 75
doma n, b ock ng ema from, 80
Drafts fo der, 23, 62
mov ng ema to Outbox fo der, 64
v ew ng ema n, 63–64

E

e ps s ( ) button, fo der pane, 24
ema accounts
assoc at ng s gnatures w th, 52
retr ev ng ema from each separate y, 67
sett ng up
w th AutoD scover, 27–28
manua y, 29–30
ema messages *See also* Inbox fo der
a erts, sent to mob e phone, 184–185
Ca endar prev ew w th, 12
contacts from, add ng, 97
copy ng text n, 46
creat ng, 21
De eted Items fo der, 224
empty ng, 225
mov ng tems out of, 224
s ze of, check ng, 223
v ew ng, 224
de et ng, 8–9, 70
de very rece pts for, 246–247
drafts of
mov ng to Outbox fo der, 64
v ew ng, 63–64
ed t ng, 44–46
f e attachments to
add ng to an ema , 58–59
nc uded n forwarded ema s, 77
not nc uded n rep es, 76
open ng, 74
sav ng, 75
f ags for, sett ng, 8–9, 88–89
formatt ng, 37, 47–49, 248–249
forward ng, 10–11, 77
forward ng Ca endar tems n, 151–152
HTML n, add ng, 47, 248, 249
HTML stat onery for, 54–55
hyper nks n, enter ng, 48
IM, send ng from, 205–206
Inbox v ew for, 20
nsert ng nto Ca endar, 142–143
junk ema
add ng sender to junk ma f ter, 79–80
f ter ng, 78
remov ng sender from junk ma
f ter, 80
mark ng as read or unread, 8–9
mov ng text n, 46
Off ce themes for, 54
Outbox fo der, 220
p ctures, nsert ng n, 56–58
prev ew of, 25, 69
pr nt ng, 73
pr or ty (mportance) of, sett ng, 246
read ng, 68–69
read rece pts for, 246–247
rece v ng
automat ca y, 66
manua y, 61, 67
recover ng de eted ema , 70
rem nders for, sett ng, 88
rep y ng to, 10–11, 76
r ch text formatt ng n, 47
ru es for organ z ng
creat ng, 81–87
runn ng manua y, 83
sav ng to a f e, 71–72
send ng
automat ca y, 53, 60
to contacts, 123–124
manua y, 60–61
sent, v ew ng, 62
s gnatures for, 50–53
status of, cons for, 9
status report for tasks, send ng, 168–169
wr t ng, 36–37, 40

www.it-ebooks.info

events
add ng, 136
ann versar es as, 137
attach ng f es to, 144–145
b rthdays as, 137
Exce objects n, 149–150
forward ng to others, 151–152
nsert ng f e contents nto, 146–148
nsert ng other tems nto, 142–143
mod fy ng, 137
pr nt ng a , 153
pr nt ng a spec f c event, 154–155
Exce objects, n Ca endar, 149–150
Exchange Server
appo ntments v ewed by others, 135
cached Exchange mode w th, 16–17, 230–231
ca endar a erts us ng, 182–183
conf gur ng mob e phone w th, 178–181
ema not f cat ons us ng, 184–185
GAL (G oba Address L st) for, shar ng, 192
ocat on of Out ook data w th, 227
vers on requ rements for, 179
Ex t button, F e tab, 22
export ng
tems, 235–236
r bbon custom zat ons, 259

F

Facebook *See* soc a network ng accounts
f e attachments
to Ca endar tems, 144–145
to ema
add ng, 58–59
nc uded n forwarded ema s, 77
not nc uded n rep es, 76
open ng, 74
sav ng, 75
to tasks, 172–173
f e formats
for ema , 72
for Out ook data f es, 227
f es and documents
add ng to Shortcuts page, 258
n Ca endar
add ng as attachments, 144–145
add ng contents of, 146–148
de et ng, 144
n Contacts
add ng, 102–103
open ng, 103
remov ng, 102
document brar es, SharePo nt, 196–197
sav ng ema attachments to, 75
sav ng ema to, 71–72
n Tasks
add ng as attachments, 172–173
add ng as hyper nks, 170, 172
v ruses n, check ng for, 75
F e tab
Account Sett ngs button, 92, 178, 228, 237
cached Exchange mode, 16
Add Account button, 27, 29
C eanup Too s button, 222
Ex t button, 22
Open & Export button, 232, 235
Opt ons button, 33, 50, 52, 241
defau t ema format, 249
ho days, 251
workweek, 250
f ter ng
junk ema , 78–80
v ews, 118–120
f ags for ema , 8–9, 88–89
fo der pane, 23–24
co aps ng or h d ng, 20
custom z ng v ew of, 255
e ps s ( ) button, 24
Ma button, 23
mov ng fo ders on, 255
Peop e button, 95, 98
Shortcuts page, add ng, 256–258
show ng or h d ng, 253–254
Tasks button, 158, 160
fo ders
add ng to Shortcuts page, 258
Arch ve Fo ders, 222
arch v ng tems n, 222–223
Ca endar fo der *See* Ca endar fo der
Contacts fo der *See* Contacts fo der
creat ng, 220, 229
De eted Items fo der, 70, 224
empty ng, 225
mov ng tems out of, 224
s ze of, check ng, 223
v ew ng, 224
de et ng tems n, 224
Drafts fo der, 23, 62
mov ng ema to Outbox fo der, 64
v ew ng ema n, 63–64
Inbox fo der, 23, 68, 220
Ca endar prev ew n, 12
de et ng ema from, 70
new messages n, 68
number of messages n, 67
open ng, 23
recover ng de eted ema , 70
sort ng messages n, 68
unread messages n, 67
st of, v ew ng, 24
mov ng ema to automat ca y, 82
mov ng tems between, 220–221
Notes fo der, 8
Outbox fo der, 220
manua y send ng ema from, 61
mov ng ema from Drafts fo der to, 64

www.it-ebooks.info

search fo ders, 218–219
Sent Items fo der, 62
Tasks fo der *See* Tasks fo der
types of, 23
user-def ned
for contacts, 115–116
Fo der tab, New Fo der button, 115, 220
Format Text tab, 248
formatt ng
ema message, 37, 47–49, 248–249
IM (Instant Message), 205
Forward button, Home tab, 77

G

G oba Address L st (GAL), 192

H

He p, access ng, 34
ho days, sett ng, 251–252
Home tab
Address Book button, 38
Categor ze button, 212, 213, 216
Forward button, 77
Junk button, 78, 79, 80
New Appo ntment button, 133
New Ema button, 36, 43
New Items button, 41, 162
New Lync Meet ng button, 200
New Meet ng button, 138
New Task button, 162
Rep y button, 76
Ru es button, 81, 83
Work Week button, 136
HTML
nc ud ng n ema , 47, 248, 249
sav ng ema as, 72
HTML stat onery, 54–55
hyper nks
nc ud ng n ema , 48
nsert ng n tasks, 170, 172

I

Ca endar tems, forward ng, 152
mages, nsert ng n ema , 249
IM (Instant Message)
font for, sett ng, 205
nv t ng more peop e to, 206
presence of contacts for, 205, 207
send ng from ema message, 205–206
send ng from Peop e Hub, 207
send ng to contacts, 125–126
vo ce ca s from, 207
mportance (pr or ty), of ema , 246
mport ng tems, 232–234
Inbox fo der, 23, 68, 220 *See also* ema messages
Ca endar prev ew n, 12
de et ng ema from, 70
new messages n, 68
number of messages n, 67
open ng, 23
recover ng de eted ema , 70
sort ng messages n, 68
unread messages n, 67
Inbox v ew, 20
Insert tab
Attach F e button, 102, 144, 172
Out ook Item button, 100, 142
P cture button, 249
Instant Message *See* IM
Internet doma n, b ock ng ema from, 80
tems *See also* spec f c types of tems
arch v ng, 222–223, 243
categor es for
add ng, 214–215
ass gn ng to an tem, 212
de et ng, 214, 217
mu t p e, ass gn ng to an tem, 212–213
renam ng, 216
creat ng, 21
de et ng, 224
export ng, 235–236
mport ng, 232–234
nsert ng n Ca endar, 142–143
nsert ng n Contacts, 100–101
nsert ng n Tasks, 170–171
mov ng between fo ders, 220–221
recover ng from arch ves, 243
types of, 25
v ew ng contents of
n tem w ndow, 21, 26
n read ng pane, 25

J

Jo n Lync Meet ng button, Meet ng tab, 202
Journa feature, 8
Junk button, Home tab, 78, 79, 80
junk ema
add ng sender to junk ma f ter, 79–80
f ter ng, 78
remov ng sender from junk ma f ter, 80

K

keyboard shortcuts
c os ng programs, 22
copy ng and past ng text, 46
undo most recent act on, 221

L

L nkedIn *See* soc a network ng accounts
nks *See* hyper nks

www.it-ebooks.info

L st v ew, for contacts, 104
Lync
  IM (Instant Message)
    presence of contacts for, 205, 207
    start ng from ema , 205–206
    start ng from Peop e Hub, 207
    vo ce ca s from, 207
  on ne meet ngs
    attendees, opt ons for, 203–204
    aud o opt ons for, 202
    creat ng, 200–201
    jo n ng, 202
    sw tch ng other meet ngs to, 200
  v deo ca s, start ng, 209–210
  vo ce ca s, start ng, 208–209

M

Ma box C eanup too , 222–223
Ma button
  fo der pane, 23
  Opt ons d a og box, 50, 52
ma n w ndow *See* Out ook program w ndow
mapp ng contacts, 113–114
Meet ng Opt ons button, Meet ng tab, 203
meet ngs
  add ng, 138–139
  attach ng f es to, 144–145
  Exce objects n, 149–150
  forward ng to others, 151–152
  nsert ng f e contents nto, 146–148
  nsert ng other tems nto, 142–143
  mod fy ng, 140
  on ne meet ngs
    attendees, opt ons for, 203–204
    aud o opt ons for, 202
    creat ng, 200–201
    jo n ng, 202
  pr nt ng a , 153
  pr nt ng a spec f c meet ng, 154–155
  rem nders for, 149
  reschedu ng, 140
  Schedu ng Ass stant for, 138, 141
  sw tch ng to on ne meet ng, 200
  track ng responses to, 141
Meet ng tab
  Jo n Lync Meet ng button, 202
  Meet ng Opt ons button, 203
Message Prev ew, 25
Message Prev ew button, V ew tab, 25
messages *See* ema messages
Message w ndow, 36–37
M crosoft Exchange Server
  appo ntments v ewed by others, 135
  cached Exchange mode w th, 16–17, 230–231
  ca endar a erts us ng, 182–183
  conf gur ng mob e phone w th, 178–181
  ema not f cat ons us ng, 184–185
  GAL (G oba Address L st) for, shar ng, 192
  ocat on of Out ook data w th, 227
  vers on requ rements for, 179
M crosoft Lync
  IM (Instant Message)
    presence of contacts for, 205, 207
    start ng from ema , 205–206
    start ng from Peop e Hub, 207
    vo ce ca s from, 207
  on ne meet ngs, 200–204
    attendees, opt ons for, 203–204
    aud o opt ons for, 202
    creat ng, 200–201
    jo n ng, 202
    sw tch ng other meet ngs to, 200
  v deo ca s, start ng, 209–210
  vo ce ca s, start ng, 208–209
mob e a erts, 184–185
mob e phone
  ca endar a erts sent to, 182–183
  conf gur ng w th Exchange Server, 178–181
  ema not f cat ons sent to, 184–185
Month v ew, for ca endar, 130
mouse c ck ng method, se ect ng, 5
msg f e extens on, 72

N

Nav gat on Pane, 20
New Appo ntment button, Home tab, 133
New Ema button, Home tab, 21, 36, 43
new features n Out ook 2013, 8–18
  cached Exchange mode, 16–17
  Ca endar prev ew n Inbox, 12
  contacts, v ew ng n Peop e pane, 13–14
  ema messages
    ed t ng n read ng pane, 10–11
    f agg ng, mark ng, or de et ng, 8–9
  Weather bar, 15
New Fo der button, Fo der tab, 115, 220
New Items button, Home tab, 21, 162
New Lync Meet ng button, Home tab, 200
New Meet ng button, Home tab, 138
New Task button, Home tab, 162
Notes fo der, 8
not f cat ons *See* a erts; rem nders

O

Off ce themes, 54
off ne cache for Exchange, 16–17
Off ne He p, 34
off ne use of Out ook, 227
On ne He p, 34
on ne meet ngs
  attendees, opt ons for, 203–204
  aud o opt ons for, 202
  creat ng, 200–201

www.it-ebooks.info

jo n ng, 202
sw tch ng other meet ngs to, 200
Open & Export button, F e tab, 232, 235
Opt ons button, F e tab, 241
defau t ema format, 249
ho days, 251
workweek, 250
Opt ons d a og box
defau t v ew, sett ng, 33
export ng r bbon custom zat ons, 259
group order n tabs, chang ng, 260
Ma button, 50, 52
send ng messages mmed ate y, d sab ng, 60
weather d sp ay, 15
OST f es, 227
Outbox fo der, 220
manua y send ng ema from, 61
mov ng ema from Drafts fo der to, 64
Out ook
data f es for
arch v ng tems to, 243
back ng up, 237–238
creat ng, 228–229
on Exchange Server, 227, 230–231
export ng tems to, 235–236
mport ng tems from, 232–234
mov ng to another computer, 228, 234
open ng, 228
PST f es, 228–229
restor ng from backup, 239–240
types of, 227
deprecated features, 8
ex t ng, 22
He p for, access ng, 34
new features, 8–18
cached Exchange mode, 16–17
Ca endar prev ew n Inbox, 12
contacts, v ew ng n Peop e pane, 13–14
ema messages, f agg ng or
mark ng, 8–9
ema messages, n read ng
pane, 10–11
Weather bar, 15
off ne use of, 227
Qu ck Access too bar
add ng commands to, 263–264
mov ng be ow the r bbon, 264
r bbon
add ng tabs to, 260–262
export ng custom zat ons of, 259
mov ng groups n, 260
mov ng Qu ck Access too bar be ow, 264
turn ng tabs on or off, 259–260
start ng, 22
Out ook Item button, Insert tab, 100, 142
Out ook program w ndow, 20
Qu ck Access too bar n, 20
r bbon n, 20
tabs n, 20
v ews n *See* v ews
Out ook Today v ew, 23, 31

P

Peop e button, fo der pane, 95, 98
Peop e Hub *See also* Contacts fo der
contacts, v ew ng, 13–14
ema , send ng, 123–124
Favor tes, prev ew of, 12
IM, send ng, 207
soc a network ng accounts, us ng, 13–14
v deo ca s, start ng, 209–210
vo ce ca s, start ng, 208–209
Peop e v ew, for contacts, 104, 109
percent comp et on of tasks, 162, 163, 167
phone ca s *See* mob e phone; vo ce ca s
Phone v ew, for contacts, 32, 104
P cture button, Insert tab, 249
p ctures, nsert ng n ema , 56–58, 249
P a n Text formatt ng, 248
pr nt ng
appo ntments, 153, 154–155
ema , 73
events, 153, 154–155
meet ngs, 153, 154–155
pr or ty (mportance), of ema , 246
pr vacy of tasks, 163
program w ndow *See* Out ook program w ndow
Qu ck Access too bar n
add ng commands to, 263–264
mov ng be ow the r bbon, 264
r bbon n
add ng tabs to, 260–262
export ng custom zat ons of, 259
mov ng groups n, 260
mov ng Qu ck Access too bar be ow, 264
turn ng tabs on or off, 259–260
PST f es
arch v ng tems to, 243
back ng up, 237–238
creat ng, 228–229
export ng tems to, 235–236
mport ng tems from, 232–234
mov ng to another computer, 228
open ng, 228
restor ng from backup, 239–240

Q

Quest on Mark button, 34
Qu ck Access too bar, 20
add ng commands to, 263–264
mov ng be ow the r bbon, 264

www.it-ebooks.info

R

read ng pane, 25
  ed t ng ema n, 10–11
  newest or o dest message n, choos ng, 68
  open ng or c os ng, 69
  read ng ema n, 68–69
Read ng Pane button, V ew tab, 25
read rece pts, for ema , 246–247
recurr ng tasks, 164–166
rem nders *See also* a erts
  for ema , 88
  for meet ngs, 149
  for meet ngs, send ng to mob e phone, 183
  for tasks, 159, 163
Rep y button, Home tab, 76
restor ng PST f es, 239–240
r bbon n Out ook program w ndow, 20
  add ng tabs to, 260–262
  export ng custom zat ons of, 259
  mov ng groups n, 260
  mov ng Qu ck Access too bar be ow, 264
  turn ng tabs on or off, 259–260
r ch text formatt ng
  HTML stat onery for, 54–55
  nc ud ng n ema , 47, 248
Ru es button, Home tab, 81, 83
ru es for ema
  creat ng, 81–87
  runn ng manua y, 83

S

Schedu ng Ass stant, 138, 141
search fo ders, 218–219
search ng
  Address Book, 39
  contacts, 109–112
Se ect Names d a og box, 36
Send/Rece ve tab
  Send/Rece ve A Fo ders button, 67
  Send/Rece ve Groups button, 66
Sent Items fo der, v ew ng ema n, 62
SharePo nt *See* soc a network ng accounts
  ca endars n
    connect ng to Out ook, 188–189
    mod fy ng n Out ook, 190–191
  contacts n
    add ng contacts n Out ook, 194–195
    connect ng to Out ook, 192–193
  document brar es n, connect ng, 196–197
  SharePo nt s tes, add ng to Shortcuts page, 258
SharePo nt Workspace, 197
shortcut keys *See* keyboard shortcuts
Shortcuts page, n fo der pane, 256–258
s gnatures for ema , 50–53
  assoc at ng w th ema account, 52
  creat ng, 50–51
  nc ud ng n a new ema , 53
  nc ud ng n rep es or forwarded ema s, 52
S mp e L st v ew, for tasks, 160
Soc a Network Accounts, Account Sett ngs, 92
soc a network ng accounts
  add ng contacts from, 95–96
  add ng to Out ook, 92–94
  v ew ng contacts from, 96
    act v t es, 107–108
    network feeds and status, 106
spam *See* junk ema
stat onery, HTML *See* HTML stat onery
status of tasks, 162, 163
status report for tasks, 168–169
Subject ne, Message w ndow, 36, 37

T

tabs, n Out ook program w ndow, 20
Tasks button, fo der pane, 158, 160
Tasks fo der
  accept ng ass gned tasks, 176
  add ng tasks, 162–163
  ass gn ng tasks to others, 174–175
  category of tasks, 163
  creat ng tasks, 158
  de et ng tasks, 168
  nsert ng f es nto
    as attachments, 172–173
    as hyper nks, 170, 172
  nsert ng Out ook tems nto, 170–171
  mark ng tasks as comp ete, 160, 167
  Message Prev ew for, 25
  mod fy ng tasks, 159
  percent comp et on of tasks, 162, 163, 167
  pr vacy of tasks, 163
  recurr ng tasks, 164–166
  reject ng ass gned tasks, 176
  rem nders for tasks, 159, 163
  status of tasks, 162, 163
  status report for tasks, send ng, 168–169
  track ng tasks ass gned to others, 175
  v ew ng tasks, 158–159
    n S mp e L st v ew, 160
    n Today v ew, 161
    n To-Do Bar, 131–132, 161
themes *See* Off ce themes
Today opt on, for ca endar, 128
Today v ew, for tasks, 161
To-Do Bar, 131–132, 161
To-Do Bar button, V ew tab, 161
To ne, Message w ndow, 36
touchscreen, us ng, 5

www.it-ebooks.info

U

Unread Ma search fo der, 219

V

vers on 2013 of Out ook, new features, 8–18
  cached Exchange mode, 16–17
  Ca endar prev ew n Inbox, 12
  contacts, v ew ng n Peop e pane, 13–14
  ema messages
    ed t ng n read ng pane, 10–11
    f agg ng, mark ng, or de et ng, 8–9
  Weather bar, 15
v deo ca s, start ng, 209–210
v ews
  Bus ness Card v ew, for contacts, 104, 109, 113
  Card v ew, for contacts, 32, 104, 109, 113
    add ng more f e ds to, 120–122
  chang ng, 32
  custom, creat ng, 120–122
  Day v ew, for ca endar, 129
  defau t v ew, sett ng, 33
  f ter ng, 118–120
  Inbox v ew, for ema , 20
  L st v ew, for contacts, 104
  Month v ew, for ca endar, 130
  Out ook Today v ew, 23, 31
  Peop e v ew, for contacts, 104, 109
  Phone v ew, for contacts, 32, 104
  S mp e L st v ew, for tasks, 160
  Today v ew, for tasks, 161
V ew Sett ngs button, V ew tab, 118
V ew tab
  Change V ew button, 32
  Message Prev ew button, 25
  Read ng Pane button, 25
  To-Do Bar button, 161
  V ew Sett ngs button, 118
v ruses n ema attachments, check ng for, 75
vo ce ca s
  for Lync on ne meet ngs, 202
  start ng from IM, 207
  start ng from Peop e Hub, 125–126, 208–209

W

Weather bar, 15
webs tes
  nks to, n ema , 48
  n Shortcuts page, 258
w ndows
  tem w ndows, 21, 26
  Message w ndow, 36–37
  Out ook program w ndow
    Qu ck Access too bar n, 263–264
    r bbon n, 259–262
work hours, sett ng, 250
Work Week button, Home tab, 136
workweek days, sett ng, 250–251

www.it-ebooks.info

www.it-ebooks.info