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Microsoft Outlook 2013

Level 1

Quick Reference

Course Code: INF1325

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# Chapter 2: Getting Started With Outlook

## To Start Outlook in Windows 8:

* Display the ***All apps*** screen and click on ***Outlook 2013***, or
* Type **outlook** in the ***Windows Start*** screen and click on ***Outlook 2013*** under ***Results***, or
* Click on the ***Outlook 2013*** tile on the ***Windows Start*** screen

## To Use the Ribbon:

1. Click on a ***tab*** to display the ***commands***

2. Click on a ***tool*** to activate a ***command***, display a ***gallery*** or display a ***dialog box***

## To Use KeyTips to Access Commands:

1. Press  to display the ***KeyTips***

2. Press the letter key of the command or tab that you want to select

3. Press ** to return to normal mode

## To Hide/Display the Ribbon:

1. Click on ***Ribbon Display Options*** in the top right corner of the window

2. Select the desired mode

## To Access the Backstage View:

1. Click on the ***FILE*** tab

2. Click on the desired tab in the blue panel to display the options

## To Customise the Quick Access Toolbar:

1. Right-click on the command in the ribbon that you want to add and select **Add to Quick Access Toolbar**, or

Click on ***Customise Quick Access Toolbar*** and select a command

## To Navigate to Outlook Features:

1. Click on the desired label in the ***Navigation*** bar

## To Display a Peek:

1. Point to the desired label in the ***Navigation*** bar

To ***dock*** a ***peek***:

1. Display the peek

2. Click on the ***Dock the peek*** icon

## To Work With the Folder Pane:

* Click on the ***Expand the Folder Pane*** arrow to open the ***Folder*** pane
* Click on **[All Folders]** or a **[Favourite Folder]** in the minimised ***Folder*** pane to temporarily expand the pane

## To Display the To-Do Bar:

1. Click on the ***VIEW*** tab

2. Click on ***To-Do Bar*** in the ***Layout*** group

3. Select the desired options

## To Exit Outlook:

1. Click on the ***FILE*** tab and click on ***Exit***, or

Click on ***Close*** in the top right corner of the window

# Chapter 3: Sending Email

## To Create a New Message:

1. Click on the ***HOME*** tab, then click on ***New Email*** in the ***New*** group

2. Click on **[To]**, select the name and then click on **[OK]**

3. Type the ***Subject***

4. Type the message

## To Check the Spelling in a Message:

1. Click on the ***REVIEW*** tab
2. Click on ***Spelling & Grammar*** in the ***Proofing*** group

## To Add an Attachment to a Message:

1. Click on the ***MESSAGE*** tab, then click on ***Attach File*** in the ***Include*** group

2. Navigate to the desired folder

3. Click on the file

4. Click on **[Insert]**

## To Change the Importance of a Message:

1. Click on the ***MESSAGE*** tab, then click on ***High Importance*** in the ***Tags*** group

2. Click on the ***dialog box launcher*** icon for ***Tags***

3. Set ***Sensitivity*** as desired and click on **[Close]**

## To Request a Message Receipt:

1. Click on the ***OPTIONS*** tab

2. Tick ***Request a Delivery*** in the ***Tracking*** group to request a ***delivery*** ***receipt***, or

Tick ***Request a Read Receipt*** in the ***Tracking*** group to request a ***read receipt***

## To Send a Message:

1. Click on **[Send]** in the message header

## To Create an AutoSignature:

1. Create a new email message

2. On the ***MESSAGE*** tab, click on ***Signature*** in the ***Include*** group and select **Signatures**

3. Click on **[New]** and name your signature

4. Type and format your signature text in ***Edit signature***, and then click on **[OK]**

## To Use an AutoSignature:

1. Create a new email message – the AutoSignature will appear automatically

## To Remove an AutoSignature:

1. Create a new email message

2. On the ***MESSAGE*** tab, click on ***Signature*** in the ***Include*** group and select **Signatures**

3. Select the signature and click on **[Delete]**

4. Click on **[OK]**

## To Send a Courtesy Copy:

1. Create a new message, then click on **[To]**

2. Select the recipient and click on **[To]**

3. Select the recipient for the courtesy copy and click on **[Cc]**

4. Click on **[OK]** and then click on **[Send]**

## To Send a Blind Copy of an Email:

1. Create a new message

2. Click on the ***OPTIONS*** tab, then click on ***Bcc*** in the ***Show Fields*** group

3. Type the blind copy recipient in ***Bcc***

# Chapter 4: Receiving Email

## To Manually Retrieve Email:

1. Open the ***Mail*** feature

2. Click on the ***SEND / RECEIVE*** tab

3. Click on ***Send/Receive*** *All Folders* in the ***Send & Receive*** group

## To Open a Data File in Outlook:

1. Click on the ***FILE*** tab to open the ***Backstage***

2. Click on ***Open & Export***

3. Click on ***Open Outlook Data File***

4. Select the data file and click on **[OK]**

## To Adjust the View of a Specific Mail Folder:

1. Click on the folder in the ***Folder*** pane, then click on the ***VIEW*** tab

2. Adjust ***Change View*** in the ***Current View*** group as desired

3. Display, minimise or close panes as needed

## To Preview Messages:

1. Click on the ***VIEW*** tab

2. Click on ***Message*** ***Preview*** in the ***Arrangement*** group

3. Select the desired option

## To Arrange Messages:

1. Click on ***All*** or ***Unread*** in the message list

2. Click on the drop arrow to the right of ***By Date*** and select the desired option, or

Click on the ***VIEW*** tab, then click on ***Arrange By*** in the ***Arrangement*** group and select the desired option

## To Read Messages:

1. Click on the message to display it in the ***Reading*** pane (if it is open), or

Double-click on the message to open it in its own window

## To Open Several Messages:

1. Click on a message, press and hold down  and click on other messages as desired

2. Right-click on one of the selected messages and select **Open**

## To Navigate Messages in a Conversation:

1. Click on the ***VIEW*** tab, click on ***Show as Conversations*** in the ***Messages*** group, then click on **[This folder]**

2. ***Expand***  the conversation and click on the desired message to view it in the ***Reading*** pane, then collapse  the conversation

## To Reply to a Message Using Inline Replies:

1. Select the message in the message list

2. Click on ***Reply*** in the ***Reading*** pane or in the ***Respond*** group on the ***HOME*** tab

3. Type your response

4. Click on **[Send]**

## To Reply to a Message in a Conversation:

1. Expand the conversation

2. Select or open the message to which you want to respond

3. Click on ***Reply*** in the ***Reading*** pane or in the ***Respond*** group on the ***HOME*** tab

## To Reply to All Recipients of a Message:

1. Select or open the message

2. Click on ***Reply All*** in the ***Reading*** pane or in the ***Respond*** group on the ***HOME*** tab

3. Type your response

4. Click on **[Send]**

## To Ensure Replies Don’t Include the Original Message Text:

1. Click on the ***FILE*** tab and click on ***Options***

2. Click on ***Mail***

3. Change ***When replying to a message*** to ***Do not include original message***

## To Add Comments to Replies:

1. Click on the ***FILE*** tab and click on ***Options***

2. Click on the ***Mail*** category, click on ***Preface comments with*** and then type your name or other text as desired

3. Click on **[OK]**

## To Direct Replies to Another Email Address:

1. Create a new blank message

2. Click on the ***OPTIONS*** tab, then click on ***Direct Replies To*** in the ***More Options*** group

3. Tick ***Have replies sent to***

4. Type the new email address

## To Forward a Message:

1. Select the message in the message list

2. Click on ***Forward*** in the ***Reading*** pane or in the ***Respond*** group on the ***HOME*** tab

3. Nominate the recipient, type a response and click on **[Send]**

## To View Related Messages:

1. Right-click on the message

2. Select **Find Related**> **Messages in this Conversation** or **Messages from Sender**

## To Ignore a Conversation:

1. Click on the conversation

2. Click on the ***HOME*** tab, then click on ***Ignore*** in the ***Delete*** group

3. Click on **[Ignore Conversation]**

## To Mark Messages as Unread:

1. Point to the message in the message list

2. Click on the blue vertical bar that appears to the left of the message

# Chapter 5: Working With Attachments

## To Add a File Attachment to a Message:

1. On the ***MESSAGE*** tab, click on ***Attach File*** in the ***Include*** group

2. Navigate to the desired folder

3. Click on the file

4. Click on **[Insert]**

## To Add an Item Attachment to a Message:

1. On the ***MESSAGE*** tab, click on ***Attach Item*** in the ***Include*** group

2. Select the appropriate option

3. Specify the desired settings

## To Preview Attachments:

1. Click on the message with the attachment/s to view it in the ***Reading*** pane, or

Double-click on the message to open it

2. Click on the attachment in the header

## To Save File Attachments:

1. Select the message in the message list

2. Click on the ***FILE*** tab, click on the ***Save Attachments*** tab, select the files and click on **[OK]**

3. Select the folder location and click on **[OK]**

## To Open a File Attachment:

1. Click on the message with the attachment to open it in the ***Reading*** pane, or

Double-click on the message to open it

2. Double-click on the file attachment

3. Click on **[Open]** if necessary

# Chapter 6: Flagging Messages

## To Flag a Message in the Message List:

1. Click on the message in the message list

2. Click on the ***HOME*** tab, then click on ***Follow Up*** in the ***Tags*** group

3. Select the desired option

## To Send a Flagged Message:

1. Create a new message

2. On the ***MESSAGE*** tab, click on ***Follow Up*** in the ***Tags*** group

3. Select **Custom**

4. Tick ***Flag for Recipients*** and set the options

## To Add a Reminder to Your Messages:

1. Click on the message in a message list

2. On the ***HOME*** tab, click on ***Follow Up*** in the ***Tags*** group and select **Add Reminder**

3. Tick ***Reminder*** and change the ***Reminder*** date and time as desired

4. Click on **[OK]**

## To Change the Default Quick Click Flag:

1. Point to a message in a message list, then right-click on the Quick Click flag

2. Select **Set Quick Click**

3. Select the desired option and click on **[OK]**

## To Remove a Flag:

1. Click on the message in a message list

2. Click on the ***HOME*** tab, then click on ***Follow Up*** in the ***Tags*** group

3. Select **Clear Flag**, or

Select **Mark Complete**

# Chapter 7: Junk Email

## To Add a Sender to the Blocked Senders List:

1. Select the message in a message list

2. On the ***HOME*** tab, click on ***Junk*** in the ***Delete*** group

3. Select **Block Sender**

## To Add Senders to the Safe Senders List:

1. Select the message in a message list

2. On the ***HOME*** tab, click on ***Junk*** in the ***Delete*** group

3. Select **Never Block Sender**, or

Select **Never Block Sender’s Domain**

## To Work With the Senders Lists:

1. Click on the ***HOME*** tab, then click on ***Junk*** in the ***Delete*** group and select **Junk E‑mail Options**

2. Click on either the ***Blocked Senders*** tab or the ***Safe Senders*** tab

3. Make the desired changes

## To Import a Blocked Senders List:

1. Click on ***Junk*** in the ***Delete*** group and select **Junk E‑mail Options**

2. Click on the ***Blocked Senders*** tab

3. Click on **[Import from File]**

4. Double-click on the file, then click on **[OK]**

## To Export a Blocked Senders List:

1. Click on ***Junk*** in the ***Delete*** group and select **Junk E‑mail Options**

2. Click on the ***Blocked Senders*** tab

3. Click on **[Export to File]**

4. Name the file and click on **[Save]**

## To Delete Messages in the Junk E‑mail Folder:

1. Click on the ***Junk E‑mail*** folder

2. Select the messages to be deleted

3. Press  to move them to the ***Deleted Items*** folder, or

Press  +  to permanently delete them

# Chapter 8: Working With the Calendar

## To Access the Calendar:

1. Click on ***Calendar*** in the ***Navigation*** bar, or

Press  + 

## To Change the Number of Days Displayed in the Calendar:

1. Click on the ***HOME*** or ***VIEW*** tab

2. In the ***Arrange*** group, click on ***Day*** to display a single day, ***Work Week*** to display the working week or ***Month*** to display the month

## To Display a Specific Date in the Calendar:

1. Click on a date in the ***Date Navigator*** in the ***Folder*** pane, or

Press  + , type the desired ***Date***, select the appropriate arrangement type in ***Show in*** and click on **[OK]**

## To Navigate Within a Calendar:

1. Arrange the calendar as desired: **Day**, **Week** or ***Month*** etc

2. Click on the ***Forward*** and ***Back*** arrows to move forwards and backwards, or

Click on the ***Previous*** ***Appointment*** or ***Next Appointment*** tab (if available)

## To Change the Current View of the Calendar:

1. Click onthe ***VIEW*** tab, then click on ***Change View*** in the ***Current View*** group

2. Select the desired option

## To Create a Second Time Zone:

1. Click on the ***FILE*** tab, click on ***Options***, then click on the ***Calendar*** category

2. Tick ***Show a second time zone***

3. Select the new ***Time zone*** and type the ***Labels***

## To Remove a Time Zone:

1. Click on the ***FILE*** tab, click on ***Options***, then click on the ***Calendar*** category

2. Remove the tick from ***Show a second time zone***

3. Click on **[OK]**

## To Create a New Calendar:

1. Click on the ***FOLDER*** tab, then click on ***New Calendar*** in the ***New*** group

2. Type the ***Name***

3. Click on the desired folder in ***Select where to place the folder***, then click on **[OK]**

## To Overlay Multiple Calendars:

1. Display the desired calendars

2. Click on the ***View in Overlay Mode*** arrow at the top left of the desired calendar tabs

## To Delete a Calendar:

1. Ensure that only the calendar to be deleted is selected in the ***Folder*** pane

2. Click on the ***FOLDER*** tab, then click on ***Delete Calendar*** in the ***Actions*** group

3. Click on **[Yes]**

# Chapter 9: People

## To Access and View Your Contacts:

1. Click on ***People*** in the ***Navigation*** bar

2. Select the contact folder in the ***Folder*** pane, if necessary

3. Click on the ***HOME*** tab, then click on the desired option in the ***Current View*** group

## To Create a New Contact:

1. Click on ***People*** in the ***Navigation*** bar

2. On the ***HOME*** tab, click on ***New******Contact*** in the ***New*** group, or

Press  + 

## To Enter Details Into a New Contact Form:

1. Click in the desired fields in the ***Contact*** form and type the appropriate information

2. Click on ***Save & Close***

## To Edit Contact Details:

1. Display the required people card in the ***Preview*** pane

2. Click on ***Edit…***

3. Make the desired changes

4. Click on **[Save]**

## To Insert Contact Picture:

1. Display the relevant ***Contact*** form

2. On the ***CONTACT*** tab, click on ***Picture*** in the ***Options*** group and select **Add Picture**

3. Select the image and click on **[OK]**

4. Click on ***Save & Close*** in the ***Actions*** group

## To Add a New Contact for an Existing Company:

1. Display the ***Contact*** form for someone from the same company

2. Click on ***Save & New*** and select **Contact from the Same Company**

3. Enter the details and click on ***Save & Close***

## To Print the Contact Listing:

1. Select the required option in the ***Current View*** group

2. Click on the ***FILE*** tab and click on ***Print***

3. Select the desired options

4. Click on **[Print]**

## To Delete a Contact:

1. Click on the contact to select it

2. On the ***HOME*** tab, click on ***Delete*** in the ***Delete*** group

## To Recover a Deleted Contact:

1. Select the record in the ***Deleted Items*** folder

2. Click on ***Move*** in the ***Move*** group and select **Other Folder**

3. Select the destination folder

4. Click on **[OK]**

# Chapter 10: Tasks

## To Create a Task:

1. Click on ***New Task*** in the ***New*** group, enter the relevant details and click on ***Save & Close***, or

Click on ***Click here to add a new Task***, enter the relevant details and press 

## To Change Task Views:

1. Click on the ***VIEW*** tab

2. Click on ***Change View*** in the ***Current View*** group

3. Select the desired option

## To Sort a Task List:

1. Click on the heading in the list of tasks to sort in ascending order

2. Click on the heading again to sort in descending order

## To Edit a Task:

1. Double-click on a task, make the desired changes and click on ***Save & Close*** in the ***Actions*** group

To ***mark*** a ***task*** as ***completed***:

1. Click on the box to the left of the task so it appears ticked

## To Delete a Task:

1. Click on the task to select it

2. On the ***HOME*** tab, click on ***Delete*** in the ***Delete*** group

## To Print a Task List:

1. Display the list of tasks

2. Sort the data if required

3. Click on the ***FILE*** tab, then click on ***Print***

4. Click on **[Print]**