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Microsoft Outlook 2013

Level 1

Handy Tips

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# Chapter 2: Getting Started With Outlook

## Starting Outlook in Windows 8

* You can add an ***Outlook*** tile to the ***Start*** screen by right-clicking on ***Outlook 2013*** on the ***Apps*** screen and clicking on ***Pin to Start***. You can also add an Outlook icon to the taskbar in the desktop by right-clicking on ***Outlook 2013*** on the ***Apps*** screen and clicking on ***Pin to taskbar***.

## Using the Ribbon

* Additional tabs known as ***contextual tabs*** appear in specific circumstances. For example, if you click on ***Reply*** to create a reply to a message, the ***COMPOSE TOOLS: MESSAGE*** tab will appear. This provides quick access to all of the tools you may need while composing the reply message.

## Using Ribbon KeyTips

* You can use the shortcut keys for menu commands that were available in previous versions of Office. For example,  +  applies bold to selected text in an email message.

## Showing and Collapsing the Ribbon

* If you wish to quickly collapse the ribbon to display only the tab names, you can click on *Collapse the Ribbon*, located in the top right corner of the ribbon or press  + . You can quickly expand it again by double-clicking on a tab or pressing  + .

## Accessing the Backstage View

* You can close the ***Backstage*** by pressing **.

## Adding Commands to the QAT

* You can position the ***QAT*** under the ribbon by clicking on ***Customise Quick Access Toolbar*** and selecting **Show Below the Ribbon**. This places the tools that you use most frequently closer to your Outlook item making it quicker to access them.

## Navigating to Outlook Features

* You can use the ***Navigation Options*** dialog box to display additional items in the ***Navigation*** bar. You can also use this dialog box to change the number of items that display in the ***Navigation*** bar and the order in which they display.

## Sneaking a Peek

* When a peek is docked or undocked, it only affects that view, e.g., docking a peek in Mail will not dock it in People.
* Docking a peek is the same as displaying the ***To-Do*** bar via the ***VIEW*** tab. Since there is no Mail ***To-Do*** bar, a peek will not appear when you point to Mail in the ***Navigation*** bar.

## The Folder Pane

* If you have dragged folders into the ***Favourite Folders*** area at the top of the ***Folder*** pane, labels for your favourite folders will appear in the minimised ***Folder*** pane enabling you quick access to them.
* You can hide the ***Folder*** pane by clicking on ***Folder Pane*** (***VIEW*** tab) and selecting **Off**.

## The To-Do Bar

* You can close individual components or peeks, such as tasks or calendar, in the ***To‑Do*** bar. To do this, click on the ***Remove the peek*** button in the top right corner of the unwanted component in the ***To-Do*** bar.

## Exiting Outlook

* Since ***Mail*** and accessing ***Contacts*** is almost an integral part of working with your computer, it is better to keep Outlook minimised rather than close it.
* You can close Outlook by double‑clicking on the small blue Outlook icon () to the left of the ***Quick Access Toolbar***.

# Chapter 3: Sending Email

## Creating a New Message

* You can create a new mail message from any Outlook feature by clicking on ***New Items*** in the ***New*** group on the ***HOME*** tab and selecting **Email Message**.
* If you click in ***To*** and begin typing the recipient’s email address, Outlook will use AutoComplete to display relevant addresses.

## Checking the Spelling

* Because email messages are often written and sent off quickly, they tend to lack the formality and protocol of a postal message. Nevertheless, you should ensure the spelling is correct before sending the message.

## Adding an Attachment to a Message

* If you mention words like ***attachment*** or ***attached*** in the body of a message and then send the message without attaching a file, the attachment reminder ***MailTip*** will display asking whether you’ve forgotten to attach a file. Although you can choose to not display this message, we don’t recommend it!

## Adding Importance

* ***Sensitivity*** options in the ***Properties*** dialog box are only advisory – they do not force what action the recipient takes.
* Don’t overuse the ***High Importance*** flag. Too much use of this and your recipients will begin to ignore your messages!

## Requesting Message Receipts

* While read and delivery receipts are useful, they do not guarantee that the person to whom the message was sent was the person who actually opened it and read it. Sometimes, formally requesting a reply from the recipient is a better option.

## Sending the Message

* Once a mail message has been sent, it is placed in the ***Sent Items*** folder. From this folder you can resend the message which can be handy if you forgot to add an attachment to the message, or you can send it to another recipient altogether.

## Creating an AutoSignature

* Formatting options can be applied to an AutoSignature if you use plain text as your message format. The formatting will not be visible in your outgoing messages, but it will be visible to recipients who use HTML or .rtf message formats.

## Using an AutoSignature

* Although you can create more than one AutoSignature, only one AutoSignature will be set as the default. If you want to insert a different AutoSignature, click on the ***MESSAGE*** tab, click on ***Signature*** and select the desired signature from the list of signatures.

## Removing an AutoSignature

* You can access the ***Signatures and Stationery*** dialog box from a new message by clicking on ***Signature*** in the ***Include*** group on either the ***MESSAGE*** or ***INSERT*** tab.

## Sending a Courtesy Copy

* When you are creating a new email message, you can open the ***Select Names*** dialog box by clicking on either **[To]** or **[Cc]** in the new message window.

## Sending a Blind Copy

* You can add a blind copy recipient by clicking on **[To]** or **[Cc]** in the header area of a message. You can then add recipient names to ***Bcc*** in the ***Select Names*** dialog box. When you close this dialog box, the ***Bcc*** field will appear in the header of the email.

# Chapter 4: Receiving Email

## Retrieving Email

* You can quickly retrieve and send email by clicking on the ***Send/Receive*** *All Folders* tool in the ***Quick Access toolbar*** or by pressing .

## Opening an Outlook Data File

* When you open a second Outlook data file you will have access to two ***Inboxes***. However, Outlook will still deliver all incoming mail to the default ***Inbox*** designated for receiving mail – this is usually the one associated with your personal data file.

## Adjusting the Message View

* The default view for each folder in Mail (***Inbox***, ***Sent Items***, etc) is ***Compact*** viewwith ***Message Preview*** set to ***1 Line***.
* Most email viruses can’t spread unless you open the message. Now, however, some viruses can spread via the ***Reading*** pane. This makes ***Preview*** view a good option.

## Previewing Messages

* If space is an issue, you might find it best to turn off ***AutoPreview*** altogether.

## Arranging Messages

* If ***Show in Groups*** is not ticked, the messages will simply be listed in order by the sorting criteria, such as by sender. When ***Show in Groups*** is ticked, Outlook will group each category under an appropriate group heading.

## Reading Messages

* You can set up Outlook so that when you read a message in the ***Reading*** pane, the bolding disappears from the message in the message list when you click on another message. Click on ***Reading Pane*** (***VIEW*** tab), select **Options** and tick ***Mark items as read when viewed in the Reading Pane***.

## Opening Several Messages

* You can use a keyboard shortcut to open several selected messages. The keyboard shortcut is  + .
* If you have opened several messages, you can close them in one go by returning to the ***Inbox***, clicking on the ***VIEW*** tab and clicking on ***Close All Items*** in the ***Windows*** group.

## Navigating Messages in a Conversation

* If you happen to receive a message from someone that has the identical subject to other unrelated messages that you’ve sent and/or received, Outlook will group them together as one conversation.

## Replying to a Message

* If the ***Reading*** pane isn’t open in your Mail view, clicking on ***Reply*** in the ***Respond*** group on the ***HOME*** tab will open the reply message in a new window.
* When you reply to a message that includes attachments, the attachments will not be sent back to the sender with the reply.

## Replying to a Message in a Conversation

* If a conversation has split into two or more conversations, you must click on the part of the conversation to which you want to reply and the response will be sent to the latest message in that split.

## Replying to All Messages

* If you click on ***Reply All*** to a large recipient list, Outlook will display a mail tip checking whether you really want to reply to all recipients or only the initiator.

## Replying Without the Original Message

* The ***Mail*** category in the ***Options*** dialog box has a number of options that allow you to configure how your email will work. These are worthy of further exploration.

## Adding Comments to Replies

* You can add inline comments to reply messages without adding your name to the ***Preface comments with*** option simply by typing them. However, your comments will be easier to see in the reply message if you do utilise this option.

## Getting Replies Sent to Another Address

* The ***Properties*** dialog box includes an option to delay sending a message until after a specified time (***Do not deliver before***), and an option to give a message a use by date (***Expires after***). Note that an expired message will still appear in your ***Inbox*** but its ***Subject*** will display in strikethrough.

## Forwarding Messages

* You can forward a conversation in the same way as other messages. Click on the desired message in the conversation and click on ***Forward***.
* Unlike replies, attachments are forwarded with a forwarded message.

## Finding Related Messages

* You can further refine the search results using the various commands on the ***SEARCH TOOLS: SEARCH*** tab.
* If you have opened a message by double-clicking on it in the message list, you can findrelated messages by clicking on ***Related*** in the ***Editing*** group on the ***MESSAGE*** tab.

## Ignoring Conversations

* You can reduce the size of a conversation by clicking on ***Clean Up*** in the ***Delete*** group. This function will delete all redundant messages in a conversation (messages that are not flagged or categorised, plus read messages except for the newest message in each branch of the conversation).

## Marking Messages as Unread

* When you point to a message in the message list, a ***delete*** icon will appear to the right of the message making it very quick to delete the message.

# Chapter 5: Working With Attachments

## Inserting a File Attachment

* When adding file attachments, try to mention words like ***attach*** or ***attachment*** in the message. If you try sending the message without an attachment, Outlook will warn you.
* You can attach files to an open message by dragging them from the folder in File Explorer and dropping them in the message window.

## Attaching Other Outlook Items

* You can insert a message as text in the body of your email rather than as an attachment. Click on the ***MESSAGE*** tab, click on ***Attach Item*** in the ***Include*** group and select **Outlook Item**. Select the folder in ***Look in***, select the ***Items***, click on ***Text only*** under ***Insert as*** and click on **[OK]**.

## Previewing Attachments

* Active content embedded in attachments (including scripts, macros and ActiveX controls) will be disabled during a preview.

## Saving a File Attachment

* You can right-click on an attachment in the ***Reading*** pane or open message to display a shortcut menu, then select **Save** **As** to save the attachment to your hard disk.

## Opening a File Attachment

* Sometimes when you double-click on a file attachment to open it, the ***Opening Mail Attachment*** dialog box will display. From this dialog box, you can either click on **[Open]** to open the file or click on **[Save]** to save it to disk.

# Chapter 6: Flagging Messages

## Flagging Messages in the Message List

* You can add a flag with a custom date to a message. To do this, click on Follow Up and select Custom. Select Flag to or type your own text if desired, and select the Start and Due dates. You can also set a reminder if required by ticking Reminder and setting the date and time.

## Sending a Message With a Flag

* If you want to include a flag in the message for yourself as well as for the recipient, tick ***Flag for Me*** in the ***Custom*** dialog box.
* Consider carefully whether or not to include a reminder for the recipient when you send a flagged message. You don’t want to annoy them.

## Adding a Reminder to Your Messages

* At the specified ***Reminder*** date and time, Outlook will sound the reminder alarm and open the ***Reminder*** dialog box which lists the items and specifies when the items are due. Once the ***Reminder*** date and time have passed, the message text will appear red in the message list.

## Changing the Default Quick Click Flag

* If you often flag messages that need follow‑up but there’s no deadline, set the Quick Click flag to ***No Date***.
* If you change the default Quick Click flag, the flags in previously flagged messages will not change.

## Removing a Flag

* ***Clearing*** a flag or marking a flag as ***complete*** will remove this item from the ***Tasks*** peek.
* To view all completed items, go to ***Tasks***, click on the ***HOME*** tab, click on ***Change View*** in the ***Current View*** group and click on ***Completed***.

# Chapter 7: Junk Email

## Marking Messages as Junk Mail

* If you’re sick of receiving emails from companies that you had previously subscribed to (such as a deals‑of‑the‑day site, online clothing store, etc), you can mark one of the received messages as junk email to add their details to the ***Blocked Senders*** list.

## Marking Messages as Safe

* If you find a legitimate message in your ***Junk   
  E‑Mail*** folder, you can right-click on it and select **Junk** > **Not Junk**. This will move the message back to its original folder (usually the ***Inbox***). Alternatively, you can click on and drag a message from the ***Junk E-Mail*** folder to the ***Inbox***.

## Managing the Senders Lists

* You can manually add a domain name to the ***Safe Senders*** list. To do this, open the ***Junk E‑mail Options*** dialog box, click on **[Add]** and type the domain name in the format ***@domainname.com.au***.
* By default, messages arriving from your Contacts are treated as being trustworthy.

## Importing a Blocked Senders List

* When you import a ***Blocked Senders*** text file, the email addresses in the text file will be added to the existing entries in your ***Blocked Senders*** list.

## Exporting a Blocked Senders List

* Exporting a ***Blocked Senders*** list creates a relatively small text file. This makes it easy to email the list to others as a file attachment.

## Deleting Junk Email

* You can permanently delete all items from the ***Junk E‑mail*** folder in one step. To do this click on the ***Junk E‑mail*** folder, click on the ***FOLDER*** tab and click on ***Empty Folder*** in the ***Clean Up*** group. Note that this option is available only for your default Outlook data file (not the course data file).

# Chapter 8: Working With the Calendar

## Accessing the Calendar

* Calendars are created in folders or files. You can create as many calendars as you require for your own specific purposes.

## Changing the Calendar Arrangement

* You can change the days comprising a work week and set the start and end times for a work day in the ***Outlook Options*** dialog box. To do this, click on the ***FILE*** tab to open the ***Backstage***, click on the ***Options*** tab, click on the ***Calendar*** category, and then set the desired options under ***Work time***.

## Displaying Specific Dates

* After displaying a specific day in the calendar, you can print it. To do this, click on the ***FILE*** tab to display the ***Backstage***, click on the ***Print*** tab and then click on the desired print style setting such as ***Daily Style***, ***Weekly Calendar Style*** and so on.

## Navigating Within a Calendar

* You can show more than one calendar on the screen at a time and you can navigate within each one. If you display more than one calendar side-by-side, each calendar appears in a different colour.

## Changing the Current View

* You can create a custom view of your calendar. To do this, click on***Change View*** in the ***Current View*** group, select **Manage Views** to display the ***Manage All Views*** dialog box, and then click on **[New]**.

## Creating a Second Time Zone

* When you add a second time zone, the current time in the primary time zone is highlighted in orange making it easier to see.
* The second time zone is used only to show a second time bar in ***Calendar*** view. It doesn’t affect the way in which Calendar items are stored or displayed.

## Removing a Time Zone

* When you have two time zones displayed, you can quickly switch from your current time zone to the other time zone. To do this, right-click in the empty space at the top of the time bar, then select **Change Time Zone** to open the ***Outlook Options*** dialog box. Click on **[Swap Time Zones]** and then click on **[OK]**.

## Creating a New Calendar

* If you’re an Exchange user and you have a set of calendars that you frequently view together (such as the members in your team), create a calendar group as it makes it quicker to see their schedules. Click on the ***HOME*** tab, click on ***Calendar Groups*** and select **Create New Calendar Group**.

## Working With Multiple Calendars

* If you have five or more calendars open, the calendar will automatically display in ***Schedule view***.

## Deleting a Calendar

* If you have deleted the wrong calendar, you may be able to recover it from the ***Deleted Items*** folder in the ***Folders List***. To display the ***Folders List***, click on the ellipses in the ***Navigation*** bar and select **Folders**. Drag the calendar out of the ***Deleted Items*** folder. Click on ***Calendar*** to close the ***Folders List***.

# Chapter 9: People

## Viewing Your Contacts

* You can create a custom view for displaying your contacts. To do this, click on the ***More*** button for ***Current View*** and select **Manage Views** to open the ***Manage All Views*** dialog box. Click on **[New]** to open the ***Create a New View***dialog box, type a name and then add and remove fields as desired.

## Creating a New Contact

* You can create a new contact from an existing contact. Click on a contact, press  +  and then  + . Click on ***Add new contact*** in the ***Duplicate Contact Detected*** dialog box and click on **[Add]**. Double-click on the new contact and make the desired changes in the people card.

## Entering Contact Details

* Wherever possible, find out the email address of the contact and include it in the card as you enter the new details. Even though you may not have a need to use it right now, you probably will in the near future.

## Editing Contact Details

* When in ***People*** view, you can double-click on a name in the alphabetical list of contacts to open an editing window with a selection of contact details for you to edit.
* Double-clicking on a contact in ***Business Card*** view automatically opens the ***Contact*** form for that person.

## Inserting a Contact Picture

* Naturally, there are privacy issues that come into play when dealing with pictures of other people. You should only include a photo if you have been given permission to do so.

## Adding Contacts for an Existing Company

* Being able to add new contacts for an existing company is particularly useful if you have a number of contacts to enter from the same company – perhaps you may have just won a contract with a large company and you will need to keep in contact with several of their employees.

## Printing Contact Details

* If you want to print only specific contacts, select them before opening the ***Backstage***. You must then click on **[Print Options]**, select ***Only selected items*** under ***Print range*** and click on **[Print]**. You can also select to print only particular pages by clicking on **[Print Options]**.

## Deleting an Unwanted Contact

* Deleted contacts are sent to the ***Deleted Items*** folder. But, if you wish to permanently delete a contact, press  + .

## Recovering a Deleted Contact

* If you delete a contact item from the ***Deleted Items*** folder it will be gone forever.
* You can also right-click on a deleted record in the ***Deleted Items*** folder and select **Move** > **Other Folder**.

# Chapter 10: Tasks

## Creating Tasks

* You can press  +  +  to display the new task window.

## Changing Task Views

* You can create your own custom views by clicking on ***Change View***,selecting **Manage Views** to open the ***Manage All Views*** dialog box and clicking on **[New]**.
* You can ***filter*** the data that appears in the list by clicking on ***View Settings*** in the ***Current View*** group and clicking on **[Filter]**.

## Sorting Tasks

* If you categorise tasks, you can sort them by categories. To assign a category to a task, double-click on the task to open it in a task window, click on ***Categorise*** in the ***Tags*** group, select the desired category, then click on ***Save & Close*** in the ***Actions*** group.

## Working With Tasks

* You can mark a task as completed by right‑clicking on the task and selecting **Mark As Completed**. To remove the mark, simply select **Mark As Completed** again or click on the box to the left of the task so it appears without a tick.

## Deleting Tasks

* As with all items in Outlook, when tasks are deleted they are moved to the ***Deleted Items*** folder. They can, of course, be recovered from here. If you wish to permanently delete a task, press  + .
* You can also delete a task by selecting it and pressing .

## Printing a Task List

* If you wish to print just the details for one task, open the task in a ***Task*** window and use the print options from there.
* If you want to print specific tasks, press  and click on the desired tasks before opening the ***Print*** tab in the ***Backstage***.