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Microsoft Outlook 2013

Level 2

Handy Tips

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# Chapter 1: Editing Messages

## Copying Text Within a Message

* You can use the standard Windows keyboard shortcuts for copying and pasting information in an email message. For example,  +  will copy a selection to the clipboard and  +  will paste it.

## Copying Text Between Messages

* To move text either within a message or to another message, click on ***Cut*** in the ***Clipboard*** group, position the cursor where you want the text inserted, then click on the top half of ***Paste***.
* The keyboard shortcut for ***Cut*** is  + .

## Copying From Another Source

* You may need to reformat data pasted into an email message that you have copied from another application.

## Deleting Text

* If you accidentally delete the wrong text, click on ***Undo*** in the ***Quick Access Toolbar*** to reverse the deletion.

## Removing an Attachment

* You can remove an attachment from an open message by highlighting the attachment file’s name and pressing .

# Chapter 2: Organising Messages

## Creating a Message Folder

* You can also create a new mail folder by   
  right-clicking on an existing folder in the ***Folder*** pane and selecting **New Folder**.

## Moving Messages

* You can drag messages between folders in the message list and from a folder to a folder icon in the ***Folder*** pane.
* You can drag and drop folders to new locations in the same way that you can drag and drop mail messages. Any items within a moved folder will move with the folder.

## Copying Messages

* You can copy messages between folders using the drag and drop method. To do this, select the messages to be copied in the message list, and then press  while you drag them to a new folder in the ***Folder*** pane.

## Deleting Messages

* If you delete items from the ***Deleted Items*** folder, they will be permanently removed from Outlook.
* You can permanently delete a selected message from any folder by pressing  + . A message asking you to confirm your intention will appear.

## Recovering Deleted Messages

* You can delete or recover multiple messages simultaneously. To do this, click on the first message, then press  and click on the desired messages. Press  to delete them or right-click on them and select **Move** > *folder name* to recover deleted messages.

## Cleaning Up Conversations

* If you have numerous conversations in a folder, you can use the ***Clean Up Folder*** or ***Clean Up Folder & Subfolders*** options on ***Clean Up*** to clean them simultaneously.

## Working With Favourites

* The ***Favourites*** folders list can have   
  top-level folders only, not subfolders.
* When the ***Folder*** pane is minimised each folder in ***Favourites*** will appear in its own vertical folder button. The length of each button is determined by its folder name so keep them short.

## Deleting Message Folders

* You can also delete a message folder by right-clicking on it in the ***Folder*** pane and selecting **Delete Folder**.

## Recovering Deleted Folders

* When you recover a deleted folder, all messages in the folder will be recovered as well as the folder itself.

## Emptying Deleted Items

* You can set Outlook to automatically delete ***Deleted Items*** whenever you exit Outlook. Click on the ***File*** tab, click on ***Options*** to open the ***Options*** dialog box, then click on the ***Advanced*** category. Tick ***Empty Deleted Items folder when exiting Outlook*** under ***Outlook start and exit***

## Customising a Default Quick Step

* You can customise any quick step by clicking on the ***More*** arrow for ***Quick Steps*** and selecting ***Manage Quick Steps*** to open the ***Manage Quick Steps*** dialog box. Here you can choose to edit, duplicate or delete an existing quick step, or create a new quick step.

## Creating a Quick Step

* If you want to create a quick step that is very similar to an existing one, select ***Manage Quick Steps*** in the gallery, click on the existing quick step and click on **[Duplicate]**. You can then modify the details as desired.
* You can also create a quick step by selecting **New Quick Step** in the ***Quick Steps*** gallery.

## Using Quick Steps

* To make a quick step’s function clearer, you can add a tooltip that will appear when you hover over it in the ***Quick Steps*** gallery. You can do this by typing the desired text in ***Tooltip Text*** at the bottom of the ***Edit Quick Step*** dialog box either when you create a quick step or by editing it later.

## Archiving Messages

* You can set older Outlook items to be archived automatically on a regular interval. To do this click on the ***FILE*** tab, click on ***Options*** and select the ***Advanced*** category. Click on **[AutoArchive Settings]**.

## Recovering Archived Messages

* To ensure you have the best chance for finding the right archive file and as quickly as possible, clearly name all archive files.

# Chapter 3: Searching

## Using Instant Search

* Press  +  to access ***Instant Search***.
* Attachments are searched but matching phrases aren’t highlighted in the results.
* If ***Close Search*** appears red, Outlook is still performing the search. You can click on it while it is red to stop the search.

## Expanding the Search

* If you want to perform a very specific search, you may find it useful to use the ***Advanced Find*** dialog box. To display this, press  +  to initiate ***Instant Search***, then click on ***Search Tools*** in the ***Options*** group and select **Advanced Find**.

## Using Recent Searches

* Outlook displays the search query syntax (such as *Europe − sales*) that was used to perform each of the searches that are included on the ***Recent Searches*** list.

## Search Options

* If you click on ***Try searching again in All Mail Items*** at the bottom of the search results, the ***Deleted Items*** folder will not be searched by default. To include this folder, tick ***Include messages from the Deleted Items folder in each data file when searching All Items*** in the ***Search Options***.

## Searching Other Outlook Items

* If a search doesn’t find what you’re looking for, try widening it by clicking on ***Try searching again in All Items*** at the bottom of the search results.
* If you don’t remove a search field prior to closing a search, it will appear the next time you activate ***Instant Search***.

## Using a Search Folder

* Although messages can appear in different search folders, they are stored only once in the mailbox.
* Search folders appear with a magnifying glass icon to clearly distinguish them from other folders.

## Adding a Predefined Search Folder

* The predefined search folders have been grouped into three groups in the ***New Search Folder*** dialog box: ***Reading Mail***, ***Mail from People and Lists*** and ***Organising Mail***.

## Customising Predefined Search Folders

* You can ***delete*** predefined search folders. To do this, right-click on the folder and select **Delete “folder name”**, then click on **[Yes]** to confirm the deletion. Deleting a search folder only deletes the folder, not the messages that are displayed in it.

## Creating a Custom Search Folder

* Search folders support prefix matching in the text strings that you specify in the ***Search Folder Criteria*** dialog box. For example, if you type **pen** in ***Search*** ***for the word(s)***,thesearch folder will display messages with words like ‘pendant’ or ‘pens’, but it won't include words like ‘open’.

# Chapter 4: Working With Views

## Changing the Current View

* You can change the settings used by the default views. To do this, click on ***Change View*** and select **Manage Views**. Click on the ***VIEW*** tab and click on **[Modify]**. You can revert to the default settings for a predefined view by changing the view to the desired view and clicking on ***Reset View***.

## Arranging Messages Within a View

* To arrange the view into groups, make sure ***Show in Groups*** is ticked in ***Arrangement***.
* You can group messages by ***conversations*** (all messages with the same Subject even if they’re stored in different mail folders) by ticking ***Show as Conversations*** in the ***Messages*** group on the ***VIEW*** tab.

## Sorting Messages Within a View

* Text-based columns, such as ***From***, will be sorted in an ascending order (***A*** to ***Z***)when you first click on their heading. The reverse is true for number-based columns – for example, ***Size*** will be sorted from largest to smallest and ***Received*** will be sorted from latest to oldest.

## Working With Columns in a View

* You can remove a column from the current message view by right-clicking on the column heading and selecting **Remove This Column**.

## Formatting Columns in a View

* You can alter all features of a specific view from the one location. To do this, click on ***Change View*** in the ***Current View*** group and select **Manage Views**. After selecting the view in the ***Manage All Views*** dialog box, you can then set a filter, alter the fonts, reset the defaults for the view, plus more.

## Creating a Custom View

* You cannot rename a predefined view, even if you have customised it. Instead, copy the predefined view, give the copied view a new name, and then change the settings.
* New views are listed in the ***Change View*** gallery.

## Adding a Filter to a Custom View

* When a View filter is applied to a selected folder, the words ***FILTER******APPLIED***will appear to the left of the status bar.

## Deleting a Custom View

* If you accidentally delete a custom view, you cannot undo the deletion. Instead, you will have to rebuild the view again.

# Chapter 5: Colour Categories

## Creating a New Colour Category

* If you like using keyboard shortcuts for functions, you can assign a keyboard shortcut to a new colour category while you are creating it.
* You can **[Rename]** the default colour categories to something more meaningful in the ***Colour Categories*** dialog box.

## Assigning a Colour Category

* Only the 15 most recently-used colour categories appear in the **Categorise** gallery. To see all colours, select **All Categories** to open the ***Colour Categories*** dialog box.
* The ***Colour Categories*** dialog box lets you assign multiple categories to an item at once by clicking on the desired checkboxes.

## Finding Messages With Categories

* You can display a list of all categorised messages by clicking in the ***Instant Search*** box, clicking on ***Categorised*** and selecting **Any Category**. You can then sort the list by clicking on the ***VIEW*** tab and clicking on ***Categories*** in the ***Arrangement*** group.

## Removing Categories From Messages

* You can remove a colour category from an open message. To do this, click on ***Categorise*** and select **Clear All Categories** to remove all categories from the open message or select the category to remove only one category when more than one has been applied to the message.

## Deleting a Colour Category

* You can change the colour of the categories using the ***Colour Categories*** dialog box. To do this, click on ***Categorise*** and select **All Categories**. Click on the Colour Category ***Name***, select the desired ***Colour*** and click on **[OK]**. All items with that category will be updated.

# Chapter 6: Working With Rules

## Creating a New Rule From a Template

* You can create a rule directly from a specific message. For example, you can create a rule to move messages from the selected sender to a specific folder by right-clicking on the message, selecting **Rules** > **Create Rule** and then completing the ***Create Rule*** dialog box.

## Selecting the Rule Conditions

* You can apply multiple descriptions (criteria) to any rule you create. But Outlook will not activate the rule unless a message meets ALL of the rule’s criteria.

## Selecting the Rule Actions

* If you work in an organisation that uses ***Microsoft Exchange***, by default, messages that you forward to external email addresses outside your organisation using a rule will not be sent. This setting aims to help prevent the disclosure of corporate data and is controlled by your Exchange administrator.

## Selecting the Rule Exceptions

* You can make any changes to the rule as you are creating it by simply clicking on **[Back]** to return to the desired page of the ***Rules Wizard***.

## Naming and Reviewing the Rule

* During the final step of creating a rule, you can specify to run this rule now on the default Mail folders by clicking in the ***Run this rule now on messages already in “folder”*** checkbox in the ***Step 2*** box on the ***Finish rule setup*** page of the ***Rules Wizard***.

## Testing the Rule

* You can run a rule periodically. To do this click on the ***FILE*** tab, click on **[Manage Rules & Alerts]**, clear the checkbox for the rule to turn it off, then click on **[Run Rules Now]**. Tick the rule under ***Select rules to run***, select the ***Run in Folder*** and ***Apply rules to***, and then click on **[Run Now]**.

## Managing Existing Rules

* You can change the order in which the activated rules (their checkboxes are ticked) are actioned using the ***Rules and Alerts*** dialog box. To do this, click on the rule to be moved and then click on either ***Move Up*** or ***Move Down***.

# Chapter 7: Email Techniques

## Recalling a Sent Message

* Most home and personal accounts do not use Microsoft Exchange. So for example, if you have sent an email to someone's personal internet service provider (ISP) POP3 email account, you will not be able to recall the sent email message.

## Printing a Message

* You can print the attachments in your message by clicking on **[Print Options]** in the ***Backstage*** to open the ***Print*** dialog box and then ticking ***Print attached files***.
* You can click on **[Define Styles]** in the ***Print*** dialog box to edit or create new ***Print styles***.

## Printing a Message List

* You can print a list of selected messages in the current folder. To do this select the desired messages, click on the ***FILE*** tab, click on ***Print*** and select ***Table Style*** under ***Settings***.Click on **[Print Options]**, select ***Only selected rows*** under ***Print range*** and then click on **[OK]**. Click on **[Print]**.

## Changing the Message Format

* You can change the message format for all messages in the ***Backstage***. Click on the ***FILE*** tab, click on ***Options***, then click on ***Mail*** to display the mail options. Click on the drop arrow for ***Compose messages in this format*** under ***Compose messages***, select the desired format and click on **[OK]**.

## Choosing Themes or Stationery

* The format and styles used in some ***stationery*** and ***theme*** options can be a little overwhelming. Choose subtle options, such as ones with a picture or image down the side, or ones with a very subdued background pattern, rather than very busy or overstated designs.

## Applying a Theme or Stationery to a Message

* Once you have used a particular theme or stationery option in a new message by clicking on ***New Items*** and then selecting **E-mail Message Using** > **More Stationery**, the theme or stationery option will appear at the top of the **E-mail Message Using** submenu.

## Turning Themes or Stationery Off

* If you don’t want to receive messages with a theme or stationery applied, you can choose to display all open messages in plain text. This will also remove all formatting from the message. To do this, select ***FILE*** > ***Options*** > ***Trust Centre*** > ***Trust Centre Settings*** >   
  ***E-mail Security***.

## Applying a Theme

* You can only apply a theme to a message that has been created using the default HTML message format.
* You can see which theme is applied to a message by hovering over ***Themes***. The theme name will appear in the tooltip.

## Saving a Message Draft

* You can save a message in a folder other than the ***Drafts*** folder by clicking on ***Save Sent Items To*** in the ***More Options*** group on the ***OPTIONS*** tab and selecting **Other Folder**.

## Using a Saved Message

* You can save the message as often as you like. If you have no need to retain a saved message you can delete it from the ***Drafts*** folder.

## Sending a Voting Message

* Outlook offers three sets of voting button options plus the ability to create your own custom voting button names. For example, you might create the custom voting buttons ***Monday;Tuesday;Wednesday*** to find out which of the three days best suits your colleagues for weekly staff meetings.

## Responding to a Voting Message

* As well as responding to a voting message by simply selecting the desired voting option, you can include a note for the sender along with your vote in the response message. To do this, select the voting option, click on ***Edit the response before sending***, click on **[OK]**, and then type and send the message.

## Tracking Voting Responses

* You can export poll responses to Excel. To do this, open the original message with the voting buttons and click on ***Tracking*** in the ***Show*** group. Select the desired rows, press  + , open Excel, click in a cell and press  +  to paste the data.

## Sending Automatic Responses

* You must have a Microsoft Exchange Server account for automatic replies to work.
* Outlook will respond only once for each sender.

# Chapter 8: Appointments and Events

## Quickly Scheduling an Appointment

* If you right-click on an empty timeslot a menu will appear from which you can select options for quickly changing the start or end date and time.

## Scheduling Using the Appointment Window

* When you create an appointment Outlook will remind you, by default, 15 minutes before the appointment is due to start. It does this by displaying a message advising you of the appointment. You can select a different reminder time by clicking on ***Reminder*** in the ***Options*** group.

## Rescheduling an Appointment to Another Day

* An even quicker method for moving an appointment to another day in the calendar is to display the calendar in ***Weekly*** view and then drag the appointment to a new time and date slot. If you drag the appointment in ***Monthly*** view, the meeting will be rescheduled at the same timeslot.

## Rescheduling an Appointment to Another Time

* You can move an appointment to another day by dragging it off the calendar and onto a date in the ***Date Navigator***. The start and end times will remain the same as they were on the original day.

## Creating Recurring Appointments

* You can change an existing appointment to recurrent by clicking on the appointment in the calendar to select it, and then clicking on ***Recurrence*** in the ***Options*** group on the ***CALENDAR TOOLS: APPOINTMENT*** tab.

## Changing Recurring Appointments

* If you use the mouse to drag a particular recurring appointment to another timeslot, you will update the time/date for that particular appointment only – not for all recurring appointments in the series.

## Scheduling an Event

* You can add new activities by clicking on ***New Items*** in the ***New*** group on the ***HOME*** tab and selecting the desired option – **Appointment**, **Meeting, All Day Event**, etc.
* You can edit an all-day event by dragging it to a different day or by double-clicking on it to open it in the ***Event*** window.

## Scheduling Free and Busy Times

* If your calendar can be accessed and viewed by other people, it is important that you specify the ***Show As*** time for each activity correctly as this will determine your availability.

## Categorising Activities

* You can clear a category from an activity. To do this, click on the activity, click on ***Categorise*** and select **Clear All Categories**.
* You can apply more than one category to a calendar activity.

## Printing Your Calendar

* You can display the preview of the calendar in the ***Backstage*** at 100% so you can read the details. To do this: click on the ***FILE*** tab, click on ***Print***, then click on ***Actual Size*** which is located in the bottom right corner of the window.

## Deleting Activities

* You can delete selected appointments or events using the keyboard shortcut  + .

# Chapter 9: Scheduling Meetings

## Scheduling a Meeting

* If you have access to the invitees’ calendars, the ***Room Finder*** pane (which appears by default on the right side of the ***Meeting*** window) will show suggestions for the best time for your meeting – this is the time when most invitees are available. To select a time, click on a time under ***Suggested times***.

## Responding to Meeting Requests

* You can see how the meeting fits into your schedule from the ***calendar snapshot*** that is included near the top of the message. You can scroll up and down to see where you have activities already scheduled on the day.

## Tracking Meeting Responses

* There are a number of places where you can see who has accepted a meeting. The easiest is to open the message response in the ***Inbox***, but the more comprehensive is to open the meeting in the ***Calendar*** since meetings are automatically updated from responses.

## Changing a Meeting

* If a meeting invitee uses the ***Reading*** pane to view a message informing them of a change to the meeting, a comment will appear at the top left of the message notifying them that they don’t have to respond to the message.

## Adding or Removing Attendees

* If you make other changes to a meeting while adding or removing attendees, you should send the updates to all attendees.

## Preventing Responses

* You can prevent responses after you have sent the initial meeting request. To do this, double-click on the meeting to open it, click on ***Response Options*** in the ***Attendees*** group, select **Request Responses**, and click on ***Send Update***.

## Cancelling a Meeting

* When you cancel a meeting, invitees will receive a ***Cancelled: Meeting Name*** message in their ***Inbox***. To delete the meeting from their calendar, they can click on ***Remove from Calendar*** in either the ***Reading*** pane or the ***Respond*** group in the open ***Meeting*** window.

## Using the Scheduling Assistant

* You can move the meeting to a different timeslot by clicking on a blank area of the free/busy grid in the ***Scheduling Assistant***.
* You can change the start and end times for the meeting in the ***Scheduling Assistant*** by dragging the green (start) and red (end) lines as desired.

## Scheduling Meetings Using Calendar Groups

* You can create a new calendar group by displaying the desired calendars, clicking on ***Calendar Groups*** and selecting **Save As New Calendar Group**.
* You can add a shared calendar to a calendar group by dragging it onto the calendar group’s name in the ***Navigation*** pane.

# Chapter 10: Managing Contacts

## Adding a Contact From an Email

* When creating a contact from an email message, the new contact details will be automatically saved into the Contacts folder in the default Outlook data file.

## Pinning a Contact to Favourites

* You can display your favourites in the ***To-Do*** bar in People mode. Click on the ***VIEW*** tab, click on ***To-Do Bar*** and select **People**.
* You can add a contact to your favourites from an email by right-clicking on the header in the Reading pane and selecting **Add to Favourites**.

## Contacting a Contact

* To email a contact in all views other than ***People view***, click on the desired contact, click on the ***HOME*** tab, then click on ***Email*** in the ***Communicate*** group.

## Contacting a Contact From the People Peek

* Only contacts that you’ve added to favourites are listed in the people peek. But you can quickly communicate with other contacts from this peek by starting to type their name in the search box at the top of the peek, and then pointing to or clicking on the required person in the search results.

## Forwarding Contacts

* If you’re composing a new email, you can forward a contact’s details as a vCard from within the Message window. To do this, click on ***Attach Item*** in the ***Include*** group and select **Business Card**.

## Creating a Contact Group

* You can add a new member to a contact group who is not one of your contacts. Click on ***Add Members***, select **New E-mail Contact** and then enter the name and email details. If you tick ***Add to Contacts*** in the ***Add New Member*** dialog box, their details will be added to your Contacts folder.

## Using a Contact Group

* Contact groups appear in bold in normal address lists and they also have a special icon showing two heads – rather than a single head for an individual contact. In people modetheir contact details include different data and look different to those for an individual contact.

## Using a Partial Contact Group

* If you find yourself deleting the same names from the contact group on a regular basis, simply create an additional contact group without these names and addresses in it!

## Deleting Members From a Contact Group

* To delete a contact group, click on its name in people mode and click on ***Delete***.
* If you click on ***Delete Group*** in the ***Actions*** group while trying to delete a selected member from a contact group, you will delete the entire contact group – no questions asked.

## Linking Contacts

* If you have two mail accounts configured and a contact exists in the Contacts folder of both accounts, the details of these two separate contacts are merged on a single Contact Card in ***People*** view. Note, however, ***People*** view is a merged view of the contact; it doesn’t actually change any contact details!

# Chapter 11: Task Requests

## Creating a Task Request

* You can create a new task from an email message. To do this, drag it from the ***Inbox*** to ***Tasks*** in the ***Navigation*** bar. A ***Task*** window will open containing the details from the message.

## Responding to a Task Request

* If you choose to decline a task request by clicking on ***Decline*** in the ***Respond*** group, the initiator will receive a message saying that you have rejected the task. The initiator can then reclaim the task (so that they can reassign it) by opening the message and selecting ***Return to Task List***.

## Completing an Assigned Task

* Whenever you change a task an update message may be sent to the initiator − so ensure you don’t change a task too often!
* If you partially complete a task you can show this by typing the apt figure in ***% Complete***. You can click on ***Send Status Report*** to send a report to the task initiator.

## Viewing Updated Task Requests

* A ***Task Completed*** email message is only sent when the task is completed by the owner. A message with the task details, however, is sent every time the owner makes a change to the task.
* Only the task owner can change the details in a task.