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Level 2

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# Chapter 1: Editing Messages

## To Copy Text Within a Message:

1. Select the text to copy, then click on the ***COMPOSE TOOLS: MESSAGE*** tab

2. Click on ***Copy*** in the ***Clipboard*** group

3. Position the insertion point where you want the text inserted, then click on the top half of ***Paste*** in the ***Clipboard*** group

## To Copy Text Between Messages:

1. Open a message, click on the ***MESSAGE*** tab, click on ***Actions*** in the ***Move*** group, then select **Edit Message**

2. Select the text, click on ***Copy*** in the ***Clipboard*** group then close the message

3. Open a new message, click on ***Paste***

## To Copy Data From Another Source:

1. Open the application with the data

2. Click on ***Copy***

3. Open the mail message

4. Position the cursor, then click on the top half of ***Paste*** in the ***Clipboard*** group

## To Delete Text in a Message:

1. Select the desired text

2. Press 

## To Remove an Attachment From a Message:

1. Open the message with the attachment

2. Right-click on the attachment

3. Select **Remove**

# Chapter 2: Organising Messages

## To Create a New Message Folder:

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

2. Type the name of the new folder and choose where to place the folder

3. Click on **[OK]**

## To Move Messages:

1. Select the messages to move

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

3. Click on the desired folder

## To Copy Messages:

1. Select the messages

2. Click on ***Move*** in the ***Move*** group, then select **Copy to Folder**

3. Click on the name of the destination folder, then click on [OK]

## To Delete a Message:

1. Select the messages you wish to delete in the message list

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

## To Recover Deleted Messages:

1. Click on ***Deleted Items*** in the ***Folder*** pane

2. Select the required messages in the message list

2. Right-click on a selected message and select **Move** > *folder name*

## To Clean Up a Conversation:

1. Click on the conversation

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

3. Select **Clean Up Conversation**

## To Work With the Favourites Folders List:

* Right-click on a folder and select **Show in Favourites**
* Drag the folder to the desired location in the folder list
* Right-click on a folder and select **Remove from Favourites**

## To Delete a Message Folder:

1. Double-click on the folder in the ***Folder*** pane

2. Click on ***Delete Folder*** in the ***Actions*** group on the ***FOLDER*** tab

3. Click on **[Yes]**

## To Recover a Deleted Folder:

1. Double-click on the folder in ***Deleted Items***

2. Click on ***Move Folder*** in the ***Actions*** group

3. Click on the destination folder

4. Click on **[OK]**

## To Empty the Deleted Items Folder:

1. In the ***Folder*** pane, right-click on ***Deleted Items***

2. Select **Empty Folder**

3. Click on **[Yes]**

## To Customise a Default Quick Step:

1. Click on the ***HOME*** tab, then click on the default Quick Step

2. Set the options as desired

3. Click on **[Save]**

## To Create a Quick Step:

1. Click on ***Create New*** in the ***Quick Steps*** gallery

2. Type a ***Name*** and select an ***icon*** (optional)

3. Select an action in ***Choose an Action***

4. Click on **[Add Action]** as needed

5. Click on **[Finish]**

## To Use a Quick Step:

1. Select the message in the message list

2. Click on the quick step in the ***Quick Steps*** gallery

## To Archive Messages:

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

2. Select **[Cleanup Tools]** > **Archive**

3. Specify the date

4. Specify the archive file name and location

5. Click on **[OK]**

## To Recover Archived Messages:

1. Select **FILE** > **Open** > **Import**

2. Select ***Import from another program or file*** and ***Outlook Data File (.pst)***

3. Locate and open the archive file

4. Select the folder and click on **[Finish]**

# Chapter 3: Searching

## To Use Instant Search:

1. Select the folder you wish to search

2. Type the search criteria in the ***Instant Search*** box

3. Click on the desired item

## To Specify More Advanced Search Criteria:

1. Click in ***Instant Search***

2. Click on the desired option in the ***SEARCH TOOLS: SEARCH*** tab of the ribbon

## To Perform a Recent Search:

1. Click in ***Instant Search***

2. Click on ***Recent Searches*** in the ***Options*** group

3. Select the desired query

## To Change the Search Options:

1. Click in ***Instant Search***

2. Click on ***Search Tools*** and select **Search Options**

3. Make the desired changes

4. Click on **[OK]**

## To Search for Other Outlook Items:

1. Open the desired folder by clicking on its button in the ***Folder*** pane

2. Click in the ***Instant Search*** box

3. Type the search criteria

## To Use the Unread Mail Search Folder:

1. Expand ***Search Folders*** in the ***Folder*** pane

2. Click on ***Unread Mail***

## To Add a Predefined Search Folder:

1. Click on ***New Search Folder*** in the ***New*** group on the ***Folder*** tab

2. Click on the desired search folder

3. Click on **[OK]**

## To Customise a Predefined Search Folder:

1. Right-click on the desired folder

2. Select **Customise This Search Folder**

3. Change the ***Name*** and ***Criteria*** as desired

4. Click on **[OK]** twice

## To Create a Custom Search Folder:

1. Click on ***New Search Folder*** in the ***New*** group on the ***FOLDER*** tab

2. Click on ***Create a custom Search Folder***

3. Click on **[Choose]**

4. Type the ***Name*** and enter the ***Criteria***

# Chapter 4: Working With Views

## To Change the Current Message View:

1. Click on the folder you wish to view

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

3. Select the desired view

## To Change the Arrangement of the Current View:

1. Click on the folder you wish to view

2. Click on the ***VIEW*** tab

3. Click on the desired view in the ***Arrangement*** group

## To Sort Messages in a View:

1. Click on a column heading, then click on the same heading again to reverse the order, or

1. On the ***VIEW tab***, click on the desired option in ***Arrangement***

2. Click on ***Reverse Sort*** as necessary

## To Move Columns in the Current View:

1. Drag the column heading to the desired position

To ***remove columns*** from the ***current view***:

1. Drag the column heading down and off the column heading area

## To Alter the Width of a Column Using the Mouse:

1. Drag the column marker as desired

To ***format*** a ***column***:

1. On the ***VIEW*** tab, click on ***View Settings*** in the ***Current View*** group and click on **[Format Columns]**

2. Click on the field and alter the options

## To Create a New View From an Existing View:

1. Select ***Change View*** > ***Manage Views***

2. Select the viewand then click on **[Copy]**

3. Name the view and then click on **[OK]**

4. Customise the view as desired

5. Click on **[OK]** twice then on **[Apply View]**

## To Add a Filter to a Custom View:

1. Select ***Change View*** > ***Manage Views***

2. Select the viewand then click on **[Modify]**

3. Click on **[Filter]**

4. Specify the desired filter criteria

5. Click on **[OK]** twice then on **[Apply View]**

## To Delete a Custom View:

1. Select ***Change View*** > ***Manage Views***

2. Click on the desired custom view

3. Click on **[Delete]**

4. Click on **[Yes]** and then on **[Close]**

# Chapter 5: Colour Categories

## To Create a New Colour Category:

1. Click on the ***HOME*** tab, then click on ***Categorise*** in the ***Tags*** group

2. Select **All Categories**, then click on **[New]**

3. Type a ***Name***, select a ***Colour***, then click on **[OK]**

## To Assign a Colour Category to a Message:

1. Select the desired message/s

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

3. Select the colour category

## To Find Messages That Have Had One or More Colour Categories Assigned to Them:

1. Click in ***Instant Search***

2. Click on ***Categorised*** in the ***Refine*** group, then select the category

3. Repeat step ***2*** for each additional category

## To Remove Categories From a Message:

1. Select the message/s in a message list

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

3. Select **Clear All Categories** to remove all, or

Select **All Categories** to remove specific categories when more than one is applied

## To Delete a Colour Category:

1. Click on the ***HOME*** tab, click on ***Categorise*** in the ***Tags*** group, then select **All Categories**

2. Click on the Colour Category ***Name***

3. Click on **[Delete]**

4. Click on **[Yes]**, then click on **[OK]**

# Chapter 6: Working With Rules

## To Create a New Rule Based on a Template:

1. Click on the ***FILE*** tab, then click on **[Manage Rules & Alerts]**

2. Click on **[New Rule]**

3. Select the desired template

4. Click on **[Next]**

## To Set Conditions for a New Rule:

1. Open the ***Which condition(s) do you want to check*** page of the ***Rules Wizard***

2. Select the desired conditions in ***Step 1***

3. Edit the rule description in ***Step 2***

4. Click on **[Next]**

## To Select the Rule Actions:

1. Open the ***What do you want to do with the message*** page of the ***Rules Wizard***

2. Select the desired actions in ***Step 1***

3. Edit the rule description in ***Step 2***

4. Click on **[Next]**

## To Select the Rule Exceptions:

1. Open the ***Are there any exceptions*** page of the ***Rules Wizard***

2. Select the desired exceptions in ***Step 1***

3. Edit the rule description in ***Step 2***

4. Click on **[Next]**

## To Finalise a Rule:

1. Open the ***Finish rule setup*** page of the ***Rules Wizard***

2. Specify a name in ***Step 1***

3. Select to turn the rule on or off in ***Step 2***

4. Review the rule’s details in ***Step 3***

5. Click on **[Finish]** and then on **[OK]**

## To Test a Rule:

1. Send or receive a message that conforms to all actions included in the rule

2. Ensure that the desired actions were performed

## To Change an Existing Rule:

1. Click on the ***FILE*** tab, then click on **[Manage Rules & Alerts]**

2. Select the desired rule

3. Click on **[Change Rule]** and select **Edit Rules Settings**

4. Make the desired changes

# Chapter 7: Email Techniques

## To Recall a Sent Message:

1. Click on ***Sent Items*** in the ***Folder*** pane and double-click on the message

2. Click on ***Actions*** in the ***Move*** group and select **Recall This Message**

3. Select the desired options, then click on **[OK]**

## To Print a Message From a Message List or an Open Message:

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

2. Select ***Memo Style*** in ***Settings***

3. Click on **[Print]**

## To Print a Message List:

1. Click on the ***Inbox***

2. Select the desired view

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

4. Select ***Table Style*** under ***Settings***

5. Click on **[Print]**

## To Change the Format for a Single Message:

1. Create a new message

2. Click on ***Plain Text*** in the ***Format*** group on the ***FORMAT TEXT*** tab

3. Enter the text

4. Send the message

## To Choose a Stationery/Theme for All Messages:

1. Click on the ***FILE*** tab, click on **[Options]** then click on ***Mail***

2. Click on **[Stationery and Fonts]**, then click on **[Theme]**

3. Select the desired option

4. Click on **[OK]** three times

## To Apply a Theme/Stationery to a Single Message:

1. Click on ***New Items***, thenselect **New   
E-mail Message Using** > **More Stationery**

2. Select the desired ***theme*** or ***stationery***, then click on **[OK]**

4. Compose and send the message

## To Turn Off Themes or Stationery:

1. Click on the ***FILE*** tab, click on **[Options]**, and then click on ***Mail***

2. Click on **[Stationery and Fonts]**

3. Click on **[Theme]** and select ***(No Theme)***

4. Click on **[OK]** three times

## To Apply a Theme to a Message:

1. Create the message

2. Click on the ***OPTIONS*** tab, then click on ***Themes*** in the ***Themes*** group

3. Click on the desired theme

4. Send the message

## To Save a Message as a Draft:

1. Compose the message

2. Click on the ***FILE*** tab, then click on ***Save***

## To Use a Saved Message:

1. Click on ***Drafts***

2. Double-click on the saved message

3. Complete and send the message

## To Send a Voting Message:

1. Compose the message

2. Click on ***Use Voting Buttons*** in the ***Tracking*** group on the ***Options*** tab

3. Select the desired option

4. Send the message

## To Respond to a Voting Message:

1. Click on the ***InfoBar*** in the Reading pane

2. Select the desired voting option

3. Select ***Send the response now*** or ***Edit the response before sending***

4. Click on **[OK]**

## To Review the Voting Responses:

1. Click on ***Sent Items***

2. Double-click on the original voting message

3. Click on ***Tracking*** in the ***Show*** group

## To Set Up an Automatic Response Message:

1. Click on the ***FILE*** tab, then click on **[Automatic Replies]**

2. Click on ***Send automatic replies*** and specify a timeframe

3. Type the text for internal and external messages

# Chapter 8: Appointments and Events

## To Schedule an Appointment:

1. Click on a blank timeslot

2. Type the desired appointment subject

3. Drag the top or bottom border to change the start or end time

## To Create an Appointment:

1. Double-click on the desired timeslot

2. Enter the appointment details

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

## To Reschedule an Appointment to Another Day:

1. Double-click on the appointment

2. Click on the drop arrow for ***Start time*** and select the desired day

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

## To Reschedule an Appointment to Another Time:

1. Click on the appointment to select it

2. Drag it to the desired start time

## To Create a Recurring Appointment:

1. Create an appointment

2. Click on ***Recurrence*** in the ***Options*** group on the ***CALENDAR TOOLS: APPOINTMENT*** tab

3. Complete the details, click on **[OK]**, then click on ***Save & Close***

## To Change All Recurring Appointments in a Series:

1. Double-click on the recurringappointment

2. Click on ***Open the series*** and then click on **[OK]**

3. Make the desired changes

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

## To Schedule an Event:

1. Create a new appointment in the ***Appointment*** window

2. Enter the desired details

3. Tick ***All day event***

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

## To Schedule Free and Busy Time in the Calendar:

1. Create a new appointment in the ***Appointment*** window

2. Click on the drop arrow for ***Show As*** and select ***Free***, ***Tentative*** or ***Out of Office***

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

## To Categorise an Activity:

1. Create a new appointment in the ***Appointment*** window

2. Click on ***Categorise*** in the ***Options*** group and select the desired category

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

## To Print Your Appointments:

1. Display the desired period

2. Choose the appropriate view

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

4. Click on **[Print]**

## To Delete Appointments or Events:

1. Click on the appointment or event

2. Click on ***Delete***

# Chapter 9: Scheduling Meetings

## To Schedule a Meeting:

1. Click on a blank timeslot in the calendar, then click on ***New Meeting***

2. Click on **[To]**, double-click on the desired names, then click on **[OK]**

3. Type the details and click on ***Send***

## To Respond to a Meeting Request:

1. Double-click on the meeting request

2. Click on ***Accept*** (or other tool in the ***Respond*** group as desired)

3. Click on the appropriate response

## To Track Meeting Responses:

1. Double-click on the meeting response in your ***Inbox***, or

Click on the meeting, then click on ***Tracking*** in the ***Attendees*** group

## To Change a Meeting:

1. Double-click on the meeting in the calendar

2. Make any necessary changes

3. Click on ***Send Update***

## To Add or Remove Attendees From a Meeting:

1. Double-click on the meeting in the calendar

2. Click on ***Add or Remove Attendees*** in the ***Attendees*** group

3. Click on ***Send Update***

4. Select the desired option, then click on **[OK]**

## To Prevent Meeting Responses:

1. Create a meeting request

2. Click on ***Response Options*** in the ***Attendees*** group

3. Remove the tick from ***Request Responses***

4. Click on ***Send***

## To Cancel a Meeting:

1. Click on the meeting in the calendar

2. Click on ***Cancel Meeting*** in the ***Actions*** group

3. Click on ***Send Cancellation***

## To Use the Scheduling Assistant:

1. Create a meeting request, then click on ***Scheduling Assistant*** in the ***Show*** group

2. Click on **[Add Attendees]**, determine the best time for the meeting and click on ***Send***

## To Create a Calendar Group:

1. Click on ***Calendar Groups***

2. Select **Create New Calendar Group**

3. Type a ***Name*** and click on **[OK]**

4. Select the people and click on **[OK]**

# Chapter 10: Managing Contacts

## To Add a Contact From an Email:

1. Open the message in the Reading pane

2. Right-click on the contact’s email address in the header region

3. Select **Add to Outlook Contacts**

4. Click on **[Save]**

## To Pin a Contact to Your Favourites:

1. Right-click on the desired contact in the alphabeticallist in ***People*** view

2. Select **Add to Favourites**

## To Contact a Person From Their People Card:

1. Click on the desired contact in ***People*** view

2. Click on the appropriate link in their people card

## To Contact a Person From the People Peek:

1. Point to ***People*** in the ***Navigation*** bar

2. Point to the desired contact

3. Click on the required communication icon or click on the arrow to open the contact card

## To Forward a Contact:

1. Click on the contact

2. On the ***HOME*** tab, click on ***Forward Contact*** in the ***Share*** group

3. Select **As an Outlook Contact** or **As a Business Card**

## To Create a Contact Group:

1. Click on ***New Contact Group*** in the ***New*** group

2. Type a ***Name***

3. Click on ***Add Members*** in the ***Members*** group and add the contacts

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

## To Use a Contact Group:

1. Create a new mail message

2. Click on ***To***

3. Double-click on the contact group and click on **[OK]**

4. Complete and send the message

## To Use Part of a Contact Group:

1. Create a new mail message

2. Click on ***To***, double-click on the contact group and click on **[OK]**

3. Click on the ***expand*** (+) icon and delete the unwanted members

4. Complete and send the message

## To Delete a Member From a Contact Group:

1. Double-click on the contact group in people mode

2. Click on the desired name, then click on ***Remove Member*** in the ***Members*** group

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

## To Link Contacts:

1. In ***People view***, click on a contact in the middle pane

2. Click on ***Link Contacts*** under ***View Source***

3. Start typing the name

4. Click on the contact, then click on **[OK]**

# Chapter 11: Task Requests

## To Create a Task Request:

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

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

3. Click on ***Assign Task*** in the ***Manage Task*** group

4. Enter the desired task and recipient details

4. Send the message

## To Accept a Task Request:

1. Double-click on the ***Task Request*** message in your Inbox

2. Click on ***Accept*** in the ***Respond*** group

3. Click on **[OK]**

## To Complete a Task Request:

1. Click in the white checkbox to the left of the task request in the ***Tasks*** list, or

Click on the task in the ***Tasks*** list and click on ***Mark Complete***

## To View an Updated Task Request:

1. Double-click on the ***Task Completed*** email message in your ***Inbox*** to view the status report

2. Click on the InfoBar and select **Open Original Flagged Message** to view the updated task