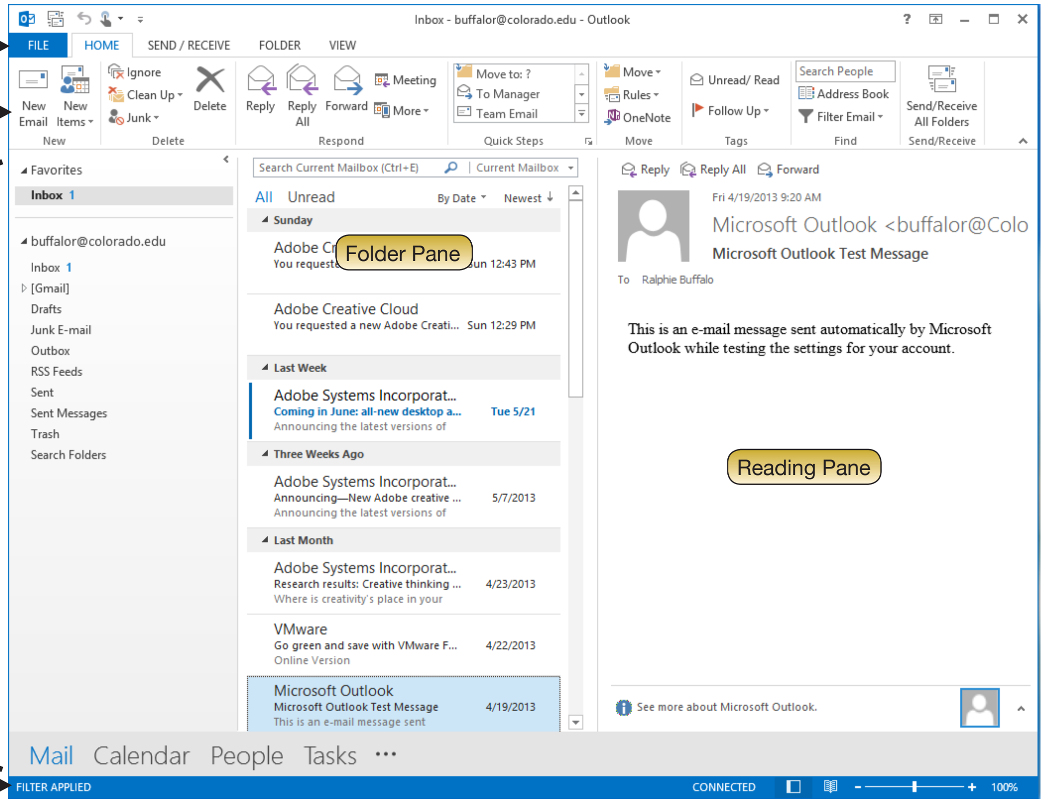
University of Colorado
Boulder

Outlook 2013
Quick Reference Guide

THE OUTLOOK 2013 SCREEN



Displays Navigation Tools for Outlook Mail, Calendar, or Contacts.

To switch functions, click the options at the bottom.

MAIL: Basic Tasks

To Create a New Message:

- *On the Standard toolbar, click* ***New E-mail****.*
- *Enter one or more e-mail addresses in the* **To: (Cc:)** *box, or click* ***To...*** *(****Cc****...) to search the Address Book.*
- *Enter the subject of the message in the* ***Subject:*** *box.*
- *Enter the text of your message in the text box.*
- *Click* ***Send****.*

To Attach a File:

- *While composing a message, click the Home tab on the Ribbon. Select* ***Attach File*** *from the Include group. Select the file you want to send, and click* ***Insert.***

To Open an Attachment:

- *Double-click the attachment at the top of the Reading Pane.*

To Save an Attachment:

- *Open the email by double clicking on it. Click the Message tab on the Ribbon. Select* ***Other Actions*** *from the* **Actions** *group. Click on* ***Save Attachments****. Select the location where you want to save the attachment and click* ***Save****.*

To Create a Folder:

- *From the Folder tab on the Ribbon, click* ***New Folder****. Name the Folder, define what the folder contains, and click* ***Ok****.*

To Open a Message:

- *Open the Inbox. Click on a message to preview it or double-click to open.*

To Move a Message into a Folder:

- *Messages can be dragged from the Inbox and dropped in other Folders.*

To Group/Sort Messages:

- *In the Navigation Pane, select the Folder to group/sort. In the Folder Pane, click the* ***Arranged By:*** *title bar and select the arrangement criteria.*

To Check for New Messages:

- *Outlook is set to automatically check for new messages. To manually check for message, click the* ***Send/Receive*** *button from the Send/Recieve tab on the Ribbon.*

To Print a Message:

- *Double-Click the message that you would like print. Under the* ***File*** *tab in the Message Ribbon, select Print from the side bar and then click* ***Print****.*

To Delete a Message:

- *Select the message and click* ***Delete*** *or press* ***Delete*** *on your keyboard. This will move the message to the* ***Deleted Items*** *folder. To empty the Deleted Items folder right-click it and then click* ***Empty Folder****.*

To Reply/Reply All:

- *Highlight the message to be replied to, click* ***Reply*** *or* ***Reply All****, type your reply, and click Send.*

To Forward a Message:

- *Highlight the message to be forwarded, click* ***Forward****, enter the email addresses in the* ***To:*** *box, type any comments in the text box, and click* ***Send****.*

To Send a Blind Carbon Copy (Bcc):

- *While composing a message, click* ***Options*** *on the Ribbon. Click the* ***Bcc*** *button. A new row labeled "BCC" appears under the CC: area.*

Message Indicators:

Message has not been read
Message has been read
File is attached to the message
Message has high or low priority

The Ribbon

Outlook 2013

Quick Reference Guide

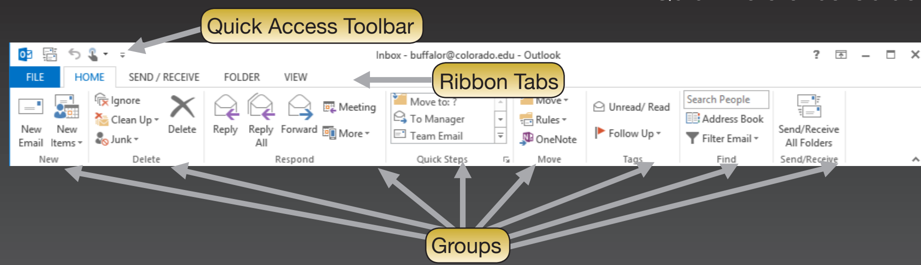
Customizing the Ribbon:

You CAN'T:

- Add, rearrange, or remove commands
- Change or remove groups

You CAN:

- Minimize the Ribbon
- Customize the Quick Access Toolbar (click the down arrow to the right of the Toolbar, then select More Commands)



MAIL: Advanced Tasks

To Save a Message as a Draft:

- *While composing a message, click Save on the Quick Access Toolbar. The message appears in the Drafts folder.*

To Resend a Message:

- *Double-click to open the message in the **Sent Items** folder. Click on the **Actions** menu from the **Move** group and click **Resend This Message**.*

To Change Message Options:

- *While composing a message, click the **Options** tab on the Ribbon. Select the **More Options** down arrow. Here, you can specify:*
  - Level of Importance
  - Receipt Notifications
  - Reply-to address
  - Voting Buttons
  - Delivery Delay
  - Color Category

To Create a Signature:

- *When composing a message click the **Signature** button. Click **New** from under the E-mail Signature tab. Type a name for your signature and click **OK**. In the Edit Signature box type what you would like your signature to read and then click **OK**. This will now be the signature on your e-mails.*
- *To use a different signature select a different signature from the Select Signature to Edit box and then click **OK**.*

To Categorize a Message by Color:

- *Right-click the message in the Folder Pane, select Categorize from the contextual menu, and select a Color Category.*

To Rename the Color Category:

- *Click **Categorize** on the Standard toolbar, and select **All Categories**. Select the checkbox next to the color to be renamed. Click **Rename**, and type in the new name.*

To Create a Search Folder:

- *Under the Folder Tab on the Ribbon click New Search Folder. Select a search condition and complete the Customize Search Folder field if necessary. Click OK. Click the new Search Folder to see the retrieved messages.*

To Create a Contact Group:

- *On the Standard Toolbar click on the **New Items** drop-down menu and then select **Contact Group** from the **More Items** list. To add contacts click the **Add Member** button and choose where you would like to add the contact from. Within this new window highlight the contact then click **Members ->**. When you have added all contacts click **OK**. If you are content with this contact group click **Save & Close**.*

To Send to a Contact Group:

- *While composing a message, click To. Your Contact Groups will appear in the Contacts Address book. Select the group, and click To, Cc, or Bcc.*

To Edit a Contact Group:

- *From the Find group select **Address Book**. Select the "Contacts" address book. Double click the desired Contact Group. Use **Add Members** and **Remove Member** from the Members Group on the Ribbon to edit the group. Click **Save & Close** from the Actions group when done.*

Flag a Message as a To-Do Item:

- *Select the message in the Folder Pane, click the **Follow Up** button on the Standard toolbar, and select a flag.*

To Clear a Flagged Message:

- *Right-click the message in the Folder Pane, select Follow Up from the contextual menu, and select **Clear Flag**.*

CREATING A VACATION MESSAGE

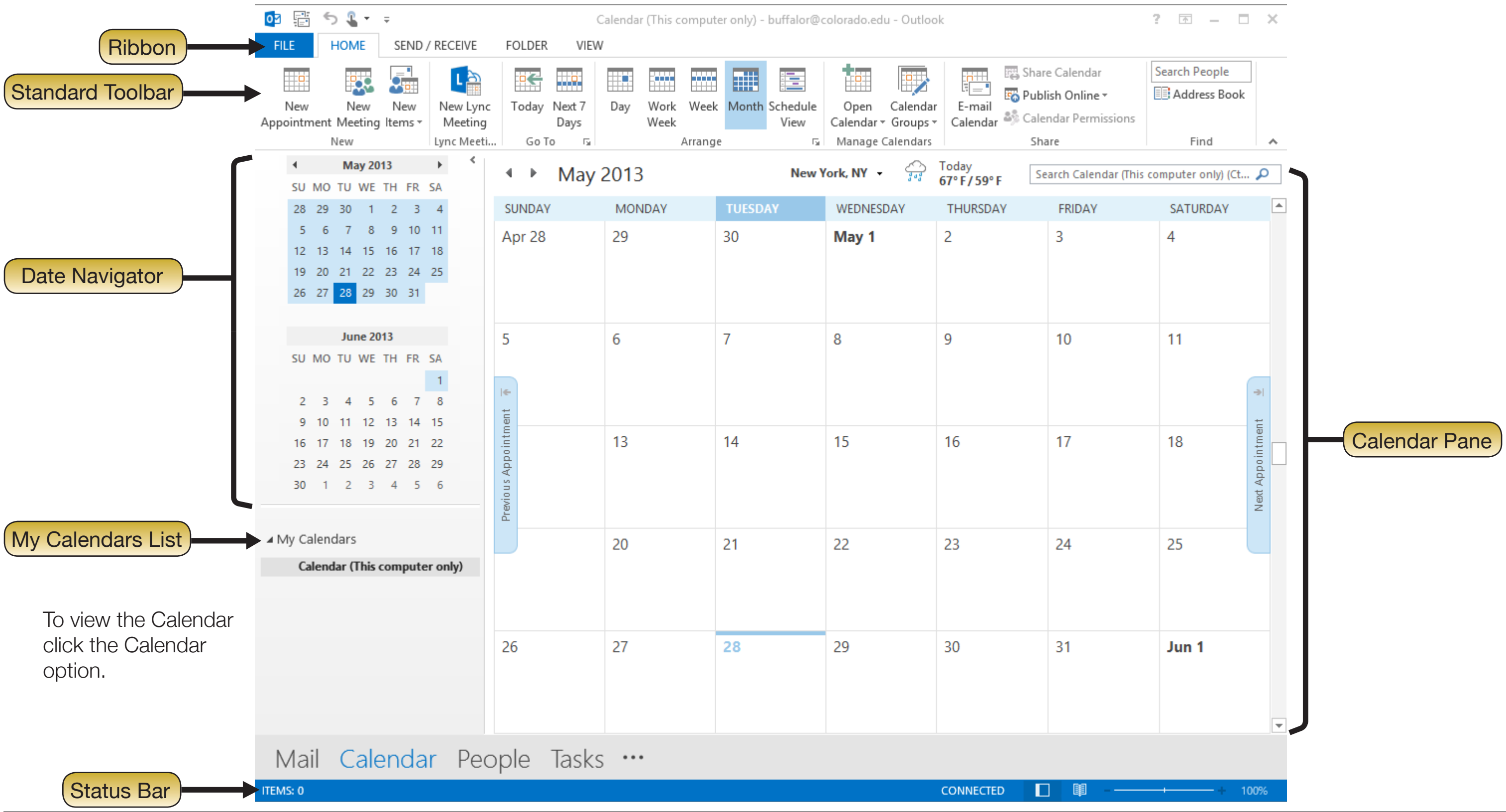
Creating a Vacation Message:

- *From the **File** tab in the Ribbon click **Automatic Replies**.*
- *To turn ON: select **Send Out of Office auto-replies**.*
  - Auto-replies begin immediately unless you specify Start / End dates.
  - The **Inside My Organization** tab: Type the message to be sent.
  - The Outside My Organization tab: This message is optional. If you would like to send it, create the message AND
    - Activate by clicking **Auto-reply to people outside my organization.**
    - Select recipients: **My Contacts only** or **Anyone outside my organization.**
- *To turn OFF: select **Do not send Out of Office auto-replies.***

SPAM CONTROLS

Controlling SPAM:

- *In order to reduce the number of false positives, OIT recommends that you allow the Email Server to filter your email instead of using the spam filters available on individual mail clients.*
- *To do this, you must turn off the spam filters in your mail client which are set to "On" by default.*
  - From the Junk menu from the Delete group select **Junk E-mail Options**...
  - In the Junk E-mail Options dialog, Options tab, click to select **No Automatic Filtering > Ok**.



To view the Calendar click the Calendar option.

CALENDAR: Basic Tasks

To Create an Appointment:

- *Click on the* ***New Appointment*** *button or double-click anywhere in the Calendar to get a new Appointment Window. (shown to the right)*
  - o Enter a Subject and Location for the Appointment.
  - o Select Start and End times.
  - o Add related information in the text box.
  - o Click **Save & Close** in the Actions group on the Ribbon.

To Delete an Appointment:

- *Click the Appointment in the Calendar Pane, then click* ***Delete*** *on the Standard toolbar.*

To Color Code an Appointment:

- *Click the Appointment in the Calendar Pane, click* ***Categorize*** *in the Standard Toolbar, and select a Category.*

To Change the Length of an Appointment:

- *Hover the cursor over the top or bottom edge of an Appointment in the Calendar Pane. When a double arrow appears, click and hold the left mouse button, drag the edge to the desired time. Or, double click the Appointment and change the Start or End time.*

To Change Date/Time of an Appointment:

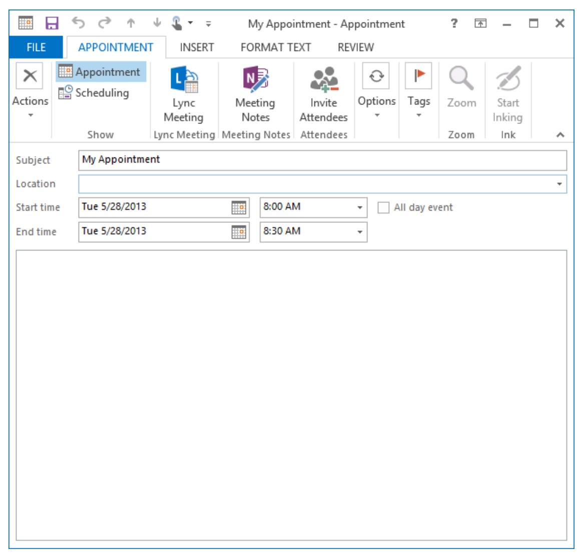
- *Click on any part of the Appointment in the Calendar Pane except the top or bottom edge. Hold down the left mouse button and drag the Appointment to the desired date/time. Or, double click the Appointment, and change the Start and End dates/times.*

To Create a New Calendar:

- *From the Open Calendar menu in the Manage Calendars group select* ***Create New Blank Calendar...*** *Give the new Calendar a name such as Personal, Resource, Seminars, etc. Click* ***OK***. *The new Calendar appears in your My Calendars list in the Navigation Pane.*

To View Different Dates:

- *Click on the desired date in the Date Navigator. The new dates appear in the Calendar Pane.*



To Go to Today:

- *In the Standard Toolbar click* ***Today.***

To Change Dates Displayed in Date Navigator:

- *Click the arrows to either side of the month at the top of the Date Navigator.*

To Change Views:

- *Click* ***Day***, ***Week***, *or* ***Month*** *located above the Calendar Pane for different views of your Calendar.*

View Multiple Calendars:

- *Click on the checkbox next to the calendars you would like to view in your My Calendars list. The Calendars will appear side by side in the Calendar Pane.*

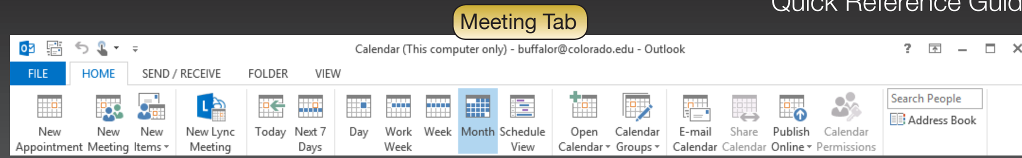
The Calendar Ribbon

Meeting/Appointment Windows

Outlook 2013

Quick Reference Guide

In the Appointment and Meeting windows, the Ribbon will show Meeting related actions.



MAIL: Advanced Tasks

Create a Meeting Request:

- *Click the **New Meeting** button from the Standard toolbar, or click the **New Appointment** button and then click on **Invite Attendees**.*
  - **Set up:** Fill in the Subject, Location, Date and Time.
  - **Invite Guests:** Click **To:** above the Subject line. Choose an Address Book. Entries from that Address Book appear in the data box. Select a name from the list. To choose multiple names, hold down the CTRL key while selecting. Click **Required** or **Optional** to add the selected names to that group. Click **OK**.
  - **Additional Information:** If desired, add additional information by typing in the text box or attaching files, business cards, tables, or illustrations from the Insert Tab.
  - **Request an RSVP:** If desired, click **Response Options** in the Attendees group. Toggle on/off **Request Responses**.
  - **Send:** Click **Send** to send the invitation to the Invitees.

To View Invitee Schedules:

- *To find times when everyone is available, add Invitees to the Meeting as described above. Click **Scheduling** Assistant in the Show group of the Ribbon.*
  - Use the scroll bar under the Attendee list to view different dates.
  - An Attendee's row will be blocked when they are NOT available.
  - Adjust Start/End times at the bottom of the Scheduling window.
  - When finished, click **Appointment** in the Show group of the Ribbon to return to the Meeting details.

To Add/Delete Guests:

- *Double click the Meeting to open it. Click **Add or Remove Attendees** in the Attendees group of the Ribbon. Invite additional guests as described above. Remove guests by deleting them from the Required, Optional or Resource lines. Click **OK**.*

To Cancel a Meeting:

- *Open the meeting by double clicking it. Click **Cancel Meeting** in the Actions group, then click **Send Cancellation.***

To Reschedule or Update a Meeting:

- *Double-click the Meeting, make your changes, then click **Send Update.***

To Respond to a Meeting Request:

- *Meeting Requests arrive in the Mail Inbox. Double click the Meeting Request to open it. Click on one of the Responses located at the top of the request. Click **OK**.*

To Track Response:

- *Requesting an RSVP for a Meeting Request, allows tracking Invitee responses. Double click the Meeting to open it. Click **Tracking** in the Show group to see who has responded. Click Appointments in the Show group to return to the Meeting details.*

To Create a Tentative Meeting:

- *Create a meeting as usual. Before sending, click the down arrow near **Show As:** in the Options group. Select **Tentative**. Complete and Send the Meeting Request. The Meeting will appear with a striped border in the Attendees' calendars until the Tentative option is removed.*

To Create Recurring Meetings:

- *While creating a Meeting, click **Recurrence** in the Options group. Complete the Recurrence dialog box, and click **OK**. Complete and Send the Meeting Request.*

To Share Your Calendar:

- *Click on the **Share Calendar** link from the Share group. A Sharing e-mail will open.*
  - Click one or both checkboxes: **Allow recipient to view your Calendar** and/or **Request permission to view recipient's Calendar**.
  - Click **To:** to select recipient(s). Click **Send**.

To View Shared Calendars:

- *Once granted permission to see a Shared Calendar, that Calendar will appear in your My Calendars List in the Navigation Pane. Click on the Shared Calendar to view it.*

CONTACTS

To View Your Contacts:

- *In the Navigation Pane click **Contacts**.*

To Create a New Contact:

- *From the New Items menu select **Contact**, or from within the Contact section click **New Contact**.*

To Edit a Contact:

- *Double-click the contact.*

To Find a Contact:

- *Type words to search for in the Find a Contact box.*

To Delete a Contact:

- *Select the contact and press the **<Delete>** key.*

TASKS

To View a Task:

- *Your Tasks for each day appear in the Task Pane of your calendar. Double-click the task to view the details.*

To Work with Tasks:

- *Click **Tasks** in the Navigation Pane to enter Task View.*

To Create a New Task:

- *From the New Items menu select **Task**, or from within the Task section click **New Task**.*

To Complete a Task:

- *In Simple List view, check the task's check box.*

To Delete a Task:

- *Select the task and press the **<Delete>** key.*

To Create a Recurring Task:

- *Double-click the task and click **Recurrence** in the Options group on the Ribbon.*

To Assign a Task:

- *Double-click the task, click the **Assign Task** button in the Manage Task group on the Ribbon, enter the person's name in the **To** box, and click **Send**.*

IT Service Center
303-735-4357 (5-HELP) or help@colorado.edu