Introduction to Microsoft Outlook 2013
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A WORD ABOUT MICROSOFT OFFICE 2013

Office 2013 revolutionized the typing experience by upgrading several aspects of the creating process. Since Microsoft’s new Windows 8 operating system already adopted a whole new style (called “Metro”), this version of Office does the same thing. The startup screens and interface all look a little “flatter” and sparse. You will also notice that when you open FILE you’ll see a colored menu (for example, Outlook is dark blue) that will give you a list of options (like changing themes and color). Lastly, since the world is looking to go “cloud-based,” all the features of Office adopt that philosophy and make it easier to store to the Cloud.

NEW FEATURES IN OUTLOOK 2013

When you open Outlook 2013, the first thing you will notice the brand new look that is cleaner and also designed to help you focus on what’s important with a clear view of e-mail, calendars and contacts.

THE INBOX

Organizational techniques have also changed within Outlook 2013, especially in the way you can see what e-mails messages you have read or haven’t read. In Outlook 2013, there’s a big, easy-to-spot Unread button right at the top of your inbox. Click it and presto: you see only those messages marked as unread. To go back to the full inbox view, just click the All option right next to it.

You can also customize your inbox by renaming the folders in your inbox and move them around to support the way you work. To do this, you can set up one place for all your project documents and e-mail in Site Mailboxes by simply giving everyone in your team access to a team folder, calendar and task list to manage on the go (this utilizes Outlook, Exchange and SharePoint).

Lastly, Outlook 2013 has upgraded from their traditional message previewing system. In the past, the Outlook inbox has shown you the sender’s name and subject line for each e-mail and would have to double click the e-mail to see the actual contents. Outlook 2013 offers message preview that is accessible in the View tab), which lets you preview one, two, or three lines of the message body right inside the inbox. You can also reply or forward an e-mail right in the preview pane without having to reach for the ribbon.
The attachment reminder is a new concept to Outlook 2013 because Outlook can now warn you when it appears you have forgotten to include an attachment referenced in the body of your message. It may be small, but if you’re a person that constantly forgets to include attachments, this feature is important and helpful.

Response time is also quicker to e-mail messages by inline replies, which you can reply with one click by typing your response right in the Reading Pane.
The Ribbon was first introduced in some of the Office 2007 programs and is now common to all Office 2013 programs. The Ribbon extends across the top of the program window, which is directly under the title bar and consists of a set of tabs that change depending on the currently active module, item, or content. Clicking a tab name displays the associated set of commands.

BACKSTAGE VIEW

The File tab displays the Backstage view, a feature that was first introduced in 2010, that is common with all Office programs. The contents of the Backstage view are identical regardless of which module you’re working in.
• **Info:** from this page, you can manage account settings, automatic replies, mailbox size, rules, and alerts.

• **Open & Export:** from this page, you can open an external calendar file, Outlook data files, or other Outlook user’s folder in Outlook, and you can import and export files and settings into Outlook.

• **Save As:** this gives you the option to save an e-mail or e-mails.

• **Save Attachments:** this gives you the option to save attachments to e-mails.

• **Print:** From this page, you can select a printer, set print options, and preview the effect of the applied options, then print the selected items.

• **Office Account:** here you can select the color and design of what you want your Office interface to look like with backgrounds (for example, calligraphy or stars) and themes (white, gray or dark gray). You can also add apps, visit the Office store and view storage here.

• **Options:** from this page you can customize your Outlook and various default settings such as font, spell check, and calendar, to name a few.

**STANDARD TABS**

Tabs have replaced the standard menus and toolbars. Each tab has a set of tools specific to that tab’s functionality. The ribbon in each module includes four standard tabs: Home, Send/Receive, Folder and View. Tabs contain Groups, an area of a ribbon tab containing buttons related to a specific function. Outlook 2013 gives you the option to customize these tabs. In the bottom right corner of some of the tabs are little arrows known as Option Clicks. These Option Clicks open dialog boxes that give you more options to choose from.

**Home Tab:** this tab includes the commands you need to create and manage e-mail messages, but not message content.

• **Ignore:** this command moves the selected conversation and any related messages you receive to the Deleted Items folder.

• **Clean Up:** this command deletes redundant messages, messages whose text is wholly contained with later messages from a conversation.

• **Quick Steps:** this command allows you to perform multiple processes on one or more e-mail messages with only one click. For example, you can reply to an e-mail message and delete the original message or move a message to a specific folder. You can customize Quick Steps to include any combination of up to 12 actions that you choose.

**Send/Receive Tab:** this tab includes commands for synchronizing data in Outlook with data on the mail server.

• **Send/Receive All Folders:** this command refreshes your inbox with the mail server.
**Folder Tab:** this tab includes commands for creating and managing folders in which you can store messages, calendar items, contact records, notes, tasks, and other Outlook items.

- **New Folder:** this command allows you to create a new folder in the Navigation Pane.
- **New Search Folder:** this command allows you to create a new Search Folder. A search folder displays messages based on specified criteria (i.e. read messages or unread messages).
- **Clean Up Folder:** this command allows you to remove redundant messages from every conversation in the selected folder.
- **Delete All:** this command allows you to delete all of the items in the selected folder.
- **Recover Deleted Items:** this command allows you to recover deleted items from this folder.

**View Tab:** this tab includes commands for changing the way items are displayed in the content pane. For example, displaying, hiding, or changing the location of a program window pane, as well as opening or closing secondary program windows.

- **Change View:** this command gives you several view options for the selected folder.
- **View Settings:** this command allows you to change the font size of the columns, rows, and auto preview of the selected folder. Click on View Settings and select Other Settings from the list. Click on Column Font and select a font and size, click OK. Click on Row Font and select a font and size, click OK.
- **Arrangement Group:** this group gives you the ability to arrange your folder according to date, from, categories, etc.
- **Layout Group:** this group allows you to view and change options within the Navigation Pane, Reading Pane and To-Do Bar.

**Minimize the Ribbon Button:** this button is located below the Minimize/Maximize/Close buttons.

Clicking this button hides the commands, but leaves the tab names visible. You can then click any tab name to temporarily display its commands. Clicking anywhere other than the ribbon hides the commands again. When the full ribbon is temporarily visible, you can click the button at its right end, shaped like a pushpin, to make the display permanent.
**THE MESSAGING RIBBON**

**Message Tab:** this tab includes a selection of the commands you are most likely to use when creating a new message.

- **Basic Text Group:** within this group you can format the text of the e-mail with many of the same tools that you can find in Microsoft Word.
- **Names:** this group gives you address book and check names, which makes sure that the e-mail address is correct.
- **Include:** this group gives you the option to attach a file and a signature to your message. You can also create a new signature or edit an existing signature.

**Insert Tab:** this tab includes commands that allow you to insert files, a signature, tables, images, symbols, and more.

**Options Tab:** this tab includes commands showing the CC and BCC fields in the message header of an e-mail. It also gives you the option for tracking an e-mail, such as requesting a Delivery Receipt or a Read Receipt.

**Format Text Tab:** this tab includes many text formatting options found in Microsoft Word. You have the option to find, replace, select, cut and paste text.

**Review Tab:** this tab includes commands for proofing such as checking spelling and grammar.
QUICK ACCESS TOOLBAR

The Quick Access Toolbar (QAT) is a toolbar that displays frequently used commands. You can add commands that are available regardless of which tab is currently active in the Message window. Adding a command to the QAT in a new message window does not add it to the QAT of any other Outlook item window or any other Microsoft Office 2013 program window.

Placing buttons on the Quick Access Toolbar:

1. Click on the Customize Quick Access Toolbar button at the right end of the QAT and a list of commands will display.

2. A check mark indicates a command that is already displayed on the QAT.

3. Clicking a command that is not already preceded by a check mark adds that command to the right end of the QAT.

4. To see a list of all the available commands that can be added to the QAT, click on More Commands.

“The quality of a person’s work is in direct proportion to the amount of time taken to perform it.”

Please follow...
5. Select an item in the left column, click on Add and it will appear in the right column.
6. To remove an item from the QAT, select it in the right column and click on Remove.
7. You can also change the order of how these items appear on the toolbar. Select the item in the right column and click on the Up arrow located on the right to move the item up or click on the Down arrow to move the item down.
8. To change the location of where the QAT appears on the ribbon, click on the Customize Quick Access Toolbar button at the right end of the QAT.
9. Click on Show Below the Ribbon and the QAT will be moved below the ribbon. Follow the same steps to move the QAT to above the ribbon.
CUSTOMIZING THE RIBBON

The ribbon was designed to make all the commonly used commands visible so that users could discover the full potential of the program more easily. Many people use Outlook to perform the same set of tasks all the time and find the ribbon to be cluttered with commands and groups that they don’t use. Outlook 2013, like 2010, offers the option for users to customize the ribbon to suit their needs.

Follow these steps for a demonstration on how to customize the ribbon.

1. Open the Outlook Options dialog box by clicking on the File tab. Select Options and click on Customize Ribbon.
2. In the right pane of the Customize Ribbon page, clear the check boxes of the Folder tab, the Add-Ins tab, then click OK.

3. The ribbon now displays only the File, Home, Send/Receive and View tabs. Note you cannot turn off the File tab, which is your link to the Backstage View.
4. Redisplay the Customize Ribbon page of the Outlook Options dialog box, and in the right pane select the Folder check box. Then click the plus sign adjacent to Folder to display the groups that currently appear on this tab.
5. In the Choose Commands From list click on the down arrow next to Popular Commands and click on Main Tabs. Then in the list of available commands, click the plus sign adjacent to Folder to display the groups that are predefined for this tab.

6. In the right pane, click the IMAP group. Between the left and right panes, click Remove. The IMAP group is removed from the list of groups that are present on the tab (the pane on the right), but it is still present in the available commands list. You can add it back to the folder tab, or add it to a different tab at any time.
7. Click the plus sign adjacent to Home (Mail) to display the groups that currently appear on the Home tab in the Mail module. Then click the tab name, Home (Mail).

8. Below the right pane, click New Group. A group named New Group (Custom) is added to the bottom of the Home (Mail) group.
9. With the new group selected, click Rename. The dialog box for groups opens. In the Rename dialog box you can select a symbol to represent the group and change the group name.
10. In the Rename dialog box, enter Blog Friends in the Display name box and click OK. Then on the right side of the Customize Ribbon page click the Move Up button until the Blog Friends (Custom) group is at the top of the groups list. Since it is the first on the list, the custom group will appear at the left end of the Home tab. You have removed a standard group from the Folder tab and created a custom group on the Home tab of the Mail module.
11. In the Choose Commands From list click the File Tab. The available commands list changes to include only the commands that are available in the Backstage View, which you display by clicking the file tab.

12. In the file tab commands list, click Empty Deleted Items. Then between the left and right panes click Add. Repeat this step with the Mailbox Cleanup command. The two commands are added to the custom group.

**Note:** you can add commands to a custom group but not to a predefined group.
13. In the right pane, remove the Respond and Tags groups from the Home (Mail) tab. Select the item and then click on Remove between the left and right panes.

14. Click the tab name, Home (Mail) and then click New Tab. A custom tab includes custom group named New Group (Custom).

15. Remove the custom group from the custom tab. Click on New Group (Custom) and click on Remove.
16. Click the tab name, New Tab (Custom) and click Rename. The Rename dialog box for tabs opens. You can’t assign a symbol to represent a tab.

17. In the Rename dialog box enter Follow Up in the Display name box and then click OK.
18. In the Choose Commands From List click Main Tabs and then in the available commands list expand the Home (Mail) tab.
19. Select the Follow Up (Custom) tab in the right pane. Add the Respond and Tags groups from the Home (Mail) groups on the left pane.
20. Click OK. The new Blog Friends group is at the left end of the Home tab, and the new Follow Up tab appears on the ribbon after the Home tab.

21. Display the Customize Ribbon page of the Outlook Options dialog box. In the lower-right corner, click Reset → Reset all Customizations. A message box will appear asking you to confirm that you want to delete all ribbon and QAT customizations, click Yes.
22. Click OK. The default ribbon is restored.

QUICK STEPS

Outlook 2013, like Outlook 2010, includes many features designed to increase the efficiency with which you perform tasks. With the Quick Steps feature available in the main Mail ribbon, you can perform multiple processes on one or more e-mail messages with only one click. For example, you can reply to an e-mail message and delete the original message, or flag a message for follow-up and move it to a specific folder. Quick Steps can include any combination of up to 12 actions that you choose.

Quick Steps are available from the Quick Steps group of the Home tab of the Mail ribbon and from the shortcut menu that appears when you right-click a message or a group of messages.
The default Outlook installation includes these five Quick Steps:

- **Move To:** moves the selected message to a folder that you specify the first time you use the Quick Step and marks the message as read. After you specify the folder, the Quick Step name changes to include the folder name.

- **Team Email:** creates a message to a person or people you specify the first time you use the Quick Step. You can edit the Quick Step to include CC and BCC recipients, a specific message subject, a follow-up flag, a level of importance, specific message text, and to automatically send the message one minute after you click the Quick Step command.

- **Reply and Delete:** creates a response to the original message sender and immediately deletes the original message.

  **NOTE:** The Reply & Delete Quick Step deletes the original message before you send the reply. If you close the response message window without sending it, the original message will no longer be in your inbox. If you need to retrieve the message from your Deleted Items folder, locate the message in the Deleted Items folder and drag it back to your inbox.

- **To Manager:** forwards the selected message to a person or people you specify the first time you use the Quick Step. You can edit the Quick Step to include CC and BCC recipients, a specific message subject, a follow-up flag, a level of importance, specific message text, and to automatically send the message one minute after you click the Quick Step command.

- **Done:** moves the selected message to a folder that you specify the first time you use the Quick Step, marks the message as read, and marks the message as complete so that a check mark is displayed in the follow-up flag location.

HOW TO SET UP AND USE BUILT IN QUICK STEPS

Some generic Quick Steps require that you supply information the first time you use them.

1. On the Home tab in the Quick Steps gallery, click the down arrow and click New Quick Step, then Move to Folder. The First Time Setup dialog box for the selected command opens.
2. Click the Move to folder arrow and select a folder from the list. Once you selected the folder, the name changes in the Name box to the name of the folder you selected.

![First Time Setup dialog box](image1)

3. In the First Time Setup dialog box, click Options. The Edit Quick Step dialog box opens.

![Edit Quick Step dialog box](image2)
4. You can change the existing actions and add actions to the standard Quick Step. You can add Tooltip text that will appear when the mouse hovers over the Quick Step.
5. Click Save. In the Quick Step gallery, the Quick Step name changes to the folder name that you selected, in this case: May—Software Application Training Registration.
6. Select the message that you want to move to the folder in the Quick Step gallery. Click on the Quick Step command (one you just modified) and the message disappears from the message list.
7. In the Navigation Pane open the folder and you will see the message there.

CREATE A CUSTOM QUICK STEP

The following exercise demonstrates how to create a custom Quick Step.

1. On the Home tab, in the Quick Steps gallery, click Create New. The Edit Quick Step dialog box opens.

2. In the Name box, replace the selected temporary name with Department Messages. Click the Actions arrow to expand the list. The Actions list includes 25 actions in six sections: Filing; Change Status; Categories, Tasks and Flags; Respond; Appointment; and Conversations.
3. Scroll down the Actions list to see the available actions. Under Respond, please select New Message. The selection action appears in the Actions list and the information required to perform the action appears below it.
4. In the To box, enter your e-mail address. Then in the Actions list, which is under New Message, click Show Options. The list expands to display optional settings for the new message.
5. In the Flag list, click Flag for Recipients. The Flag Message dialog box opens. You can flag an outgoing message for the recipient to follow up.

6. You can select several Flag options by clicking on the arrow. For this exercise, please select No Response Necessary. In the BY box, set the days to 0. Click OK.

7. In the Text Box type the following: Quick Steps are easy and fun to use.

8. Select the Automatically send after 1 minute delay check box,

9. Below the existing New Message action, please click Add Action. A second Actions list appears. You can add more actions to the Quick Step by clicking an action in the list. However, the Quick Step you have created is one that doesn’t take action on an existing message; the other actions aren’t appropriate.

10. Delete this new action by clicking on the Delete button to the right of the new action. The second Actions list disappears from the dialog box.

11. You can add a shortcut key to this Action. Click on the down arrow and select CTRL+SHIFT+1.

12. In the Tooltip text box, please type: Send myself a message.

13. Click Finish and the new Quick Step appears in the Quick Steps Gallery.

14. Click on the Quick Step; you should receive your e-mail message in about a minute.
CONVERSATION VIEW

Conversation View is an arrangement of messages grouped by subject. All the messages with the same subject appear together in your inbox (or other message list) under one conversation header.

**NOTE:** Until you expand the conversation header, the entire conversation takes up only as much space in your inbox as a single message would.
WORKING IN THE CONVERSATION VIEW

First off, make sure you check the view you are in. If you are in compact view, you will not be able to group messages into conversations. To check the view, go to the View tab on the inbox ribbon, then Change View and make sure you select “Single.” Once that is done, you may proceed with the following on grouping your messages into conversations.

1. Click on the View tab and check Show as Conversations.

2. The following dialog box opens. You can choose to have this view displayed in this folder only or in all of your Outlook folders. Select your option.

3. **Ignore Conversation:** this command moves the selected conversation and any related messages you receive in the future directly to the Deleted Items folder. **Note:** Be cautious when using the Ignore Conversation command. Outlook identifies “conversations” based on message subjects. If you receive unrelated messages in the future that have the same message subject as the conversation that you’ve chosen to ignore, you won’t receive those messages.

4. **Clean Up Conversation:** this command deletes redundant messages, messages whose text is wholly contained within later messages, from a conversation. By default, Outlook doesn’t clean up categorized, flagged, or digitally signed messages. You can modify conversation clean-up settings on the Mail page of the Outlook options dialog box.
CLEANING CONVERSATIONS

1. Select the conversation you would like to clean up. Click on the down arrow next to Clean Up and select the command you would like performed. You have a choice to clean up this conversation, all redundant messages in the current folder, and all redundant messages in the current folder and its subfolders.

2. The following dialog box opens when you select Clean Up Conversation. Click Clean Up or click on Settings to change the default settings.

PRINTING

In Outlook 2013 you can print an e-mail right from the folder without opening it first. The print preview is visible from the Print command in the Backstage View.

1. Select an e-mail from your inbox, do not open it.
2. Click on the File tab.
3. Click print and the following page will appear.
4. Click the Actual Size button to display the message at 100 percent.
5. Click the One Page button to display one page at a time of a multi-page message.
6. Click the Multiple Pages button to display up to four pages at a time of a multi-page message.
7. Click the Print icon to print the message.