Microsoft®

Outlook 2013

Advanced Features - Quick Reference Guide

Customizing Outlook

Managing Accounts

To add or change **Email Accounts**, **Data Files**, **RSS Feeds**, **SharePoint Lists**, **Internet Calendars**, **Publish Calendars** or **Address Books**; click the File tab, click Account Settings and select Account Settings from the list. Make your changes and click Close.

Adding Fields to a View

To remove, add or create the fields your messages are viewed by; right-click any column heading and select Remove Column to remove fields you don't need, or select Field Chooser to add and create fields.

Click and drag the Field you want to add to the Column Heading bar.

NOTE: Just remember, the Field Chooser is not available in all views.

Creating Custom Views

To create a custom view; click the VIEW tab, click Change View and select Manage Views from the list.

Click Modify to change **Sorting**, **Filtering**, **Grouping** and **Field** options for current views, or create a new view by clicking New. Follow onscreen prompts and click OK.

Changing Default Options

To change default settings for how **Mail**, **People** (Contacts), **Calendar** and **Tasks** are setup, click the File tab and click Options. Make the changes you require and click OK.

Outlook Quick Steps

Click the Home tab and select a quick step from the gallery, or click the Dialog Box Launcher in the Quick Steps group to customize your own.

Creating and Using Folders

Add a new folder by clicking the Folder tab and then selecting New Folder.

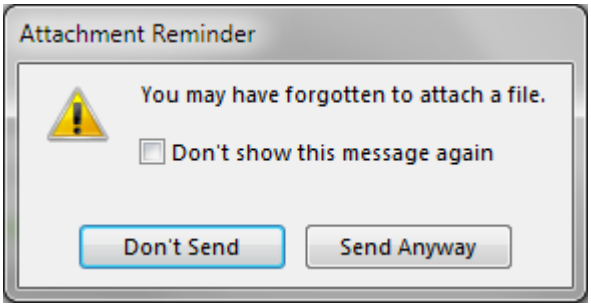
Name the new folder and then select the type of items you want to store in the new folder. Select the folder you want to add the new one to and click OK.

NOTE: If you don't want the new folder to be a sub-folder, remember to select the Mailbox folder at the top of the list.

Did you know?

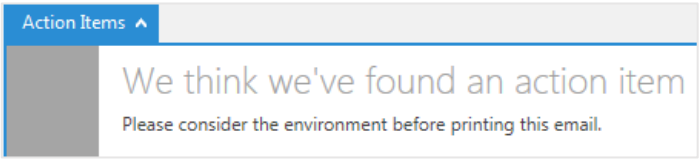
Attachments

If you have used the word "attached" anywhere in the content of your email, and you click Send, Outlook 2013 will automatically prompt you regarding the "missing" attachment, before allowing the mail to be sent.



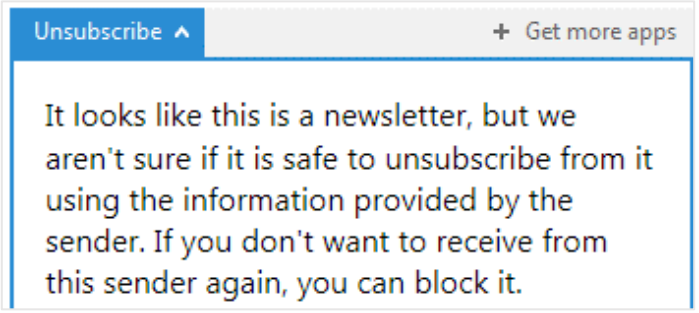
Action Items App

Outlook 2013 picks up on certain phrases in the content of messages, like "let me know" as potential Action items. Notifications of these appear at the top of the message and allow you to Follow up on or Mark them as Done.



Unsubscribe App

Outlook 2013 recognizes messages received from any email subscription feed and gives you the option to unsubscribe or block the sender from the source.



Sorting, Searching and Filtering

There are 3 ways to quickly find information in Outlook:

1. Use keywords, or phrases in the **Search Current Mailbox** field and press <Enter> or the button, to start the search.
2. Sort your messages by Fields like **Sender**, **Attachment**, **Subject** or **Categories**. Click the View tab and make your selection from the Arrangement group. Click More for more Fields.
3. Filter your messages by going to the folder you want to apply a filter to. Click the View tab, click View Settings and select Filter from the options available. Specify your criteria and click OK.

Information Technology Services
416.675.6622 X8888 | https://its.humber.ca

This document is available in an alternate format upon request.

Managing Outlook

Other Account Settings

- Automatic Replies: This is one of the features only available when using Outlook on Exchange Server. To setup an Auto Reply, click the File tab and on the Info tab, click Automatic Replies. Select the Send automatic replies radio button and set the dates and times you'd like the Automatic Replies to function, then click OK.
- Cleanup Tools: Click the File tab and on the Info tab, click Cleanup Tools and choose from Mailbox Cleanup, Empty Deleted Items Folder or Archive. If selecting Mailbox Cleanup, make the necessary adjustments and click Close.
- AutoArchive: Click the File tab, click Options, select Advanced from the list and click the AutoArchive Settings button under the AutoArchive section. Setup AutoArchiving according to your requirements and click OK.
- Importing and Exporting Data: Click the File tab, click Open & Export and select Import/Export from the list. You can import Contacts, Calendar items or other Outlook Data files. You can also export Outlook Data files if they're in a ".pst" (Personal Folders) format. Follow onscreen prompts to make your selections, and when you're done, click Finish.
- Personal Folders: Create a Personal Folder by clicking the Home tab, click New Items, point to More Items and select Outlook Data File from the list. Enter a name for the new data file and click OK.

Managing the Calendar

Collaborating with other Users

- Share your Calendar: To share your calendar with other users, click the Calendar link above the Status bar. Click Calendar Permissions in the Share group. Click Add and select the user/s you want to share your calendar with, click OK, and then click Apply when you're done.
- Manage Access to your Calendar: Click the Calendar link and click Calendar Permissions in the Share group. Select a user from the list and customize their access. Click OK when you're done.
- Open a Shared Calendar: Click the Calendar link. Click Open Calendar in the Manage Calendar group. Select Open Shared Calendar, type the name of the user and click OK.
- Taking and Tracking a Vote: Open a new Mail and click the Options tab. Click Use Voting buttons in the Tracking group. Users will be prompted to Vote using the Respond group. You can track the votes by clicking the Sent Items folder. Open the email you want to track votes for and click Tracking in the Show group.

Multiple Calendars

Create additional Calendars by clicking the Calendar link above the Status bar. Click Open Calendar in the Manage Calendar group. Select Create New Blank Calendar. Enter a name for the new calendar and click OK.

Customize Work Week

On the Calendar link, click the Dialog box Launcher in the Arrange group. Change the Work Week options according to your requirements and click OK.

Adding a Second Time Zone

Click the File tab, click Options, and then click Calendar. Under the Time Zone section, check the Show a second time zone check box. Enter a name for the new time zone and select a time zone from the Time zone drop-down list. Click OK.

Using the Journal

- Display the Journal: Click the Ellipsis (...) link above the Status bar. Select Folders and the Journal folder will now be listed in the Folder list.
- Creating a Journal Entry: Click the Journal folder. Click Journal Entry in the New group. Complete the entry and click Save & Close.

Using Notes

- View Notes: Click the Ellipsis (...) link above the Status bar. Select Notes.
- Create a new Note: View Notes and then click New Note in the New group. Type your note and click the Close button on the Note to save it.

Dealing with Junk Mail & Security

- Junk Mail Settings: Click the Home tab and click Junk in the Delete group. Select Junk E-mail Options from the list. Choose your options and click OK.
- Block Senders: Click Junk in the Delete group on the Home tab. Select Block Sender from the list.
- Add Safe Senders: Click Junk in the Delete group on the Home tab. Select Junk E-mail Options from the list. Click the Safe Senders tab and click Add to add contacts to your Safe Senders List.
- Security Settings: For other security settings, click the File tab. Click Options and select Trust Center. Click the Trust Center Settings. Adjust as necessary and click OK.
- International: Click Junk in the Delete group on the Home tab. Select Junk E-mail Options from the list. Click the International tab and select Blocked Top-Level Domain List or Blocked Encodings List to control messages received from International domains or in other languages.

Important Note

Some Advanced Features are only available when using Outlook in conjunction with Microsoft Exchange Server.

Outlook Web Access

Your Administrator will need to set this up for you. They will provide your company's Web App URL and your email password. Open your web browser and navigate to your organization's Outlook Web App page. Use your Email Address and Password to log in.

NOTE: If you're using a public area, remember to log off.

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