

Your easy, colorful,
SEE-HOW guide!



Plain & Simple

Microsoft Outlook 2013



Jim Boyce

Learn the simplest ways to get things done with Microsoft Outlook 2013

See it.
Learn it.
In color.

Here's WHAT You'll Learn

- Format and send messages, files, and photos
- Manage your contacts and social networks
- Control your email flow; limit junk mail
- Share your calendar; organize your schedule
- Tailor your inbox to best suit you
- Organize the data you keep in Outlook

Here's HOW You'll Learn It

- Jump in wherever you need answers
- Follow easy *steps* and *screenshots* to see exactly what to do
- Get handy *tips* for new techniques and shortcuts
- Use *Try This!* exercises to apply what you learn right away

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[Recommended]

Microsoft Office/
Microsoft Outlook



Microsoft

Outlook 2013 Plain & Simple

Jim Boyce

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*For my wife Julie, who continues to put up with me
for reasons known only to her.*

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Managing a calendar

The Microsoft Outlook 2013 calendar simplifies the burden of keeping and maintaining a schedule of meetings, appointments, events, and tasks. At a glance, you can quickly see your agenda in daily, weekly, or monthly views. With Outlook, you won't have any excuses for missing a lunch date or forgetting a meeting.

You can use Outlook to keep track of recurring meetings or events so that you don't have to manually enter these items each time they take place. For example, you might have a weekly staff meeting that takes place every Friday from 9:00 to 10:00 A.M. Make it a recurring meeting, and Outlook blocks out that day and time. Similarly, if your PTA meets every third Tuesday of the month at 7:00 P.M., you can set Outlook to schedule that meeting, as well.

Outlook includes an alert that displays a message prior to your calendar meeting, appointment, or task so that you won't forget it. For example, you can set up Outlook to display a reminder of an upcoming meeting two or three days before its occurrence. If you need to prepare a presentation, document, or other item for the meeting, you give yourself ample time to do so. You then can "snooze" the reminder so that it gets your attention again later, but perhaps only three hours prior to the meeting.

7

In this section:

- Viewing your calendar
- Using the To-Do Bar
- Adding appointments
- Adding and modifying events
- Adding meetings
- Modifying meetings and tracking responses
- Inserting Outlook items, documents, and Excel objects into calendar items
- Attaching a file or document to a calendar item
- Sharing calendar information
- Printing calendars

Viewing your calendar

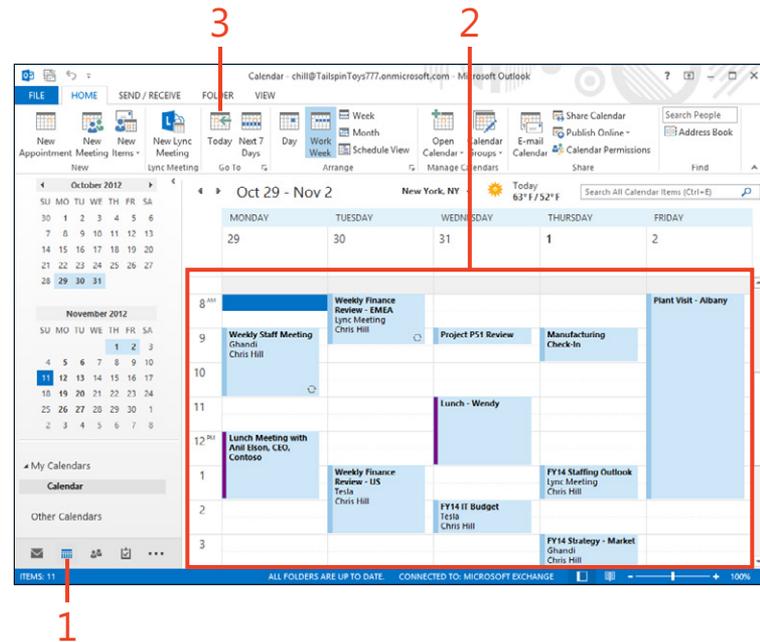
You can view your Outlook 2013 calendar in several different formats. Day view is an hour-by-hour view of your daily schedule, whereas Month view shows your schedule for the entire month. The Date Navigator is a small calendar with which you

can navigate quickly to a specific day, week, or month. The To-Do Bar consolidates all of the features of task list, Date Navigator, and appointment list into one task pane.

Use the calendar views and Date Navigator

- 1 At the bottom of the Folder pane, click the Calendar icon.
- 2 View the week's meetings and appointments.
- 3 To display the current day in the current view, click Today.

(continued on next page)



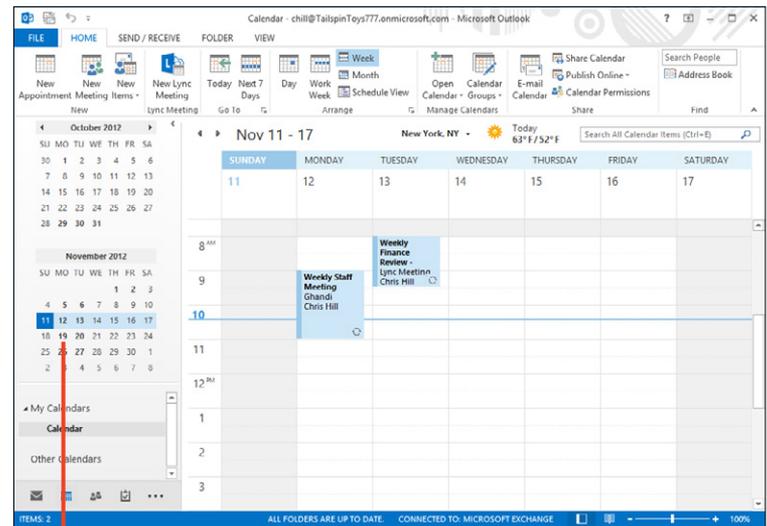
TIP You can access the current, last three, and next three months by clicking the month name in the Date Navigator. This is handy if you want to jump back a few months or jump forward a month or two.



TRY THIS! Click at the left side of a week in the Date Navigator to show that week's items.

Use the calendar views and Date Navigator (continued)

- 4 In the Date Navigator, click a different date.
 - 5 To view the selected day's appointments and meetings, click Day.
- (continued on next page)*



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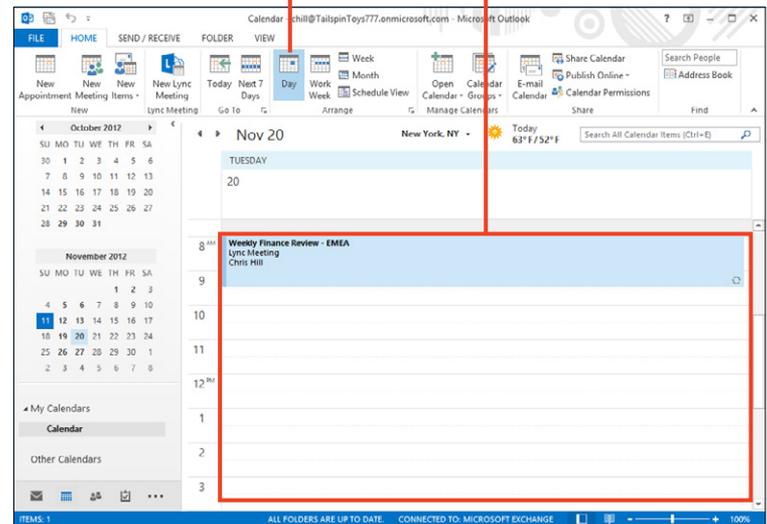
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TIP You can make more room available for the Calendar pane on the screen by resizing or minimizing the Folder pane.

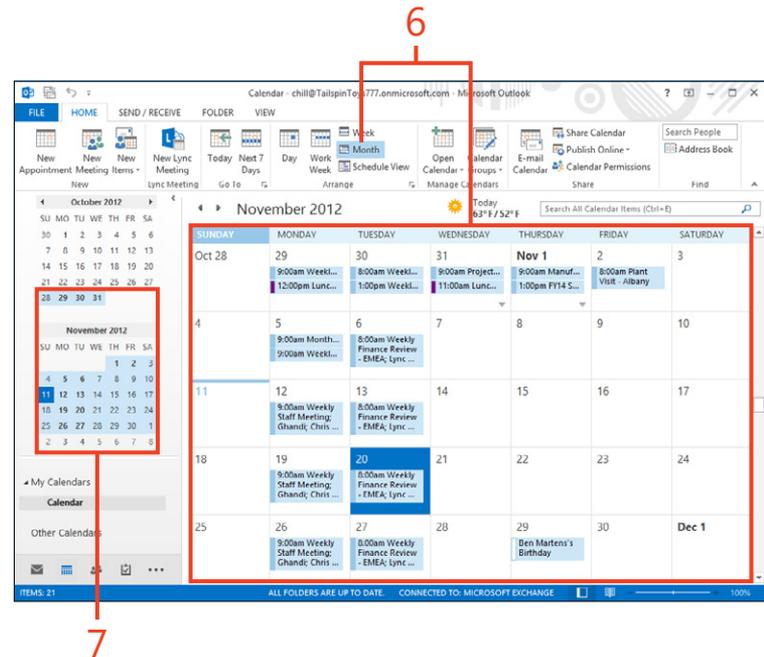


TRY THIS! To return to today's date, right-click inside a view and then, on the shortcut menu that appears, click Today.



Use the calendar views and Date Navigator *(continued)*

- 6 Click Month to see a month's schedule.
- 7 The displayed date range is highlighted in the Date Navigator.



Using the To-Do Bar

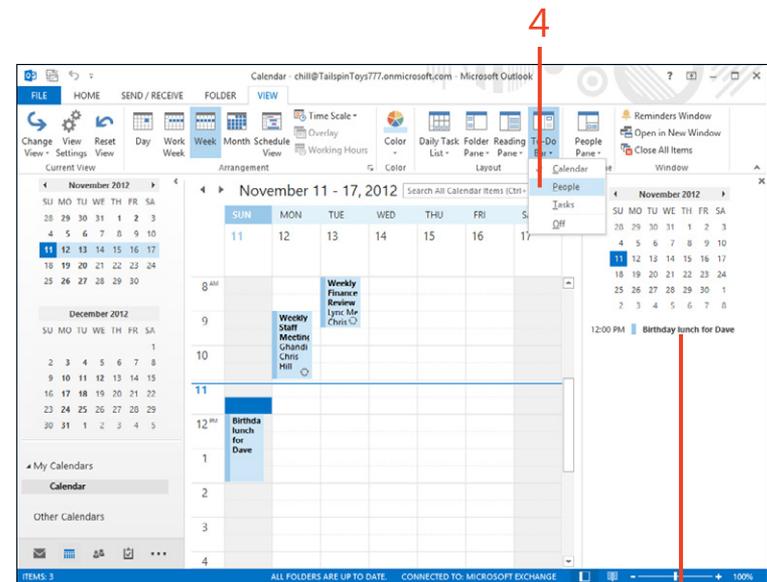
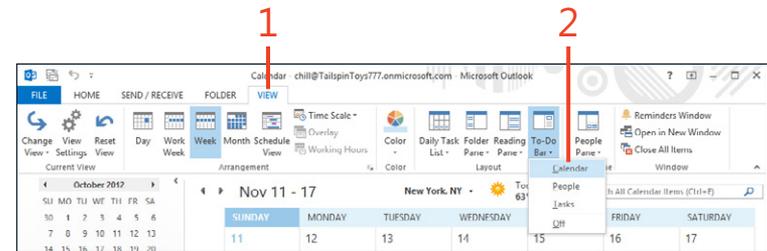
The To-Do Bar lets you view other information in the Calendar view as well as calendar items. In addition to showing a small calendar, you can use to choose a day to view (in place of the

Folder pane, for example). You can also view contacts that you have added to your Favorites as well as upcoming tasks.

Use the To-Do Bar

- 1 On the ribbon, click the View tab.
- 2 In the Layouts group, click To-Do Bar and then, in the drop-down list that appears, choose Calendar
- 3 Any items for the current day appear in the To-Do Bar.
- 4 Again, in the Layouts group, click To-Do Bar and then, in the drop-down list that appears, choose People.

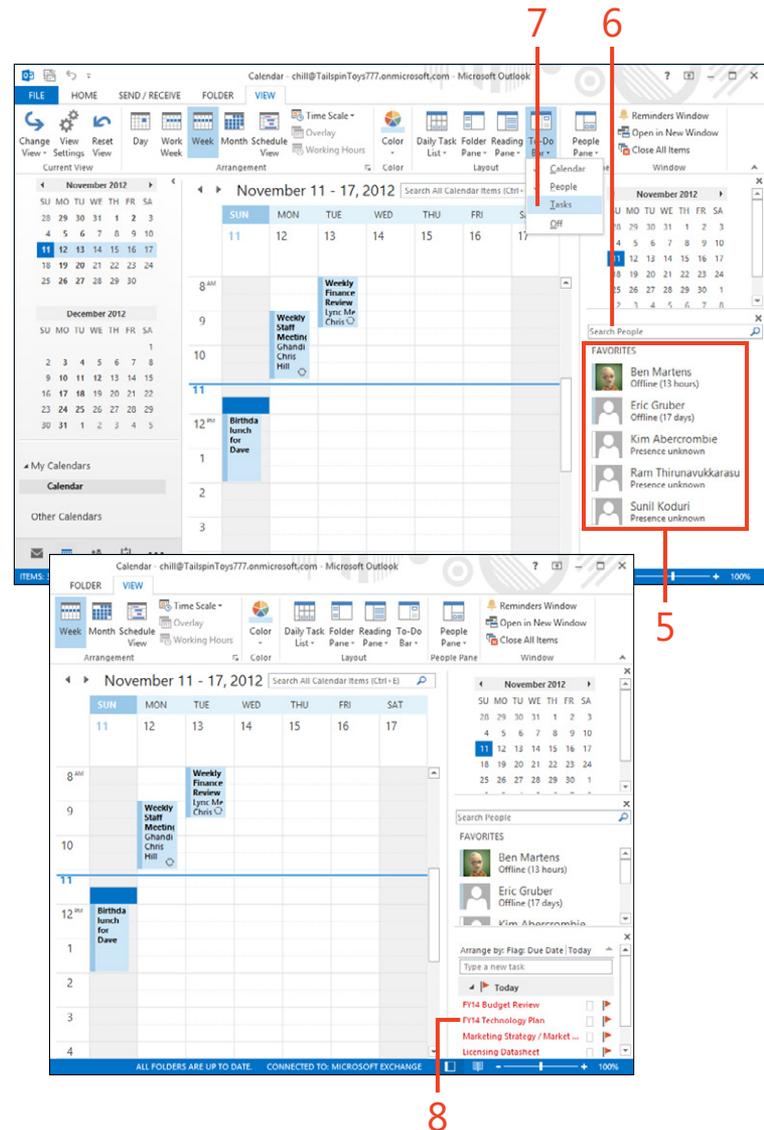
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TIP Choose the Minimized option from the To-Do Bar submenu to make the To-Do Bar automatically hide at the edge of the Outlook window.

Use the To-Do Bar (continued)

- 5 People that you have added as favorites appear in the To-Do Bar.
- 6 Use the Search People text box to search for contacts.
- 7 In the Layouts group, click To-Do Bar and then, in the drop-down list that appears, choose Tasks.
- 8 Double-click a task to open it.



TIP Depending on the options you set for the To-Do Bar, portions of the Appointments or Tasks areas of the To-Do Bar might be blank.

Adding appointments

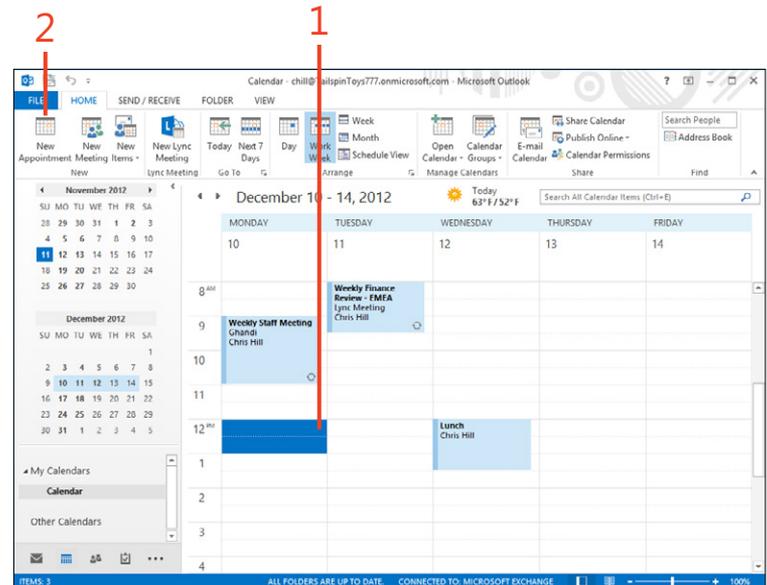
An appointment in Outlook 2013 is an activity you enter for a specific time that, unlike a meeting, doesn't typically involve other people or resources. When you schedule an appointment, you block out a day, a time, and a location for that appointment

Add an appointment with the menu

- 1 Select a block of time for the appointment.
- 2 On the Home tab, in the New group, click New Appointment.

(continued on next page)

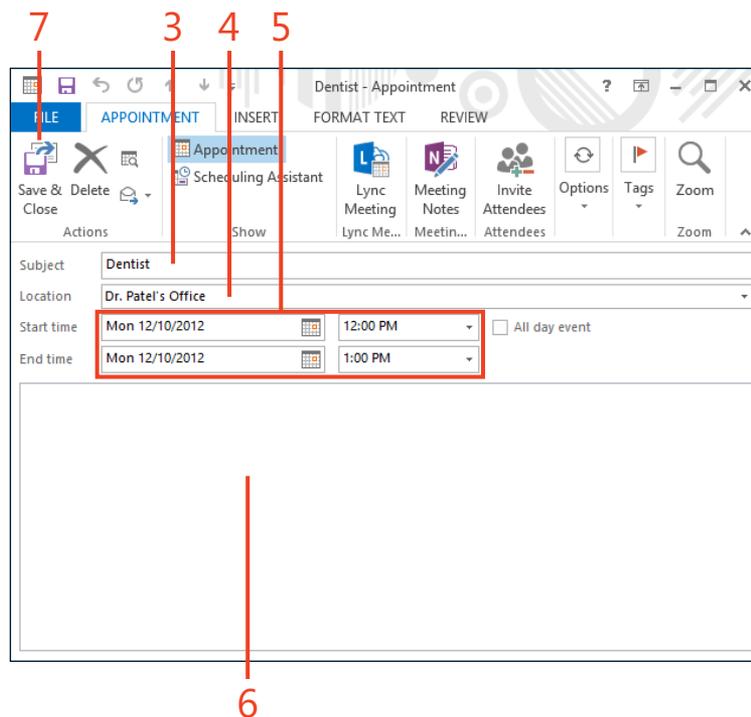
to occur. As mentioned earlier, Outlook also lets you set a reminder that flashes on your screen and plays a sound to alert you to the appointment. To learn how to set a reminder, see page 164.



TIP Keep your appointment subjects as short as possible so that they're easy to read in the Calendar view.

Add an appointment with the menu *(continued)*

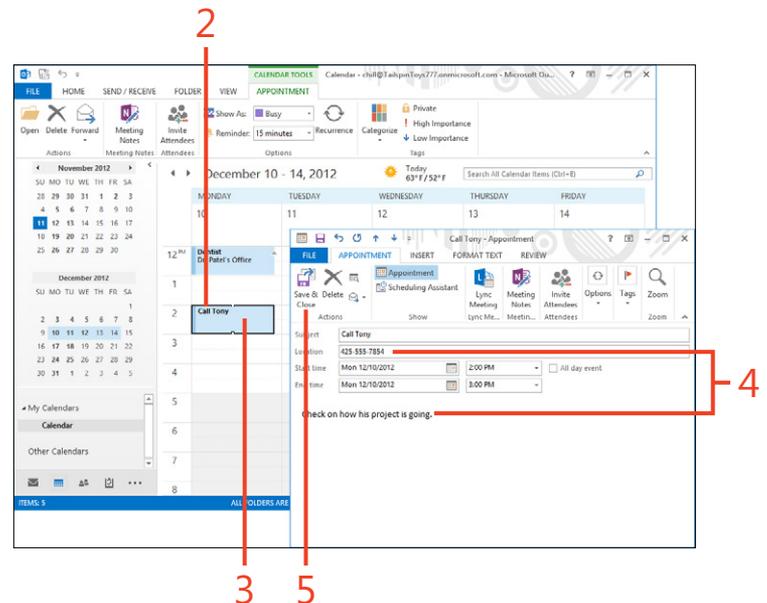
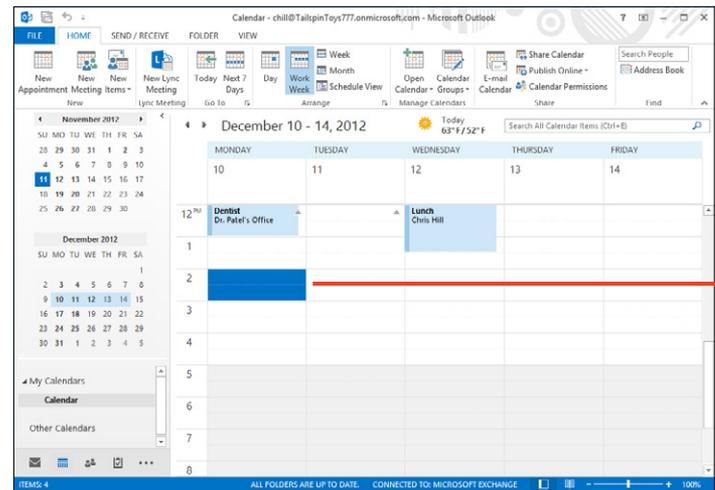
- 3 Type a subject.
- 4 Type the location of the appointment.
- 5 Adjust the date and times, if needed.
- 6 Add notes if you want.
- 7 Click the Save & Close button.



TRY THIS! If you'd like to add extended information about an appointment, click in the text area at the bottom of the Appointment window. Type a longer description here, such as directions to the appointment location, important information about the appointment, and so on.

Add an appointment right on the calendar

- 1 On the calendar, drag to select a block of time for the appointment.
- 2 Type the subject of the appointment and press Enter.
- 3 Double-click the appointment to open the appointment form.
- 4 Add the location, notes, and other information to the appointment.
- 5 Click the Save & Close button.



TIP If you use Outlook with a Microsoft Exchange Server account, others can easily see your free/busy time. They will know when you're busy and can schedule meetings with you based on this information.



TRY THIS! To categorize the appointment, right-click the appointment, point to Categorize, and then, on the submenu that appears, click a category.

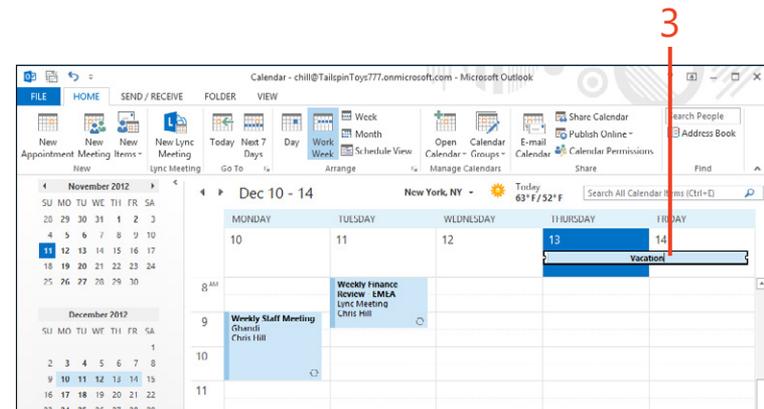
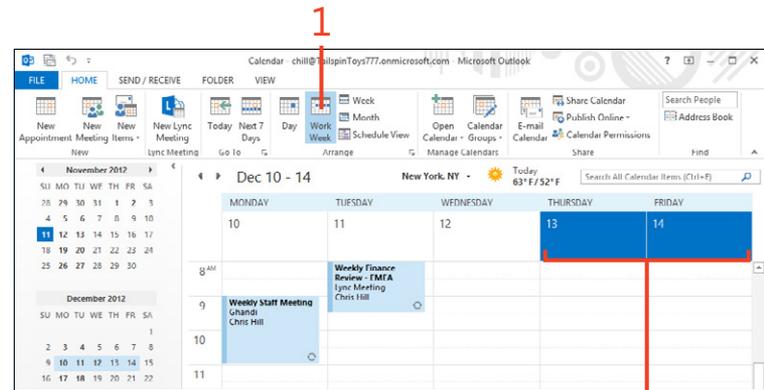
Adding and modifying events

In Outlook 2013, an event is an activity that runs for 24 hours or longer. An example of an event is a weeklong conference or seminar that you attend. Events display as banners at the top of the day and run from midnight to midnight, so they don't take

Add the event

- 1 On the Home tab, in the Arrange group, click Work Week.
- 2 On the calendar, select one or more days.
- 3 Type the subject for the event.

up blocks of time on the calendar. This display method leaves room in your calendar for you to show appointments or meetings that you might schedule during event days.



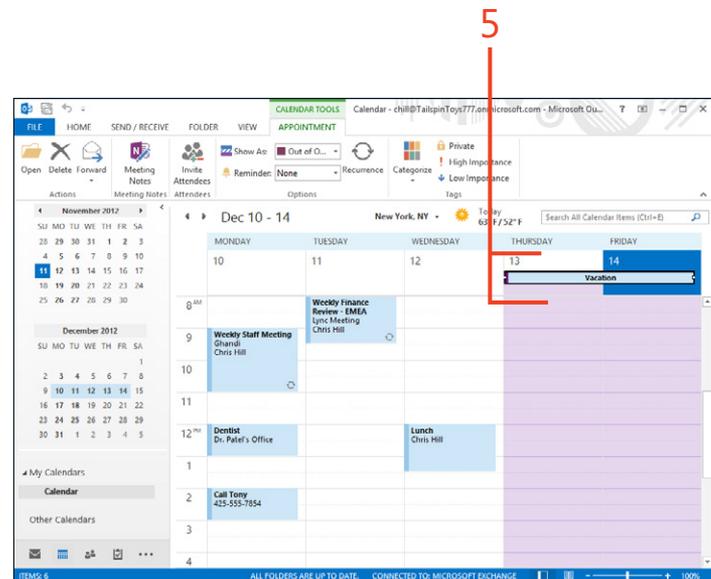
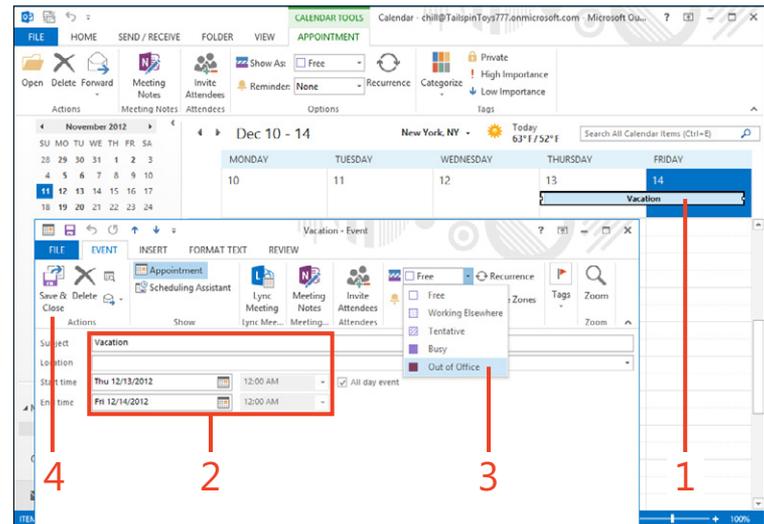
TIP To add an all-day event to a day other than the current day, display the week or month, right-click the day, and then, on the shortcut menu that appears, click New All Day Event.



TRY THIS! You can add more information about an event to the text area at the bottom of the Event window.

Modify an event

- 1 Double-click the event to open it.
- 2 Change details of the event as needed.
- 3 Choose a free/busy option.
- 4 Click Save & Close.
- 5 The selected days now show as Out Of Office (purple).



TIP You might already have events entered in your Calendar folder without even knowing it. When you create a new contact in the Contacts folder and include a birthday or anniversary for the contact, Outlook schedules that date as an event in the calendar.



SEE ALSO For information about setting up contacts, see "Working with contacts" on page 41.

Adding meetings

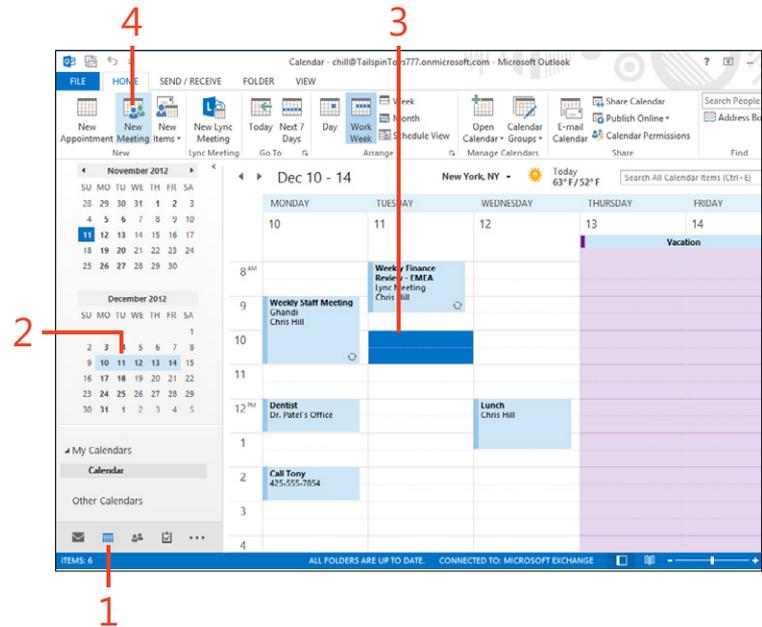
A meeting is an activity (often a physical meeting or conference call) that involves other people and sometimes resources. A resource can be a conference room, VCR, slide projector, telephones, laptop computer, or other equipment. Usually, a meeting involves you and at least two other people (but can

certainly be just you and one other person). Outlook sends a meeting invitation to every person you designate, and they can accept or reject the request or propose a new time for the meeting.

Create a meeting

- 1 At the bottom of the Folder pane, click the Calendar icon to open the Calendar folder.
- 2 Select a date.
- 3 Select a block of time for the meeting.
- 4 On the Home tab, in the New group, click New Meeting.

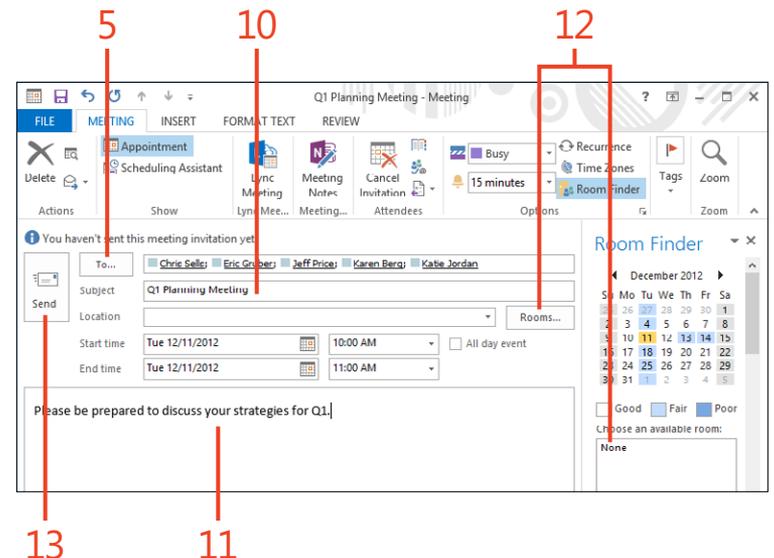
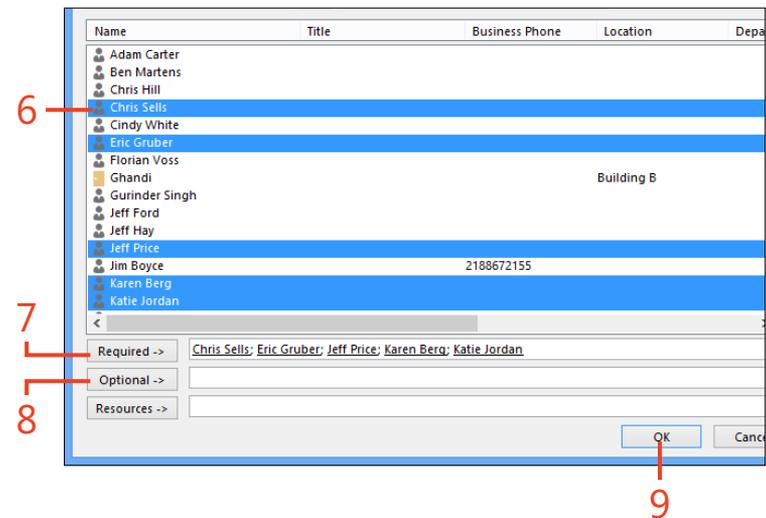
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TIP You can use the Scheduling Assistant to help you find a time that is open for all invitees, and you can also identify available resources. To switch to the Scheduling Assistant view, on the Meeting tab, in the Show group, click Scheduling Assistant. Plus, as a follow-up, you can use the Tracking button on the Meeting tab to see which attendees have responded to your meeting request.

Create a meeting *(continued)*

- 5 Click To.
- 6 In the Select Attendees And Resources dialog box, choose the attendees and resources from the Address Book, or type the addresses manually.
- 7 If the invitee must attend, click Required.
- 8 If the invitee isn't required to attend, click Optional.
- 9 Click OK when you are done.
- 10 In the Subject box, type a description of the meeting.
- 11 Add notes, directions, or comments for the meeting as needed.
- 12 Choose a room, or type the location of the meeting in the Location box.
- 13 Click Send.



CAUTION Make sure that your attendee list has correct email addresses. If you attempt to send the meeting request to someone not in one of your address books, Outlook informs you that the person can't be validated.



TIP When you type your meeting subject, keep it short but descriptive. "Team Meeting" might not be enough if people are members of multiple teams. Use something specific like "Development Team Meeting" for your description.

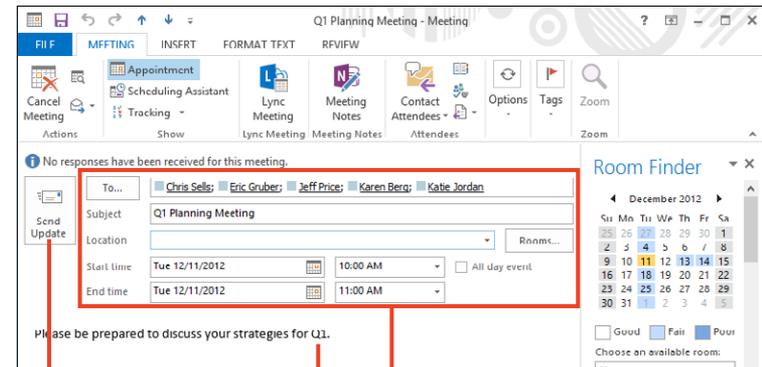
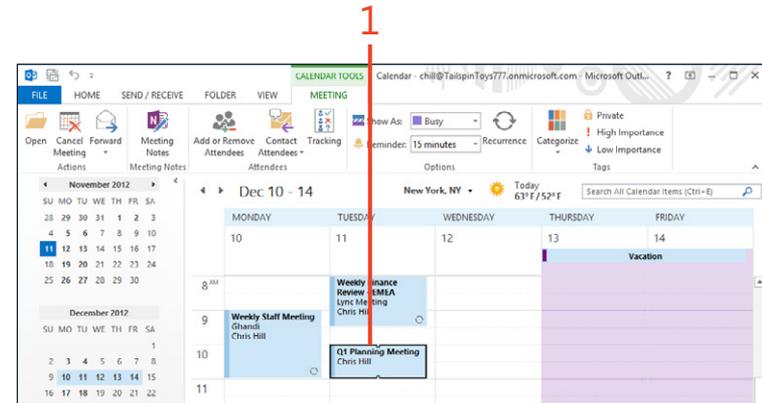
Modifying meetings and tracking responses

After you create a meeting in Outlook 2013, you can add or remove attendees, add notes and attachments, change it to an online meeting, and make other changes. You can make these

same types of changes with a new meeting invitation before you save it. You can also track which invitees have responded to your meeting invitation to find out who will attend.

Edit a meeting

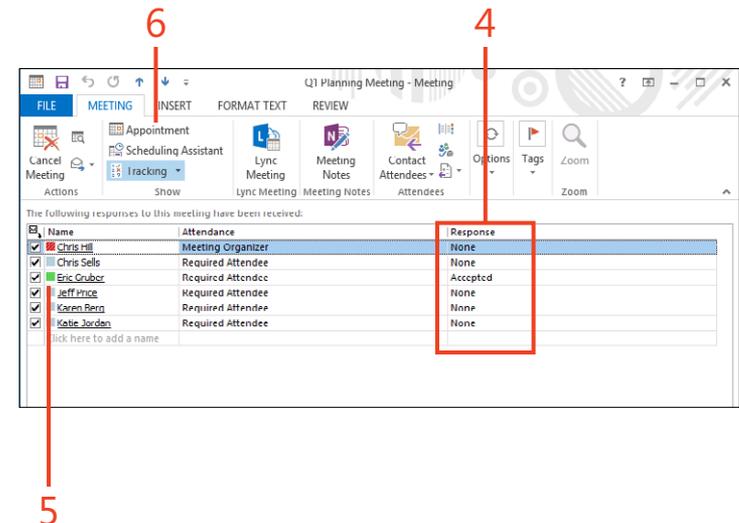
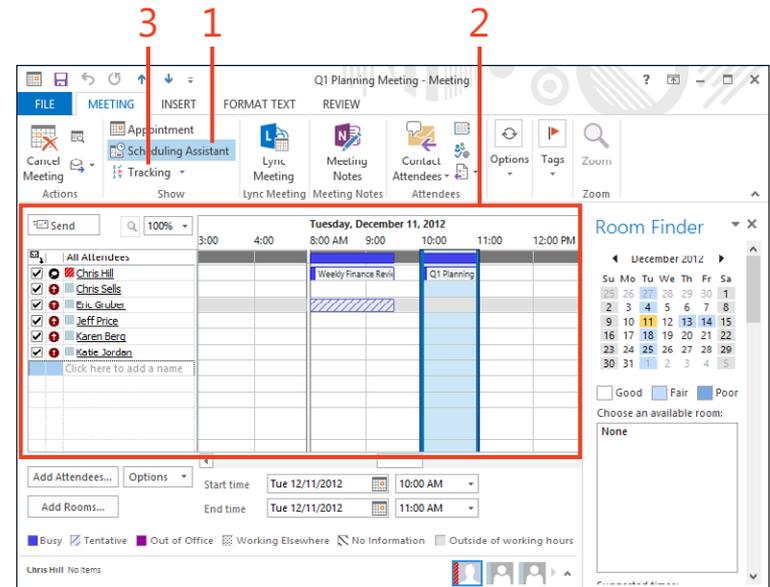
- 1 Open an existing meeting.
- 2 Change attendees, subject, and location for the meeting, as needed.
- 3 Add notes or attach documents if needed.
- 4 Click Send Update to send an updated meeting invitation.



TIP You can reschedule a meeting simply by dragging it to a new location on the calendar. Regardless of the method you use to move the meeting, Outlook can automatically send an update to all attendees that includes a notice of the new day and time.

Track attendee responses

- 1 Open an existing meeting request. Then, on the Meeting tab, in the Show group, click Scheduling Assistant.
- 2 View attendees' free/busy times and adjust meeting day and time as needed.
- 3 Again, on the Meeting tab, in the Show group, click Tracking.
- 4 View response status for each attendee.
- 5 View online status.
- 6 On the ribbon, on the Meeting tab, click Appointment to return to the Appointment page, and then click Send Update.



SEE ALSO For information about the Address Book and adding new contacts, see "Working with contacts" on page 41.



TIP Outlook provides the Scheduling Assistant to help you set up meetings with other people in your organization. The Scheduling Assistant lets you see other people's schedules if they have mailboxes in the same Exchange Server environment.

Inserting an Outlook item into a calendar item

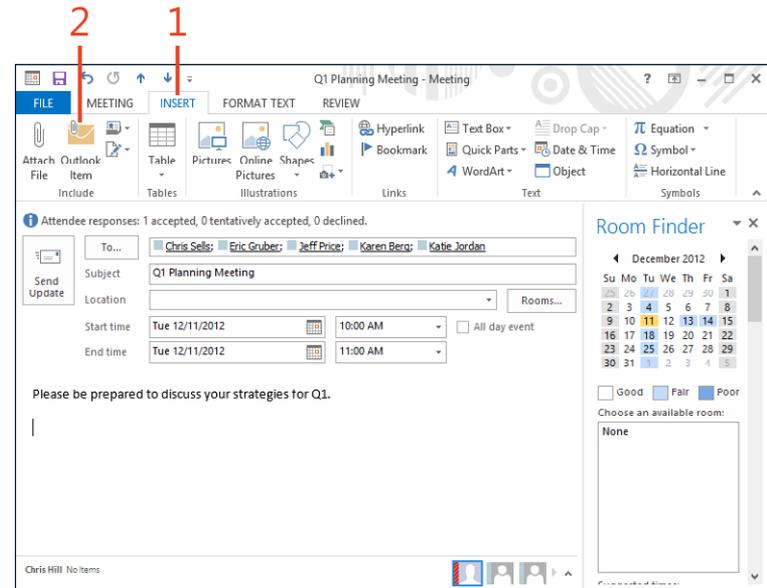
In Outlook 2013, you can insert objects, files, and Outlook items into your calendar items. The capability to insert Outlook items means that you can insert contacts, email messages, and other Outlook items into an appointment, meeting, or event item. For

example, if you are having a meeting to discuss a project with an outside partner, you can insert the partner's contact(s) into the meeting invitation so that other attendees will have them.

Add an Outlook item

- 1 With an appointment, meeting, or event open, on the ribbon, click the Insert tab.
- 2 In the Include group, click Outlook Item.

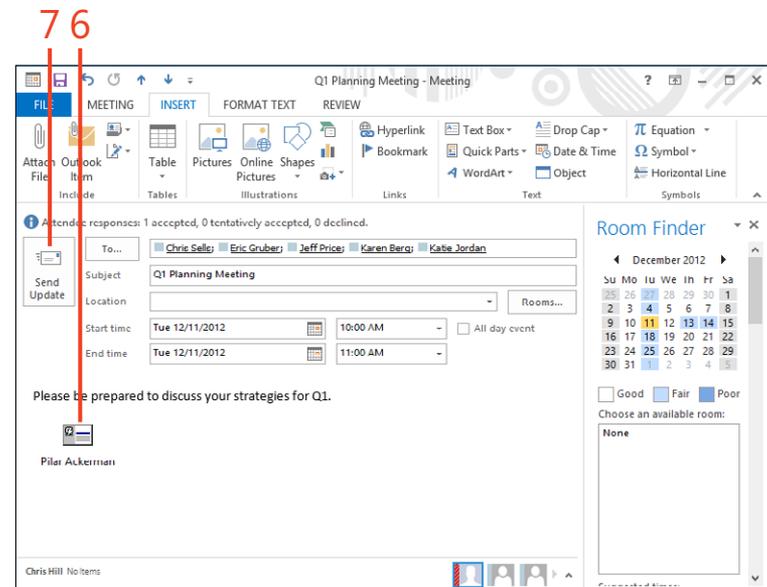
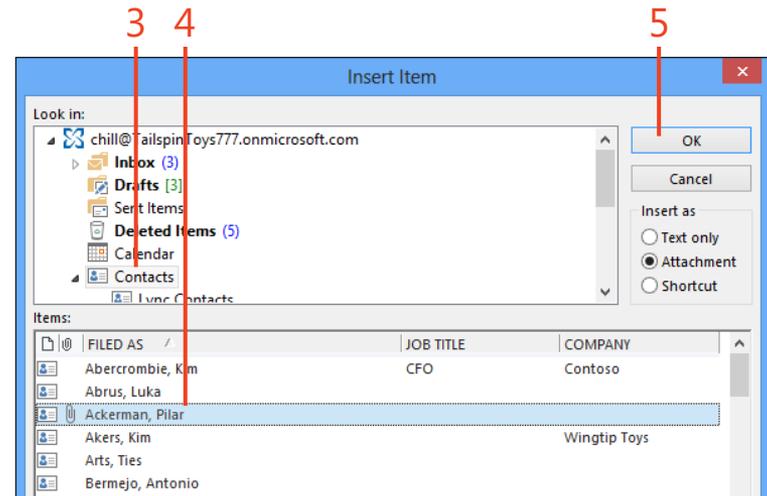
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TIP Outlook uses an item-specific icon to indicate the type of Outlook item that you can insert, such as a note icon for a note item or calendar icon for a calendar item.

Add an Outlook item *(continued)*

- 3 In the Insert Item dialog box, select the Outlook folder in which the item is stored.
- 4 Select the Outlook item that you want to insert from the Items list.
- 5 Click OK.
- 6 The selected item now appears in the comment field.
- 7 Click the Meeting, Appointment, or Event tab and then click Save & Close (for an appointment or event) or Send Update (for a meeting).



TRY THIS! To insert the text contained in a contact rather than the contact address card itself, in the Insert Item dialog box, select the Text Only option.

Attaching a file or document to a calendar item

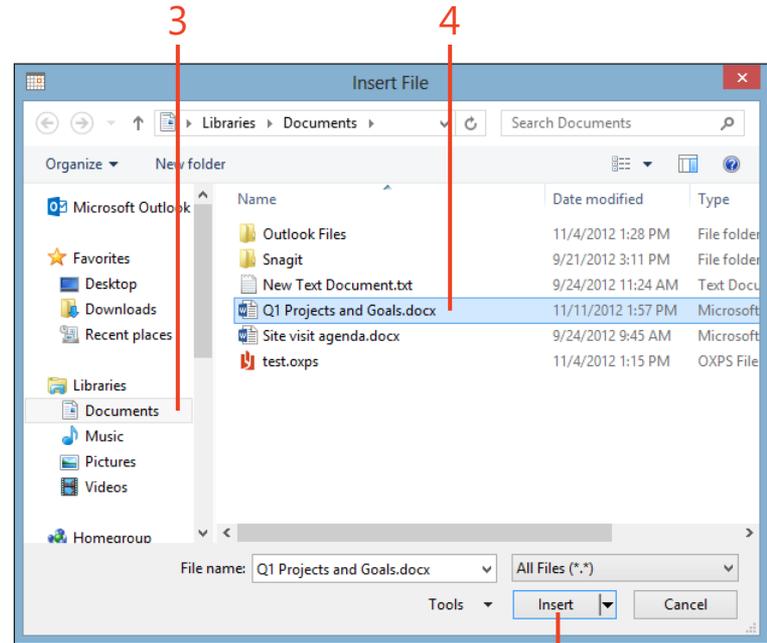
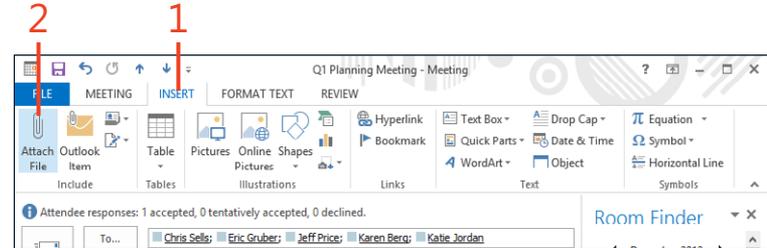
In many situations, you might want to attach a document or other type of file to an Outlook 2013 calendar item. For example, if you are meeting to discuss a project, you might

attach a project plan, financials from Microsoft Excel, or a report.

Attach a file

- 1 With an appointment, meeting, or event open, on the ribbon, click the Insert tab.
- 2 In the Include group, click the Attach File button.
- 3 In the Insert File dialog box, select a file location.
- 4 Select the file that you want to insert.
- 5 Click Insert.

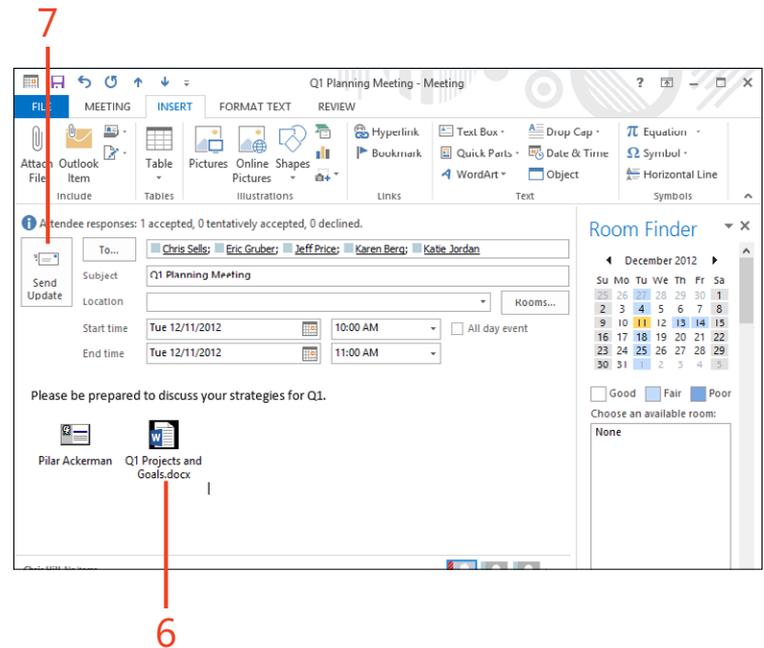
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TIP To delete a file, item, or object from a calendar item, select the item and press Delete.

Attach a file *(continued)*

- 6 The added file appears in the comment field.
- 7 Click the Meeting, Appointment, or Event tab and then click Save & Close (or, for a meeting, click Send Update).



Inserting the contents of a document into a calendar item

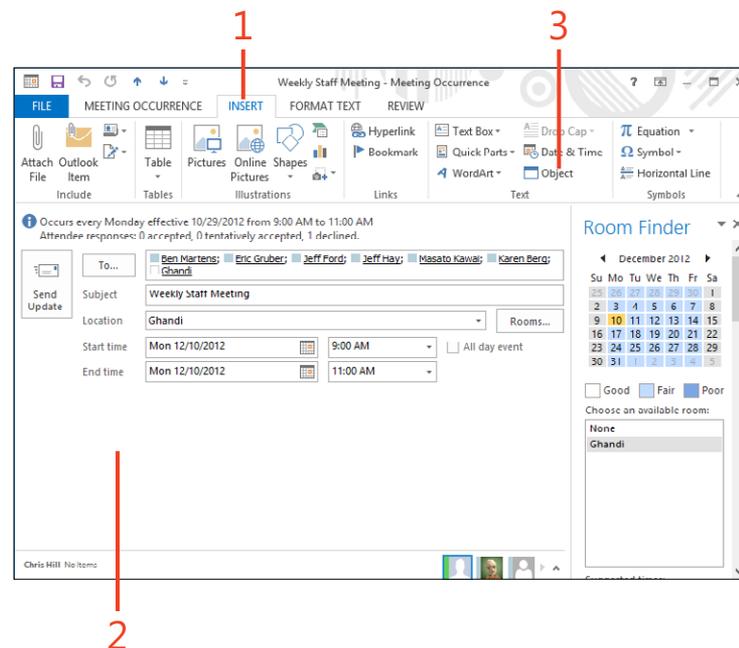
Sometimes, you'll want to insert the contents of a document into an Outlook 2013 meeting or other calendar item, rather than attach the item to it. Inserting the contents into the

calendar item makes it possible for you and others to view those contents without opening the attached source document.

Insert contents of a document

- 1 With an appointment, meeting, or event open, on the ribbon, click the Insert tab.
- 2 Click in the notes area of the item.
- 3 Back on the ribbon, in the Text group, click Object.

(continued on next page)

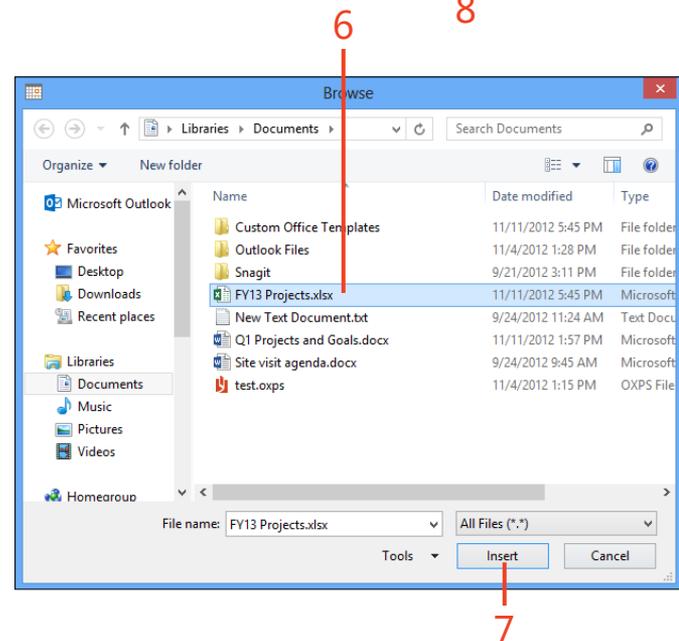
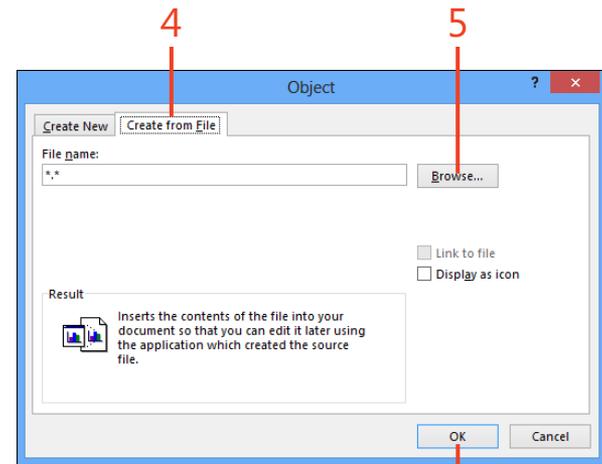


TIP Because you can add objects from a file, you can also embed a portion of a spreadsheet or other type of document in the appointment item for reference. For example, if you are discussing a project issue list in a meeting, you might embed the issue list from an Excel spreadsheet in the meeting request so that the participants can review it before the meeting.

Insert contents of a document *(continued)*

- 4 In the Object dialog box, click the Create From File tab.
- 5 Click Browse.
- 6 In the Browse dialog box, locate and select the object that you want to add.
- 7 Click Insert.
- 8 In the Object dialog box, click OK.

(continued on next page)



Insert contents of a document *(continued)*

9 Verify that the added object appears in the comment field.

10 Click Save & Close (or Send Update).

10 9

The screenshot shows the Microsoft Office calendar interface for a meeting titled "Weekly Staff Meeting - Meeting Occurrence". The "INSERT" ribbon is active, and the "Insert Object" dialog box is open. The "Room Finder" pane is also visible on the right side of the window. Two red vertical lines are drawn over the image, with the number "10" at the top of the left line and "9" at the top of the right line. The left line points to the "Send Update" button, and the right line points to the "Insert Object" dialog box.

Weekly Staff Meeting - Meeting Occurrence

Occurs every Monday effective 10/29/2012 from 9:00 AM to 11:00 AM
Attendee responses: 0 accepted, 0 tentatively accepted, 1 declined.

To: Ben Mertens; Eric Gruber; Jeff Ford; Jeff Hay; Masato Kawaj; Karen Berg; Ghandi

Subject: Weekly Staff Meeting

Location: Ghandi Rooms...

Start time: Mon 12/10/2012 9:00 AM All day event

End time: Mon 12/10/2012 11:00 AM

	Q1	Q2	Q3				
Project	P1	P2	P3	P4	P5	P6	P7
PS1							
Hairy Bear							
Monster Craze							

Room Finder

December 2012

Su	Mo	Tu	We	Th	Fr	Sa
25	26	27	28	29	30	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

Good Fair Poor

Choose an available room:

None
Ghandi



TIP To create a new object, such as an Excel worksheet, in the Insert Object dialog box, select Create New. When you click OK to insert the object, you then create the new object in that object's native application (such as Excel).

Inserting an Excel object into a calendar item

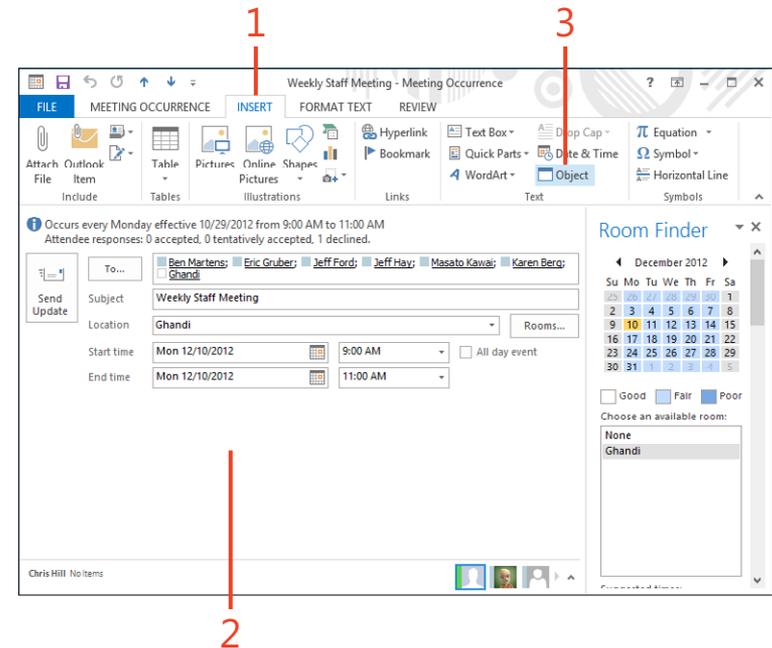
You can insert a blank Excel object into a calendar item. This makes it possible for you to edit spreadsheet data within the calendar item itself. This capability is useful when you want to

be able to enter values and calculate data that doesn't exist yet in an Excel file.

Insert a blank Excel object

- 1 With an appointment, meeting, or event open, on the ribbon, click the Insert tab.
- 2 Click in the notes area of the item.
- 3 Back on the ribbon, in the Text group, click Object.

(continued on next page)

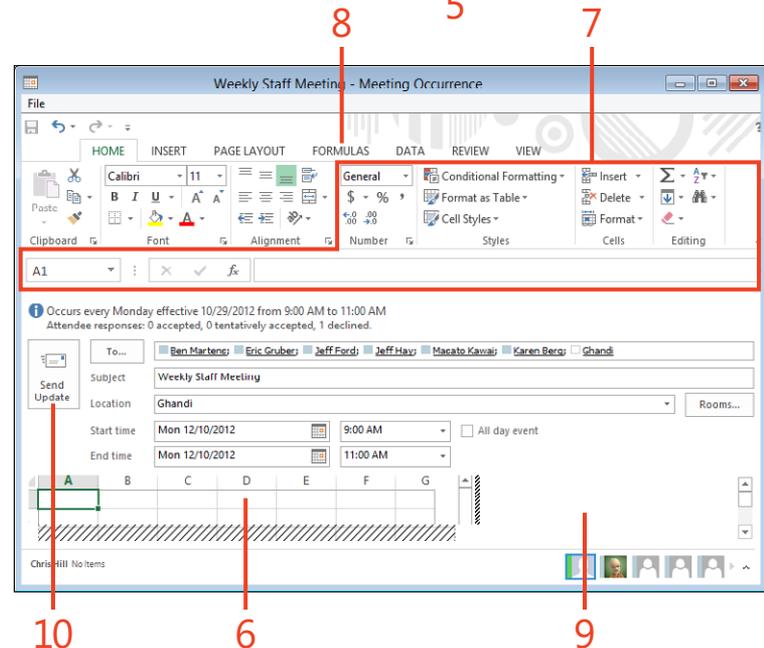
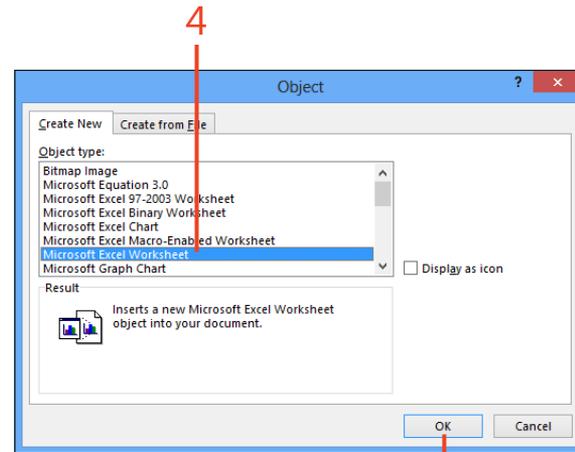


TIP Outlook adds a reminder to each meeting you create. The default is 15 minutes, but you can either change the default or change the reminder for a specific meeting. To change the reminder for one meeting, on the ribbon, on the Meeting Occurrence tab, click the Reminder drop-down list. To set the default reminder time, on the ribbon, click the File tab to display the Backstage view. Click the Options tab and then, in the Outlook Options dialog box, choose Calendar. In the Default Reminders drop-down list, select the desired reminder time.

7: MANAGING A CALENDAR

Insert a blank Excel object *(continued)*

- 4 In the Object dialog box, click Microsoft Excel Worksheet on the Create New tab.
- 5 Click OK.
- 6 Add values and formulas as needed in the Excel object.
- 7 On the ribbon, on the home tab, use editing tools to modify or format the Excel data.
- 8 Click the Formulas tab to access additional Excel commands and features.
- 9 Click in a blank area of the notes field to stop editing the Excel object.
- 10 Click Send Update to send the meeting item with the embedded Excel object.



TIP Reminders display even if the Calendar item is overdue. For example, if an event was set for Saturday and you didn't turn on your computer that day, the next time you start Windows the reminder for that event appears. You can dismiss the reminder at that point.

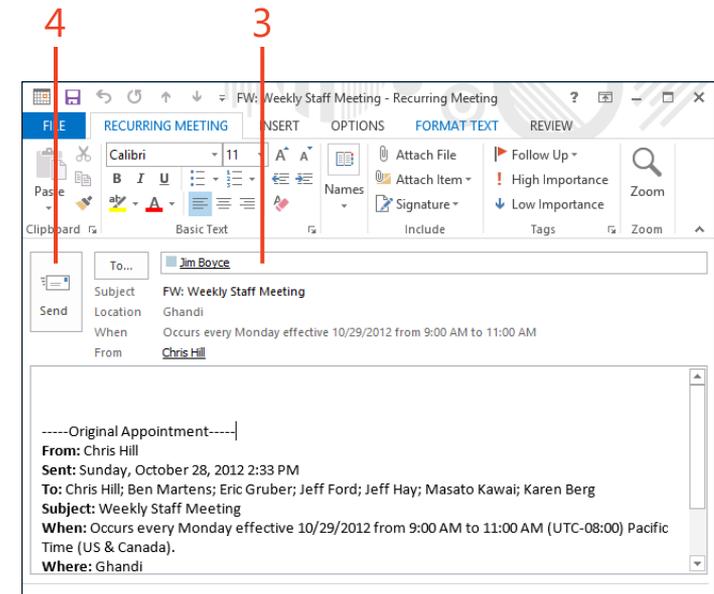
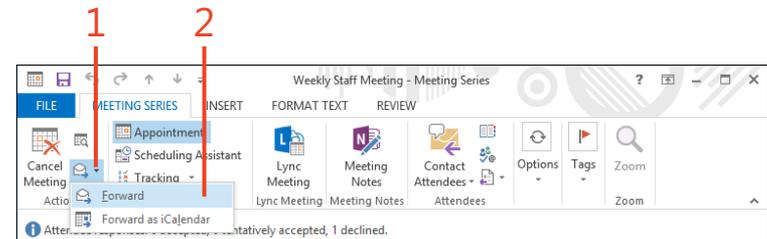
Sharing calendar information

With Outlook 2013, you can share Calendar information with others. You can forward a Calendar item by email to other Outlook users, or you can forward an iCalendar item to any

user of any Internet-connected mail program. You should use iCalendar when you schedule meetings with people who don't use Outlook.

Forward a calendar item

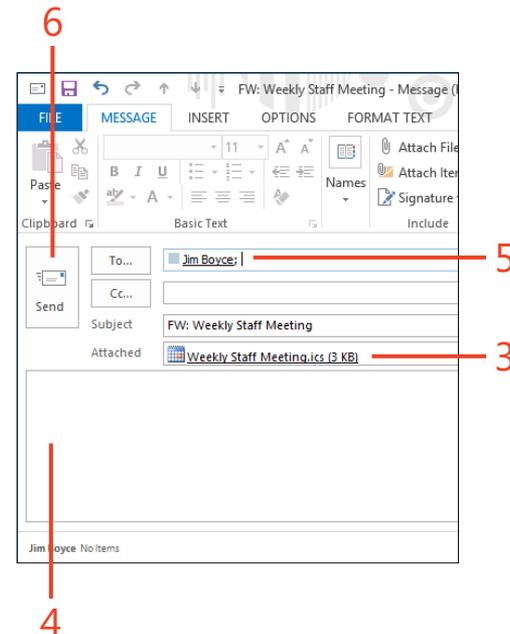
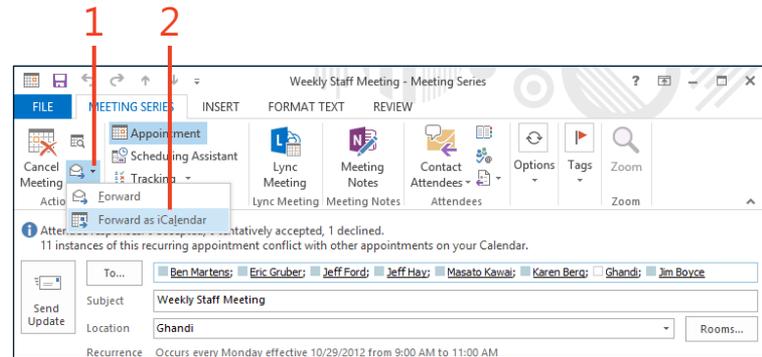
- 1 Open an existing meeting item. On the Meeting Series tab, in the Actions group, click the drop-down arrow on the Forward button.
- 2 Choose Forward.
- 3 Add one or more recipients in the To box.
- 4 Click Send.



TIP If you forward a calendar item that has an attachment, that attachment is forwarded along with the calendar item.

Forward an item as an iCalendar item

- 1 Open an existing meeting item. On the Meeting Series tab, in the Actions group, click the drop-down arrow on the Forward button.
- 2 Choose Forward As iCalendar.
- 3 The iCalendar attachment appears in the Attached field.
- 4 Add one or more recipients in the To box.
- 5 Add notes as desired.
- 6 Click Send.



TIP iCalendar is for communicating with people who don't use Outlook. If you want to forward a calendar item to someone who uses Outlook, on the Actions menu, click the Forward command, or, in the Actions group on the meeting form's ribbon, click Forward.

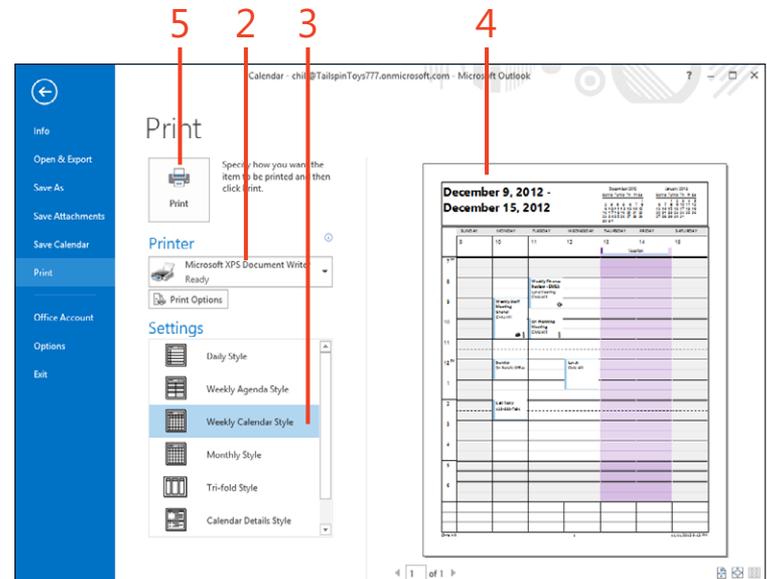
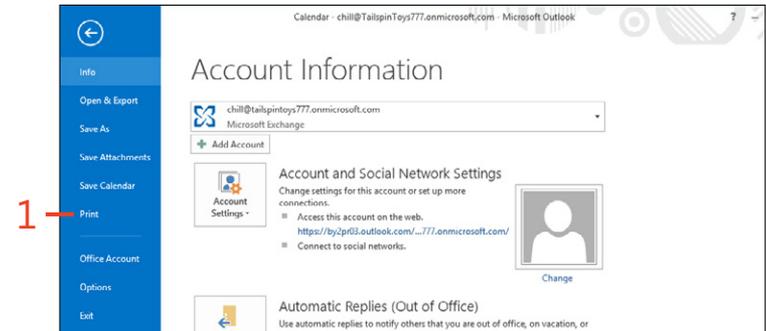
Printing calendars

You can print your Outlook 2013 appointment calendar, such as your daily or weekly appointments, meetings, and

events, or you can print an individual calendar item such as a meeting item.

Print your appointment calendar

- 1 Open the Calendar folder, click the File tab to display the Backstage view, and then click the Print tab.
- 2 In the Printer section, choose a printer.
- 3 In the Settings section, choose a calendar style.
- 4 Preview the results.
- 5 Click Print.



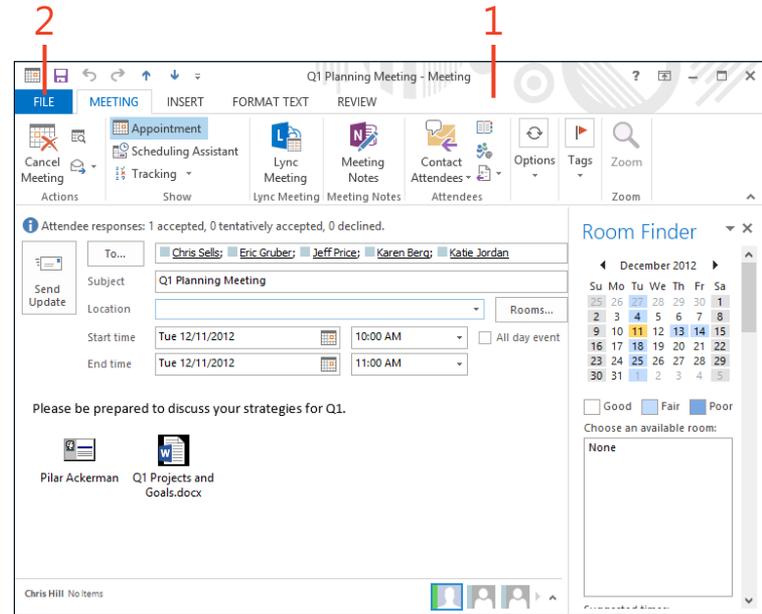
TIP You can print your calendars in Daily, Weekly, Monthly, Tri-fold, Calendar Detail, and Memo Style. Try printing your calendar in each one of these styles and then pick your favorite one.

TRY THIS! Print your appointment calendar at the beginning of each week so that you can keep track of all your upcoming events, appointments, and meetings. As schedules change, such as a meeting being delayed or canceled, make these changes on the hard copy as well as in Outlook. If too many changes occur, you might need to print a fresh calendar.

Print a calendar item

- 1 Open the calendar item that you want to print.
- 2 Click the File tab to display the Backstage view.

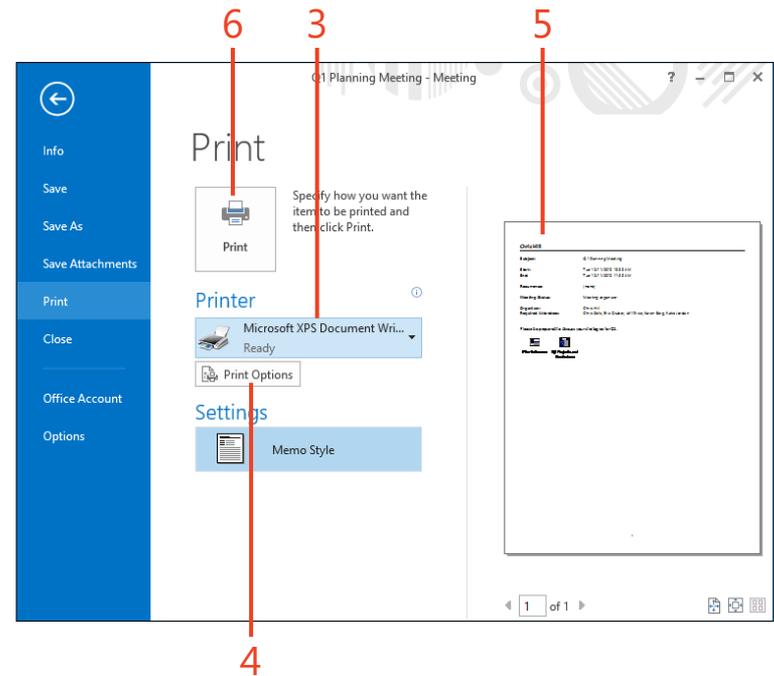
(continued on next page)



TIP If you want to print to a printer other than the default one, click the Printer drop-down list and select the printer.

Print a calendar item *(continued)*

- 3 Click the Print tab and then, in the Printer section, choose a printer.
- 4 Choose other print options such as printing attachments in addition to the meeting item.
- 5 Preview the results.
- 6 Click Print.



TIP Attachments within an item will not print automatically, but you can use the Print Options button on the Print page to print the attachments.

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