

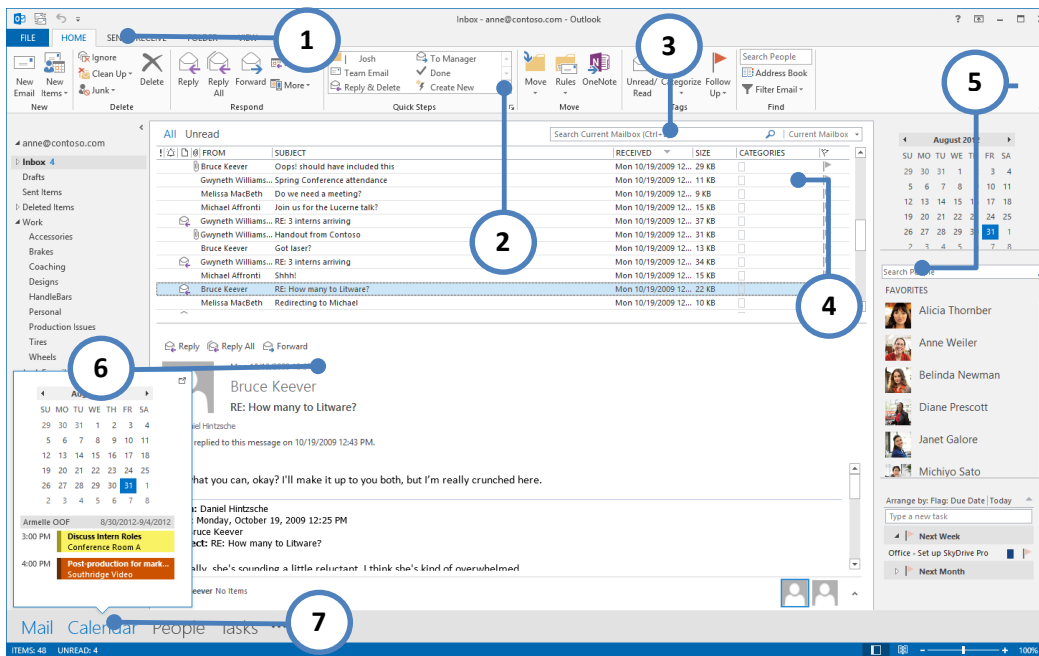
# Outlook Desktop 2013 Reference Sheet

Created: October, 2013

Wellspan Organizational Learning & Development



This reference refers to WellSpan's Outlook that is accessed via a Start Menu or Icon on the Desktop.



1. **Ribbon Tabs** - click to display groups of buttons
2. **Ribbon** - strip of buttons that put common options in plain view
3. **Search** - Search folders, subfolders, & mailboxes
4. **Message List** - Flag, categorize & delete messages
5. **To Do Bar** - Displays date navigator, appointments, & tasks
6. **Reading Pane** - View current message & reply or forward from here
7. **View Bar** - click to switch between views: Mail, Calendar, People, & Tasks

## View a Message

1. Click to select the message in the message list
  2. Message will appear in Reading Pane
- OR
1. Double click a message to display it in a separate window

## Create a new message

1. Click **Mail** in view bar and click **New Email** in Ribbon
2. A **Message Form** appears
3. Add recipients, a subject and the body of the message
4. Click **Send** button

## Forward or reply to a message

1. With original message in Reading Pane, click **Reply**, **Reply All** or **Forward** (on ribbon or in reading pane).
2. Complete **To** field (for forward), add message
3. Click **Send** button

NOTE: To remove recipients, click the name, and press Delete. To add a recipient, click in **To**, **Cc**, or **Bcc** box and add recipient.

## Work with Attachments

- Add an attachment to a message:
  1. From the Message Form, click **Insert** Ribbon Tab
  2. Click **Attach File** button
  3. Browse to the file location and click **Insert**
- Open an attachment:

1. Double-click the attachment
  - Save an attachment:
    1. Click attachment in Reading Pane or in open message; Attachments ribbon tab appears
    2. Click **Save As** in the ribbon
- OR
3. Right-click attachment; click **Save As**

## Create a signature

1. Click **File** Ribbon Tab
  2. Click **Options** in Backstage menu
  3. Click **Mail** option
  4. Click **Signatures...** button
  5. Click **New** button
  6. Name the signature
  7. Type and apply options to a signature in the body field
  8. Click **Save** button
- To automatically apply a signature to every message you compose:
9. From the Create a Signature window, click **New messages** and **Replies/forwards** field and select the name of your signature
  10. Click **OK** to apply changes
- NOTE: Do not ever add stationary or images to your signature, this makes emails very large.

## Set Automatic Replies (Out of Office)

1. Click **File** Ribbon Tab

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2. Click **Automatic Replies (Out of Office)**
3. Select **Send automatic replies**
4. Check “**Send replies only during this time period**” and set a start and end time/date
5. Type the message(s) you’d like recipients inside and/or outside WellSpan to receive
6. Click **OK**

### Create a Distribution Group

There are system groups; to see a list of those groups, click Address Book in the Home Ribbon Tab group; Click Address book field dropdown and select SYS-Distribution list.

To create a group:

1. Click **New Items** button in **Home** Ribbon Tab group
2. Point to **More Items...** Select **Contact Groups**
3. Type a name in **Name** field (this is the name you will type in the **To** field when messaging this group)
4. Click **Add Members... From Address Book** and search for and select desired members
5. Click **OK**
6. Click **Save & Close** in Ribbon

### Work with drafts

A draft is a message that you are not ready to send.


To save an unfinished message:

1. From Message Form, click  Save icon (upper right)

To continue work on a draft message:

2. Click **Drafts** folder in folder list.
3. Click message (it displays in Reading Pane).
4. Continue working on message in reading pane and click **Send** when complete

To discard a draft you no longer need:

1. Click **Drafts** folder in folder list.
2. Click message (it displays in Reading Pane).
3. Click  **Discard**.

### Set Inbox Rules

Create rules to automate actions on messages. For example, create a rule to automatically move mail from a specific address to a folder or forward specific messages to a person or group.


1. To create a rule based on a message in the Message List, right click the message; point to **Rules**
2. Select one of the criteria options and complete the rule as directed on screen and click **Save**

3. OR
4. Click **Create Rule...**; follow the on-screen instructions; and click **Save**.

You can also manage existing rules and create rules by clicking **Rules** in the **Home** ribbon and clicking **Manage Rules & Alerts...**

### Delete Messages

To delete a single message:

- Point to message in message list, click  Delete (far right of message list)

OR

- Right click message and click **Delete**

OR

- From **Home** Ribbon, click message to select it and click **Delete** in ribbon

To delete multiple messages:

1. Multi-select messages in a continuous list: Click the first message and then SHIFT+Click last message

OR

2. Multi-select a non-continuous list: Click the first message and then CTRL+Click each additional message
3. Follow one of the Delete options under (To Delete a Single Message)

View Deleted Messages:

- Click **Deleted Items** folder

NOTE: If messages have been deleted from the **Deleted Items** folder, they can still be accessed: Select the **Deleted Items** folder; Click **Folder** Ribbon Tab; Click **Recover Deleted Items** in Ribbon

### Mailbox Views

Click the **View** Ribbon Tab to display options to change how your Outlook window is viewed. Some examples are how the Folder Pane, Reading Pane and To-Do Bar appear on the window.

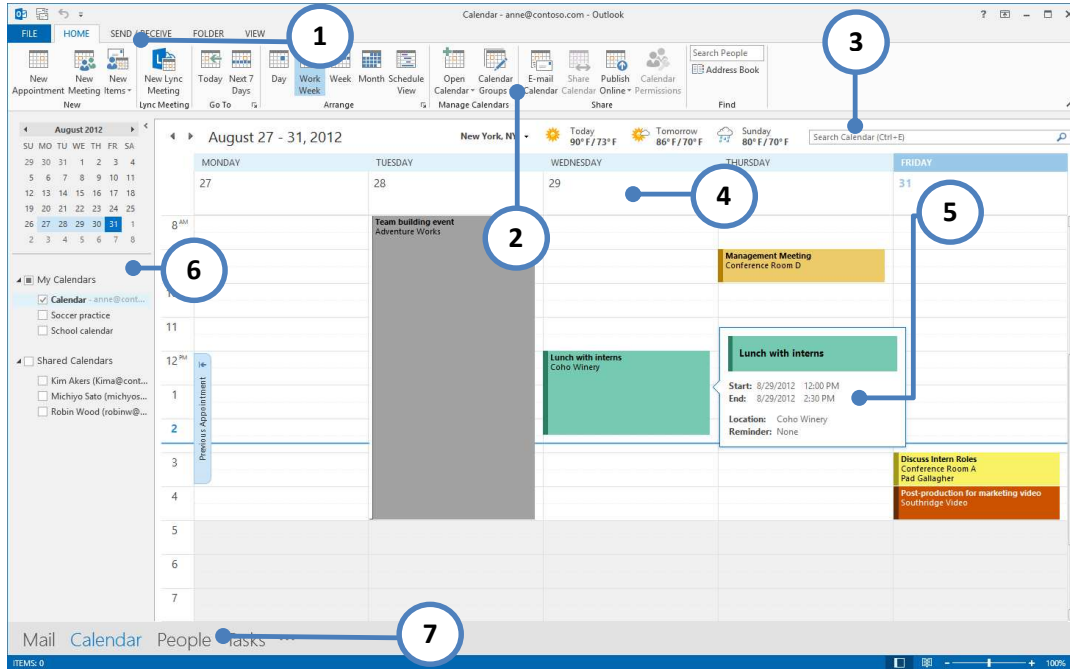
You have the option to view messages in conversations – this groups emails with the same subject.

NOTE: Changes you make to your view may impact what options you have for managing items in Outlook.

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1. **Ribbon Tabs** - click to display groups of buttons
2. **Ribbon** - strip of buttons that put common options in plain view
3. **Search** - Search calendar items by keyword
4. **Main Window** - Where calendar displays
5. **Peek** - Point to a calendar item to view details
6. **Calendars** - Top half is used to move from one date to another. Lower half is used to select one or more calendars to view
7. **View Bar** - click to switch between views: Mail, Calendar, People, & Tasks

## Views and Navigation

You can customize how your calendar appears by clicking the **View** Ribbon Tab and selecting the desired options (Daily Task List, Folder Pane, etc.). Some view options also display on the **Home** Ribbon Tab.

Navigate the calendar using the monthly calendars located in the upper left (#6 above). Click the arrows on either side of the current month to change months and click a specific date to change the main window to that date.

You can also change the dates displayed in the main window using ◀ ▶ icons in upper left of main window.

To quickly advance to a date that you cannot see on the Calendar; double click 📅 in the **Go To** section of the **Home** ribbon; Type the desired date in the **Date** field; Click **OK**.

To quickly return to today, click **Today** in the **Home** ribbon.

## Create an appointment

Appointments are activities that you schedule in your calendar that don't involve inviting other people or rooms.

1. In **Calendar** view, click **New Appointment**.
- OR
2. Right-click a time block in the Main Window and click **New Appointment**.
3. Appointment Form appears; complete the field details and click **Save & Close** in Ribbon.

## Schedule a meeting

In Outlook, a meeting includes other people and can include rooms. You'll get responses to your meeting requests in your Inbox.

1. In **Calendar** view, click **New Meeting**.
  2. A **New Meeting Request** appears.
  3. Complete the field details and click **Send**
- OR

1. Right-click a time block in the Main Window and click **New Meeting Request**.
2. **New Meeting Request** appears; complete the field details and click **Send**.

**NOTE:** From the **New Meeting Request** window you can click **Scheduling Assistant** in the **Meeting** Ribbon Tab to view attendees' calendars and select an ideal meeting date/time.

## Change your Response to a Meeting

1. Double click the meeting open it
2. Click the new desired response in Ribbon (Accept, Tentative, Decline)
3. Select the desired option to Edit the Response or Send the Response.

**NOTE:** Selecting Edit will allow you to add a note to the notification that the owner will receive regarding your response. Clicking Send will notify the owner of the meeting, but will not allow you to add a note. It is not recommended that select the Do Not Send a Response option as this will not

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notify the owner of your intent to attend or not attend and you will not get future meeting updates.

## To Edit an Appointment/Meeting that you own

1. Double click the event to open it
2. Make the desired changes
3. For a meeting, click **Send** – an updated message will be sent to all attendees; for an appointment, click **Save & Close**

## Edit an Appointment/Meeting that you do not own

When editing a meeting that you do not own, changes will not be sent to attendees – use this feature to add notes to your copy of the meeting.

1. Double click the event to open it
2. Make the desired changes
3. Click **Save & Close** –.

## Print a Calendar

1. Display the calendar and time period you wish to print.
2. Click **File** Ribbon Tab
3. Click **Print**
4. Change the settings as desired
5. Click **Print**

NOTE: You can only print one calendar at a time.

## Email your Calendar

If you receive a request to send your available times to someone, you can email your calendar with availability.

1. From **Calendar** view, **Home** Ribbon Tab, click **E-mail Calendar**
2. Select desired options
3. Click **OK**
4. Complete the **To...** and subject fields
5. Edit the message if desired
6. Click **Send**

## Share your Calendar

1. From the **Calendar** view, click the **Home** Ribbon Tab
2. Click **Calendar Permissions**
3. Click **Permissions** tab
4. Click **Add...** button and search for person(s) you wish to share calendar with
5. Click **OK**
6. User will receive default permission (listed in **Permission Level** field)
7. Click **Apply** and then **OK**

To change permission level for a person:

1. Highlight name in list of shared users
2. Click **Permission Level** and choose desired level (or make custom selections in **Read**, **Write**, **Delete**, **Other**)
3. Click **Apply** and then **OK**

OR

Follow these steps to send a message to another user notifying them that you shared your calendar and/or requesting that they share their calendar with you):


1. From **Home** Ribbon, click **Share Calendar**
2. Complete the **To...** field with the person(s) with whom you wish to share your calendar and/or request that they share their calendar.
3. Check the **“Request permission to view recipient’s Calendar”** checkbox, if desired
4. Leave the **“Allow recipient to view your Calendar”** checked, if desired
5. Recipient will have the default sharing permissions, to edit, follow steps in **Share your Calendar – To change permission level for person.**
6. Click **Send**



## View a Shared Calendar

To display a shared calendar for the first time:

1. From the **Calendar** view; **Home** Ribbon Tab
2. Click **Open Calendar** and select **Open Shared Calendar**
3. Select **Add Calendar... Open Shared Calendar**
4. Type name of user’s calendar you wish to view (last, first) or click **Name** button and search for user; highlight user’s name
5. Click **OK**
6. Calendar will appear in **Calendars** list.

After adding the shared calendar the first time:

1. Click the calendar name checkbox in the **Calendars** section (#6 above)
2. To hide it uncheck the calendar in **Calendars** section OR click  behind the calendar name in main window.

NOTE: When viewing multiple calendars, by default they show side by side. To combine calendars into one (each of a different color), click  next to the calendar name in the **Main Window**. To return them to side by side, click the  icon.

## Calendar Options

In **Calendar Options** you can change things such as work hours, the first day of the week, reminder defaults, and other settings.

1. Click **File** Ribbon Tab
2. Click **Options** in left menu
3. Click **Calendar** in **Outlook Options** window
4. Change settings as desired
5. Click **OK**

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