Outlook® 2013 Mail, Calendar, People, Tasks

Mail

Displaying Mail Folders

At the bottom of the main window [Click] Mail.

To show the Inbox, from the Folder Pane on the left, [Click] INBOX.

Hiding/Displaying the Folder Pane

- Choose VIEW, FOLDER PANE ➧ NORMAL, MINIMIZED, or OFF, or press <Alt-F1> to toggle among the modes.
- To display folders when minimized, from the left edge, [Click] ALL FOLDERS.

Creating and Sending a Message

1. Choose HOME, then NEW EMAIL.
2. In the TO or CC text boxes, type the names of the addressees. For an Internet address, type the full address (e.g., info@beezix.com). As you type, Outlook presents previously used addresses.
   Or to select names from the address book:
   a. Choose MESSAGE, then ADDRESS BOOK.
   b. Select a different ADDRESS BOOK if desired.
   c. Select the names. <Ctrl>- or <Shift>-[Click] to select multiple names.
   d. [Click] TO, CC or BCC. [Click] OK.
3. If any names are not underlined, choose MESSAGE, then CHECK NAMES or press <Ctrl-K> to validate them.
4. Type the SUBJECT and the message.
5. [Click] SEND.

Attaching a File

1. Choose MESSAGE, ATTACH FILE.
2. Select the file(s) to insert and [Click] INSERT.

Showing BCC

In the message window, choose OPTIONS then BCC.

Sending a Message with High or Low Importance

Choose MESSAGE then ! or ↓. To revert to normal importance, [Click] the button again.

Requesting a Read or Delivery Receipt

In the message window choose OPTIONS, then check REQUEST A DELIVERY RECEIPT or REQUEST A READ RECEIPT, or both.

Drafting a Message

If you are not ready to send a message, you can draft it and save it in a special folder.

1. Create the message.
2. Instead of sending the message:
   a. [Click] on the Quick Access Toolbar.
   b. Close the message window. The message is automatically placed in a folder called Drafts.
3. When you are ready to send the message:
   a. [Click] on the DRAFTS folder in the Folder Pane.
   b. [Double Click] on the message to open it.
   c. Finish the message, then [Click] SEND.

Delaying the Delivery of a Message

1. In the message window choose OPTIONS, DELAY DELIVERY.
2. Change the DO NOT DELIVER BEFORE date and time.
3. [Click] CLOSE.

Restricting Forwarding, Printing, Copying

To prevent a recipient of an email message from forwarding, printing or copying the message, choose OPTIONS, PERMISSION.

You and the recipient may be prompted to install Information Rights Management software and configure a certificate to enable this feature.

Quick Filters: All and Unread

- To show only unread messages in the Inbox, [Click] UNREAD at the top of the message list.
- To show all messages in the inbox, read and unread, [Click] ALL.

Reading Messages

An easy way to read messages is to use the Reading Pane.

1. If the Reading Pane is not already open, choose VIEW, READING PANE ➧ RIGHT or BOTTOM. You can change the size of the pane by [Dragging] the bar dividing the Reading Pane and the list of emails.
2. To read a message, [Click] on it to view it in the Reading Pane, or [Double Click] to open.
3. To safely, quickly preview an attachment:
   a. [Click] the attachment below the header, [Click] PREVIEW FILE if necessary.
   b. [Click] Message to return to the message.
4. To fully open an attachment in the application:
   a. [Double Click] the attachment. When prompted, [Click] OPEN. If you have the required program for reading the file, Windows starts the program and displays the attachment.
   b. When you have finished reading the attachment, close the program window to return to Outlook.

Manual Send/Receive

Outlook can be setup to automatically send a message immediately or send/receive periodically.

To manually send/receive press <F9> or choose SEND/RECEIVE, SEND/RECEIVE ALL FOLDERS or in the Quick Access Toolbar [Click].

Using the Outbox

The Outbox contains emails that are going to be sent. To edit or remove emails before they are sent:

1. [Click] OUTBOX in the Folder Pane.
2. Delete as usual. Or to edit, [Double Click] the message, edit as usual, [Click].

Messages that have been opened and closed without [Clicking] SEND will appear under SENT: NONE, and will not be sent.

To send, open the message then [Click].

Replying to a Message

1. Select or open the message.
2. Choose HOME or MESSAGE, then REPLY to reply to the sender only, or REPLY ALL to reply to all addressees.
3. Complete the message, then [Click] SEND.

Forwarding a Message

1. Select or open the message.
2. Choose HOME or MESSAGE, then FORWARD.
   Or to forward as an attachment, choose HOME or MESSAGE, More, FORWARD AS ATTACHMENT.
3. Complete the message then [Click] SEND.

Printing a Message

1. Select or open the message.
2. Choose FILE, PRINT.
3. Make any necessary changes and [Click] PRINT.

Saving an Attachment

1. View the message that contains the attachment(s).
2. [Right Click] on an individual attachment and choose SAVE AS or to select multiple attachments, choose SAVE ALL ATTACHMENTS. [Click] or <Ctrl>-[Click] to select/de-select attachments and [Click] OK.
3. Select the folder in which you want to save the attachment and [Click] OK or SAVE.

Removing an Attachment

[Right Click] attachment, choose REMOVE ATTACHMENT.

Using Desktop Alerts

Whenever a new email arrives, Outlook displays a Desktop Alert over top of the application that is currently being used. The Desktop Alert is a box which normally appears in the bottom right of the screen. It provides a brief summary of the email, and the ability to quickly open, flag, or delete the email.

- To open, [Click] on the email message.
- To delete, [Click].
- To flag, [Click].

Tip: Can't find the command you want? [Right Click] an item for available options.

Selecting Multiple Items / Messages

Consecutive items	[Click] on the first item and <Shift>-[Click] the last item.
Non-consecutive items	[Click] on the first item and <Ctrl>-[Click] on the others.

Note: Consecutive item selection for calendar items works only if using a list view.

Keyboard Shortcuts

From anywhere in Outlook, create a:	
Mail message	Ctrl-Shift-M
Contact	Ctrl-Shift-C
Contact Group	Ctrl-Shift-L
Appointment	Ctrl-Shift-A
Meeting Request	Ctrl-Shift-Q
Task	Ctrl-Shift-K
Task Request	Ctrl-Alt-Shift-U
Note	Ctrl-Shift-N
Folder	Ctrl-Shift-E
Go to Mail	Ctrl-1
Go to Calendar	Ctrl-2
Go to People	Ctrl-3
Go to Tasks/To-Do List	Ctrl-4
Go to Notes	Ctrl-5
Send/Receive	F9
Use Advanced Find	Ctrl-Shift-F
Go to a folder	Ctrl-Y
Show Inbox	Ctrl-Shift-I
From Mail:	
Go to the search box	F3 or Ctrl-E
Flag for follow up	Ctrl-Shift-G
Add a Quick Flag	Insert key
Reply to a message	Ctrl-R
Reply to all	Ctrl-Shift-R
Forward a message	Ctrl-F
Mark as unread	Ctrl-U
From Calendar:	
Go to a Date	Ctrl-G
Go to prev./next week	Alt-↑ or Alt-↓
Go to prev./next month	Alt-PgUp or Alt-PgDn

Deleting Messages

Hover over the message in a list and [Click] at the far right.

Or

1. Select or open the message(s) to delete.
2. Choose HOME or MESSAGE, then DELETE. The messages are moved to the Deleted Items folder.

Or to delete all messages in a folder, choose FOLDER, then Delete All. [Click] YES.

To empty the Deleted Items Folder:

[Right Click] the DELETED ITEMS folder, and choose EMPTY FOLDER, then [Click] YES.

Or, select the Deleted Items folder, then choose FOLDER, Empty Folder and [Click] YES.

Warning: This action cannot be undone.

Sorting Messages

Choose VIEW then a sort method in the ARRANGEMENT group. Or, [Click] a column heading such as SUBJECT, RECEIVED, BY DATE. To reverse sort order, [Click] the heading again or [Click] Reverse Sort.

Grouping Messages by Conversation

Arrange messages by conversation to group messages that are related (e.g., replies to a previous email).

To turn on/off grouping by conversation:

Choose VIEW, Date (if necessary), then check SHOW AS CONVERSATIONS. Specify whether to group ALL MAILBOXES or only THIS FOLDER.

- Conversations are indicated by . To show the conversation, including messages filed in another folder, [Click] .

Ignoring a Conversation

- To automatically delete existing and future messages from a conversation from all folders except Sent Items, select an email, then choose HOME, Ignore, [Click] OK, then [Click] IGNORE CONVERSATION.
- To stop ignoring and move all messages to the Inbox, select a message in the Deleted Items folder, then choose HOME, Ignore, then STOP IGNORING CONVERSATION.

Cleaning up Redundant Messages

To delete all messages with text that is found in a newer message, choose HOME, Clean Up, then specify whether to clean up folders/subfolders, or the selected conversation.

Turning Grouping On/Off

Outlook sorts messages in groups. The type of group depends on the sort order. E.g., when sorted by date received, Outlook groups messages by Today, Yesterday, etc.

To turn grouping on or off, choose VIEW, then [Click] in the ARRANGEMENT group, then select SHOW IN GROUPS.

Creating a Folder

1. Choose FOLDER, NEW FOLDER.
2. Type a name for the new folder.
3. If necessary, make a selection from the FOLDER CONTAINS drop-down list.
4. Select the parent folder, then [Click] OK.

Adding/Removing Favorite Folders

1. Select the folder in the Folder Pane.
2. Choose FOLDER, SHOW IN FAVORITES.

Moving or Copying Messages

From the list, select the message(s) to move or copy:

1. In the Folder Pane, ensure that you can see the folder into which you want to move or copy the messages by clicking or .
2. To move the selected messages, [Drag] them to a folder. Or to copy, <Ctrl>-[Drag].

If a single message is open or selected:

1. Choose HOME or MESSAGE, MOVE, or [Right Click] the message and choose MOVE
2. To move, select a recently used folder or, for a list of all folders, select OTHER FOLDER. Or to copy, select COPY TO FOLDER.
3. If necessary, select a folder then [Click] OK

Finding Mail Messages

1. In the Folder Pane, select the folder to search.
2. Enter search text in the search box above the list of messages. Outlook narrows down the list as you type.
3. To refine the search, choose options from the SEARCH TOOLS, SEARCH tab.
4. To clear the search results [Click] or press <Esc>.

Using Task Flags

Task Flags help identify and group messages that need follow up. Flagged items appear in the To-Do Bar, To-Do task list, and the Calendar Daily Task List.

- To flag a message: In the message list, [Click]

  In an open message, choose MESSAGE then [Click] FOLLOW UP.
  While viewing a message in the Reading Pane, choose HOME then [Click] FOLLOW UP.
  Finally, choose the preferred day.
- To mark a flag complete: [Click] the flag.
- To select a different date for follow up, add a reminder, or clear a flag: [Right Click] the flag, then select an option.
- To view incomplete flags: [Click] Tasks.
  If necessary, select TO DO LIST.

Using Quick Steps

To perform multiple commands with one click, choose HOME or MESSAGE then choose from the QUICK STEPS group. To create a Quick Step:

1. Choose HOME, then Create New.
2. Enter a NAME then CHOOSE AN ACTION then fill out the details.
3. To add more actions, [Click] ADD ACTION.
4. Optionally, specify a SHORTCUT KEY and TOOLTIP TEXT.
5. [Click] FINISH.

To edit, [Right Click] the Quick Step and choose EDIT.

Creating a Contact from a Message

Outlook automatically creates a contact in the Suggested Contacts folder for anyone you send to who is not in your Contacts.

To create a contact from a received message:

1. In an open message or the Reading Pane, [Right Click] on the person's name, and choose ADD TO OUTLOOK CONTACTS.
2. Add other necessary information, then [Click] SAVE.

Creating a Distribution List

Create a Contact Group if you frequently send mail to the same group of people.

1. Choose HOME, NEW ITEMS, MORE ITEMS ▸ CONTACT GROUP.
2. Type the group NAME.
3. [Click] ADD MEMBERS and select FROM OUTLOOK CONTACTS, FROM ADDRESS BOOK or NEW E-MAIL CONTACT. Add MEMBERS or fill out contact details. [Click] OK.
4. [Click] SAVE & CLOSE.

Creating an E-mail Signature

1. Choose FILE, OPTIONS.
2. [Click] MAIL, then Signatures....
3. [Click] NEW. Type a descriptive name then [Click] OK.
4. Under EDIT SIGNATURE type the information you want to insert at the end of every message.
   a. Format your text using the formatting toolbar.
   b. To add contact information in the form of a business card, [Click] Business Card.
   c. [Click] to insert a picture or logo.
   d. To hyperlink, highlight some text, [Click] .
5. If you wish to create additional signatures, [Click] SAVE then repeat steps 3 to 5 as needed.
6. Under CHOOSE DEFAULT SIGNATURE, select which signatures you would like to appear automatically in NEW MESSAGES and/or REPLIES/FORWARDS for a specific E-MAIL ACCOUNT. Select (NONE) if you want to manually insert the signature.
7. When done, [Click] OK, then OK again.

Manually Inserting a Signature

1. In a message, position the insertion point where you want the signature to appear.
2. Choose MESSAGE, SIGNATURE and select the desired signature from the list.

Using the Rules Wizard

The Rules Wizard allows you to set up instructions for incoming messages. E.g., Messages from a certain person are placed in a specific folder.

1. Choose HOME or MESSAGE, RULES.
2. Select a suggested rule.
   Or, choose CREATE RULE, select options. [Click] OK.
   If desired, check RUN THIS RULE NOW. [Click] OK.

To change or delete rules, choose HOME or MESSAGE, RULES, then MANAGE RULES & ALERTS.

Using the Out of Office Assistant

If using Outlook with an Exchange server, you can have Outlook automatically reply to messages when you are absent for some time.

1. Choose FILE, INFO, then AUTOMATIC REPLIES.
   a. Select SEND AUTOMATIC REPLIES.
   b. Optionally, specify START and END TIMES.
   c. On the INSIDE MY ORGANIZATION tab, type the reply you want to send out while you are away.
   d. Optionally, enter an OUTSIDE MY ORGANIZATION reply. Indicate whether to reply to anyone who sends you a message, or just those listed in Contacts.
2. To create rules to manage incoming messages while away, [Click] RULES. Fill out rule and [Click] OK.
3. [Click] . When the automatic reply system is active, an information bar appears below the Ribbon, and AUTOMATIC REPLIES is on the status bar.

Turning off the Out of Office Assistant

[Click] Turn off on the AUTOMATIC REPLIES information bar.

Or, in the status bar [Click] AUTOMATIC REPLIES, then select DO NOT SEND AUTOMATIC REPLIES. [Click] OK.

Handling Junk Mail

Messages identified as junk are moved to the junk e-mail folder and features are disabled including links and HTML layout.

If a legitimate message is put in your junk e-mail folder:

1. Select the message, choose HOME or MESSAGE, Junk, then NOT JUNK.
2. Check ALWAYS TRUST E-MAIL FROM to add the sender to your safe senders list. The message is moved into your Inbox with features enabled.

To change your settings, including adding/removing addresses from your safe and block lists, choose HOME, then Junk, then JUNK E-MAIL OPTIONS.

Calendar

Use the Calendar to schedule meetings and appointments.

Displaying the Calendar

At the bottom of the window [Click] Calendar.

Setting up Your Work Week

1. Choose FILE, OPTIONS, then CALENDAR.
2. Set options in the WORK TIME area. [Click] OK.

Viewing the Calendar

	Choose HOME, then:
One day	DAY
One work week	WORK WEEK
A 7-day week	WEEK
One month	MONTH
	In the Folder Pane:
Consecutive days	[Drag] through the days to display.
Non-consecutive days	[Click] the 1st day, <Ctrl>-[Click] on others.

Creating a Simple Appointment

1. [Click] on a time slot, or [Drag] for a longer appointment.
2. Type a description, then press <Enter>.

Creating an Appointment with More Detail

1. Choose HOME, NEW APPOINTMENT.
2. Complete the SUBJECT and LOCATION as needed. For START TIME and END TIME, you can type words like *next week*, *tomorrow*, *3 months*, etc. instead of entering dates.
3. [Click] SAVE & CLOSE.

Creating and Scheduling a Meeting

A meeting is an appointment to which you invite others.

1. Choose HOME, NEW MEETING. Or open an existing appointment then choose APPOINTMENT, INVITE ATTENDEES.
2. In the TO box, type the names of the people you want to invite. You can also [Click] To... to select names from the address book.
3. Enter the details of the appointment.
4. To plan around attendees' schedules, choose MEETING, SCHEDULING ASSISTANT.
   - New attendees are added as *required attendees* by default. To change, [Click] .
   - To lengthen or shorten the meeting time, [Drag] the blue vertical lines.
   - The ROOM FINDER Pane will show suggested times for the meeting, based on the number of attendees available. [Click] to change the date/time of the meeting.
   - [Click] OPTIONS to show calendar details, or to change AutoPick settings.
5. When the information is complete, [Click] Send.

Scheduling only shows an attendee's available time when connected to an Exchange server, or when Internet Free/Busy is set up.

Changing Entry Date or Time by Dragging

1. [Click] on the appointment, meeting, or event. A black border appears around the outside of the calendar entry.
2. To change the length of the entry [Drag] the white bullet handles. To change the time or date [Drag] the entry to a different time or day in either the main calendar area or the Folder Pane.
3. [Click] outside the selected calendar entry.
4. If changing a meeting, you are asked to save the changes and send an update. [Click] OK then SEND UPDATE.

Note: You cannot change a meeting time without sending an update.

Editing an Appointment or Meeting

1. [Double Click] the appointment or meeting to open it. If it is a recurring appointment or meeting, select JUST THIS ONE or THE ENTIRE SERIES.
2. Make your changes. If you are changing an appointment, [Click] SAVE & CLOSE. If changing a meeting, [Click] SEND UPDATE to notify attendees.

Responding to a Meeting Request

When you are invited to a meeting, you can respond by [Clicking] ACCEPT, TENTATIVE, or DECLINE in the Reading Pane or Ribbon. Respond to any prompts on the screen. Unless declined, the meeting is automatically entered in your calendar.

To propose a new time:

1. In the Ribbon or Reading Pane, [Click] PROPOSE NEW TIME. For options, [Click] the down arrow then select TENTATIVELY AND PROPOSE NEW TIME.
2. Change the time then [Click] PROPOSE TIME.
3. Fill out the response email, then [Click] SEND.

Repeating Appointments or Meetings

1. [Double Click] the appointment or meeting to open it.
2. Choose APPOINTMENT or EVENT or MEETING, then RECURRENCE.
3. Complete the information and [Click] OK.
4. [Click] SAVE & CLOSE.

Printing the Calendar

1. Choose FILE, PRINT.
2. Select a style from the SETTINGS list.
3. To change the date range, [Click] Print Options then change the PRINT RANGE.
4. [Click] PRINT.

Viewing Multiple Calendars

- In the Folder Pane, check the calendars you wish to view.
- To overlay one calendar on top of another, [Click] in the calendar title.
- To remove an overlay, [Click] .
- To bring an overlaid calendar to the front, [Click] the calendar's tab.
- To arrange calendars vertically, choose HOME, SCHEDULE VIEW.
- To close a calendar, uncheck it or [Click] .

Creating a Calendar Group

A calendar group is a saved set of people and resources which can be recalled to quickly view the group's free time and schedule meetings.

To create a new calendar group:

1. Choose HOME, CALENDAR GROUPS then CREATE NEW CALENDAR GROUP.
2. Type a name for the calendar group, [Click] OK.
3. Type the names of the group members or select from the list. [Click] the drop-down ADDRESS BOOK list to select from another address book. [Click] OK.

Using a Calendar Group

1. In the Folder Pane, select a calendar group.
2. To display calendars in rows (useful to compare available times), choose HOME, SCHEDULE VIEW.
3. **To make a meeting with an individual:**
   a. [Click] or [Drag] in the individual's calendar.
   b. Choose HOME, NEW MEETING, then select NEW MEETING.
   c. Fill out the details then [Click] .

To make a group meeting:

a. Choose HOME, NEW MEETING, then select NEW MEETING WITH ALL.
b. Fill out the details then [Click] SEND.

People

Maintain lists of contacts and companies with addresses, phone numbers, e-mail addresses, web sites and more.

Displaying People

At the bottom of the window, [Click] People. If necessary, select a view from the Current View group on the HOME tab.

Creating a Contact

1. Choose HOME, NEW CONTACT.
2. Complete the information. For additional fields such as Spouse, [Click] CONTACT, Details.
3. To save the contact [Click] SAVE & CLOSE. Or, to save and create a new one, choose CONTACT, Save & New then an option.

Editing a Contact

1. In People view (HOME, PEOPLE):
   - [Double Click] on the contact to edit most details. [Click] ⊕ then choose the item to change.
   - For the full contact card where all details can be edited, in the Reading Pane under VIEW SOURCE, [Click] OUTLOOK (CONTACTS).

   In other views, [Double Click] on the contact for the full contact card.
2. Make changes, then [Click] SAVE or SAVE & CLOSE.

Linking Contacts

If you have multiple contact cards for a person, you may link them together.

When linked, the People view (HOME, PEOPLE) shows details amalgamated from all the contacts when any one linked contact is selected.

1. Select the contact in the People view.
2. In the Reading Pane [Click] LINK CONTACTS.
3. In the LINK ANOTHER CONTACT field, type a few characters of the person's name.
4. [Click] the alternate contact card listed and [Click] OK.

Editing contact information in the People view changes ***all*** linked contacts. If you only wish to change one of the linked records, open it in a different view, such as CARD.

Deleting a Contact

To delete an individual contact:

Select contact, press <Delete> or [Click] DELETE.

To delete a linked contact:

As the People View shows amalgamated information, making it difficult to know which linked contact is being deleted, it is recommended you switch to another view, e.g., LIST, before deleting linked contact information.

1. Select a view, other than the People view.
2. Select contact, press <Delete> or [Click] DELETE.

Searching for People

To search in a specific Outlook contact folder:

1. [Click] on a contact folder in the Folder Pane.
2. To search across all attached Outlook Address Books, type a name, or part of a name, in the SEARCH CONTACTS field Search Contacts, then press <Enter>.
3. To refine your search, select from the SEARCH TOOLS, SEARCH tab.

To search across all attached Outlook Address Books:

1. In any Outlook folder, choose HOME then [Click] in the SEARCH PEOPLE field Search People.
2. Type the name, or part of the name, of the person you are searching for, then press <Enter>.

To attach a contact folder for Outlook Address Book searches:

1. [Right Click] the folder name and choose PROPERTIES.
2. [Click] OUTLOOK ADDRESS BOOK, then select SHOW THIS FOLDER AS AN E-MAIL ADDRESS BOOK. [Click] OK.

E-Mailing a Contact

1. Select the contact(s). Multiple contacts may be selected in any view except People view.
2. In the People view, [Click] , or its drop-down arrow to select a specific e-mail address. In other views, choose HOME, E-MAIL .
3. A message opens with the contact's email address. Complete the message. [Click] SEND .

Connecting to a Social Media Site

1. In the Folder Pane, [Click] CONNECT TO A SOCIAL NETWORK
2. Choose the preferred network. E.g., LINKEDIN.
3. Provide account credentials.
4. For Outlook to automatically log into this account in the future, [Click] REMEMBER MY PASSWORD.
5. Set other options as required then [Click] CONNECT.

Viewing Social Media Updates

1. Select the contact in the People view.
2. [Click] WHAT'S NEW.

This feature requires that social networking credentials be entered into Outlook.

Merging with Contacts

Merge contacts into a Word document for letters or labels or into a general e-mail for bulk messages.

1. Select or display the contacts to merge.
2. Choose HOME, MAIL MERGE .
3. Specify CONTACTS and FIELDS TO MERGE. Choose DOCUMENT TYPE and where to MERGE TO. [Click] OK.
4. Complete the document or e-mail, using Word's INSERT MERGE FIELD button to access data from the contacts.
5. Preview and check the personalized messages.
6. [Click] the FINISH & MERGE button.
7. If necessary, for MERGE TO E-MAIL, [Click] OK.

Tasks and To-Do Items

Use the Task and To-Do features to create and manage a "to do" list. A task is something you want to track until it is completed. The To-Do list combines incomplete tasks with email and contacts that have been flagged with a Follow Up Flag.

Displaying To-Do and Task List Folders

1. At the bottom of the window, [Click] Tasks. The last list you were viewing is displayed.

- To show just tasks, from Folder Pane on the left, [Click] TASKS.
- To show both incomplete tasks and flagged to-do items, from the Folder Pane, [Click] TO-DO LIST.

Creating a Task Quickly

[Click] in the Task entry bar above the task list or in the To-Do Bar (CLICK HERE... or TYPE A NEW TASK) and type the description. Press <Enter>. To add more tasks, continue typing task descriptions, pressing <Enter> after each one.

Creating a Task with More Detail

1. From anywhere in Outlook, choose HOME, NEW ITEMS, and select TASK or press <Ctrl-Shift-K>.
2. Complete the SUBJECT, DUE DATE, START DATE and other information. [Click] SAVE & CLOSE .

Putting an Item in the To-Do List

Tasks are automatically put on the To-Do list. To put a message or contact on the To-Do list:

1. Open or select the item.
2. Choose HOME, FOLLOW UP .
3. Select a follow up date, NO DATE, or CUSTOM for more options. Close the item.

Or, if available, [Click] in a list of messages or contacts.

Changing the Order of Tasks

If tasks are not sorted, you can change their order by [Dragging] the task to a new position in the list. To clear a sort, see **Sorting Items** below.

Editing a Task

You can edit tasks directly in the task list by [Clicking] in the field to change. To change other details:

1. [Double Click] the subject of the task to open it.
2. Make changes, then [Click] SAVE & CLOSE .

Assigning a Task

A task can be assigned to another person. If the person accepts an assigned task it appears in their task folder. A copy of the task remains in your Task folder. Whenever the assignee changes the task, your copy is updated. When the task is complete you will receive a completion status report.

1. With a task open, choose TASK, ASSIGN TASK . A TO: field is added.
2. Type the name or email of the assignee.
3. [Click] SEND.

Marking a Task Complete

In a folder, check ☐ next to the task, or select the task and choose HOME, MARK COMPLETE . Or, if the task is open, choose TASK, MARK COMPLETE or change STATUS to COMPLETED.

Show Tasks and To-Dos in any Area of Outlook with the To-Do Bar

In any area of Outlook choose VIEW, TO-DO BAR ➧ TASKS. The To-do bar can also show favorite PEOPLE for quick access to their contact cards, and a mini-calendar with appointments listed (CALENDAR).

Viewing To-Do Items in the Calendar

The Daily Task List shows the tasks and to-do items in the calendar at the bottom of each day (Day and week views only). From the Calendar area:

- Choose VIEW, DAILY TASK LIST ➧ NORMAL.
- To switch between Normal and Minimized, [Click] or .
- To manage a to-do item, [Click] on the item then select from the DAILY TASK LIST TOOLS tab.

Printing Tasks

1. If you do not want to print all tasks, select the tasks.
2. Choose FILE, PRINT.
3. Select TABLE STYLE (a list of all tasks) or MEMO STYLE (one task per page).
4. To select options such as to print either selected or all rows when using table style, [Click] Print Options and make changes. [Click] PRINT.

For Any Outlook Item

Deleting Items

Select the item, then [Click] DELETE .

Meetings cannot be deleted, ony cancelled: Open the meeting then choose MEETING, CANCEL MEETING. [Click] SEND CANCELLATION .

Assigning an Item to a Category

This may not be available if you use an IMAP account.

1. Select the items to categorize.
2. On the first Ribbon tab, [Click] CATEGORIZE .
3. Select a category from the recently used list, or select ALL CATEGORIES then choose a category.

For mail items in the wide display and tasks in the To Do list, [Click] to assign to a default category.

- To sort by category, choose VIEW, then CATEGORIES from the ARRANGEMENT group. To show/hide items in each category, [Click] or next to the heading or choose VIEW, Expand/Collapse then an option.

Sorting Items

Choose VIEW then a sort method in the ARRANGEMENT group. To reverse the sort, choose VIEW, Reverse Sort. Or [Click] the headings at the top of the list of items

To clear a sort:

1. Choose VIEW, VIEW SETTINGS .
2. [Click] SORT, then [Click] CLEAR ALL. [Click] OK twice.

Note: Sorting is only available with Calendar items if using the List or Active view.

Creating a New Calendar/Contact/ Task Folder

1. Navigate to Calendar, People or Tasks.
2. Choose FOLDER, then NEW FOLDER or NEW CALENDAR.
3. Type a NAME, then [Click] OK.

Sharing Calendar, People, Tasks, Notes Using an Exchange Server

1. Navigate to the folder to share, then choose FOLDER, SHARE CALENDAR (or CONTACTS, TASKS, or NOTES).
2. Type in the email address of the person you are sharing your folder with.
3. To see the recipient's calendar, [Click] REQUEST PERMISSION TO VIEW RECIPIENT'S...
4. [Click] SEND.
5. [Click] YES to confirm sharing a read-only copy of your calendar, contact, task, or notes folder.

Using Another Person's Calendar, Contacts, Tasks, or Notes Folder

Only available when connected to an Exchange Server.

1. Select the desired area (Calendar, Contacts, Tasks, or Notes) in the Navigation Pane.
2. To open a shared calendar, choose FOLDER, OPEN CALENDAR, OPEN SHARED CALENDAR. Or, to open shared contacts, tasks or notes, choose FOLDER, OPEN SHARED CONTACTS (or TASKS or NOTES).
3. Type the name of the person, or [Click] NAME to choose from a list. [Click] OK. If you do not have permission to view the folder, you will be prompted to send a sharing request.

The new folder will open and appear in the folder list in the Navigation Pane.

Responding to a Sharing Request

To allow or deny a request to view a folder:

1. [Click] ALLOW , or DENY .
2. Delete the sharing request email or keep to easily allow or deny access in the future.

Using the Reading Pane

View appointments, contacts, and tasks without opening them using the Reading Pane. To turn the pane on or off, choose VIEW, READING PANE RIGHT, BOTTOM, or OFF.

Using the People Pane

The People Pane is a part of the Reading Pane that shows information such as email history, RSS feeds, and social media updates about a person.

- To show/hide, choose VIEW, PEOPLE PANE then an option.
- To view details and communications for a person, [Click] their picture.

Need to know more? See our other Office guides.

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