

Advanced Features - Quick Reference Card

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**.

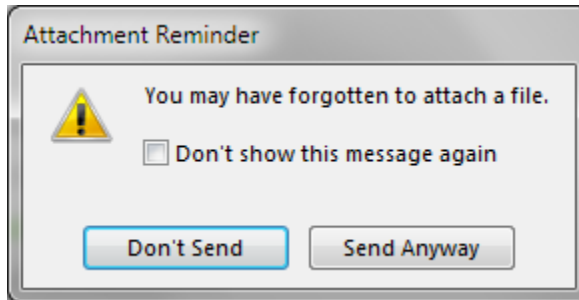
Name the new folder and then select the type of items you want to store in the new folder. Select the folder you want to add the new one to and click **OK**.

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?

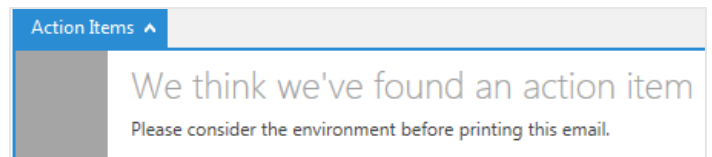
Attachments

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.



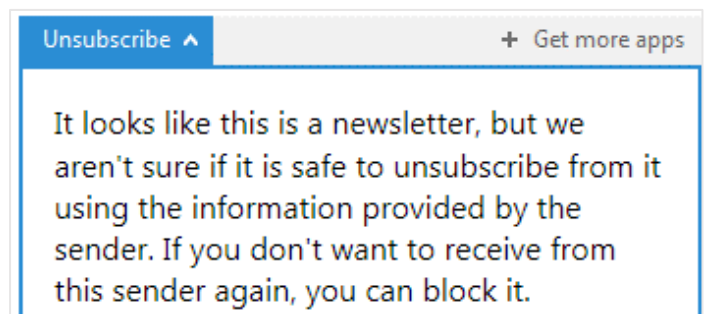
Action Items App

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

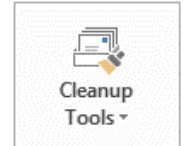
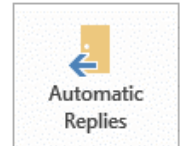
There are 3 ways to quickly find information in Outlook:

1. Use keywords, or phrases in the **Search Current Mailbox** field and press **<Enter>** or the **Search** 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**.

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**.

Important Note



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

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.



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.