Outlook®

TIPS, TRICKS & TECHNIQUES

SkillPath®

NST™
National Seminars Training

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Outline

Email Features

- Adding contacts using email messages
- Creating distribution lists
- Using stationery
- Creating a signature
- Adding names to the Blocked and Safe Sender lists
- Changing security settings in Outlook®

Organizing Outlook

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- Using the Advanced Find feature
- Creating rules
- Updating your contacts with vCards
- Assigning categories to your contacts
- Creating a custom view
- Using grouped views

Maximizing the Calendar Function

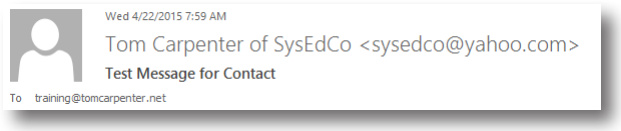
- Converting tasks to appointments
- Setting reminders
- Color-coding your appointments
- Scheduling an event
- Changing calendar views

Adding Contacts Using Email Messages

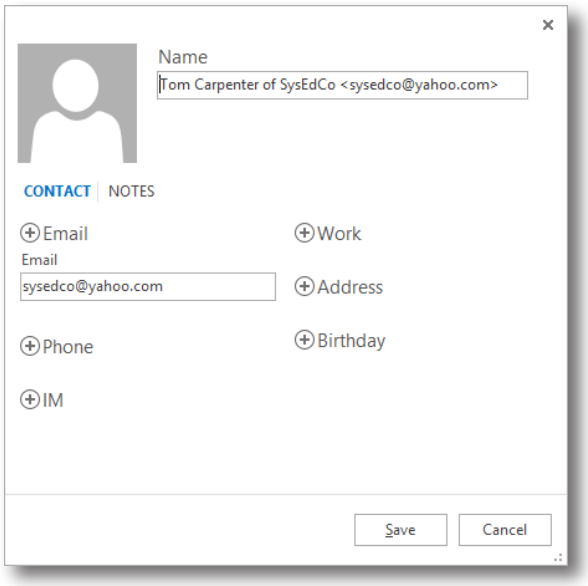
Use an inbox message or a message in another folder to add a sender's name and email address to your Contacts list.

1. Select the **Mail** option in the navigation pane and navigate to the target message

2. Hover over the name of the sender (Tom Carpenter of SysEdCo in the following image)



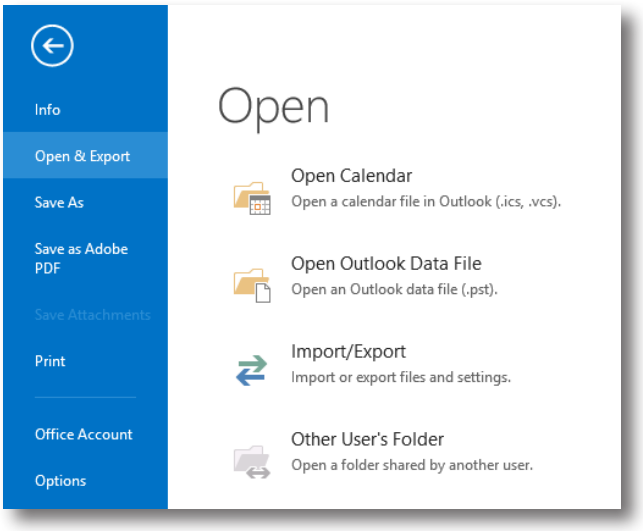
3. Click the down arrow in the box that appears and then click the **Add** link
4. Enter the information you desire for the contact form the email source data using copy-and-paste procedures



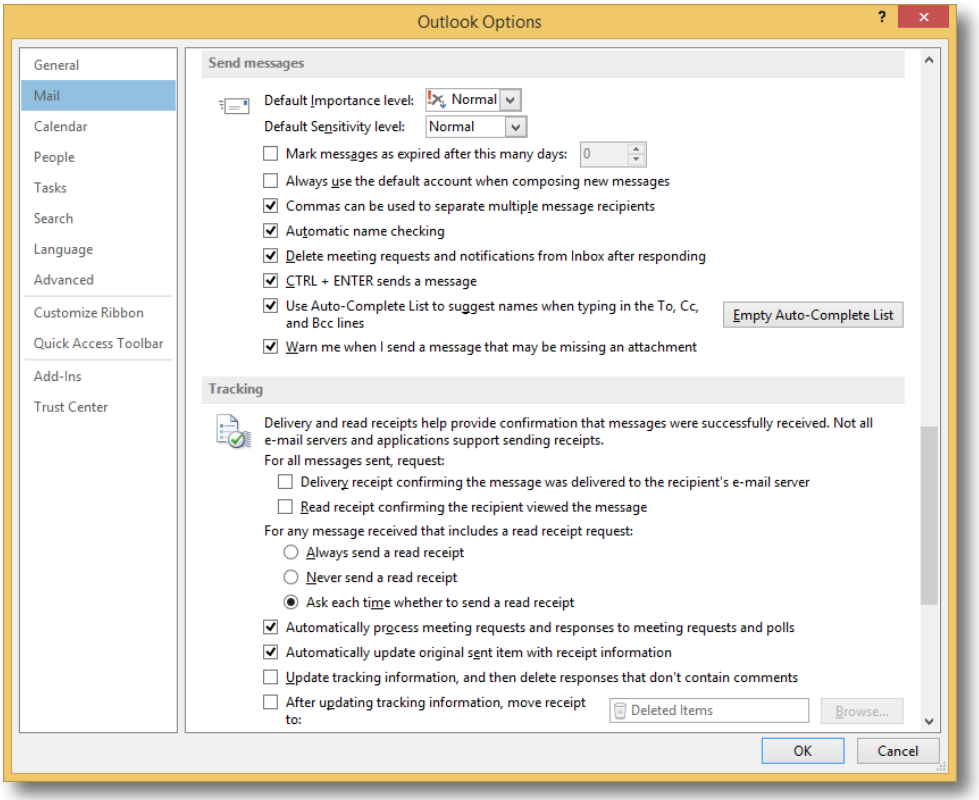
Email Features

Other methods of adding contacts include importing contacts from an external data source:

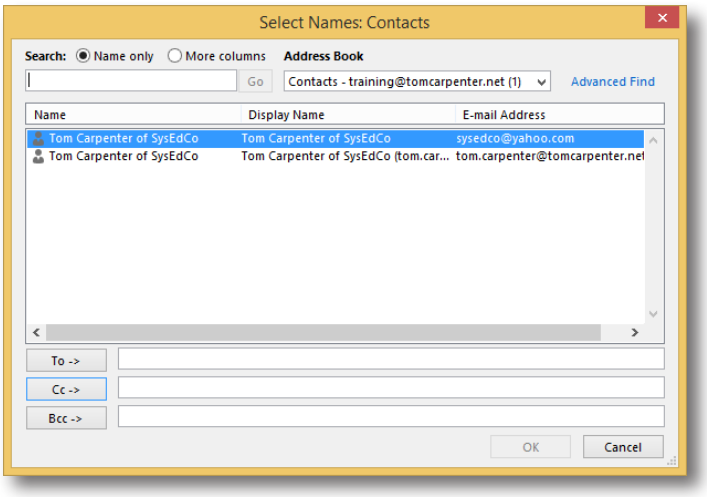
1. Click the **File** tab to access Office Backstage
2. Select the **Open & Export** page
3. Choose the **Import/Export** option



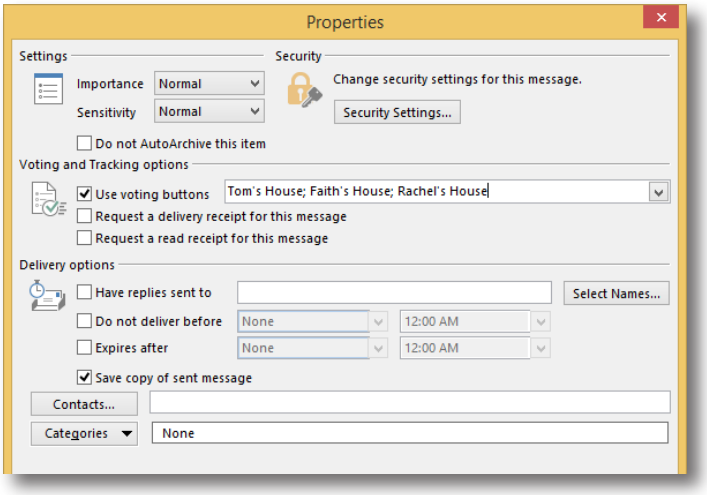
Setting the Send Message Options



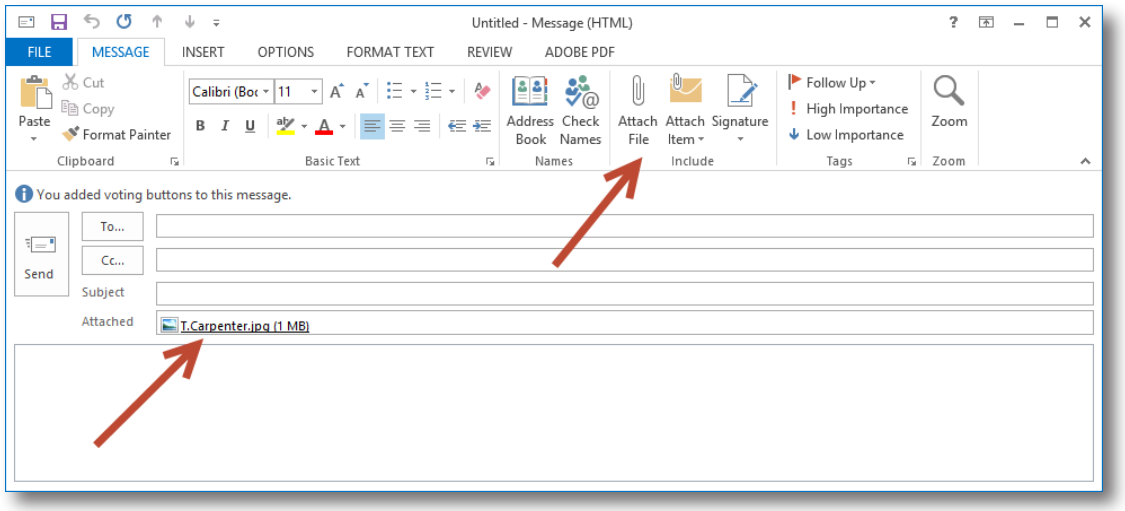
Sending Carbon Copies (CCs) and Blind Carbon Copies (BCCs)



Voting Options



Attachments

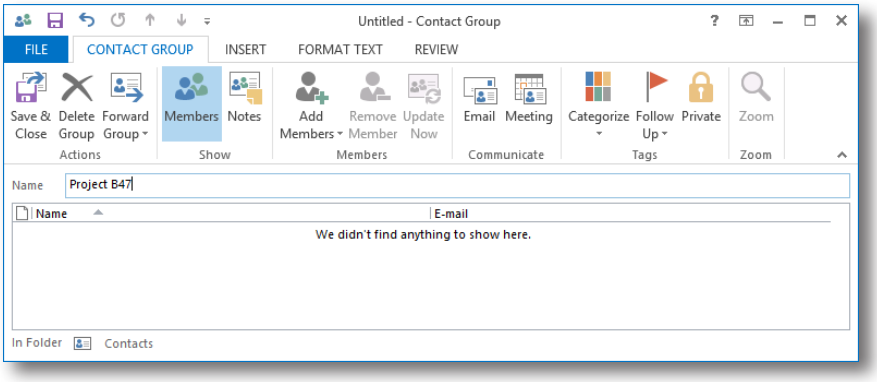


Creating a Contact Group

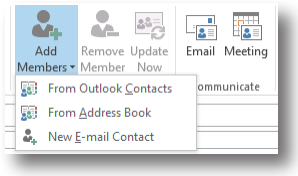
A distribution list, now called a contact group in Outlook® 2010 and later, including 2013, allows you to make one entry in order to send mail to a group of people.

1. Click the **People** selection in the left navigation panel or press **Ctrl+3** (NOTE: Pressing Ctrl+1 goes to **Mail**.)
2. Click the **New Contact Group** button on the **Home** tab of the ribbon

3. Enter a name for the Contact Group in the **Name** field as shown here:



4. Click the **Add Members** button on the **Contact Group** tab of the ribbon and select **From Outlook Contacts**, **From Address Book** or **New E-mail Contact** according to your needs

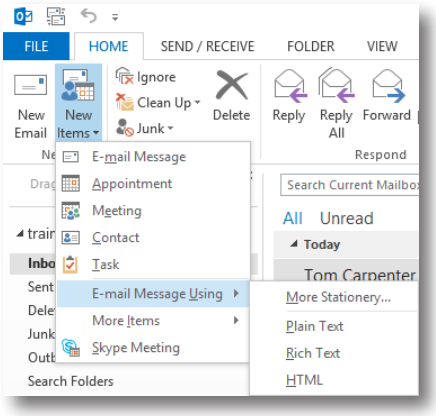


5. Click the **Save & Close** button on the **Contact Group** tab of the ribbon

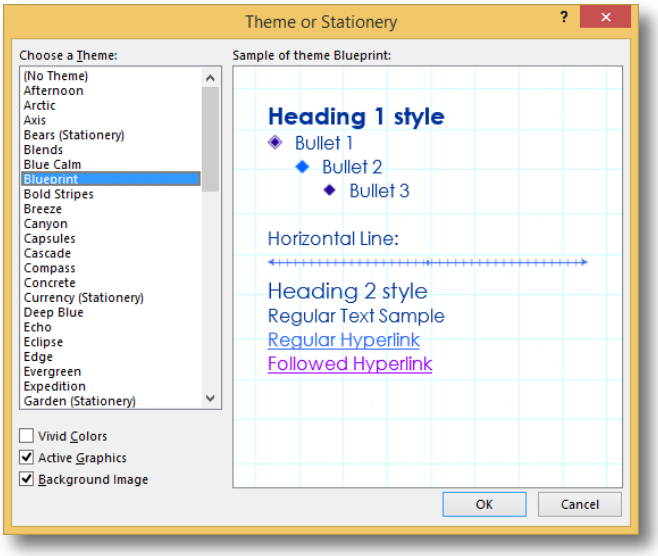
Using Stationery

Use stationery to change the look of your emails, but remember that some email applications cannot display stationery so there is no guarantee your email will be seen as intended.

1. Begin creating a new email message by navigating to the **Mail** section on the left navigation panel (or pressing **Ctrl+1**) and then choosing **New Items > E-mail Message Using > More Stationery** on the **Home** tab of the ribbon bar



2. In the **Theme or Stationery** dialog box, select the desired theme and features and then click **OK**

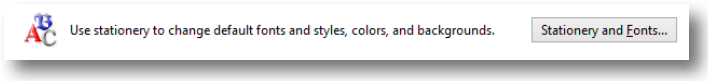


3. Compose and send the desired email message

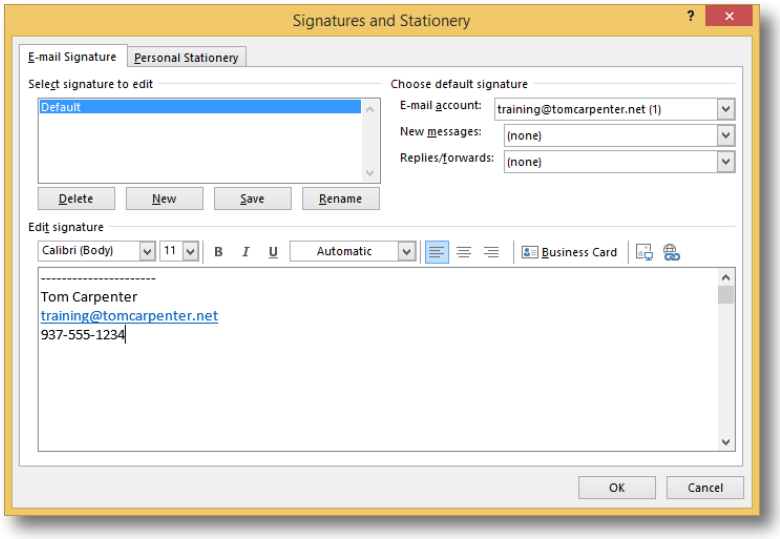
Creating a Signature

A signature allows uniformity of contact information within every email message you compose.

1. Click the **File** tab and select **Options**



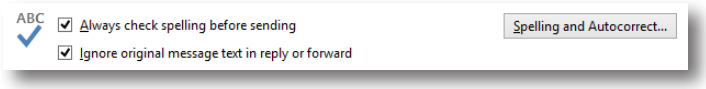
2. In the **Outlook Options** dialog box, select the **Mail** page
3. Click the **Signatures** button
4. Click the **New** button and provide a name for the signature
5. Enter the desired information to be used in your signature using the **Edit Signature** section
6. Ensure that the proper settings are configured for **E-mail Account**, **New Messages** and **Replies/Forwards**, then click **OK**



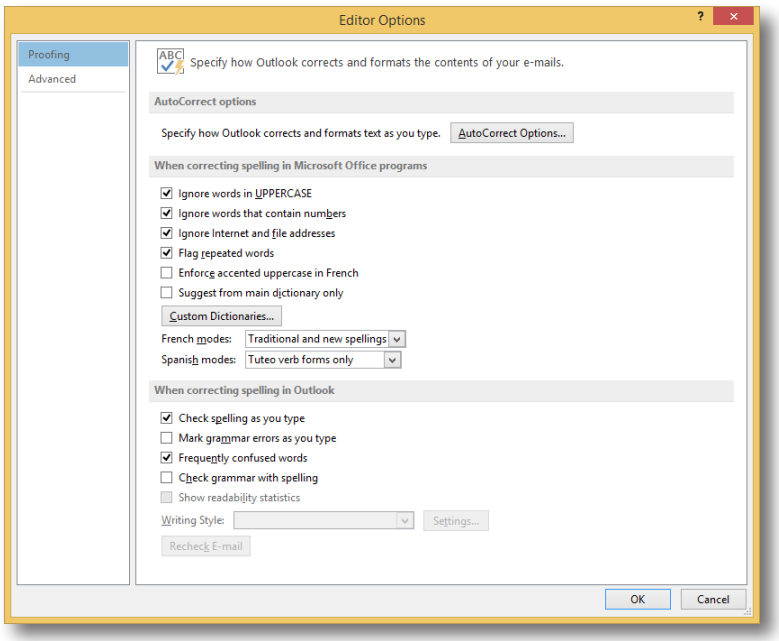
Using the Automatic Spell Check

Credibility is essential to good communication. Using automatic spell check can save you from embarrassing typos that result in the loss of credibility. To ensure automatic spell check is enabled:

1. Click the **File** tab on the ribbon and choose **Options**
2. In the **Outlook Options** dialog box, select the **Mail** page
3. Check the **Always check spelling before sending option**, if you desire to have it enabled



4. Click the **Spelling and AutoCorrect** button and then configure settings as desired

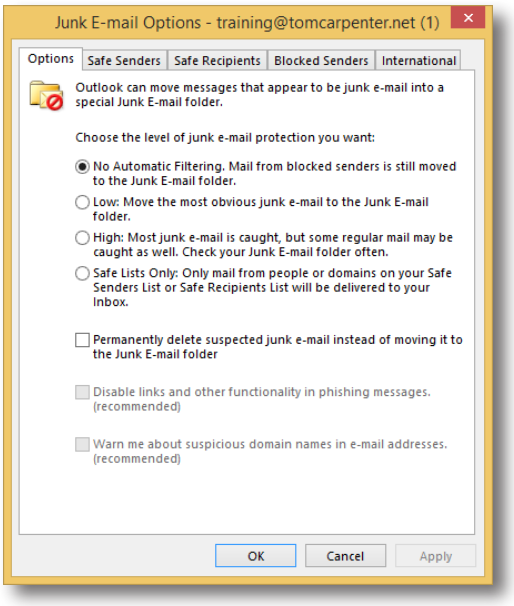


Adding Names to the Blocked and Safe Sender Lists

Spam is a common problem for email users; however, not receiving important messages because they are flagged as spam is an equally troubling problem. You can configure specific email senders to be blocked or allowed by the Outlook® spam engine.

1. Select the **Mail** section in the left-hand navigation panel
2. Right-click on a message you wish to mark as spam and choose **Junk > Block Sender**
3. Right-click on a message you wish to mark as not spam and choose **Junk > Never Block Sender**

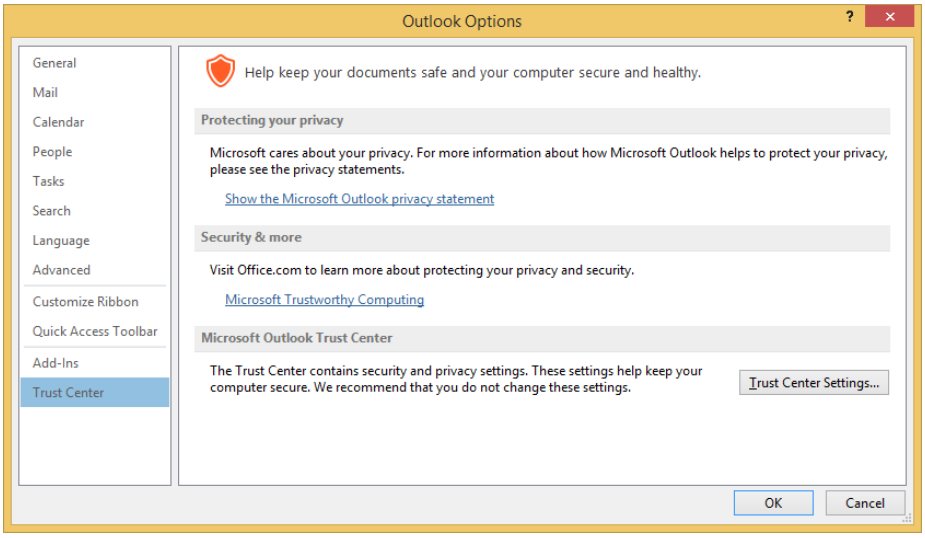
You can also manage these settings globally by selecting **Junk > Junk E-mail Options** on the **Home** tab in the **Delete** group.



Changing Security Settings in Outlook®

Phishing attacks, social engineering and email tracking are all "attack" methods that can be performed by unethical attackers against email users. Phishing attacks are used to get information from you that you should not provide—they are prevented through awareness of these attack methods and simply not responding. Social engineering attacks are similar, except they strictly involve human social manipulation and phishing attacks will add the concept of legitimacy through the use of well-known brand logos, twin Web sites and such. Email tracking is performed by embedding images in emails that are actually stored on Web servers. When the image is displayed in the email, the attacker receives a hit on the Web server and now knows the email is a valid target with a real user on the other end.

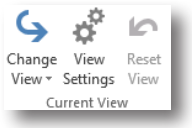
To assist in addressing such issues and others, Outlook provides security settings, which can be configured in the **Trust Center**. Access it by selecting the **File** tab and choosing **Options**. Then select the **Trust Center** page from the left navigation panel.



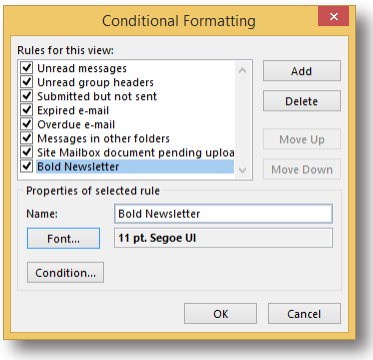
Color-coding Email Messages

Versions of Outlook® before 2010 had the **Organize** feature, which was used to automatically create formatting rules. Outlook 2010 and later versions no longer include this feature, and **Conditional Formatting** rules must be created manually to perform the same function.

1. When in the **Mail** section, select the **View** tab on the ribbon
2. Click the **View Setting**s button in the **Current View** group



3. In the **Advanced View Settings** dialog box, click the **Conditional Formatting** button
4. In the **Conditional Formatting** dialog box, click the **Add** button to add a new condition
5. Enter a title that is meaningful to you in the **Name** field
6. Click the **Condition** button to select the appropriate condition. When finished, click **OK**.
7. Click the **Font** button to set the formatting for the condition. When finished, click **OK**.
8. Click **OK** to save the new condition



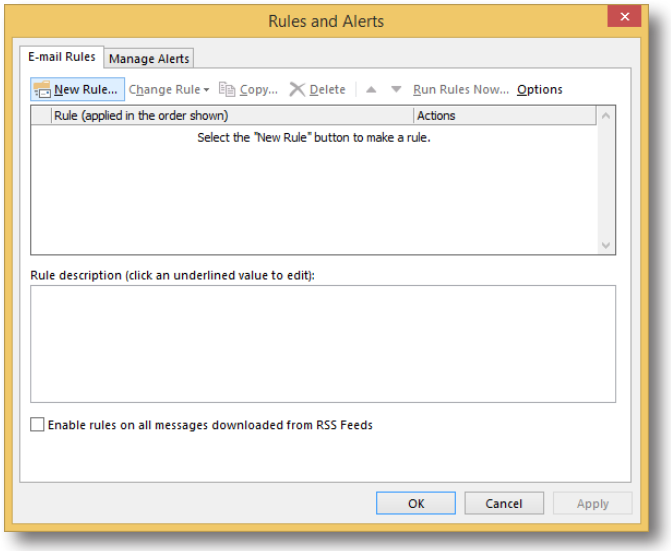
9. Click **OK** again in the **Advanced View Settings** dialog box to apply the new condition to the current view

NOTE: You can click the **Reset View** button on the **View** tab of the ribbon at any time to revert the view to the default configuration, including the removal of all conditional formats you've created.

Creating Rules

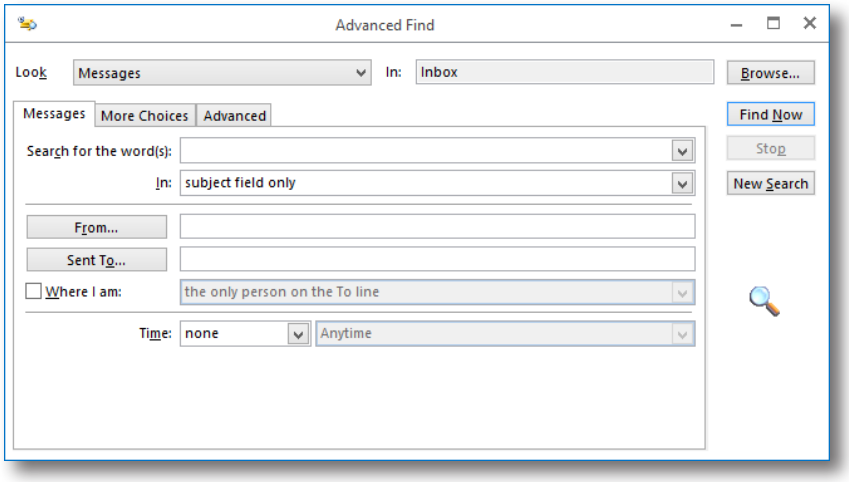
Rules are applied when messages arrive in your inbox or when messages are sent. Rules can be created in several ways:

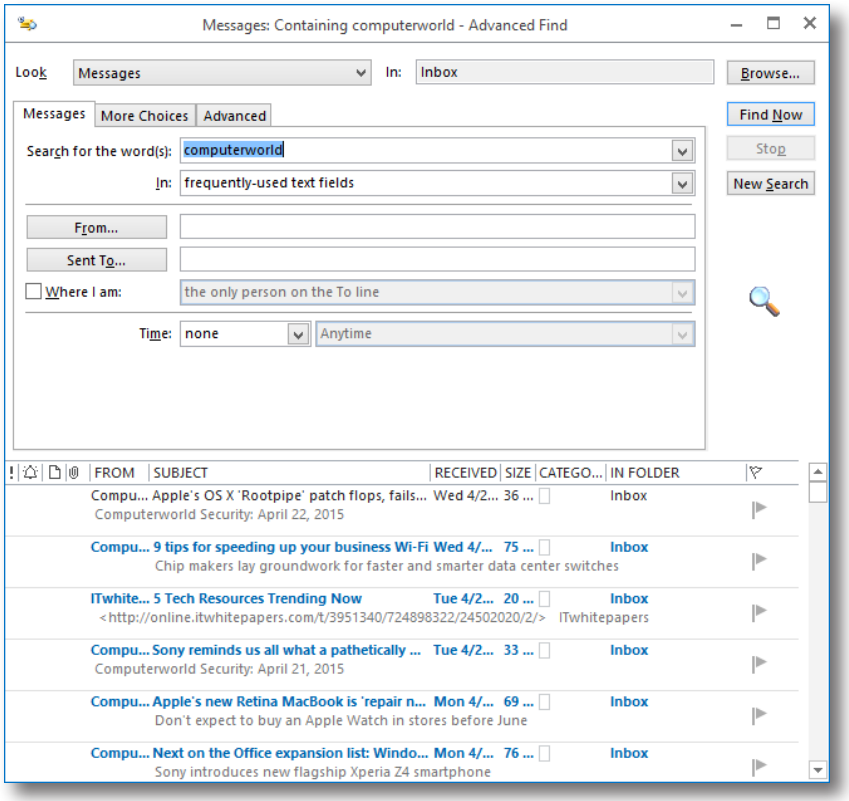
- Right-click an email and choose **Rules > Create Rule**
- Click on an email and choose **Rules > Create Rule** from the **Home** tab on the ribbon
- On the **Home** tab of the ribbon, choose **Rules > Manage Rules and Alerts**



Using the Advanced Find Feature

Before Outlook® 2010, you could access an **Advanced Find** function from the search **Options** menu. Outlook 2010 and later, including 2013, lack this feature; however, you can access the **Advanced Find** search dialog box using the shortcut **Ctrl+Shift+F.**

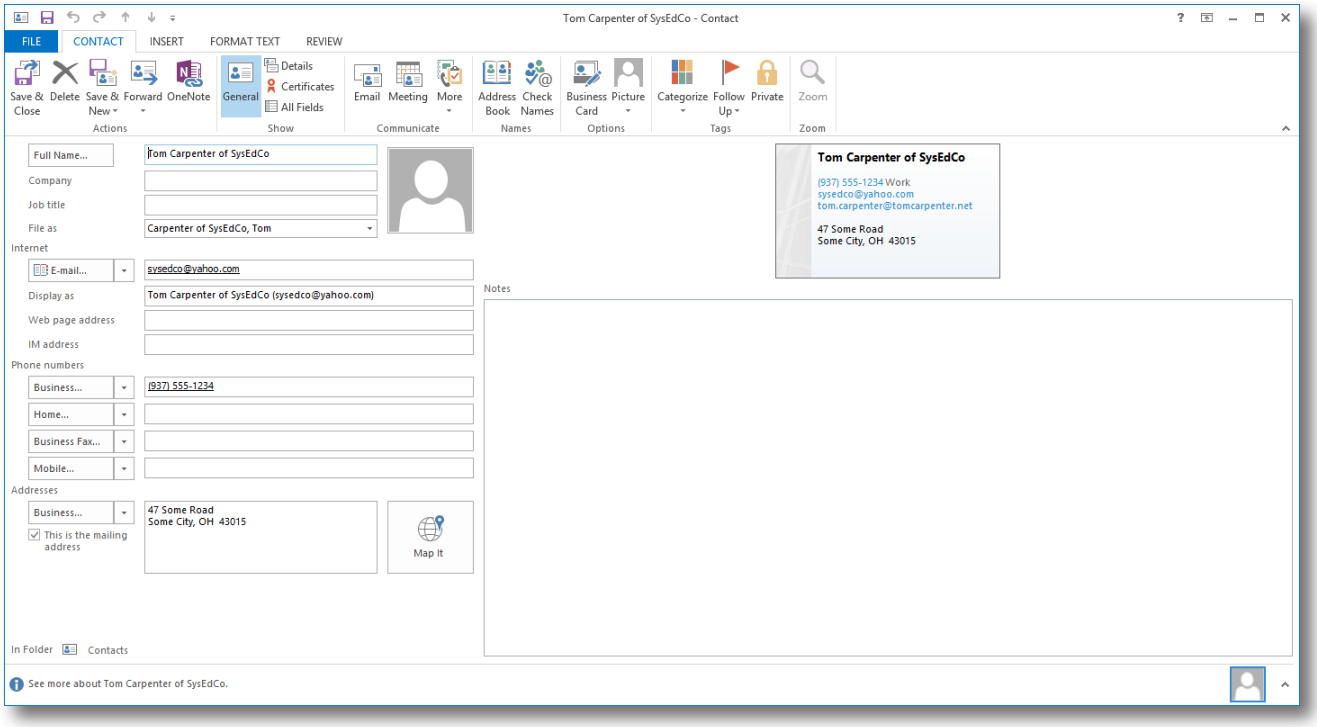




Updating Your Contacts With vCards

When a message in the inbox contains a vCard attached, it's easy to access information about the sender and add it to your **Contacts/People** in just a couple of clicks.

1. Double-click on the email attachment and choose **Open** in the Opening Mail Attachment dialog box
2. Review the Contacts dialog box
3. Click **Save and Close**



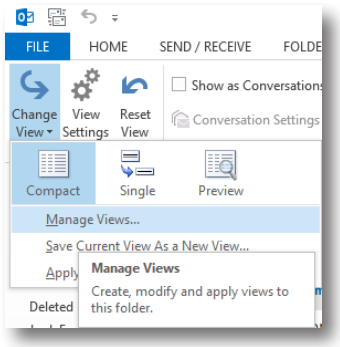
Creating a Custom View

Custom views allow you to change the appearance of view contents, including:

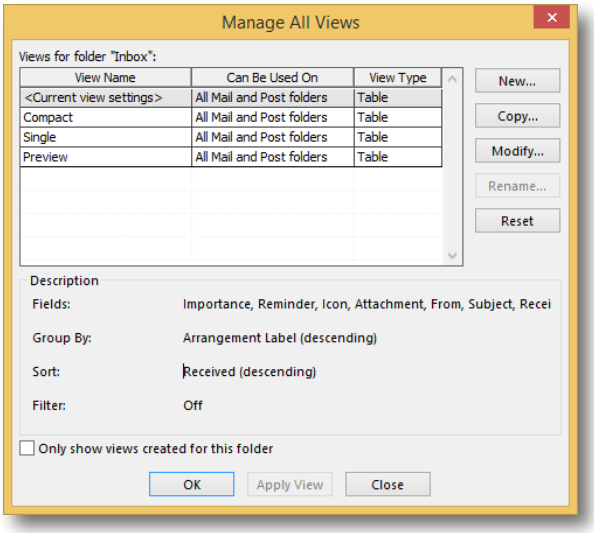
- Filters
- Conditional formats
- Columns
- Groupings
- Sorting method

To create a custom view:

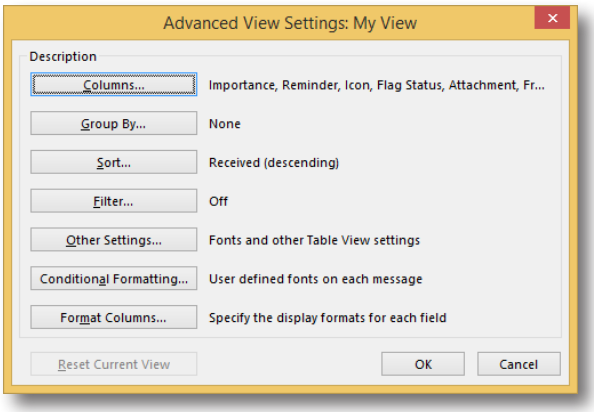
1. Select the **Mail** or **Calendar** section from the left navigation panel
2. Click the **View** tab on the ribbon
3. Select the **Change View** button in the **Current View** group and then select **Manage Views**



4. In the **Manage All Views** dialog box, click either **New** to create a view from scratch or **Copy** to copy an existing view and alter its settings as a new view



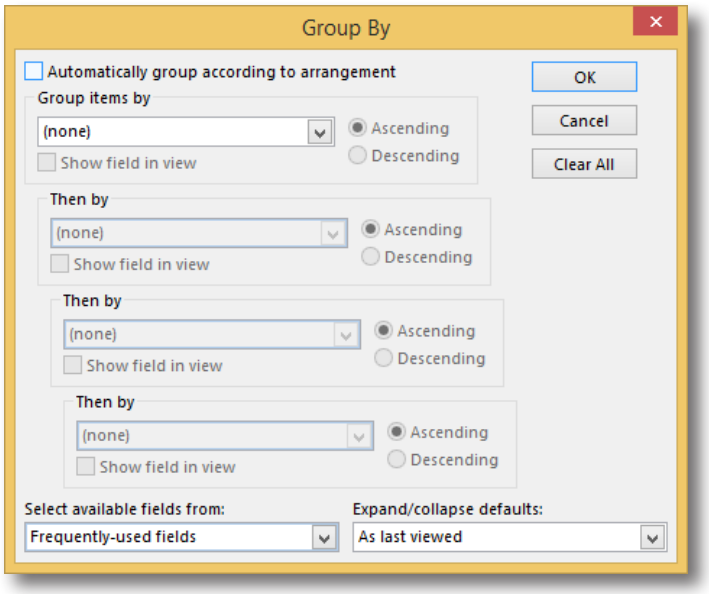
5. Provide a name for the view in the **Name of New View** field on the **Copy View** dialog box and click **OK**
6. In the **Advanced View Settings** dialog box, select the items you wish to customize and modify them, then click **OK** to save the new view

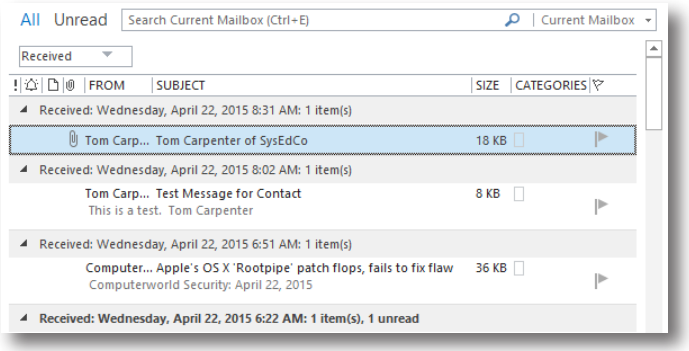


Using Grouped Views

Groups allow you to organize items in a table (a view) into a grouped outline, which you can then expand or collapse to display or hide the items they contain.

1. Select the **Single** view from the **Change View** button on the **View** tab of the ribbon.
2. Click the **View Setting**s button and then click the **Group By** button.
3. Deselect **Automatically group according to arrangement** and click **OK**. Click **OK** again.
4. Right-click on a column heading and select **Group By Box**.
5. Drag columns by which you wish to sort into the area labeled **Drag a column header here to group by that column** to get results similar to the following.

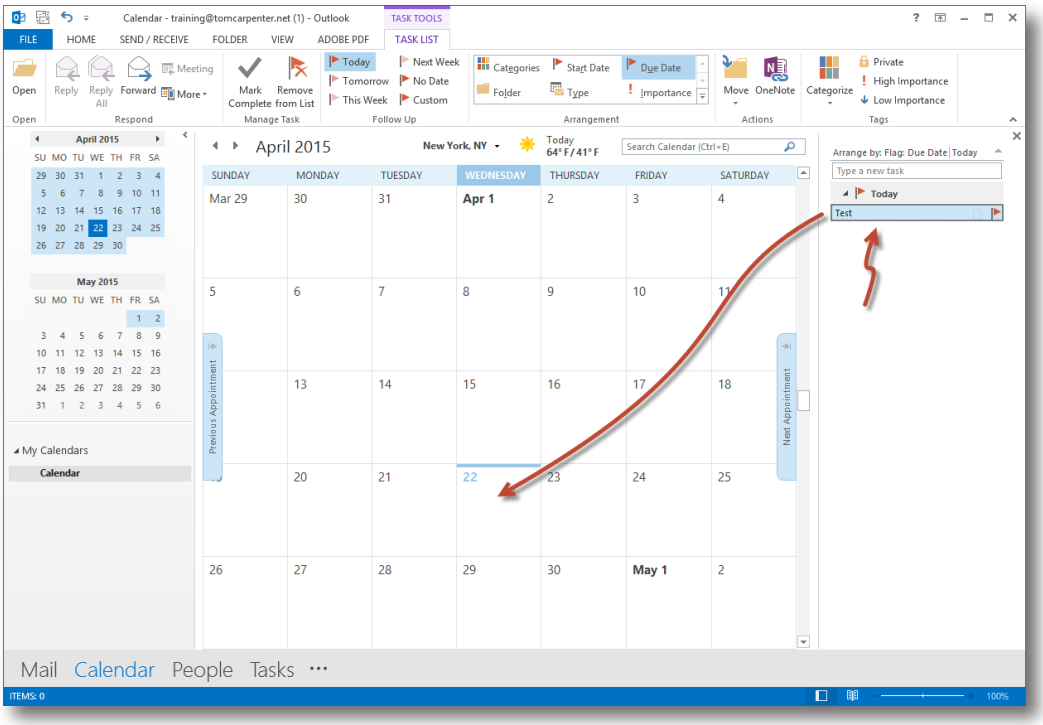




Converting Tasks to Appointments

Sometimes an item in a task list evolves into an appointment, and you can convert such a task.

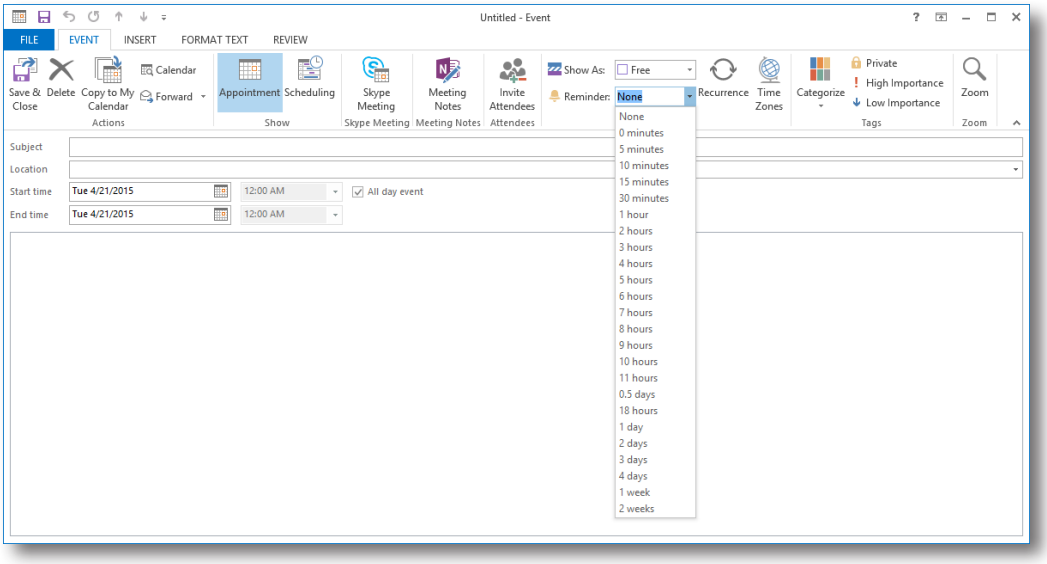
1. Select the **Calendar** view
2. Choose the **View** tab
3. In the **Layout** group, choose **To-Do Bar > Tasks**
4. Drag a desired task to the calendar location where it should be placed as an appointment



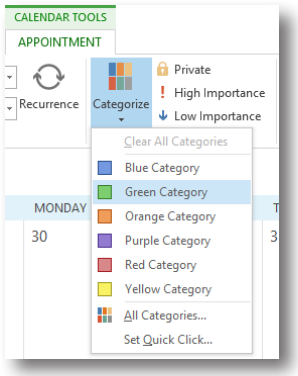
Setting Reminders

Reminders can help make sure that no future appointments are forgotten.

1. If you want Outlook® to give you a reminder that a task or appointment is due, make certain the **Reminder** check box is selected in the settings dialog box for the task or appointment
2. Choose the reminder value, which is a time expressed in length before the scheduled task or appointment at which Outlook should alert you



Color-coding Your Appointments



You can use categories and their associated colors to color-code your appointments in the Day, Work Week or Month view of your calendar.

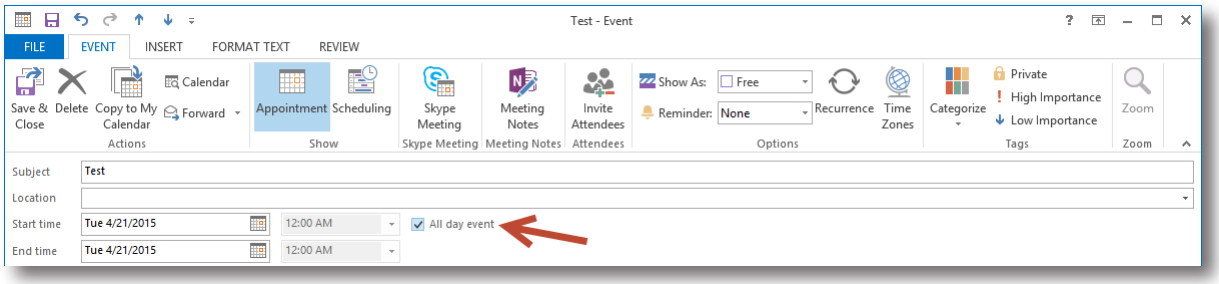
1. Click the Calendar item to be configured
2. On the **Calendar Tool**s tab of the ribbon, select the **Categorize** button
3. Select the desired category, which applies the desired color

NOTE: You can select **All Categories** to edit category names and colors.

Scheduling an Event

Events are all-day activities in Outlook®, whereas appointments typically have a limited duration during the day. Appointments are activities that typically do not involve other people. Meetings are activities that do involve other people. Events may or may not involve other people, but they consume the entire day on the calendar.

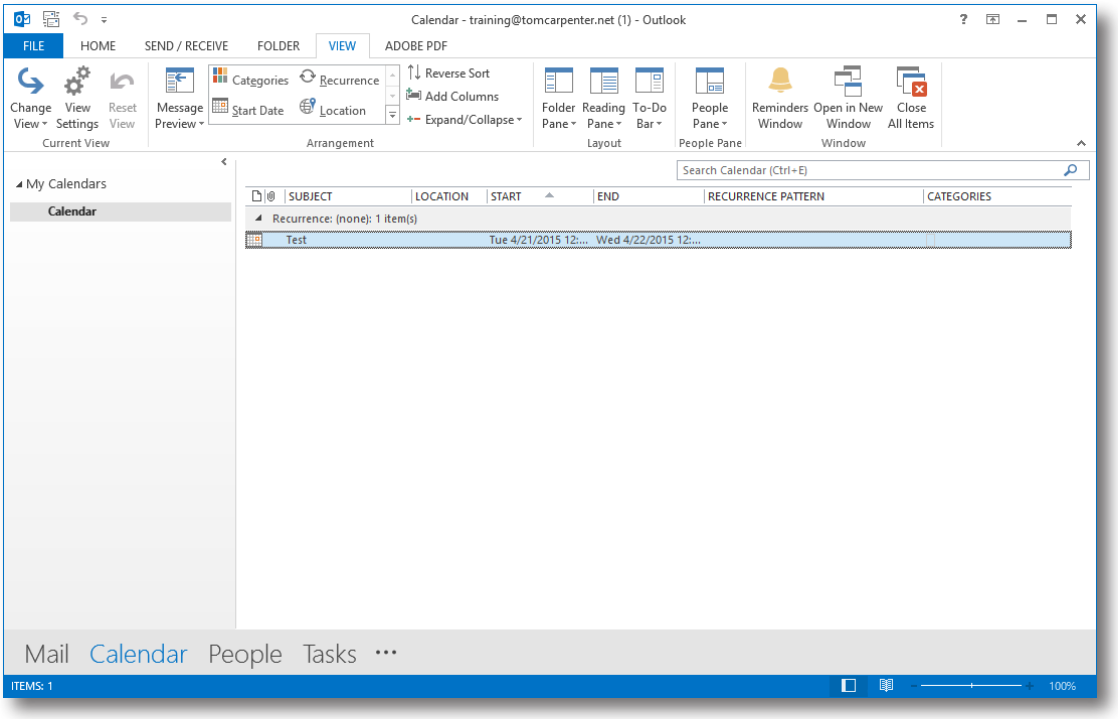
1. In the **Appointment** window, click the **All day event** check box to convert an appointment to an event



Changing Calendar Views

Outlook® provides many ways to view the Calendar. The List view shows the current year's activities on a schedule.

1. Click **Change View** on the **View** tab of the ribbon and select **List**



BONUS MATERIALS:

HANDY DESK REFERENCE TO THE TOP FEATURES OF OUTLOOK®

General Outlook Shortcuts

Description	Shortcut
Send message	Ctrl+Enter or Alt+S
Reformat an email message from RTF to plain text	Ctrl+Shift+O
Delete message from message window	Ctrl+D
New Contact Dialog	Ctrl+Shift+C
New Office Document	Ctrl+Shift+H
Read Warning Header	Ctrl+Insert+W
Save non-email item in current folder	Alt+S
Cancel the current operation	Escape Key
Move up current level of treeview	Up Arrow
Move down current level of treeview	Down Arrow
Collapse current branch of treeview	Left Arrow
Expand current branch of treeview	Right Arrow
Launch Go-To Folder dialog	Ctrl+Y
Save unfinished item in Drafts folder	Ctrl+S
Move selected item to Deleted Items folder	Delete Key
Open Print dialog box	Ctrl+P
Delete current item	Ctrl+D
Mark as unread or read	Ctrl+Q
Select all	Ctrl+A
Copy highlighted items/text to clipboard	Ctrl+C
Cut highlighted items/text to clipboard	Ctrl+X
Paste items/text from clipboard	Ctrl+V
Open application menu (to maximize, minimize, etc.)	Alt+Spacebar
Create new item	Ctrl+N

Description	Shortcut
Undo	Ctrl+Z
Move cursor to top of email list	Home
Move cursor to end of email list	End
Move edit cursor to top in new email message window	Ctrl+Home
Move edit cursor to end in new email message window	Ctrl+End
Check Names	Ctrl+K
Move cursor to Menu bar	Alt+ or F10
Launch Advanced Find	Ctrl+Shift+F or F3
Move to next window pane	F6
Launch Spell Checker	F7
Move directly to Inbox	Ctrl+Shift+I
Move directly to Outbox	Ctrl+Shift+O
Copy selected item(s) to a folder	Ctrl+Shift+Y
Create new folder dialog	Ctrl+Shift+E
Move selected item to folder	Ctrl+Shift+V
Create a new email message	Ctrl+Shift+M
Create a new appointment item	Ctrl+Shift+A
Create a new contact item	Ctrl+Shift+C
Create a new task item	Ctrl+Shift+K
Create a new note item	Ctrl+Shift+N
Message options (from a new message window)	Alt+P
Open Address Book	Ctrl+Shift+B
Launch Flag for Follow-up dialog box	Ctrl+Shift+G
Reply to sender	Ctrl+R
Reply to all	Ctrl+Shift+R
Forward message	Ctrl+F

In Calendar Week View

Description	Shortcut
Go to today's date	Alt+D
Go to a date	Ctrl+G
Move to next date	Down Arrow
Move forward one week	Page Down
Move backward one week	Page Up
Move to appointments on current date	Tab (hit Enter twice to open item)

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