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Bill Dyszel



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by Bill Dyszel



WILEY

John Wiley & Sons, Inc.

Outlook® 2013 For Dummies®

Published by

John Wiley & Sons, Inc.

111 River Street

Hoboken, NJ 07030-5774

www.wiley.com

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Published by John Wiley & Sons, Inc., Hoboken, New Jersey

Published simultaneously in Canada

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Library of Congress Control Number: 2012956417

ISBN: 978-1-118-49046-4 (pbk); ISBN 978-1-118-49048-8 (ebk); ISBN 978-1-118-49148-5 (ebk);

ISBN 978-1-118-49136-2 (ebk)

Manufactured in the United States of America

10 9 8 7 6 5 4 3 2 1



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Dedication

This book is dedicated to everyone with a love for lifelong learning.

Author's Acknowledgments

Thanks so much to the extraordinary team at Wiley that made this edition a reality — to Katie Mohr for her persistent focus on the project's outcome, and to Tonya Cupp and Rebecca Senninger for steady editorial guidance.

Very special thanks to my longtime friend, Navy shipmate, and esteemed colleague Michael Zulich for taking on the lion's share of the work of revising this book. His rock-solid technology experience, superior editorial sensibility and boundless common sense helped make this book readable, accurate, and enjoyable. Through countless obstacles, including hurricanes, floods, snowstorms, and turbulent deadlines, Mike kept the project moving forward smoothly at top-notch quality. And of course, he's a fabulous colleague and a regular *mensch*, as they say in his native Brooklyn, which made the whole process a pleasure. Thanks, Mike!

Publisher's Acknowledgments

We're proud of this book; please send us your comments at <http://dummies.custhelp.com>. For other comments, please contact our Customer Care Department within the U.S. at 877-762-2974, outside the U.S. at 317-572-3993, or fax 317-572-4002.

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Introduction

Microsoft Outlook has become an essential business tool in the years since I covered its first prerelease versions in 1996. If you work in a company that employs more than a dozen people, it's virtually certain that most of your communications and time planning will take place in Microsoft Outlook. Knowing Outlook well can make you more successful at work. Whether you're taking directions from your boss, giving directions to your employees, organizing meetings, collaborating on important projects, or just keeping up with business, Outlook is what you'll use to get it done fast.

Not understanding Outlook is almost like not understanding how to get to work. Because Outlook is so popular, hundreds of millions of people now spend their entire workday using Outlook one way or another. Now that more companies encourage telecommuting and hire employees who work from home, Outlook is the virtual workplace of so many people.

I've had the pleasure of training literally thousands of people on all the different ways Outlook can improve their workflow and simplify their life. People are often surprised to discover how much faster they can work when they know to use Outlook effectively.

Microsoft Outlook was designed to make organizing your daily work blindingly easy — almost automatic. You already have sophisticated programs for word processing and number crunching, but Outlook pulls together everything you need to know about your daily tasks, appointments, e-mail messages, and other details. More important, Outlook enables you to use the same methods to deal with many different kinds of information, so you have to understand only one program to deal with the many kinds of details that fill your life, such as

- ✓ Setting up a conference call with colleagues
- ✓ Sending links to a webinar for a marketing campaign
- ✓ Exchanging information about important projects
- ✓ Reminding people to do the things they promised to do
- ✓ Recording all the work you do so that you can find what you did and when you did it

Outlook is a personal information manager that can act as your assistant in dealing with the flurry of small but important details that stand between you and the work you do. You can just as easily keep track of personal information that isn't business-related and keep both business and personal information in the same convenient location.

About This Book

As you read this book and work with Outlook, you discover how useful Outlook is, as well as find new ways to make it more useful for the things you do most. If you fit in any of the following categories, this book is for you:

- ✔ You just got a job with a company that uses Outlook as its e-mail program and you need to find out how to use it in a hurry.
- ✔ You've used Outlook for years just because "it was there," but you know you've only used a tenth of its power. Now you're overwhelmed with work and want to plow through that mountain of tasks faster by using Outlook better.
- ✔ You're planning to buy (or have just bought) Outlook and want to know what you can do with it — as well as how to do your work more efficiently.
- ✔ You want an easier, faster tool for managing tasks, schedules, e-mail, and other details in your working life.

Even if you don't fall into one of these groups, this book gives you simple, clear explanations of how Outlook can work for you. It's hard to imagine any computer user who wouldn't benefit from understanding Outlook better. If all you want is a quick, guided tour of Outlook, you can skim this book; it covers everything you need to get started. Getting a handle on most major Outlook features is fairly easy — that's how the program is designed. (You can also keep the book handy as a reference for the tricks that you may not need every day.)

Don't be fooled, though — you can find a great deal of power in Outlook if you want to dig deeply enough. Outlook links with your Microsoft Office applications, and it's programmable by anyone who wants to tackle some Visual Basic script writing. (I don't get into that in this book.) You may not want to do the programming yourself, but finding people who can do that for you isn't hard; just ask around.

Foolish Assumptions

I assume that you know how to turn on your computer and how to use a mouse and keyboard. In case you need a brushup on Windows, I throw in reminders as I go along. If Windows and Microsoft Office are strange to you, I recommend picking up (respectively) Andy Rathbone's *Windows 8 For Dummies* or Wally Wang's *Microsoft Office 2013 For Dummies* (both published by Wiley).

If all you have is a copy of this book and a computer running Outlook, you can certainly do basic, useful things right away (like send and receive e-mail), as well as a few fun things. And after some time, you'll be able to do *many* fun and useful things.

How This Book Is Organized

To make it easier to find out how to do what you want to do, this book is divided into parts. Each part covers a different aspect of using Outlook. Because you can use similar methods to do many different jobs with Outlook, the first parts of the book focus on *how* to use Outlook. The later parts concentrate on *what* you can use Outlook to do.

Part I: Getting Started with Outlook 2013

I learn best by doing, so the first chapter is a quick guide to the things that most people do with Outlook on a typical day. You find out how to use Outlook for routine tasks such as handling messages, notes, and appointments. You can get quite a lot of mileage out of Outlook, even if you only check out the things I describe in the first chapter.

Because Outlook allows you to use similar methods to do many things, I go on to show you the things that stay pretty much the same throughout the program: how to create new items from old ones by using drag and drop; ways to view items that make your information easy to understand at a glance; and the features Outlook offers to make it easier to move, copy, and organize your files.

Part II: Taming the E-Mail Beast

E-mail is now the most popular function of computers. Tens of millions of people are hooked up to the Internet or an office network. The problem is that e-mail can still be a little too complicated. As I show you in Part II, however, Outlook makes e-mail easier. Computers are notoriously finicky about the exact spelling of addresses, correctly connecting to the actual mail service, and making sure that the text and formatting of the message fit the software you're using. Outlook keeps track of the details involved in getting your message to its destination.

Outlook also allows you to receive e-mail from a variety of sources and manage the messages in one place. You can slice and dice your list of incoming and outgoing e-mail messages to help you keep track of what you send, to whom you send it, and the day and time you send it.

Part III: Managing Contacts, Dates, Tasks, and More

Outlook takes advantage of its special relationship with your computer and your office applications (Microsoft Outlook with Microsoft Office, Microsoft Internet Explorer, and Microsoft Windows — notice a pattern?) to tie your office tasks together more cleanly than other such programs, and to make it easier to deal with all the stuff you have to do. The chapters in Part III show you how to get the job done with Outlook.

In addition to planning and scheduling, you probably spend lots of time working with other people. You need to coordinate your tasks and schedules with theirs (unless you make your living doing something weird and antisocial, such as digging graves or writing computer books). Outlook allows you to share calendar and task information with other people, and also keep detailed information about the people with whom you collaborate. You can also assign tasks to other people if you don't want to do those tasks yourself. (Now *there's* a time-saver.) Be careful, though; other people can assign those tasks right back to you.

If you have yellow sticky notes covering your monitor, refrigerator, desktop, or bathroom door, Outlook's Notes feature might change your life. Notes are little yellow (or blue or green) squares that look just like those handy paper notes that you stick everywhere as reminders and then lose. About the only thing that you can't do is set your coffee cup on one and mess up what you wrote.

Part IV: Beyond the Basics: Tips and Tricks You Won't Want to Miss

Some parts of Outlook are less famous than others, but no less useful. Part IV guides you through the sections of Outlook that the real power users exploit to stay ahead of the pack.

Outlook has parts that many people never discover. Some of those parts are obscure but powerful — others aren't part of Outlook at all (technically speaking). Maybe you want to know how to do things like create custom forms and set up Outlook to get e-mail from the Internet. If you use Outlook

at home or in your own business, or if you just want to soup up your copy of Outlook for high-performance work, you'll find useful tips in Part IV.

Part V: Outlook at Work

Big organizations have different requirements than small businesses. Many large companies rely heavily on Outlook as a tool for improved teamwork and project management. Part V shows you the parts of Outlook that work best in the big leagues (or for people with big ambitions). You'll get all the info you need to collaborate using SharePoint and Microsoft Exchange, beef up your security, customize the way Outlook looks and works, and check your Outlook account when you're not in the office with Outlook Web Access.

Part VI: The Part of Tens

Why ten? Why not! If you must have a reason, ten is the highest number you can count to without taking off your shoes. A program as broad as Outlook leaves a great deal of flotsam and jetsam that doesn't quite fit into any category, so I sum up the best of that material in groups of ten.

Conventions Used in This Book

Outlook has many unique features, but it also has lots in common with other Windows programs — dialog boxes, pull-down menus, Ribbons, and so on. To be productive with Outlook, you need to understand how these features work and recognize the conventions I use for describing these features throughout this book.

Dialog boxes

You deal with more dialog boxes in Outlook than you do in many other Microsoft Office programs. You can call dialog boxes *forms*. E-mail message forms, appointments, name and address forms, and plenty of other common functions in Outlook use dialog boxes to ask you what you want to do. The following list summarizes the essential parts of a dialog box:

- ✓ **Title bar:** The title bar tells you the name of the dialog box.
- ✓ **Text boxes:** Text boxes are blank spaces into which you type information. When you click a text box, you see a blinking I-beam pointer, which means that you can type text there.

- ✓ **Control buttons:** In the upper-right corner of most dialog boxes, you find three control buttons:
 - The *Close button* looks like an X and makes the dialog box disappear.
 - The *Size button* toggles between *maximizing* the dialog box (making it take up the entire screen) and *resizing* it (making it take up less than the entire screen).
 - The *Minimize button* makes the dialog box seem to go away but really just hides it on the taskbar at the bottom of your screen until you click the taskbar to make the dialog box appear again.
- ✓ **Tabs:** Tabs look like little file-folder tabs. If you click one, you see a new page of the dialog box. Tabs are just like the divider tabs in a ring binder; click one to change sections.

The easiest way to move around a dialog box is to click the part that you want to use. If you're a real whiz on the keyboard, you may prefer to press the Tab key to move around the dialog box; this method is much faster if you're a touch-typist. Otherwise, you're fine just mousing around.

Ribbons and tabs

Outlook features a colorful strip across the top called the Ribbon. It's adorned with festive-looking buttons. Many of those buttons are labeled with the names of the things that happen if you click them with your mouse, such as Save, Follow Up, or Delete. A row of tabs appears just above the Ribbon, each bearing a label such as Home, Send/Receive, or View. Clicking any of those words reveals an entirely different Ribbon full of buttons for a different set of tasks.

This arrangement came about because people frequently call Microsoft and ask the company to add features to Outlook that don't need to be added because they've been there all along. The Ribbon is supposed to make those mysterious, hidden features more obvious. I think a better solution is to get more people to read this book. As a public service, I'm doing what I can to make that happen. I hope you'll join the cause.

Keyboard shortcuts

Normally, you can choose any Windows command in at least two different ways (and sometimes more):

- ✔ Click a button in the Ribbon or Navigation pane.
- ✔ Press a keyboard combination. An example is Ctrl+B, which means holding down the Ctrl key and pressing the letter B. (You use this command to make text bold.)
- ✔ Press the F10 key to reveal a shortcut key, and then press that key (way too much trouble, but possible for those who love a challenge).

One rather confusing Outlook feature is the way many commands are hidden within the tabs of the Ribbon. If you don't know which tab has the button you need, you have to click every tab until you find the command you want. That's fine if you're a speed-reader, but hunting for rarely used commands slows down most of us. Fortunately, after you've done a task once, you can usually find your way back to do it again.

Icons Used in This Book

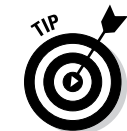
Sometimes the fastest way to go through a book is to look at the pictures — in this case, icons that draw your attention to specific types of useful information. I use these icons in this book:



The Warning icon points to something that can prevent problems.



The Remember icon points out helpful information. (Everything in this book is helpful, but this stuff is even *more* helpful.)



The Tip icon points out a hint or trick for saving time and effort, or something that makes Outlook easier to understand.



The Technical Stuff icon marks background information that you can skip, although it may make good conversation at a really dull party.



Part I

Getting Started with Outlook 2013



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In this part . . .

- ✓ Working smarter with the tools that Outlook offers, including e-mail and calendar features.
- ✓ Getting started quickly on the Outlook features that most people use most of the time.
- ✓ Sending documents to other people by e-mail.
- ✓ Managing your calendar.
- ✓ Tracking the tasks you need to finish.

Chapter 1

The Outlook Features You Really Need to Know

In This Chapter

- ▶ Reading and creating e-mail
 - ▶ Sending files by e-mail
 - ▶ Checking your calendar
 - ▶ Entering appointments and contacts
 - ▶ Managing tasks
 - ▶ Keeping notes
-

I'm kicking off this book with Outlook's Greatest Hits — the things you'll want to do with Outlook every single day. The list sounds simple enough: sending e-mail, making appointments, and so on. But most people only use about 5 percent of Outlook's power. Even if you move up to using 10 percent of Outlook's features, you'll be amazed at how this little program can streamline your life and spiff up your communications. People get pretty excited about Outlook — even if they take advantage of only a tiny fraction of what the package can do. But there's more here than meets the eye; Outlook does ordinary things extraordinarily well. I know you want to do the same, so read on.

Explaining Why So Many People Use Outlook

Millions of people use Outlook because millions of people use Outlook. That's not redundant — Outlook is the standard tool for communicating, collaborating, and organizing for hundreds of millions of people around the world. When so many people use the same tool for organizing the things they do individually, it becomes vastly easier for everyone to organize the things they do together by using that tool. That's the case with Outlook. It's a powerful tool even if you work all alone, but that power gets magnified when you use it to collaborate with others.

What's new in Microsoft Outlook 2013

Outlook gets an upgrade every few years, along with the rest of Microsoft Office, to stay up to date with the way your work habits change. This version of Outlook retains the powerful set of tools the product always had, but changes the way the screens and icons look, for easier understanding. They've also changed the way

you buy the program, so that more people can take advantage of the power of Outlook.

But the main benefit of using Outlook remains the same — it offers a single tool that unifies your communications with all your daily activities and helps you get more done with less effort.

Doing Anything in Outlook the Easy Way

Well, okay, maybe you can't use Outlook to decipher hieroglyphics — but if you know a little about basic techniques, you can do a lot in Outlook — click an icon to do something, view something, or complete something.



Using Outlook is so easy, I can sum it up in just a few simple sentences to cover the most common tasks:

- ✓ **Open an item and read it:** Double-click the item.
- ✓ **Create a new item:** Click an icon in the Folder pane, click a New button in the Ribbon at the top of the screen, and fill out the form that appears. When you're done, click the Send button — or alternatively, click the Save and Close buttons.
- ✓ **Delete an item:** Click the item once to select it, and then click the Delete icon in the Ribbon at the top of the screen. The Delete icon has a black X.
- ✓ **Move an item:** Use your mouse to drag the item to where you want it.

Does that seem too simple? No problem. If you have an itch to complicate things, you *could* try to use Outlook while hopping on a pogo stick or flying a jet plane. But why? These four tricks can take you a long way.

Outlook can also do some sophisticated tricks, such as automatically sorting your e-mail or creating form letters, but you'll need to understand a few details to take advantage of those tricks. The other 300 pages of this book cover the finer points of Outlook. If you only wanted the basics, I could've sent you a postcard.



The figures you see in this book and the instructions you read assume that you're using Outlook 2013 the way it comes out of the box from Microsoft — with all the standard options installed. If you don't like the way the program looks (or how things are named) when you install Outlook, you can change many of the things you see. If you change too much, however, some instructions and examples I give you won't make sense, because then the parts of the program that I talk about may have names you gave them, rather than the ones Microsoft originally assigned. The Microsoft people went to great lengths to make Outlook's features easy to find. I suggest leaving the general arrangement alone until you're comfortable using Outlook.

E-Mail: Basic Delivery

E-mail is Outlook's most popular feature. I've run across people who didn't know Outlook could do anything but exchange e-mail messages. It's a good thing that Outlook makes it so easy to read your e-mail, although it's too bad that so many people stop there.

Reading e-mail

When you start Outlook, you normally see a screen with three columns. The leftmost column is the Folder pane, which lets you switch between different modules in Outlook to perform different tasks. The second column from the left is your list of messages; the right column (called the Reading pane) contains the text of one of those messages. If the message is short enough, you may see its entire text in the Reading pane, as shown in Figure 1-1. If the message is longer, you'll have to open it to see the whole thing.

Here's how to see the entire message:

1. Click the Mail button in the Navigation bar.

You don't need this step if you can already see the messages.

2. Double-click the title of the message.

Now you can see the entire message.

3. Press Esc to close the message.

The message form closes.



A quick way to skim the messages in your Inbox is to click a message and then press the up-arrow or down-arrow key. You can move through your message list as you read the text of your messages in the Reading pane.