OUTLOOK 2013

Working with Email

In today's personal and professional world, email has become the standard, acceptable, and easy way to communicate across your office and across the world. You can send and receive messages, documents, pictures, music, and videos. In this lesson, you will be introduced to the types of email; how to set email options; how to send, read, reply to, and forward messages; and how to keep your email organized. Finally, you will search for messages without opening each folder.

LESSON OBJECTIVES

After studying this lesson, you will be able to:
- Set email options
- Send messages
- Handle incoming messages
- Organize messages

LESSON TIMING

- Concepts/Develop Your Skills: 3 hrs 00 min
- Concepts Review: 15 min
- Total: 3 hrs 15 min

CASE STUDY: GETTING A HANDLE ON EMAIL BASICS

Now that Ann Hitchcock is familiar with the Outlook 2013 window and how to find help when she needs it, she is ready to learn to use the basic email functions in the program. She isn't too worried, as she has been using a webmail account for some time now, and she hears that there are a lot of similarities. In Ann's new job, she will be corresponding with her staff as well as staff at assisted-living homes, dog shelters, vendors, and others. Her predecessor has kept folders in a physical file cabinet for each person or organization with whom she corresponded. Ann will learn how to maintain that same organization with her electronic documents and save time when searching for a message.

Getting Started with Outlook Email

Of all the Outlook elements, email is the most widely utilized. It has become the standard means of communicating in the business world—and it has grown in popularity in our personal lives as well. Email is nearly as simple to use as the telephone and is a convenient way to communicate, especially when you're busy. For example, when you use the telephone, you pick up the receiver and dial a number, and then, before you actually get down to the business at hand, you usually feel the need to exchange some pleasantries. All of this takes time. However, when you send an email, you address it, type a subject, type your message, and send it on its way (still being pleasant of course, just in less time).

Email Options

Many email options are available in Outlook. This lesson covers a couple of the most popular ones, namely adding a signature to your messages and changing the font used for new email messages.

Types of Email Accounts

You can get email accounts from various sources: your company, an Internet service provider (ISP), or maybe more familiar to you, a webmail account such as Yahoo!® Mail, Gmail™, or Outlook.com (formerly called Hotmail). An important fact to understand is that Outlook does not create or supply you with an email account; it merely provides you with access to your accounts, and a more user-friendly way to manage them.
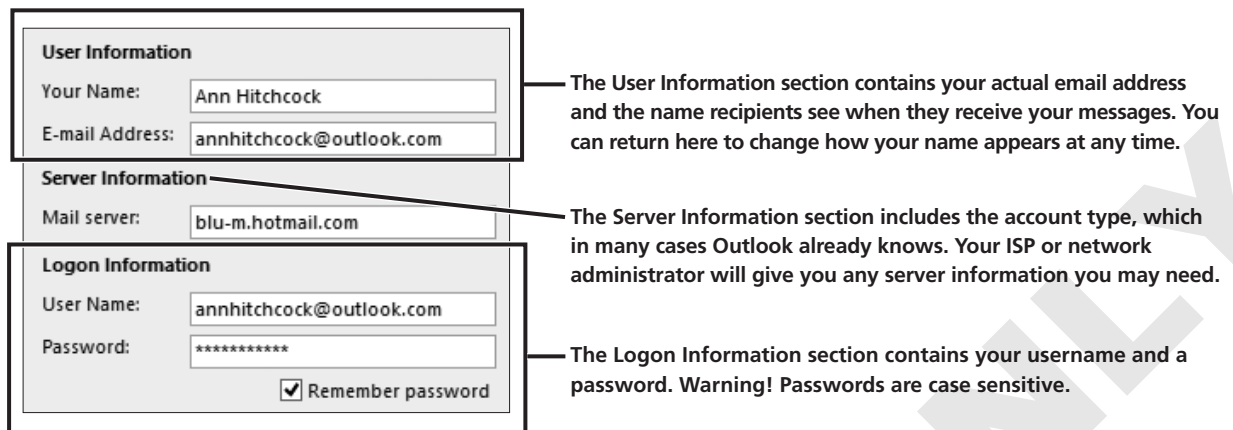
Adding Your Email Account

Any of the email accounts just described can be set up and accessed in Outlook. You will need to know some basic information in order to get any of them set up, such as what type of account it is, the email address, and the password.

NEW! 2013 ▶ In the past, a separate add-on was required to access Hotmail accounts in Outlook, but with the 2013 version, that is no longer the case. And, Hotmail.com is transitioning to (or has transitioned to) Outlook.com, which also does not require an add-on.

Email Account Settings

Settings required for your email account to work include user information, server information, and login information. Whatever you enter in the Your Name field of the User Information section is the name your recipients will see when you send them email. The email address contains a username and domain name, separated by the at (@) sign. As an example, in the email address jsmith@anycorp.com, *jsmith* is the username, and *anycorp.com* is the domain name. Companies typically decide on the username format and other configurations for the email accounts, and then a network administrator sets up Outlook and your email account. In a new shift, some companies and organizations are opting to go with email solutions such as Outlook.com and Gmail rather than maintain their own servers and staffing.

The User Information section contains your actual email address and the name recipients see when they receive your messages. You can return here to change how your name appears at any time.

The Server Information section includes the account type, which in many cases Outlook already knows. Your ISP or network administrator will give you any server information you may need.

The Logon Information section contains your username and a password. Warning! Passwords are case sensitive.

Backstage View

You can find the commands to change email settings in Backstage view. This view is displayed when you click the File tab.
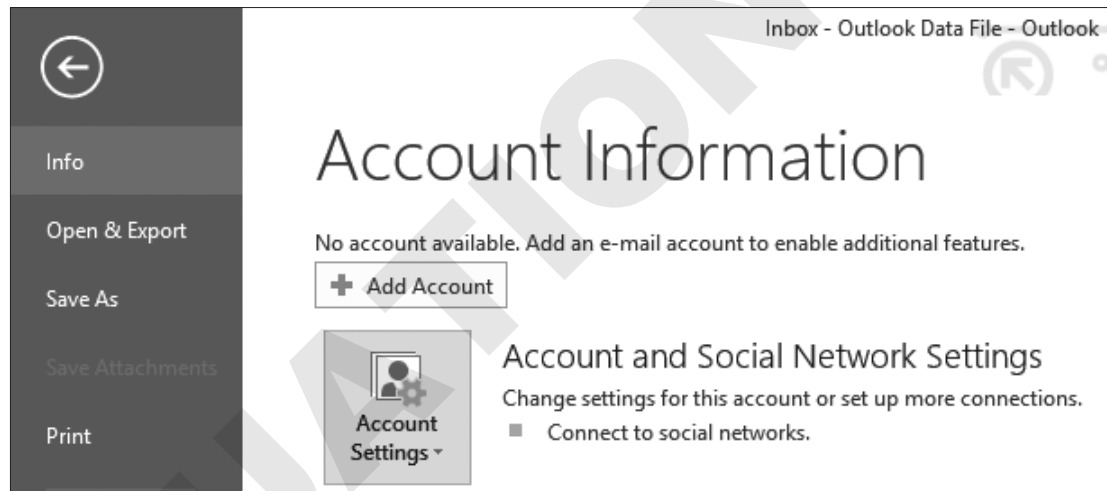
When you click the File tab and enter Backstage view, you will be prompted to add an email account if you do not already have one set up.

Working with Web-Based Simulations

Many of the exercises in this book are available as web-based simulations (WebSims) that require you to have an Internet connection. You can perform these exercises as WebSims or "live" using your own Outlook account.
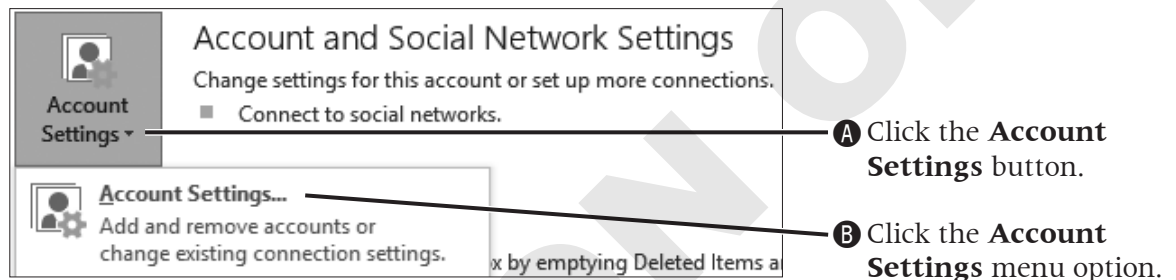
Whenever you see the WebSim icon, you will be working as if you were actually using Microsoft Outlook; however, you will be performing the exercise on a web page. Please note that because Outlook uses your computer's system date, the dates in the figures in the book will not match the WebSims or your date.
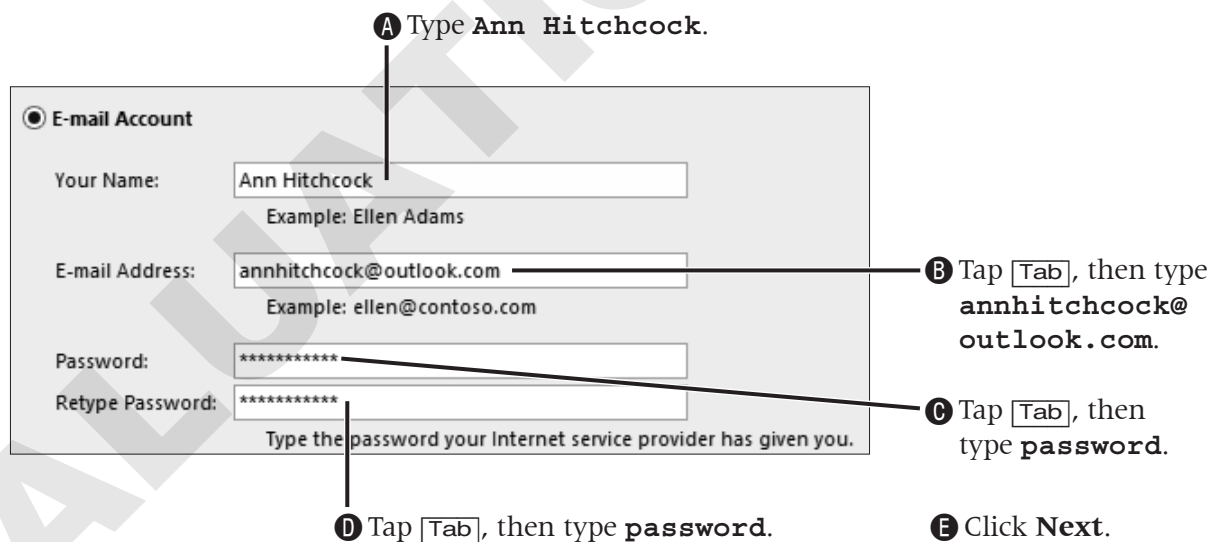
DEVELOP YOUR SKILLS FC-OUT02-D01
Set Up and Manage Account Settings

WebSim FC-OUT13-W0201

1. Follow the step for your situation:
   - **If using the WebSim:** From the left navigation bar, click **Lesson 2**; then click **FC-OUT13-W0201 Set Up and Manage Account Settings**.
   - **If using Outlook "live":** Skip to **step 2**.

2. Click the FILE tab to enter Backstage view.

3. Follow these steps to open the Account Settings dialog box:

Account and Social Network Settings
Change settings for this account or set up more connections.
- Connect to social networks.

Account Settings

Account Settings...
Add and remove accounts or change existing connection settings.

🅐 Click the **Account Settings** button.

🅑 Click the **Account Settings** menu option.

4. Click the New... button, and then follow these steps to enter the account information:

🅐 Type **Ann Hitchcock**.

E-mail Account

Your Name: Ann Hitchcock
Example: Ellen Adams

E-mail Address: annhitchcock@outlook.com
Example: ellen@contoso.com

Password: ***********
Retype Password: ***********
Type the password your Internet service provider has given you.

🅑 Tap ⬚Tab⬚, then type **annhitchcock@ outlook.com**.

🅒 Tap ⬚Tab⬚, then type **password**.

🅓 Tap ⬚Tab⬚, then type **password**.

🅔 Click **Next**.

5. Click **Finish** and then click **Close**.

Sending Messages

Most people who use Outlook are using it to send and receive email. As with other email programs, you enter addresses, type a subject in the header box, type the message, and then send it on its way. You can fill in the header boxes at the top by either clicking in them or tapping the ⌐Tab⌐ key to move through them. After an address has been entered once, Outlook remembers it. So the next time you begin typing the first few letters of it in an address box, a list of addresses beginning with those letters appears.

There are a few rules and email etiquette (also called *netiquette*) issues to point out. Some of the do's and don'ts include the following:

- Don't use spaces in an email address; it just won't work. All email addresses must follow the same format: username@domainname.com.
- Do summarize your message in the subject. This makes it easy for your recipients to keep their messages organized. Never send an email without a subject!
- Don't type in all capital letters, as tempting as it may be. This is interpreted as YELLING. It also makes the text more difficult to read.
- Don't write anything in a message that you wouldn't be comfortable having reported on the six o'clock news.
- Do use correct capitalization and punctuation. You're not texting!
- Do type a semicolon between multiple recipients in the address boxes.

Sending to Multiple Recipients

A message can be sent to one or many recipients. When a message is sent to multiple recipients by entering addresses in the To box, everyone who receives the message will see the addresses of all other recipients. Thus, if you don't want everyone knowing to whom the message was sent, enter the addresses in the Blind Carbon Copy (Bcc) box instead. If the Bcc box is not displayed in a new message window, you can add it by using the Ribbon. You will learn more about the email Ribbon options later in this lesson. Remember to *always* use a subject line in order to enable you and those with whom you correspond to easily determine the topic of the email and to aid in searching for it in the future.

The Bcc Field

When all recipients are in the Bcc box, each one sees only their own address. If some names are in the To and Carbon Copy (Cc) boxes, the Bcc recipients can see those addresses also, but the people in the To and Cc boxes cannot see the Bcc recipients. If you are sending a message to a large number of recipients, you may wish to include all of the email addresses in the Bcc field. This is especially helpful to those who will be viewing the message on a portable device, so that they do not have to scroll through all of the addressees.

The Cc Field

A general rule for placing an address in the Cc box as opposed to the To box is that the people in the Cc box are receiving the message only for informational purposes. That is, they have no action to take and typically are not expected to reply. Many people include their own email

address in either the Cc or Bcc field in order to have a copy of the message sent to themselves. Multiple email addresses in any of the address boxes are separated with semicolons.

From field: If you have multiple email addresses set up in Outlook, you choose the one from which to send here.

Cc field: In this case, the message is only informational for Samuel.

Subject line: This should be succinct yet descriptive so the recipient knows what it is about in a glance.

To field: In this case, Stephen will see everyone else's address except those placed in the Bcc field.

Bcc field: In this case, nobody else can see that Ann is receiving a copy of this email herself.

From ▾	annhitchcock@outlook.com
To...	Stephen Sinatra
Cc...	Samuel Vashon
Bcc...	annhitchcock@outlook.com
Subject	Planning Meeting for Silver Creek Oaks

Hi Stephen,

Will you please send out a reminder for our planning meeting regarding the Silver Creek Oaks grant?

Thanks!
Ann

Message field: You type the text of the message to all recipients here.

The Previously Learned Email List

Once you have sent a message to a recipient, Outlook "learns" the email address in order to make it easier for you to use again. To use these previously learned email addresses, or contacts that you already have entered into Outlook, you can easily select them from the previously learned email list that appears when you start typing an email address.

To...	st
Cc...	stephen.sinatra@yahoo.com ✕
Bcc...	annhitchcock@outlook.com;
Subject	Planning Meeting for Silver Creek Oaks

When the previously learned email list appears, you can either click an entry you wish to select, or tap Tab when it is highlighted.
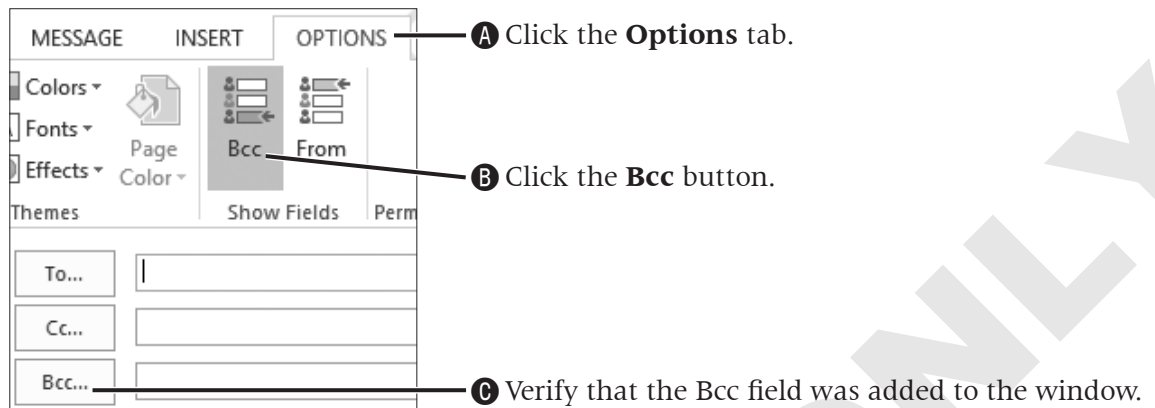
DEVELOP YOUR SKILLS FC-OUT02-D02
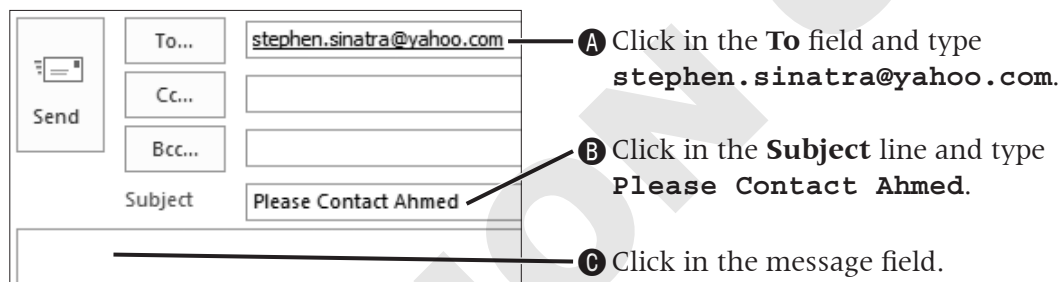
Create New Messages

WebSim   FC-OUT13-W0202

1. Follow the step for your situation:
   - **If using the WebSim:** From the left navigation bar, click **Lesson 2**; then click **FC-OUT13-W0202 Create New Messages**.
   - **If using Outlook "live":** Skip to **step 2**.
2. Choose **Home→New→New Email**.

3. Follow these steps to add a Bcc field to the message window:

Ⓐ Click the **Options** tab.

Ⓑ Click the **Bcc** button.

Ⓒ Verify that the Bcc field was added to the window.

4. Follow these steps to create a message:

Ⓐ Click in the **To** field and type **stephen.sinatra@yahoo.com**.

Ⓑ Click in the **Subject** line and type **Please Contact Ahmed**.

Ⓒ Click in the message field.

5. Type the following text in the message field, tapping ⌷Enter⌷ only where indicated:

Hi Stephen, ⌷Enter⌷

⌷Enter⌷

Will you please call Ahmed from Eugene Field Care Facility to arrange a training for his staff? ⌷Enter⌷

⌷Enter⌷

Sincerely,

Ann

6. Click ▤.

7. Choose **Home→New→New Email** ▤.

8. Follow these steps to complete the header section of the message:

Ⓐ Begin typing **stephen**.

Ⓑ When you see the previously learned email list appear, click Stephen's email address.

Ⓒ Tap ⌷Tab⌷, and type **samuel.vashon@gmail.com** in the Cc field.

Ⓓ Tap ⌷Tab⌷, and type **annhitchcock@outlook.com** in the Bcc field.

Ⓔ Tap ⌷Tab⌷, and type **Planning Meeting for Silver Creek Oaks** as the subject.
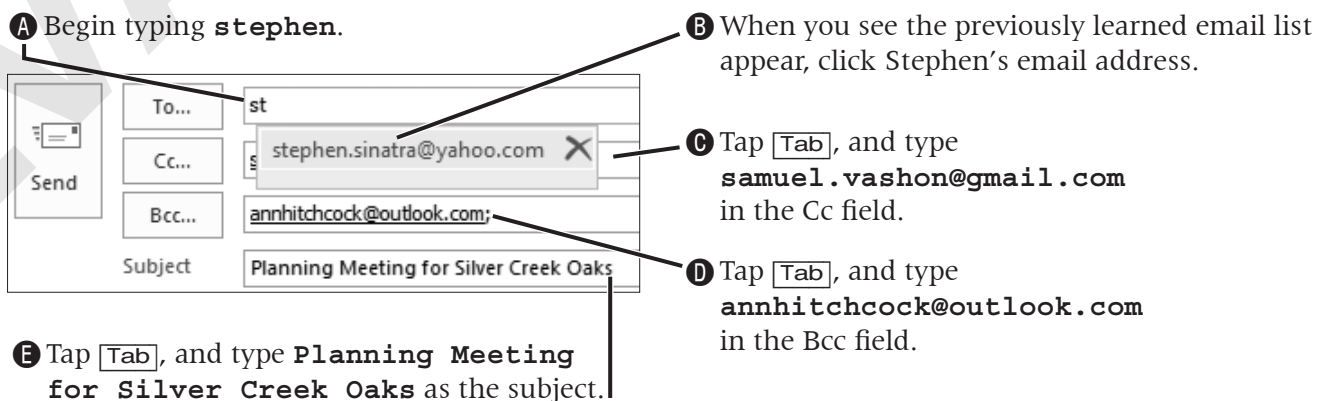
9. Click in the message field and type the following text:

`Hi Stephen,` Enter

Enter

`Will you please send out a reminder for our planning meeting regarding the Silver Creek Oaks partnership?` Enter

Enter

`Thanks!`

`Ann`

10. Click the **Send** button.

11. Click the **Back to Course** link.

Using Signatures to Save Time

A signature is the text you enter at the end of a message (your name, title, company, and so forth). You can create one or more signatures that Outlook will store and keep ready for you to insert at any time. You can also designate a default signature(s) to be inserted automatically into each message you respond to or create.

When creating a new message, the Ribbon displays contextual tabs across the top. The Insert contextual tab contains buttons related to inserting something. For example, you can insert a file (which you will learn about at the end of this lesson), a picture, SmartArt, a hyperlink, or a signature. Outlook stores all of the signatures you create and lets you pick and choose which to insert in any message. The Signatures command is found in the Include group on both the Message and Insert contextual tabs.

Message contextual tab on the Ribbon

**List of saved signatures**
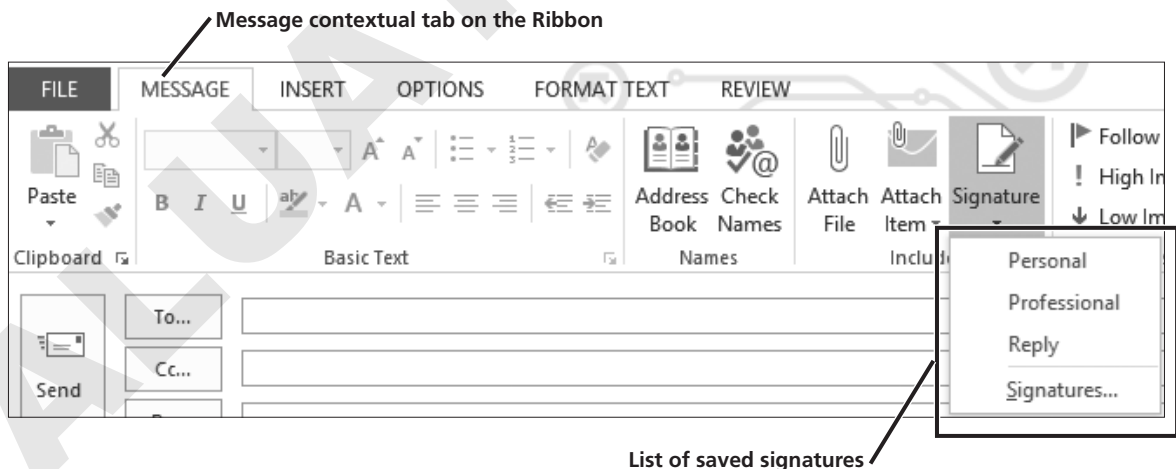
DEVELOP YOUR SKILLS FC-OUT02-D03

Set Up Multiple Signatures and Set Defaults

1. Choose **Home→New→New Email** ⬛.

2. Choose **Message→Include→Signature** 📝 **menu ▼ →Signatures**.

3. Click the **New** button in the Signatures and Stationery dialog box.

4. Follow these steps to create a new signature:

Ⓐ Type **Professional** as the signature name and click **OK**.
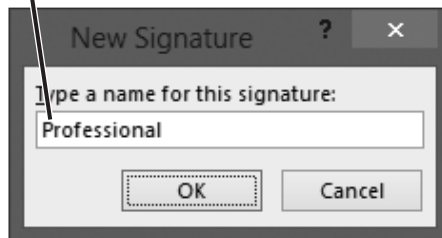
Ⓑ Click in the **Edit Signature** text box and type the text shown, tapping Enter after each line.
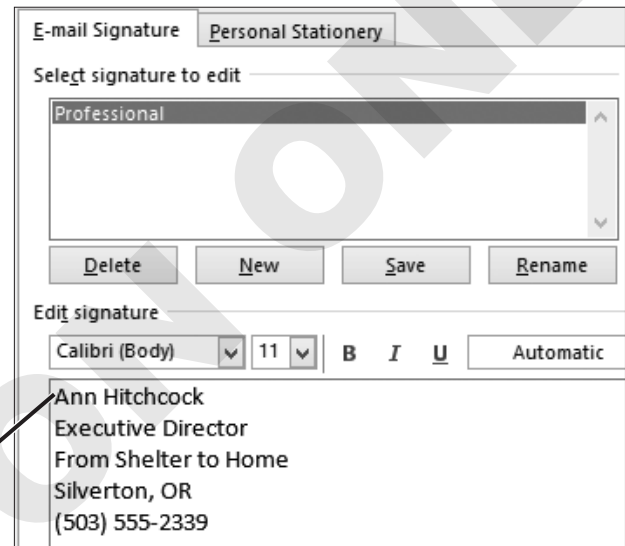
5. Click **Save**, and then click **New** to create another signature.

6. Type **Personal** as the signature name and click **OK**.

7. Click in the **Edit Signature** text box and type the signature for Ann as shown:

8. Click **Save**, and then click **New** to create a final signature.

9. Type **Reply** as the signature name, click **OK**, and then type **Ann** as the signature text.

10. Follow these steps to set default signatures:
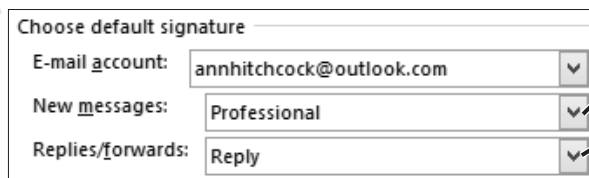
Ⓐ Click the drop-down arrow and choose **Professional**.

Ⓑ Click the drop-down arrow and choose **Reply**.

Ⓒ Click **OK**.

11. Close the **Untitled – Message** window.

Changing and Inserting Signatures

Now that you have learned how to create a signature and how to set one up to be inserted automatically, you need to know how to insert one manually or how to change the one that was automatically inserted by default. Some people create multiple signatures but never set one up as a default, which is a good idea in some instances. For example, if you create a fun personal signature as a default (in our example, *Executive Mommy*) but forget about it and send a letter to the president of the company, you would probably be very embarrassed when you realized what you did. Thus, sometimes it's better to forego having a signature inserted automatically and simply do it yourself.

DEVELOP YOUR SKILLS FC-OUT02-D04

Use the Ribbon to Change a Signature

WebSim   FC-OUT13-W0204

1. Follow the step for your situation:

- **If using the WebSim:** From the left navigation bar, click **Lesson 2**; then click **FC-OUT13-W0204 Use the Ribbon to Change a Signature**.

- **If using Outlook "live":** Skip to **step 2**.

2. Choose **Home→New→New Email** .

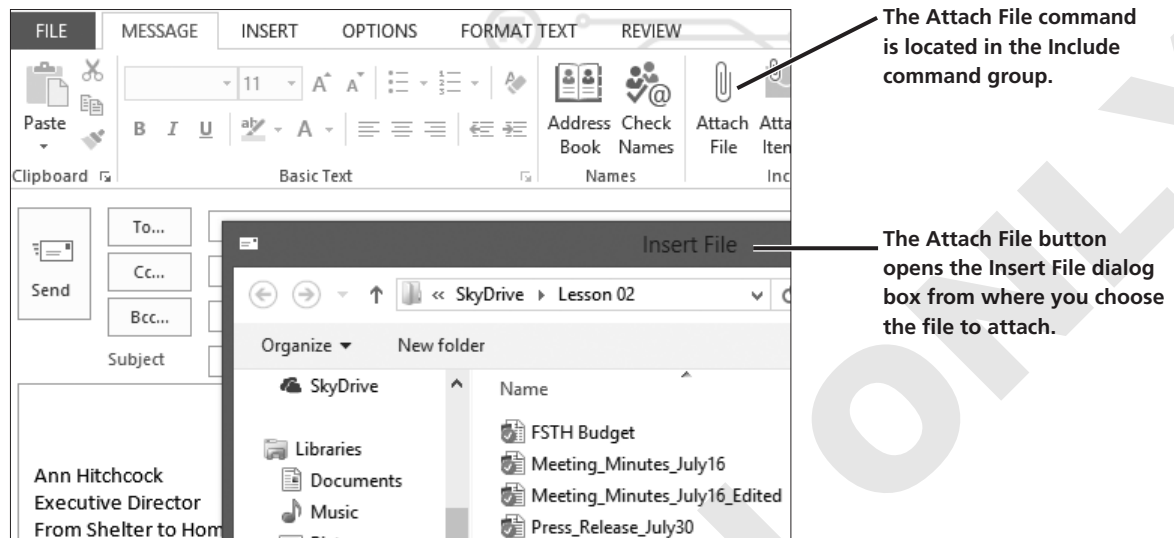**3.** Follow these steps to complete the header section of the message:

To...	lovemykids@inbox.com
Cc...	
Bcc...	
Subject	Carpool

Ⓐ Type **lovemykids@inbox.com**.

Ⓑ Tap ⌨Tab three times, and type **Carpool** as the subject.

4. Click in the message field and type this text:

Hi Lucy, Enter

Enter

Could you please drive the kids' carpool for me tomorrow?

5. Choose **Message→Include→** 📝 **menu ▼ →Personal**.

6. Click **Send** .

Attaching Files

Outlook allows you to attach other files to your messages, including a Word or Excel file, a picture, other Outlook items, and so forth. When the recipients receive the message, they can view the attachment in the Reading pane or in the associated program, and also choose whether to save it on their computer. You will learn how to save attachments later in this lesson.

Both the Message tab and the Insert tab contain the Attach File command in the Include group on the Ribbon.

The Attach File command is located in the Include command group.

The Attach File button opens the Insert File dialog box from where you choose the file to attach.

After you attach a file, a new box appears under the Subject box and displays the attached filename.
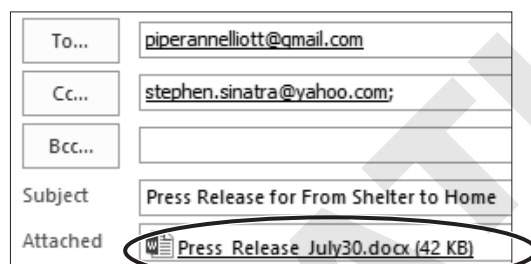
If you have included the keyword *attach* (or *attached*, *attachment*, etc.) in the email message but forget to attach the file before you choose to send, don't worry. Outlook 2013 will provide a reminder for you.
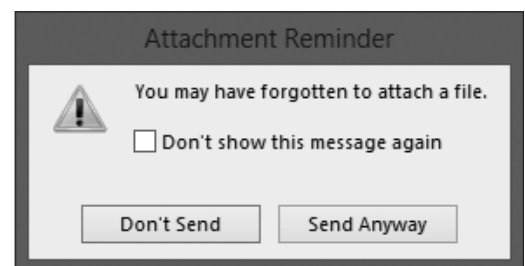
DEVELOP YOUR SKILLS FC-OUT02-D05

Attach Files to Messages

WebSim   FC-OUT13-W0205

1. Follow the step for your situation:
   - **If using the WebSim:** From the left navigation bar, click **Lesson 2**; then click **FC-OUT13-W0205 Attach Files to Messages**.
   - **If using Outlook "live":** Skip to **step 2**.

2. Choose **Home→New→New Email** 📧.

3. Address the message to **piperannelliott@gmail.com** and Cc Stephen Sinatra.

4. Type **Press Release for From Shelter to Home** as the subject.

5. Click in the message field and type the message shown in the following illustration. Note that the Professional signature was added automatically.
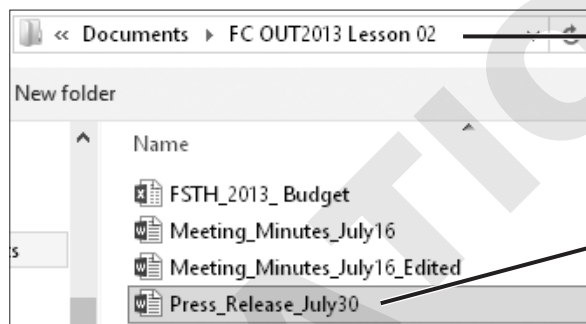
> Hi Piper,
>
> Please find a press release attached that describes a grant that has been awarded by our organization.
>
> Sincerely,
>
> Ann Hitchcock
> Executive Director
> From Shelter to Home
> Silverton, OR
> (503) 555-2339

6. Choose **Message→Include→Attach File** 📎.

7. Follow these steps to attach a file:

Ⓐ Navigate to your **FC OUT2013 Lesson 02** folder.

Ⓑ Double-click the **Press_ Release_July30** file.

8. Send the message.

9. Click the **New Email** button.

10. Address the message to Sadie James and Frasier Heron. (Hint: Type the first few letters of each and choose their names from the list that appears.) If you are not using the WebSim, replace Sadie James and Frasier Heron with two of your classmates' email addresses.

11. Type **Review of Annual Budget** as the subject.

12. Type this message:

    Please review the attached budget prior to our next budget meeting.

13. Choose **Message→Include→Attach File** 📎.

14. Navigate to your **FC OUT2013 Lesson 02** folder.

15. Double-click **FSTH_2013_Budget** in the Insert File window.

16. Send the message.

17. Create and send one additional message, using the following illustration as a reference. If you are not using the WebSim, replace Sadie James and Frasier Heron in the To field with your email address and a classmate's email address.

Using Spell Check

Outlook has a spelling and grammar checker you can use to check for spelling errors in the body of a message, in an appointment, or in the Notes section of a contact. You must still proofread your messages, because the spell checker will mark a word as a possible error only if it is not in the Outlook dictionary. For example, you would probably be embarrassed if a message went out about the results of the *Broad Meeting* instead of the *Board Meeting*. You can see why proofreading is so important!
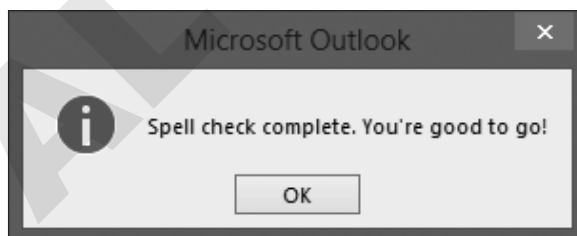
Don't believe everything you read. Once the spell check is complete, you must still proofread your message for words that may be spelled correctly, but used incorrectly.

Methods to Correct Spelling Errors

A possible spelling error is indicated with a red wavy line under the word. You can fix the problems as you type, or you can wait until you have completed the message and check for errors all at once by opening the Spelling dialog box.

Hi Stephen,

Will you please crop in to see me before you leave for Sivler Creek Oacs? I would like to review the contract one fnial time prior to you obtaining the sgnature from Chande . This is such an important manner that I want us to get it right the first time.
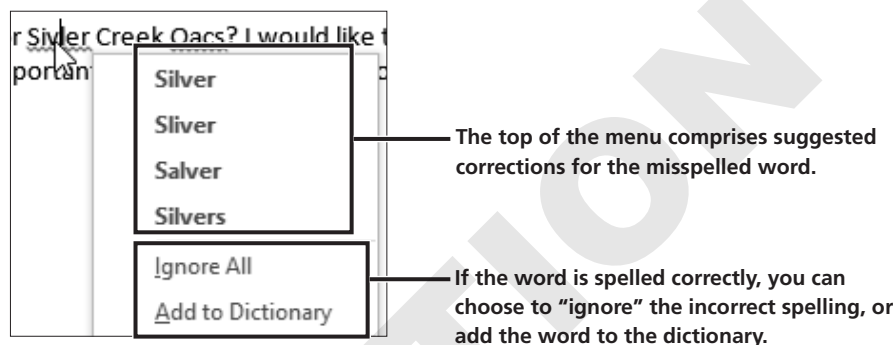
Shrank you,

Notice the wavy lines indicating spelling errors. Can you find the three errors that Spell Check missed?

You can also correct a mistake by clicking the right mouse button and choosing the correct word from the options menu, or you can simply select the word and retype it.

r Sivler Creek Oacs? I would like 1
portan

| Silver |
| Sliver |
| Salver |
| Silvers |

| Ignore All |
| Add to Dictionary |

The top of the menu comprises suggested corrections for the misspelled word.

If the word is spelled correctly, you can choose to "ignore" the incorrect spelling, or add the word to the dictionary.

Notice the options that appear when you right-click Sivler.

The upper section of the Spelling dialog box displays the entire sentence containing the error, which is highlighted in red. The lower section displays a list of possible corrections.

The Not in Dictionary box displays the sentence and highlights the possible error. You can edit the error directly if the correct suggestion is not displayed.

The Suggestions box displays possible corrections for the error.

Spelling and Grammar: English (United States)   ?   ×

Not in Dictionary:

Will you please crop in to see me before you leave for Sivler Creek Oacs?

Ignore Once
Ignore All
Add to Dictionary

Suggestions:

Silver
Sliver
Salver
Silvers

Change
Change All
AutoCorrect

☐ Check grammar

Options...   Undo   Cancel

You can choose to ignore once or always, or to add the word to the dictionary.

Once you select a suggestion, you may choose whether to change it in just this one instance or every time it appears in the message.

DEVELOP YOUR SKILLS FC-OUT02-D06
Check the Spelling in a Message

WebSim   FC-OUT13-W0206

1. Follow the step for your situation:
   - **If using the WebSim:** From the left navigation bar, click **Lesson 2**; then click **FC-OUT13-W0206 Check the Spelling in a Message**.
   - **If using Outlook "live":** Skip to **step 2**.

2. Choose **Home→New→New Email** ⬚.

3. Address the message to Stephen Sinatra.

4. Type **Contract Review** as the subject.

5. Type the following message exactly as shown, including the typos; tap Enter as needed. Use the Professional signature that is automatically inserted.

   Hi Stephen,

   Will you please crop in to see me before you leave for Sivler Creek Oacs? I would like to review the contract one fnial time prior to you obtaining the sgnature from Chande. This is such an important manner that I want us to get it right the first time.

   Shrank you,

6. Follow these steps to correct the first error:

   A Point to the misspelled word, *Sivler,* and then click the right mouse button to display the options menu.
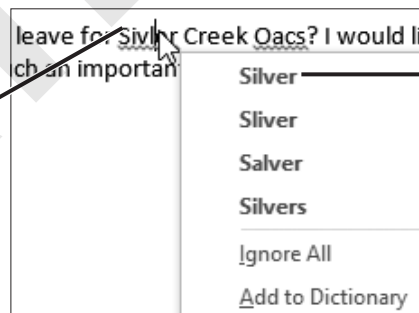
   B Choose the correct word, *Silver,* from the list of suggestions.

7. Right-click *Chande*, which is the correct spelling, and choose **Ignore All** from the options menu.

8. Choose **Review→Proofing→Spelling & Grammar** ✓.

9. Follow these steps to address the next error in the message:
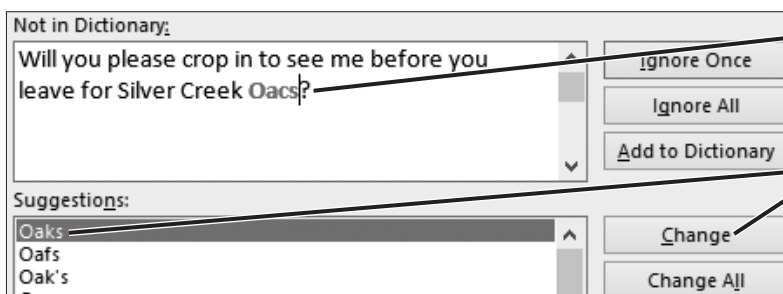
   A Look at the red word that is a possible error and determine if it is an error.

   B Ensure that *Oaks* is the highlighted suggestion and click **Change**.

10. Click the **Change** button to accept the suggested word, *final*, for the next error.

11. Click the **Change** button to accept the suggested word, *signature*, for the next error.

12. Click **OK** in the Microsoft Outlook window indicating that the spell check is complete and you are good to go (even though you *are not* good to go!).

13. Proofread the first sentence, double-click *crop,* and type **stop**.

14. Proofread the last sentence, double-click *manner,* and type **matter**.

15. Proofread the signature, double-click *Shrank,* and type **Thank**.

16. Send the message.

# Handling Incoming Messages

Outlook allows many choices of what to do with incoming messages. For example, you can read and delete, read and save, reply, forward, move to another folder, or print. If the message has a file attached to it, you can save the attachment on your hard drive or other storage device, separate from the email message.

The Send/Receive Button

When you click the Send/Receive All Folders button on the Send/Receive tab, Outlook first sends any messages still in the Outbox, and then checks the mail server for any new messages. You can check for new messages at any time by using the Send/Receive button. However, most users simply have Outlook continually check for new messages on a regular basis automatically.
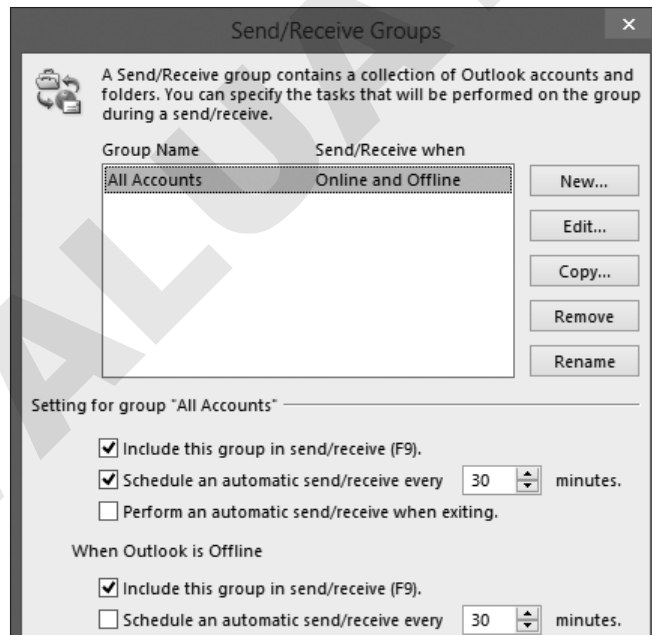
By default, Outlook is set to automatically send and receive every 30 minutes. You can change this default in the Send/ Receive Groups window.

When new messages arrive, the following notifications occur (based on default settings):

- A short sound plays.
- A little icon of an unopened envelope appears in the Outlook button on the taskbar. After you open the message, the envelope disappears from the button.
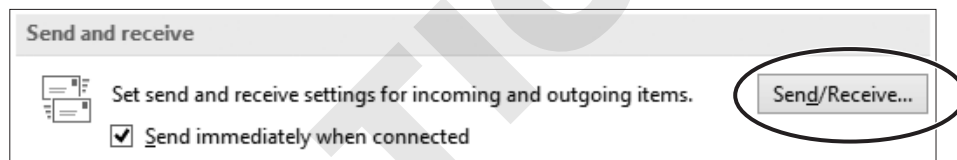
DEVELOP YOUR SKILLS FC-OUT02-D07

Check for Messages and Change the Automatic Setting

WebSim   FC-OUT13-W0207

1. Follow the step for your situation:
   - **If using the WebSim:** From the left navigation bar, click **Lesson 2**; then click **FC-OUT13-W0207 Check for Messages and Change the Automatic Setting**.
   - **If using Outlook "live":** Skip to **step 2**.

2. Choose **Send/Receive→Send & Receive→Send/Receive All Folders** .

3. Choose **File→Options** and click the Advanced tab on the left.

4. Scroll down until you see the Send and Receive section of the Outlook Options window, and then click the **Send/Receive** button.

> **Send and receive**
>
> Set send and receive settings for incoming and outgoing items.   [Send/Receive...]
>
> ☑ Send immediately when connected

5. Follow these steps to change the send/receive settings:

> Setting for group "All Accounts"
>
> ☑ Include this group in send/receive (F9).
>
> ☑ Schedule an automatic send/receive every 15 minutes.
>
> ☑ Perform an automatic send/receive when exiting.
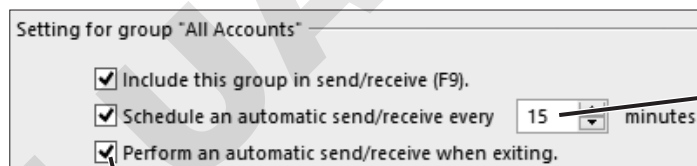
A Click the down arrow until you see **15** displayed.

B Click to choose for Outlook to **Perform an Automatic Send/Receive When Exiting**.

6. Click Close in the **Send/Receive** window and OK in the **Outlook Options** window.

Reading Messages

A new message is displayed first in the Inbox. The message is indicated as new with bold, blue type and a blue bar along the left side. To mark a message as unread, move your mouse pointer over the blue bar and click to change the status of the message (the blue bar appears faded as you move your mouse pointer over it).

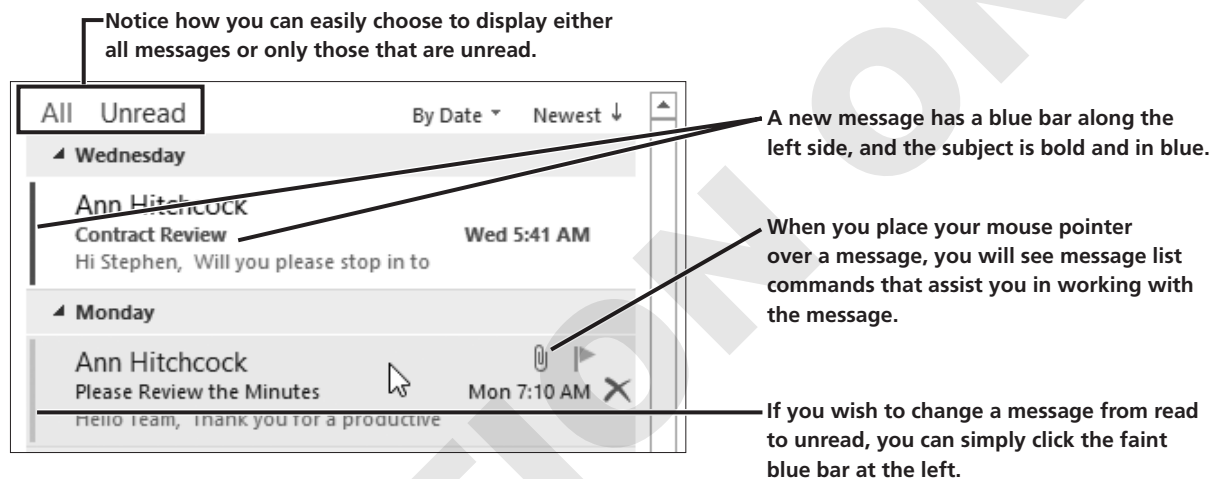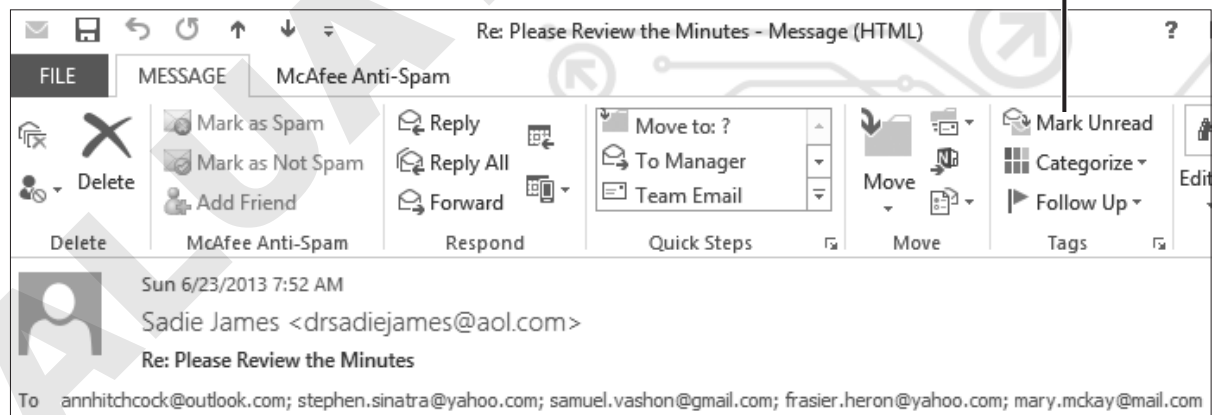When you place your mouse pointer over a message, it becomes highlighted and icons appear that will assist you in working with the message. For instance, an attachment is indicated with a small paperclip. You can read the contents of the message in the Reading pane, or you can double-click the message to open it in its own window. The latter method is helpful if the message is unusually long, because the larger window may enable you to view all of the message without having to scroll down.

NEW! 2013 The new mail view allows you to easily preview your messages before you open them. You will also see message list commands that appear when you move your mouse pointer over a message.

Notice how you can easily choose to display either all messages or only those that are unread.

A new message has a blue bar along the left side, and the subject is bold and in blue.

When you place your mouse pointer over a message, you will see message list commands that assist you in working with the message.

If you wish to change a message from read to unread, you can simply click the faint blue bar at the left.

You can also mark a message as unread from the Message window.

Notice that when you double-click a message in the Inbox, it opens in its own window and has its own Ribbon. In the preceding example, McAfee virus protection has been installed on this computer, so a contextual tab is available to access the McAfee tools.

Saving Attachments

When you receive a message with an attachment, you will notice the name of the file in the message box directly above the body of an actual email message. Some file types, such as Word or Excel files, open automatically when you double-click the attachment. Other files, such as graphic files, display an Opening Mail Attachment dialog box with options to open or save. You

can also right-click an attachment to display a menu with such options as Open, Save As, and Quick Print. A word of caution is important here as viruses are often passed through email messages and their attachments, especially those with an extension of .exe. Be very mindful of the type of file and who it is from before you open it.

When you attempt to open some types of attachments, you will see the Opening Mail Attachment dialog box to warn you of possible dangers.

When you right-click a message attachment, you will see an options menu from which you can choose to save the attachment.
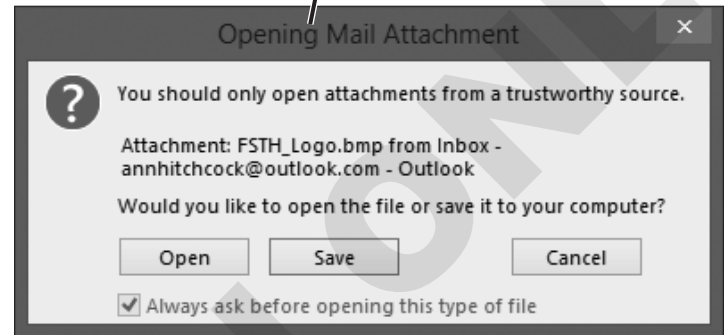
Read Messages and Save an Attachment

WebSim   FC-OUT13-W0208

1. Follow the step for your situation:

   - **If using the WebSim:** From the left navigation bar, click **Lesson 2**; then click **FC-OUT13-W0208 Read Messages and Save an Attachment**.

   - **If using Outlook "live":** Skip to **step 2**.

2. Follow these steps to read a message (if you are not using the WebSim, choose any message in your Inbox):
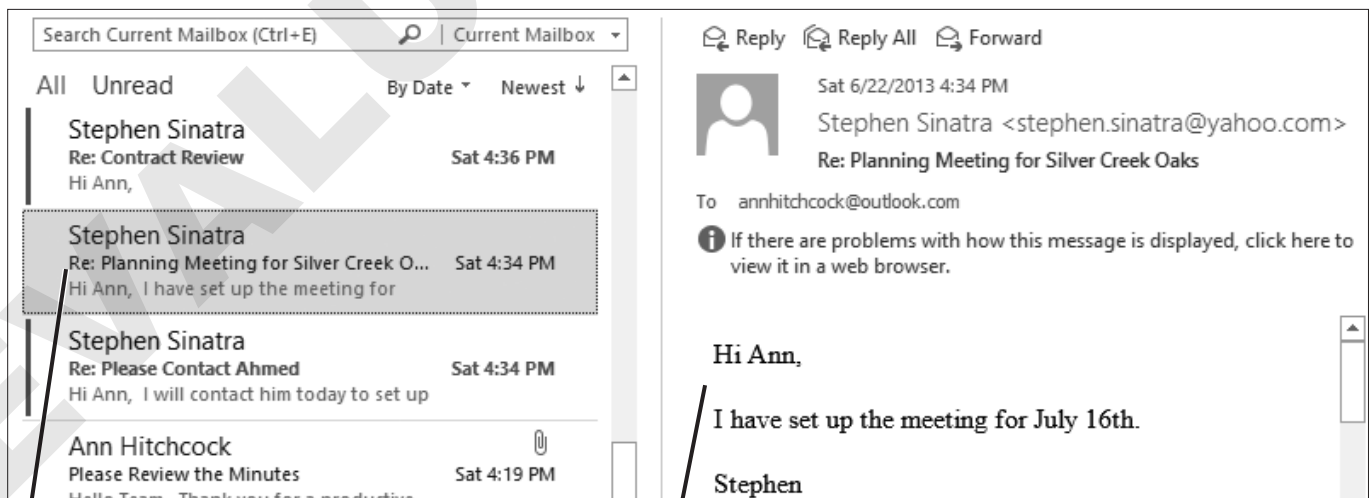
Ⓐ Choose the **Planning Meeting for Silver Creek Oaks** message from Stephen Sinatra.

Ⓑ Read the message in the Reading pane.

3. Follow these steps to save an attachment (if you are not using the WebSim, choose any message in your Inbox with an attachment):

Ⓐ Choose the **Please Review the Minutes** message from Sadie James.

Ⓑ Right-click the attached file.

Ⓒ Choose **Save As**.
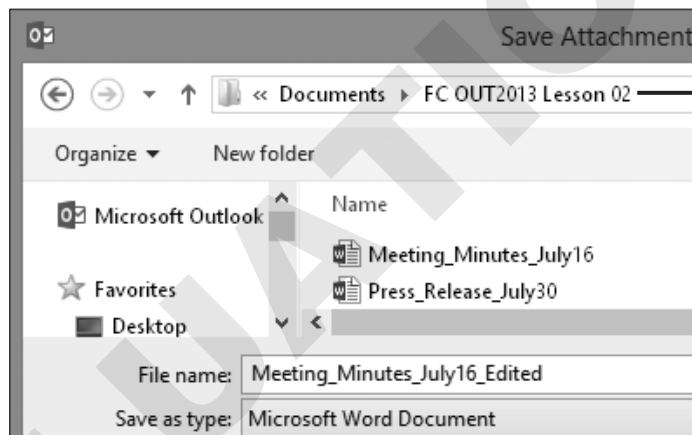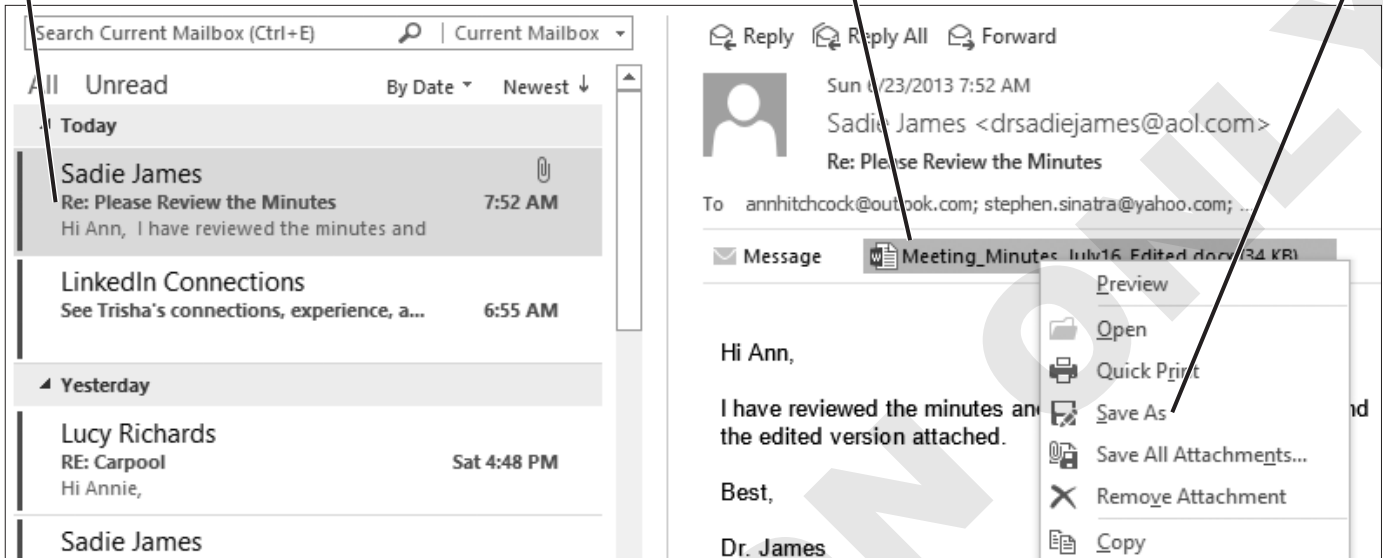
Ⓓ Navigate to your file storage location.

Ⓔ Click **Save**.

Replying to and Forwarding Messages

Outlook makes it easy for you to reply to a message or to share it with others by forwarding it. You may change the subject when replying to or forwarding a message, if you wish. This is especially helpful if you change the gist of the conversation with the reply or forwarded message.

Reply or Reply to All

When you click the Reply button, Outlook opens a new window and places the sender's email address in the To box and automatically places *Re:* at the beginning of the original subject. This

feature is extremely helpful, especially to beginners, because it takes the worry out of making a mistake retyping the email address of the sender. Outlook also includes a copy of the sender's original message in the message box so it will be easy for the sender to see exactly what you are replying to. If you want to send your reply to everyone who originally received the message, you can simply use the Reply to All button instead of the Reply button. Use the Reply to All feature sparingly. If everyone on the original message really doesn't need to see your reply, don't use it! It will only make you look bad and "unsavvy" to those who receive your reply that doesn't directly apply to them.

Forwarding a Message

You may receive a message that wasn't intended for you or that you would like to share with others. You can do this with the Forward command. As with replying, Outlook opens a new window, but this time it leaves the To box empty so you can enter the email address to which you would like to forward the message. When you forward a message, Outlook places *Fw:* in front of the original subject. This lets the recipients know without opening the message that it has been forwarded through you from someone else. And remember, when someone forwards you a file, you don't really know where it came from. Be careful when opening messages and attachments.

Note the options on the Message window Ribbon that allow you to reply to or forward messages.
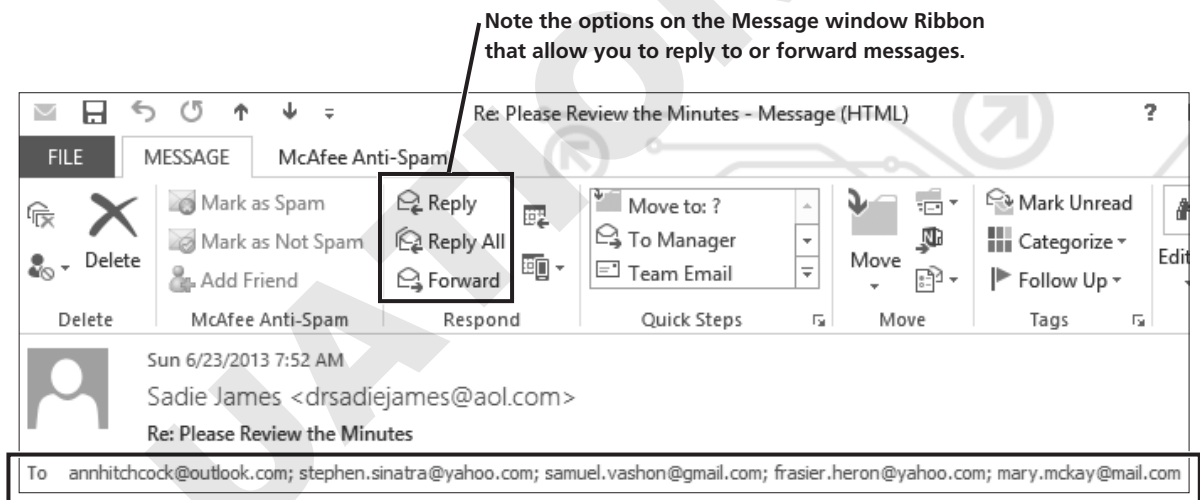
If you were to choose Reply All, the message would go to everyone in the To field.
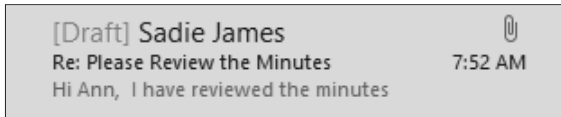
Inline Replies

NEW! 2013

Outlook 2013 allows you to reply to and forward messages right from the Reading pane. This is termed *inline replies*.
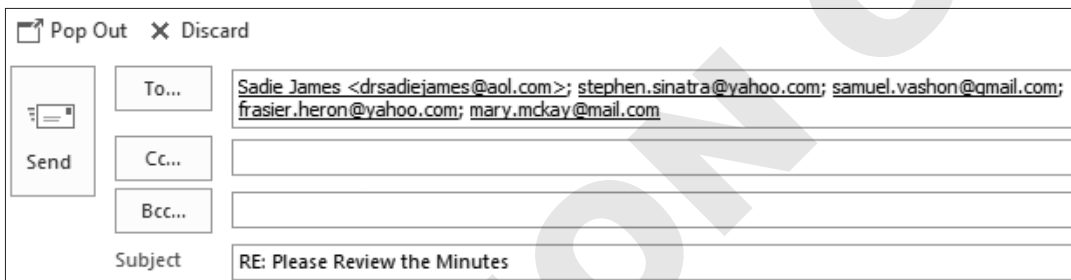
When composing a message in the Reading pane, you have two additional choices: you can quickly discard the message or pop it out of the Reading pane and open it in its own window.

Reply **Reply All** **Forward**

Sun 6/23/2013 7:52 AM

Sadie James <drsadiejames@aol.com>

Re: Please Review the Minutes

To annhitchcock@outlook.com; stephen.sinatra@yahoo.com; samuel.vashon@gmail.com; frasier.heron@yahoo.com; mary.mckay@mail.com

When viewing a message in the Reading pane, you can choose to quickly reply or forward it inline.

[Draft] Sadie James

Re: Please Review the Minutes   7:52 AM

Hi Ann, I have reviewed the minutes

Once you choose to reply to or forward a message, Outlook places *[Draft]* in front of the sender's name.

Pop Out **✕ Discard**

Send	To...	Sadie James <drsadiejames@aol.com>; stephen.sinatra@yahoo.com; samuel.vashon@gmail.com; frasier.heron@yahoo.com; mary.mckay@mail.com
	Cc...	
	Bcc...	
	Subject	RE: Please Review the Minutes

When you choose to reply or forward inline, the message stays docked in the pane and provides buttons enabling you to Pop Out (open it in its own window) or Discard the message.

DEVELOP YOUR SKILLS FC-OUT02-D09
Respond To and Forward Messages

WebSim   FC-OUT13-W0209

1. Follow the step for your situation:

- **If using the WebSim:** From the left navigation bar, click **Lesson 2**; then click **FC-OUT13-W0209 Respond to and Forward Messages**.
- **If using Outlook "live":** Skip to **step 2**.

2. Follow these steps to reply to a message:

Ⓐ Click the **Please Review the Minutes** reply from Sadie James.   Ⓑ Click **Reply**.

Search Current Mailbox (Ctrl+E) 🔍 Current Mailbox ▾		**Reply** **Reply All** **Forward**
All Unread By Date ▾ Newest ↓		Sun 6/23/2013 7:52 AM
▲ Today		Sadie James <drsadie
Sadie James		Re: Please Review the Min
Re: Please Review the Minutes 7:52 AM ✕		To annhitchcock@outlook.com; stephen.s
Hi Ann, I have reviewed the minutes		

3. Type this message: **Thank you for catching the omission.**

4. Send the message.

5. Follow these steps to forward a message:

A Click the **Review of Annual Budget** reply from Sadie James.   **B** Click **Forward**.

| Search Current Mailbox (Ctrl+E) 🔍 | Current Mailbox ▾ | Reply Reply All Forward |

All Unread   By Date ▾ Newest ↓

Sadie James
Re: Review of Annual Budget   Sat 4:42 PM
I think we should plan on higher

Sat 6/22/2013 4:42 PM
Sadie James <drsadiejar
Re: Review of Annual Budget

To   annhitchcock@outlook.com; frasier.heron(

6. Type the following message:

A Address the message to **stephen.sinatra@yahoo.com**.

☐ Pop Out ✕ Discard

To...	stephen.sinatra@yahoo.com;
Cc...	
Bcc...	

Send

Subject   FW: Review of Annual Budget

Hi Stephen,

Please contact Dr. James to get the information to make the
adjustment to the budget prior to our meeting.

B Type the message body as shown.

C Click **Send**.
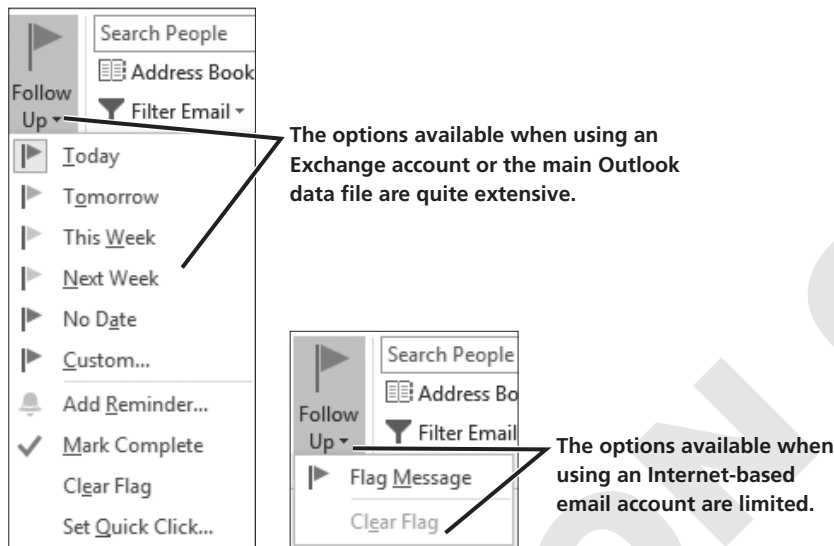
Ann

Flagging Messages

Many times you will read a message and know that you need to take further action on it. You can choose to flag the message right from either the message list command in the main Outlook window or the message window. These flagged messages will be added to your To-Do list, and you can search for them in your Inbox as well.

The options available when using an Exchange account or the main Outlook data file are quite extensive.

The options available when using an Internet-based email account are limited.

When you choose Home→Tags→Follow Up, the resulting menu will look different depending on whether you are using an Exchange account or an Internet account such as Outlook.com.

**DEVELOP YOUR SKILLS FC-OUT02-D10**

Flag a Message

WebSim   FC-OUT13-W0210

1. Follow the step for your situation:
   - **If using the WebSim:** From the left navigation bar, click **Lesson 2**; then click **FC-OUT13-W0210 Flag a Message**.
   - **If using Outlook "live":** Skip to **step 2**.

2. Move your mouse pointer over the **Re: Please Contact Ahmed** message from Stephen and click the red flag when it appears. If you are not using the WebSim, flag any message in your Inbox.

Printing Messages

You can print a message just as you print any other document. From Backstage view, you can preview the selected message and choose print options. The default style to print messages is called Memo style. It prints your name, the message header information (such as subject and date), and the message content. The Table style prints the list of items being displayed in the Contents window, such as the list of emails in the Inbox.
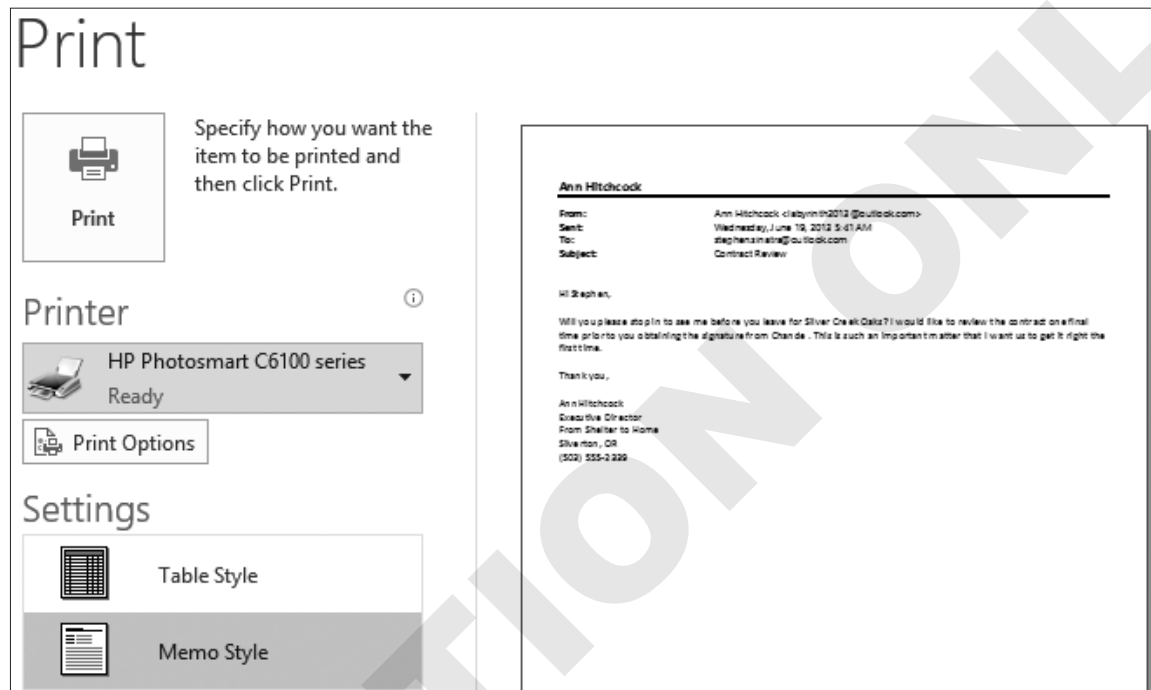
In Backstage view, you can choose the printer to which to print, whether to print in Table or Memo style, and issue the print command. To the right of these options, you can also see a preview of what the message will look like printed.

To print an attachment, you can open it and print it from its particular program. For example, Microsoft Excel opens for an Excel spreadsheet attachment, Microsoft Word opens for a standard Word document, Adobe Acrobat opens for a PDF file attachment, and so forth. Or, you can also choose to Quick Print to your default printer if you right-click the attachment.

DEVELOP YOUR SKILLS FC-OUT02-D11

Print a Message with an Attachment

WebSim   FC-OUT13-W0211

1. Follow the step for your situation:
   - **If using the WebSim:** From the left navigation bar, click **Lesson 2**; then click **FC-OUT13-W0211 Print a Message with an Attachment**.
   - **If using Outlook "live":** Skip to **step 2**.
2. Select the **Re: Contract Review** message from Sadie James.
3. Choose **File→Print**, and then choose **Print Options** to display the Print dialog box.

**4.** Follow these steps to print the message with its attachment:

Ⓐ Click to place a checkmark in the **Print Attached Files** box.

Ⓑ Click **Print**.
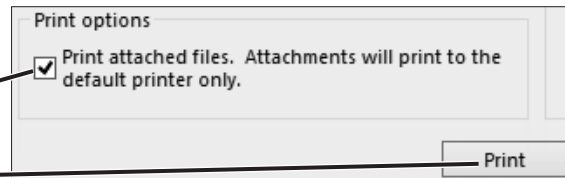
Organizing Messages

You may want to keep some messages you send or receive for future reference. Leaving all incoming messages in the Inbox and outgoing messages in the Sent Items folder can become overwhelming as the number of messages grows. Typically, you will have messages that somehow relate to each other. For example, you may send and receive messages for meetings or special projects. An easy way to keep the messages organized is to store them in separate folders.
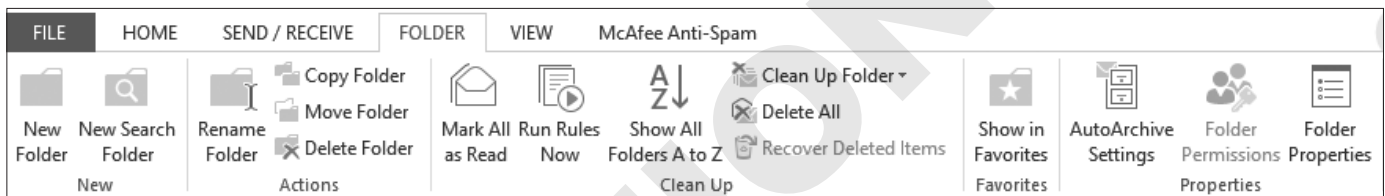
The Folder tab of the Ribbon provides options to help manage your folders.

Creating Folders

The folder structure you decide upon will be the one that works best for you. For example, maybe you work on multiple projects. In that case, creating folders for each project name and saving messages related to each project can help keep you organized. In the illustration displayed, you can see that Ann has chosen to create folders for the facilities with which she is working. You can use the Folder tab on the Ribbon to create a new folder, or simply right-click an existing folder and choose New Folder from the menu to create a subfolder.
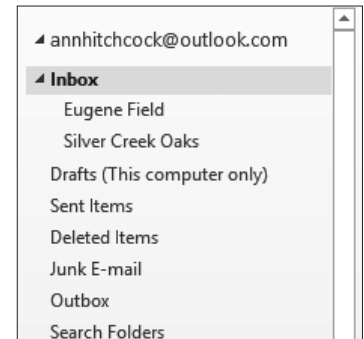
Adding Folders to Favorites

You can add a list called Favorites to the top of the Folder pane. You get to choose which folders Outlook displays here, based on how you use the program. The order in which the folders are displayed is based on the order in which they were added to the list. However, you can drag them to place them in any order you wish. You can also add or delete folders from your Favorites at any time.
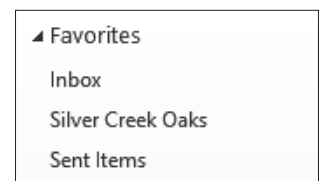
Ann has chosen to include three folders in her Favorites.

DEVELOP YOUR SKILLS FC-OUT02-D12
# Create Folders and Add a Favorite

WebSim   FC-OUT13-W0212

1. Follow the step for your situation:
   - **If using the WebSim:** From the left navigation bar, click **Lesson 2**; then click **FC-OU13-W0212 Create Folders and Add a Favorite**.
   - **If using Outlook "live":** Skip to **step 2**.

2. Right-click the **Inbox** folder and choose **New Folder** from the menu.
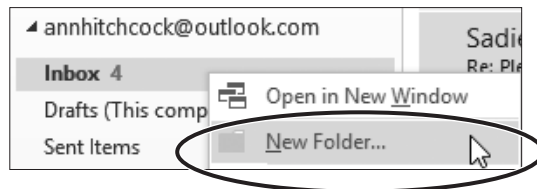
3. Type **Silver Creek Oaks** and tap Enter.

4. Right-click the **Inbox** folder again and choose **New Folder**.

5. Type **Eugene Field** and tap Enter.

6. Follow these steps to add a folder to your Favorites:

   A Click the **Silver Creek Oaks** folder and begin to drag it up toward Favorites.
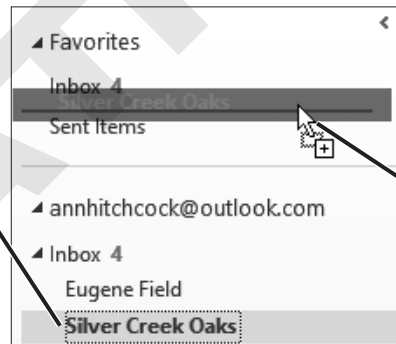
   B Place the copy mouse pointer between Inbox and Sent Items and release.

Moving and Copying a Message to a Folder

Once you have folders created, you can move new incoming or outgoing messages into them. There are two methods to move a message to a folder: a Ribbon command or drag and drop.

You can copy a message and place it in more than one folder by holding down the Ctrl key while dragging it onto a folder. Or, you can use the Copy to Folder command on the drop-down menu of the Move button in the Move group on the Ribbon.

Moving or Copying a Group of Messages

At times messages will fly back and forth: incoming, replying, forwarding, sending, and so forth. You may not take the time with each and every message to immediately move it into a folder. No worry; you can select multiple messages and move them all at the same time from the Inbox or Sent Items folder into another one. To select multiple messages, hold down Ctrl and click individual messages in the list. Or, if you want to select the complete list or adjacent messages in a list, you can hold down Shift instead. In that case, you select the first message you want, hold down Shift, and click the last one you want. The entire list is then highlighted and ready to move, copy, or even delete.

DEVELOP YOUR SKILLS FC-OUT02-D13
Move Messages to a Folder

WebSim   FC-OUT13-W0213

1. Follow the step for your situation:

   - **If using the WebSim:** From the left navigation bar, click **Lesson 2**; then click **FC-OUT13-W0213 Move Messages to a Folder**.
   - **If using Outlook "live":** Skip to **step 2**.

2. Click to display the **Inbox**.

3. Follow these steps to move a message:
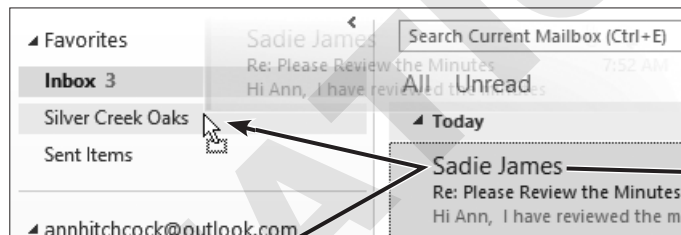
Ⓐ Place your mouse pointer over the message from Sadie James.

Ⓑ Click and drag it over to the **Silver Creek Oaks** folder and then release.

4. Follow these steps to select three messages to move to a folder:

Ⓐ Click **Sent Items**.
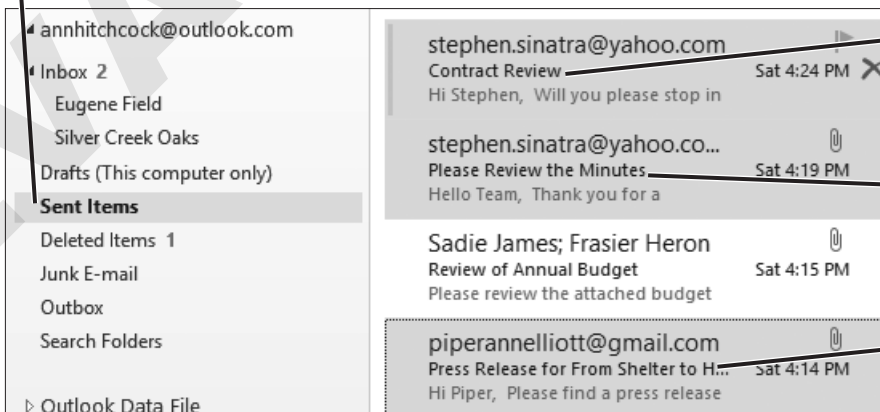
Ⓑ Click the **Contract Review** email.

Ⓒ Hold down Ctrl and click **Please Review the Minutes**.

Ⓓ Continue holding down Ctrl and click **Press Release for From Shelter to Home**.

5. Choose **Home**→→**Move**.

6. Choose **Silver Creek Oaks** from the menu.

Quick Steps

Microsoft Outlook has a fantastic, time-saving feature called Quick Steps. There are built-in quick steps that can be customized—or you can create your own. Quick Steps help by automating repetitive tasks. For example, suppose a message arrives that you would like to forward to your manager or your entire team or that you would like to quickly move to a folder. With one click of the button, the task can be completed. The first time you use each Quick Step, you will be prompted for relevant information, such as the email address of your manager or your team. From then on, it takes only one click to activate the command. What a time-saver!
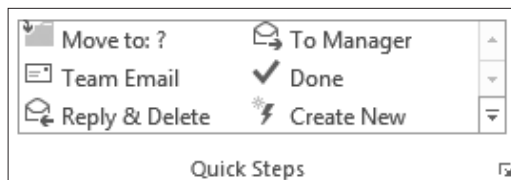
Quick Steps can be found on the Home tab. By default, five are created for you when you first use Outlook.
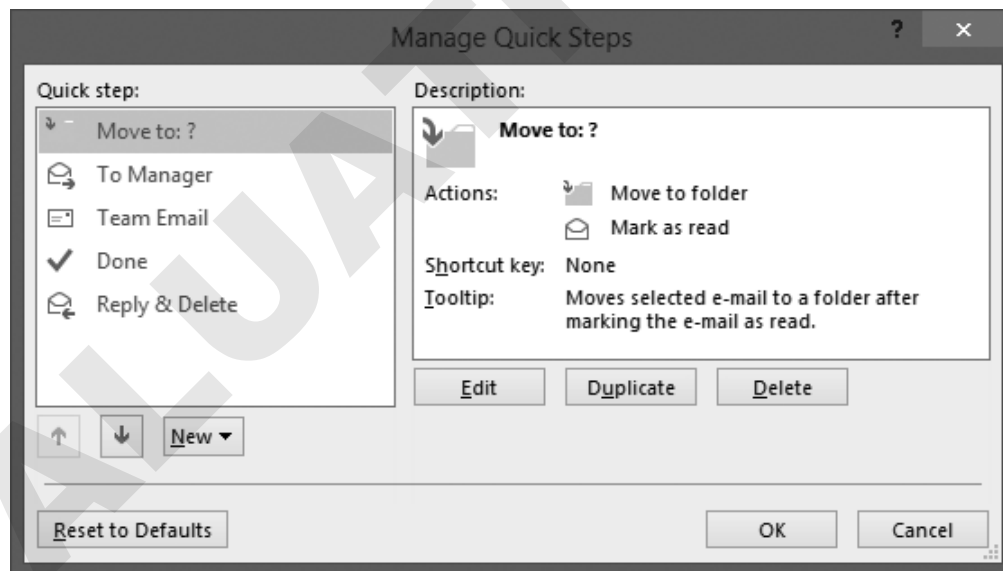
You can create new, edit, reorder, delete, duplicate, reset to defaults, and view descriptions about your Quick Steps in the Manage Quick Steps window.

Rules

Rules can be set up in Outlook to automate certain tasks. For instance, you can have messages that meet certain criteria automatically move into a specific folder. Or, you can choose for Outlook to play a specific sound when you receive a message from a particular person.

The Create Rule window allows you to set up rules to automate specific tasks in Outlook.

DEVELOP YOUR SKILLS FC-OUT02-D14
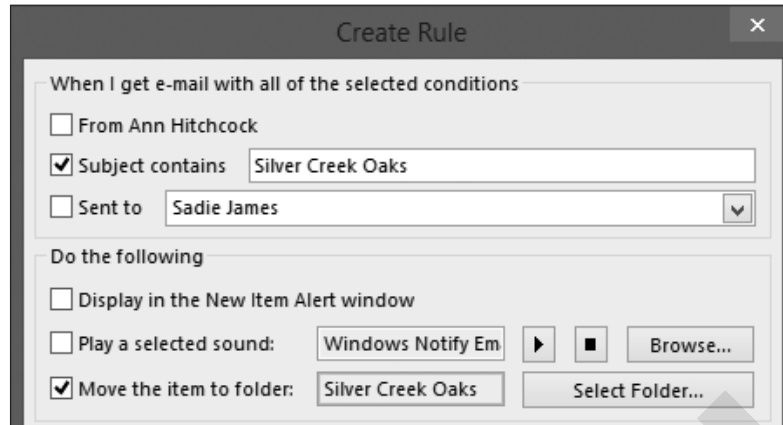
Use Quick Steps and Rules

WebSim   FC-OUT13-W0214

1. Follow the step for your situation:
   - **If using the WebSim:** From the left navigation bar, click **Lesson 2**; then click **FC-OUT13-W0214 Use Quick Steps and Rules**.
   - **If using Outlook "live":** Skip to **step 2**.

2. Click the **Inbox** in the **Folder pane**.

3. Choose **Home→Quick Steps→** [Move to: ?].

4. Follow these steps to set up the Quick Step:

Ⓐ Click the drop-down arrow and choose **Silver Creek Oaks**.

Ⓑ Hold down [Shift] and tap [Tab] twice.

Ⓒ Type **Move to SCO**.

Ⓓ Click **Save**.

First Time Setup
This quick step moves mail to a specified folder. After this Quick Step is created, you do not have to enter this information again.

Name: Move to SCO

Actions

☑ Move to folder   Silver Creek Oaks - annhitchcock@outlook.com

☑ Mark as read

---
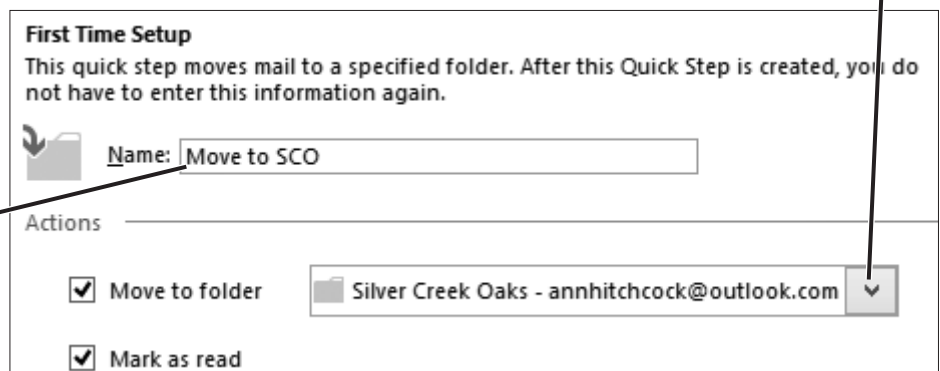
5. Follow these steps to use the new Quick Step:

Sadie James
Re: Review of Annual Budget   Sat 4:42 PM
I think we should plan on higher

Mary McKay
Re: Please Review the Minutes   Sat 4:39 PM   **Ⓐ** Click the message from
I will be heading to the office supply   **Mary McKay**.

Samuel Vashon
Re: Please Review the Minutes   Sat 4:37 PM
Hi Ann, I will make sure that the

Stephen Sinatra   **Ⓑ** While holding down Shift,
Re: Contract Review   Sat 4:36 PM   click the **Contract Review**
Hi Ann,   message from Stephen.

Move to SCO   To Manager   ▲
Team Email   ✓ Done   ▼   **Ⓒ** Click the **Move to SCO**
Reply & Delete   Create New   ≡   Quick Step.

Quick Steps

6. Choose **Home→Move→Rules ▼ →Create Rule**.

7. Follow these steps to create the new rule:

Ⓐ Click the **Subject contains** checkbox.

When I get e-mail with all of the selected conditions
☐ From Stephen Sinatra
☑ Subject contains   Silver Creek Oaks   **Ⓑ** Tap Tab and type **Silver Creek Oaks**.
☐ Sent to   me only

Do the following
☐ Display in the New Item Alert window

Ⓒ Click the **Move the item to folder** checkbox.

☐ Play a selected sound: Windows Notify Em ▶ ■ Browse...
☑ Move the item to folder: Silver Creek Oaks   Select Folder...

Ⓓ Click **Silver Creek Oaks**.

Choose a folder:
▲ Inbox (1)
   Eugene Field
   Silver Creek Oaks   **Ⓔ** Click **OK**.

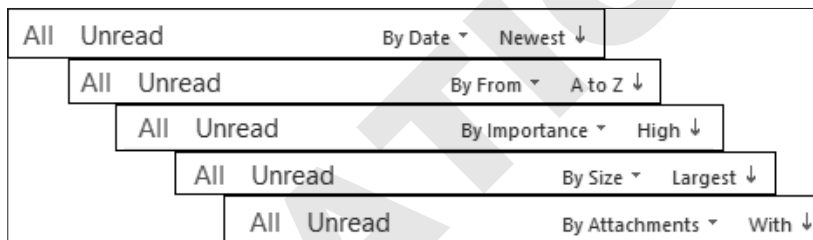**8.** Click **OK** in the Create Rule window.

9. Click in the **Run this rule now…** checkbox and then click **OK**.

Success

⚠ The rule "Silver Creek Oaks" has been created.

☑ Run this rule now on messages already in the current folder
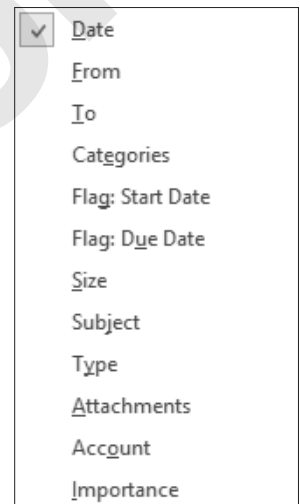
OK
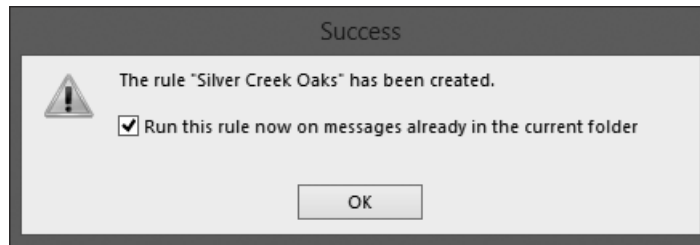
Sorting Messages in a Folder

Emailing is such a popular method of communicating today that the number of messages in the Inbox and Sent Items boxes can quickly add up. And, even if you have created folders to store related messages, when you're looking for that one special message you need to refer to, finding it quickly can sometimes pose a problem. Outlook 2013 allows you to easily sort your messages in the selected folder. By default, Outlook sorts by date, from newest to oldest. To locate a message that you need, you can change the criteria by which messages are sorted as well as the order in which they are listed.
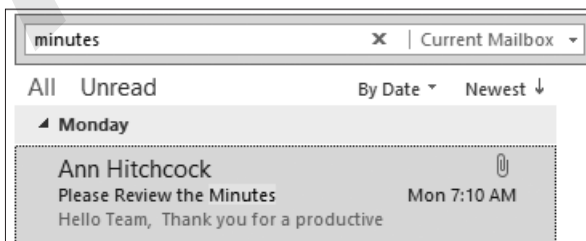
| ✓ | Date |
| From |
| To |
| Categories |
| Flag: Start Date |
| Flag: Due Date |
| Size |
| Subject |
| Type |
| Attachments |
| Account |
| Importance |

There are 12 criteria by which you can sort your messages.

All   Unread   By Date ▾   Newest ↓
　All   Unread   By From ▾   A to Z ↓
　　All   Unread   By Importance ▾   High ↓
　　　All   Unread   By Size ▾   Largest ↓
　　　　All   Unread   By Attachments ▾   With ↓

Notice that as you change the criteria by which you sort your messages, the order listed changes as well.

Searching for a Message

If you were not able to easily find a message by sorting the messages in a folder, you may wish to search for it instead. Outlook's search feature works much like most others—that is, by typing a keyword contained in a message. Initially, the search is performed on the selected folder. If it's not found there, you can switch the option to search all folders.

minutes   ✕ | Current Mailbox ▾

All   Unread   By Date ▾   Newest ↓

◢ Monday

Ann Hitchcock   📎
Please Review the Minutes   Mon 7:10 AM
Hello Team, Thank you for a productive

To find the message she sent with the meeting minutes attached, Ann searched using the keyword *minutes*. Outlook highlights the keyword when it displays the results.

DEVELOP YOUR SKILLS FC-OUT02-D15
Search for a Message

WebSim   FC-OUT13-W0215

1. Follow the step for your situation:
   - **If using the WebSim:** From the left navigation bar, click **Lesson 2**; then click **FC-OUT13-W0215 Search for a Message**.
   - **If using Outlook "live":** Skip to **step 2**.

2. Click the **Silver Creek Oaks** folder in the Folder list.

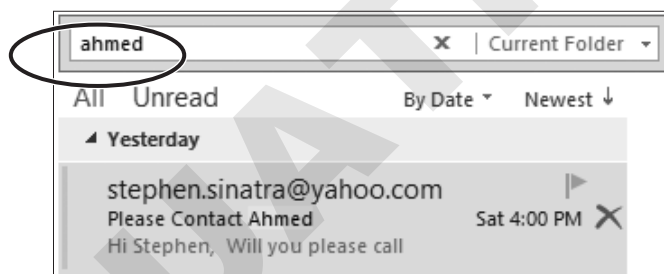3. Follow these steps to search by name:

   Ⓐ Click the **By Date** button.
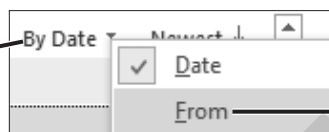
   Ⓑ Click **From**.

   Ⓒ Type **st** to search for messages from Stephen Sinatra.

4. Click the **Sent Items** folder in the Folder pane.

5. Click in the **Search Sent Items** box at the top of the **Inbox** and type **ahmed**.

   ```
   ahmed                          ✕  | Current Folder ▾
   All  Unread               By Date ▾   Newest ↓
   ◢ Yesterday
     stephen.sinatra@yahoo.com           ▷
     Please Contact Ahmed          Sat 4:00 PM ✕
     Hi Stephen, Will you please call
   ```

6. Click the **Close** ✕ button to the right of *ahmed* to close the search.

Deleting Messages

When you delete a message, it is sent to the Deleted Items folder. It's important to note that the message is still on your computer until you empty this folder. The nice thing about this is, if you delete a message by mistake, until the Deleted Items folder is emptied, you can move the message back into the folder from which you deleted it. If you are using Outlook in a corporate setting, your systems administrator probably has set up an automated system whereby your Deleted Items folder is emptied on a regular basis. You can empty the folder manually at any time by right-clicking the Deleted Items folder and choosing Empty Folder. Just as with moving a group of messages at the same time, you can use the same procedure for selecting a group of messages to delete. In Outlook 2013, it's even easier to delete a message, as you can do it with one click of the message list command right from the Inbox. You can also delete the selected message using the Ribbon.

When you move your mouse pointer over a message, a red *x*
appears on the right side; clicking it deletes the message and
moves it to the Deleted Items folder.

DEVELOP YOUR SKILLS FC-OUT02-D16

Delete Messages
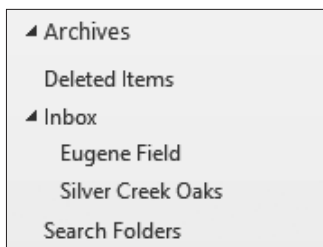
WebSim FC-OUT13-W0216

1. Follow the step for your situation:
   - **If using the WebSim:** From the left navigation bar, click **Lesson 2**; then click **FC-OUT13-W0216 Delete Messages**.
   - **If using Outlook "live":** Skip to **step 2**.

2. Click **Sent Items** in the Folder pane.

3. Click the first message in the list.

4. Hold down the [Shift] key and click the last message you can see in the list.

5. Release [Shift] and tap [Delete] to move the messages to the Deleted Items folder.

6. Right-click **Deleted Items** in the Folder pane and choose **Empty Folder** from the menu.

7. Choose **Yes** in the message box that displays.

Archiving Messages

All items in Outlook are stored in a Personal Folders (.pst) data file. As you accumulate more and more messages and other items such as calendars, the data file becomes especially large, which can ultimately slow Outlook's performance. You can free up space by creating a separate .pst data file in the Archives folder. There may be messages that you do not need to keep in current folders but that you don't want to delete immediately. For example, you may have many messages related to an old project. It's possible that, in the future, you may need to refer to some information contained in those messages. Archives folders are available for the other Outlook components also. So, you could keep copies of your old calendars, for example.

You create folders in the Archives folder exactly the same way you create them in any other folder. You can move messages into the subfolders in Archives by using the same methods as for other folders. Another option is to set your own computer to archive automatically; however, understand that you do not have control over where each item will be archived and, therefore, the items will not be organized. Thus, if you think you'd like to keep some old messages handy just in case you need them, create your own archive subfolders in the Archive Folders Inbox and move messages into them accordingly.

If you have never set up your Archives folders, you will need to do that before messages can be moved to them.


When Ann "turned on" her Archives folders, Outlook automatically created archive folders for all of the folders she created.

DEVELOP YOUR SKILLS FC-OUT02-D17

Create an Archives Folder

WebSim   FC-OUT13-W0217

1. Follow the step for your situation:
   - **If using the WebSim:** From the left navigation bar, click **Lesson 2**; then click **FC-OUT13-W0217 Create an Archives Folder**.
   - **If using Outlook "live":** Skip to **step 2**.

2. Choose **File→Cleanup Tools→Archive**.

3. Click **OK** in the Archive window to select the default options and create the Archives folder.
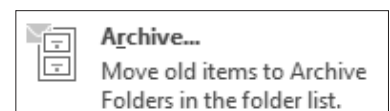
4. Click the **Back** button to leave Backstage view.

5. Click the white triangle to the left of Archives in the Folder pane to expand the list.

6. Click the white triangle to the left of the Inbox folder that is a subfolder of Archives.

7. Drag the message from **Mary McKay** to the Silver Creek Oaks subfolder of Archives.

Concepts Review

To check your knowledge of the key concepts introduced in this lesson, complete the Concepts Review quiz on the student resource center.