

Microsoft Outlook 2013™

Hints & Tips

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Introduction

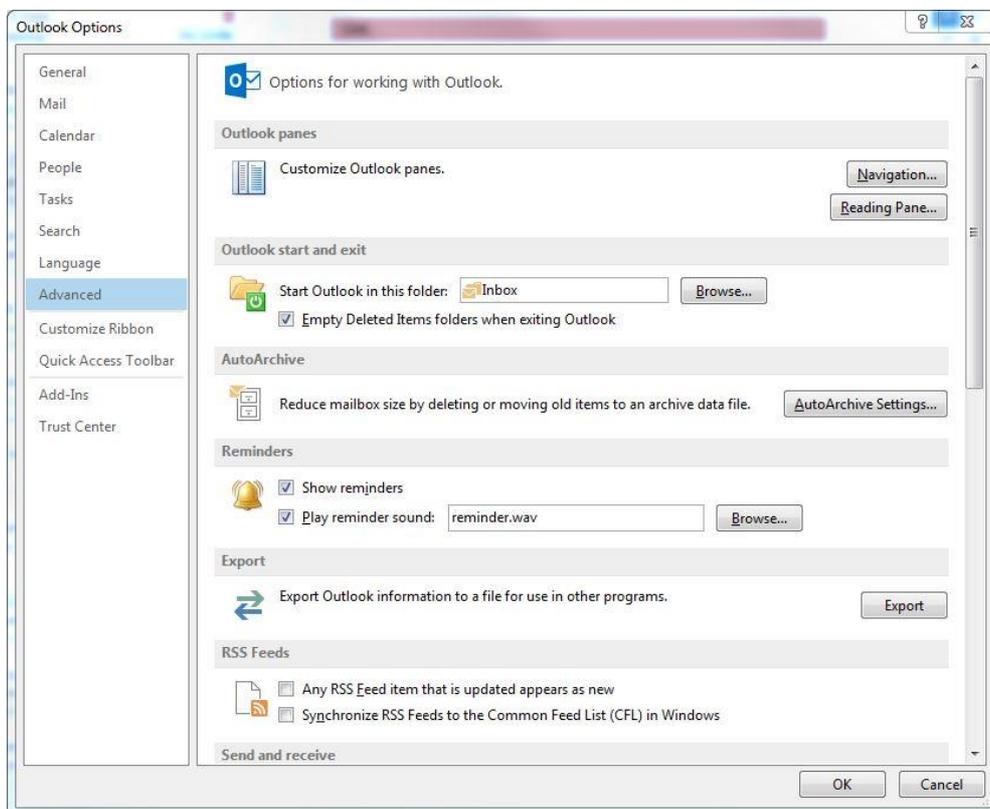
This document contains some hints and tips related to working with Microsoft Outlook 2013 on Exchange.

What Outlook Starts Up In

You can setup Outlook to start, not only in your Mail Inbox, but also in your Calendar, your People/Contacts, any other mail folder that you have, your To-Do List, your Tasks, or your Mailbox (this will probably show as username@reading.ac.uk). This latter option appears with a screen called **Outlook Today** that splits the main screen into your next calendar appointments, a summary of your current tasks, and the number of unread messages in your inbox.

To decide where Outlook starts:

1. Click on the **FILE** tab in the top left, followed by **Options** on the left
2. In Outlook Options, click on **Advanced** on the left



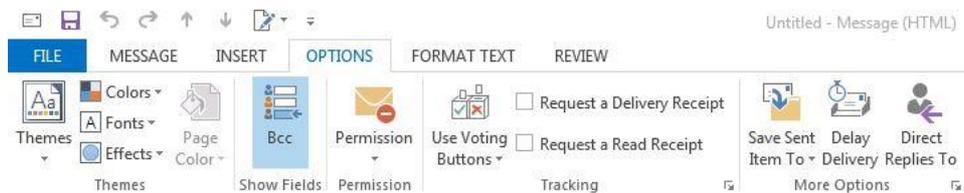
3. Under **Outlook start and exit** and next to **Start Outlook in this folder**, click [**Browse...**]
4. In the **Select Folder** dialog box, choose the folder you want to start up in e.g. To-Do List, Mailbox (username@reading.ac.uk), Inbox, Calendar, Contacts, Tasks
5. Click [**OK**] **two** times to accept the change and close the open dialog boxes - test this out if you like by exiting from Outlook and then going back in again

Sending Email Hints

Tracking a Message

You can put **tracking** onto a message that you are going to send by setting up a **delivery receipt** and/or a **read receipt**. Let's send a new message:

1. Click on the **HOME** tab at the top followed by the **[New Email]** icon on the ribbon
2. Click on the **OPTIONS** tab at the top to get the following **Options** ribbon:



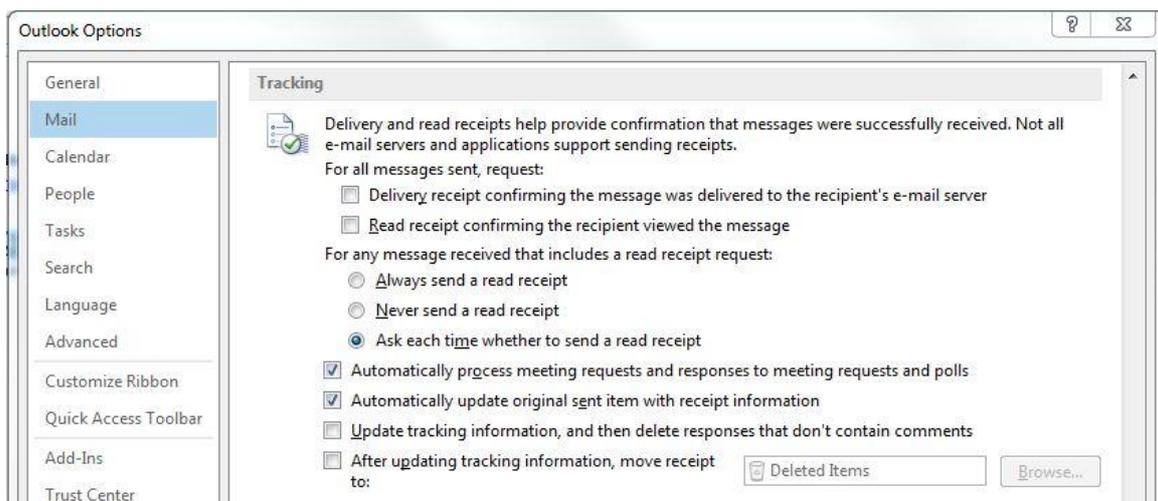
In the **Tracking** group on the ribbon, you'll see options to **Request a Delivery Receipt** and **Request a Read Receipt**. Tick the appropriate box if you want to turn one of these on for this message.

A **delivery receipt** tells you that your e-mail message was **delivered** to the recipient's mailbox. A **read receipt** tells you that your message has been **read**. In both cases, you receive a message notification when your message is delivered or read. The contents of the message notifications are then automatically recorded in the original message in your **Sent Items** folder.

However, **do not rely** solely on these receipts, particularly read receipts. The message recipient, on opening the message, will get a prompt regarding a read receipt, but could decline to send one instead of acknowledging it. In addition, the recipient's e-mail program might not support read receipts.

If you want further options related to tracking, such as putting receipts onto all messages that you send or how you will process receipt responses, you need to get to Tracking Options via:

3. Click on the **FILE** tab followed by **Options** and **Mail**
4. Scroll down to the section under **Tracking** – you should see something like below:



5. Click **[OK]** or **[Cancel]** (if no changes have been made) to come out of the options

Saving a Sent Item

Outlook is usually setup so that a copy of every message you send is saved in a **Sent Items** folder. You can change this to save to another folder or not to save at all, for a particular message, from the **OPTIONS** ribbon that you used for tracking a message:

1. Click on the [**Save Sent Item To**] button in the **More Options** group at the end of the ribbon
2. Choose the option you want (leave as **Use Default Folder** to save in the **Sent Items** folder)

Delay Delivery of a Single Email Message

You might want to use this option for delaying the sending out of a message so that it doesn't get sent before a specific date and time.

1. From the **OPTIONS** ribbon, click on the **Delay Delivery** button in the **More Options** group at the end of the ribbon

The **Do not deliver before** checkbox is automatically ticked – you just need to set the date and time that you do not want to deliver the message before. **Note** the following:

- The message will be held in the **Outbox** folder and will only be sent after the date/time passes
- When closing down Outlook, it will remind you that there are unsent messages and ask if you still want to shut down. Just say **yes**
- If you use Outlook Exchange, it is server based so you do not need to have Outlook open at the specified date and time. The message will get sent when you next open up Outlook

If you do not want this setting:

2. Untick the checkbox next to **Do not deliver before** and click on [**Close**]

Direct Replies to Someone Else

An example of this would be if someone, Y, sends something round that says at the bottom "Can you please reply to X to let them know if you can attend". This means that replies to the original message are directed to X rather than the original sender, Y.

1. From the **OPTIONS** ribbon at the top, click on the **Direct Replies To** button in the **More Options** group at the end of the ribbon

Under **Have replies sent to** you will see that your name has been inserted by default. You can change this by deleting your own name and then choosing who the replies are sent to using the [**Select Names...**] button to search the address books such as the Global Address List and your own Contacts folder.

If you do not want this setting:

2. Untick the checkbox next to **Have replies sent to** and click on [**Close**]

Recall a Sent Message (and why it will probably fail)

Sometimes you might forget to attach a file to the original message or send the wrong information, only to realize after clicking Send that you need to make a change.

The possibility of being able to **recall** the original message and then **replace** it with a message that includes the missing attachment sounds very useful, but, unfortunately, the conditions for it to work are so specific that, in practice, it hardly ever works as you want it to.

The following web page at <http://www.msoutlook.info/question/901> gives some useful advice on:

- How to prevent needing to use recalls in the first place, e.g. use a rule to delay the sending of your emails to allow time for correcting mistakes
- Conditions that need to be met beforehand for the recall to have a chance of working, e.g. the recipient of the message that you want to recall or replace must also be using an Outlook Exchange account within your organisation
- The actual recall process – this is also described below

Firstly, complete sending the new message that you were composing above, whilst looking at the various options, by doing the following:

1. Choose who you want to send the message to either via the **[To...]** button or by typing in the email address directly
2. Type in a **subject** for your message. Write a short message in the main message window and click on **[Send]**

To recall and then optionally replace a message that had been sent previously:

3. Find your **Sent Items** folder (it should be visible in your mail folders) and click on it
4. Double click on the message that you want to recall
5. On the **MESSAGE** ribbon at the top, in the **Move** group, click **Actions**, and then click **Recall This Message...**

The following window will appear:



6. Choose the option that you want depending on whether you want to replace the original message with a new one

Note that if you are sending the message to a large number of people, you may want to **clear** the **Tell me if recall succeeds or fails for each recipient** check box.

7. Click **[OK]**

If you had chosen the option to send a replacement message then at this point you could type in your new message, with any attachment, and then send it.

Note also that if a recipient has already read the message then you won't be able to delete/replace it for that recipient.

Other Outlook Sending Options

Resize attached photos

An option is available to resize large attached pictures. To try this:

1. Start a new e-mail message and fill out the details of whom you're going to send it to and give it a subject
2. On the **MESSAGE** ribbon, in the **Include** group, click **Attach File**
3. Find the picture that you want to attach, select it and click on **[Insert]** – it will show as a link under **Attached**
4. Click the **FILE** tab – the **Info** option is selected and will show at the top as below:



5. Under **Image Attachments**, click **Resize large images when I send this message**.
6. Click the **Back/Left arrow** at the top left to return to your message
7. When you are finished composing your e-mail message, click **Send**

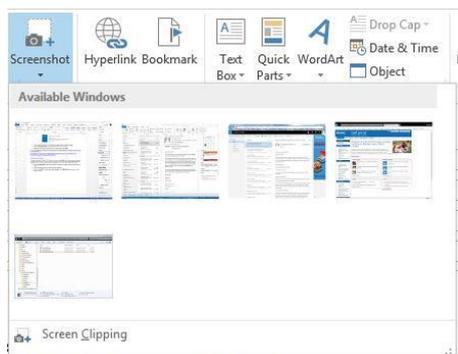
For more information on reducing the size of pictures and attachments, especially the last section on **best practices**, see

<http://office.microsoft.com/en-us/outlook-help/reduce-the-size-of-pictures-and-attachments-HA010355053.aspx?CTT=5&origin=HA010354412>

Include Screenshot

A feature that came in Office 2010 allows you to insert a **screenshot** into your message. Select any currently open window or any part of your computer screen (via a screen clipping) and include a snapshot of it in a message. This could be useful in the case of an error message. To try this:

1. Click on **[New Email]** and fill out the details of whom you're going to send it to and give it a subject
2. Click in the box where you would write your message
3. Click on the **INSERT** tab followed by **[Screenshot]** in the **Illustrations** group to get a screen similar to below:



4. It's probably easiest to choose one of the **Available Windows** rather than use the **Screen Clipping** tool (though the latter is best to pick up just a part of the screen)

Note: If your screenshot is from an Internet Explorer browser window then you will be given the option to **automatically hyperlink your screenshot to the URL of the captured browser window**

The selected window/screenshot should now be in your message which you can either send or cancel.

Organising Email Tips

Achieving Inbox Zero

The following pdf gives you some very useful advice on how to deal with the emails in your inbox:

<http://www.reading.ac.uk/web/FILES/its/AchievingInboxZero.pdf>

Note that this document was developed by Helen Ashley, Learning and Development Officer (IT) at Teesside University.

Especially important are the sections **Act on the contents of your email...** and **Tops tips for dealing with email.**

Further Conversation Options

A couple of further useful options with conversations that are available in Outlook are to **ignore** conversations and **clean up** conversations. Both of these options can be seen on the **HOME** ribbon in the **Delete** group:



If a conversation is no longer relevant to you, you can prevent additional responses from appearing in your Inbox. The **ignore** command moves the whole conversation and any future messages that arrive in the conversation to the **Deleted Items** folder. A couple of prompts may appear confirming what will happen, and you need to click **[OK]** first and then **[Ignore Conversation]** if you want to go ahead.

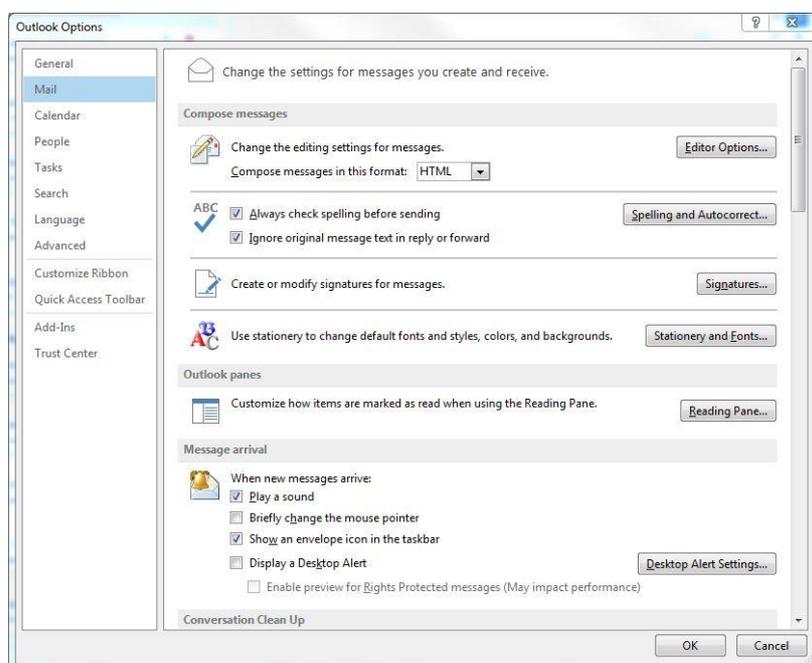
When a message contains all the previous messages in the conversation, you can click **Clean Up** followed by **Clean Up Conversation** to eliminate the other redundant messages, i.e. messages that aren't unread, flagged, categorized or the newest message in a branch of the conversation. A prompt appears confirming what will happen, and you need to click **[Clean Up]** if you want to go ahead (you can also get to further **[Settings]** from this prompt to decide what is meant by redundant messages).

For example, as people reply to a conversation, the response is at the top and the previous messages in the conversation are below. Instead of reviewing each message, keep only the most recent that includes the whole conversation.

Turning off New Email Alerts

If you have Outlook running, but you are working on something else, you may get from time to time a box appearing in the bottom right-hand corner of your screen saying that a new message has arrived. If you find this annoying or distracting then it is best to turn it off as follows:

1. Click on the **FILE** tab in the top left, followed by **Options** on the left
2. In Outlook Options, click on **Mail** on the left



3. Under the section that says, **Message arrival**, make sure the option to **Display a Desktop Alert** is **unticked**

Note that it's also worth **turning off** the other options there if you don't want any new email distractions at all.

Quick Steps

This can be used to turn commands and procedures that you use most often into one click. You can customize the default **Quick Steps**, and create your own buttons that combine your frequent actions. The **Quick Steps more arrow** allows you to create a **New Quick Step** such as **Move to Folder...**, **Flag & Move...**, **New Meeting...**, and other popular commands.

Quick Steps is available on the **HOME** ribbon as shown below:



The options showing in Quick Steps above will probably be different from the commands that you have carried out recently. To further customise these, click on the **group arrow** (the diagonal arrow in a box to the right of Quick Steps) and you will be taken into **Manage Quick Steps**.

Searching for Messages

You can carry out an **instant search** wherever you are in Outlook. For example, if you are looking at messages in your Inbox, all you need to do is click in the **Search Current Mailbox** box at the top of your list and then an extra **SEARCH TOOLS** ribbon will appear as below:

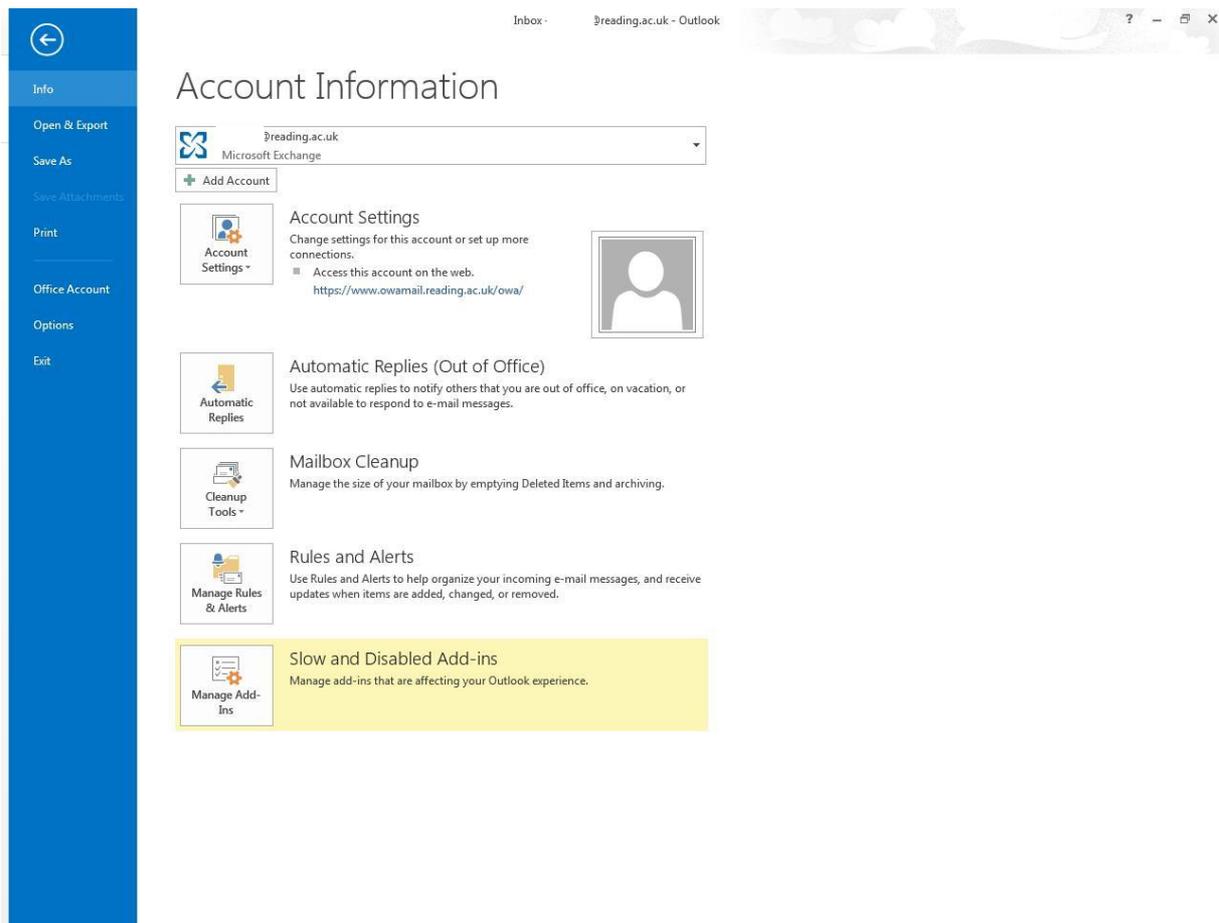


This ribbon makes it easier to narrow your search results through the **Refine** group. This group includes a set of filters that efficiently focus your search to isolate the items that you want. For example, the filters can include who the message is **[From]**, **[Subject]** keywords, and whether the message **[Has Attachments]**. The **[More]** button gives you a list of the **Common Properties**.

Note that you can also extend the search to **[All Mailboxes]** or **[All Outlook Items]**. Under **[Search Tools]** you can get to an **[Advanced Find...]**.

Microsoft Office Backstage View in Outlook

1. Click on the **FILE** tab in the top left to get to what is sometimes called the **Microsoft Office Backstage view** in Outlook. The screen will look similar to below:



The options here allow you to:

- Manage your email accounts through [**Account Settings**] (these include **Delegate Access**, **Download Address Book...** and **Manage Mobile Notifications**)
- Set [**Automatic Replies**] when you are **Out of Office** on business or holiday. A useful link that tells you what to put in an Out of Office message here at the University of Reading is at: <http://www.reading.ac.uk/internal/its/help/its-help-email/its-help-email-OutOfOffice.aspx>
- Manage the size of your mailbox through [**Cleanup Tools**]. One of them, the **Mailbox Cleanup...** tool includes options to:
 - View the size of your mailbox (inbox and other folders)
 - Find items older than a number of days or larger than a certain size
 - View and empty the Deleted Items folder
- [**Manage Rules & Alerts**] to help organise your incoming email messages. Another useful link that gives some examples is at: <http://www.reading.ac.uk/internal/its/help/its-help-email/outlookrules.aspx>

2. To come out of the backstage view, click on the **Back/Left arrow** at the top left

Note that you **Save As** and **Print** from the backstage view. These options (and others) are also available as a backstage view in the other Office products such as Word, Excel, Powerpoint and Access.

Finding further information about a message

Usually the email message at the top of the list of messages will be highlighted. Click on a different message in the list if you want to select that one.

The information at the top of the list of messages is often shown as column headings (to see this in Outlook, it is best to have the Reading Pane turned off - **VIEW, [Reading Pane]** set to **off**). These can vary, but columns often displayed are:

- Attachment (represented by a paper clip)
- From
- Subject
- Received
- Size

The above information will give you a good idea if there is a document or picture **attached** to the message, **who** sent the message, **what** it's about, **when** it arrived, and **how big** it is. If you want to find out even more by reviewing detailed delivery information including internet headers (IT may ask you for this if you have a particular enquiry about an email message) then:

1. Open a message by double clicking on it
2. Click on the **FILE** tab followed by the [**Properties**] button. Header information appears in the **Internet headers** box at the bottom of the *Properties* window
3. [**Close**] the *Properties* window

From this information, you can already decide if the message is something you should read or not. If it's from someone that you don't know, and about a subject that you know nothing about or have no interest in, then it's likely that it's **junk** or **spam** email that can be immediately deleted.

At Reading, a lot of spam email is filtered out - for further details, see

<http://www.reading.ac.uk/internal/its/help/its-help-email/its-exchange/its-exchange-dealingwithspam.asp>

Please be aware that email is susceptible to virus attack. **If you receive email from an unknown source containing an attachment, be very wary about opening it.** The best protection is to have anti-virus software on your computer.

Calendar Tips

Deleting a block of appointments

It's easy enough to delete a single appointment or meeting from your Calendar (just *right* click and **Delete**), but to delete a block, e.g. all appointments in the next 2 weeks, appointments in a particular category, or holidays from a specific country, involves a few more steps as follows:

1. Make sure you're looking at your Calendar
2. Click on the **VIEW** tab at the top
3. Click on the [**Change View**] icon on the left of the ribbon and choose **List** (or **Active** if you only want future or recurring events)
4. **Order** the list by clicking on the column heading that you want them to be ordered by, e.g. **SUBJECT, START, CATEGORIES**
5. **Select** the appointments that you want to delete (you can use normal Windows techniques to select more than one appointment, i.e. **<Shift Click>** or **<Ctrl Click>**)
6. **Right** click on one of the highlighted appointments and choose **Delete**
7. To return to the normal Calendar view, click on the **VIEW** tab at the top followed by **Change View** and **Calendar**

People/Contact Tips

Setting Outlook to Default to the Global Address List

Your address book in Outlook contains both the GAL (Global Address List), your own list of Contacts and other address lists. To access the address book when looking at your email in Outlook:

1. Either click on the [**Address Book**] button/icon on the right-hand end of the **HOME** ribbon or press the key combination of **<Ctrl Shift B>**

From the *Address Book* window, you can change the order that the address lists are checked when sending email, and the order that they are shown when opening the address book. To get to these:

2. Click on the **Tools** menu within the *Address Book* window and then **Options...**
3. Under *When sending e-mail* click **Start with Global Address List**
4. Under *When opening the address book* select **Global Address List**
5. Click [**OK**]
6. Close the *Address Book* window by clicking on the **X** in the top right-hand corner

The address book is also another way of managing your People/Contacts by enabling you to quickly and easily add, edit and delete contacts.

Sharing Information

Send a Contact Group to Others

You can send a **contact group** (called **distribution list** in earlier versions of Outlook) or **contact** to others by including it in a message. The recipient can then save it to their People/Contacts and use it as a contact group as well.

To send a contact group in an email:

1. Click **People** in the Navigation Pane to open up your Contacts
2. Find your contact group in the *Contacts* window, *right* click on it, choose **Forward Contact** and finally **As an Outlook Contact**
3. A new email will be created with a **subject** line of your contact group name and the contact group **attached** to the message
4. Make sure that you send the message to an email address taken from the **Global Address List** otherwise the recipient may not receive the attachment as a contact group
5. You can add further details in the message body and then **[Send]** your email

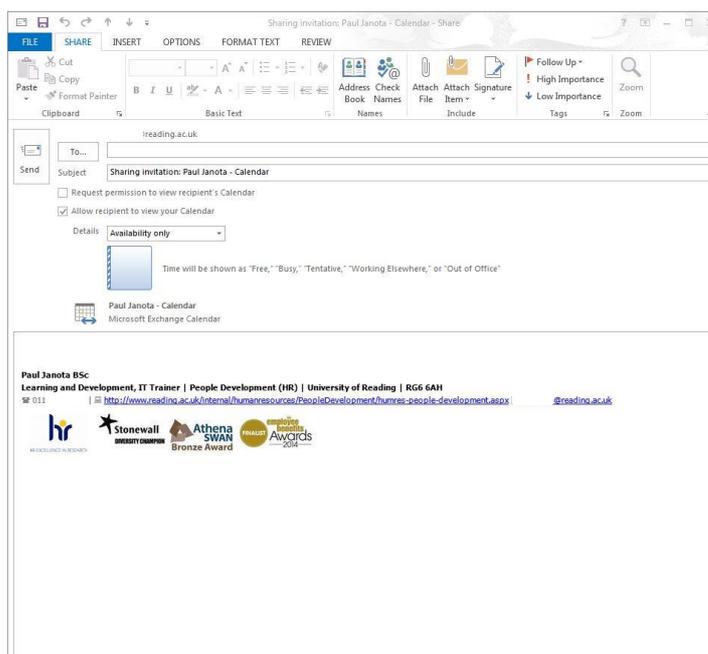
The simplest way to save a contact group sent to you by another person is to drag the contact group attachment from the message onto the **People** tab in the Navigation Pane.

Note that you can also share your contacts with other people so that they can view them via the **[Share Contacts]** icon on the **HOME** ribbon of the *Contacts* window. This will be very similar to the way in which a calendar can be shared as described in the next section.

Share a Calendar

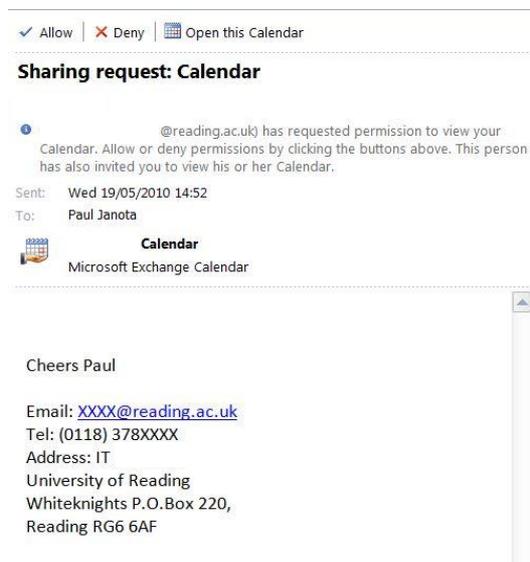
A further step that you might want to take is to share your Calendar with someone else, say in your workgroup, and/or be able to see someone else's Calendar. To share your own calendar:

1. Click on the **[Calendar]** button in the **Navigation pane** at the bottom of the Outlook window, and then the **[Share Calendar]** button in the **Share** group on the **HOME** ribbon at the top. A **Sharing Invitation** window appears as below:



2. Fill in the name of the person who you want to share your calendar with using the **[To...]** button
3. If you want to see if the other person is willing to share their calendar with you then tick the box next to **Request permission to view recipient's Calendar**
4. You can also change the **Details** of what the other person can see in your calendar from **Availability only** (Free/Busy) to **Limited details** (subject of calendar item), all the way up to **Full details**
5. Click on **[Send]** to send the invitation
6. A further prompt appears to which you need to click **[Yes]** if you want the other person to be able to **look at/read** your calendar with the details you have allowed

If you ticked the option to **Request permission to view recipient's Calendar**, you will have to wait for the person who has received the calendar sharing request to allow or deny it as shown below:



Assuming that your colleague chooses **[Allow]** to let you see their calendar, a further prompt comes up about sharing their calendar with you, and if they click on **[Yes]** then something similar to the following prompt will show:



After clicking **[OK]**, your colleague will be able to open your calendar. You should now have received a message in the email from your colleague allowing you to look at their calendar. To do this:

7. Open the relevant email and click **[Open this Calendar]** at the top of the message.

You may have to wait a few seconds and then a new window should open showing both your calendar and your colleague's calendar. By default, these calendars are shown **vertically side by side**, but it is also possible to show them **horizontally** in Outlook to quickly discover the best time to meet by clicking on **[Schedule View]** in the **Arrange** group on the **HOME** ribbon at the top. It is also possible to view calendars in **Overlay Mode**, where they appear on top of each other, by clicking on the left arrow at the top of the right Calendar tab.

You can also put your calendars into different **Calendar Groups**, e.g. to group together those people you frequently work with.

The above method of sharing someone else's calendar will only allow you to **view** their calendar, but not to make any changes or additions to it. To have **editing, creation and deletion** permissions on someone else's calendar, refer to [Allowing access to your calendar](http://www.reading.ac.uk/internal/its/help/its-help-email/its-exchange/its-exchange-access.aspx) (<http://www.reading.ac.uk/internal/its/help/its-help-email/its-exchange/its-exchange-access.aspx>).

Note that information on **organising a meeting** can be found in the [Outlook Beginner's Guide](http://www.reading.ac.uk/web/FILES/its/Outlook2013.pdf) (<http://www.reading.ac.uk/web/FILES/its/Outlook2013.pdf>)

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