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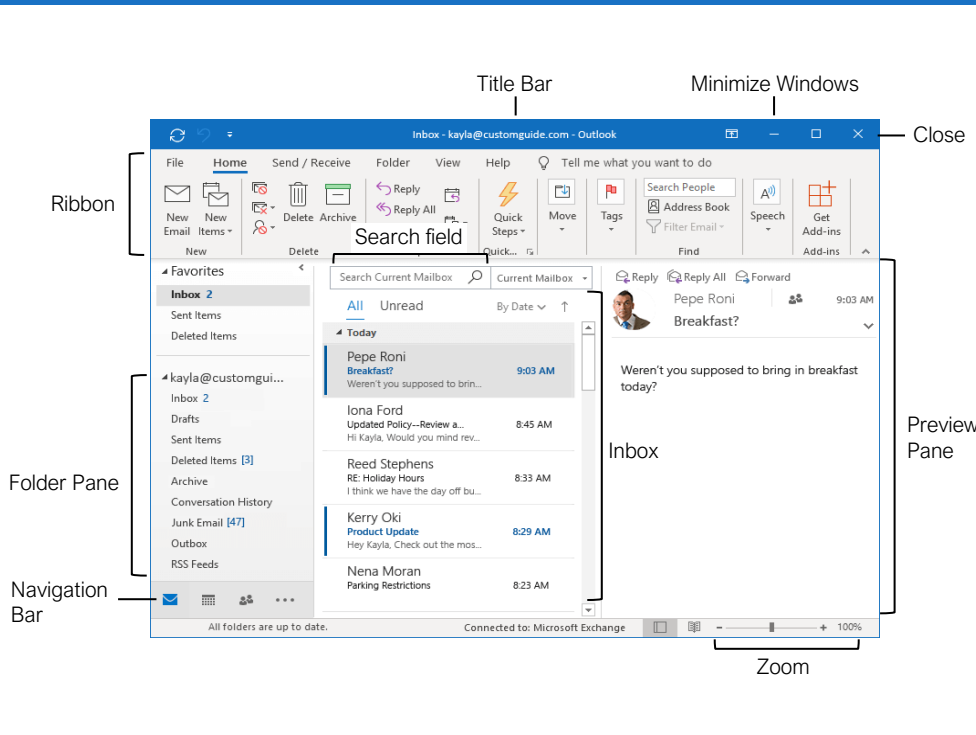
# Outlook Quick Reference

## Basic Skills



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### The Outlook Program Screen



### Keyboard Shortcuts

#### General

Print.....	<b>Ctrl + P</b>
Undo.....	<b>Ctrl + Z</b>
Copy.....	<b>Ctrl + C</b>
Cut.....	<b>Ctrl + X</b>
Paste.....	<b>Ctrl + V</b>
New Item.....	<b>Ctrl + N</b>
Delete selected item.....	<b>Delete</b>
Help.....	<b>F1</b>
Find an item.....	<b>F3</b>
Spell Check.....	<b>F7</b>

#### Navigation

Mail view.....	<b>Ctrl + 1</b>
Calendar view.....	<b>Ctrl + 2</b>
Contacts view.....	<b>Ctrl + 3</b>
Tasks view.....	<b>Ctrl + 4</b>
Notes.....	<b>Ctrl + 5</b>

#### Mail

New Message.....	<b>Ctrl + Shift + M</b>
Reply.....	<b>Ctrl + R</b>
Reply All.....	<b>Ctrl + Shift + R</b>
Forward.....	<b>Ctrl + F</b>
Save message as a draft...	<b>Ctrl + S</b>
Send.....	<b>Alt + S</b>
Find and replace text.....	<b>Ctrl + H</b>
Check for New Messages.	<b>Ctrl + M</b>
Mark as Read.....	<b>Ctrl + Q</b>
Mark as Unread.....	<b>Ctrl + U</b>

#### Calendar

New Appointment.....	<b>Ctrl + Shift + A</b>
Go to Today.....	<b>Ctrl + T</b>
Go to a Date.....	<b>Ctrl + G</b>
Go to Previous Appointment.....	<b>Ctrl + ,</b>
Go to Next Appointment...	<b>Ctrl + .</b>
Day view.....	<b>Ctrl + Alt + 1</b>
Work Week view.....	<b>Ctrl + Alt + 2</b>
Week view.....	<b>Ctrl + Alt + 3</b>
Month view.....	<b>Ctrl + Alt + 4</b>

#### Contacts

New Contact.....	<b>Ctrl + Shift + C</b>
New Contact Group.....	<b>Ctrl + Shift + L</b>
Open the Address Book....	<b>Ctrl + Shift + B</b>

### The Fundamentals

**Navigate Outlook:** Click the icon (or label) for the view you want to open.

- ✉ **Mail** view displays your inbox and lets you browse your mail. The ribbon will display commands related to composing and managing email messages.
- 📅 **Calendar** view displays your calendar. The ribbon will display commands that let you view, create, and edit meetings and appointments.
- 👤 **People** view displays your contacts list. The ribbon will show commands that let you create and edit your contacts and contact groups.
- 📋 **Tasks** view displays your task list. The ribbon will show commands that let you create and modify tasks.

**Use the Folder Pane:** Click a folder in the Folder pane to display that folder's contents.

**Delete an Item:** Select an email, contact, appointment, or task, then click the **Delete** button on the Home tab of the ribbon.

**Restore a Deleted Item:** Click the **Deleted Items** folder in the Folder pane, then click and drag an item back to its original folder.

**Change Views:** Click the **View** tab on the ribbon, then click the **Change View** button and select a view.


### Search

**Search:** Click in the **Search** field at the top of the inbox and begin typing your search.

**Refine Search Results:** While searching, use the options in the Scope group on the Search tab.

- **Current Mailbox** searches all folders within the selected mailbox.
- **Current Folder** only searches within the current folder.
- **Subfolders** expands the search to include all the current folder's subfolders.
- **All Outlook Items** searches everything.
- **From** lets you filter messages from specific senders.
- **Subject** lets you filter by words in the subject line.
- **Has Attachments** lets you filter results by whether they have attachments.
- **Categorized** filters by categories.
- **This Week** displays only items from the current week.
- **Unread** searches only unread messages.
- **Flagged** searches only flagged items.
- **Important** only displays items set to high importance.
- **More** lets you apply advanced criteria.

## Mail


**Compose Email:** Click the **New Email**  button on the Home tab. Enter recipients, a subject, and a message body, then click **Send**.


**Types of Recipients:** When composing a new email, enter email addresses in the address fields.


- **To** contains the primary recipients, whom the message is directed to.
- **Cc (Carbon Copy)** sends a copy of the message. While not the primary audience, these recipients may want to see the information presented. The Cc field is visible to all recipients.
- **Bcc (Blind Carbon Copy)** sends a copy of the message, while keeping the Bcc field secret to other recipients.


**View an Email in the Reading Pane:** Select an email from the inbox to display it.


**Open an Email in a New Window:** Double-click an email in the inbox.


**Mark an Email Read or Unread:** Opening an email, or displaying it in the Reading pane, will automatically mark an unread email as read. Click the **Unread/Read**  button on the Home tab to toggle an email read or unread.


**Reply to an Email:** Select an email in the inbox (or open an email in its own window) and click the **Reply**  button on the ribbon.


**Reply to All Recipients of an Email:** Select an email in the inbox (or open an email in its own window) and click the **Reply All**  button on the ribbon.


**Forward an Email:** Select an email in the inbox (or open an email in its own window) and click the **Forward**  button on the ribbon.

**Create a Signature:** While composing an email, click the **Signature**  button on the Message tab and select **Signatures**. Click the **New** button, enter a name for the signature, and click **OK**. Create the signature in the Edit signature section and click **OK**.

**Insert a Signature:** While composing an email, click the **Signature**  button on the Message tab and select a signature.


**Attach a File:** While composing an email, click the **Attach File**  button on the Message tab. Select a file, then click **Insert**.

**Insert a Picture:** While composing an email, click the **Insert** tab, click the **Pictures**  button, select a picture, and click **Insert**.



**Send Out-of-Office Replies:** Click the **File** tab, click the **Automatic Replies** button on the Info tab, then click the **Send Automatic Replies**  button. Set the start and end dates for the auto reply, enter a message, and click **OK**.


**Set Message Priority:** While composing an email, click the **High Importance**  or **Low Importance**  button on the Message tab.



## Mail


**Insert a Link:** While composing an email, click the **Insert** tab, click the **Link**  button, select a type of link, fill in where the link will lead, and click **OK**.

## People


**Add a New Contact:** Click the **New Contact**  button on the Home tab. Fill in the fields with the information that you have, then click the **Save & Close**  button.




**View the Address Book:** Click the **Address Book**  button on the Home tab. Double-click a contact to open it and see more information.



**Add a Contact from the Address Book:** Click the **Address Book**  button on the Home tab, double-click a contact, click the **Add to Contacts** button, enter any additional information you have, then click the **Save & Close**  button.


**Edit a Contact:** Double-click a contact to open it in a new window, fill in the information fields with any additional information you have, then click the **Save & Close**  button.

**Import Contacts:** Click the **File** tab, click **Open & Export**, and click **Import/Export**. Select **Import from Another Program or File**, then click **Next**. Select a type of file to import, then click **Next**. Click **Browse**, select a file, click **OK**, then click **Next**. Select your **Contacts** folder, click **Next**, then click **Finish**.



**Share a Single Contact:** Select a contact, click the **Forward Contact**  button on the Home tab, and select a sharing format. Address and compose the resulting email, then click **Send**.


**Create a Contact Group:** Click the **New Contact Group**  button on the Home tab, give the contact group a name, and click the **Add Members**  button. Select a source for a contact and double-click a contact to add it. Add as many contacts as you would like, click **OK**, then click the **Save & Close**  button.

**Add Members to a Contact Group:** Double-click a contact group to open it, click the **Add Members**  button, select a source, and double-click a contact to add it. Click **OK**, then click the **Save & Close**  button.

**Remove Members from a Contact Group:** Double-click a contact group to open it, select a contact from the list, and click the **Remove Member**  button.

## Calendar

**Create an Appointment:** From the Calendar view, click the **New Appointment**  button on the Home tab. Enter the appointment's details, subject, location, and start and end time. Click the **Save & Close**  button.

**Edit an Appointment:** Double-click an appointment to open it, edit the appointment details, then click the **Save & Close**  button.

## Calendar



**Reschedule an Appointment:** Click and drag an appointment on the calendar to move it to a different day (in Month view) or time (in Day, Week, and Work Week view).


**Create an All-Day Event:** While creating or editing an appointment, check the **All-day event** check box.


**Set a Reminder:** While creating or editing an appointment, click the **Reminder** list arrow and select how long before the event you'd like to be reminded.


**Change Availability:** While creating or editing an appointment, click the **Show As** list arrow and select an availability:


- **Free** shows that you're available.
- **Working Elsewhere** indicates that you're working from another location.
- **Tentative** shows that you have tentative plans and may or may not be available.
- **Busy** indicates that you're busy and not available.
- **Out of Office** shows that you're out of the office and not available.


**Set Priority:** While creating or editing an appointment, click the **High Importance**  or **Low Importance**  button on the Appointment tab.







**Create a Meeting:** While viewing the calendar, click the **New Meeting**  button on the Home tab. Click **To...** and double-click the contacts you want to invite to the meeting, then click **OK**. Enter the meeting subject, location, date and time, and a message, then click **Send**.

**Track Meeting Responses:** Select a meeting in your calendar and click the **Tracking**  button on the Meeting tab.

**Create a Recurring Appointment:** While creating or editing an appointment, click the **Recurrence**  button on the Meeting tab. Choose a recurrence pattern, set a time range for the recurrence, then click **OK**.

**Edit a Recurring Appointment:** Double-click a recurring appointment to open it, then choose whether to edit **Just this one** appointment or **The entire series**. Edit the appointment or the recurrence settings, then click the **Save & Close**  button.

**Delete a Recurring Appointment:** Select a recurring appointment in the calendar, click the **Delete**  button on the Home tab, and select **Delete Occurrence** (to delete a single instance of the appointment) or **Delete Series** (to delete the entire series).

**Respond to an Invitation:** Select an invitation in your inbox, click the **Accept**  button, **Tentative**  button, or **Decline**  button in the preview pane. Or, select an invited event in your calendar and click the **Accept**  button, **Tentative**  button, or **Decline**  button on the Meeting Series tab. Select whether to send a response and whether to edit it.



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# Outlook Quick Reference

## Intermediate Skills



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### Outlook Calendar View

### Advanced Calendar

Calendar Tab  
(in overlay mode)

The screenshot shows the Outlook interface with the Calendar tab selected. The ribbon includes options for 'New Appointment', 'New Meeting', 'New Skype Meeting', 'Go To', 'Day', 'Work Week', 'Month', 'Manage Calendars', and 'Find'. The calendar grid displays a meeting on April 10 at 10:00am. Labels on the left side identify the 'Mini Calendar', 'Folder Pane', and 'Meeting / Appointment'. A label on the right side points to the date '10' in the grid, labeled 'Selected Date'.

**Schedule Meeting Rooms:** In a new meeting window, click the **Rooms** button, select a meeting room from the address book, click the **Rooms** button, and click **OK**.

**Forward a Calendar Item:** Open a calendar item, click the **Forward** button on the Meeting tab, enter a contact in the To: field, then click **Send**.

**Send Calendar Information:** Click and drag a meeting or an appointment and drop it on the Mail Navigation Bar option. In the message window that opens, add a recipient in the To field and click the **Send** button.

**Access a Shared Calendar:** Expand the Manage Calendars group. Click the **Add Calendar** button, select **Open Shared Calendar**, enter another user's name (or click **Name** and select a user from the address book), then click **OK**.

**Send a Calendar Sharing Invitation:** Expand the Manage Calendars group. Click the **Share Calendar** button and select the calendar you want to share from the list. To share the calendar, click the **Add** button, select a contact, and click **OK**.

**Send your Calendar in an Email:** Click the **Email Calendar** button on the Home tab, select a calendar and date range, and click **OK**.

**Add New Calendars:** Expand the Manage Calendars group. Click the **Add Calendar** button and select **Create New Blank Calendar**, give the calendar a name, and click **OK**.

**View Multiple Calendars:** Check or uncheck a calendar's check box in the Folder pane to toggle it on and off.

**Overlay Calendars:** While viewing multiple calendars, click the **Overlay** arrow on a calendar tab.

**Delete a Calendar:** Right-click a calendar tab (or a calendar in the Folder pane) and select **Delete Calendar**.

**Configure Calendar Settings:** Click the **File** tab and select **Options** at the left. In the Outlook Options dialog box that appears, select **Calendar**. Customize the calendar settings and click **OK**.

### Tasks and Notes

**Flag a Message:** In Mail view, select an item, click the **Follow Up** button on the Home tab, then select a flag; or, right-click a message, select **Follow Up**, and select a flag.

**Change a Flag:** In Mail view, select a flagged item, click the **Follow Up** button on the Home tab, then select a new flag.

**Add a Reminder:** In Mail view, select an item, click the **Follow Up** button on the Home tab, and select **Add Reminder**. Choose a date, time, and sound in the Reminder section of the Custom dialog box, then click **OK**.

**Remove a Flag:** In Mail view, select a flagged item, click the **Follow Up** button on the Home tab, and select **Clear Flag**.

**Add a Task:** Switch to Task view by clicking **Tasks** on the Navigation bar, then click the **New Task** button on the Home tab (or click the **New Items** button on the Home tab, then select **New Task**). Enter a subject, start date, due date, and other options, then click **Save & Close**.

**Mark a Task Complete:** In Task view, check a task's check box; or, select a task and click the **Mark Complete** button on the Home tab.

**View Tasks in the To-Do Bar:** Click the **View** tab on the ribbon, click the **To-Do Bar** button, and select **Tasks**.

**Change Task Views:** In Task view, click the **Change View** button on the Home tab (or, if available, select a view from the Views gallery).

**Create a Recurring Task:** When creating a new task, click the **Recurrence** button on the Task tab. Specify a recurrence pattern, then set the recurrence pattern's date range. Click **OK**.

- **Daily** tasks recur every day, every set number of days, or every weekday.
- **Weekly** tasks recur on the same day of the week every week, or every certain number of weeks.
- **Monthly** tasks recur on the same day of the month (the 10<sup>th</sup>), or the same day of a specified week of the month (the third Friday).
- **Yearly** tasks recur annually on the same day of a month every year (July 8<sup>th</sup>), or the same weekday in a specified week and month (the second Tuesday of April).

**Remove Recurrence:** After opening a task with recurrence, click the **Recurrence** button on the Task tab and click **Remove Recurrence**.

## Tasks and Notes

**Assign a Task:** When creating a task, click the **Assign Task** button on the Task tab. Enter an email address in the To: field, then click **Send**.

**Accept or Decline an Assigned Task:** Select a task assignment request in your Mail inbox, then click either **Accept** or **Decline** in the message preview. Choose whether to edit the message response or not, and click **OK**.

**View Notes:** Click the **More (...)** button in the Navigation bar and select **Notes**. Double-click a note to open it.

**Create a Note:** While in Notes view, click the **New Note** button on the Home tab. Start typing within the note window, then click outside the note window to save it.

## Advanced Mail

**Run a Quick Step:** Click a Quick Step in the Quick Steps gallery, or click the **More** button and select a Quick Step.

**Add a New Quick Step:** Click the **More** button in the Quick Steps gallery, then select **Create New**. Give the new Quick Step a name, then customize the actions that the Quick Step will take. Click **Finish**.

**Edit a Quick Step:** Click the **More** button in the Quick Steps gallery, then select **Manage Quick Steps**. Select a Quick Step, then click **Edit**. Update the Quick Step's actions, then click **Save**.

**Create a Quick Part:** Select the text or graphics you want to use as a Quick Part, click the **Insert** tab, click the **Quick Parts** button, and select **Save Selection to Quick Parts Gallery**. Give the Quick Part a name, category, and description, then click **OK**.

**Use a Quick Part:** While composing a message, click the **Insert** tab, click the **Quick Parts** button, and select a Quick Part.

**Redirect Replies:** While composing a message, click the **Options** tab, and click the **Direct Replies To** button. Click **Select Names**, select names from the address book, and click **OK**. Click **Close**.

**Recall a Message:** Click the **Sent Items** folder in the Folder pane, open a message, click the **Actions** button on the Message tab, and select **Recall this Message**. Select whether to just delete the message or to replace it with a new message, then click **OK**.

**Send a Poll:** In a new message window, click the **Options** tab, click the **Use Voting Options** button, and select a poll option (or select **Custom**, specify your own poll options, then click **Close**).

**Track Votes:** Click the **Sent Items** folder, open a message with a poll, and click the **Tracking** button on the Message tab.

## Advanced Mail

**Create a Rule Based on an Email:** Select a message, click the **Rules** button on the Home tab, and select **Create Rule**. Select the conditions for the rule, then select the actions for the rule to carry out. Click **OK**.

**Create a Rule from Scratch:** Click the **Rules** button on the Home tab and select **Manage Rules & Alerts**. Click **New Rule** and use the Rules Wizard to set conditions, actions, and exceptions. Give the rule a name, select how you want it to run, and click **Finish**.

**Edit a Rule:** Click the **Rules** button on the Home tab and select **Manage Rules & Alerts**. Select a rule, click **Change Rule**, and select **Edit Rule Settings**. Use the Rules Wizard to edit the rule's conditions, actions, and exceptions, then click **Finish**.

**Delete a Rule:** Click the **Rules** button on the Home tab, select **Manage Rules & Alerts**, select a rule, click **Delete**, and click **Yes**.

**Save an Email in Another Format:** Double-click an email to open it, then click the **File** tab and select **Save As**. Select where you want to save the email, then click the **Save as type** list arrow and select a file type. Click **Save**.

**Delegate Mail Folders:** Click the **File** tab, click **Account Settings**, and select **Delegate Access**. Click **Add**, select a contact from the address book, click **Add**, then click **OK**. Select the permissions for the delegated user, then click **OK**. Click **OK** again.

- **Reviewer** permissions allow the user to read items and files, but not create or edit them.
- **Author** permissions allow the user to create and read items and files, and to modify and delete items they've created.
- **Editor** permissions allow the user to create, read, modify, and delete all items and files.

**Access a Shared Folder:** Click the **File** tab, click **Open & Export**, click **Other User's Folder**, enter another user's name (or click **Name** and select a user), then click **OK**.

**Create an Email Using a Theme or Stationery:** Click the **New Items** button on the Home tab, select **Email Message Using**, and select **More Stationery**. Select a theme or stationery in the dialog box, then click **OK**.

**Add Additional Accounts:** Click the **File** tab and click the **Add Account** button. Fill in the account information and click **Connect**. Click **Done**.

**Specify Which Account Email is Sent From:** While composing an email, click the **From** field list arrow and select an email account.

## Manage Information

**Categorize an Item:** Select an item, click the **Categorize** button on the Home tab, and select a category.

## Manage Information

**Edit a Category:** Click the **Categorize** button on the Home tab, select **All Categories**, and select a category. Click **Rename**, give the category a new name, and click **OK**. Click the **Color** list arrow and select a new color. Click **OK**.

**Create a New Category:** Click the **Categorize** button on the Home tab, select **All Categories**, and click **New**. Enter a name, select a color, and click **OK**.

**Delete a Category:** Click the **Categorize** button on the Home tab, select **All Categories**, select a category, click **Delete**, and click **OK**.

**Sort Inbox by Category:** Click the **sort by** list arrow above the Inbox and select **Categories**.

**Create a Folder:** Click the Folder tab, click the **New Folder** button, enter a name, select a type of content, select a location, and click **OK**.

**Rename a Folder:** Select a folder in the Folder pane, click the **Folder** tab, and click the **Rename Folder** button. Enter a new folder name and press **Enter**.

**Move a Folder:** Select a folder in the Folder pane, click the **Folder** tab, and click the **Move Folder** button. Select a new location, then click **OK**.

**Delete a Folder:** Select a folder in the Folder pane, click the **Folder** tab, and click the **Delete Folder** button. Click **Yes** to confirm.

**Create a Search Folder:** Click the **Folder** tab and click the **New Search Folder** button. Select **Create a Custom Search Folder**, click **Choose**, and select criteria for the search folder. Click **OK** in the three open dialog boxes.

**Clean Up a Conversation:** Select a conversation in the Inbox, click the **Clean Up** button on the Home tab, select **Clean Up Conversation**, then click **Clean Up**.

**Clean Up a Folder:** Select a folder, click the **Clean Up** button on the Home tab, select **Clean Up Folder**, then click **Clean Up Folder**.

**Export Outlook Data:** Click the **File** tab, click **Open & Export**, and click **Import/Export**. Select **Export to a file** and click **Next**. Select a file type and click **Next**. Select a folder to export data from and click **Next**. Specify where you want to save the exported file, and how you'd like to deal with duplicate items, and click **Finish**. Add an optional password and click **OK**.

**Import Data into Outlook:** Click the **File** tab, click **Open & Export**, and click **Import/Export**. Select **Import from another program or file** and click **Next**. Select a file type to import and click **Next**. Click **Browse** and specify a file, choose how to handle duplicate items, and click **Next**. If necessary, select a folder from the file to import, and click **Finish**.



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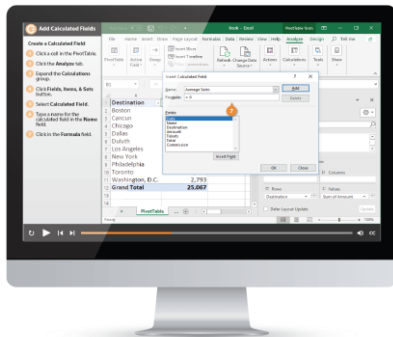
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