HSCLink
Communicate Collaborate Connect

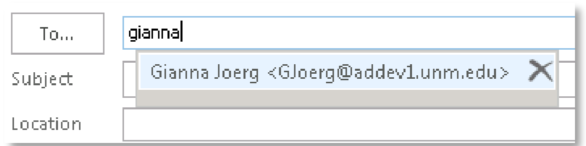
Outlook 2013

07/17/2014

Schedule a Meeting

Meeting requests are used for multiple attendees.

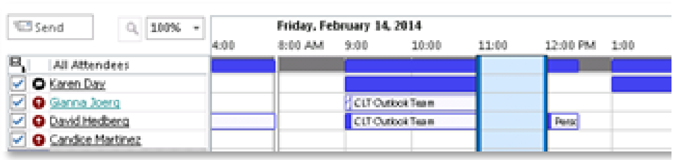
1. Click the **date/time** on the calendar for the meeting. If needed, the date/time can be changed later.
2. Click **Home tab** if needed and then **New Meeting**.
3. In the **To: field**, type the first name of an attendee. Repeat and as each name is recognized, press **Enter**.



4. Complete the **Subject** and **Location** fields as needed.
5. Change the **End Time** as needed.
6. Click **Send**.

Check Attendee Availability for a Meeting

1. Click **Home tab** and then **New Meeting**.
2. In the **To: field**, type the names of the attendees.
3. Click **Scheduling Assistant** on the ribbon.
4. Click new date/time to move meeting. Drag an edge to increase/decrease time.



5. Complete the **Subject** and **Location** fields as needed.
6. Click **Send**.

Edit a Meeting

1. Double-click the **meeting** to open.
   a. If it is a recurring appointment or meeting, choose **Just This One** or **The Entire Series**.
2. Change details as needed.
3. Click **Send Update** to notify attendees.

Respond to a Meeting Request

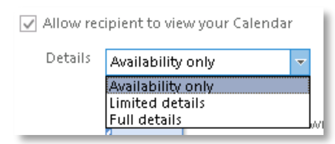
1. Double-click the **request**.
2. Click **Accept**, **Tentative**, or **Decline** on the ribbon. If accepted, the meeting will be added to your calendar.

Create a Recurring Appointment or Meeting

1. Click **Home tab** and then **New Appointment** or **Meeting**.
2. Complete the **Subject** and **Location** fields as needed.
3. Click **Recurrence** on the ribbon.
4. Complete needed fields and then click **OK**.
5. Click **Save & Close** or **Send** if it is a group meeting.

Share a Calendar

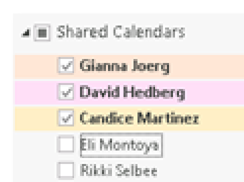
1. Open your calendar.
2. Click **Share Calendar** on the ribbon.
   A new message window opens.
3. Type recipient's **name**:
   a. If last name typed, click **Check Names** on ribbon and choose recipient.
   b. If first name typed and the system provides correct option, press **Enter**.
4. Choose an **access level** from the Details list.



5. Click **Send**.
6. Click **Yes** to confirm sharing a read-only view.

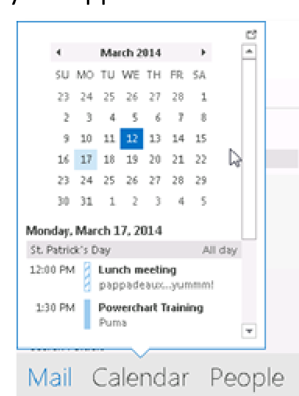
View a Shared Calendar

1. Open **your calendar** and then click **Open Calendar** on the ribbon.
2. Choose **Open Shared Calendar**
3. Enter a first and last **name** and press **Enter**.
   The calendar appears on the right.
   Note: Check/uncheck name check boxes to display and hide calendars.



Calendar Peek

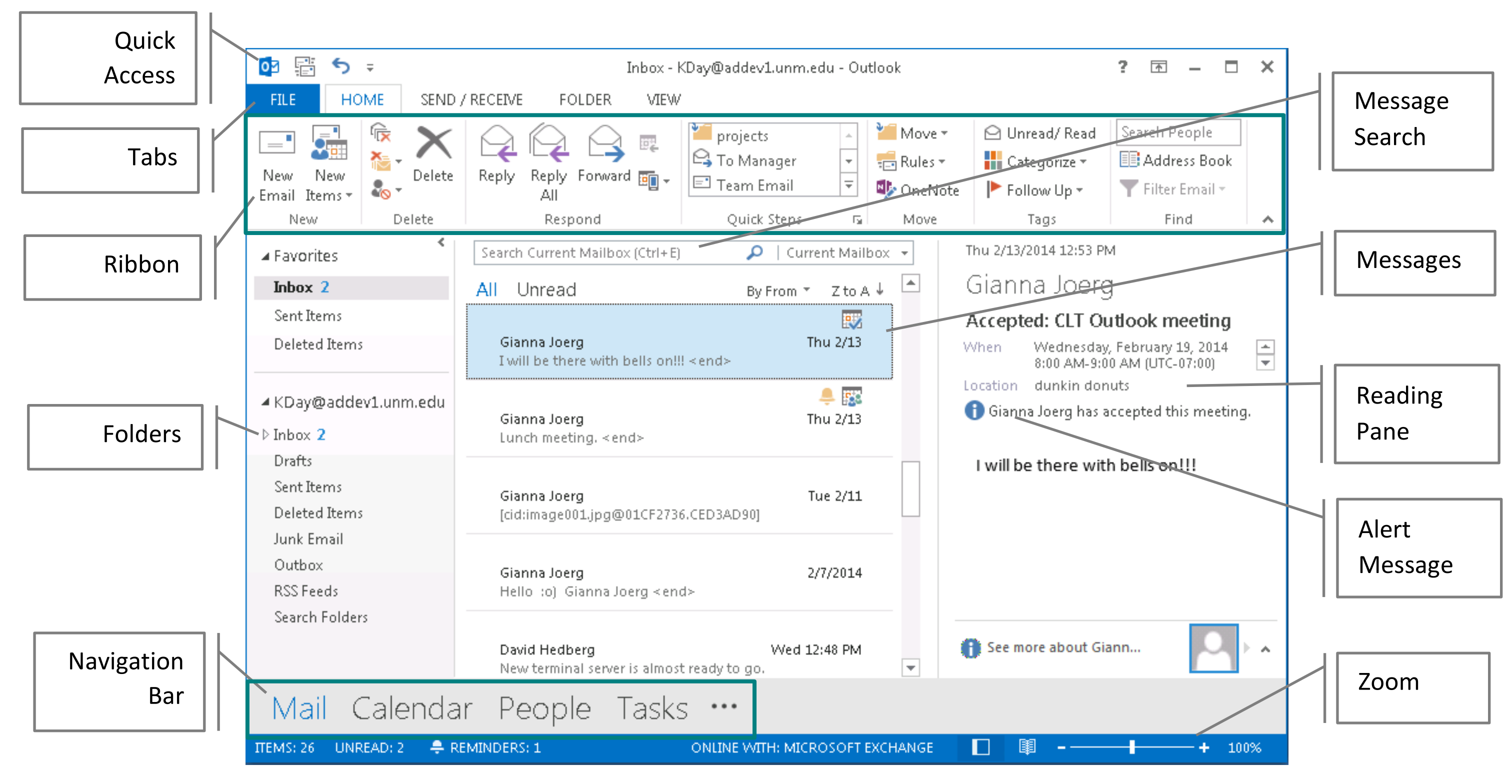
Hover over Calendar on the Navigation Pane to view the next several days of appointments.



More Resources

- HSCLink webpage for tipsheets and information: http://hsc.unm.edu/email/
- Lynda.com for online training http://lynda.unm.edu/
  Login using your UNMNetID

Provided by: UNM Hospitals Computer Learning Technologies



The Ribbon

The ribbon contains a series of tabs and commands grouped by function. The ribbon tabs and commands change for Messages, Calendar, People and Tasks.

Restore/Minimize Ribbon

To minimize or restore the ribbon, press **CTRL + F1**.

The Navigation Bar

Navigate between Mail, Calendar and People views.

Sort Messages

- Click **column heading** such as date, click again to reverse the order.
- Alternatively, click **VIEW tab** and choose a sort method in the **Arrangement** group.

Filter Read/Unread Messages

- To view unread messages only, from the HOME tab, click **UNREAD** at the top of the message list.
- To view all messages, both read/unread, click **All**.

Search for Message

1. Open Inbox or folder to be searched.
2. Type **search word** into Search field and then press **Enter**. As an alternative, click Magnifying glass. To clear search, click the **X** in the search box.

Turn On/Off Email Alert

Set this option to be alerted when an email arrives. Alert displays at the bottom right of your screen.

1. Click **File**, then **Options**, then **Mail**.
2. Under Message arrival, click **Display a Desktop Alert** check\uncheck box.
3. And then click **OK**.

Read Message

- Double-click to open, press **ESC key** to close.
- Reading Pane Option:
  - Click **View** on the ribbon and then **Reading Pane**. Choose location, either Right or Bottom
  - Watch for Alert Messages in the email:

  Vote by clicking Vote in the Respond group above.

View Message Attachment

- To fully open the attachment, double-click the **link**. When done viewing, close the attachment program (Word, PowerPoint, etc.) to return to Outlook.

Save Attachment

1. From within the message, click the attachment link and then click **Save As** on the ribbon.
2. Navigate to the location to which you want to save and then click **Save**.

Reply to Message:
1. From within an open message, click **Reply** (<Ctrl> + <R>) or **Reply All** (<Alt> + <L>).
2. Complete the message and then click **Send**.

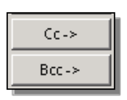
Forward a Message:
1. From within an open message click **Forward**.
2. Complete the message and then click **Send**.

Delete Message(s):
- Click the message and then press the **Delete** key.
- To delete multiple messages, press **Ctrl** and then click each message to be deleted. Finally, press the **Delete** key.

Send Message
1. Click **Home** Tab.
2. Click **New Email.** (<Ctrl> + <N>)
3. Type **first or last name** in the To… field.
4. Click **Check Names** on the ribbon.
5. Double-click the desired **name.**

   If needed, use Address Book:

   a. Click **Address Book**. (<Shift> + <Ctrl> + <B>)
   b. Type **first name** is Search field.
      System automatically searches.
   c. Double-click the **name**.
      Name(s) are added to the To… field.
      Note: Highlight the name and click CC or BCC to add names to those fields.



      Note: To remove a name, click the name and then press **Delete** key.
   d. Click **OK**.
6. Type a **Subject** and a **Message** in the body.
7. Click **Send**.

Send Message with High Importance
From within a new email, click **High Importance** on the ribbon.

Request a Read Receipt
1. From within a new email, click **Options** Tab.
2. Then click **Request a Read Receipt** check box.

Set Reply Request
1. From within a new message, click **Follow Up** on the ribbon.
2. Click **Add Reminder**.
3. Click **Flag for Recipients** check box.
4. Click **Reminder** check box and choose a **date/time**.
5. Click **OK**.

Recall or Resend Message(s):
1. From within the Sent Items folder, double click to open the message in a new window.
2. Click **Actions** in the Move section.
3. Click **Recall this message** or **Resend**.

Creating a Distribution List
1. Click **Home** tab.
2. Click **New Items**.
3. Click **More Items** and then click **Contact Group.**
4. Type **group name** in the Name box.
5. Click **Add Members**, choose **From Address Book**
6. Type first **name** in Search box.
   Note: System will automatically search.
7. Double-click each name you wish to add.
8. Click **OK** when done adding all names.
9. Click **Save** & **Close**. (<Ctrl> + <S>)

Create Folders
1. Right-click on **Inbox.**
2. Click **New Folder**.
3. Type folder **name** and then press the **Enter** key .

Edit Folder Name
1. Right-click folder **name**.
2. Click **Rename Folder.**
3. Type new **name** and press the **Enter** key.

Removing Folders
1. Right-click folder **name**.
2. Click **Delete Folder**.
3. Click **Yes**.

Moving or Copying Messages into Folders
Click and drag message into desired folder.

Create Signature
1. Click **File**.
2. Click **Options**.
3. Click **Mail** in the menu to the left.
4. Click **Signatures**.

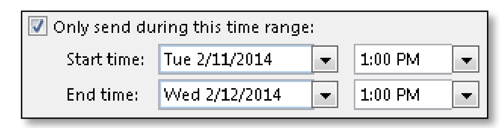
5. Click **New.**
6. Type a **name** for signature.
   Note: Multiple signatures may be used, so the name will serve as a way to identify them.
7. Click **OK.**
8. Type **signature** in the Edit Signature box.
   Note: To set signature defaults, choose signature options from "New Message" and/or "Replies/forwards" drop-downs.
9. Click **OK** when done.
   Note: Repeat steps 5—9 for additional signature(s),

Delete/Edit/Rename Signature
1. Click **File** then **Options**.
2. Click **Mail** in the menu to the left.
3. Click **Signatures**.

4. Select the signature **name**
5. Complete desire action:
   - Click **Delete** then click **Yes**.
   - Edit text in the Edit Signature box then click **OK**.
   - Click **Rename, e**dit name and then click **OK**.

Using Out of Office Assistant
1. Click **File**.
2. Click **Info**.
3. Click **Automatic Replies.**
4. Click **Send Automatic Replies** radio button.

5. Click **Only send during this time range** check box.
6. Enter **Start** and **End** date and times.



7. Type your reply message under the Inside My Organization tab.
   Note: This reply will only go to internal users.
8. Type your reply message under the Outside My Organization tab.
   Note: This reply will only go to external users.
9. Click **OK** when done.

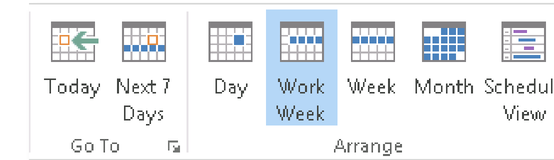
Turning off the Out Of Office Assistant
From within your Inbox, click **Turn off .**

Create Rule
1. From within your inbox, click **Rules** on the ribbon, then **Manage Rules and Alert**s.
2. Click **New Rule**.
3. Choose a **template** from the top pane.
4. Then choose **rule specifics** in the lower pane by clicking the underlined value. Then click **Next>.**
5. Choose additional **Conditions** if needed and click **Next>**.
6. Choose **Exceptions** if needed and click **Next>.**
7. Type rule **name** if needed and click **Finish**.
8. Click **OK**.

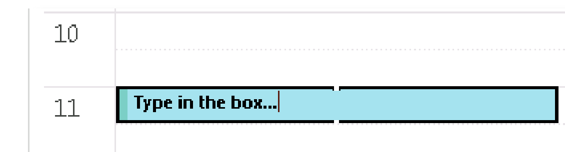
View the Calendar
Click **Calendar** on the navigation bar (bottom left).

Set Calendar Options
1. Click **File**, **Options** and then **Calendar**.
2. Set options as needed and then click **OK**.

Calendar Viewing Options
Click **HOME tab** on the ribbon and then choose a view:



Quick Enter an Appointment
Use to enter appointments for yourself only.
1. On the calendar, click the **date/time** for the appointment.



2. Type an appointment **Subject**.
3. Press **Enter** on your keyboard.
   Grab the bottom of the appointment and drag down to extend the time. Click and drag appointments to different date/times.

Schedule a Detailed Appointment
1. Double-click on the calendar the **date/time** for the appointment.
2. Complete the **Subject** and **Location** fields as needed.
3. Change the **Date** and/or **Start/End Times** as needed.
4. Enter additional details into the text area.
5. Click **Save & Close**.

Mark Appointment/Meeting Private
1. Right-click any **appointment** or **meeting**.
2. Click **Private**.