

# Microsoft® Office 2013

First Course

Second Course

Third Course

Outlook 2013  
**UNIT B**

## Managing Information Using Outlook





# Objectives

- Describe Outlook
- Organize email
- Manage your contacts
- Manage your calendar



# Objectives

- Manage tasks
- Create notes
- Integrate social connectors
- Apply categories



# Describe Outlook

- The Outlook screen is fully customizable to let you personalize how you view and get to the information about the people you interact with, your appointments and schedule, or mail, with different levels of detail

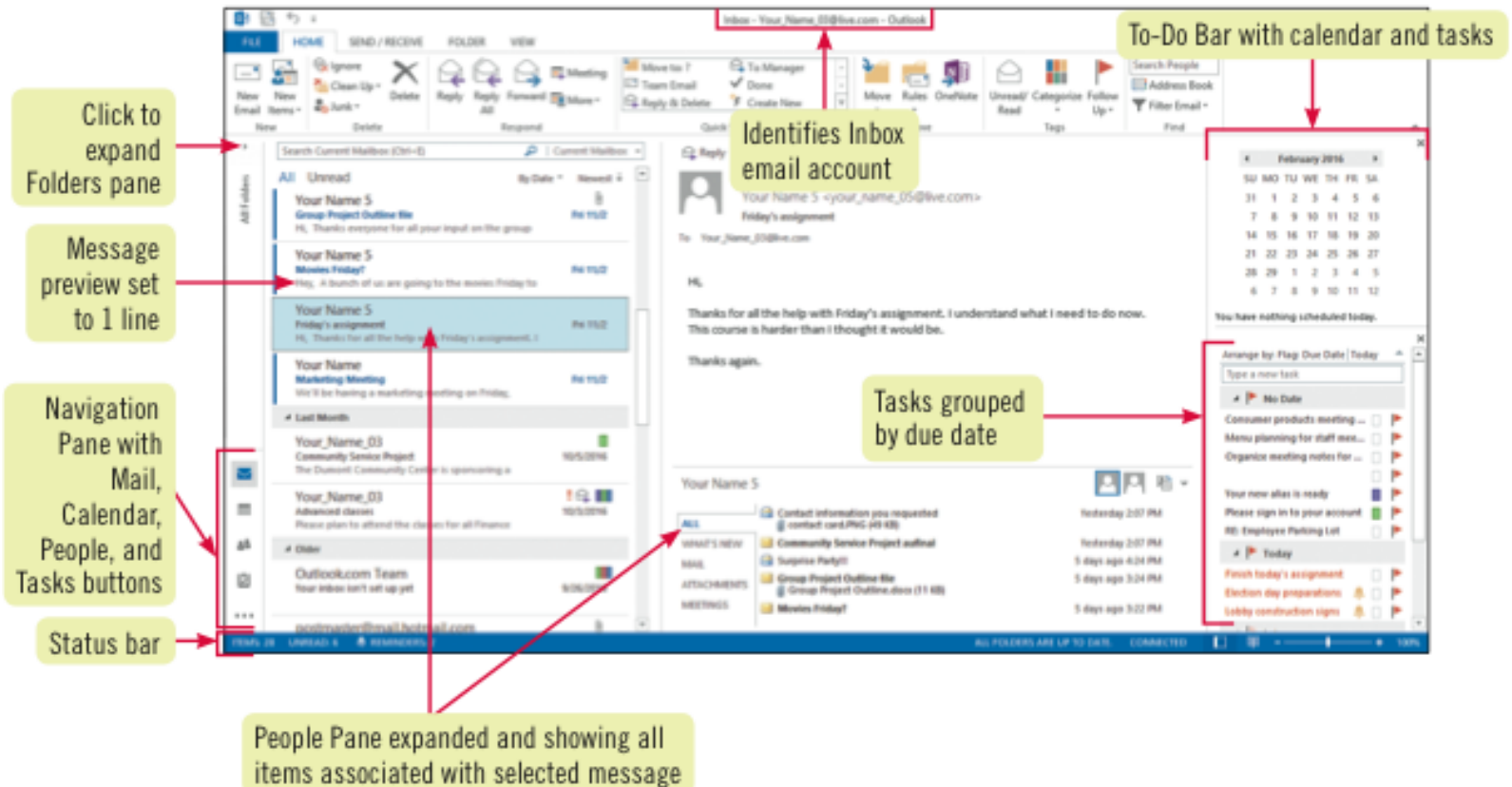


# Describe Outlook

- Outlook will prompt you to set up a personal account
  - An **account** is a set of information that identifies you as a user
  - Accounts allow more than one user to have individual e-mail accounts on the same computer
  - Each user will create a username and password to login

# Describe Outlook

## People Pane and To-Do Bar open





# Organize E-Mail

- Use Outlook as your e-mail program
  - Organize your mail and **sort** by conversation, view, or folder
  - The People module: where you store your email addresses as contacts
  - The Inbox: where all new mail arrives
  - The Calendar: schedules appointments and meeting requests
  - A **rule**: An action you create to have Outlook handle messages in a certain way

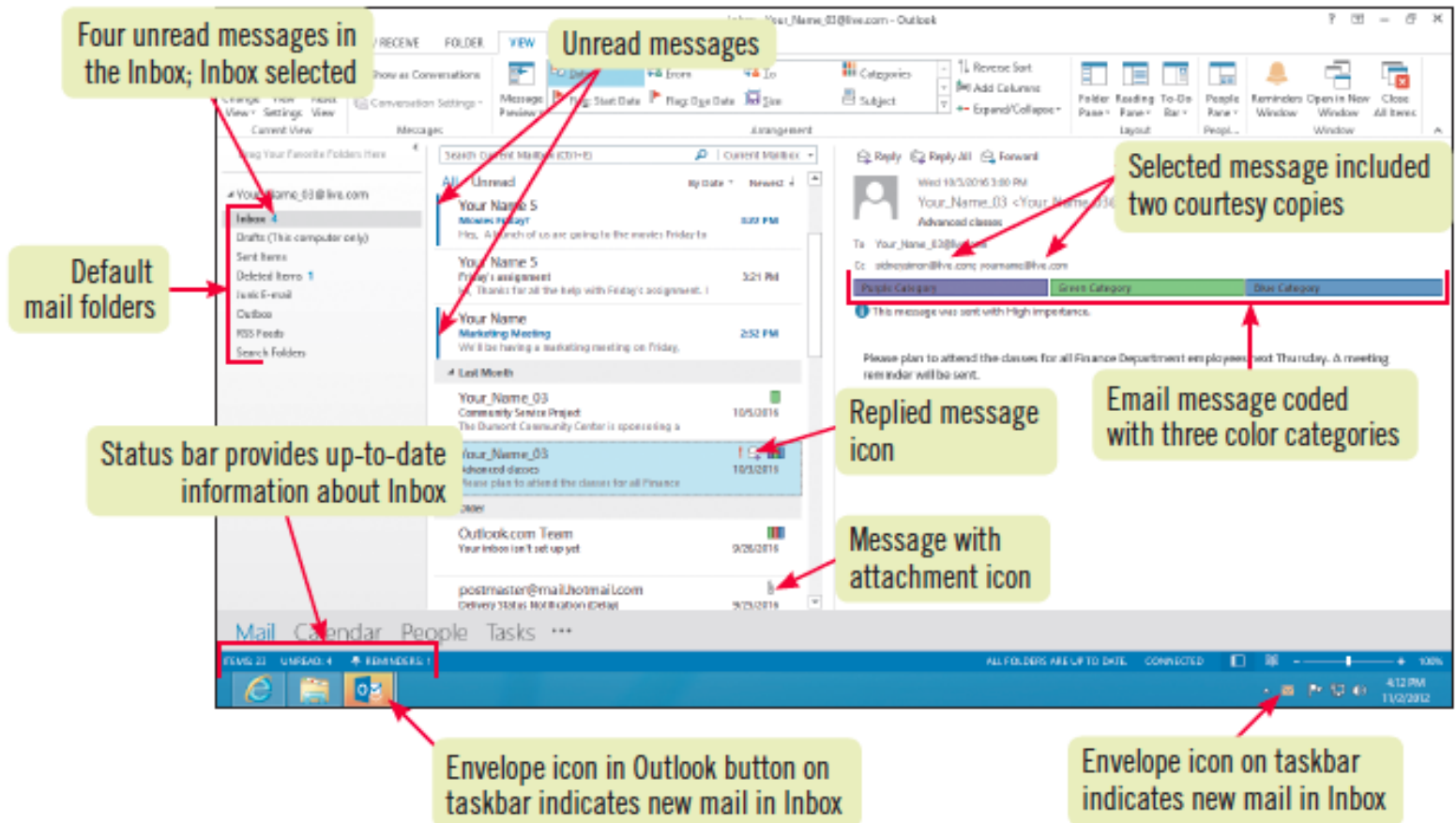


# Organize E-Mail

- **Threaded Message:** includes all e-mail that discuss a common subject
- **Manage Rules and Alerts button:** allows you specify how you want mail to sort when it arrives



# Organize E-Mail



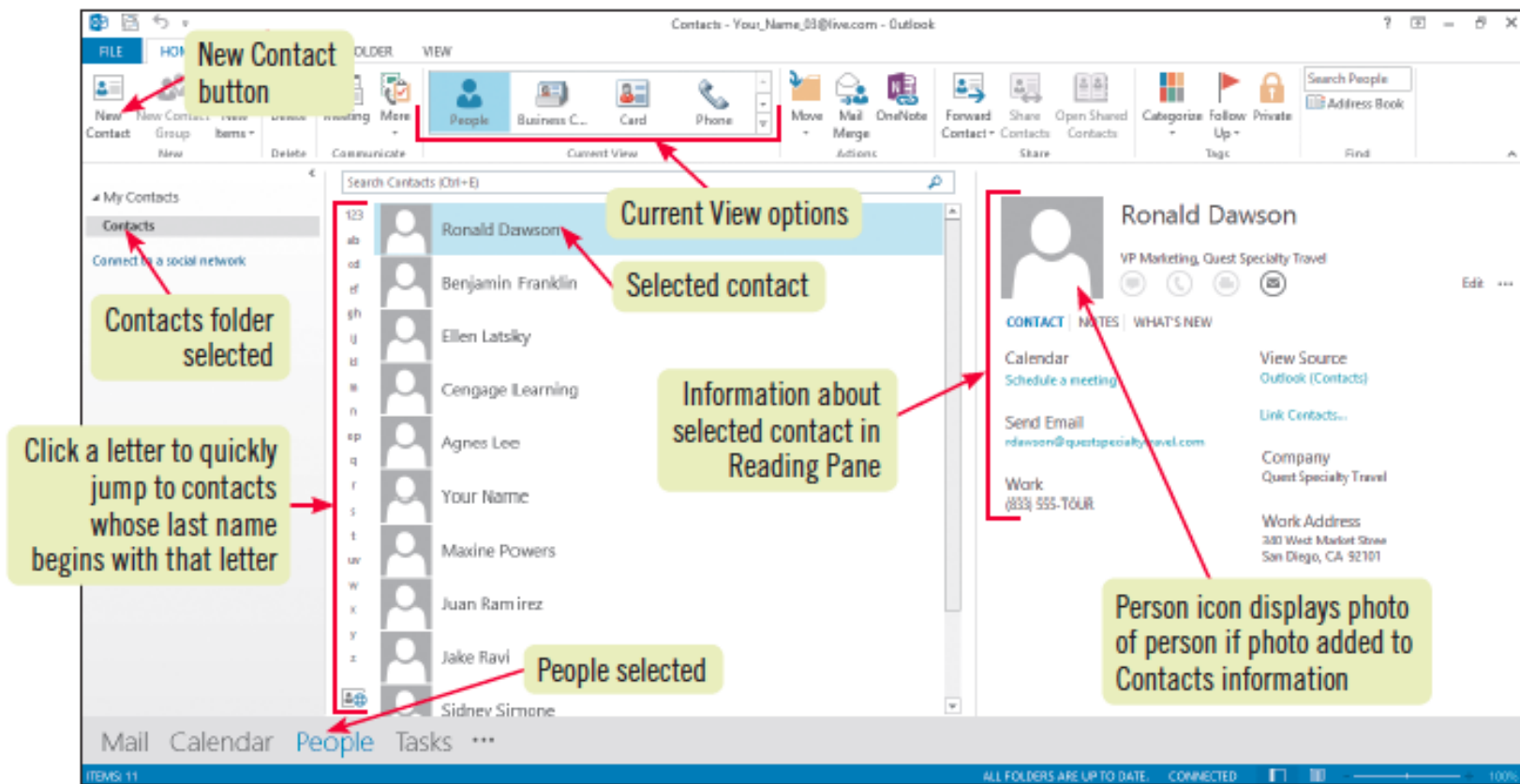


# Manage Your Contacts

- The People module lets you manage all business and personal contact info
  - **People view** shows several contacts in the Contacts folder
  - **Field** is an area that stores one piece of information

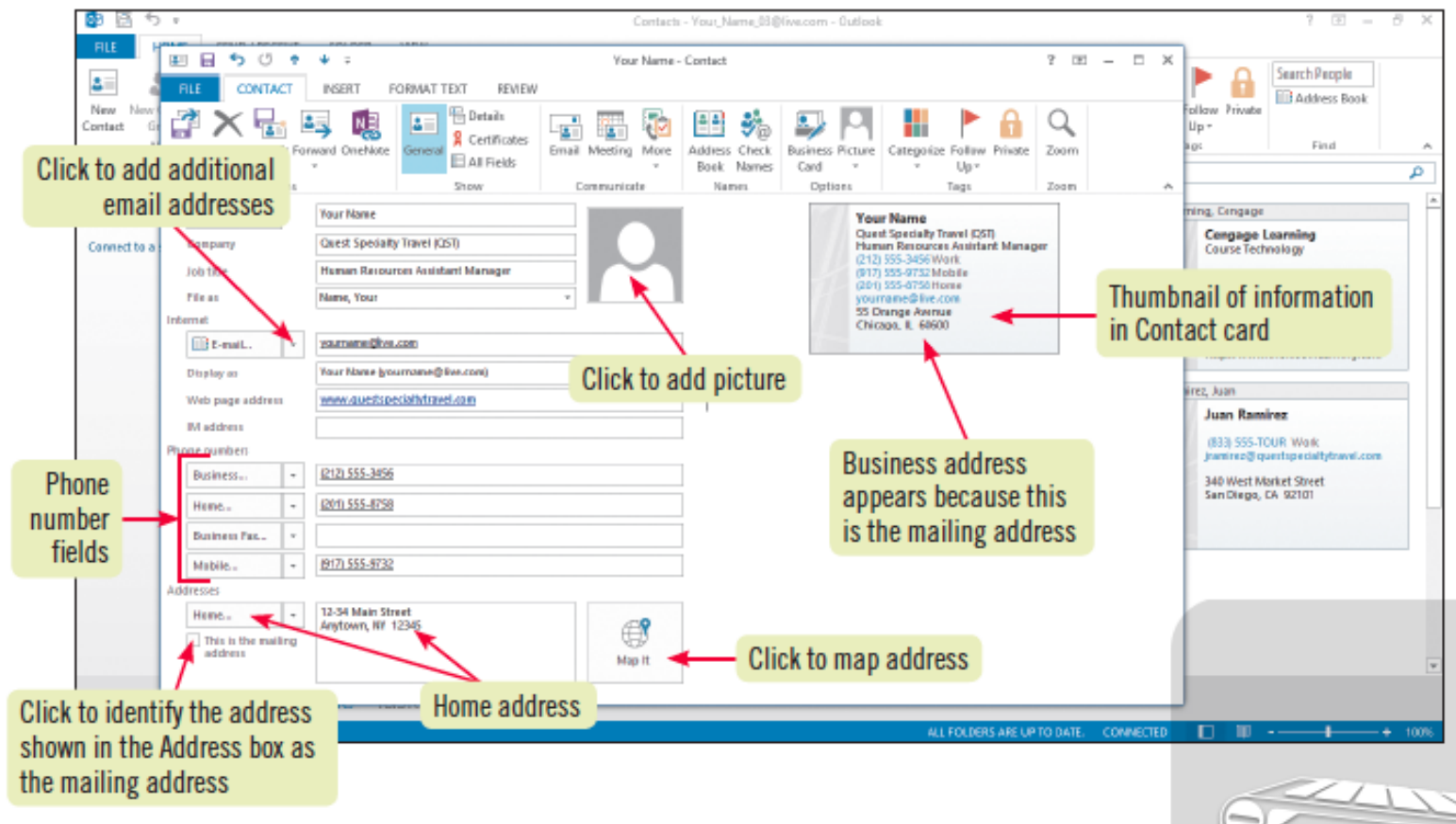
# Manage Your Contacts

## Contacts in People module



# Manage Your Contacts

## Completed new Contact card





# Manage Your Calendar

- The **Calendar module**: electronic equivalent of your desk or pocket calendar
  - **Appointment**: an activity that does not involve inviting other people or scheduling resources
  - **Meeting**: an activity you invite people to or reserve resources for
  - **Event**: an activity that lasts 24 hours or longer
  - Specify the subject of any activity and its start and end times
  - Set reminders to alert you of activities
  - Outlook identifies conflicts in scheduled activities



# Manage Your Calendar

## Calendar for a month

The screenshot shows the Microsoft Office 2013 Calendar application window. The interface includes a ribbon with tabs like FILE, HOME, SEND/RECEIVE, FOLDER, and VIEW. The CALENDAR TOOLS ribbon is active, showing the APPOINTMENT tab. The main area displays a calendar for September 2016, with a date navigator on the left for August and September. A weather widget at the top right shows the current city (New York, NY) and weather for today, tomorrow, and Sunday. A pop-up window for a 'Medical benefits meeting' is open, showing details like start/end times, location, and recurrence. A recurrence icon is visible on the calendar grid. A color category code is applied to the meeting. A note at the bottom right indicates that users can type directly into the calendar to create a new appointment, then use the ribbon to enter information for new appointments. The bottom status bar shows 'ITEMS 12', 'REMINDERS 1', and 'ALL FOLDERS ARE UP TO DATE'.

**CALENDAR TOOLS APPOINTMENT tab**

**Weather for current city**

**Click Month or arrows in the Date Navigator to go forward or back in the calendar**

**Forward button**

**Peek for details**

**Recurrence icon**

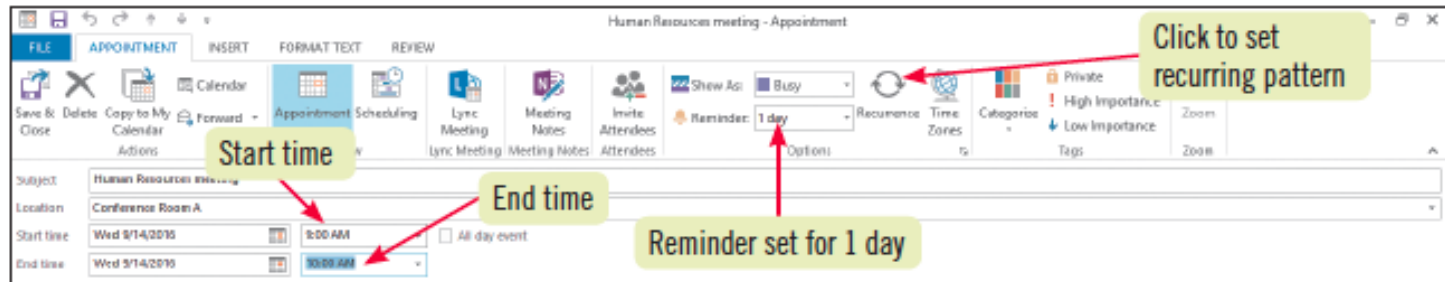
**Color category codes applied**

**Recurring meeting**

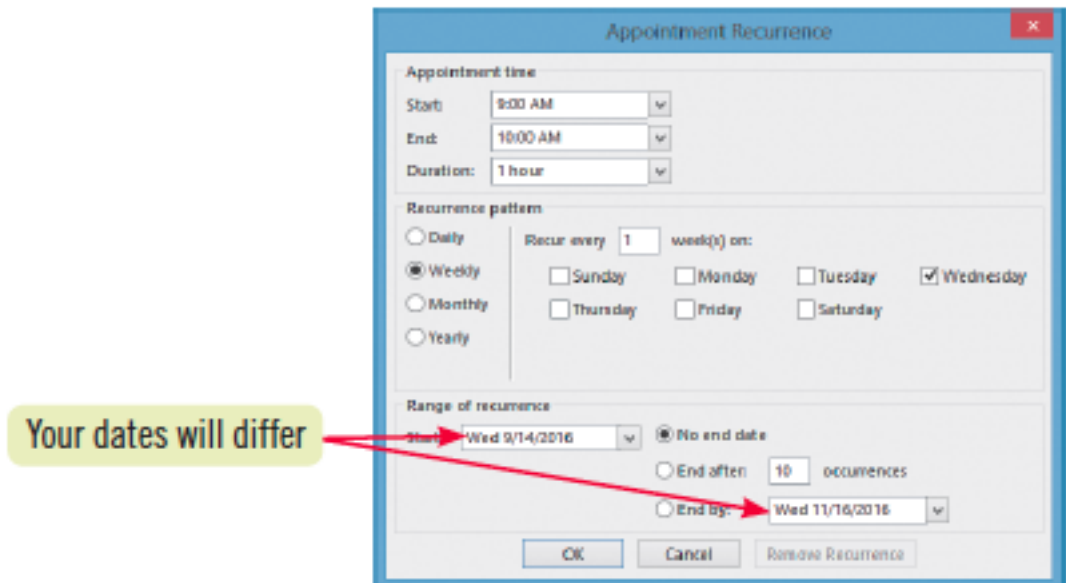
**Type directly into the calendar to create a new appointment, then use the Ribbon to enter information for new appointment**

# Manage Your Calendar

## New Appointment window



## Appointment Recurrence dialog box





# Manage Tasks

- **Tasks** are an electronic to-do list
  - Set start and due dates with descriptions
  - Assign priorities
  - Create status summary reports
  - Set reminders
  - Set tasks to recur



# Manage Tasks

## Task information entered

The screenshot displays the 'Task' pane in Microsoft Office 2013. The title bar reads 'Lobby construction permit - Task'. The ribbon includes 'FILE', 'TASK', 'INSERT', 'FORMAT TEXT', and 'REVIEW'. The 'TASK' ribbon has groups for 'Actions' (Save & Close, Delete, Forward, OneNote), 'Show' (Task, Details), 'Manage Task' (Mark Complete, Assign Task, Send Status Report), 'Recurrence' (Recurrence), 'Categorize' (Categorize), 'Follow Up' (Follow Up), and 'Tags' (Private, High Importance, Low Importance). The task details section shows: 'Follow up. Start by Thursday, September 15, 2016. Due by Thursday, September 15, 2016.' The 'Subject' field contains 'Lobby construction permit'. The 'Start date' is 'Thu 9/15/2016', 'Due date' is 'Thu 9/15/2016', and 'Reminder' is 'Thu 9/8/2016'. The 'Status' is 'Not Started', 'Priority' is 'High', and '% Complete' is '0%'. The 'Owner' is 'Your\_Name\_03'. Red arrows point from yellow callout boxes to specific elements: 'Task title based on task subject' points to the title bar; 'Priority set to High Importance' points to the 'High Importance' tag; 'Reminder active' points to the 'Reminder' checkbox; 'Follow up set' points to the 'Follow up' section; and 'Task subject' points to the 'Subject' field.

Task title based on task subject

Priority set to High Importance

Reminder active

Follow up set

Task subject

# Manage Tasks

## Tasks in To-Do List view

**Tasks arranged by due date**

**Click to enter a new task**

**Selected task appears in the Reading Pane**

**Your heading may read Next Month**

**Peek for this task**

**Task icons give information about each task**

Start Date: Thu 9/15/2016  
Reminder Time: Thu 9/8/2016 8:00 AM  
Due Date: Thu 9/15/2016  
In Folder: Tasks  
Categories:

From: Your\_Name\_03 (mailto:Your\_Name\_03@live.com)  
Sent: Monday, September 24, 2016 3:56 PM  
To: sidneysimon@live.com  
Cc: Your\_Name\_03@live.com  
Subject: Employee Parking Lot

Please be sure to park in your designated parking spot. Thank you.

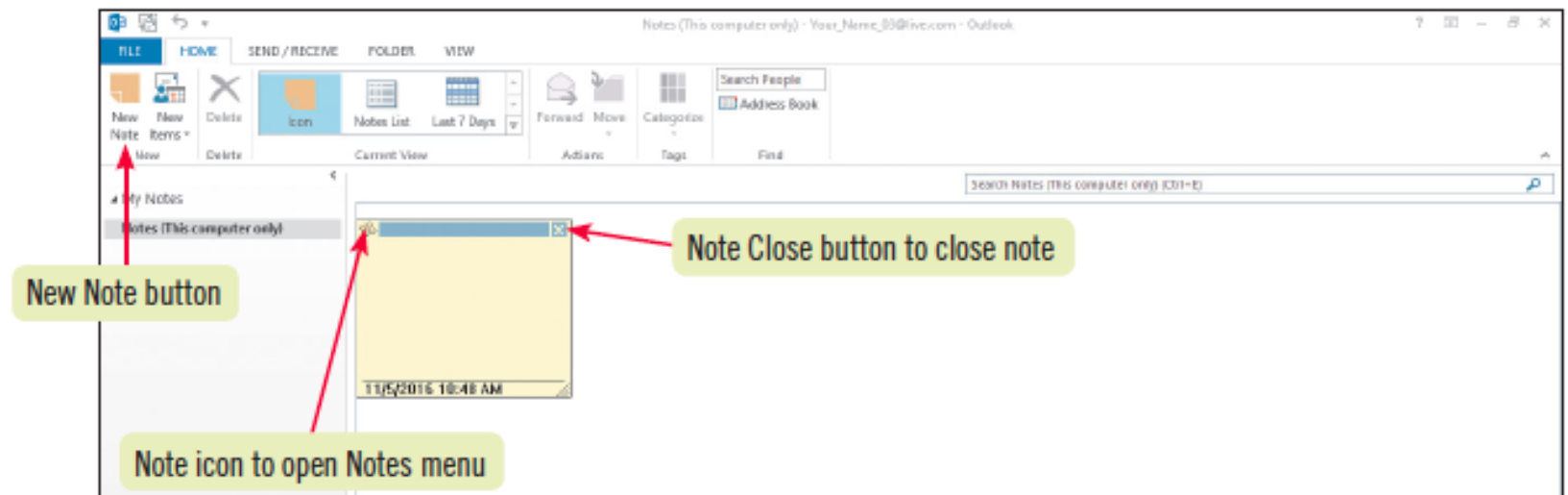


# Create Notes

- **Notes** are the electronic version of sticky notes
  - Assign categories, contacts, or colors
  - Forward notes to colleagues
  - Turn notes into meetings, appointments, or tasks

# Creating Notes

## New note





# Integrate Social Connectors

- Outlook can track and integrate your friends and colleagues through social media
  - Updates appear in Outlook

# Integrate Social Connectors

## Connecting through the People Pane

The screenshot displays the Microsoft Outlook 2013 interface. The left sidebar shows the 'People Pane' with a list of contacts. One contact, 'Your Name 5', is highlighted. A red arrow points from this contact to the 'Selected email' label. Another red arrow points from the 'People Pane' label to the contact list. A third red arrow points from the 'Selected email' label to the email content area. A fourth red arrow points from the 'Show All information for any people in selected email' label to the 'ALL' button in the 'Your Name 5' contact's profile pane. A fifth red arrow points from the 'If connected and if a picture is associated with the profile, then the profile picture will replace the icon' label to the profile picture in the contact's profile pane.

**Selected email**

**People Pane**

**If connected and if a picture is associated with the profile, then the profile picture will replace the icon**

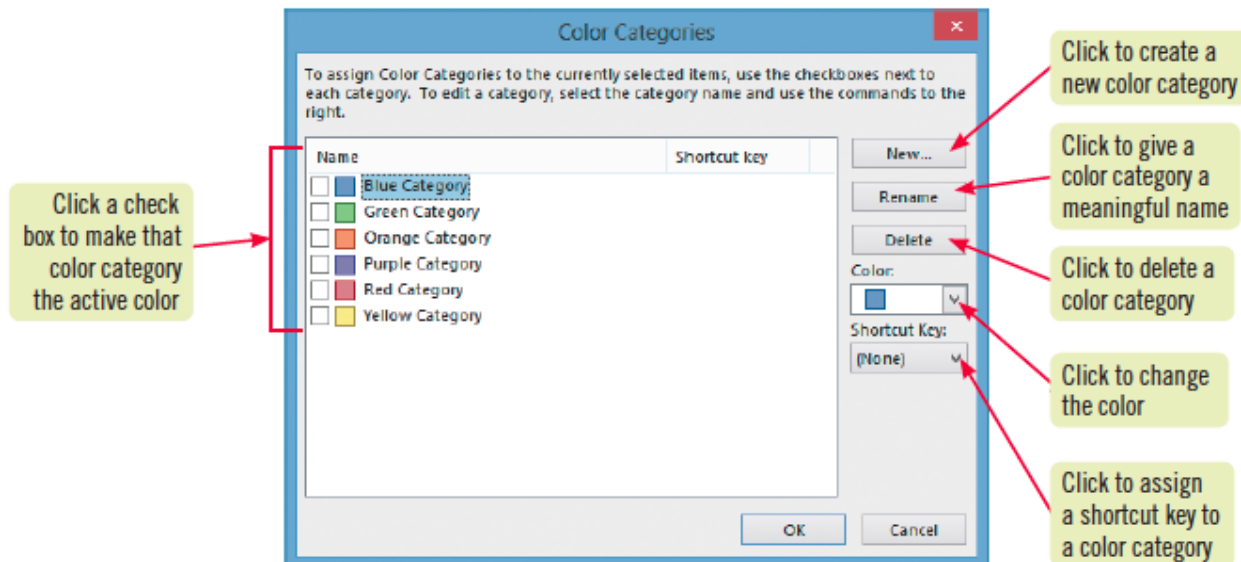
**Show All information for any people in selected email**



# Apply Categories

- A **category** tags items so you can organize them by specific criteria
  - Assign specific colors to contacts, tasks, appointments, notes
  - Filter or sort by category

Color Categories dialog box



# Apply Categories

## Contacts grouped by color category

Click to arrange by Categories

Contacts grouped by color categories (yours will differ)

	FULL NAME	JOB TITLE	COMPANY	FILE AS	COUNTRY/REGION	DEPARTMENT	BUSINESS PHONE	BUSINESS FAX	HOME PHONE	MOBILE
Click here to add a new...										
Categories: (none) 5 item(s)										
	Ronald Dawson	VP/Marketing	Guest Specialty T...	Dawson, Ronald	United States of Am...		(833) 555-TOUR			
	Agnes Lee			Lee, Agnes	United States of Am...				(212) 555-7657	(917) 555
	George Washington	President		Washington, George	United States of Am...		(202) 555-1212		(202) 555-3333	
	Maxine Powers	Human Reso...	Guest Specialty T...	Powers, Maxine	United States of Am...		(201) 555-3496		(212) 555-9628	(917) 555
	Ellen Latsky			Latsky, Ellen	United States of Am...		(833) 555-TOUR			
Categories: Blue Category: 1 item(s)										
	Jake Ravi	OnTheRoadAgal...		Ravi, Jake	United States of Am...		(516) 555-5378 x...			(917) 555
Categories: Green Category: 2 item(s)										
	Juan Ramirez			Ramirez, Juan	United States of Am...		(833) 555-TOUR			
	Your Name	Human Reso...	Guest Specialty T...	Name, Your	United States of Am...		(212) 555-3456		(201) 555-8758	(917) 555
Categories: Orange Category: 2 item(s)										
	Cengage Learning		Course Technolo...	Learning, Cengage	United States of Am...		+1 (800) 881-892...			
	Sidney Simone		Rio Travel	Simone, Sidney	United States of Am...				(817) 555-8876	
Categories: Red Category: 1 item(s)										
	Benjamin Franklin	Inventor	Kites Electric	Franklin, Benjamin	United States of Am...		(215) 555-7653		(215) 555-0000	

Mail Calendar People Tasks ...

ITEMS: 11 REMINDERS: 1 ALL FOLDERS ARE UP-TO-DATE. CONNECTED 100%





# Summary

- Describe Outlook
- Organize email
- Manage your contacts
- Manage your calendar



# Summary

- Manage tasks
- Create notes
- Integrate social connectors
- Apply categories