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Bill Dyszel



Outlook[®]
2013
FOR
DUMMIES[®]

by **Bill Dyszel**



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About the Author

Bill Dyszel is the author of 20 books, a regular contributor to national publications including *PC Magazine*, and a popular keynote speaker. Bill is also an award-winning filmmaker and an accomplished entertainer. He sang with the New York City Opera for 14 years and still appears regularly on the New York stage. He has produced scores of short films and currently ranks as the most prolific contributor to the 48-Hour Film Project, an international filmmaking competition. Many of his short, comedic films can be seen on YouTube.

About the Contributor

Michael Zulich is an IT professional with over 25 years of experience implementing, managing, and supporting high technology including Windows Server and MS Exchange. A former contributing editor to *Computer Shopper* and frequent technical editor to the *Outlook For Dummies* series, Mike is also the coauthor of *Mastering Palm Organizers*.

Dedication

This book is dedicated to everyone with a love for lifelong learning.

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Introduction

Microsoft Outlook has become an essential business tool in the years since I covered its first prerelease versions in 1996. If you work in a company that employs more than a dozen people, it's virtually certain that most of your communications and time planning will take place in Microsoft Outlook. Knowing Outlook well can make you more successful at work. Whether you're taking directions from your boss, giving directions to your employees, organizing meetings, collaborating on important projects, or just keeping up with business, Outlook is what you'll use to get it done fast.

Not understanding Outlook is almost like not understanding how to get to work. Because Outlook is so popular, hundreds of millions of people now spend their entire workday using Outlook one way or another. Now that more companies encourage telecommuting and hire employees who work from home, Outlook is the virtual workplace of so many people.

I've had the pleasure of training literally thousands of people on all the different ways Outlook can improve their workflow and simplify their life. People are often surprised to discover how much faster they can work when they know to use Outlook effectively.

Microsoft Outlook was designed to make organizing your daily work blindingly easy — almost automatic. You already have sophisticated programs for word processing and number crunching, but Outlook pulls together everything you need to know about your daily tasks, appointments, e-mail messages, and other details. More important, Outlook enables you to use the same methods to deal with many different kinds of information, so you

have to understand only one program to deal with the many kinds of details that fill your life, such as

- ✓ Setting up a conference call with colleagues
- ✓ Sending links to a webinar for a marketing campaign
- ✓ Exchanging information about important projects
- ✓ Reminding people to do the things they promised to do
- ✓ Recording all the work you do so that you can find what you did and when you did it

Outlook is a personal information manager that can act as your assistant in dealing with the flurry of small but important details that stand between you and the work you do. You can just as easily keep track of personal information that isn't business-related and keep both business and personal information in the same convenient location.

About This Book

As you read this book and work with Outlook, you discover how useful Outlook is, as well as find new ways to make it more useful for the things you do most. If you fit in any of the following categories, this book is for you:

- ✓ You just got a job with a company that uses Outlook as its e-mail program and you need to find out how to use it in a hurry.
- ✓ You've used Outlook for years just because "it was there," but you know you've only used a tenth of its power. Now you're overwhelmed with work and want to plow through that mountain of tasks faster by using Outlook better.

- ✓ You're planning to buy (or have just bought) Outlook and want to know what you can do with it — as well as how to do your work more efficiently.
- ✓ You want an easier, faster tool for managing tasks, schedules, e-mail, and other details in your working life.

Even if you don't fall into one of these groups, this book gives you simple, clear explanations of how Outlook can work for you. It's hard to imagine any computer user who wouldn't benefit from understanding Outlook better. If all you want is a quick, guided tour of Outlook, you can skim this book; it covers everything you need to get started. Getting a handle on most major Outlook features is fairly easy — that's how the program is designed. (You can also keep the book handy as a reference for the tricks that you may not need every day.)

Don't be fooled, though — you can find a great deal of power in Outlook if you want to dig deeply enough. Outlook links with your Microsoft Office applications, and it's programmable by anyone who wants to tackle some Visual Basic script writing. (I don't get into that in this book.) You may not want to do the programming yourself, but finding people who can do that for you isn't hard; just ask around.

Foolish Assumptions

I assume that you know how to turn on your computer and how to use a mouse and keyboard. In case you need a brushup on Windows, I throw in reminders as I go along. If Windows and Microsoft Office are strange to you, I recommend picking up (respectively) Andy Rathbone's *Windows 8 For Dummies* or Wally Wang's

Microsoft Office 2013 For Dummies (both published by Wiley).

If all you have is a copy of this book and a computer running Outlook, you can certainly do basic, useful things right away (like send and receive e-mail), as well as a few fun things. And after some time, you'll be able to do *many* fun and useful things.

How This Book Is Organized

To make it easier to find out how to do what you want to do, this book is divided into parts. Each part covers a different aspect of using Outlook. Because you can use similar methods to do many different jobs with Outlook, the first parts of the book focus on *how* to use Outlook. The later parts concentrate on *what* you can use Outlook to do.

Part I: Getting Started with Outlook 2013

I learn best by doing, so the first chapter is a quick guide to the things that most people do with Outlook on a typical day. You find out how to use Outlook for routine tasks such as handling messages, notes, and appointments. You can get quite a lot of mileage out of Outlook, even if you only check out the things I describe in the first chapter.

Because Outlook allows you to use similar methods to do many things, I go on to show you the things that stay pretty much the same throughout the program: how to create new items from old ones by using drag and drop; ways to view items that make your information easy to

understand at a glance; and the features Outlook offers to make it easier to move, copy, and organize your files.

Part II: Taming the E-Mail Beast

E-mail is now the most popular function of computers. Tens of millions of people are hooked up to the Internet or an office network. The problem is that e-mail can still be a little too complicated. As I show you in Part II, however, Outlook makes e-mail easier. Computers are notoriously finicky about the exact spelling of addresses, correctly connecting to the actual mail service, and making sure that the text and formatting of the message fit the software you're using. Outlook keeps track of the details involved in getting your message to its destination.

Outlook also allows you to receive e-mail from a variety of sources and manage the messages in one place. You can slice and dice your list of incoming and outgoing e-mail messages to help you keep track of what you send, to whom you send it, and the day and time you send it.

Part III: Managing Contacts, Dates, Tasks, and More

Outlook takes advantage of its special relationship with your computer and your office applications (Microsoft Outlook with Microsoft Office, Microsoft Internet Explorer, and Microsoft Windows — notice a pattern?) to tie your office tasks together more cleanly than other such programs, and to make it easier to deal with all the stuff you have to do. The chapters in Part III show you how to get the job done with Outlook.

In addition to planning and scheduling, you probably spend lots of time working with other people. You need to coordinate your tasks and schedules with theirs (unless you make your living doing something weird and

antisocial, such as digging graves or writing computer books). Outlook allows you to share calendar and task information with other people, and also keep detailed information about the people with whom you collaborate. You can also assign tasks to other people if you don't want to do those tasks yourself. (Now *there's* a time-saver.) Be careful, though; other people can assign those tasks right back to you.

If you have yellow sticky notes covering your monitor, refrigerator, desktop, or bathroom door, Outlook's Notes feature might change your life. Notes are little yellow (or blue or green) squares that look just like those handy paper notes that you stick everywhere as reminders and then lose. About the only thing that you can't do is set your coffee cup on one and mess up what you wrote.

Part IV: Beyond the Basics: Tips and Tricks You Won't Want to Miss

Some parts of Outlook are less famous than others, but no less useful. Part IV guides you through the sections of Outlook that the real power users exploit to stay ahead of the pack.

Outlook has parts that many people never discover. Some of those parts are obscure but powerful — others aren't part of Outlook at all (technically speaking). Maybe you want to know how to do things like create custom forms and set up Outlook to get e-mail from the Internet. If you use Outlook at home or in your own business, or if you just want to soup up your copy of Outlook for high-performance work, you'll find useful tips in Part IV.

Part V: Outlook at Work

Big organizations have different requirements than small businesses. Many large companies rely heavily on Outlook as a tool for improved teamwork and project