

## Outlook 2013 Advanced

**Length:** 1 Day

**Experience Needed:** Outlook 2013 – Introduction, or relevant experience

**Summary:** In our Intermediate/advanced level course, students will learn to track and group messages, prioritize and delegate tasks, manage contact records, and create and use templates. They will also learn to use different print styles and archive Outlook items.

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### COURSE CONTENT

#### 1: USING ADVANCED MANAGEMENT FEATURES

- Managing Items
- Setting Up AutoArchiving
- Archiving Manually
- Retrieving Archived Items
- Creating and Applying Categories
- Finding Items
- Grouping Items
- Creating and Clearing a Filter
- Customizing Outlook
- Setting Options
- Adding Shortcuts to the Outlook Bar
- Moving a Shortcut on the Outlook Bar
- Removing a Shortcut from the Outlook Bar
- Changing Your Password

#### 2: OPTIMIZING MAIL FUNCTIONS

- Using Address Books
- Using an Address Book to Address a Message
- Adding a Name to Your Personal Address Book
- Creating an Alias in Your Personal Address Book
- Selecting a Default Address Book
- Working with Personal Distribution Lists
- Creating a Personal Distribution List
- Editing a Personal Distribution List
- Deleting a Personal Distribution List
- Using Message Features

- Saving and Closing a Message without Sending It
- Setting Spelling Options
- Setting Additional Spelling Features
- Setting and Using Message Options
- Using Voting Buttons
- Flagging a Message
- Recalling a Message
- Attaching a File
- Opening, Closing, and Saving an Attached File
- Accessing the Internet
- Inserting and Editing a Hyperlink in a Message
- Using a Hyperlink in a Message
- Using the Web Toolbar

#### 3: WORKING WITH CONTACTS

- Creating a Contact List
- Adding Contacts Manually
- Selecting and Editing an Address Card
- Transmitting and Adding Contacts with E-mail
- Managing Contacts
- Changing the Current View

#### 4: WORKING WITH OTHER USERS

- Scheduling Meetings
- Inviting Colleagues and Setting a Meeting Time
- Inviting a Contact to a Meeting
- Responding to a Meeting Request
- Reviewing Meeting Information

- Rescheduling and Cancelling a Meeting
- Scheduling an Event
- Completing Tasks
- Scheduling a Task
- Regenerating a Task
- Assigning a Task to Someone Else
- Responding to a Task Request
- Reclaiming Ownership of a Declined Task
- Creating a New Item from an Existing One

#### **5. WORKING WITH TEMPLATES AND FORMS**

- Working with Templates
- Using a Template
- Creating a Template
- Utilizing Forms
- Installing Sample Forms
- Using a Form
- Creating a Form
- Modifying an Existing Form
- Publishing and Saving a New Form
- Creating a Form from Another Program

#### **APPENDIX A: SENDING AND RECEIVING FAXES**

- Setting Up Microsoft Fax
- Installing Microsoft Fax
- Configuring Microsoft Fax
- Using Microsoft Fax
- Sending a Fax Using Outlook
- Retrieving a Fax Using Outlook

#### **APPENDIX B: MAKING PHONE CALLS**

- Objectives
- Setting Up AutoDialer
- Setting Up Your Phone Line
- Setting a Location for AutoDialer
- Setting Up AutoDialer for Using a Calling Card
- Using AutoDialer
- Placing a Phone Call
- Creating a Speed Dial List
- Dialing a Person in the Speed Dial List
- Redialing a Phone Number

#### **APPENDIX C: WORKING OFFLINE OR FROM A REMOTE WORKSTATION**

- Objectives
- Managing Outlook Folders Offline
- Setting Up Offline Folders
- Choosing Folders to Use Offline
- Synchronizing Folders
- Starting Outlook Offline
- Managing Remote Mail
- Deciding to Work with Offline Folders or to Use Remote Mail
- Setting Up Remote Mail
- Using Remote Mail

#### **APPENDIX D: SETTING UP THE CLASSROOM**

- Objectives
- Preparing Outlook on Your Server
- Option 1: Setting Up Outlook on a LAN
- Option 2: Creating a Classroom Workgroup Post office
- Preparing Files
- Mailbox.pst
- Data Folder
- Preparing Each Workstation
- Creating a User Profile on a Workstation
- Changing Outlook Default Settings
- Checking Your Setup
- Installing an Internet Browser
- After Class or Before Your Next Outlook Class