CALIFORNIA STATE UNIVERSITY, LOS ANGELES
INFORMATION TECHNOLOGY SERVICES

Microsoft Outlook 2013
Part 2: Intermediate Outlook

Spring 2015, Version 1.0

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Introduction

Microsoft Outlook 2013 is a great tool for communication, time and information management, and collaboration. It is used to send and receive email messages as well as manage your schedule, contacts, and tasks. To minimize the work of dealing with such diverse items, Outlook provides a module for each item type and presents each module in a similar interface, allowing you to work with different items in a consistent way. This handout covers working with the calendar, contacts, and tasks, as well as managing your mailbox.

Calendar

The *Calendar* module allows you to schedule and track appointments and meetings. You can view your calendar in several different formats (*Day*, *Work Week*, *Week*, *Month*, and *Schedule View*) by using the buttons in the *Arrange* group on the *Home* tab of the *Ribbon*.

The *Date Navigator* is a small calendar at the top of the Folder pane that can be used to navigate from one date to another. The current date is highlighted with a dark blue background. Days that contain scheduled items appear in bold type; days with no scheduled items appear as regular text. You can use the left and right arrows at the top of the Date Navigator to scroll to another month.

To display the Calendar module:

1. On the **Navigation** bar, click **Calendar** (see Figure 1).

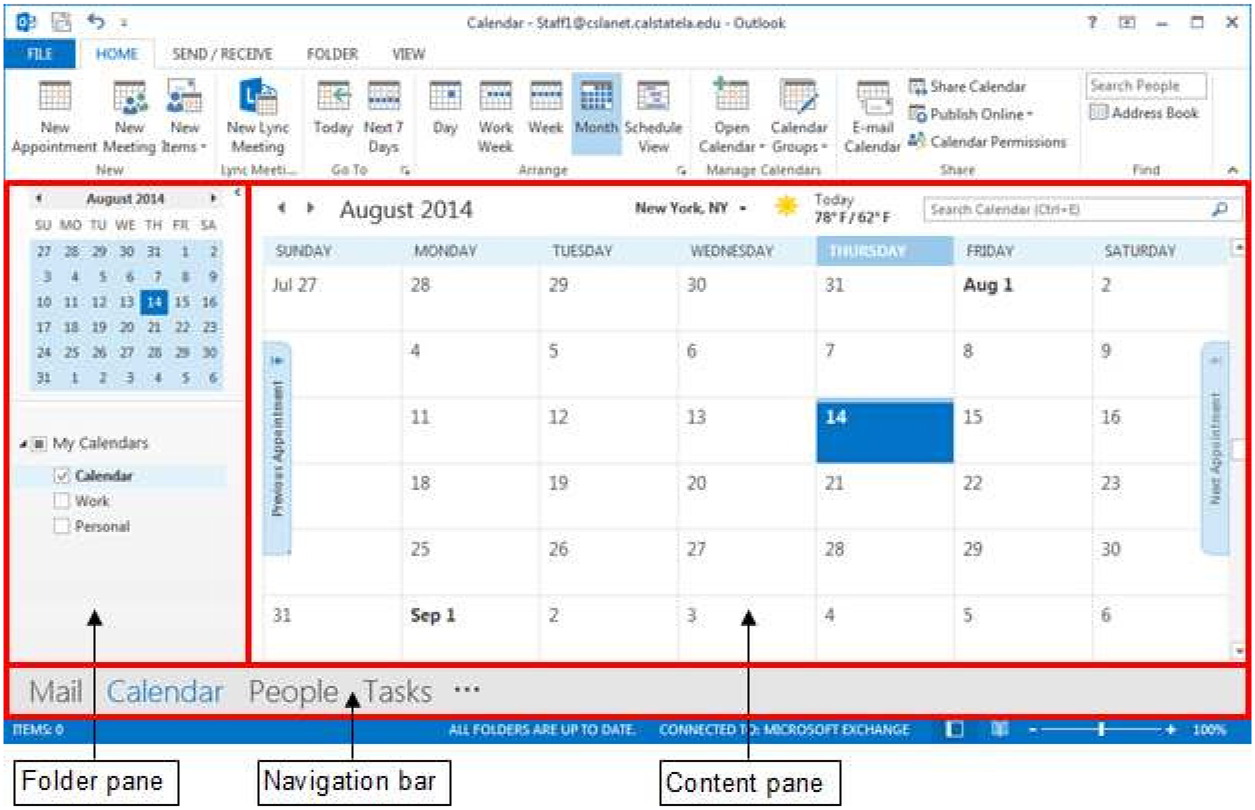

Calendar - Staff1@cslanet.calstatela.edu - Outlook
FILE
HOME
SEND / RECEIVE
FOLDER
VIEW
New Appointment
New Meeting
New Items
New Lync Meeting
Today
Next 7 Days
Day
Work Week
Week
Month
Schedule View
Open Calendar
Calendar Groups
E-mail Calendar
Share Calendar
Publish Online
Calendar Permissions
Search People
Address Book
New
Lync Meeti...
Go To
Arrange
Manage Calendars
Share
Find
August 2014
My Calendars
Calendar
Work
Personal
New York, NY
Today 78° F / 62° F
Search Calendar (Ctrl+E)
SUNDAY
MONDAY
TUESDAY
WEDNESDAY
THURSDAY
FRIDAY
SATURDAY
Previous Appointment
Next Appointment
Mail
Calendar
People
Tasks
ITEMS: 0
ALL FOLDERS ARE UP TO DATE.
CONNECTED TO: MICROSOFT EXCHANGE
100%
Folder pane
Navigation bar
Content pane

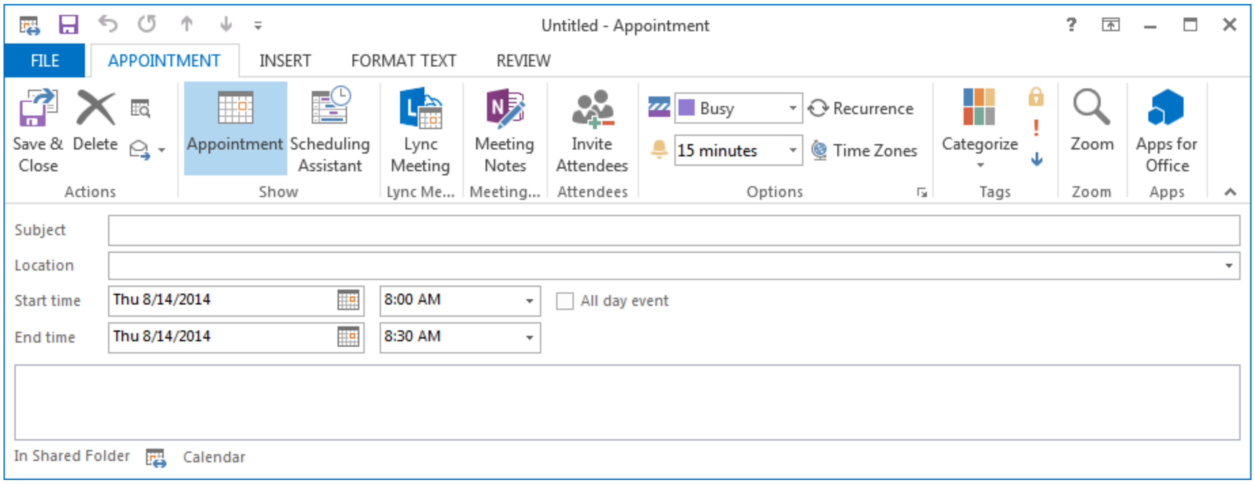
Figure 1 – Outlook 2013 Program Window Displaying the Calendar Module

Scheduling Appointments

Appointments are activities that you schedule in your calendar that do not involve inviting other people. You can schedule one-time appointments or recurring appointments.

To schedule an appointment:

1. In the **Calendar** module, on the **Home** tab, in the **New** group, click the **New Appointment** button . The **Appointment** window opens (see Figure 2).

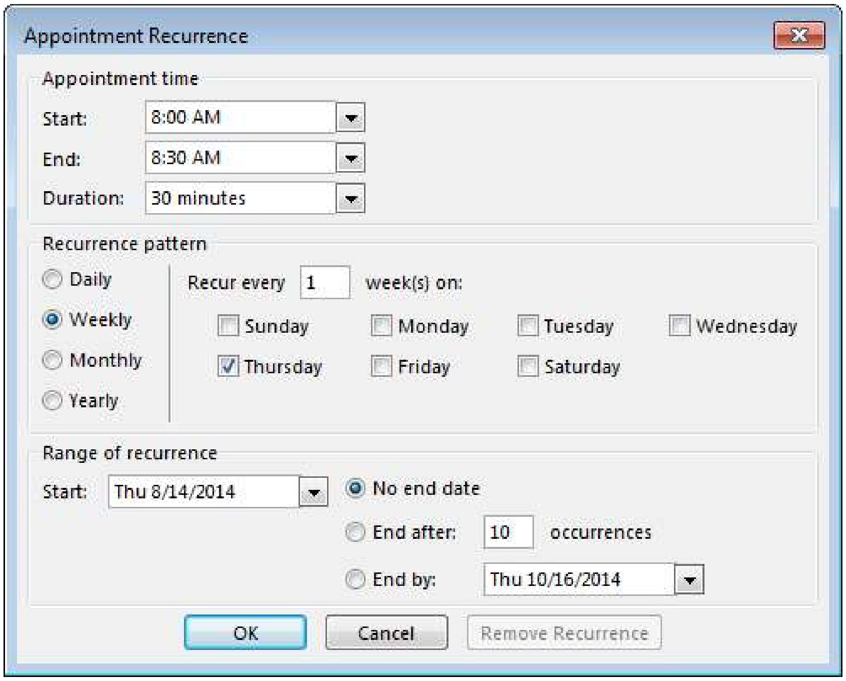

Untitled - Appointment
FILE
APPOINTMENT
INSERT
FORMAT TEXT
REVIEW
Save & Close
Delete
Actions
Appointment
Scheduling Assistant
Show
Lync Meeting
Lync Me...
Meeting Notes
Meeting...
Invite Attendees
Attendees
Busy
15 minutes
Recurrence
Time Zones
Options
Categorize
Tags
Zoom
Zoom
Apps for Office
Apps
In Shared Folder
Calendar

Subject:
Location:
Start time: Thu 8/14/2014 8:00 AM ☐ All day event
End time: Thu 8/14/2014 8:30 AM

Figure 2 – Appointment Window

2. In the **Subject** box, type a short description for the appointment.
3. In the **Location** box, type a location for the appointment.
4. In the **Start time** and **End time** boxes, enter the desired dates and times.
5. By default, Outlook adds a 15-minute reminder to appointments. To change when the reminder appears, on the **Appointment** tab, in the **Options** group, click the **Reminder** arrow 15 minutes and select the desired time from the list.

   NOTE: If you want to create a recurring appointment, on the **Appointment** tab, in the **Options** group, click the **Recurrence** button to open the **Appointment Recurrence** dialog box, set the recurrence pattern and range of recurrence, and then click the **OK** button (see Figure 3).


Appointment Recurrence
Appointment time
Recurrence pattern
Range of recurrence
OK
Cancel
Remove Recurrence

Start: 8:00 AM
End: 8:30 AM
Duration: 30 minutes

○ Daily
● Weekly
○ Monthly
○ Yearly

Recur every 1 week(s) on:
☐ Sunday ☐ Monday ☐ Tuesday ☐ Wednesday
☑ Thursday ☐ Friday ☐ Saturday

Start: Thu 8/14/2014
● No end date
○ End after: 10 occurrences
○ End by: Thu 10/16/2014

Figure 3 – Appointment Recurrence Dialog Box

6. On the **Appointment** tab, in the **Actions** group, click the **Save & Close** button.

Updating or Deleting Appointments

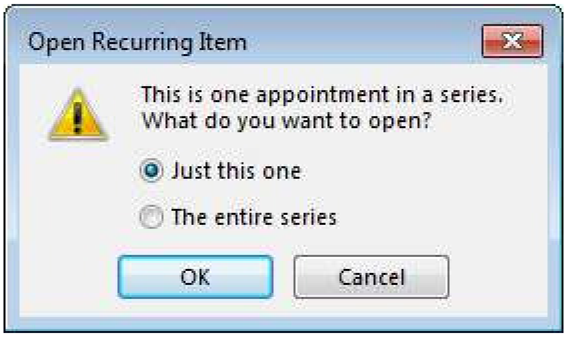
If the information about an appointment has changed since it was scheduled, you can update the appointment. You can also delete an appointment and remove it from your calendar. When you delete an appointment, Outlook moves it to the Deleted Items folder.

NOTE: When working with one-time appointments, the *Calendar Tools Appointment* tab becomes available on the Ribbon; when working with recurring appointments, the *Calendar Tools Appointment Series* tab becomes available on the Ribbon.

To update an appointment:

1. In the **Calendar** module, in the **Content** pane, double-click the appointment that you want to update. The appointment opens in the **Appointment** window.

   NOTE: If you double-click a recurring appointment, the **Open Recurring Item** dialog box opens. Select the **Just this one** option to update only that appointment or **The entire series** option to update every appointment in the series, and then click the **OK** button (see Figure 4).



This is one appointment in a series. What do you want to open?

● Just this one

○ The entire series

Figure 4 – Open Recurring Item Dialog Box

2. Make the desired changes.
3. On the **Appointment** tab, in the **Actions** group, click the **Save & Close** button.

To delete an appointment:

1. In the **Calendar** module, in the **Content** pane, select the appointment that you want to delete.
2. Under **Calendar Tools**, on the **Appointment** tab, in the **Actions** group, click the **Delete** button.

   NOTE: If you are deleting a recurring appointment, click the **Delete** button in the **Actions** group on the **Appointment Series** tab, and then click **Delete Occurrence** to delete only that appointment or **Delete Series** to delete every appointment in the series (see Figure 5).

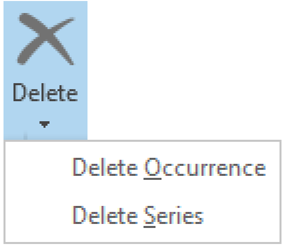


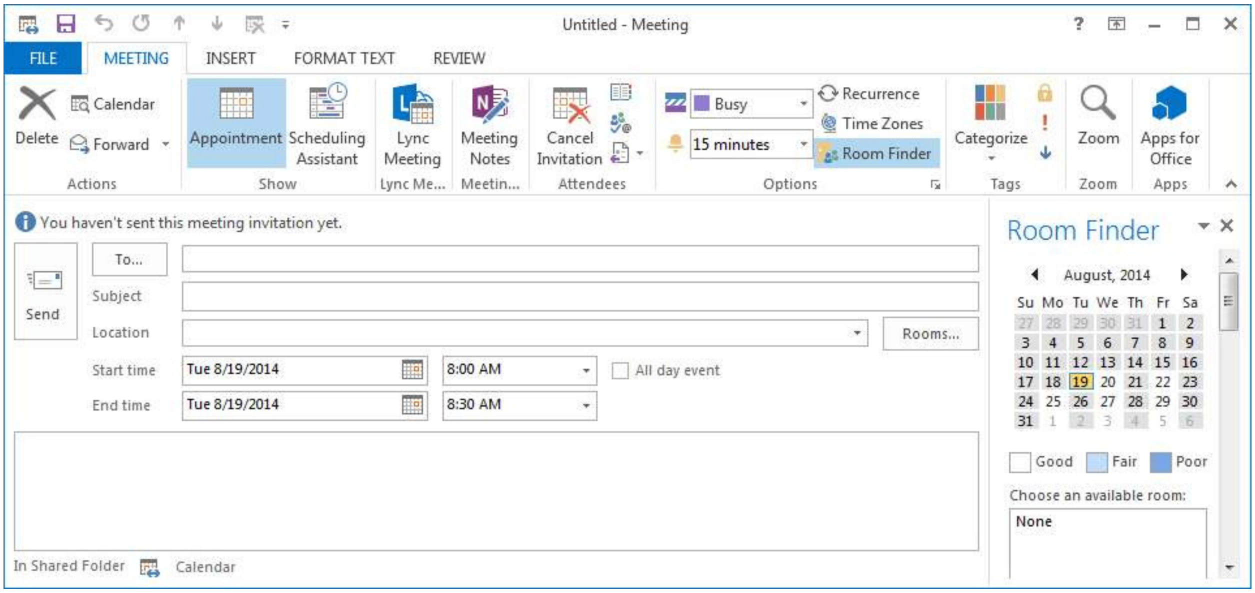
Figure 5 – Delete Menu

Scheduling Meetings

Meetings are appointments to which you invite other people. You can schedule one-time meetings or recurring meetings. Responses to your meeting request appear in your Inbox folder.

To schedule a meeting:

1. In the **Calendar** module, on the **Home** tab, in the **New** group, click the **New Meeting** button. The **Meeting** window opens (see Figure 6).


Untitled - Meeting
FILE
MEETING
INSERT
FORMAT TEXT
REVIEW
Delete
Calendar
Forward
Actions
Appointment
Scheduling Assistant
Show
Lync Meeting
Lync Me...
Meeting Notes
Meetin...
Cancel Invitation
Attendees
Recurrence
Time Zones
Room Finder
Options
Categorize
Tags
Zoom
Zoom
Apps for Office
Apps
Send
To...
Subject
Location
Rooms...
Start time
End time
All day event
In Shared Folder
Calendar
Room Finder
August, 2014
Su Mo Tu We Th Fr Sa
Good
Fair
Poor
Choose an available room:

You haven't sent this meeting invitation yet.

Busy

15 minutes

Start time: Tue 8/19/2014 8:00 AM

End time: Tue 8/19/2014 8:30 AM

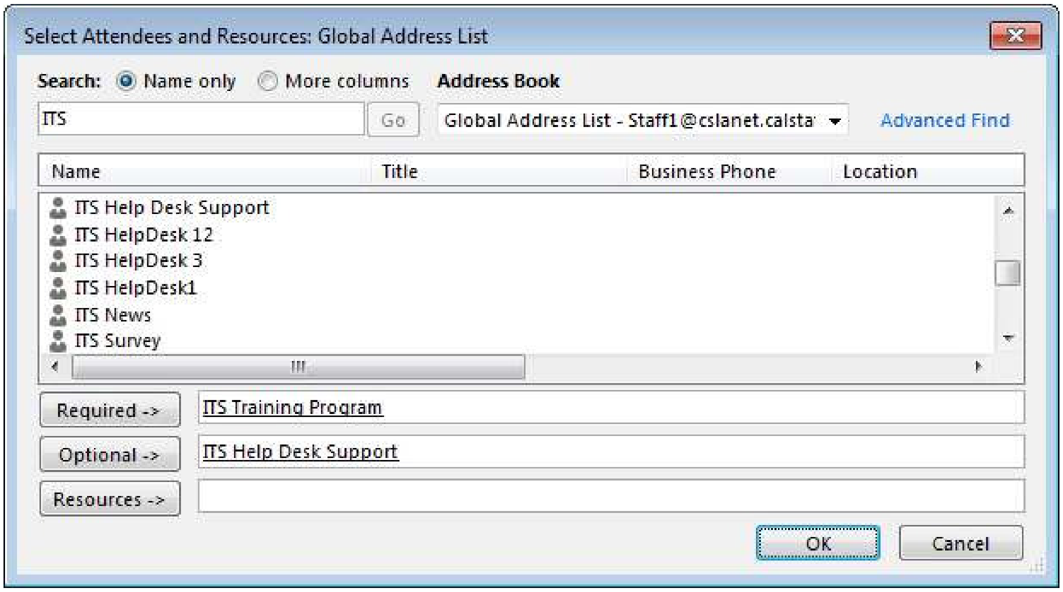
☐ All day event

Choose an available room: None

Figure 6 – Meeting Window

2. In the **To** box, type the email address of each person that you want to invite to the meeting. Separate multiple entries with a semicolon (;).

   NOTE: You can also add attendees by clicking the **To** button to open the **Select Attendees and Resources** dialog box, locating and selecting each person that you want to invite to the meeting, clicking the **Required** button if the person must attend or the **Optional** button if the person is not required to attend, and then clicking the **OK** button (see Figure 7).


Select Attendees and Resources: Global Address List
Go
Advanced Find
Name
Title
Business Phone
Location
Required ->
Optional ->
Resources ->
OK
Cancel

Search: ● Name only ○ More columns

ITS

Address Book: Global Address List - Staff1@cslanet.calsta

ITS Help Desk Support
ITS HelpDesk 12
ITS HelpDesk 3
ITS HelpDesk1
ITS News
ITS Survey

Required -> ITS Training Program

Optional -> ITS Help Desk Support

Figure 7 – Select Attendees and Resources Dialog Box

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