Upgrading your EDGE to Outlook 2013

TOPICS COVERED INCLUDE:

- Overview of Differences
- Navigating and Shortcuts in 2013
- Recommended Calendar and Task Views
- Setting Up Categories
- Turning Off Email Notifications
- Creating an Outlook Data File
- Working with Email Conversations
- Using Email Filters to View Messages
- Creating a Quick Step Shortcut
- Creating a Meeting Request from an Email
- Creating an Email Signature

Overview of Changes in Outlook 2013

As an Effective EDGE graduate, you have embraced the solutions of the EDGE thought processes, using the 4D's to make fast and smart decisions to increase your productivity and reduce stress. If you are upgrading to Outlook 2013 from a previous version of Outlook, you don't want to let that transition slow you down. This guide details the new features of Outlook 2013 that will help you keep your EDGE and be more productive.

Outlook 2013 has a new look to make it easier to navigate whether you are using a computer, tablet or mobile phone and integrates a number of new shortcuts to speed up processing your inbox and working with your calendar.

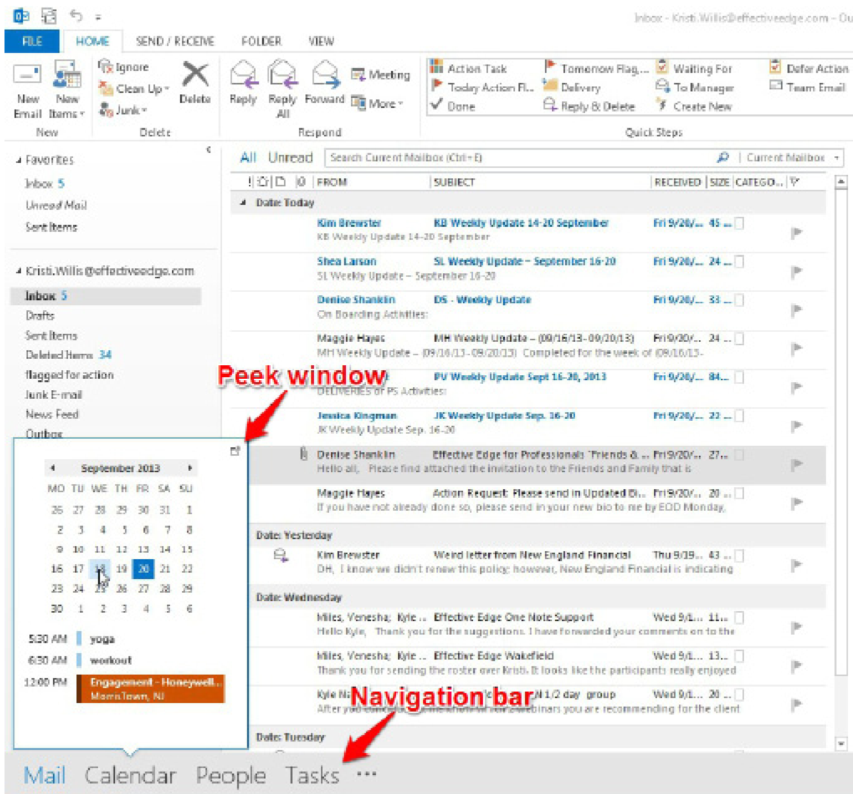
Following are some of the new features in Outlook 2013:

- The navigation panel that allows you to move between various Outlook functions has been replaced by a navigation bar at the bottom of screen. You can hover over the Calendar, People or Task items to get a quick preview.
- Outlook 2013 includes a number of shortcuts so that you can process email and add items to the Calendar more quickly.

If you are switching to Outlook 2013 from Outlook 2003 or 2007, you will also enjoy using features that were added in Outlook 2010.

- You can now manage your email using the Conversation View, collapsing multiple emails that are part of the same conversation even if you've filed the emails in a folder. Using conversations, you can easily ignore messages related to a topic that is not relevant to you or clean up multiple messages in a discussion, only keeping the most recent message.
- The new Filter Email tool makes it easy for you to manage your mailbox by quickly showing you messages with attachments, only the unread, or the items that you were copied (cc:) on. You can also create your own filters.
- Using Quick Steps you can create shortcuts for the tasks you do most often like filing email in a particular folder, emailing a group of recipients or creating a new Task from an email. We recommend creating a Quick Step to help you process your email with the 4D's more quickly, deferring actions to the Task list or Calendar.

New Navigation Tools in Outlook 2013

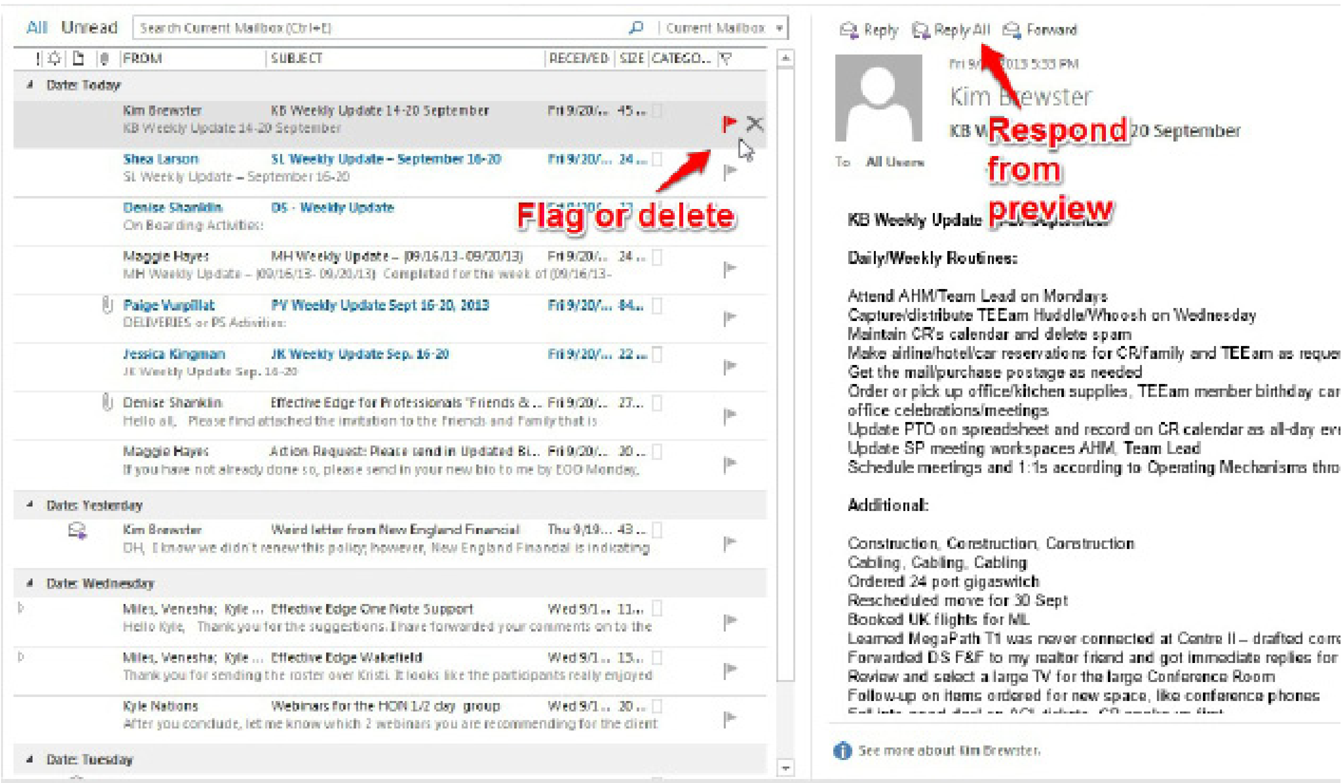


Navigation Bar and Peek

The navigation bar now appears at the bottom of the Outlook window. To view the Calendar, People (formerly Contacts) or Tasks, hover over the item to see the Peek window.

You can keep the Peek window open, by clicking the Pin icon.

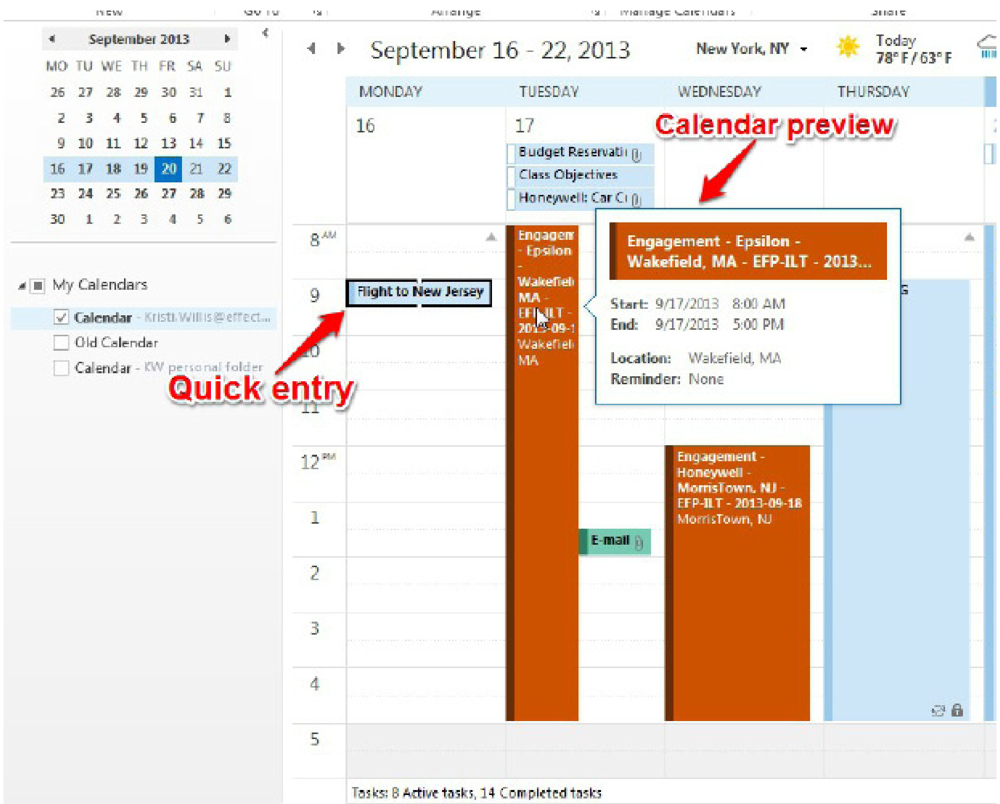
Processing Email Faster with Inline Actions



Inline actions let you edit from the inbox

Outlook 2013 includes inline actions that allow you to process email directly from the inbox. Hovering over an email displays the delete icon and the reply, reply all and forward option appear in the reading pane.

Calendar Preview and Quick Entry

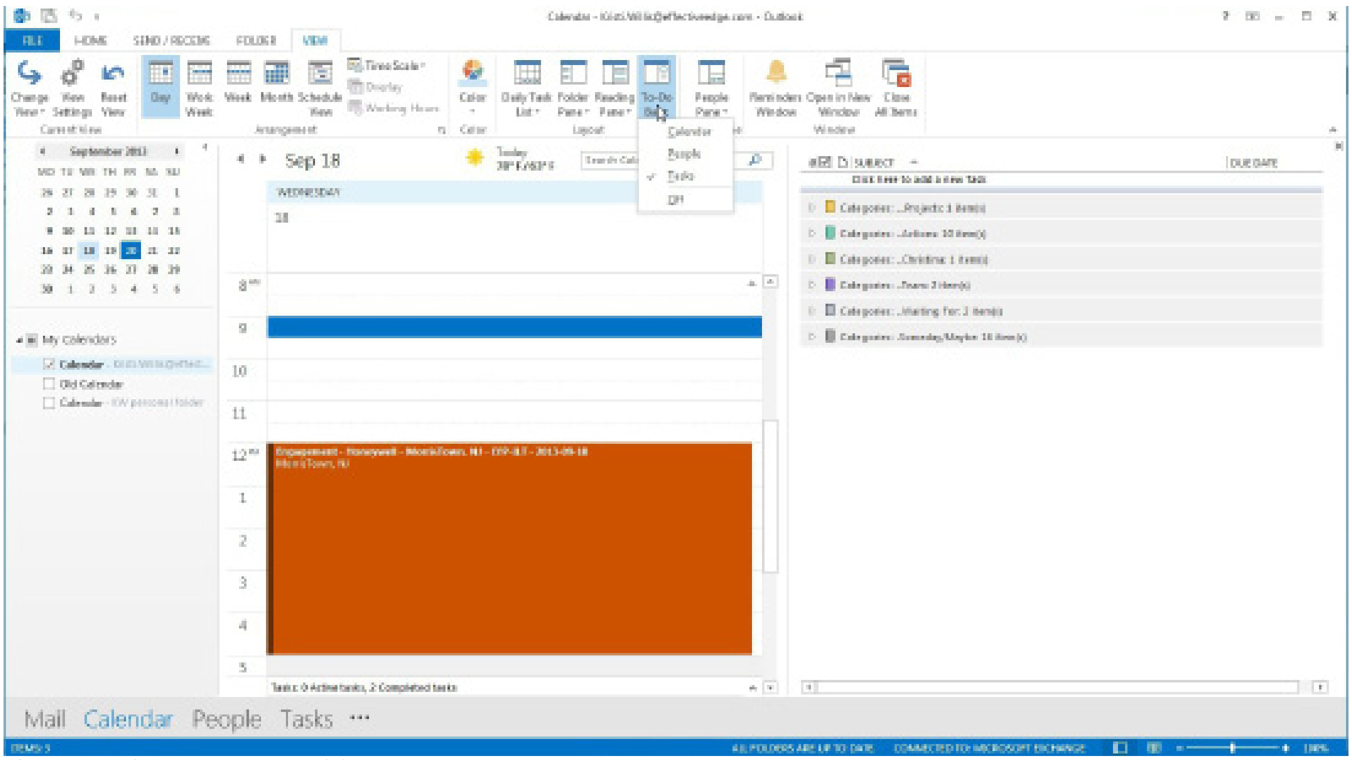


Quick entry and calendar peek

The calendar preview window, displaying the details of the appointment, appears when you hover over any calendar item.

Quick entry lets you add an item to the calendar by clicking on the time slot and typing a subject.

Setting up the EDGE:
Configuring the Recommended Calendar View



One-Day Calendar and the To-Do Bar

TO SET UP THE RECOMMENDED CALENDAR VIEW:

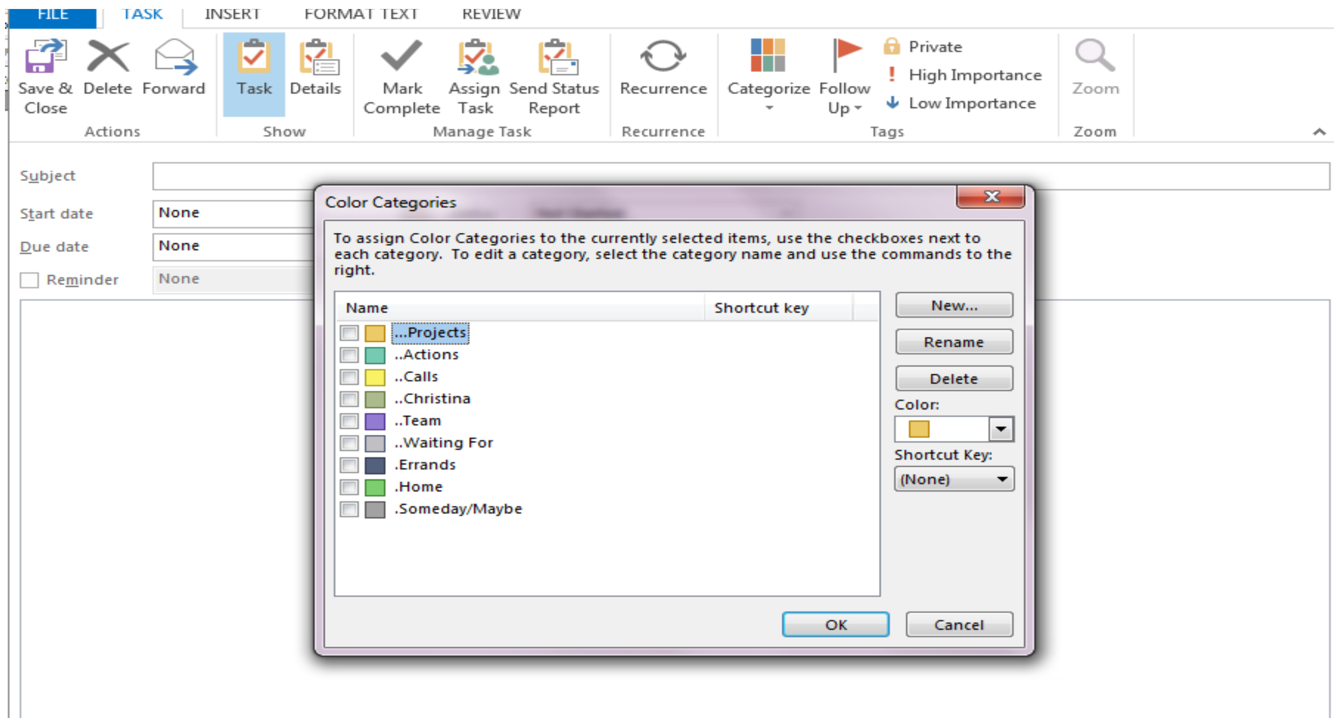
1. View the Calendar.
2. Click the DAY button on the HOME tab.
3. Click the VIEW tab. Click the TO-DO BAR button and choose TASKS.
4. Place the cursor between the panels so that the mouse pointer turns into multi-directional arrows and drag the panel to the left to widen the display.
5. On the VIEW tab, click the TO-DO BAR button and choose APPOINTMENTS to turn off the Appointment list in the To-Do Bar. If QUICK CONTACTS is also selected, click on TO-DO BAR button and choose QUICK CONTACTS to turn it off.
6. On the VIEW tab, click on the DAILY TASK LIST button and choose OFF.
7. Click on the 3 dots on the Navigation bar (…)
8. Choose Navigation Options…
9. Change the Maximum number of visible items to 5.
10. Choose OK.

Setting up the EDGE: Customizing the To-Do Bar View

TO SET UP THE TO-DO BAR VIEW:

1. View the Calendar. Right-click on one of the column headings on the To-Do Bar Task List and select VIEW SETTINGS from the menu.
2. To change the columns that display in the To-Do Bar, click the COLUMNS button:
    a. Highlight all of the columns in the SHOW THESE COLUMNS IN THIS ORDER list box and click the REMOVE button.
    b. Change the Select Available Columns option to FREQUENTLY USED FIELDS.
    c. Add the Icon, Complete, Attachment, Subject and Due Date columns by clicking on each one and clicking the ADD button.
    d. Use the MOVE UP and MOVE DOWN buttons below the SHOW THESE COLUMNS IN THIS ORDER list to arrange the columns in the order listed in Step C.
    e. Click OK to close the SHOW COLUMNS dialog box.
3. To view the list by category:
    a. In the Customize View box, select GROUP BY.
    b. Uncheck the AUTOMATICALLY GROUP ACCORDING TO ARRANGEMENT option.
    c. Select CATEGORIES from the GROUP ITEMS BY list. Click the ASCENDING radio button to sort in alphabetical order.
    d. Select ALL COLLAPSED from the Expand/Collapse Defaults field.
    e. Click OK to close the GROUP BY box.
4. To sort the Tasks:
    a. In the Customize View box, select SORT, then select SUBJECT from the Sort Items By List. Click the ASCENDING radio button to sort in alphabetical order.
    b. Click OK to close the SORT BY box.
5. To change the Filter so that you don't see flagged items.:
    a. In the Customize View box, select FILTER, then click the ADVANCED tab.
    b. Highlight the Flag Completed Date option and click REMOVE.
    c. Under DEFINE MORE CRITERIA, click the down triangle next to the Field button, select ALL MAIL FIELDS, FLAG STATUS, DOES NOT EXIST.
    d. Click ADD TO LIST to save the FILTER and OK to close the Filter box.
6. To turn off automatic column sizing so that you can change the size of the columns manually:
    a. In the Customize View box, select OTHER SETTINGS.
    b. Uncheck the option AUTOMATIC COLUMN SIZING.
    c. Click OK and then OK again to close the Customize View box.
7. Click OK to save the changes from the View Settings dialog box.

Setting up the EDGE: Creating Categories



TO SET UP NEW CATEGORIES:

1. Press CTRL+SHIFT+K to create a new task.
2. Click the CATEGORIZE button on the TASK tab and select the ALL CATEGORIES option.
3. To add a new category, click the NEW button. Type the name in the Category Name text box. If desired, click on the Color drop down-box to assign a color to the Category. You can also assign a shortcut key to the category by selecting a function key combination from the Shortcut Key drop-down box. When you press the keystroke, Outlook will assign that category to the Task. Choose OK to save the Category.
4. Repeat step 3 for each new Category you wish to add.
5. When all Categories have been entered, uncheck any selected items, then click OK to close the Color Category dialog box. Close the Task by clicking the X in the top right corner of the dialog box.

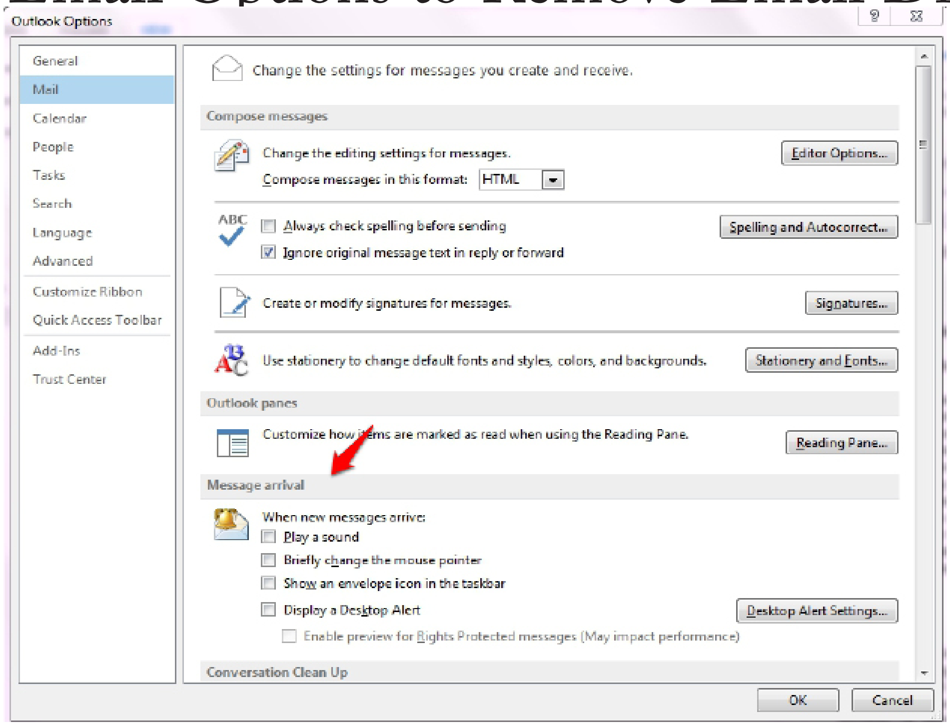
Following are the suggested categories:

...Projects	..Team
..Actions	.Errands
..Calls (optional)	.Home
..____(Manager's Name)	.Someday/Maybe

Setting Up the EDGE: Customizing the View In Tasks

1. Click on TASKS in the navigation bar.
2. From the HOME tab, select SIMPLE LIST from the CURRENT VIEW box.
3. To view the categories and sort the Tasks, right-click on the Task column headings and select VIEW SETTINGS from the menu.
    a. In the Customize View box, select GROUP BY.
    b. Uncheck the AUTOMATICALLY GROUP ACCORDING TO ARRANGEMENT option.
    c. Select CATEGORIES from the GROUP ITEMS BY list. Click the ASCENDING radio button to sort in alphabetical order.
    d. Select ALL COLLAPSED from Expand/Collapse Defaults field.
    e. Click OK to close the GROUP BY box.
    f. In the View Settings box, select SORT then select SUBJECT from the SORT ITEMS BY List. Click the ASCENDING radio button to sort in alphabetical order.
    g. Click OK to close the SORT BY box and then OK again to close the Customize View box.
    h. Click the FILTER button and select the ADVANCED tab. Under the DEFINE MORE CRITERIA section, select the FIELD button and choose ALL MAIL FIELDS, FLAG STATUS, DOES NOT EXIST.
    i Click the ADD TO LIST button, then choose OK to close the Filter dialog box.
    j. Click OK to close the View Settings dialog box.
6. If the To-Do Bar is showing, click on the VIEW tab, click on the TO-DO BAR button, and choose OFF from the menu.

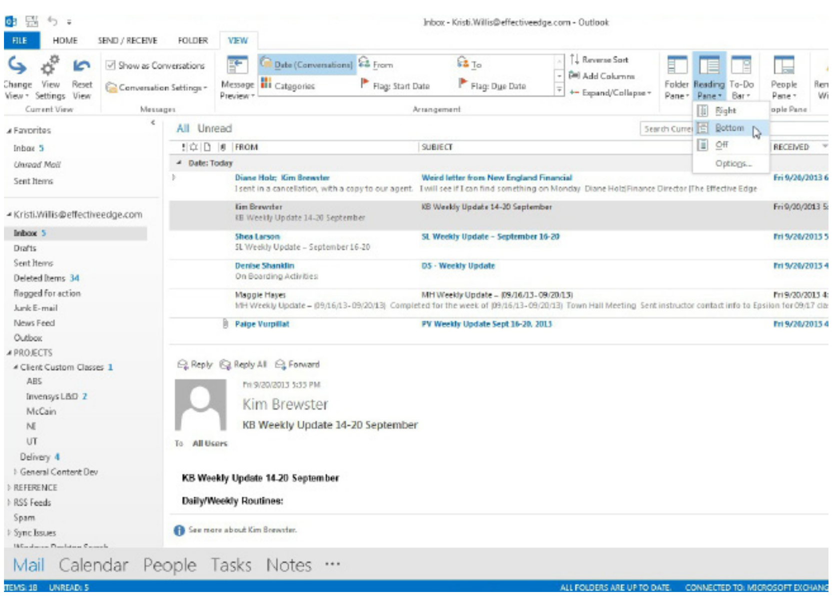
Setting Up the EDGE:
Email Options to Remove Email Distractions



Reset your email options to remove email distractions.

- Click on the FILE tab.
- Click on OPTIONS.
- Click on the MAIL option.
- Under the Message Arrival section, uncheck all 4 boxes.
- Click OK to save the changes.

Setting up Reading Pane



- Click on the VIEW tab and click on the READING PANE button.
- Select BOTTOM or RIGHT.

Creating and Managing Outlook Data Files

If you store your email on a server, such as Microsoft Exchange Server, a maximum mailbox limit may be set by your system administrator. Our first recommendation is to manage your mailbox size to keep it within this limit. However, if you have a large amount of mail that you need to store, an **Outlook Data File (PST)** files may be the best solution. Outlook Data Files are separate files that are not part of the mailbox and can be created to manage information that needs to be removed from the server mailbox due to this size limit. Please check with your IT department to determine if Outlook Data Files are allowed at your company and the maximum file sizes recommended.

With Outlook Data Files, you can create folders within the file and move information manually to store it in the file. Outlook Data Files are portable: you can move them from one computer to another and easily store them on a CD or other internal drive. You can store them on a computer that you share with other people and you can assign a password to help control who has access to the file. Outlook Data Files can be compressed which makes them an efficient way to store your messages.

MS OUTLOOK VERSION	MAXIMUM FILE SIZE	RECOMMENDED FILE SIZE
OUTLOOK 2010-2013	50 GB	12.5 GB
OUTLOOK 2003-2007	20 GB	5 GB
OUTLOOK 2000-2002	2 GB	500 MB

TO CREATE AN OUTLOOK DATA FILE:

1. From the mailbox, click on the HOME tab and click on the NEW ITEMS button.
2. Select MORE ITEMS, OUTLOOK DATA FILE from the menu.
3. Browse to the folder where you want to store the file, enter a file name and click OK.
4. Enter a password, if desired, and click OK.

Note: To ensure that you do not lose any information, consider saving this file on an internal drive that is backed up. Check with your IT department to determine the best approach and your personal back up needs.

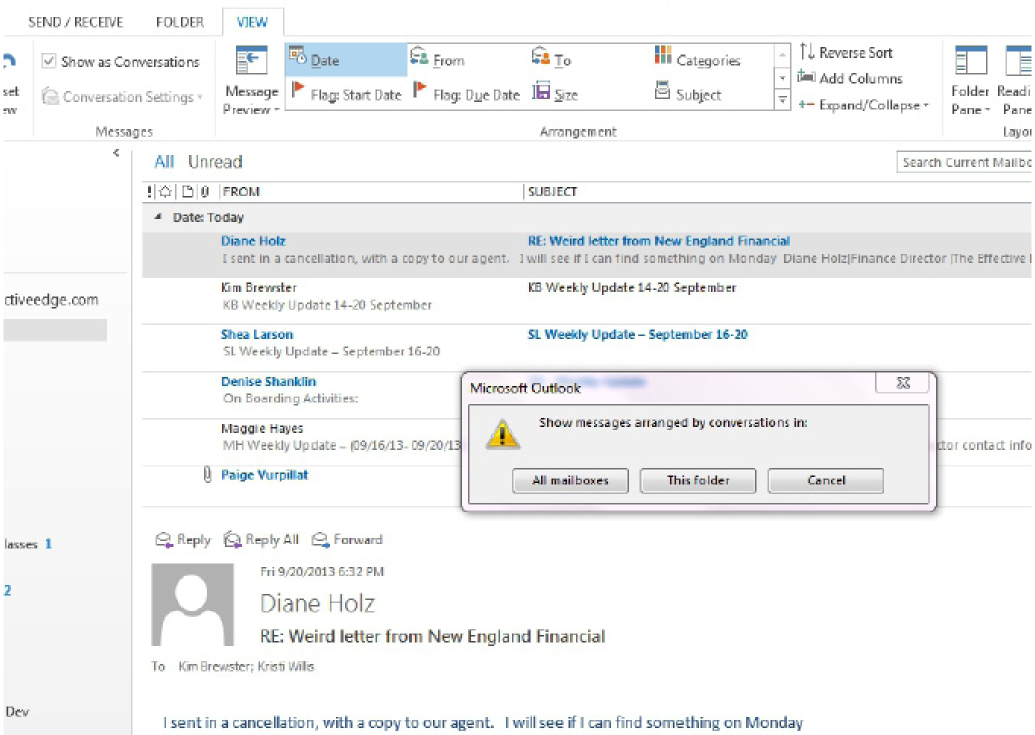
TO CHANGE THE NAME OF AN OUTLOOK DATA FILE:

1. Right-click on the Outlook Data file in the Navigation Pane and choose CLOSE.
2. Close Outlook.
3. Locate the file on disk and rename the file.
4. Open Outlook. Click on the FILE tab and choose OPEN.
5. Click on the OPEN OUTLOOK DATA FILE option, click on your file and click OK.

TO COMPRESS AN OUTLOOK DATA FILE:

1. Right-click on the Outlook Data File in the Navigation Pane and choose DATA FILE PROPERTIES.
2. Click the ADVANCED button.
3. Click on the COMPACT NOW button.

Working with Email Conversations



TO VIEW YOUR INBOX BY CONVERSATION:

1. From your mailbox, click on the VIEW tab.
2. In the CONVERSATIONS group, check mark the SHOW AS CONVERSATIONS option.
3. Click the ALL FOLDERS option to apply the Conversation view to all of your mail folders.
4. Click the down triangle next to the top level message in the conversation to view the conversation thread. To collapse the conversation, click the triangle again.

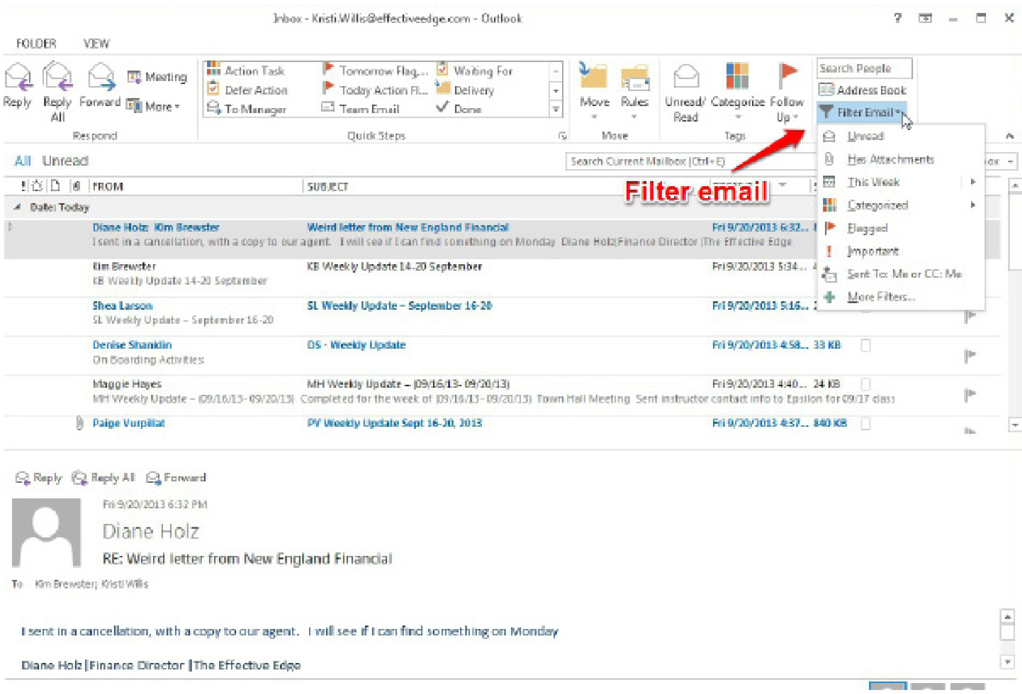
TO IGNORE A CONVERSATION:

1. Click on the HOME tab.
2. In the DELETE group, click on the IGNORE button. The conversation and all of its associated messages (previous and future) will be moved to the Deleted Items folder.

TO CLEAN UP A CONVERSATION:

1. Click on the HOME tab.
2. In the DELETE group, click on the CLEAN UP button and choose CLEAN UP CONVERSATION. Any redundant messages (messages whose entire content is contained in another message) will be moved to the Deleted Items folder.
3. If you want to clean up multiple conversations, highlight all the messages you want to work with and click the CLEANU UP button.

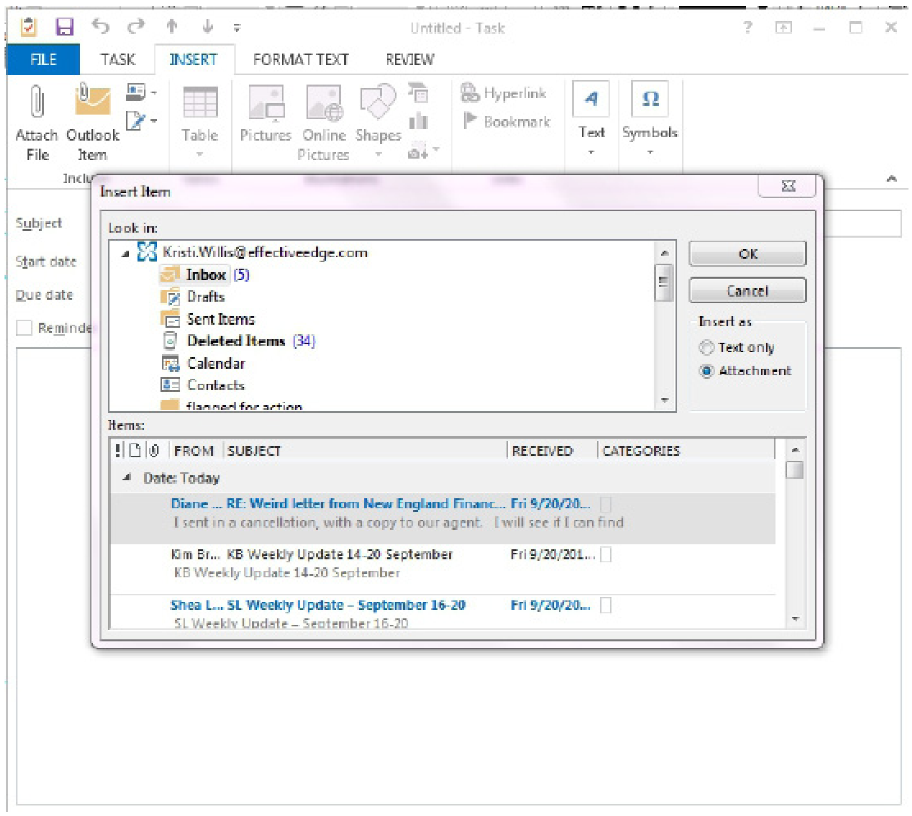
Using The Filter Email Tool



TO FILTER YOUR INBOX:

1. Click on the FILTER EMAIL button on the HOME tab in the mailbox.
2. Select the type of messages you would like to view.
3. When you have finished reviewing the messages, click the CLOSE SEARCH button on the ribbon to return to your full mailbox.

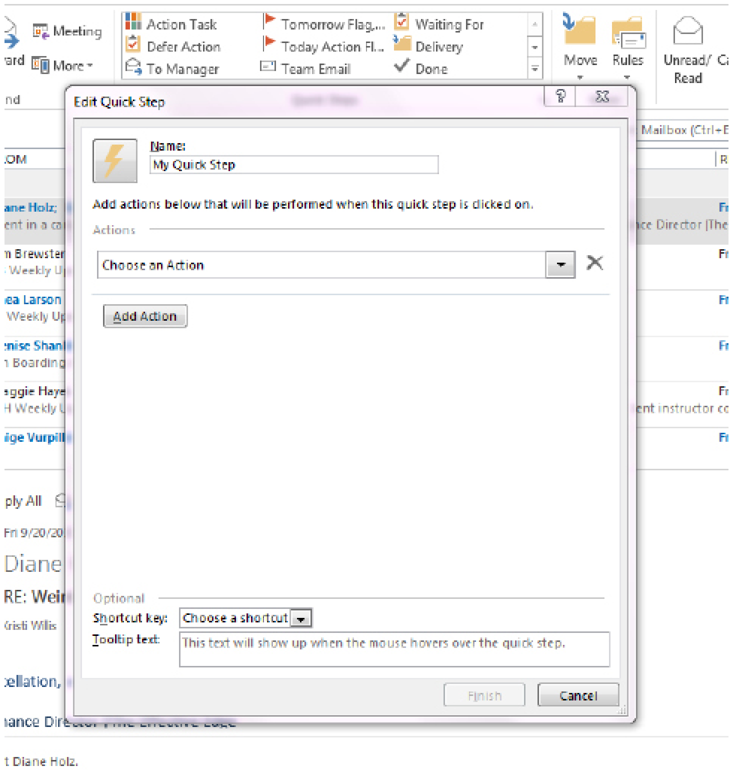
Inserting an Email into a Calendar Item or Task



TO INSERT AN OUTLOOK ITEM IN AN EXISTING TASK OR APPOINTMENT:

1. Double-click to open the existing Appointment or Task in which you want to insert the email.
2. Click the INSERT tab.
3. Click the OUTLOOK ITEM button
4. Select the folder the item is stored in. The list defaults to the Inbox, but you can change the folder in the Look In list box. Select the item you want to be inserted.
5. If you want to see the attachment on your handheld device, select TEXT ONLY under INSERT AS, otherwise select ATTACHMENT. If you insert the email as TEXT ONLY, any attachments to the email will not be included.
6. Click OK, and the message will appear as an icon or text in the appointment or task.
7. Click Save and Close to save the changes to the ACTION.
8. Delete or file the original email from the Inbox.

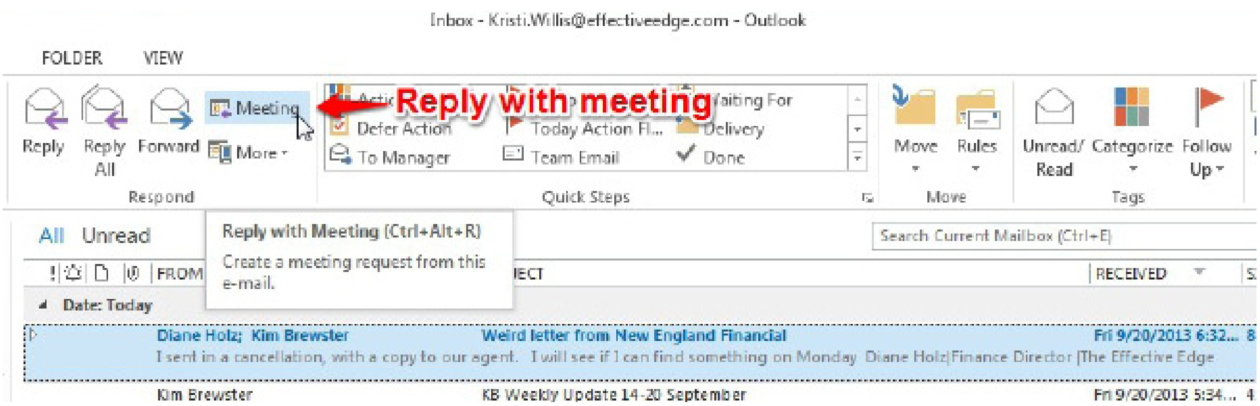
Creating a Quick Step Shortcut



TO CREATE A QUICK STEP SHORTCUT:

1. From the mailbox, click on the HOME tab.
2. In the QUICK STEPS box, click the CREATE NEW button.
3. In the NAME text box, enter Defer Task.
4. Click the down arrow next to the Actions list and choose CREATE A TASK WITH ATTACHMENT from the menu.
5. Click the ADD ACTION button.
6. Select DELETE MESSAGE from the menu.
7. Click Finish.
8. To create a second Quick Step to defer items to the Calendar:
   a. In the QUICK STEPS box, click the CREATE NEW button.
   b. In the NAME text box, enter Defer Calendar.
   c. Click the down arrow next to the Actions list and choose CREATE AN APPOINTMENT WITH ATTACHMENT from the menu.
   d. Click the ADD ACTION button.
   e. Select DELETE MESSAGE from the menu.
   f. Click Finish.

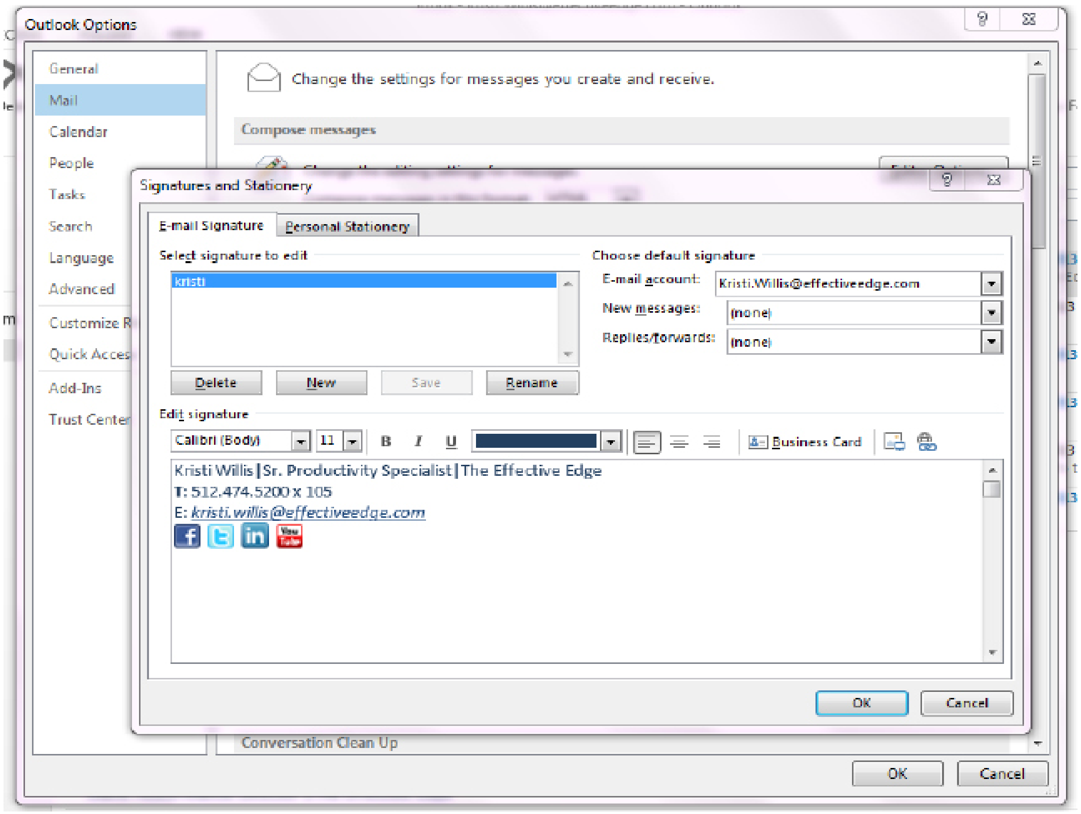
Creating a Meeting from an Email



TO CREATE A MEETING FROM AN EMAIL USING REPLY MEETING:

1. Open the email for which you want to schedule a meeting.
2. Click the REPLY MEETING button on the ribbon.
3. Add recipients in the To: line and modify the subject or location as necessary.
4. Use the Room Finder to select a date and time that works best for each of the recipients. The color coding shows you which dates work best. Use the Suggested Times list to determine when participants might have conflicts. If the Room Finder does not display automatically, click the Room Finder button on the ribbon.
5. Click the SEND button to send the meeting request.

Creating an Email Signature



TO CREATE A SIGNATURE:

1. Click on the FILE tab and choose OPTIONS from the menu.
2. Click on the MAIL option and click the SIGNATURES button.
3. Click the NEW button and enter a name for the signature.
4. Enter the signature contents in the EDIT SIGNATURE text box and click OK.