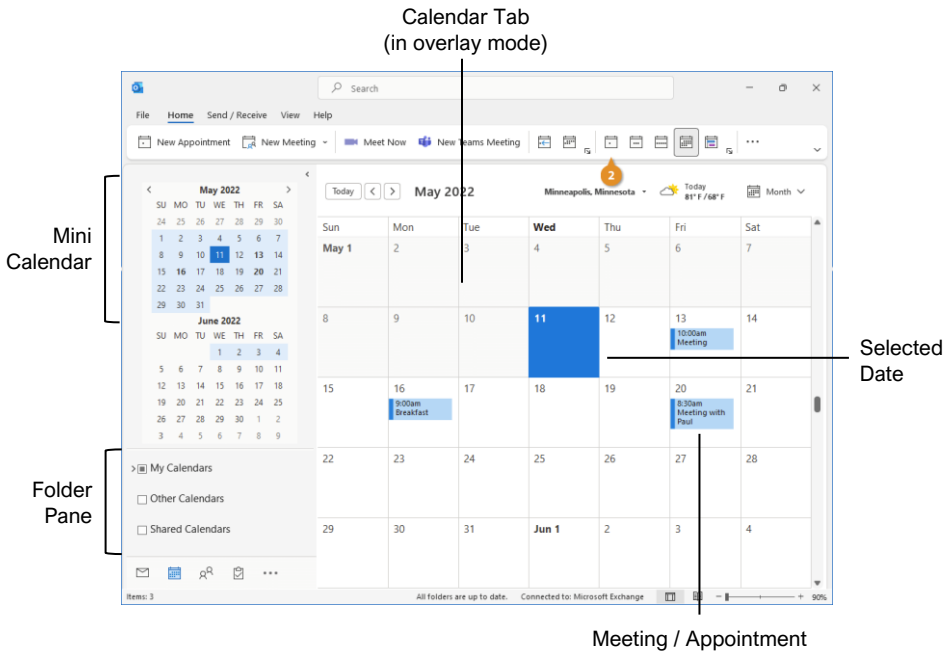
Outlook Intermediate

Cheat Sheet

CustomGuide

Outlook Calendar View



Tasks and Notes

Flag a Message: In Mail view, select an item, click the **Follow Up** button on the Home tab, then select a flag; or, right-click a message, select **Follow Up**, and select a flag.

Change a Flag: In Mail view, select a flagged item, click the **Follow Up** button on the Home tab, then select a new flag.

Add a Reminder: In Mail view, select an item, click the **Follow Up** button on the Home tab, and select **Add Reminder**. Choose a date, time, and sound in the Reminder section of the Custom dialog box, then click **OK**.

Remove a Flag: In Mail view, select a flagged item, click the **Follow Up** button on the Home tab, and select **Clear Flag**.

Add a Task: Switch to Task view by clicking **Tasks** on the Navigation bar, then click the **New Task** button on the Home tab (or click the **New Items** button on the Home tab, then select **New Task**). Enter a subject, start date, due date, and other options, then click **Save & Close**.

Mark a Task Complete: In Task view, check a task's check box; or, select a task and click the **Mark Complete** button on the Home tab.

View Tasks in the To-Do Bar: Click the **View** tab on the ribbon, click the **To-Do Bar** button, and select **Tasks**.

Change Task Views: In Task view, click the **Change View** button on the Home tab (or, if available, select a view from the Views gallery).

Create a Recurring Task: When creating a new task, click the **Recurrence** button on the Task tab. Specify a recurrence pattern, then set the recurrence pattern's date range. Click **OK**.

- **Daily** tasks recur every day, every set number of days, or every weekday.
- **Weekly** tasks recur on the same day of the week every week, or every certain number of weeks.
- **Monthly** tasks recur on the same day of the month (the 10th), or the same day of a specified week of the month (the third Friday).
- **Yearly** tasks recur annually on the same day of a month every year (July 8th), or the same weekday in a specified week and month (the second Tuesday of April).

Remove Recurrence: After opening a task with recurrence, click the **Recurrence** button on the Task tab and click **Remove Recurrence**.

Advanced Calendar

Schedule Meeting Rooms: In a new meeting window, click the **Rooms** button, select a meeting room from the address book, click the **Rooms** button, and click **OK**.

Forward a Calendar Item: Open a calendar item, click the **Forward** button on the Meeting tab, enter a contact in the To: field, then click **Send**.

Send Calendar Information: Click and drag a meeting or an appointment and drop it on the Mail Navigation Bar option. In the message window that opens, add a recipient in the To field and click the **Send** button.

Access a Shared Calendar: Expand the Manage Calendars group. Click the **Add Calendar** button, select **Open Shared Calendar**, enter another user's name (or click **Name** and select a user from the address book), then click **OK**.

Send a Calendar Sharing Invitation: Expand the Manage Calendars group. Click the **Share Calendar** button and select the calendar you want to share from the list. To share the calendar, click the **Add** button, select a contact, and click **OK**.

Send your Calendar in an Email: Click the **Email Calendar** button on the Home tab, select a calendar and date range, and click **OK**.

Add New Calendars: Expand the Manage Calendars group. Click the **Add Calendar** button and select **Create New Blank Calendar**, give the calendar a name, and click **OK**.

View Multiple Calendars: Check or uncheck a calendar's check box in the Folder pane to toggle it on and off.

Overlay Calendars: While viewing multiple calendars, click the **Overlay** arrow on a calendar tab.

Delete a Calendar: Right-click a calendar tab (or a calendar in the Folder pane) and select **Delete Calendar**.

Configure Calendar Settings: Click the **File** tab and select **Options** at the left. In the Outlook Options dialog box that appears, select **Calendar**. Customize the calendar settings and click **OK**.

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Tasks and Notes

Assign a Task: When creating a task, click the **Assign Task** button on the Task tab. Enter an email address in the To: field, then click **Send**.

Accept or Decline an Assigned Task: Select a task assignment request in your Mail inbox, then click either **Accept** or **Decline** in the message preview. Choose whether to edit the message response or not, and click **OK**.

View Notes: Click the **More (···)** button in the Navigation bar and select **Notes**. Double-click a note to open it.

Create a Note: While in Notes view, click the **New Note** button on the Home tab. Start typing within the note window, then click outside the note window to save it.

Advanced Mail

Run a Quick Step: Click a Quick Step in the Quick Steps gallery, or click the **More** button and select a Quick Step.

Add a New Quick Step: Click the **More** button in the Quick Steps gallery, then select **Create New**. Give the new Quick Step a name, then customize the actions that the Quick Step will take. Click **Finish**.

Edit a Quick Step: Click the **More** button in the Quick Steps gallery, then select **Manage Quick Steps**. Select a Quick Step, then click **Edit**. Update the Quick Step's actions, then click **Save**.

Create a Quick Part: Select the text or graphics you want to use as a Quick Part, click the **Insert** tab, click the **Quick Parts** button, and select **Save Selection to Quick Parts Gallery**. Give the Quick Part a name, category, and description, then click **OK**.

Use a Quick Part: While composing a message, click the **Insert** tab, click the **Quick Parts** button, and select a Quick Part.

Redirect Replies: While composing a message, click the **Options** tab, and click the **Direct Replies To** button. Click **Select Names**, select names from the address book, and click **OK**. Click **Close**.

Recall a Message: Click the **Sent Items** folder in the Folder pane, open a message, click the **Actions** button on the Message tab, and select **Recall this Message**. Select whether to just delete the message or to replace it with a new message, then click **OK**.

Send a Poll: In a new message window, click the **Options** tab, click the **Use Voting Options** button, and select a poll option (or select **Custom**, specify your own poll options, then click **Close**).

Track Votes: Click the **Sent Items** folder, open a message with a poll, and click the **Tracking** button on the Message tab.

Advanced Mail

Create a Rule Based on an Email: Select a message, click the **Rules** button on the Home tab, and select **Create Rule**. Select the conditions for the rule, then select the actions for the rule to carry out. Click **OK**.

Create a Rule from Scratch: Click the **Rules** button on the Home tab and select **Manage Rules & Alerts**. Click **New Rule** and use the Rules Wizard to set conditions, actions, and exceptions. Give the rule a name, select how you want it to run, and click **Finish**.

Edit a Rule: Click the **Rules** button on the Home tab and select **Manage Rules & Alerts**. Select a rule, click **Change Rule**, and select **Edit Rule Settings**. Use the Rules Wizard to edit the rule's conditions, actions, and exceptions, then click **Finish**.

Delete a Rule: Click the **Rules** button on the Home tab, select **Manage Rules & Alerts**, select a rule, click **Delete**, and click **Yes**.

Save an Email in Another Format: Double-click an email to open it, then click the **File** tab and select **Save As**. Select where you want to save the email, then click the **Save as type** list arrow and select a file type. Click **Save**.

Delegate Mail Folders: Click the **File** tab, click **Account Settings**, and select **Delegate Access**. Click **Add**, select a contact from the address book, click **Add**, then click **OK**. Select the permissions for the delegated user, then click **OK**. Click **OK** again.

- **Reviewer** permissions allow the user to read items and files, but not create or edit them.
- **Author** permissions allow the user to create and read items and files, and to modify and delete items they've created.
- **Editor** permissions allow the user to create, read, modify, and delete all items and files.

Access a Shared Folder: Click the **File** tab, click **Open & Export**, click **Other User's Folder**, enter another user's name (or click **Name** and select a user), then click **OK**.

Create an Email Using a Theme or Stationery: Click the **New Items** button on the Home tab, select **Email Message Using**, and select **More Stationery**. Select a theme or stationery in the dialog box, then click **OK**.

Add Additional Accounts: Click the **File** tab and click the **Add Account** button. Fill in the account information and click **Connect**. Click **Done**.

Specify Which Account Email is Sent From: While composing an email, click the **From** field list arrow and select an email account.

Manage Information

Categorize an Item: Select an item, click the **Categorize** button on the Home tab, and select a category.

Manage Information

Edit a Category: Click the **Categorize** button on the Home tab, select **All Categories**, and select a category. Click **Rename**, give the category a new name, and click **OK**. Click the **Color** list arrow and select a new color. Click **OK**.

Create a New Category: Click the **Categorize** button on the Home tab, select **All Categories**, and click **New**. Enter a name, select a color, and click **OK**.

Delete a Category: Click the **Categorize** button on the Home tab, select **All Categories**, select a category, click **Delete**, and click **OK**.

Sort Inbox by Category: Click the **sort by** list arrow above the Inbox and select **Categories**.

Create a Folder: Click the Folder tab, click the **New Folder** button, enter a name, select a type of content, select a location, and click **OK**.

Rename a Folder: Select a folder in the Folder pane, click the **Folder** tab, and click the **Rename Folder** button. Enter a new folder name and press **Enter**.

Move a Folder: Select a folder in the Folder pane, click the **Folder** tab, and click the **Move Folder** button. Select a new location, then click **OK**.

Delete a Folder: Select a folder in the Folder pane, click the **Folder** tab, and click the **Delete Folder** button. Click **Yes** to confirm.

Create a Search Folder: Click the **Folder** tab and click the **New Search Folder** button. Select **Create a Custom Search Folder**, click **Choose**, and select criteria for the search folder. Click **OK** in the three open dialog boxes.

Clean Up a Conversation: Select a conversation in the Inbox, click the **Clean Up** button on the Home tab, select **Clean Up Conversation**, then click **Clean Up**.

Clean Up a Folder: Select a folder, click the **Clean Up** button on the Home tab, select **Clean Up Folder**, then click **Clean Up Folder**.

Export Outlook Data: Click the **File** tab, click **Open & Export**, and click **Import/Export**. Select **Export to a file** and click **Next**. Select a file type and click **Next**. Select a folder to export data from and click **Next**. Specify where you want to save the exported file, and how you'd like to deal with duplicate items, and click **Finish**. Add an optional password and click **OK**.

Import Data into Outlook: Click the **File** tab, click **Open & Export**, and click **Import/Export**. Select **Import from another program or file** and click **Next**. Select a file type to import and click **Next**. Click **Browse** and specify a file, choose how to handle duplicate items, and click **Next**. If necessary, select a folder from the file to import, and click **Finish**.

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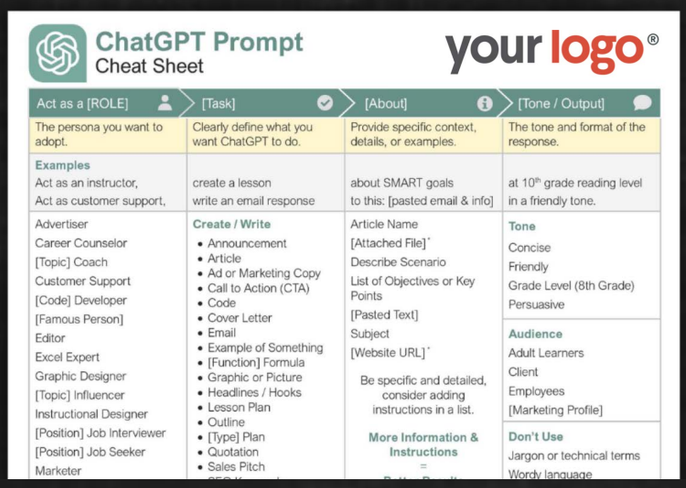

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