



Microsoft®

# Outlook 2016 Intermediate Quick Reference Guide



## Outlook 2016 Calendar View

## Advanced Calendar

Calendar Tab (in overlay mode)

Mini Calendar

Folder Pane

Selected Date

Meeting / Appointment

**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**.

**Use the Scheduling Assistant:** Create a meeting with all invitees. Click **Scheduling Assistant** on the Home tab and select a time that works for all.

**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:** Click the **Open Calendar** button on the Home tab, select **Open Shared Calendars**, enter another user's name (or click **Name** and select a user from the address book), then click **OK**.

**Send a Calendar Sharing Invitation:** Click the **Share** button on the Home tab, enter a contact in the To: field, click the **Details** list arrow and select a level of detail, and click **Send**.

**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:** Click the **Open Calendar** button on the Home tab, 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**.

## 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 Item** 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 10<sup>th</sup>), 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 8<sup>th</sup>), 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**.

## 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** 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, 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, 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 **Next**. Click **Finish**.

**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**.

# CustomGuide

Get More Free Quick References!

Visit [ref.customguide.com](http://ref.customguide.com) to download.



## Office 365

- [Access](#)
- [Excel](#)
- [Office 365](#)
- [OneNote](#)
- [Outlook](#)
- [PowerPoint](#)
- [Teams](#)
- [Word](#)

## G Suite

- [Classroom](#)
- [G Suite](#)
- [Gmail](#)
- [Google Calendar](#)
- [Google Docs](#)
- [Google Drive](#)
- [Google Sheets](#)
- [Google Slides](#)

## OS

- [Mac OS](#)
- [Windows 10](#)

## Productivity

- [Digital Literacy](#)
- [Salesforce](#)

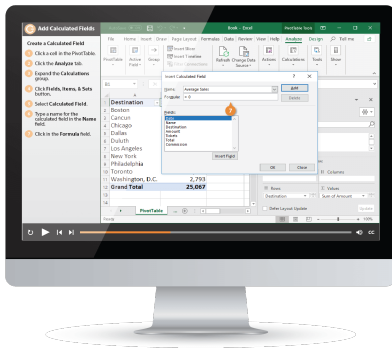
## Soft Skills

- [Business Writing](#)
- [Email Etiquette](#)
- [Manage Meetings](#)
- [Presentations](#)
- [Security Basics](#)
- [SMART Goals](#)

+ more, including [Spanish versions](#)

## Loved by Learners, Trusted by Trainers

Please consider our other training products!



### Interactive eLearning

Get hands-on training with bite-sized tutorials that recreate the experience of using actual software. SCORM-compatible lessons.



### Customizable Courseware

Why write training materials when we've done it for you? Training manuals with unlimited printing rights!

## Over 3,000 Organizations Rely on CustomGuide



“The toughest part [in training] is creating the material, which CustomGuide has done for us. Employees have found the courses easy to follow and, most importantly, they were able to use what they learned immediately.”

Contact Us!

[sales@customguide.com](mailto:sales@customguide.com)

612.871.5004