



Outlook 2013: Managing Outlook

## E-mail Accounts

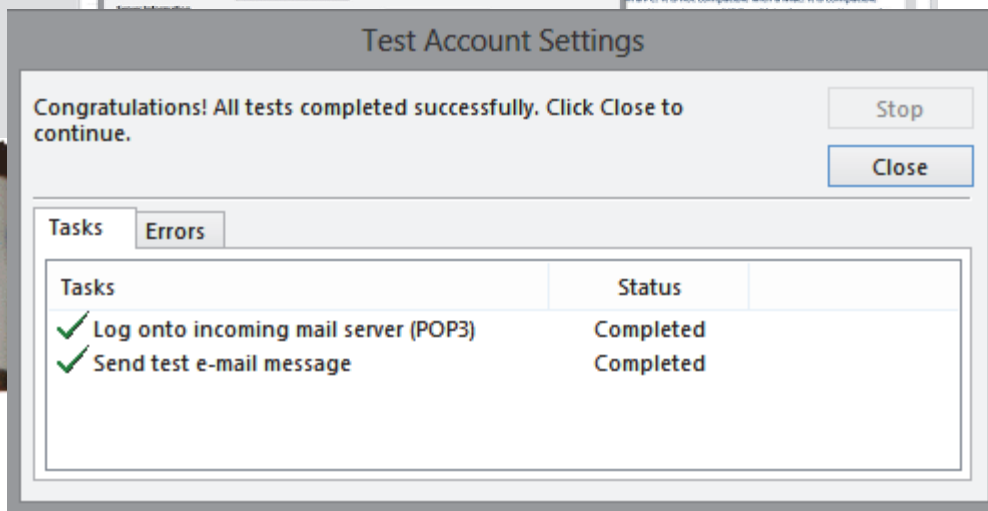
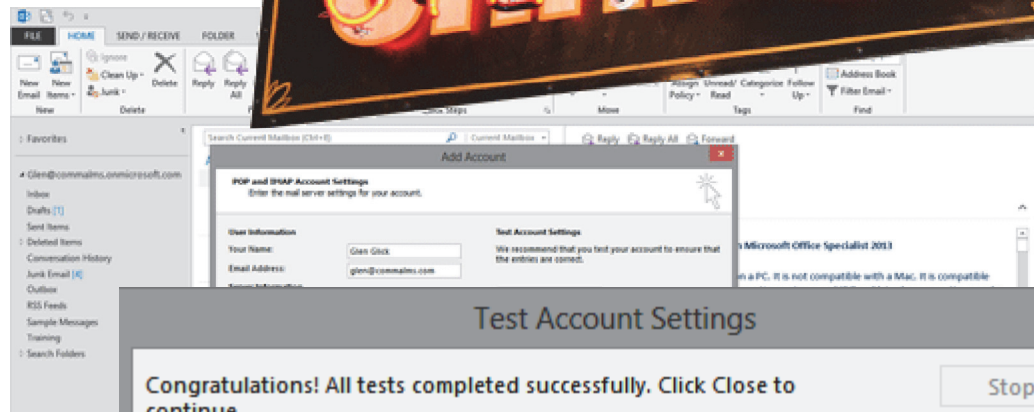
### Advanced Outlook Objectives

In this lesson, you will learn how to:

1. Add a new E-mail Account to Outlook.
2. Test the Account Settings and troubleshoot errors.
3. Find and backup the Outlook Data File.
4. Use the Advanced options to set up AutoArchive.
5. Review and manage the Send/Receive Groups.



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## Lesson 12: E-mail Accounts

### 1. Readings

Read Lesson 12 in the Microsoft Outlook guide, page 341-363.

### Project

Step-by-step demonstration of how to set up an E-mail account in Microsoft Outlook.

### Downloads

There are no downloads for this lesson.

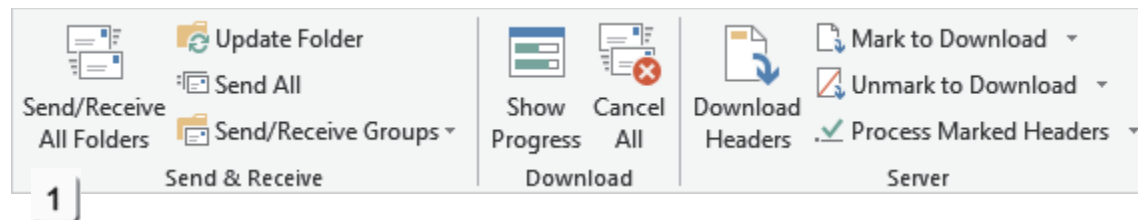
### 2. Practice

There is no Practice Activity for this lesson.

### 3. Assessment

Review the Test questions on page 364.

#### Send/Receive Ribbon



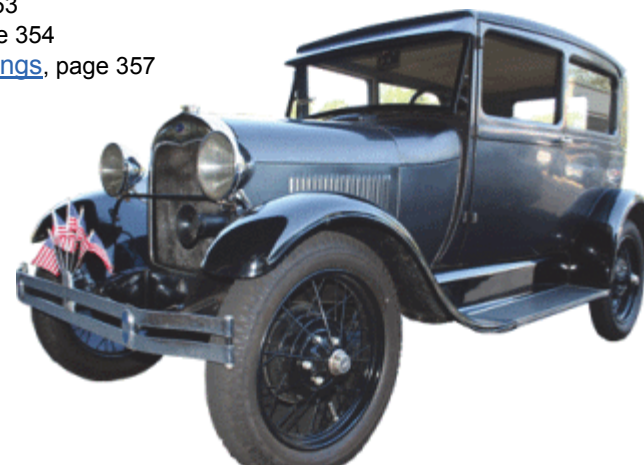
#### Menu Maps

From the **File Ribbon**.

1. [File ->Info->Add Account](#), page 344
2. [File ->Info->Account Settings-> E-mail](#), page 353
3. [File ->Info->Account Settings->Data Files](#), page 354
4. [File ->Options-> Advanced->AutoArchive Settings](#), page 357

From the **Send/Receive Ribbon**

1. [Send/Receive->Send & Receive](#), page 359

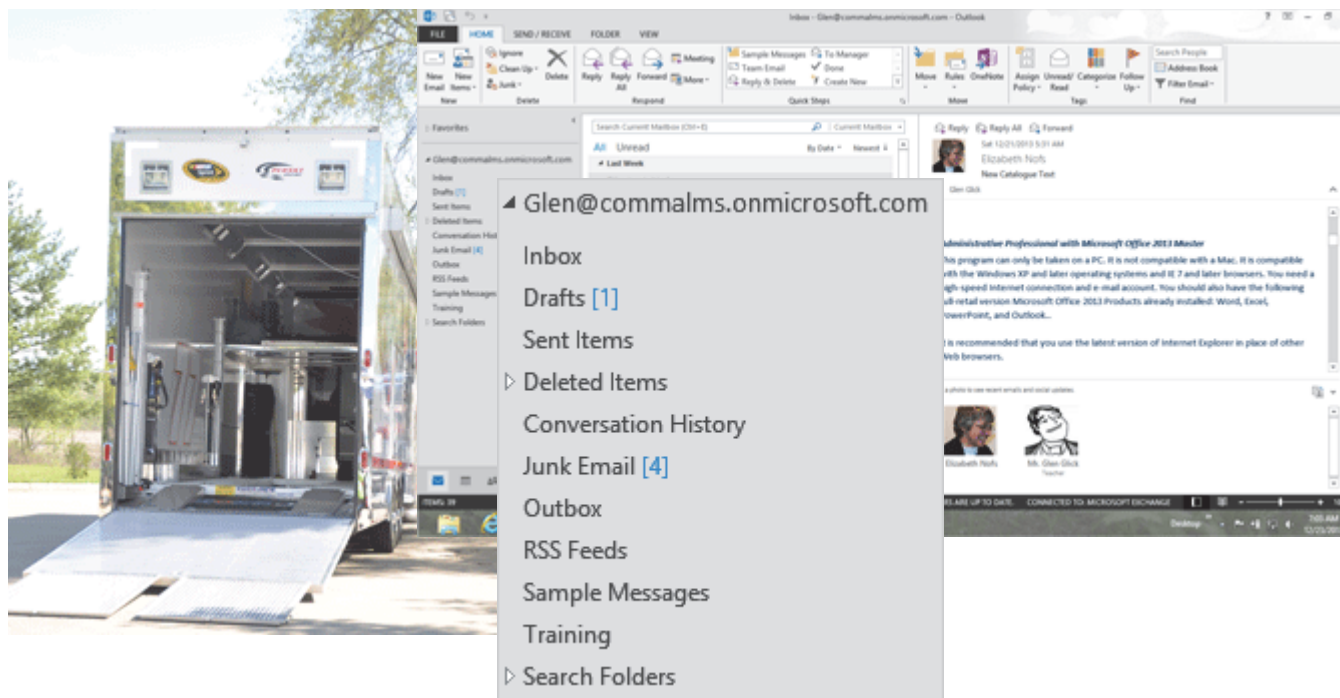




## Setting up the E-mail Accounts

Without an E-mail account, the Inbox is just a Dead Letter Box. Microsoft Outlook needs to connect to the Internet and access an E-mail server to download your messages. There are two parts to this process: gathering information about your E-mail Account and entering that information into Outlook. Not all E-mail Accounts work with Outlook.

The following pages show, in general, how to set up an E-mail Account and test the settings. Some questions may need to be addressed by your E-mail provider. That said, let's get started.



*The Theme for this lesson is  
"Back up the truck!"*

*The data is the most important  
aspect of any computer.*

*Hardware comes and  
hardware goes.*

*Back up your files!*





## Before You Begin

The **Account Information** and **Account Settings** can be found in the Microsoft Outlook **Backstage**.

**1. Try it: Find the Account Information**  
Go to **File->Info**.

**What Do You See?** If Outlook is set up to send and receive E-mail, the Account Information will be listed. In the example on this page, the Account is for [glen@commalms.onmicrosoft.com](mailto:glen@commalms.onmicrosoft.com)

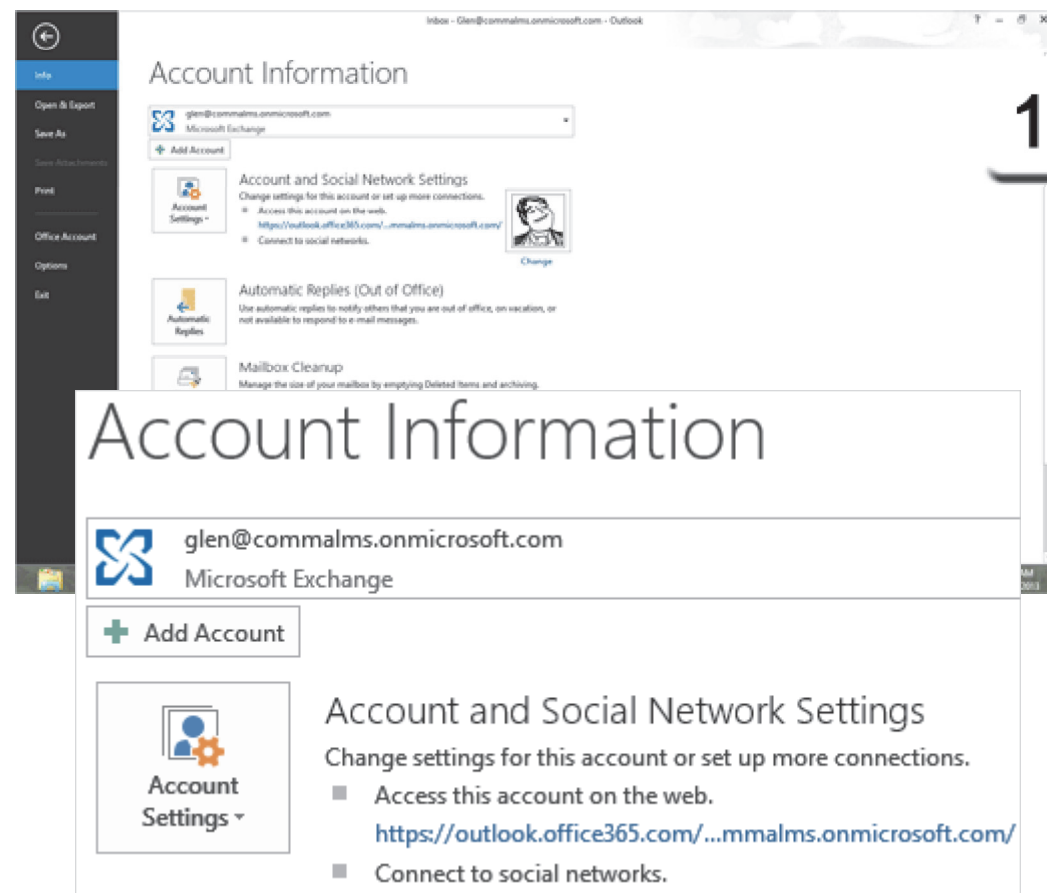
**What Else Do You See?** There is a button to **Add Account**.

**Try This, Too: Add an Account**  
Go to **File ->Info**.  
Click on **Add Account**.

Keep going...

**Memo to Self:** The SAMPLE E-mail address, [teacher@commalms.com](mailto:teacher@commalms.com), is for show and tell, only. Please use your own E-mail address to set up an account in Microsoft Outlook.

File ->Info->Add Account







## Add an Account

### 2. Try it: Add an E-mail Account

When you create a new E-mail account, you will be prompted to identify yourself: Name, E-mail Address and Password.

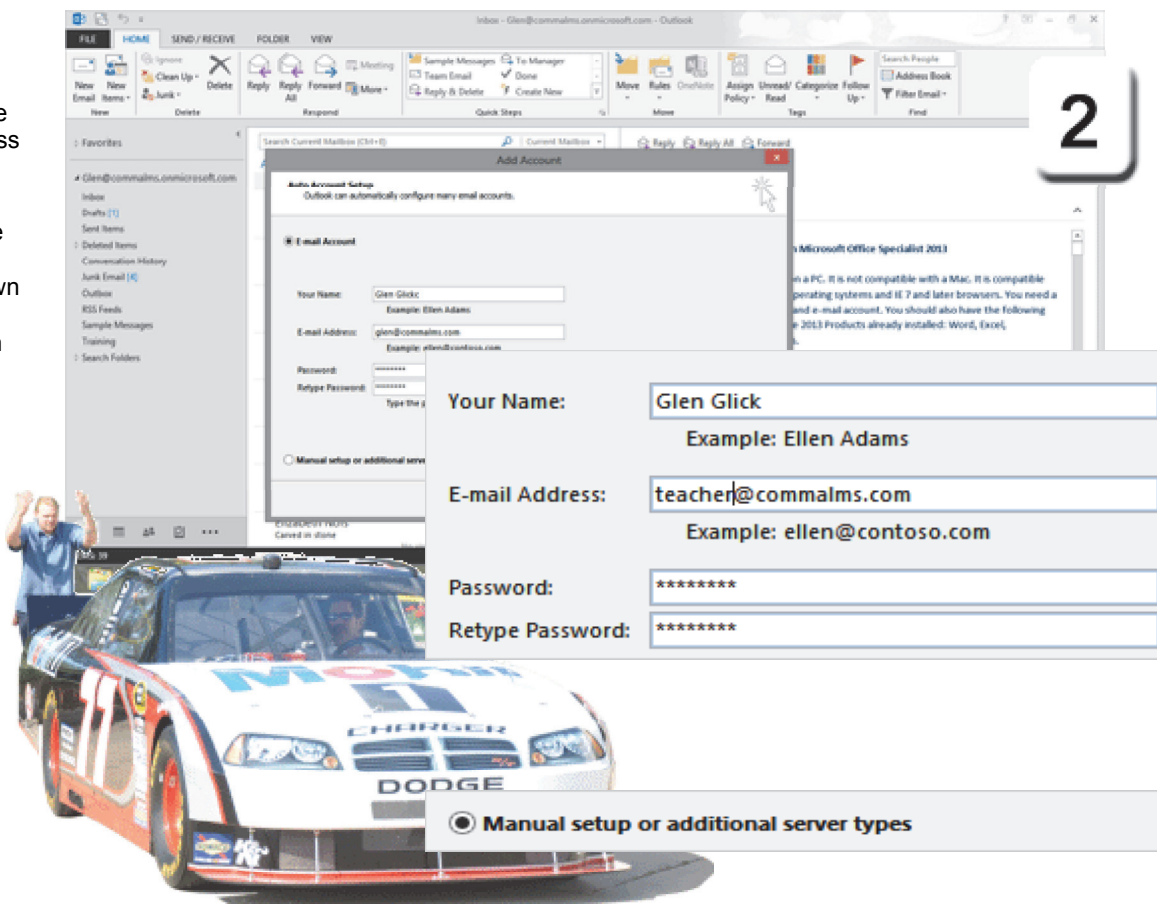
If you click Next, Microsoft Outlook will try to locate your E-mail server. This may or may not be successful. Instead, please consider doing your own homework and entering the data yourself. Homework is defined by looking up the information about your E-mail provider.

Say you get your E-mail from AOL, MSN, Charter, etc. You can go to that company's website to find the Outlook Account Settings.

Go to **Manually configure server settings**. Click **Next**.

Keep going...

File -> Info -> Add Account



Exam 77-423: Microsoft Outlook 2013  
 1.0 Manage the Outlook Environment  
 1.3 Print and Save Information in Outlook: Create Data Files (Add a New Account)



## Choose a Service

### 3. Try it: Choose a Service

When you choose to manually configure a new E-mail account, Microsoft Outlook walks you through the steps with a little wizard.

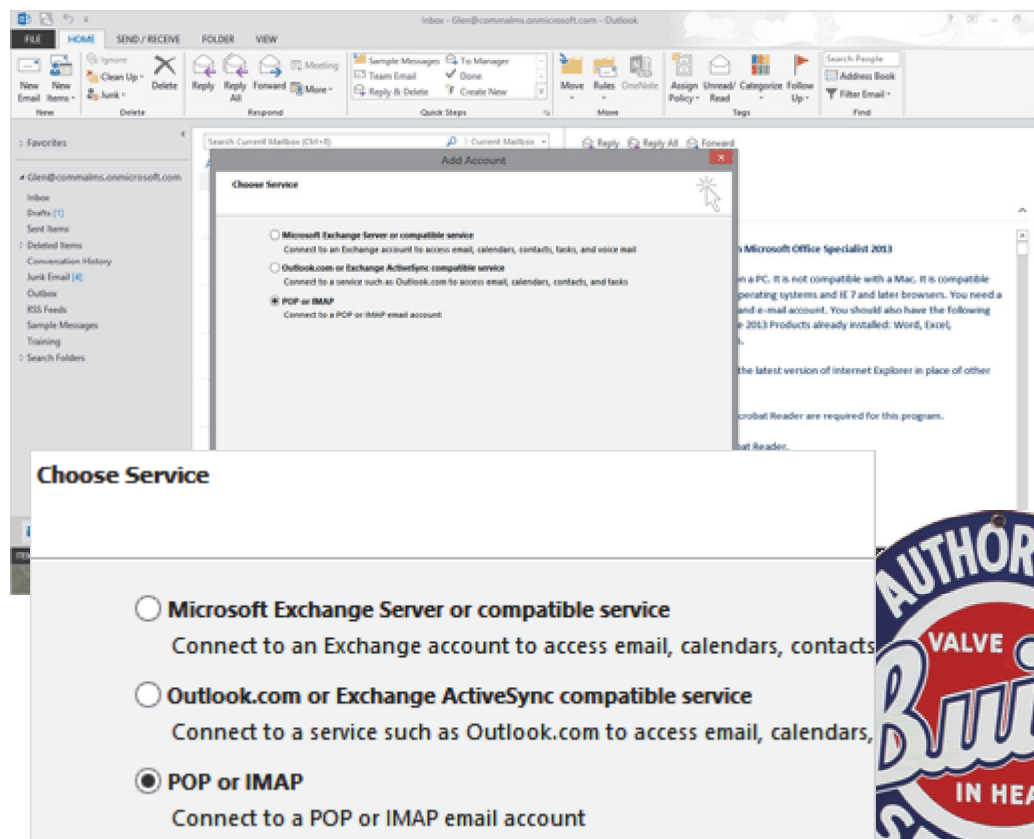
The first question asks how you will connect to your E-mail. The choices for Service are:

Microsoft Exchange Server (a corporate server)  
Outlook.com or Exchange ActiveSync  
POP or IMAP (Internet E-mail server)

**Choose a Service:** Internet E-mail.  
Click **Next**.

Keep going...

File ->Info->Add Account



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## Internet E-mail Settings

These settings are required to connect to your Server, identify yourself, and download your messages. The Server information comes from whomever is your E-mail provider.

### 4. Try it: Edit the Internet E-mail Settings The User Information

Your Name: This is how your name is displayed at the top of each E-mail.

E-mail Address: Please enter your address.

### The Server Information

Account Type: POP3

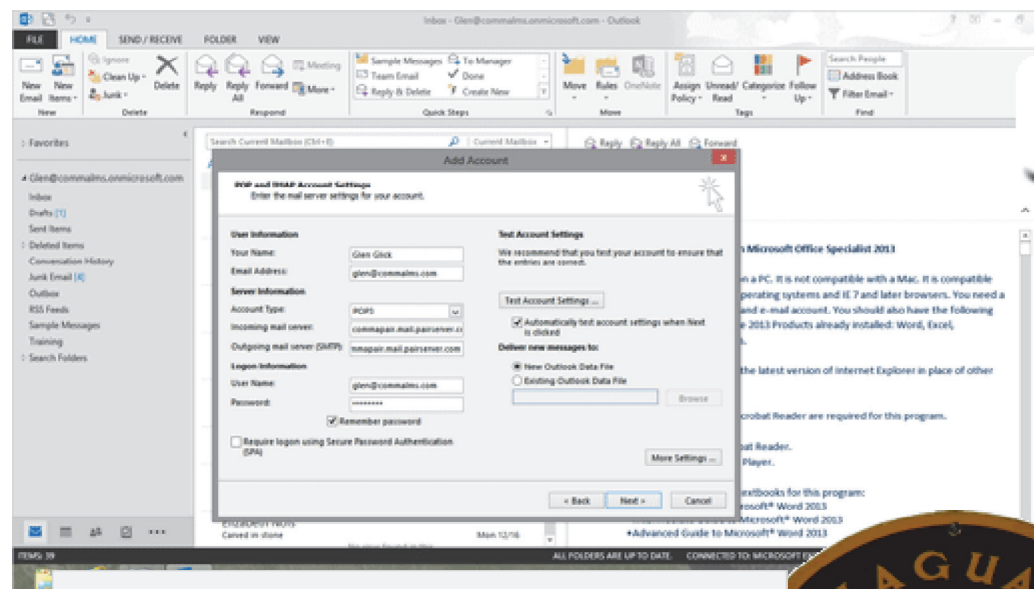
POP3 is a standard format so it is the default.

Incoming mail server and Outgoing mail servers may or may not be the same. The Incoming server may host your E-mail, while the Outgoing server may be your Internet Provider.

### The Logon Information

For many E-mail Servers, your User Name may be your E-mail address. There is a check mark to remember your password so that you do not have to enter it every time Outlook sends and receives.

File ->Info->Add Account



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Your Name:	Glen Glick
	Example: Ellen Adams
E-mail Address:	teacher@commalms.com
	Example: ellen@contoso.com
Password:	*****
Retype Password:	*****



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1.0 Manage the Outlook Environment  
1.3 Print and Save Information in Outlook: Create Data Files (Add a New Account)



## Create a New Data File

Outlook is a database. If this is the first time you have worked with Outlook, go to **Deliver new messages to** and create a **New Outlook Data File**.

If you are adding another E-mail Account to Outlook, you can deliver messages to an **Existing Outlook Data File**.

### 5. Try it: Create a New Data File

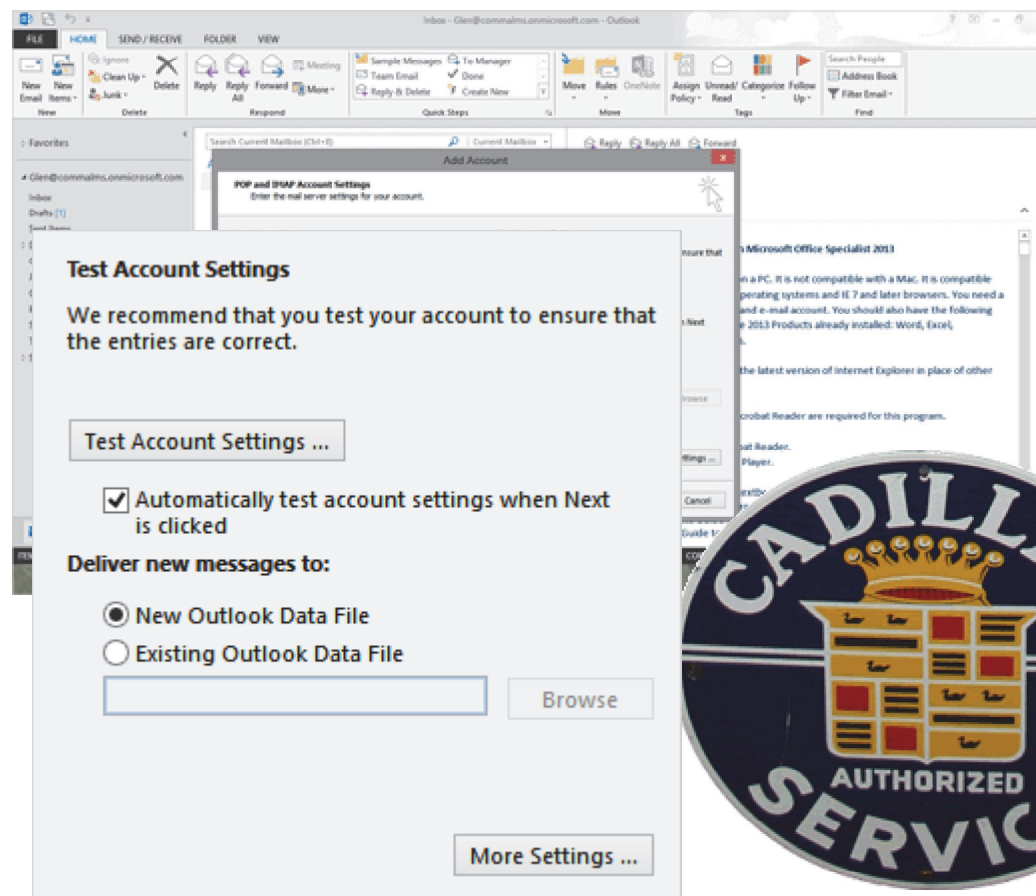
Go to Deliver new messages to:  
Click on **New Outlook Data File**.

**What Else Do You See?** In addition to the Account information (User Name, Password, Servers) there are More Settings you may need to edit for Security.

**Try This, Too: Go to More Settings**  
Click on **More Settings**.

Keep going...

File ->Info->Add Account



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Exam 77-423: Microsoft Outlook 2013  
1.0 Manage the Outlook Environment  
1.3 Print and Save Information in Outlook: Create Data Files



## More Account Settings

There are three additional Tabs: General, Outgoing Server, and Advanced. The General Tab lets you edit the name of the Mail Account. You can also add the Organization and Reply E-mail if you wish.

Let's look at the Outgoing Server options.

### 6. Try it: Edit the Outgoing Server

Go to **Outgoing Server**.

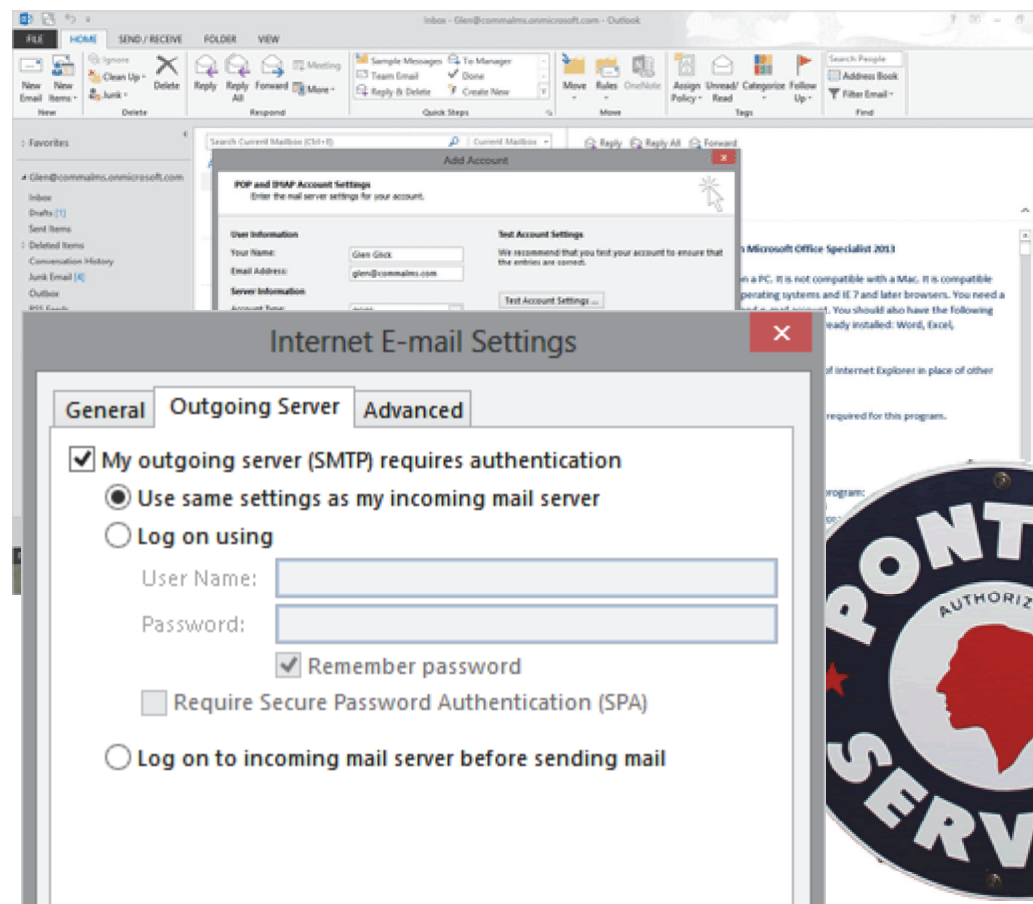
Select: My outgoing server (SMTP) requires authentication.

If the Outgoing server is the same as the Incoming mail server, you can use the same settings for the User Name and Password. If the two servers are different, you can click on Log on using and enter a different User Name and Password.

Keep going...

**Memo to Self:** SMTP means Simple Mail Transfer Protocol. It is a protocol that goes back a looooong time ago, perhaps as far back as 1982.

File -> Info -> Add Account



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 1.0 Manage the Outlook Environment  
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## Advanced Server Settings

The Advanced Server Settings can be edited for enhanced security. This information is usually provided by the company who is hosting your E-mail account.

### 7. Try it: Review the Advanced Settings

Go to **Advanced->Server Port Numbers**. Edit the Incoming server (POP3): the default is 110, however secure servers may use 995.

Edit the Outgoing server (SMTP): the default is 25, but secure servers may use 465.

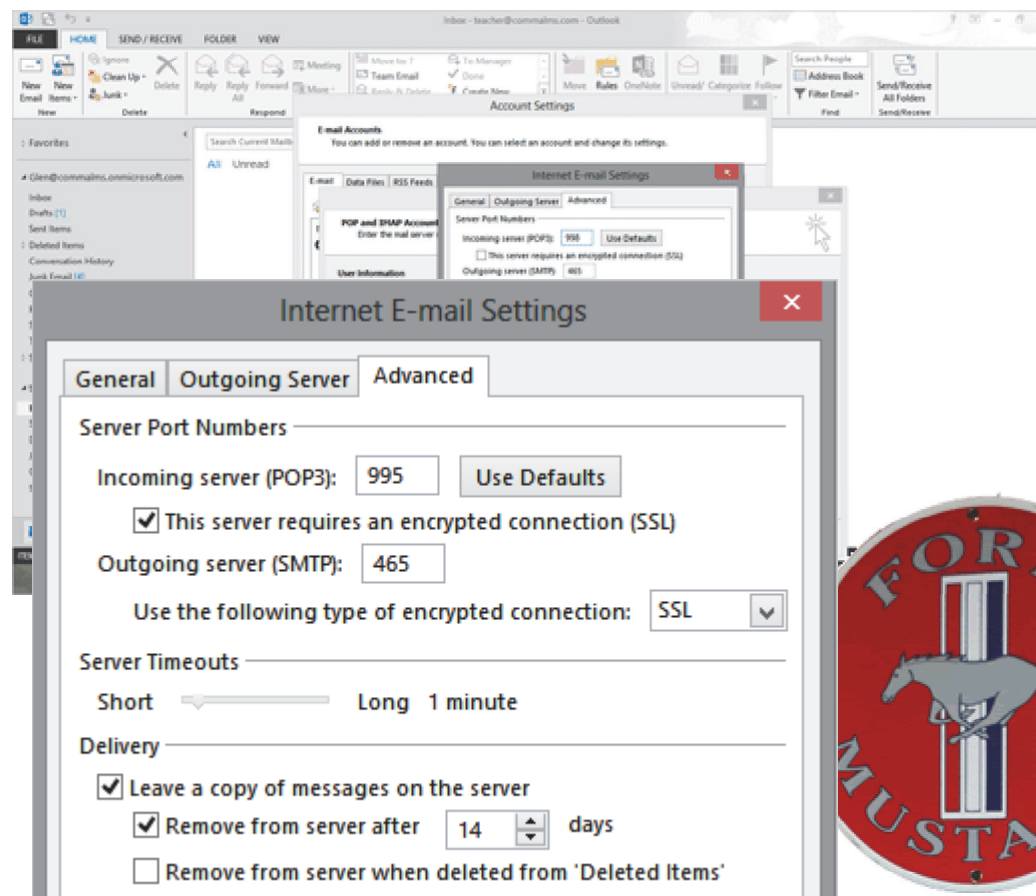
Both the Incoming and Outgoing server need an encrypted connection: SSL.

**What Else Do You See?** Look under Delivery. There are more options for handling E-mail. You can **Leave a copy of the messages on the server**. You can specify how long you want the messages to remain on the server.

You can also choose to Remove messages from the Server after you delete them from the Deleted Items (Empty the Trash) in Outlook.

Click **OK** to keep these settings. Keep going...

File ->Info->Add Account



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1.0 Manage the Outlook Environment  
1.3 Print and Save Information in Outlook: Advanced Server Settings





## Test the Account Settings

Test, test, test. Confirm that these Internet E-mail Settings work for you.

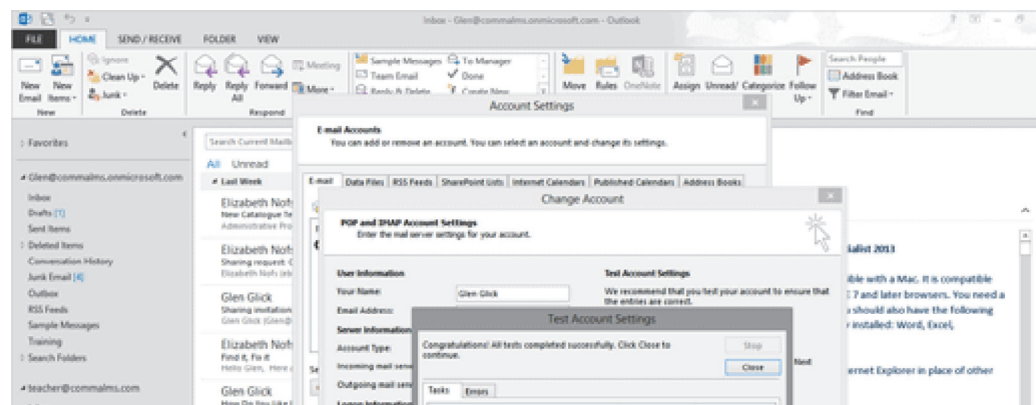
### 8. Try it: Test the Account Settings

When you test the Account Settings Outlook logs into the incoming POP3 mail server and sends a test E-mail message. When both Tasks are completed you will see a little confirmation notice.

Click **Close** to finish the Test and return to the Account Settings. Keep going...



File ->Info->Add Account



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## What If It Doesn't Work?

### 9. What If It Doesn't Work?

The test will indicate if the Task failed. Look for the clues. In the example on this page, the Log into the server failed.

So, how would you find the error and fix it? Click **Close** to go back to the Account Settings and check:

The spelling of the User Name

The spelling of the Password

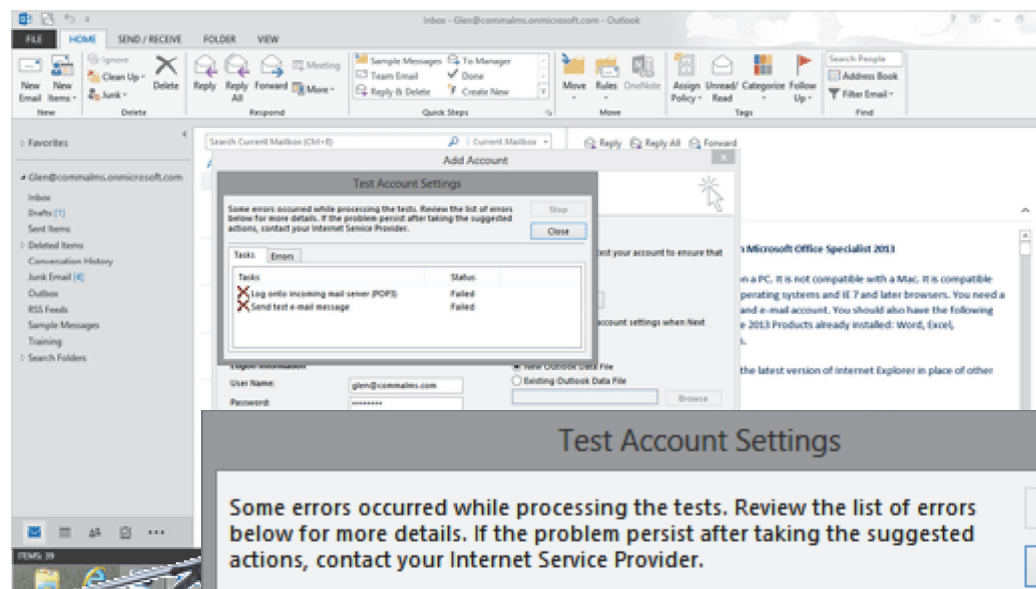
The spelling of the incoming mail server

Then click on **Test Account Settings** again to confirm that it works, now.

So far, so good...



File ->Info->Add Account



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## Review the Account Settings

You can edit your E-mail Account if you wish. You can add or remove E-mail Accounts as well.

Here is the pathway back to the Account Settings.

### 1. Try it: Review the Account Settings

Go to **File -> Info -> Account Settings**.

**What Do You See?** The E-mail Accounts are listed by Name and Type. The options include:

New

Repair

Change

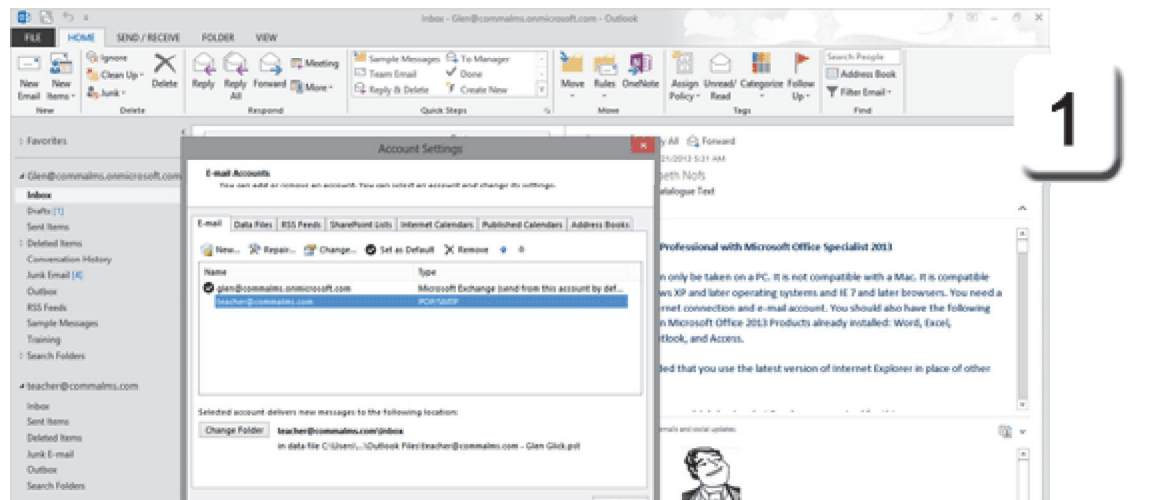
Set as Default (if you have more than one)

Remove

Keep going...



**File -> Info -> Account Settings -> E-mail**



**E-mail Accounts**  
You can add or remove an account. You can select an account and change its settings.

**E-mail** | Data Files | RSS Feeds | SharePoint Lists | Internet Calendars | Published Calendars | Address Books

New... Repair... Change... Set as Default Remove Up Down

Name	Type
glen@commalms.onmicrosoft.com	Microsoft Exchange (send from this account by def...
teacher@commalms.com	POP/SMTP

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 1.0 Manage the Outlook Environment  
 1.1 Customize Outlook Settings: Manage Multiple Accounts





## Find the Data Files

Microsoft Outlook is a **database**.  
So, where is the data files?

**2. Try it: Review the Data File Options**  
Go to the **Data Files** tab, please.

**What Do You See?** The options are similar to the ones on the E-mail tab:

Add

Settings

Set as Default (if you have more than one)

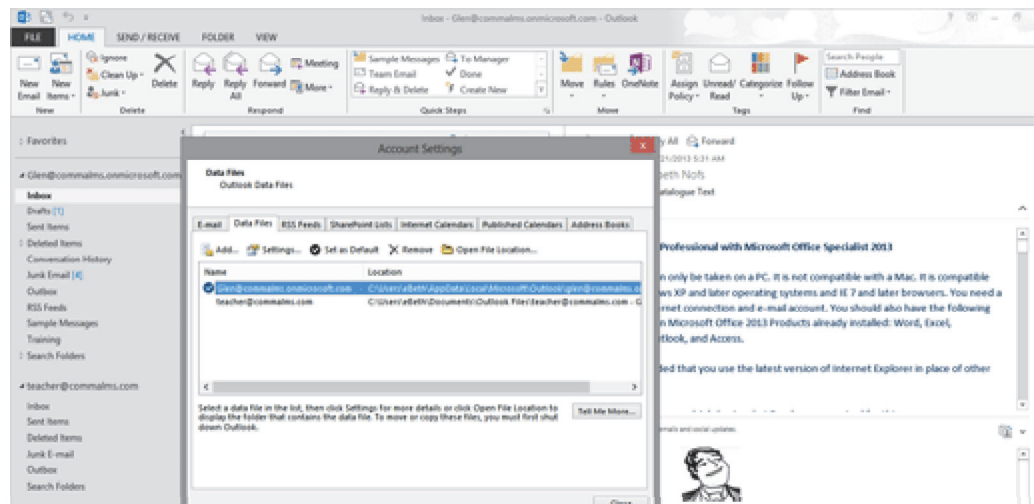
Remove

Open File Location

Keep going...



File -> Info -> Account Settings -> Data Files



### Data Files

#### Outlook Data Files

E-mail Data Files RSS Feeds SharePoint Lists Internet Calendars Published Calendars Address Books

Add... Settings... Set as Default Remove Open File Location...

Name	Location
Glen@commalms.onmicrosoft.com	C:\Users\eBeth\AppData\Local\Microsoft\Outlook\glen@commalms.com
teacher@commalms.com	C:\Users\eBeth\Documents\Outlook Files\teacher@commalms.com

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1.0 Manage the Outlook Environment  
1.1 Customize Outlook Settings: Manage Multiple Accounts (Data Files)





## Open File Location

### 3. Try it: Find the Data File

The Account Settings are open.

The Data File tab is selected.

Click on **Open File Location**.

**What Do You See?** The POP3 Data file is a \*.pst file. You can confirm that it is the \*real\* database by looking at the file properties. The **Date modified** should be recent (perhaps today) and the **File size** may get rather large if you save pictures and attachments.

### Do This: Copy the Data File

This is the actual database...

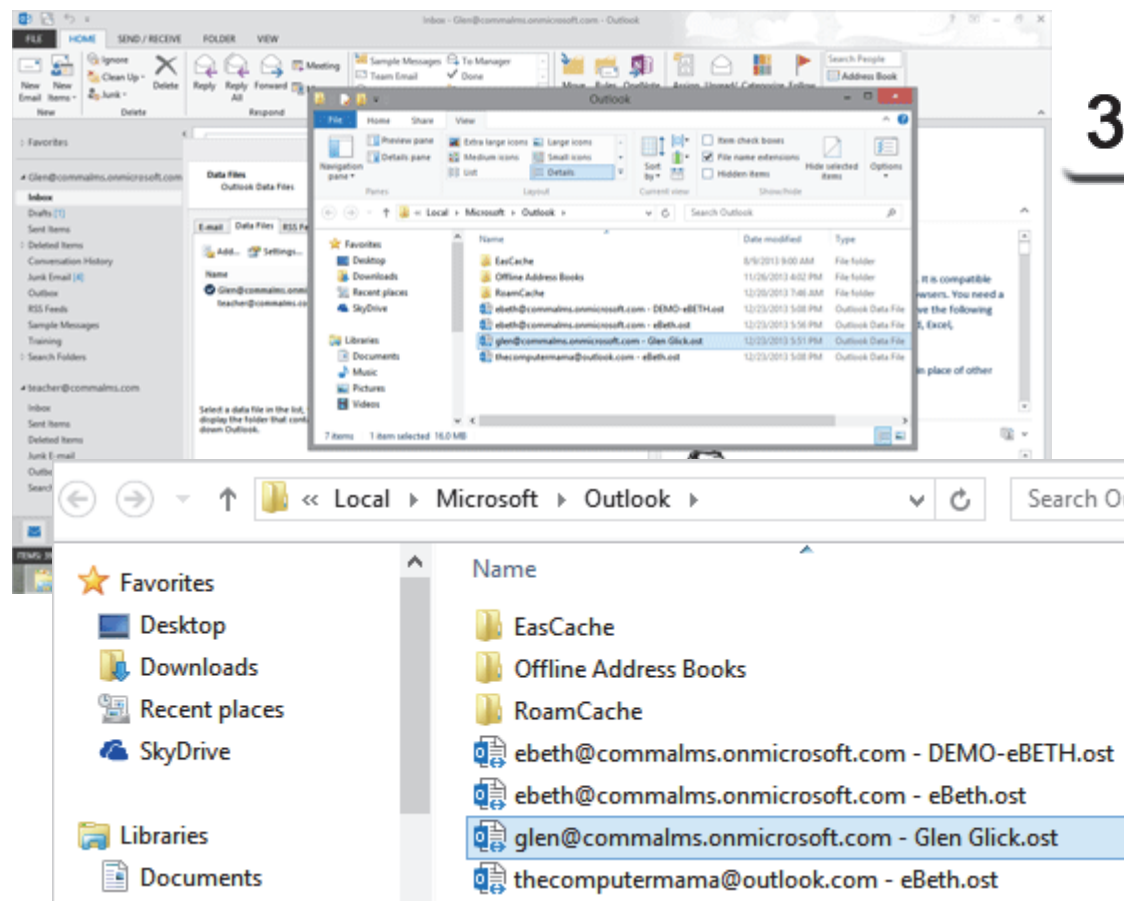
and this is the file you want to backup.

Please write down the location so you can copy and paste this file to your backup drive or memory stick.

Close the folder with your Outlook files. The Account Settings should be open.

Keep going...

## File ->Info->Account Settings->Data Files



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## Data File Settings

All databases need to be maintained and compacted. When you **Compact** a database you reduce the size and make it run faster.

### 4. Try it: Compact the Data File

The Account Settings are open.  
The Data File tab is selected.  
Click on **Settings**.

**What Do You See?** You can edit the following:

Name  
Filename  
Format

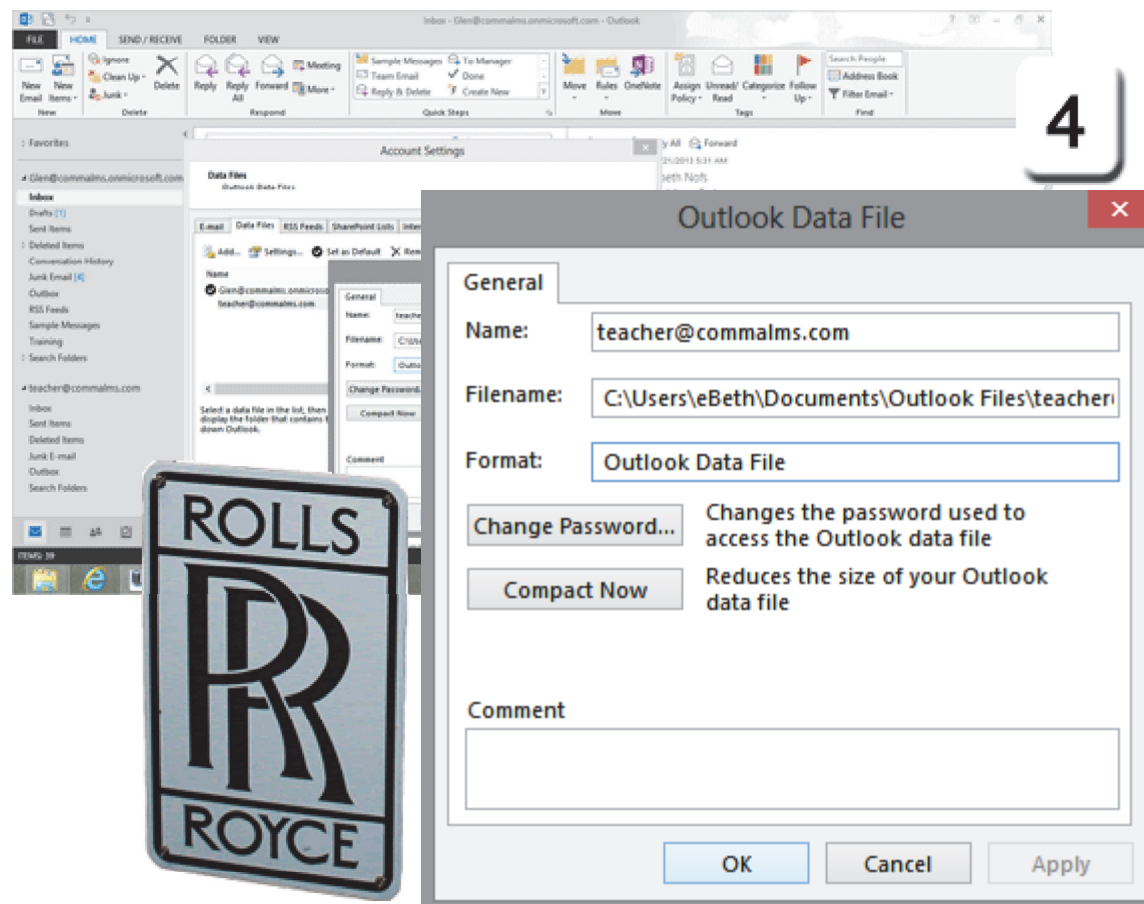
**What Else Do You See?** The options include:

Change Password  
Compact Now

Click **Compact Now**.

Click **OK** to close this window when it is done.

File -> Info -> Account Settings -> Data Files



Exam 77-423: Microsoft Outlook 2013  
1.0 Manage the Outlook Environment  
1.1 Customize Outlook Settings: Manage Multiple Accounts (Data File Settings)



## AutoArchive

There is another data management task we should discuss: archiving. You can program Microsoft Outlook to **archive** old items from the database.

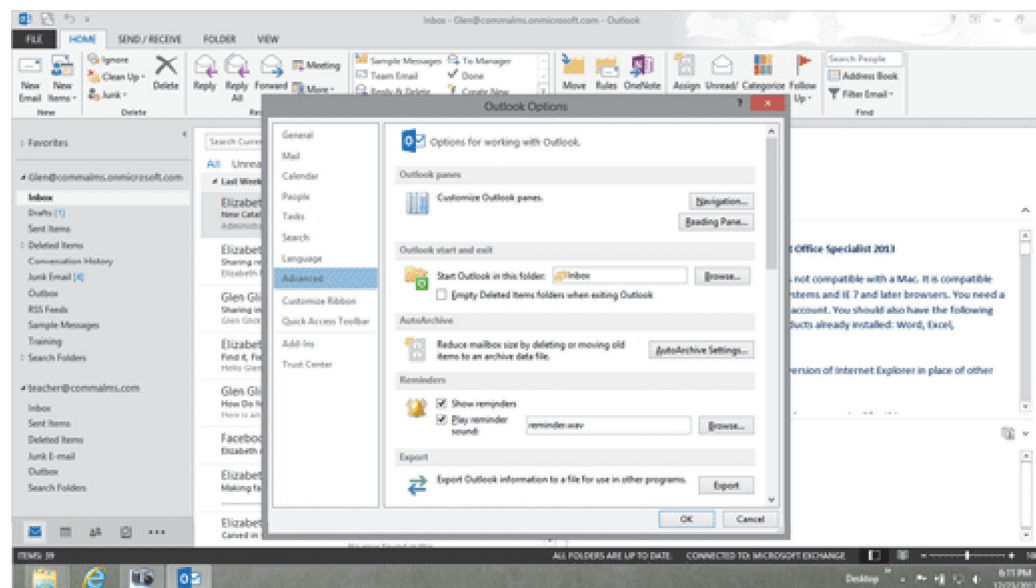
The archived items can be saved to a different data file, archive.pst, or deleted.

**1. Try it: Find the AutoArchive Settings**  
Go to **File -> Options -> Advanced**.  
Click on **AutoArchive Settings**.

Keep going...



File ->Options-> Advanced->AutoArchive Settings



### AutoArchive



Reduce mailbox size by deleting or moving old items to an archive data file.

[AutoArchive Settings...](#)

Exam 77-423: Microsoft Outlook 2013  
1.0 Manage the Outlook Environment  
1.1 Customize Outlook Settings: Manage Multiple Accounts (Archive Data Files)



## Edit the AutoArchive Settings

### 2. Try it: Edit the AutoArchive Settings

Click on **Run AutoArchive every...**

All of the options will become available.

The AutoArchive will run every 14 days. You can change the timing if you wish. You will be prompted before the AutoArchive runs.

The AutoArchive can do the following:

Delete expired E-mails  
Show the Archive Folder

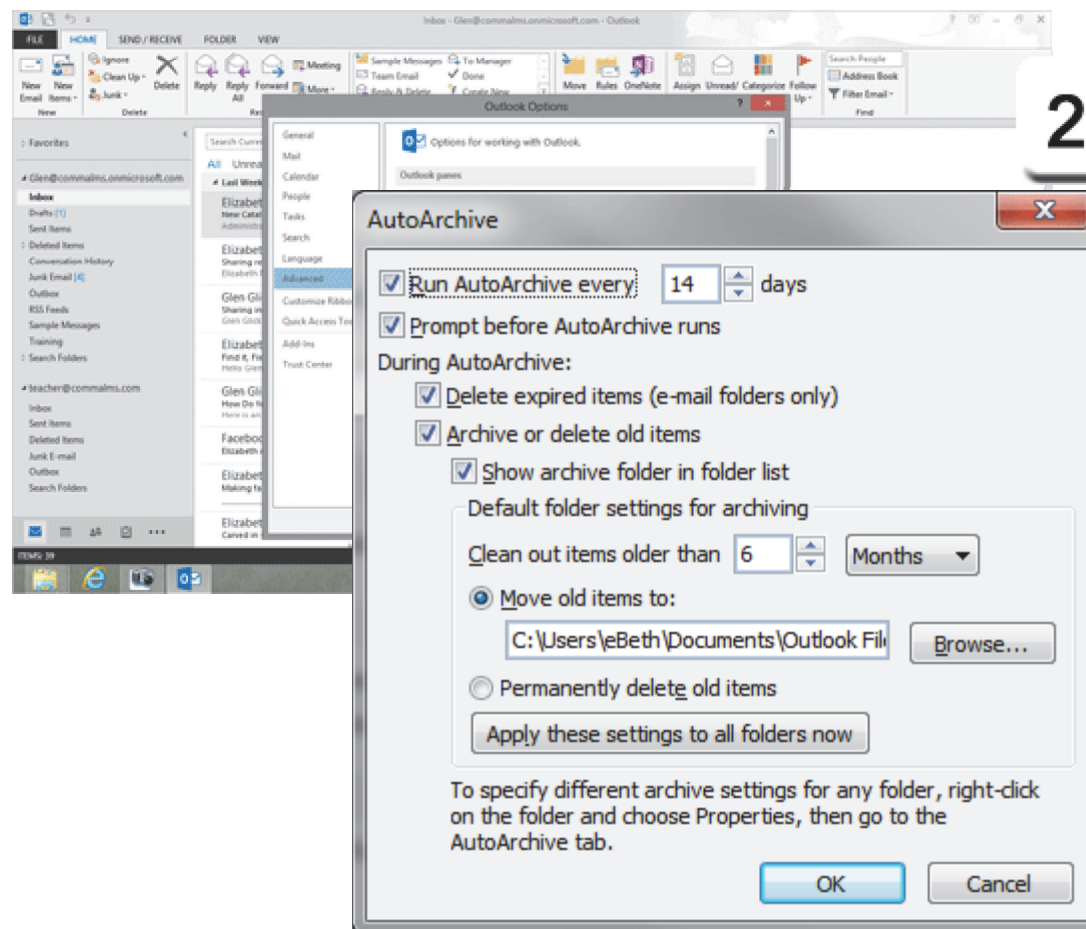
You can choose how to handle the old items:

Move them to an archive.pst folder  
Permanently Delete.

You do not need to run the AutoArchive now.  
Uncheck **Run AutoArchive every...**

Click **Cancel** to return to the Outlook Options.  
**Close** the Options window and go to the **Inbox**.

File -> Options -> Advanced -> AutoArchive Settings



Exam 77-423: Microsoft Outlook 2013  
1.0 Manage the Outlook Environment  
1.1 Customize Outlook Settings: Manage Multiple Accounts (Archive Data File Settings)



## The Send/Receive Group

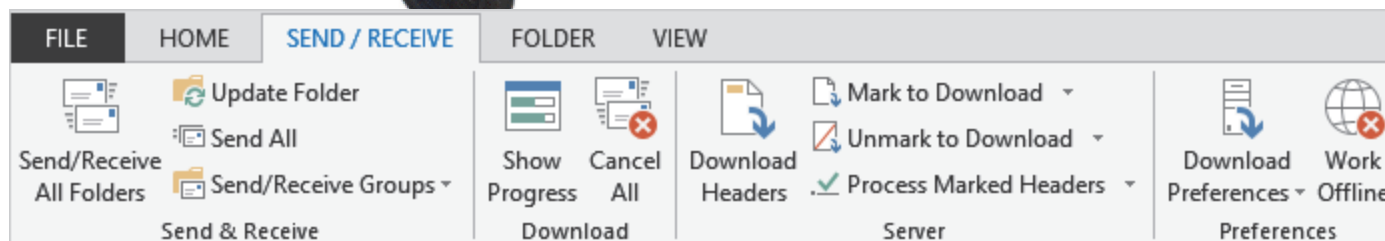
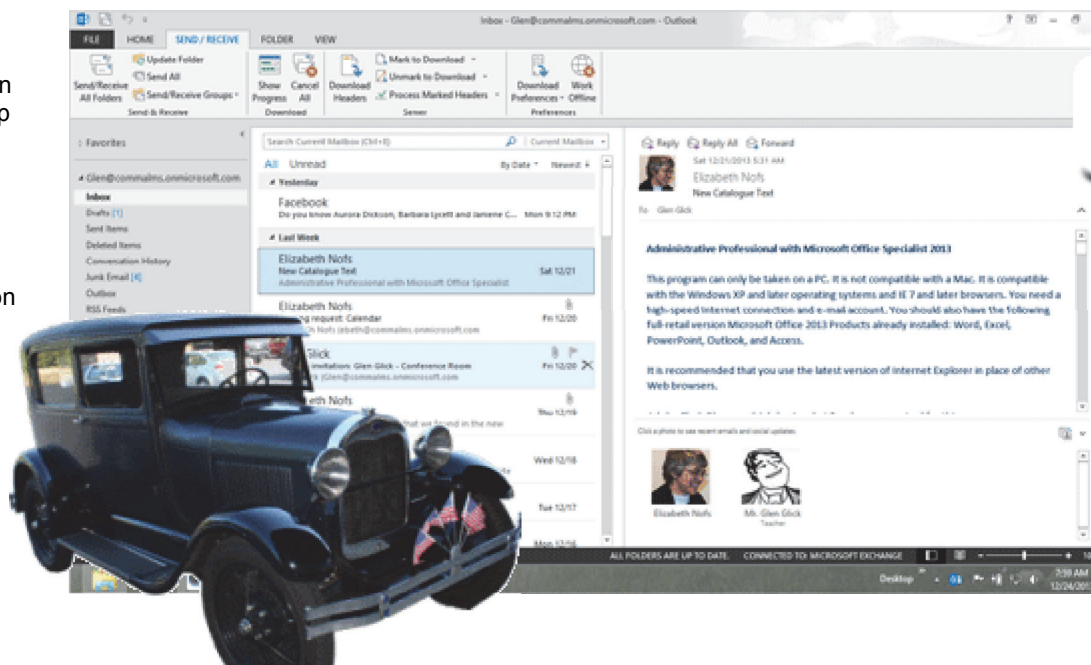
Outlook uses Send & Receive to manage when the E-mail, Social Connections and Newsgroup postings are updated.

**1. Try it: Review the Send/Receive Ribbon**  
Go to **Send/Receive**.

**What Do You See?** The **Send/Receive** Ribbon has the following:  
Send & Receive  
Download  
Server  
Preferences

Keep going...

Send/Receive->Send & Receive



Exam 77-423: Microsoft Outlook 2013  
1.0 Manage the Outlook Environment  
1.1 Customize Outlook Settings: Manage Multiple Accounts (Send and Receive)





## Send/Receive Groups

By default, Outlook has a Send/Receive Group named All Accounts.

**2. Try it: Find the Send/Receive Groups**  
Go to **Send/Receive->Send & Receive**.  
Click on **Send/Receive Groups**.  
Select: **Define Send/Receive Groups**.

**What Do You See?** The default Group is scheduled to send/receive **automatically** every 30 minutes. You can change the time interval if you wish.

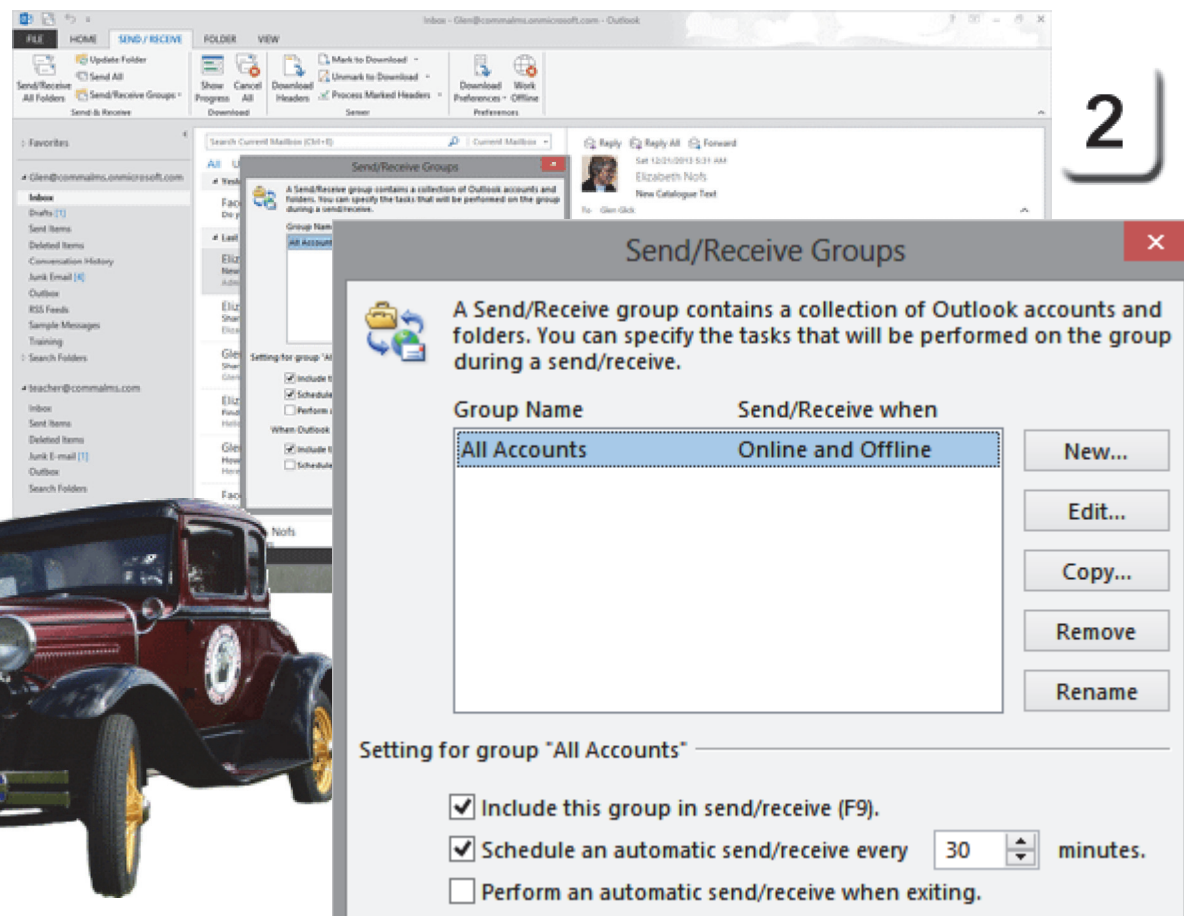
The options include: New, Edit, Copy, Remove and Rename.

**Try This, Too: Edit the Group**  
Select the Group: All Accounts.  
Click **Edit**.

Keep going...



Send/Receive->Send & Receive-> Send/Receive Groups->Define Send/Receive Groups



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Exam 77-423: Microsoft Outlook 2013  
1.0 Manage the Outlook Environment  
1.1 Customize Outlook Settings: Manage Multiple Accounts (Send and Receive)



## Edit the Accounts

### 3. Try it: Review the Accounts

There are two Send/Receive Settings: Account Options and Folder Options

**Account Options** let you select which Account(s) are part of the Send/Receive Group. The Account can be an E-mail address or a Published Calendar.

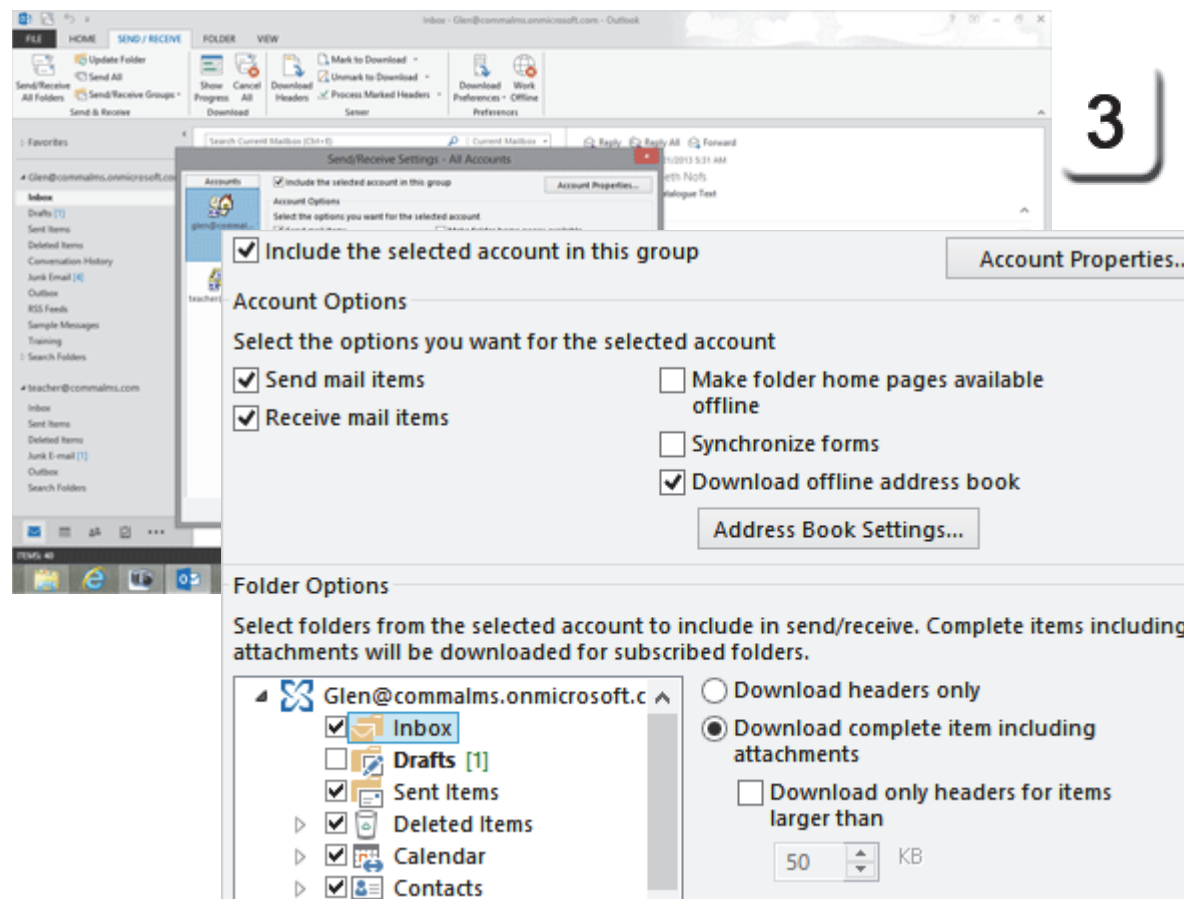
You can also check if this Account should:  
Send Mail Items  
Receive Mail Items

**Folder Options** manage Downloads. The default location is the Inbox, although you can chose a different folder.

The Folder Options are:  
Download headers only  
Download complete items including attachments  
Download only headers for items larger than 50 KB.

Click **OK** to close the window.

Send/Receive->Send & Receive-> Send/Receive Groups->Define Send/Receive Groups



Exam 77-423: Microsoft Outlook 2013  
1.0 Manage the Outlook Environment  
1.1 Customize Outlook Settings: Manage Multiple Accounts (Send and Receive)



## Out of Office: OOO!

When Microsoft Outlook is connected to an Exchange Server or Office 365, you can set the Out Of Office option. Here are the steps to create **Automatic Replies**.

### 4. Try it: Create an Automatic Reply

Go to **File->Info->Automatic Replies**.

Click on **Send automatic replies**.

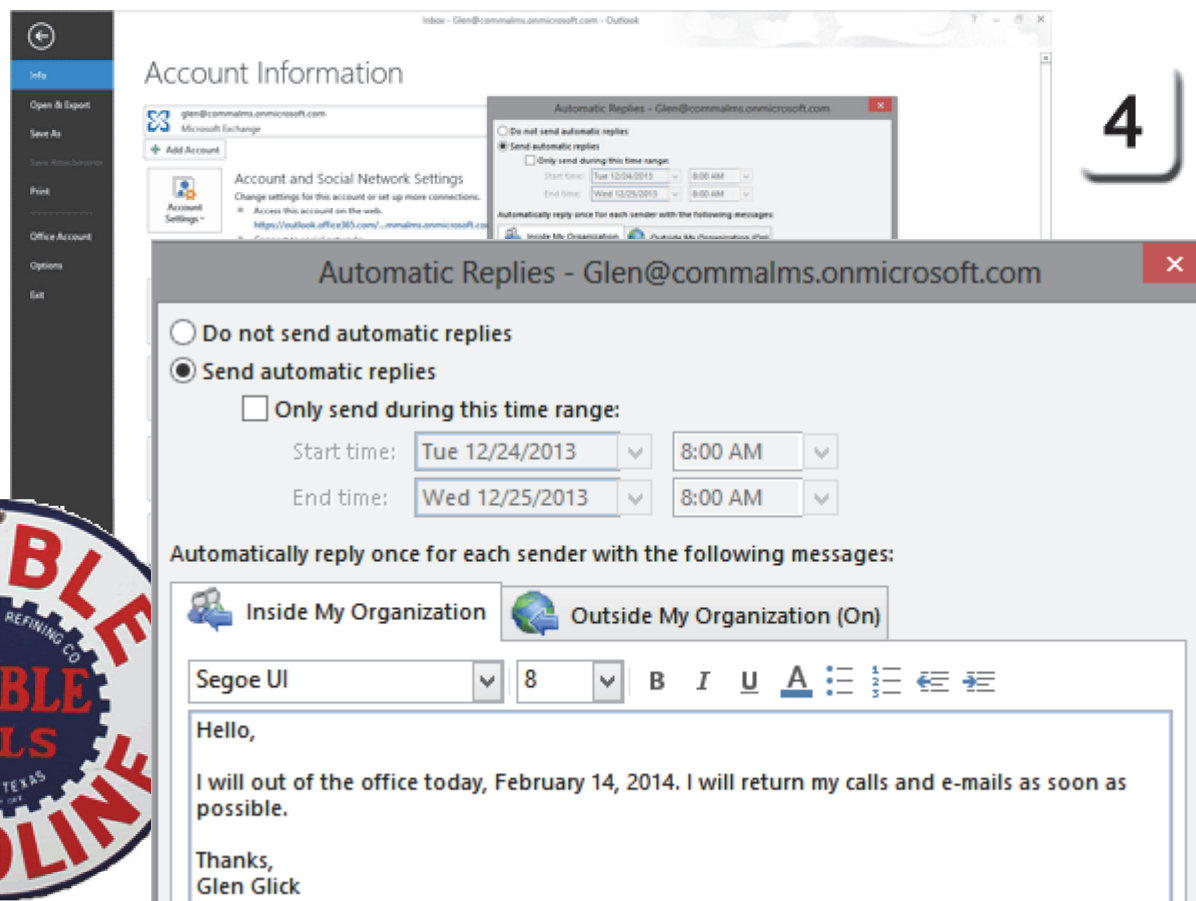
Edit the reply with a sample message.

**What Did You See?** You can create a different message for replies sent to people Inside or outside of your organization.

Click **OK** to save the OOO setting. That will work.



### File->Info->Automatic Replies



Exam 77-423: Microsoft Outlook 2013  
1.0 Manage the Outlook Environment  
1.1 Customize Outlook Settings: Manage Multiple Accounts (Out Of Office)



## Still More Advanced Options

### 5. Try it: Review More Advanced Options Go to File->Options->Advanced

**Send and receive:** Microsoft Outlook sends your E-mail as soon as you are connected to the Internet.

**Developers:** You can design your own Outlook forms if you wish. This option is used by Developers for programming and errors.

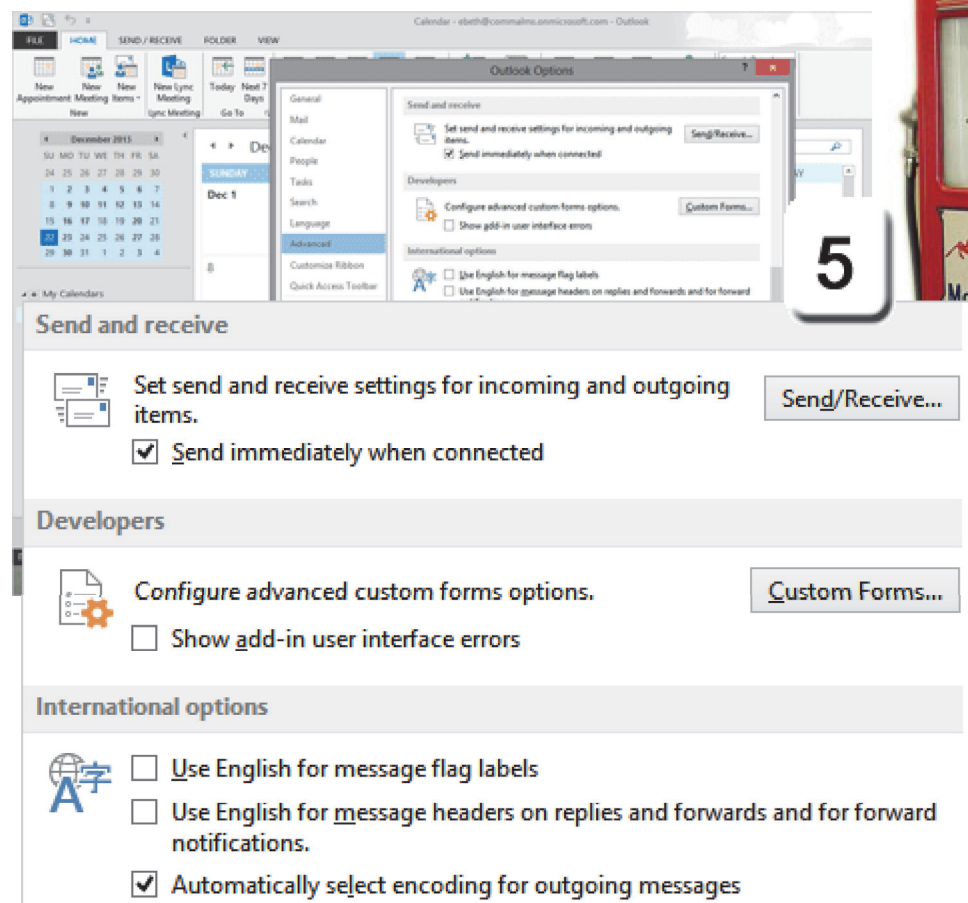
**International options:** For folks who work with Contacts in different countries, Microsoft Outlook has International options. You can choose the default language for the messages. There is another option to let Outlook select the encoding for the outgoing messages automatically.

## Summary

This concludes the Complete Guide to Microsoft Outlook 2013. This lesson demonstrated how to add an Account and troubleshoot the Account Settings.

We've looked at just about every Ribbon and option there is. You done good.

### File ->Options-> Advanced



Exam 77-423: Microsoft Outlook 2013  
1.0 Manage the Outlook Environment  
1.1 Customize Outlook Settings: Set Outlook Options





## Test Yourself

1. Where are the settings to set-up an E-mail account?

- a. Go to File-> Backstage
  - b. Access the Backstage by going Home-> Settings
  - c. Go to View-> Account Settings
  - d. Access the Backstage by going File-> Info
- Tip: Complete Guide to Outlook, page 344

2. Where would a user get the E-mail account settings from?

- a. Microsoft
- b. Their E-mail provider
- c. Their computer teacher
- d. Make them up

Tip: Complete Guide to Outlook, page 347

3. Which are options for reducing the size of the Outlook data file? (Select all correct answers.)

- a. Compress pictures
- b. Compact
- c. Archive

Tip: Complete Guide to Outlook, page 354-355

4. In the Account Settings dialogue box, which of the following are available options for E-mail accounts? (Give all correct answers.)

- a. New
- b. Add
- c. Repair
- d. Set as Default
- e. Remove
- f. Delete

Tip: Complete Guide to Outlook, page 353

5. By default, how often does Outlook Send/Receive?

- a. 5 minutes
- b. 30 minutes
- c. 15 minutes
- d. 60 minutes
- e. Only when the Send/ Receive button is clicked

Tip: Complete Guide to Outlook, page 360

