



**Microsoft Outlook 2016
Beyond the Basics
Course Notes**

Sample

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COURSE OBJECTIVES

By the end of this course you will be able to

- Accurately create a specified Contact Group, without referring to notes.
- Correctly create a signature that incorporates a specified Electronic Business Card, referring to notes if necessary.
- Correctly create a specified rule, referring to notes if necessary.
- Briefly describe how to set up an out-of-office message.
- Correctly modify a specified message view, referring to notes if necessary.
- Correctly create a new colour category, without referring to notes.
- Accurately assign colour categories to contacts, referring to notes if necessary.
- Briefly describe how to set follow-up flags.
- Briefly describe how to create an additional calendar.
- Correctly carry out a specified search, referring to notes if necessary.

MODULE 1 – LISTS AND CONTROLLING MESSAGES

OBJECTIVES

At the end of this section you will be able to:

- Accurately create a specified Contact Group, without referring to notes.
- Correctly create a signature that incorporates a specified Electronic Business Card, referring to notes if necessary.
- Correctly create a specified rule, referring to notes if necessary.
- Briefly describe how to set up an out-of-office message.

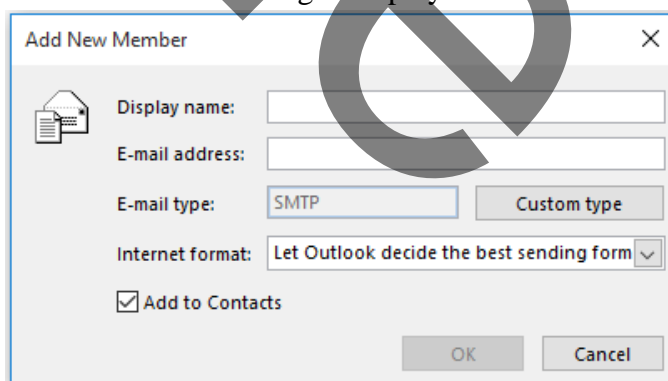
CONTACT GROUPS

If you frequently email the same group of recipients, a contact group, or distribution list, can be a real time saver. Instead of having to add each individual contact one-at-a-time, you simply add the contact group to your email and have included all of those contacts in one step.

To create a contact group

1. On the **Home** tab of the Ribbon, in the *Send/Receive* group, click on the **New Items** button, then select **More Items** and select **Contact Group**. Alternatively press **Ctrl**+**Shift**+**L**. A blank *Contact Group* will be displayed.
2. In the *Name* textbox, type a name for your group.
3. To add members from existing contacts, in the *Members* group of the Ribbon, click on the **Add Members** button. Choose to add members using one of the following options:
 - **Outlook Contacts or an Address Book** - the *Select Members* window will be displayed. In the Address Book drop-down list, select the address book that contains the e-mail addresses that you want to include in your Contact Group.
 - a) Double-click on each contact you wish to add to the group, they will appear in the *Members* textbox at the bottom of the dialog, or type email addresses directly in the *Members* textbox. Each address will be separated by a semi-colon.
 - b) When you have selected all of the contacts you wish to add to the contact group, click on **OK**.
 - **New E-mail Contacts**. The *Add new Member* dialog is displayed as shown here. Complete the boxes in the dialog, and if you want to add this person to your contacts at the same time ensure you tick the *Add to Contacts* check box. Click on **OK** to close the dialog.

*Note: To save lots of form filling, if you have a list of email addresses with individual addresses separated by a semi-colon, copy the list to the clipboard and use the **Outlook Contacts** option (step 3 above). You can click in the Member textbox and paste the list.*



4. In the *Contact Group* window, and in the *Actions* group of the Ribbon, click on the **Save & Close** button.

The newly created contact group will now appear in your address book and contacts. A contact group can be differentiated from an individual's entry by looking at the icon and the name/details are also emboldened (not in all views).



To edit a contact group

1. In People double-click on the *Contact Group* name to edit.
2. Make any changes then in the *Actions* group of the Ribbon, then click on **Save & Close**.

To delete a contact group

1. In People click on the *Contact Group* name to select it.
2. Press **Del** and confirm your action.

Note: You do not delete the contacts within the group if they are separate entries in Contacts; however, if you group contains email addresses that are not individual entries elsewhere, these email addresses will be lost.

Time for Exercise 1

SIGNATURES, BUSINESS CARDS AND STATIONERY

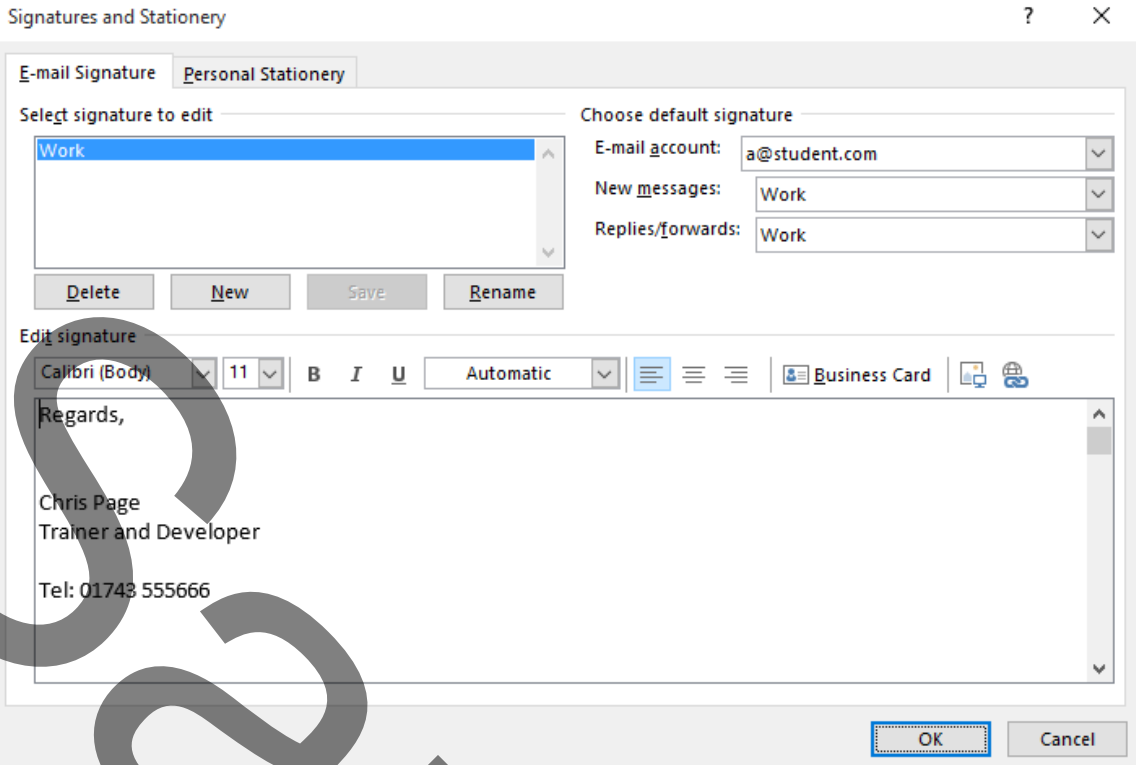
Signatures

An e-mail signature consists of text or pictures that are automatically added to the end of an outgoing e-mail message. You can create as many signatures as you want, so that you can have signatures for a variety of purposes, such as business or personal messages. You can format the text in the signatures that you create by using colours and fonts. You can also add other elements to the signature, such as your Electronic Business Card, pictures, or logos.

While a signature can be created during the creation of a message, it is best to set up signatures beforehand.

To create a signature

1. Either,
 - Select the **File** tab in the Ribbon then click on **Options**. Select the **Mail** category in the left-hand panel and in the *Compose messages* section, click on the **Signatures** button.
 - Alternatively, in a new mail message select the **Message** tab of the Ribbon, and in the *Include* group click on the **Signature** button. Then select **Signatures...** from the drop-down menu.
2. The *Signatures and Stationery* dialog is displayed.



3. On the **E-mail Signature** tab, click on the **New** button.
4. Type a descriptive name for the signature (such as Fred Work or Ann Personal), and then click on **OK**. You are then returned to the *Signatures and Stationery* dialog.
5. In the *Edit Signature* box in the lower half of the form, type the text that you want to include in the signature. The text can be formatted using the buttons above the text box.

Note: These formatting options can be set even if you use plain text as your message format. The formatting will not be visible in your outgoing messages, however it will be visible to recipients if you change the format to HTML or .rtf message formats.
6. To add an Electronic Business Card (see later in this manual), click in the text where you want the card to appear then click on **Business Card**, and then select a contact in the *Filed As* list. Then click on **OK**.
7. To add a picture, click in the text where you want the picture to appear, click on the **Insert Picture** button, browse to an image, click to select it, and then click **Insert**.
8. To add a hyperlink, place your insertion point where you want the link to appear in the signature text, click on the **Insert Hyperlink** button, browse to a hyperlink, click to select it, and then click **OK**.
9. The following steps are optional.
 - a. You can now choose the email account and the message types to associate the signatures with. Under *Choose default signature* in the top-right corner of the dialog select an email account using the drop-down selector beside *E-mail Account*. (If you only have one email account it will be selected already.)
 - b. In the *New messages* list if you want a signature to be inserted automatically in each message that is sent from the e-mail account that you chose, select a signature in the list. If you do not want a signature to be inserted automatically in each message that is sent, select none in the list.

- c. If you want to include a signature in message replies and in forwarded messages, in the *Replies/forwards* list, select a signature. If not, select none.
10. After you finish creating the signature, click on OK.

To insert a signature manually in a message

1. In a new mail message position the insertion point where the signature is to appear.
2. Select the **Message** tab of the Ribbon, and in the *Include* group click on the **Signature** button.
3. Select the relevant signature to insert from the drop-down menu.

To edit an existing signature

1. Either,
 - Select the **File** tab in the Ribbon then click on **Options**. Select the **Mail** category in the left-hand panel and in the *Compose messages* section, click on the **Signatures** button.
 - Or, in a new mail message select the **Message** tab of the Ribbon, and in the *Include* group click on the **Signature** button. Then select **Signatures...** from the drop-down menu.
2. The *Signatures and Stationery* dialog is displayed.
3. Select the signature from the top-left box.
4. Make your required changes then click on **OK**.

To delete a signature

1. Either,
 - Select the **File** tab in the Ribbon then click on **Options**. Select the **Mail** category in the left-hand panel and in the *Compose messages* section, click on the **Signatures** button.
 - Or, in a new mail message select the **Message** tab of the Ribbon, and in the *Include* group click on the **Signature** button. Then select **Signatures...** from the drop-down menu.
2. The *Signatures and Stationery* dialog is displayed.
3. Select the signature from the top-left box.
4. Click on the **Delete** button and confirm the deletion.
5. Click on **OK** or **Cancel** to close the dialog - cancel has no effect as the deletion has already been confirmed.

Electronic Business Card

Electronic Business Cards make sharing contact information easier. They can quickly be inserted into messages that you send and are immediately recognizable by the recipient. You can also forward the cards or include your card in a signature that is automatically included in outgoing messages. In each case, in an HTML-based message, the person who receives your message gets a visible identifier to quickly save as a contact.

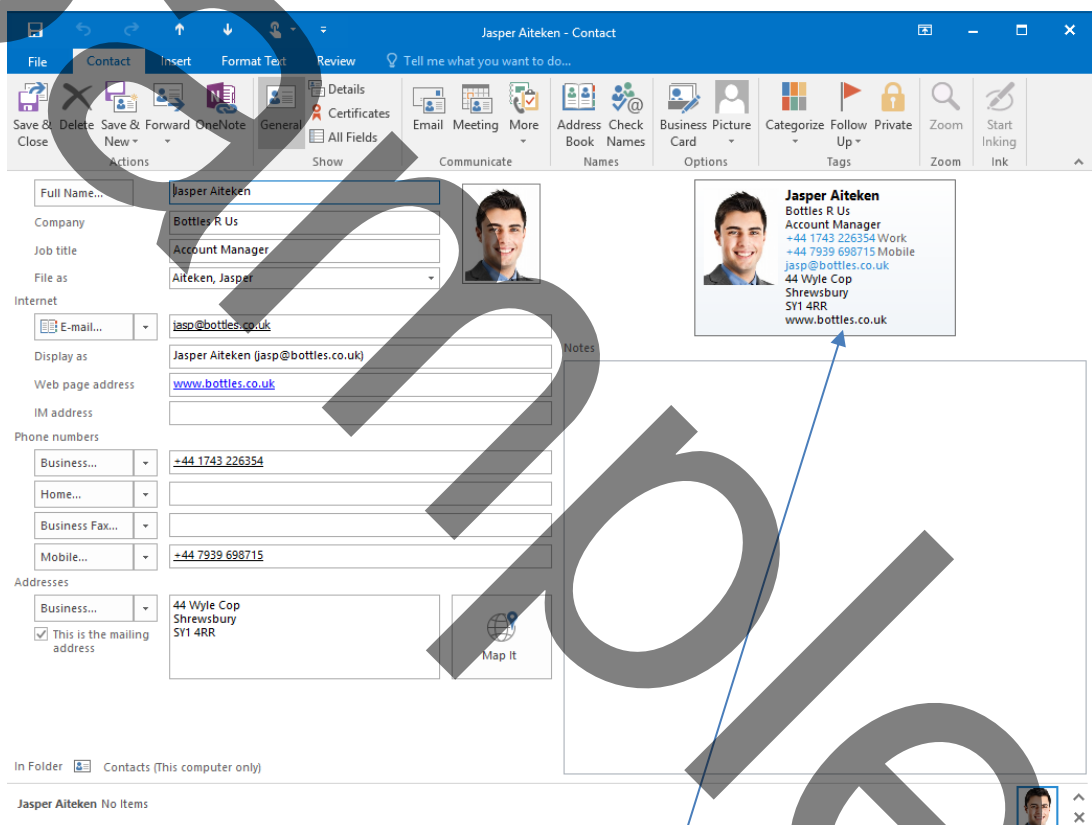
How people see an Electronic Business Card depends on their email software:

- People who use Outlook 2007 or later see the Electronic Business Card in the message, represented just as you sent it. The recipient can right-click the card and save the information to Outlook Contacts.
- People with earlier versions of Outlook or other e-mail applications who use HTML to view e-mail also see the Electronic Business Card in their message. These cards are images only, however. Recipients also receive an attached .vcf file that contains the card's information. They can open the .vcf file and save that information to their contact lists.
- People who view their e-mail in plain text won't see an image of the Electronic Business Card in the message, but they receive the .vcf file attachment, which contains the contact information that they can save to their contact lists.

Each contact in your *Contacts* list has a default Electronic Business Card. You would need to create a contact entry for yourself to create a business card for yourself. Once a card is created it can be edited.

To edit an Electronic Business Card

1. In People make sure you are using any view other than *People* (such as *Card* or *List*).
2. Double-click on the *contact entry* name to open it.



3. The default card is displayed in the top-right corner.
4. If you would like to see a photograph on the card, then select the **Contact** tab of the Ribbon, and in the *Options* group click on the **Picture** button. Select **Add Picture...** then choose a suitable photograph. The new picture will be beside your *Name* and *Company* details in the Contact record, and also on your card. To modify the picture, click on the **Picture** button again and select **Change Picture...** to change to a different picture, or **Remove Picture...** to return to the default graphic.

EXERCISE 1

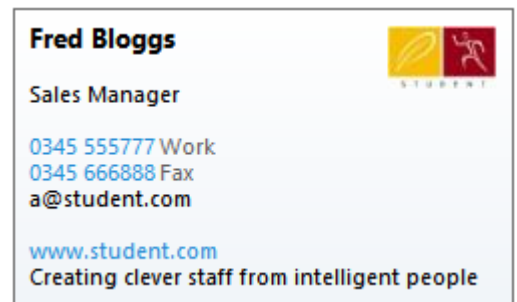
1. Start Outlook 2016 if it is not already running.
2. Create a new Contact Group called *Sales Team* consisting of:
 - Student A
 - Student B
 - Student C
3. Create a new Contact Group called *Support Team* consisting of:
 - Student D
 - Student E
 - Student F
4. Edit the *Sales Team* contact group and remove Student C, then add in Student D.
5. Edit the *Support Team* contact group and remove Student D, then add in Student C.

EXERCISE 2

1. Create a new contact record for yourself using the following details:

Name:	Use your own name
Company:	Student Ltd
Job Title:	Sales Manager
Business Tel:	0345 555777
Business Fax:	0345 666888
Email:	Use your course email address which is in the form <i>?@student.com</i> where the ? is your student letter.
Web page address:	www.student.com

2. Modify the Electronic Business Card of this record so the layout looks the same as the card shown below (apart from the name and email address). For the logo use the file **StudentLogo.jpg** found in your PC's *My Pictures* folder.
3. Close and save the changes to this new contact record.
4. Now create a signature for yourself on your email account that looks like this below (again the name will be yours!)



5. Make sure the signature is attached automatically to new messages and replies/forwards, then close and save the changes.
6. Now create a new email. The signature should appear. Send this email to the student on your left.
7. You will also receive an email from another student. Add their business card to your contacts by double-clicking on the vcf attachment.

Regards

Fred Bloggs

