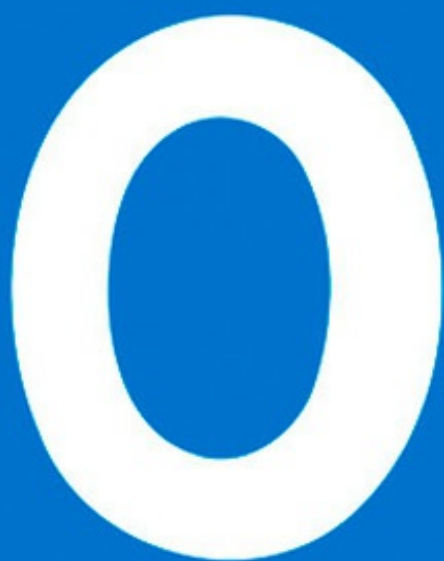


# Outlook 2016

Shelley Fishel



SHELLEY FISHEL

---

# OUTLOOK 2016

Outlook 2016

1<sup>st</sup> edition

© 2016 Shelley Fishel & [bookboon.com](http://bookboon.com)

ISBN 978-87-403-1399-4

# CONTENTS

	<b>About Shelley Fishel</b>	<b>8</b>
	<b>About Outlook 2016</b>	<b>9</b>
<b>1</b>	<b>Outlook 2016 Home Screen</b>	<b>10</b>
1.1	The Ribbon	10
1.2	The Quick Access Toolbar	11
1.3	The Alt Key	13
1.4	Drag and drop between email and calendar	13
1.5	Sneak peek	17
<b>2</b>	<b>Mail</b>	<b>23</b>
2.1	New email	23
2.2	Add an attachment	23
2.3	Attach a copy	25
2.4	Reply to an email	26

**CMO INSPIRED CONFERENCE**  
25 OCTOBER | DE VERE BEAUMONT ESTATE | OLD WINDSOR UK

**Join Over 100 Chief Marketing Officers & Digital Innovators**

2.5	Pop out or discard	27
2.6	Reply with meeting	29
2.7	Insert a copy of your calendar	30
<b>3</b>	<b>Email options</b>	<b>34</b>
3.1	Themes	35
3.2	Show fields	36
3.3	Permission	36
3.4	Vote	37
3.5	Preview attachments	39
3.6	Insert and format a table	42
3.7	Insert a picture	43
3.8	Add a chart	46
<b>4</b>	<b>Create a signature</b>	<b>48</b>
4.1	Create a signature	48
<b>5</b>	<b>Conversations</b>	<b>51</b>
5.1	Conversation view	51
5.2	Conversation cleanup	54
5.3	Ignore a conversation	58
<b>6</b>	<b>Deleting email</b>	<b>59</b>
6.1	Delete email	59
6.2	Empty deleted items	60
2.1	Empty deleted items	61
<b>7</b>	<b>Archiving</b>	<b>64</b>
7.1	Online Archive	64
7.2	Archive Policy	65
7.3	Archive Folder	65
7.4	View the Online Archive	65
7.5	Set Archive Policy	66
7.6	The Archive Button	67
<b>8</b>	<b>Filing</b>	<b>69</b>
8.1	Create a folder	69
8.2	Drag and drop to file email	70

<b>9</b>	<b>Quicksteps</b>	<b>76</b>
9.1	QuickSteps in Outlook	76
9.2	Categorise and move	79
9.3	Flag and move	80
9.4	New email to	81
9.5	Forward to	82
9.6	Meeting with	83
9.7	Standard response and add to calendar	85
<b>10</b>	<b>Custom Quicksteps</b>	<b>88</b>
10.1	Create a standard email response	88
10.2	Standard email	89
10.3	Reply and move	91
<b>11</b>	<b>Email templates</b>	<b>93</b>
11.1	Creating a template for email in Outlook 2016	93
<b>12</b>	<b>Search</b>	<b>96</b>
12.1	Search for email	96
12.2	Using the Filter icon	99
<b>13</b>	<b>Search folders</b>	<b>100</b>
13.1	Search folders	100
<b>14</b>	<b>Calendar</b>	<b>103</b>
14.1	The Calendar	103
14.2	Calendar views and arrangements	103
14.3	Timescale	108
14.4	Open other calendars	108
14.5	Share calendars	110
14.6	Calendar overlay	113
14.7	Calendar groups	113
14.8	Appointments	117
14.9	Meetings	119
14.10	The scheduling assistant	120
14.11	Tracking meeting responses	121

<b>15</b>	<b>Contacts – people</b>	<b>123</b>
15.1	Contacts are now called People	123
15.2	View contacts	123
15.3	Create a contact	125
15.4	Add contact details direct from incoming email	126
15.5	Communication options in the message header	127
15.6	Favourite people and peek	128
15.7	Create a contact group	129
15.8	Email a contact group	132
15.9	Organise contacts in folders	134
<b>16</b>	<b>Tasks and to do</b>	<b>137</b>
16.1	To do	137
16.2	Tasks	139
16.3	Show Tasks on their Due Date on the Calendar	141
16.4	Create a task from an email	142
16.5	Create a task from an appointment	144
<b>17</b>	<b>Mail merge</b>	<b>145</b>
17.1	Mail merge	145
17.2	Create the message	147
<b>18</b>	<b>Rules</b>	<b>151</b>
18.1	Create the Rule	151
<b>19</b>	<b>Groups in Outlook 2016</b>	<b>157</b>
19.1	Create a New Group	157
19.2	Complete the Create Group dialogue box	157
19.3	Add members	157
19.4	Find and join a group	159
19.5	Join a Private Group	160
19.6	Receive email confirmation	162
19.7	Start a conversation	162
19.8	Reply to a conversation	164
19.9	A word about Subscribing or Joining a Group	166
19.10	Add a group meeting	167
19.11	Group Files	168
19.12	Shared Files	169
19.13	Group Notebook	170
	<b>Index</b>	<b>171</b>

# ABOUT SHELLEY FISHEL

Shelley Fishel has eighteen years' experience in helping people to get more from their computers. After working for an IT training organization Shelley decided to 'do her own thing' when she realized the limitations of delivering standard courses.

“Why waste time and money on training people in areas that are not relevant to them? It's common sense to invest that time and effort on what they really need.”

That was the 'light bulb moment' and the IT Training Surgery's unique approach has resulted in a growing business with a team of highly qualified IT trainers.

“If trainees get bored they forget most of what they learn. We like to offer a range of training approaches to suit different people and, most of all; we aim to make training fun!”

Shelley and her team have worked hard to achieve accreditation by the Learning and Performance Institute for the IT Training Surgery, as a recognized high quality provider of IT training.

To find out more about our training give us a call on 020 8203 1774 or visit our website [www.theittrainingsurgery.com](http://www.theittrainingsurgery.com)

# ABOUT OUTLOOK 2016

This user guide will enable you to save time when working in Outlook 2016.

You will learn how to:

- Create folders to keep your email tidy
- See how Outlook 2016 handles attachments
- Use QuickSteps to do things such as filing or creating standard emails speedily
- Add appointments – all day events and Scheduled Meetings
- Create Tasks
- Perform an email mail merge
- Shortcuts for working with email and calendar
- Learn how to use Groups to collaborate with others

This book is written using Outlook 2016 which is part of an Office 365 subscription. The computer used is running Windows 10. Your copy may look slightly different to the screenshots in this book if you are running a different version of Windows.

Office 365 is kept up to date on a regular basis and new features are being released every month. Look out for the Microsoft Blog that tells you all about what is new each month.

As such I cannot guarantee that functionality in this edition of the book is the most up to date. It is up to date at the time of writing, June 2016.

# 1 OUTLOOK 2016 HOME SCREEN

## 1.1 THE RIBBON

The Ribbon is present in Outlook 2016 everywhere. All the tabs have tools arranged in groups and are organized logical.

### 1.1.1 THE HOME RIBBON

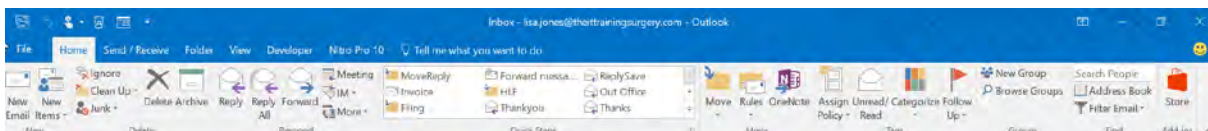


Figure 1 – The home ribbon

Here you will find all the tools you need to create and respond to email.

### 1.1.2 THE SEND RECEIVE RIBBON

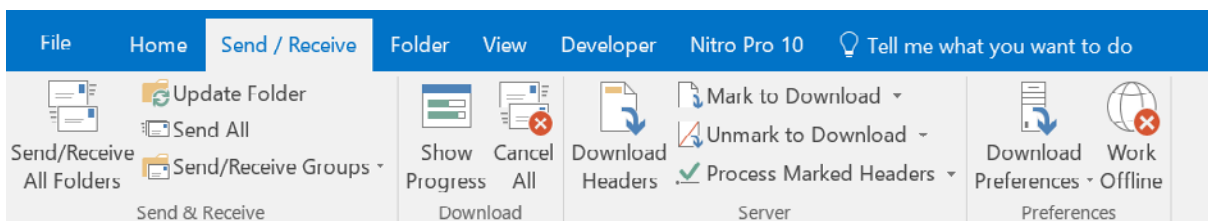


Figure 2 – The send receive ribbon

The Send Receive Ribbon provides all the tools you need to send and receive emails.

### 1.1.3 THE FOLDER RIBBON

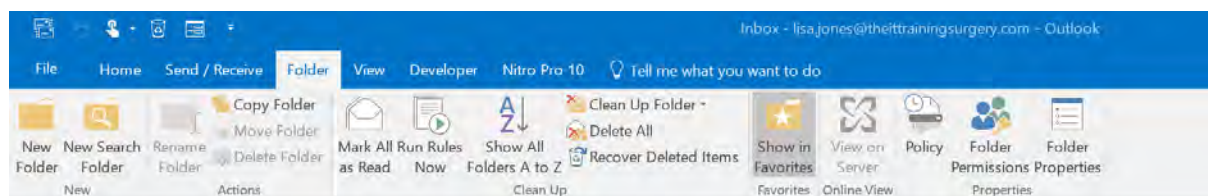


Figure 3 – The folder ribbon

Here you can create new folders and set up search folders and decide what to show in favourites.

### 1.1.4 THE VIEW RIBBON

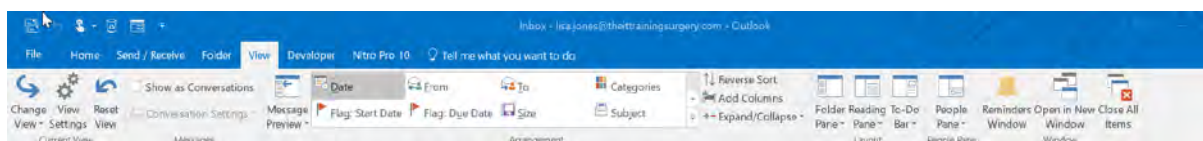


Figure 4 – The view ribbon

On the View Ribbon you can change how the screen you are looking at is arranged. This ribbon will have different icons displayed depending on which part of Outlook you are currently using.

### 1.2 THE QUICK ACCESS TOOLBAR

The Quick Access Toolbar is present across all of Microsoft Office and is a handy place to put your most frequently used icons. It lives at the top left of your screen.



Figure 5 – The quick access toolbar

You can customise it with the Icons that you use most frequently

#### 1.2.1 ADDING AN ICON TO THE QUICK ACCESS TOOLBAR

To add an icon, click the drop down arrow and select the icon from the list.

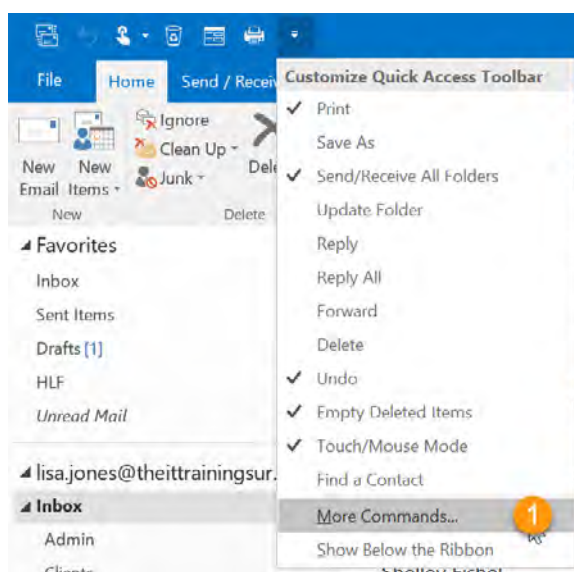
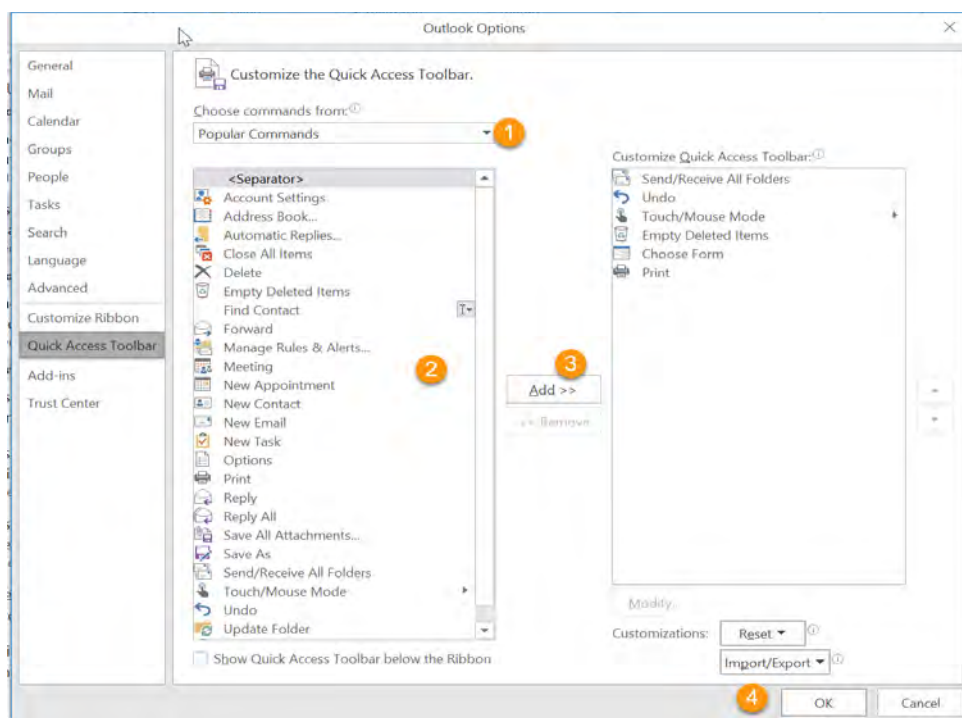


Figure 6 – Add icons to the quick access toolbar

If the icon you want is not on the list you can click More Commands (1).

### 1.2.2 MORE COMMANDS



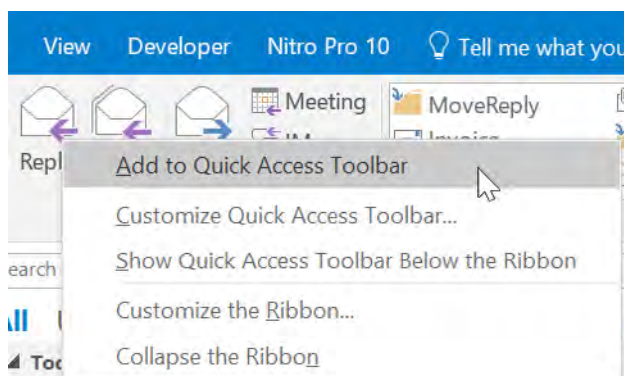
**Figure 7** – Add more commands

Here you can see the Popular Command list on the left (1). There are other lists to choose from, click the drop down arrow if you cannot find what you want.

Find the one you want on the left (2) and either double click to make it jump across or click on it and then press the Add (3) button.

Click OK when done (4).

### 1.2.3 RIGHT CLICK TO ADD AN ICON



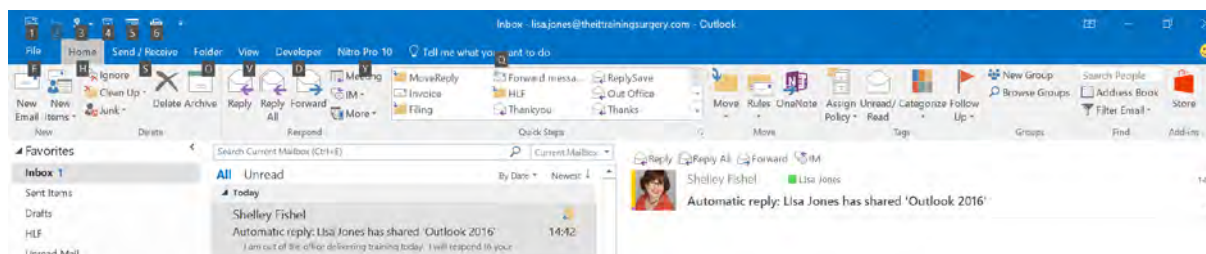
**Figure 8** – Right click

Right click then click on the icon you wish to add.

### 1.3 THE ALT KEY

The Alt Key allows you to access visual keyboard shortcuts for navigating the ribbon or using the Quick Access Toolbar.

Press ALT on the keyboard.



**Figure 9** – The alt key

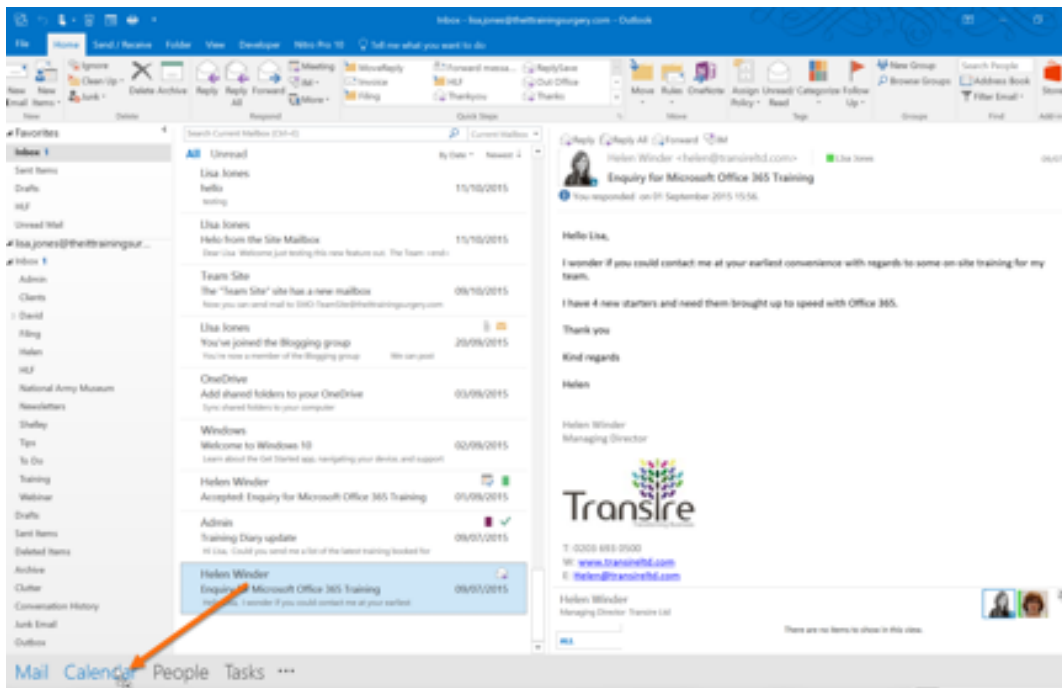
Press the letter or number to use the command. The first time you press the ALT key you will activate the Ribbon tabs. For example if you now press the letter O you will be moved across to the Folder Ribbon.

The icons on the Quick Access Toolbar are numbered which makes them a much quicker keyboard shortcut to use. For example Alt + 6 will be the print command in this example on screen.

### 1.4 DRAG AND DROP BETWEEN EMAIL AND CALENDAR

In Outlook you can drag and drop between the different parts of the software. It is a great time saver. For example drag an email on to the Calendar Icon to create an appointment with the detail from the email in the body. Drag an appointment to the Mail Icon to create an email with the detail of the appointment in the body.

### 1.4.1 DRAG AN EMAIL TO THE CALENDAR



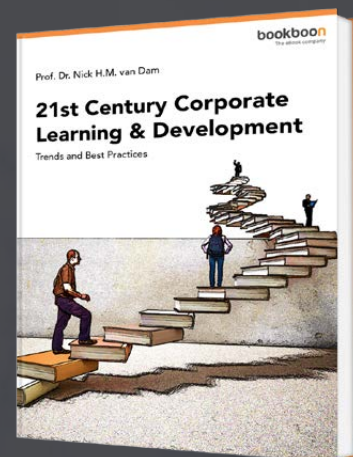
**Figure 10** – Drag email to calendar to create an appointment

Drag the email and drop it on the Calendar Shortcut.

# Free eBook on Learning & Development

By the Chief Learning Officer of McKinsey

**Download Now**

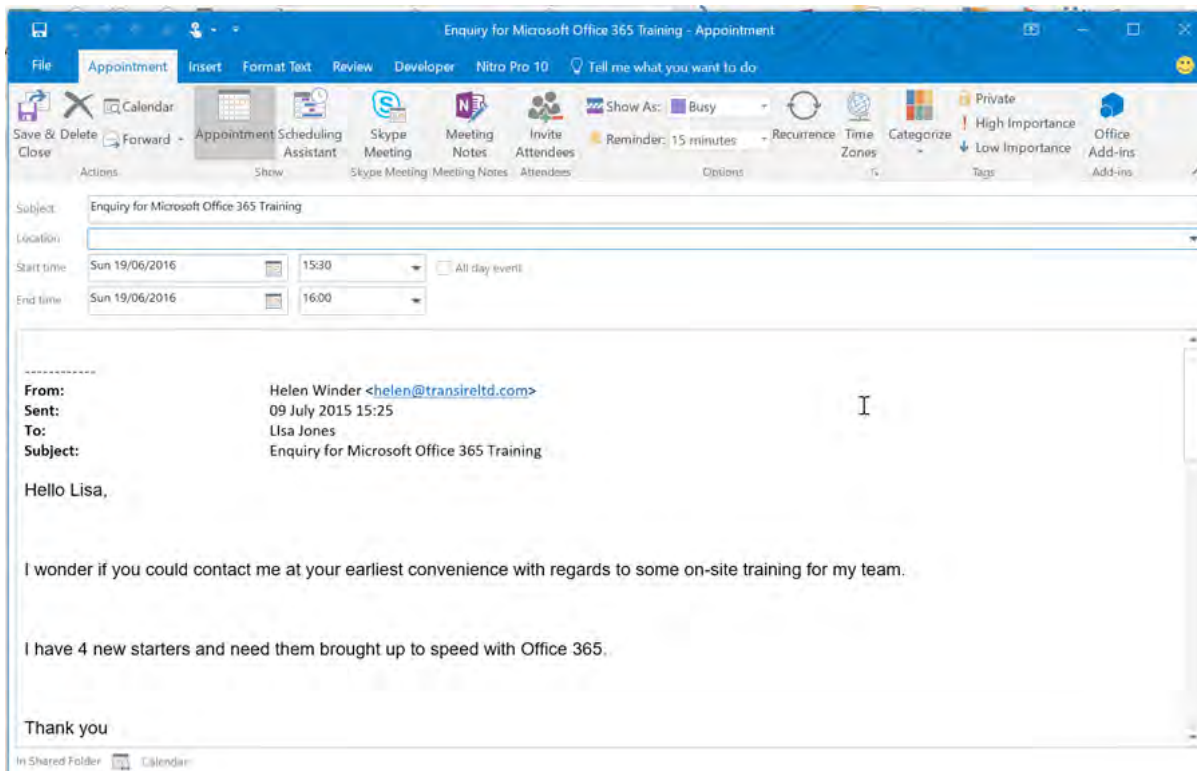


Download free eBooks at [bookboon.com](http://bookboon.com)



**Click on the ad to read more**

### 1.4.2 NEW APPOINTMENT IS CREATED

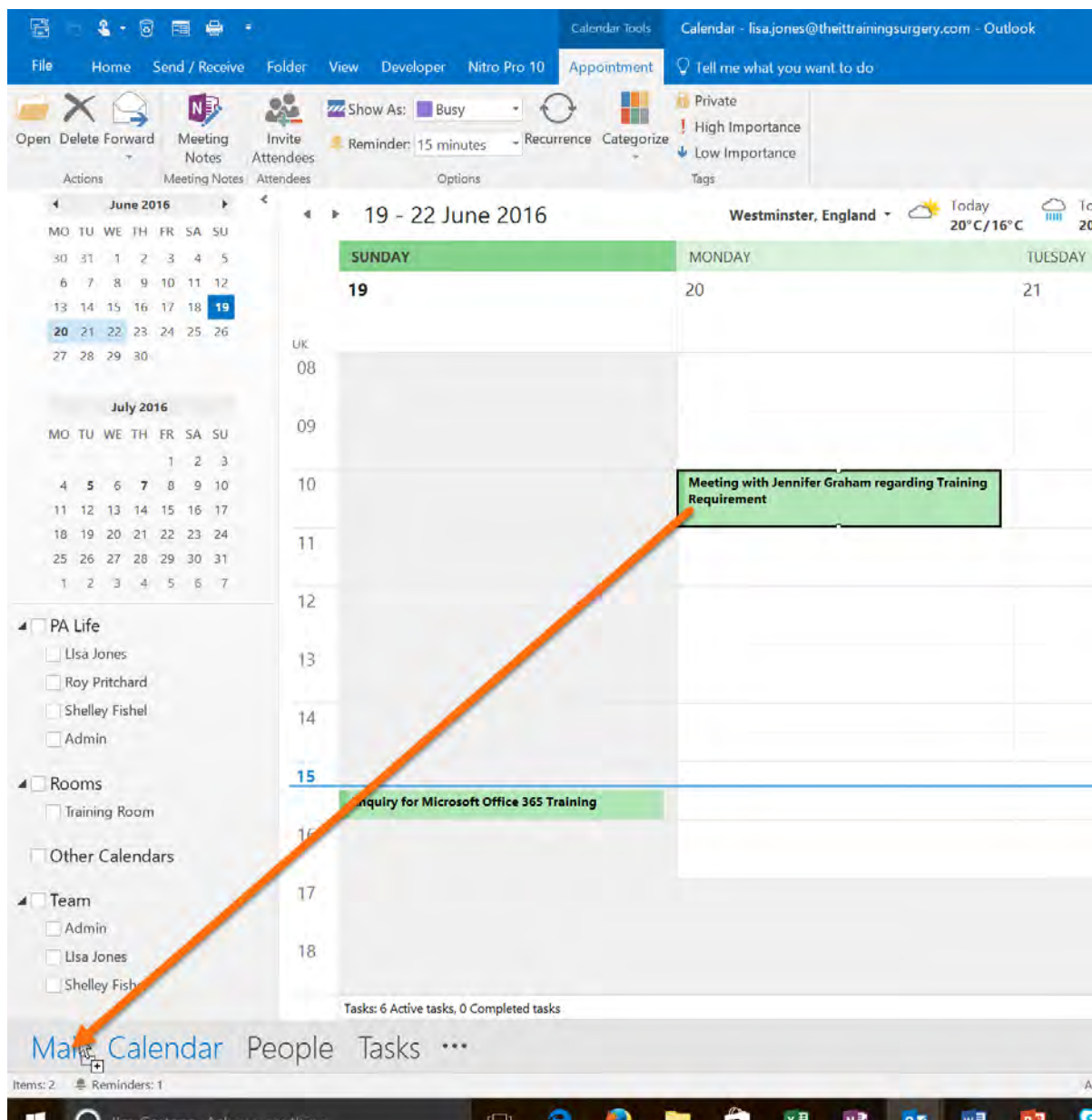


**Figure 11** – New appointment is created

A new appointment is created ready for you to add the date and time.

When you have finished click Save and Close.

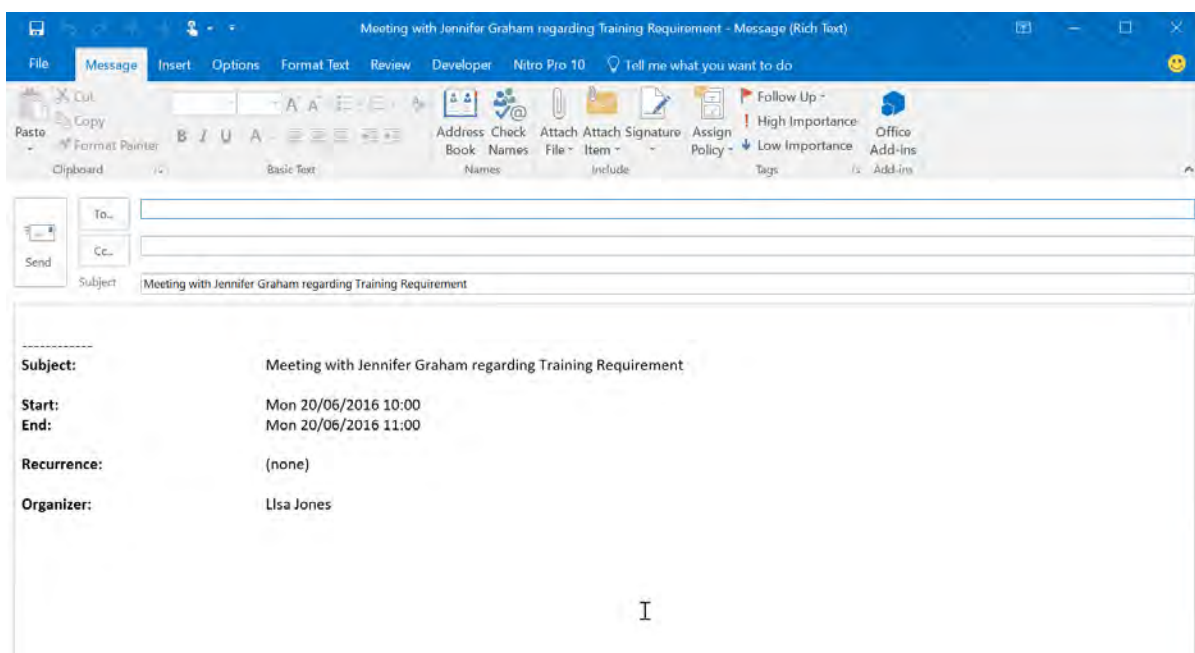
### 1.4.3 DRAG A CALENDAR APPOINTMENT TO MAIL



**Figure 12** – Drag appointment to email to create an email with the details of the appointment

Drag an appointment from the calendar to the Mail Icon.

### 1.4.4 NEW EMAIL CREATED



**Figure 13** – New email created

A new email is created ready for you to address – you can add more detail to the body should you need to.

### 1.5 SNEAK PEEK

Sneak peek is my own terminology. If you hover over the Calendar, People or Task Icons you get to peek into what is there. Handy for quick access to favourite people or to the day’s agenda.

### 1.5.1 HOVER OVER CALENDAR

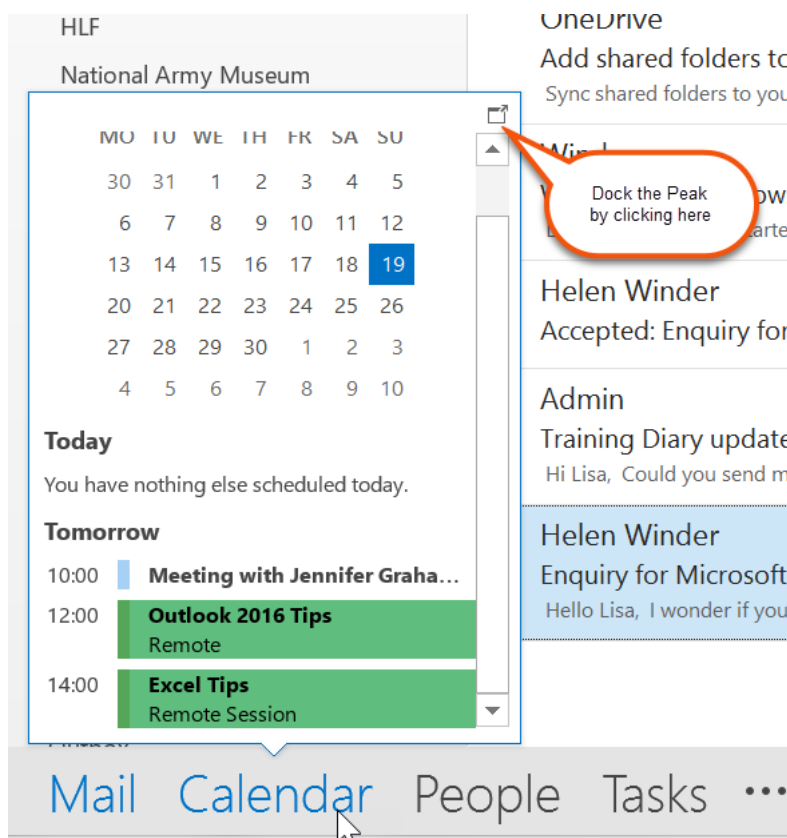


Figure 14 – Peek into the calendar

1. Hover the mouse over the Calendar Icon in the navigation pane
2. A preview of your upcoming appointments pops up with a month to view calendar
3. Click on any day in the calendar to see what is going on that day

Click the Dock the Peek Icon top right to dock the Peek view on the right of the screen in its own task pane.

### 1.5.2 DOCK THE PEEK

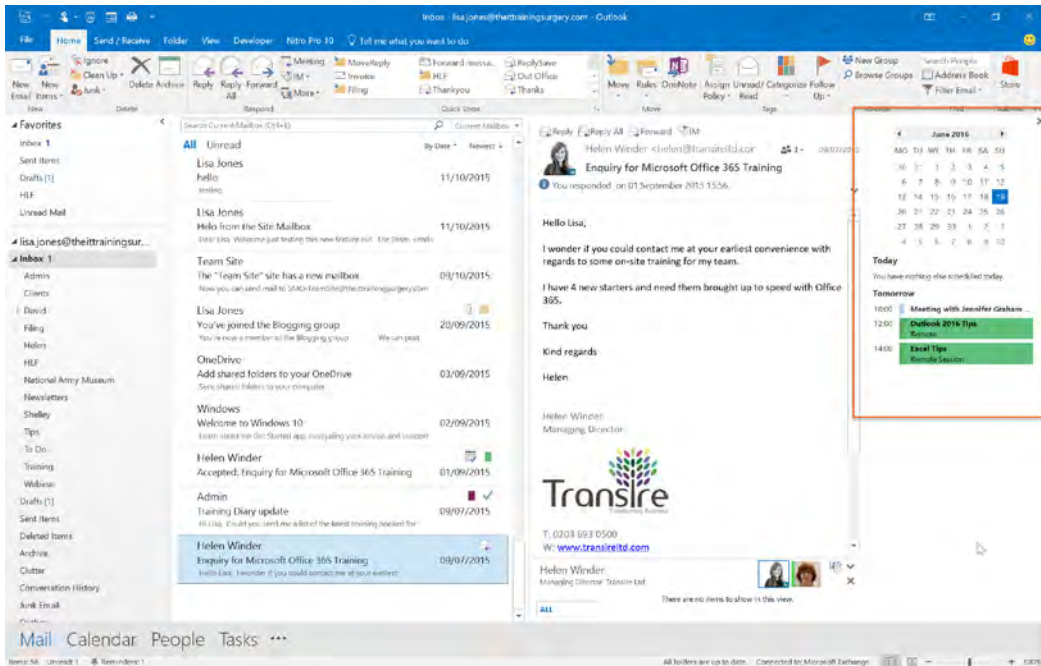


Figure 15 – Dock the calendar peek in the task pane

The calendar in this case docks itself on the right in its own task pane.

### 1.5.3 HOVER OVER PEOPLE

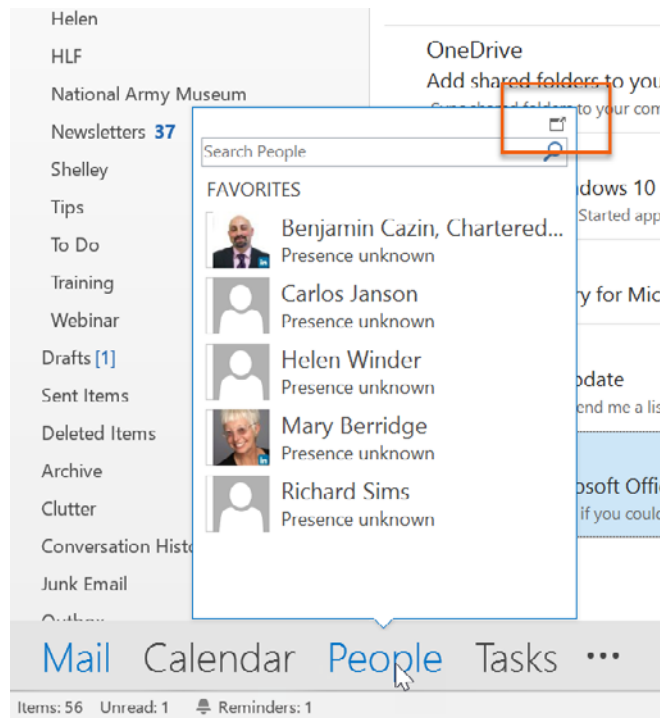


Figure 16 – Peek at people

Hover the mouse over the People shortcut and get a list of favourite people. If the person you want is not in the list, you can search for them from the Search People box at the top.

You can also Dock the Peek on the Task Pane on the right of the screen by clicking on the Dock Peek Icon top right.

### 1.5.4 PEOPLE DOCKED

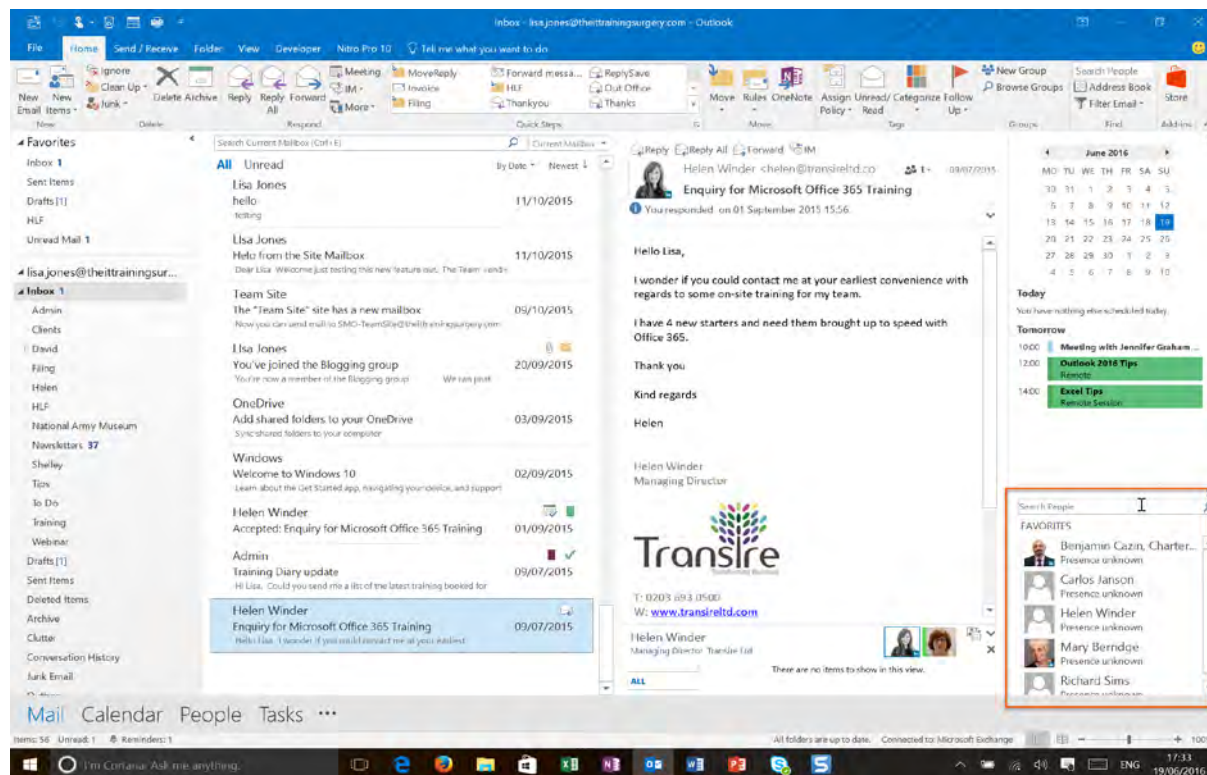
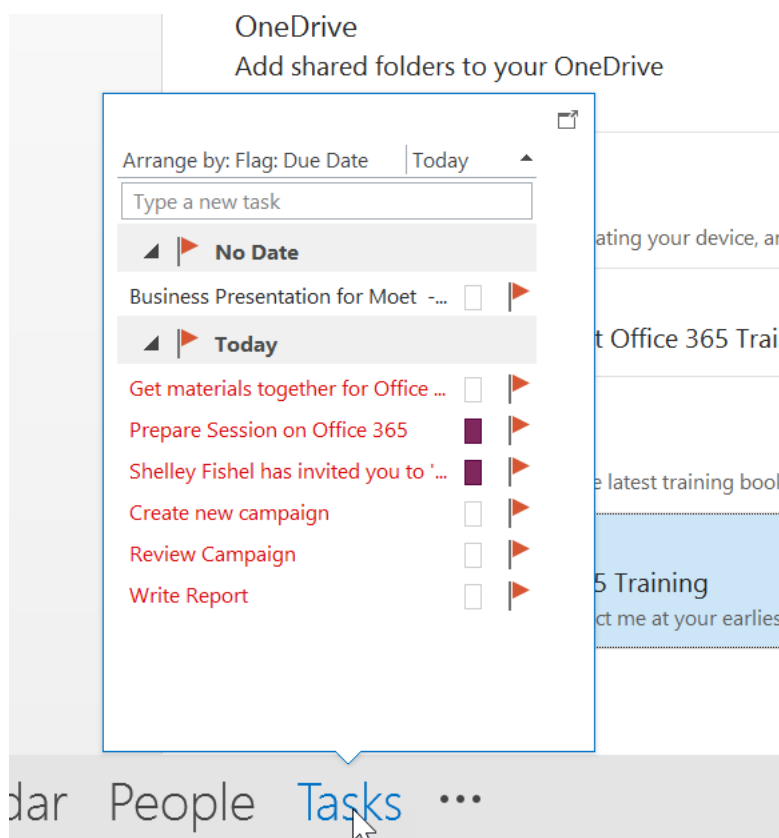


Figure 17 – Dock the people peek in the task pane

As I had already docked the calendar – people are now directly underneath.

### 1.5.5 HOVER OVER TASKS



**Figure 18** – Have a peek at the tasks

Hover the mouse over the Tasks shortcut to see a list of upcoming tasks.

This too can be docked by clicking the Dock Peek Icon.

### 1.5.6 TASKS DOCKED

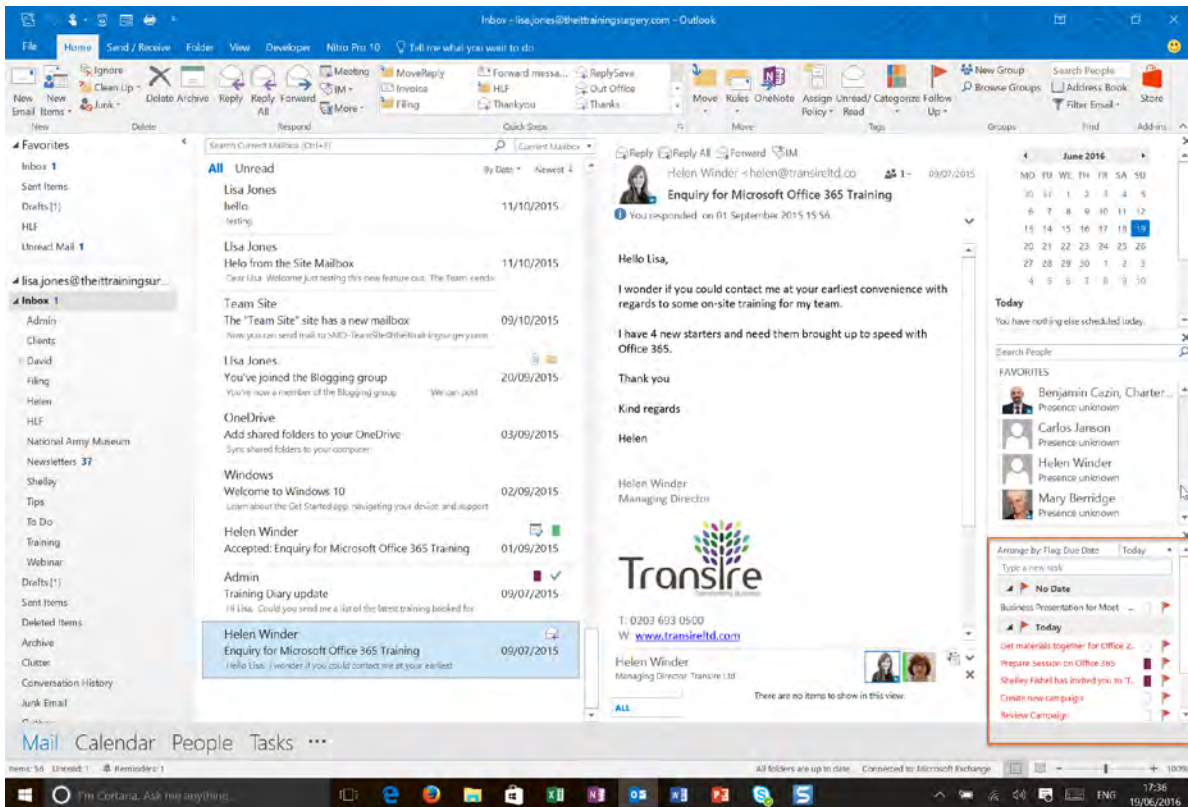


Figure 19 – Dock tasks as well

Having docked the calendar and people Peeks first, Outlook puts the tasks at the bottom. However, the Peeks will appear in whichever order you dock them in.

## 2 MAIL

### 2.1 NEW EMAIL

Sending a new email is the same as in all previous versions. You can click the New Email icon or press the Control and N keyboard combination.

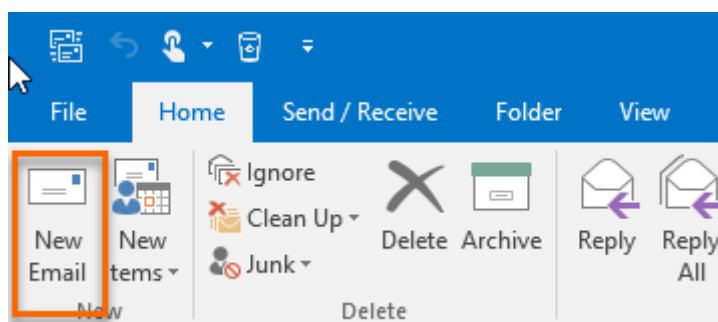


Figure 20 – New email

### 2.2 ADD AN ATTACHMENT

With Outlook 2016 have come new ways of sharing documents with others. You can still attach a file as you are used to, however with collaboration built firmly into Office 365 you can now share a document and send your correspondent a link to the file. This saves on email traffic, storage and means that everyone can have access to the most up to date version of the document.

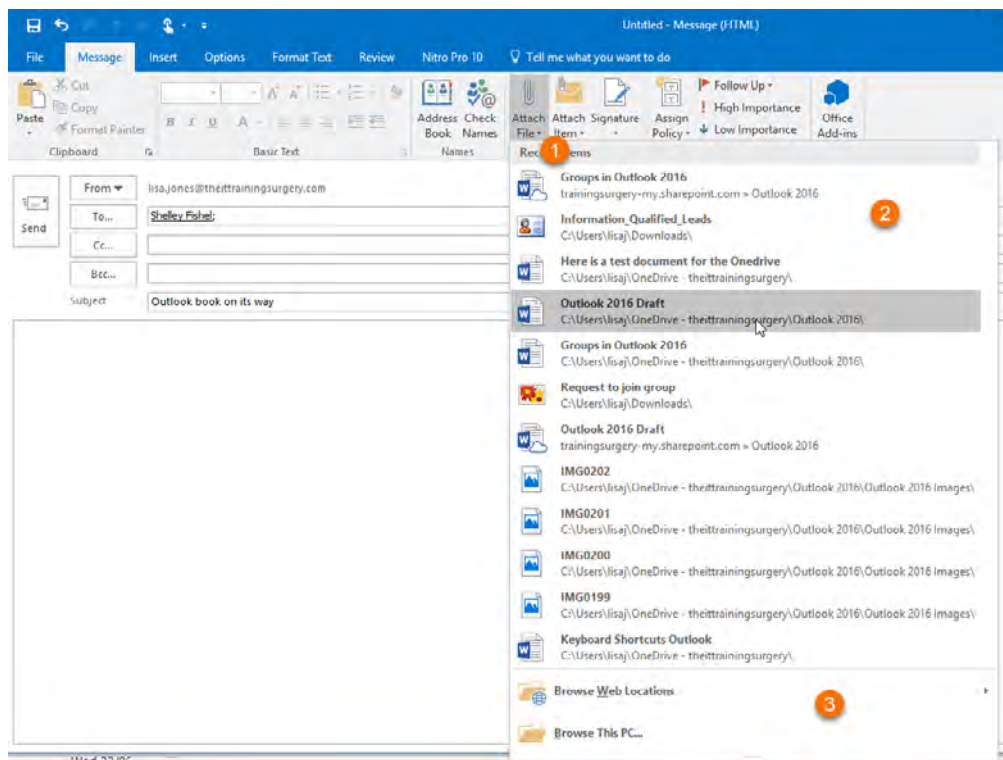


Figure 21 – Add attachment



Discover the truth at [www.deloitte.ca/careers](http://www.deloitte.ca/careers)

**Deloitte.**

© Deloitte & Touche LLP and affiliated entities.

Download free eBooks at [bookboon.com](http://bookboon.com)

Click on the ad to read more

Click Attach file (1) then see a drop down list of recently saved files (2) or look in other locations such as Web Locations or somewhere else on your PC (3).

I love this new feature as I can attach a recent file without going to find it!

### 2.3 ATTACH A COPY

If the file is stored in OneDrive or SharePoint which are online locations, the attachment will have a small white cloud and it will say Recipients can edit (1). This can be changed by clicking on Change Permissions (3) and selecting whether recipients can edit or view (4).

To attach the document as a copy select Attach as Copy (2) this attaches a copy of the document and it is not the one stored online.

When working with others in your organisation it is good to share a link to the document rather than the actual document so that everyone has the most up to date copy. Collaboration is front and centre in Office 2016 and this is one way to encourage it.

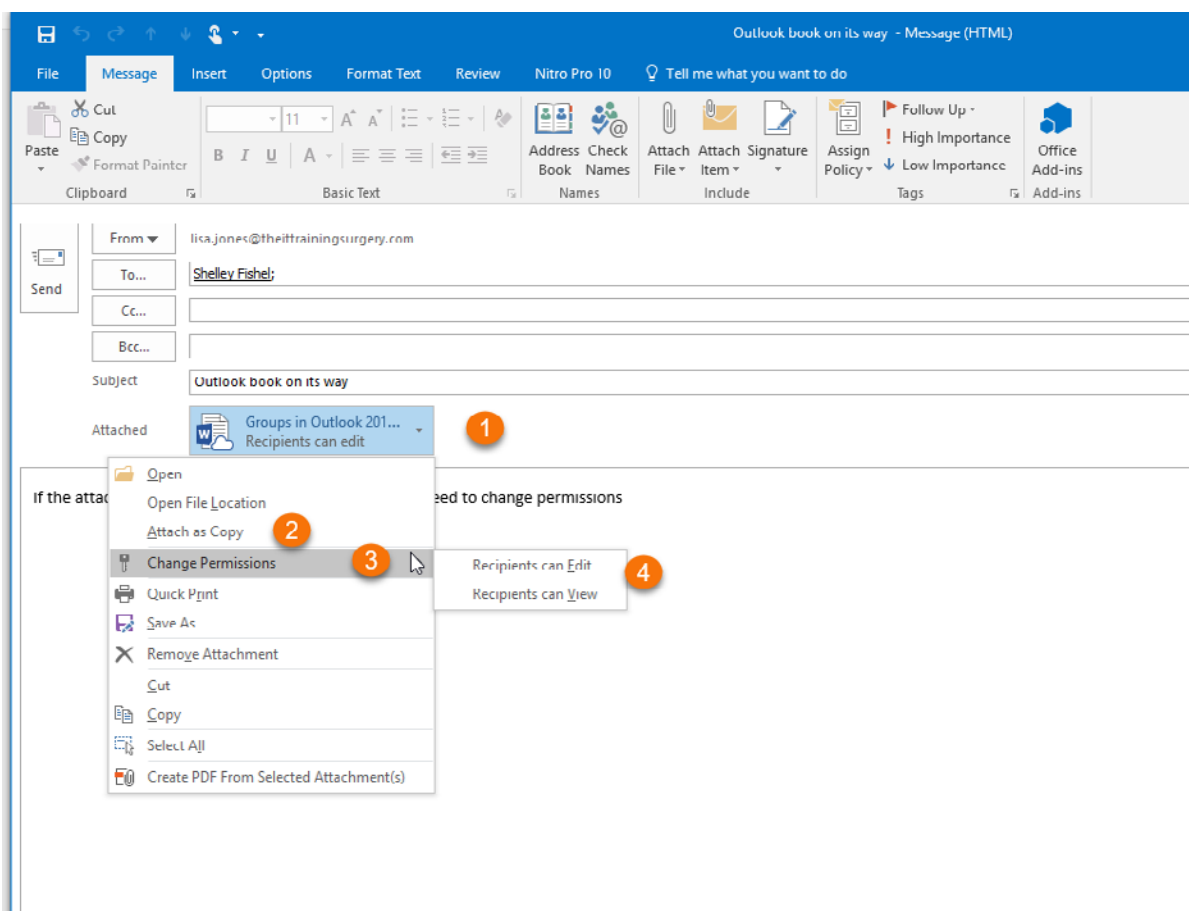


Figure 22 – Attach as copy

## 2.4 REPLY TO AN EMAIL

It is normal to reply to email and this should be done as efficiently as possible.

### 2.4.1 REPLY FROM THE RIBBON

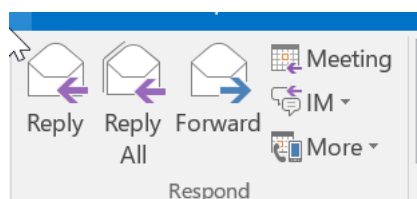


Figure 23 – Mail icons

Use Reply or Reply to All from the Ribbon.

### 2.4.2 REPLY FROM THE TOP OF THE EMAIL



Figure 24 – Icons in the email header

Click the required option right from the top of the email header. Note that in Outlook 2016 you can start an Instant Messaging conversation right from within the email. Take replies out of email and into Instant Messaging for an immediate response.

### 2.4.3 REPLY USING A RIGHT CLICK

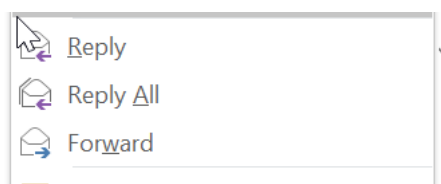


Figure 25 – Right click to respond

Right click on the email you want to reply to and select the type of reply.

### 2.4.4 REPLY OR REPLY TO ALL

When an email is addressed only to you, it is a simple thing to hit reply and respond to the person sending the email. However, if you have been copied in to an email, you may have to think a little more carefully.

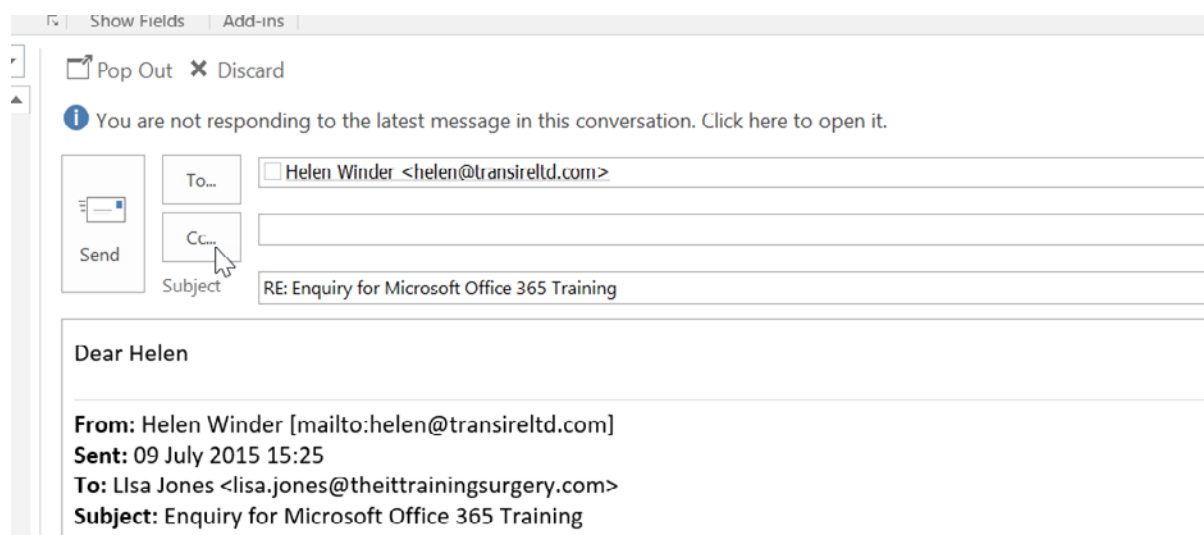
Do you want to reply to everyone or perhaps just to the person who sent the email. If you want to reply to everyone, then use Reply to All. Otherwise just reply to the sender.

## 2.5 POP OUT OR DISCARD

When you receive an email and wish to reply, the reply sits inside the Reading Pane. This allows you to type a quick response and send. However if you want to add extras to your email or get access to formatting options, you will need to Pop Out the email so that you can edit it in its own window.

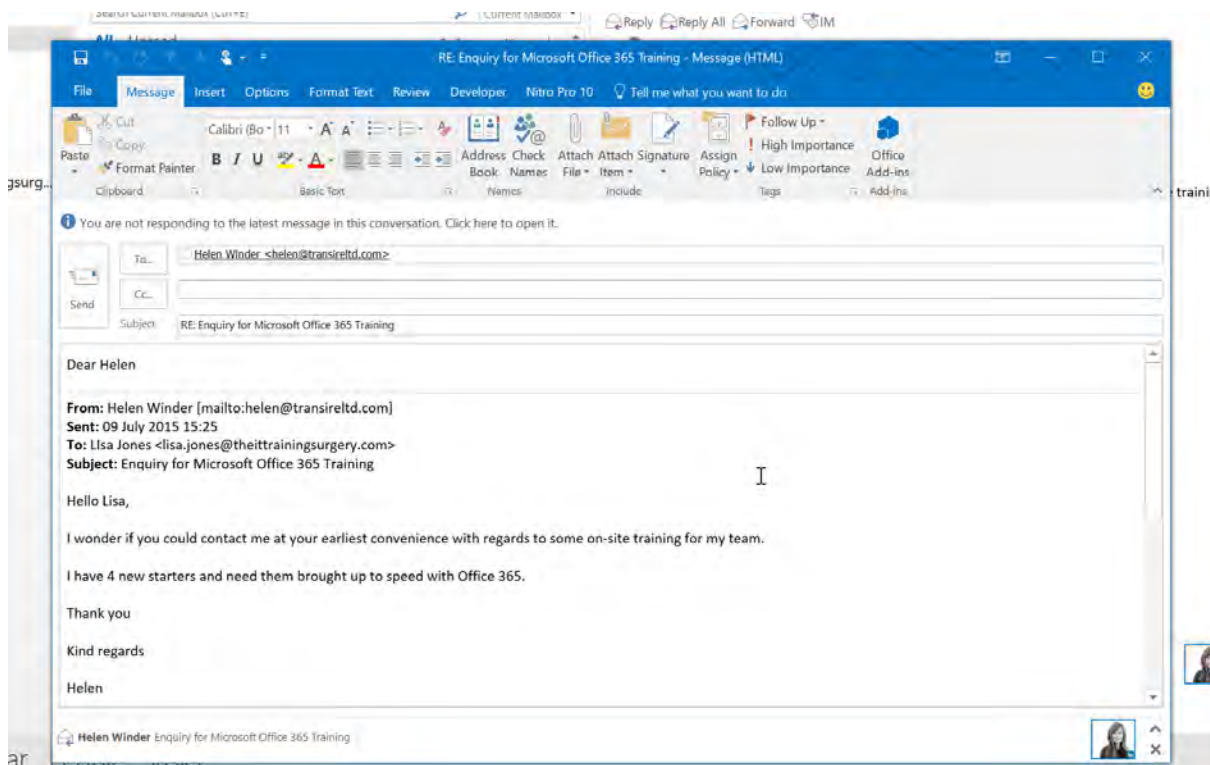
If you decide that you don't like what you have written when responding in the Reading Pane you can discard your changes. Otherwise Outlook saves a draft of the message.

### 2.5.1 POP OUT



**Figure 26** – Pop out to edit with full capability

## 2.5.2 EMAIL POPPED OUT

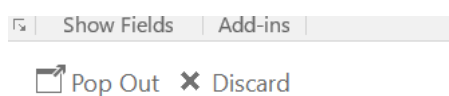


**Figure 27** – Full email editing

Here is the email above now open in its own window. Access to all the Ribbon tabs is now available and full editing can take place.

Finish off the email and click Send.

## 2.5.3 DISCARD



**Figure 28** – Don't like what you did, simply discard

If you start to make changes to the reply in the reading pane, and then decide that you don't want to keep them, click Discard and the reply is discarded.

## 2.6 REPLY WITH MEETING

Let me set the scene. Joe writes to you with a whole long screed and amongst it all is the need to get together and discuss the points raised. Normally you would go to your Calendar and start a meeting request to send to Joe. Now you can simply reply to his email with a meeting request!

### 2.6.1 REPLY WITH MEETING

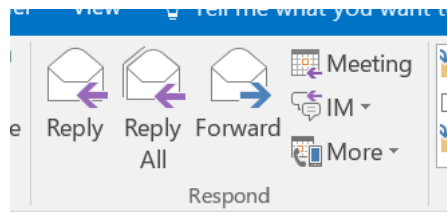


Figure 29 – Reply with meeting icon

In the Respond Group on the ribbon click Meeting.

### 2.6.2 SET UP THE MEETING REQUEST

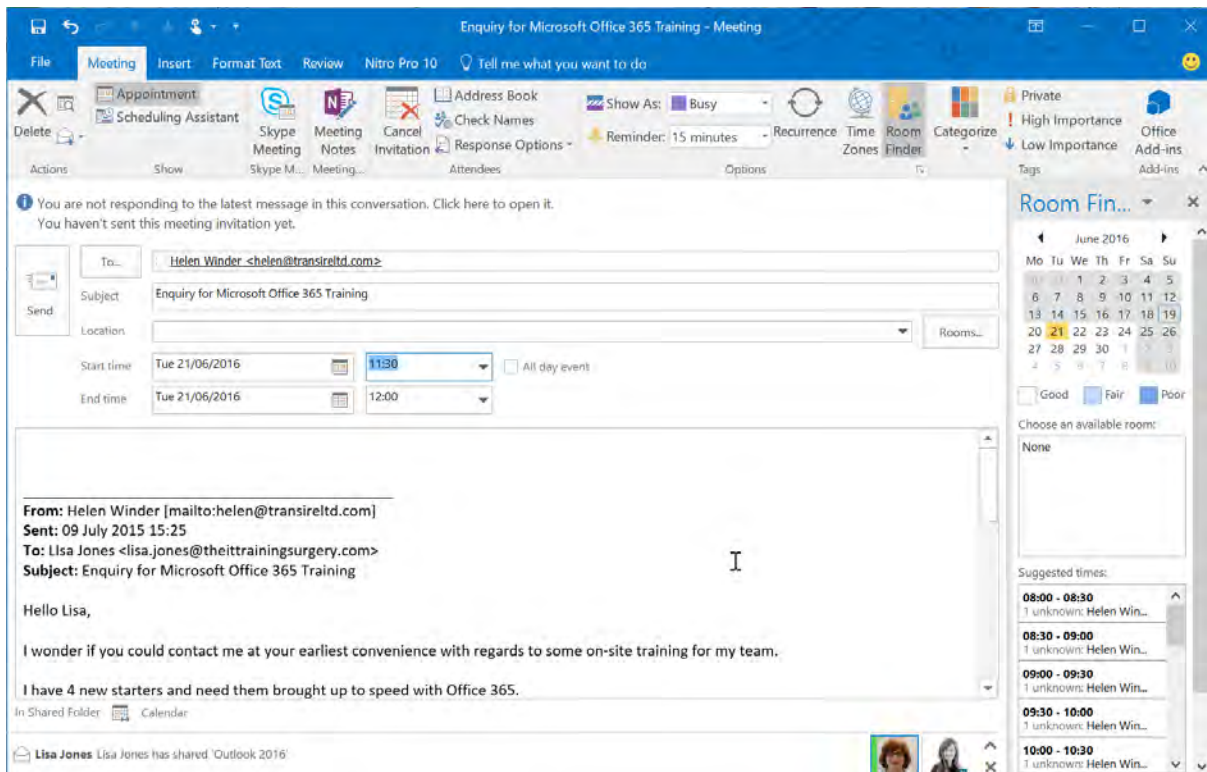


Figure 30 – Create the meeting as normal

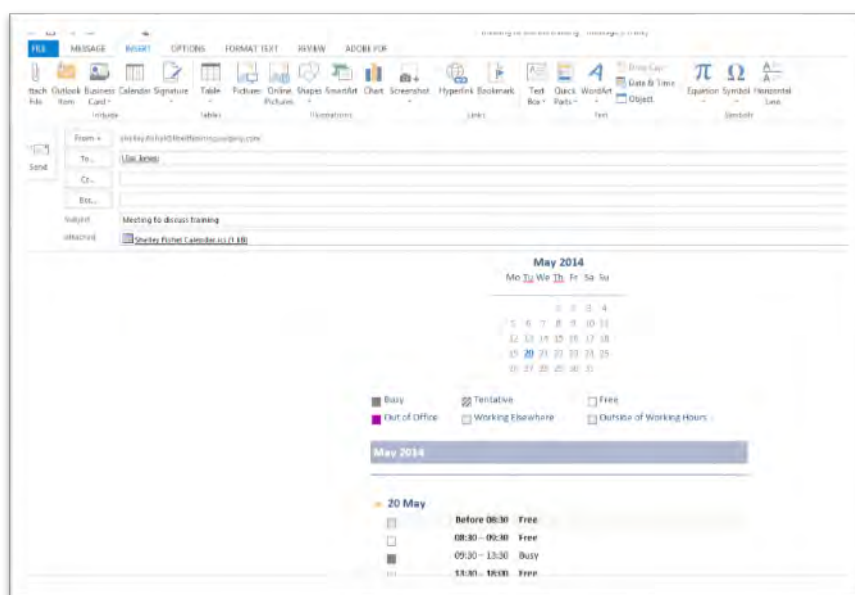
A meeting request is generated complete with the email address of the person who you are replying to and ready for you to add date and time to the meeting.

When you have completed it click Send.

## 2.7 INSERT A COPY OF YOUR CALENDAR

Along similar lines as Reply with Meeting. Here is the scenario. In the example here, Shelley needs to have a meeting with Lisa. In order to make it easy for Lisa to choose a date and time for the meeting, Shelley sends Lisa an email with a copy of her calendar for the next day. Lisa can see when Shelley is free or busy and can respond accordingly.

### 2.7.1 EMAIL WITH CALENDAR



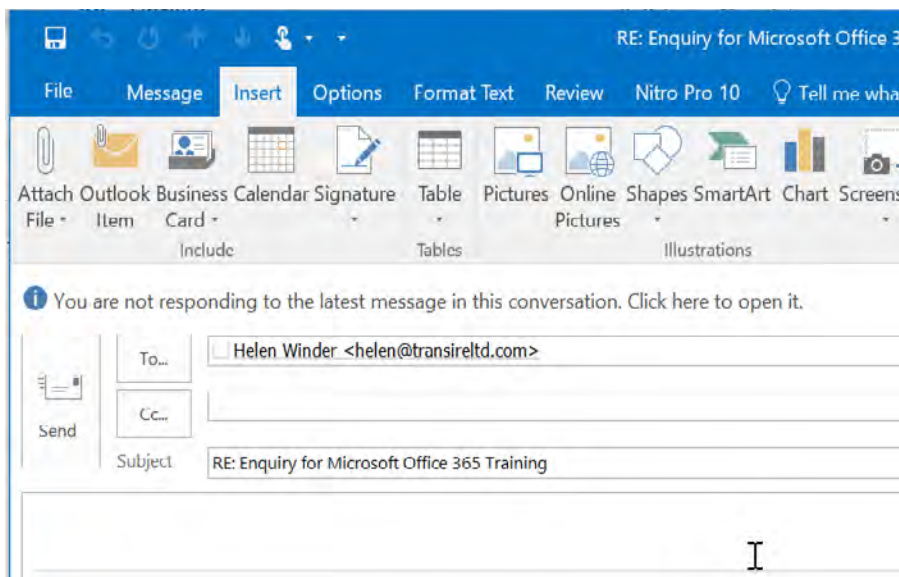
**Figure 31** – Add a copy of your calendar

Let's see how to create this.

### 2.7.2 INSERT CALENDAR

There are two ways we can do this. One when the reply message stays in the reading pane and the second when you pop out the reply message.

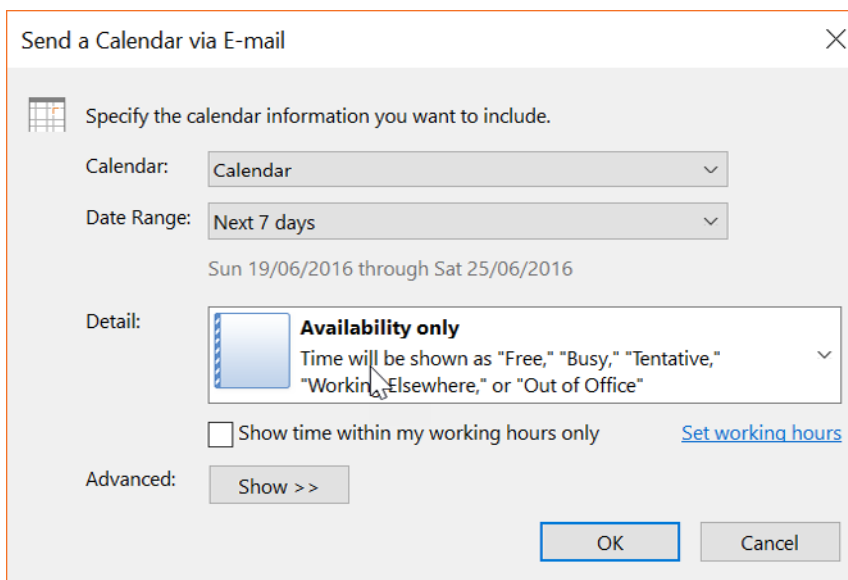
First we will see how to reply with a copy of the calendar having popped the reply out into its own window.



**Figure 32** – Insert calendar icon

1. Open the email you want to reply to
2. Click Reply
3. Now click into the white space where you write
4. Click the Insert Ribbon
5. Click Calendar

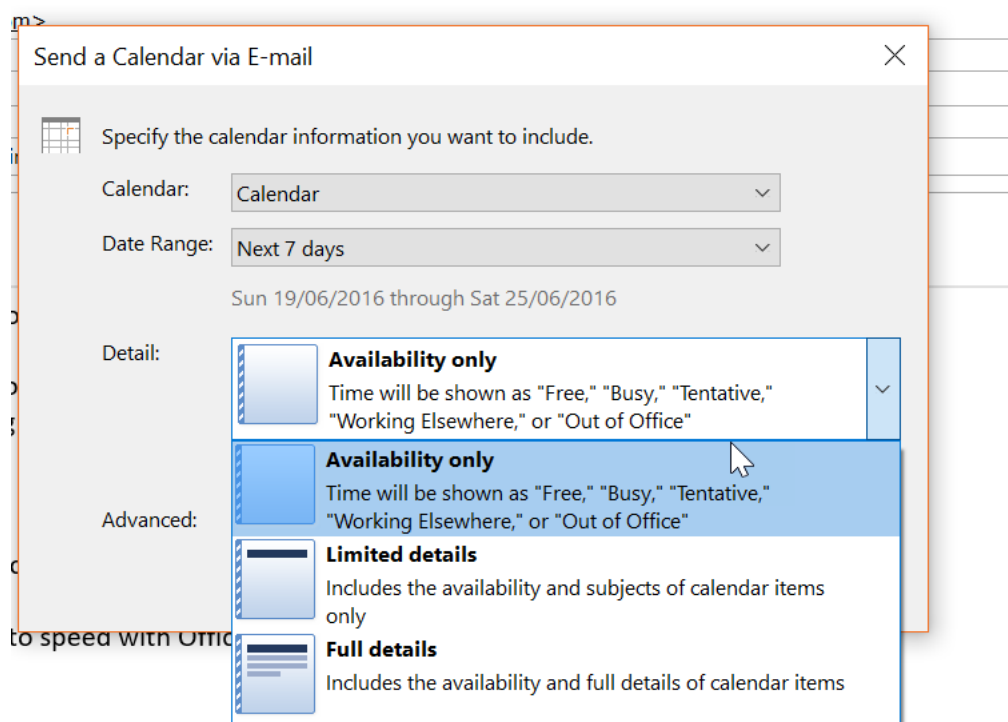
### 2.7.3 SELECT THE DATE RANGE



**Figure 33** – Specify the date range

Specify the Date Range.

## 2.7.4 ADD DETAIL



**Figure 34** – Specify the detail visible

Set which of the options you wish to show:

**Availability only** – this shows time as Free, Busy, and Tentative etc. The recipient will not be able to see what you are doing.

**Limited details** – Includes the subject of the calendar items.

**Full details** – Shows availability and full details of calendar items.

### 2.7.5 A COPY OF YOUR CALENDAR IS ADDED TO THE EMAIL

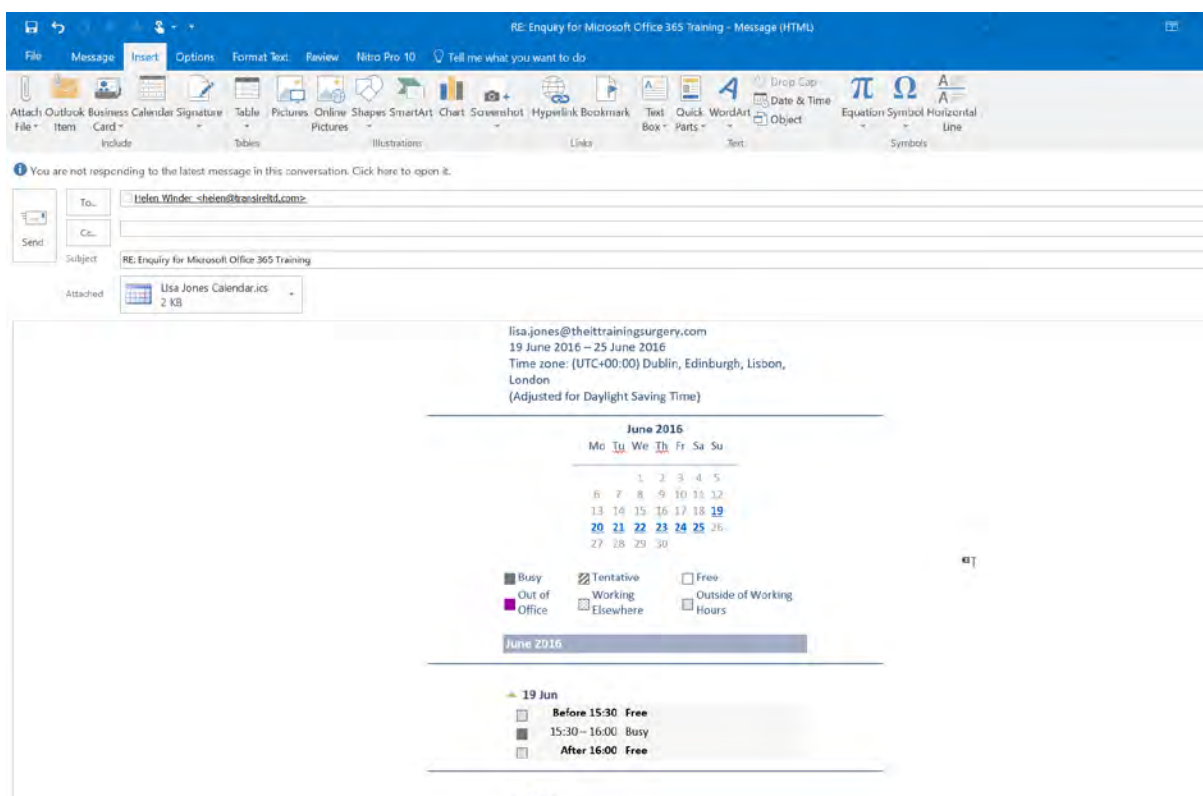


Figure 35 – Copy of your calendar is inserted

Type the message at the top of the email and click Send.

### 3 EMAIL OPTIONS

Options you can set for email:

**Change the Theme Colours, Fonts** etc. – change how your email will look.

**Show Fields** – decide if you wish to have the BCC – Blind Carbon Copy Field or the from field showing.

**Set Permissions** – use Rights Management Software to control what recipients can do with the email.

**Use Voting Buttons** – get your respondents to vote on a topic.

**Request a Delivery Receipt** – get an email telling you that your email was delivered.

**Request a Read Receipt** – make a window pop up so that the recipient can let you know whether they received your email.

© 2013 Accenture. All rights reserved.

be > your degree

Bring your talent and passion to a global organization at the forefront of business, technology and innovation. Discover how great you can be. Visit [accenture.com/bookboon](http://accenture.com/bookboon)

Be greater than.  
consulting | technology | outsourcing

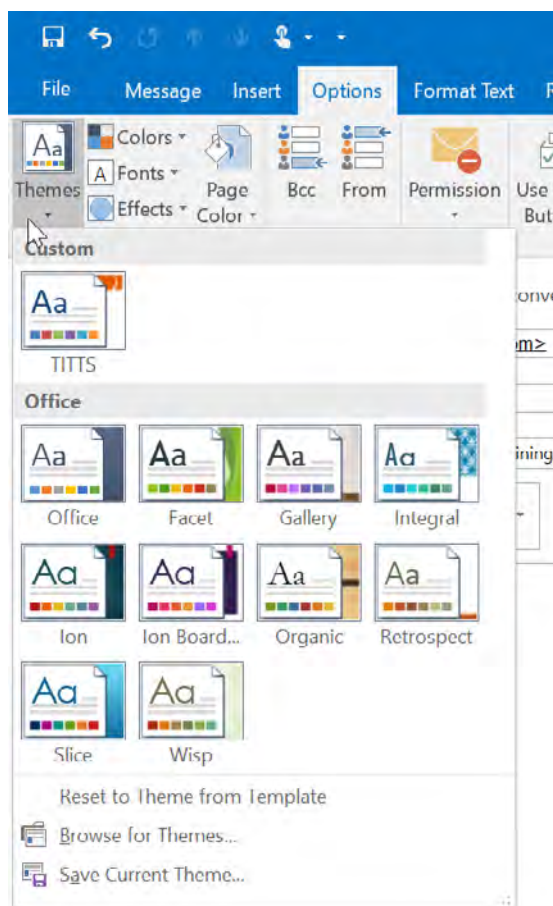
accenture  
High performance. Delivered.

**Save Sent Item to** – use this to change where your sent item is saved.

**Delay Delivery** – set the time that the email should be sent.

**Direct Replies to** – arrange for replies to be sent to someone else.

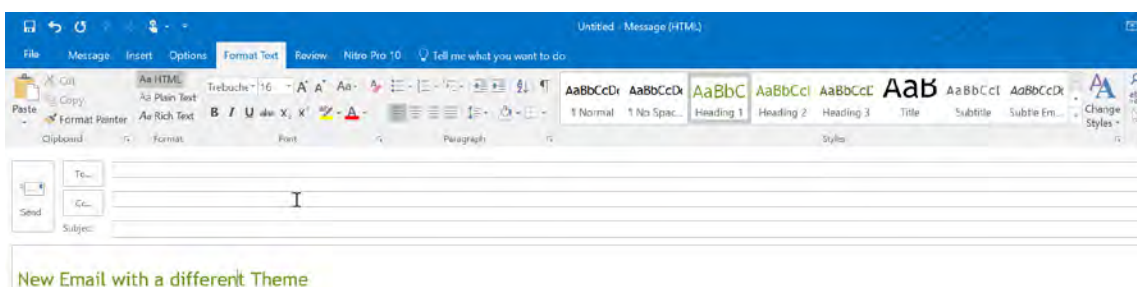
### 3.1 THEMES



**Figure 36** – Themes govern design

1. In a new email, click the drop down under Themes
2. Select a Theme from those on offer
3. The Theme of the email will change, this means that formatting will take on the styles of the selected theme.

### 3.1.1 FORMATTING TAKES ON THE NEW THEME



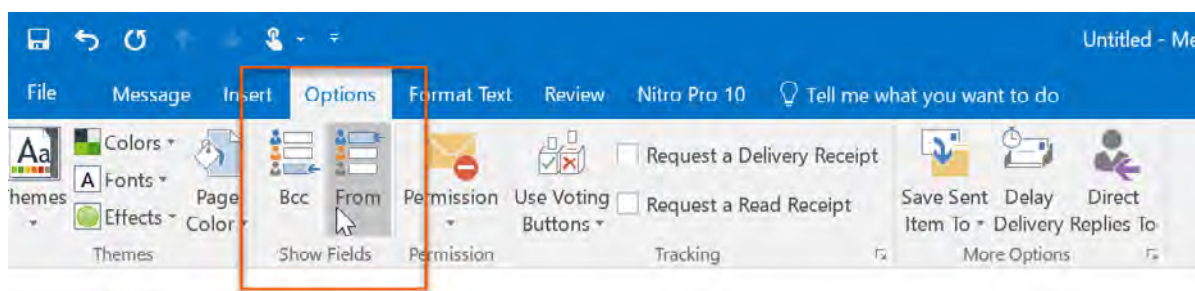
**Figure 37** – See the format available with the chosen theme

4. Click on the Formatting Ribbon

Note that the styles have changed to reflect the new theme.

## 3.2 SHOW FIELDS

### 3.2.1 SHOW FIELDS



**Figure 38** – BCC, and from can be displayed

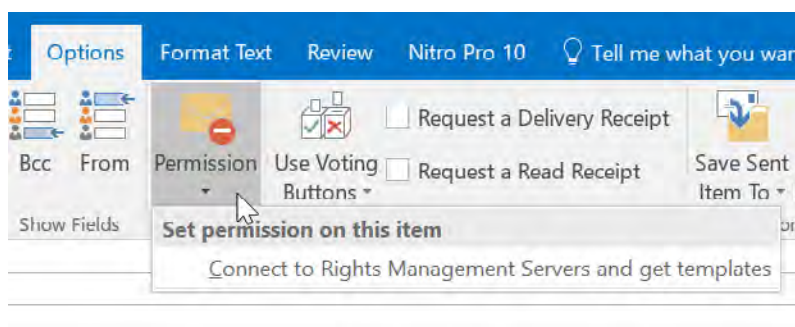
Click BCC to display the option of copying in someone blind. Meaning that the person you are writing to does not know that a copy was sent to someone else.

Click From to send email from other email accounts rather than your main one. If you have a personal account and a work account in Outlook you can decide here which account to send the email from.

## 3.3 PERMISSION

Permissions allow you to control what can be done with an email.

### 3.3.1 PERMISSION



**Figure 39** – Connect to information rights management to control permissions

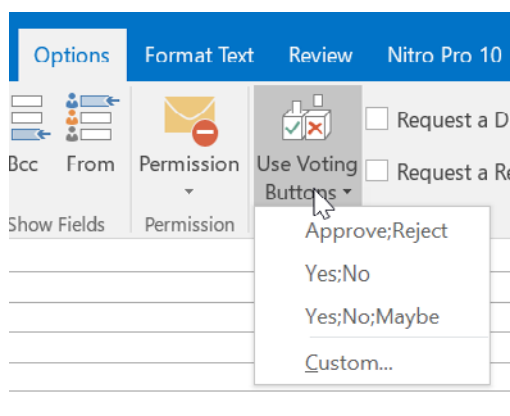
If your organisation is using Information Rights Management you can decide what your recipients can do with the message. You control whether they can forward, print attachments or even read the email.

To use this feature you will need to connect to an Information Rights Server.

### 3.4 VOTE

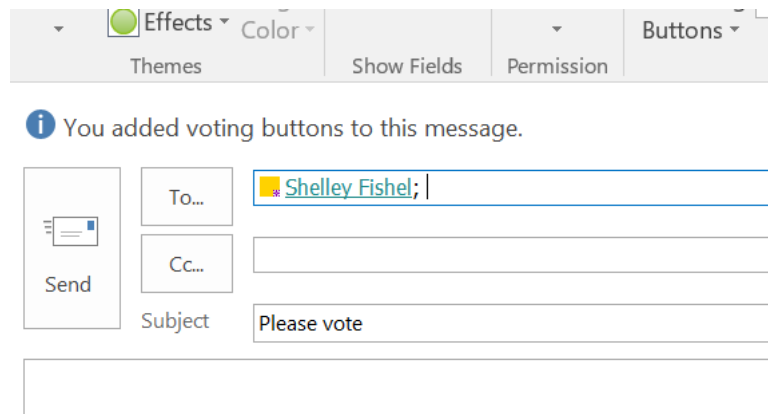
You can get your recipients to vote. You know, which pub shall we go to for drinks after work, or do they accept or reject a topic.

#### 3.4.1 STANDARD VOTING BUTTONS



**Figure 40** – Add voting buttons to an email

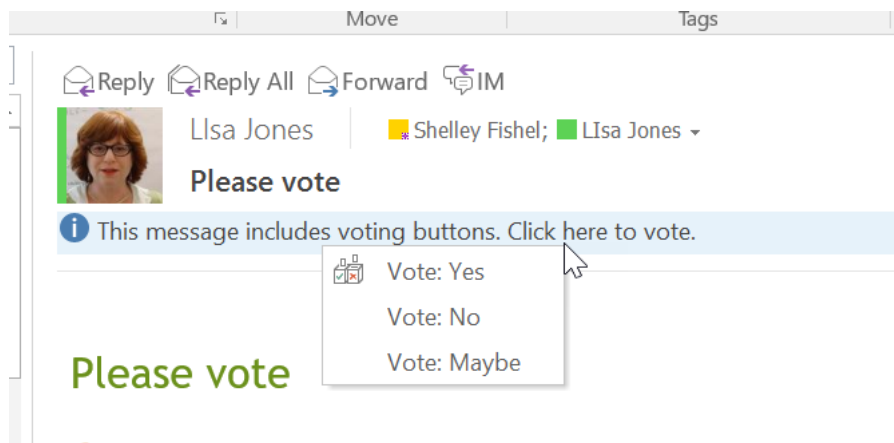
1. Click the drop down under Use Voting Buttons
2. Select the options to use
3. You see a message in the header



**Figure 41** – See the buttons have been added

You see a message telling you that Voting Buttons have been added.

### 3.4.2 CLICK HERE TO VOTE

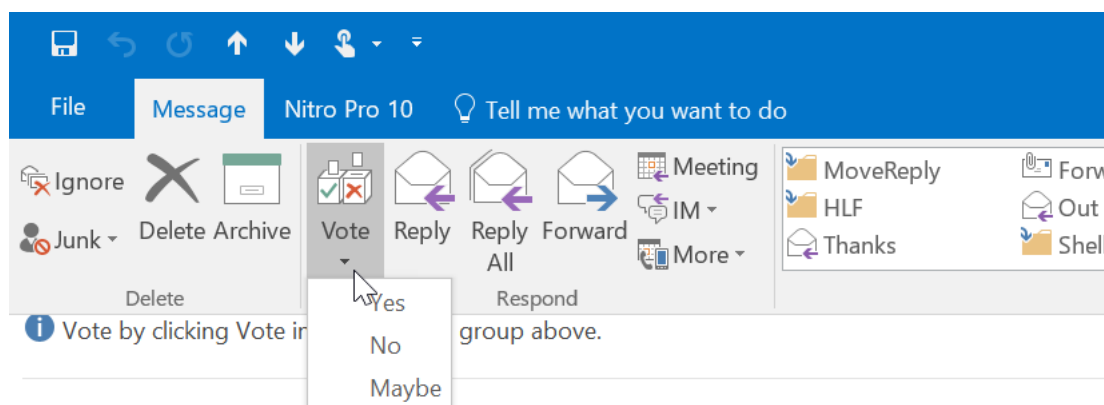


**Figure 42** – Recipient sees click here to vote

If your recipient does not actually open the email, they can still vote. They will need to click on the Click here to vote link at the top of the email.

Click the Button to vote.

### 3.4.3 OPEN THE EMAIL TO SEE VOTING BUTTONS



Please vote

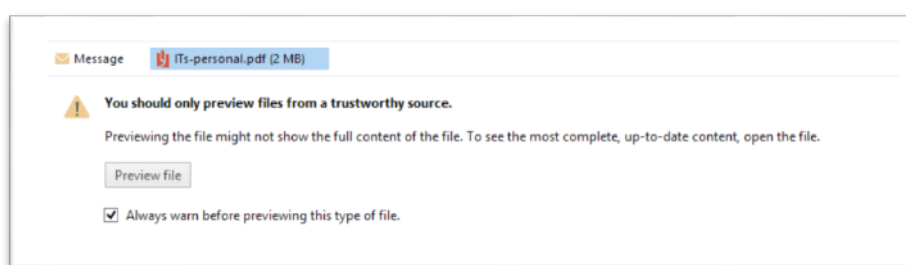
**Figure 43** – In the email received the buttons are visible

The recipient opens up the email to see the vote options displayed on the ribbon.

## 3.5 PREVIEW ATTACHMENTS

How often do you want to see the content of a document attached to an email without actually opening the document? Or perhaps you have been sent several documents and you are not sure which one to open? Now you can preview attachments in Outlook before deciding whether to open them or not.

### 3.5.1 PREVIEW AN ATTACHMENT



**Figure 44** – Preview an attachment to see if you want to open it

Click on the attachment in the message.

The first time you preview a document you will see the message above warning you that you may not see the whole file. If you are happy then click Preview File.

### 3.5.2 THE FILE IS PREVIEWED IN THE EMAIL

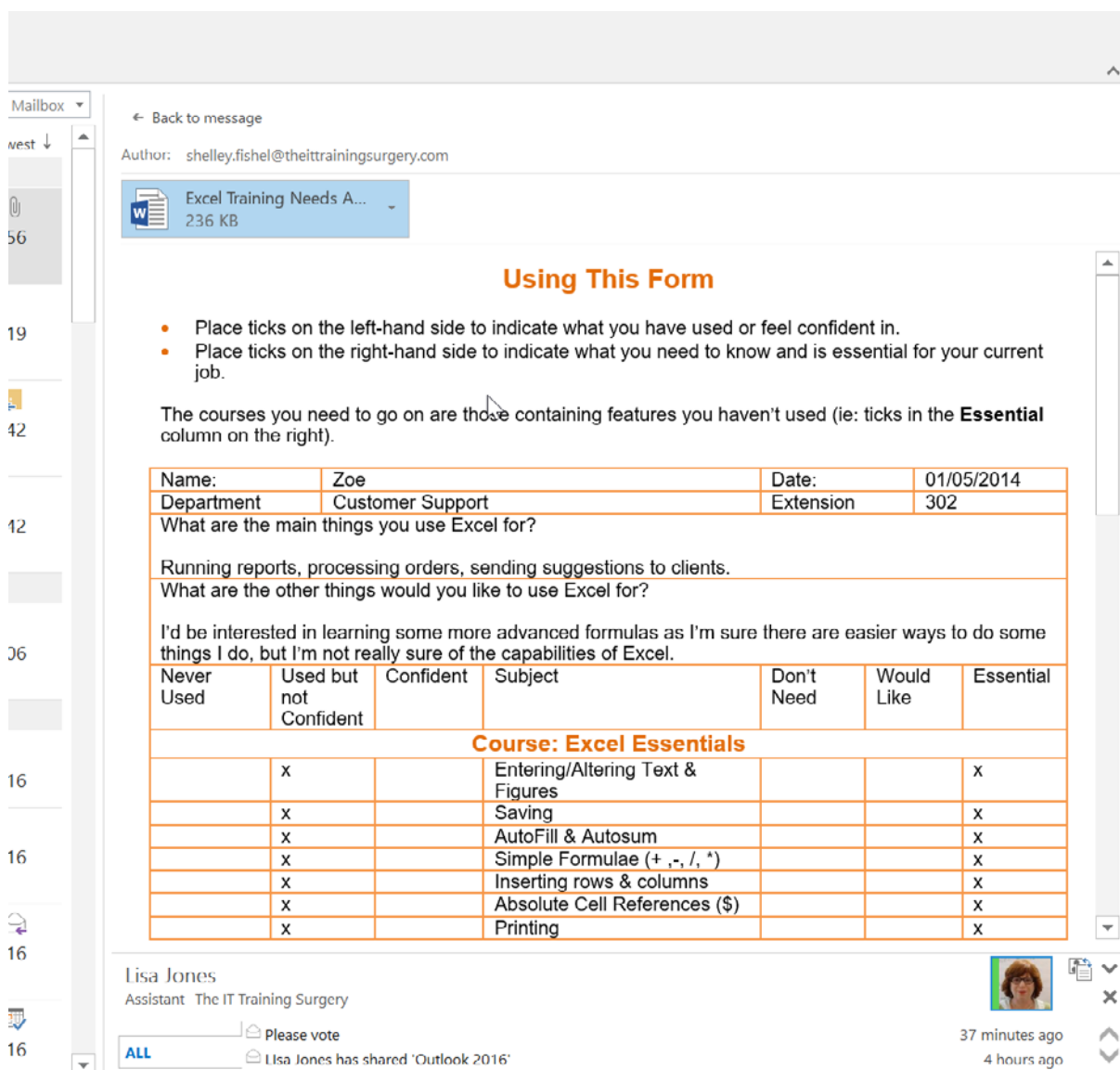


Figure 45 – File opens inside the email in Outlook

A copy of the file opens up inside the email and you can then decide whether to open it in full.

### 3.5.3 OPEN THE ATTACHMENT

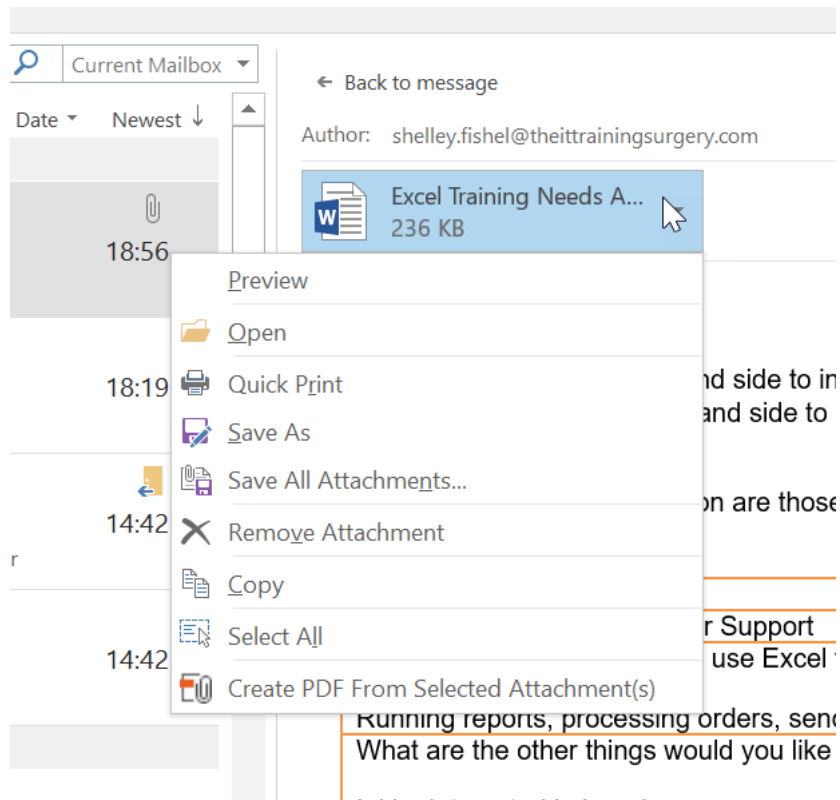


Figure 46 – Open the attachment as normal

To open the attachment Right Click on the attachment or click the drop down arrow on the attachment and then select Open.

### 3.5.4 TO CLOSE THE PREVIEW

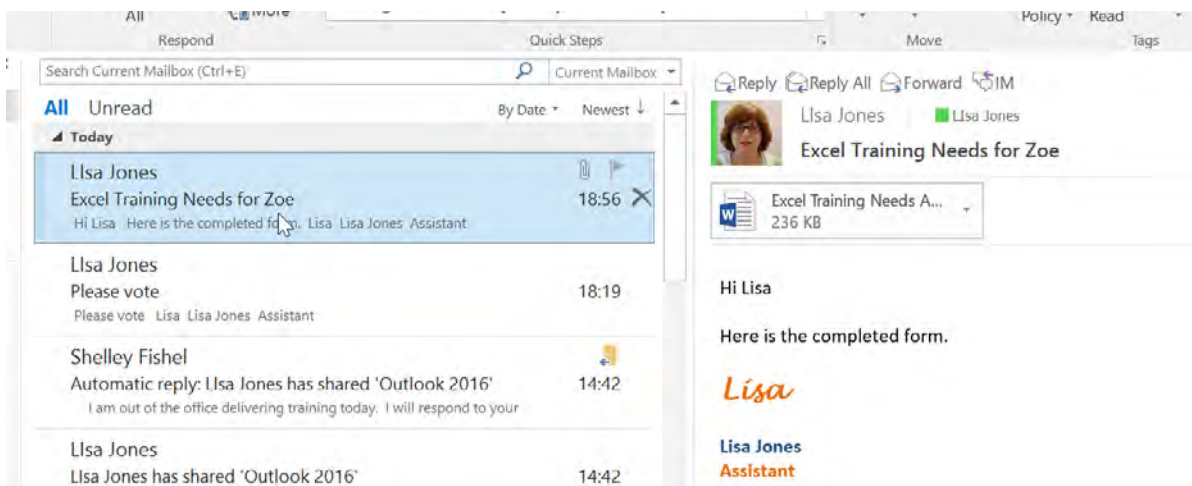


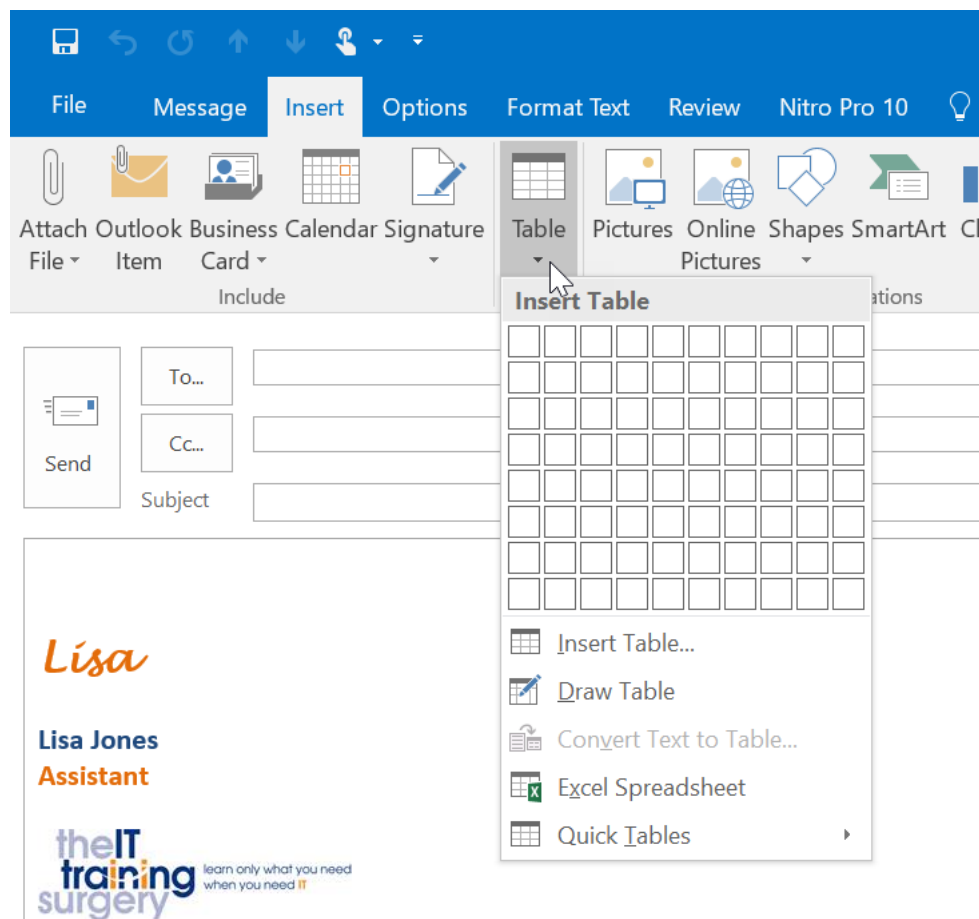
Figure 47 – Click back on the email to close the preview

Click on the Email Header in the email list and the preview will close.

## 3.6 INSERT AND FORMAT A TABLE

As versions of email have become more and more sophisticated, we are using email for documents instead of written letters. This means that we want to add elements to our email just like we would to documents. Here we see how to add a table.

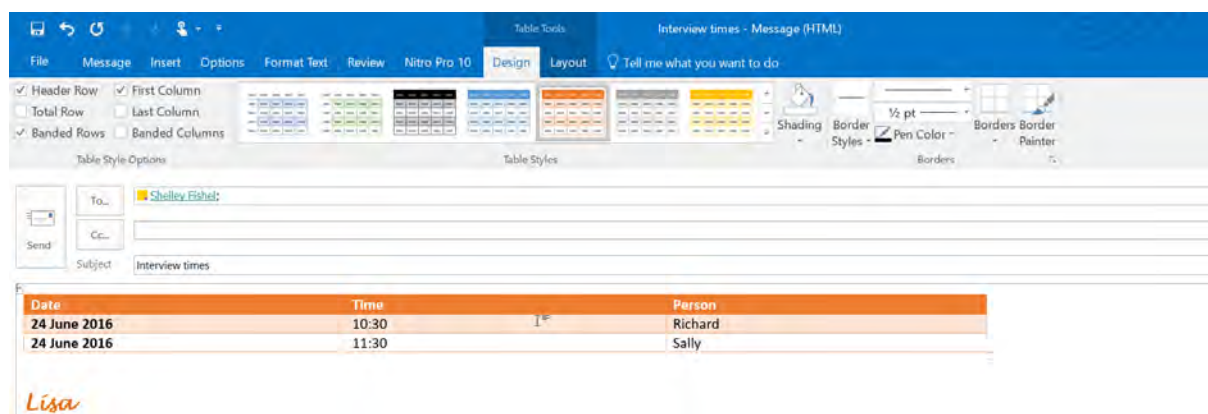
### 3.6.1 INSERT A TABLE



**Figure 48** – Insert a table into your email

1. Click into the body of the email
2. Click on the Insert Ribbon
3. Click on the drop down under Table
4. Select the number of squares you want as columns and rows

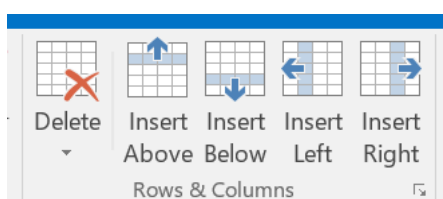
### 3.6.2 FORMAT THE TABLE



**Figure 49** – Use familiar formatting tools

1. Click inside the table
2. Click into the Table Styles gallery
3. Select the style to apply
4. The table is now reformatted

### 3.6.3 ADD COLUMNS AND ROWS



**Figure 50** – Add columns and rows

1. Click into a column
2. Click the icon that inserts a column Left or Right
3. Click the icon that inserts a row Below or Above

### 3.6.4 FORMAT THE TABLE JUST LIKE IN WORD

You can format the table just like you can in Microsoft Word. All of the same formatting options are available.

## 3.7 INSERT A PICTURE

Email is often the vehicle of choice for the delivery of pictures. Thousands of pictures are sent around the globe via email all the time. Here is how to attach an image to your email.

### 3.7.1 INSERT A PICTURE FROM YOUR COMPUTER

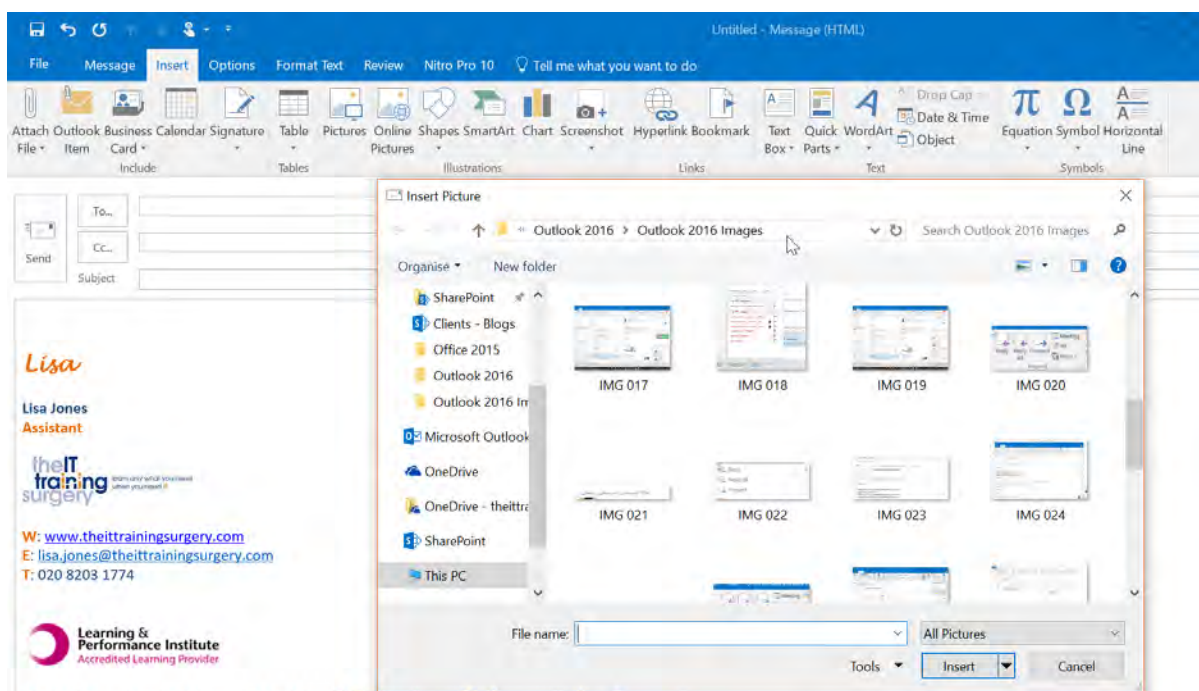


Figure 51 – Add a picture into the email

1. In the body of the email click on the Insert Ribbon
2. Click Pictures
3. Navigate to the folder where the picture is stored
4. Click Insert

### 3.7.2 FORMAT PICTURE TOOLS

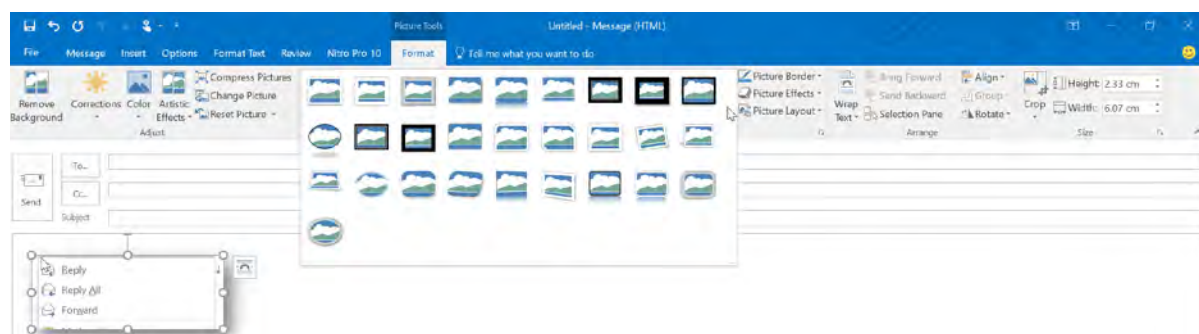


Figure 52 – Use the picture tools to format the picture

Now that a picture is in the body of the email, whilst it is selected the Picture Tools Format Ribbon appears. Here you can add a border, compress the image or in fact do any type of picture editing available.

### 3.7.3 INSERT AN ONLINE PICTURE

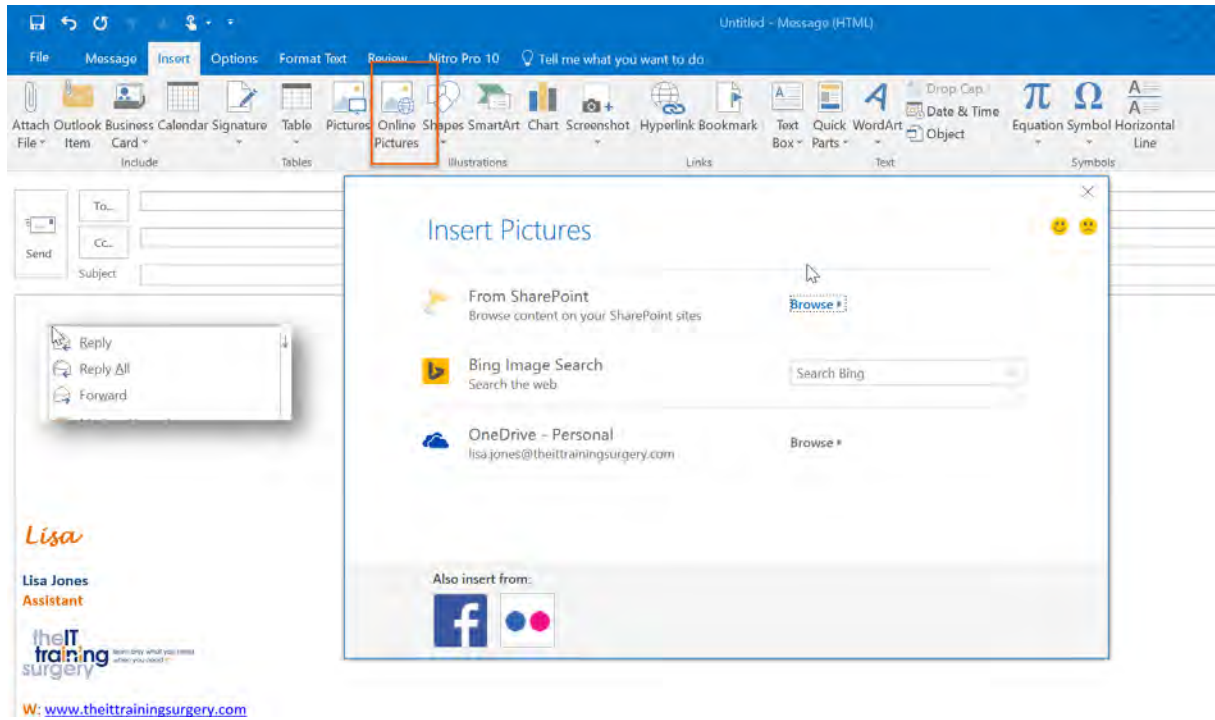


Figure 53 – Insert a picture from a web location

What if you could build your future and create the future?

The innovation accelerator

One generation's transformation is the next's status quo. In the near future, people may soon think it's strange that devices ever had to be "plugged in." To obtain that status, there needs to be "The Shift".

Alcatel-Lucent 

[www.alcatel-lucent.com/careers](http://www.alcatel-lucent.com/careers)

Pictures can be retrieved from online storage as well as from the Pictures folder on your PC.

1. From SharePoint – if you are using SharePoint or OneDrive for Business to keep organisational images and the SharePoint or OneDrive folders are synchronized with your computer, you will see this option. Browse for the image and click Insert.
2. Search for an image that makes your point using Bing Image Search – remember to take care with copyright.
3. OneDrive – OneDrive is your personal online storage that comes with either your personal Outlook.com or Hotmail account or with your Organisational account – find images you have saved here.
4. Flickr and Facebook – connect these online social sites to Outlook and retrieve pictures you have uploaded to them.

### 3.8 ADD A CHART

Not only can you add a table to an email, charts can be added as well.

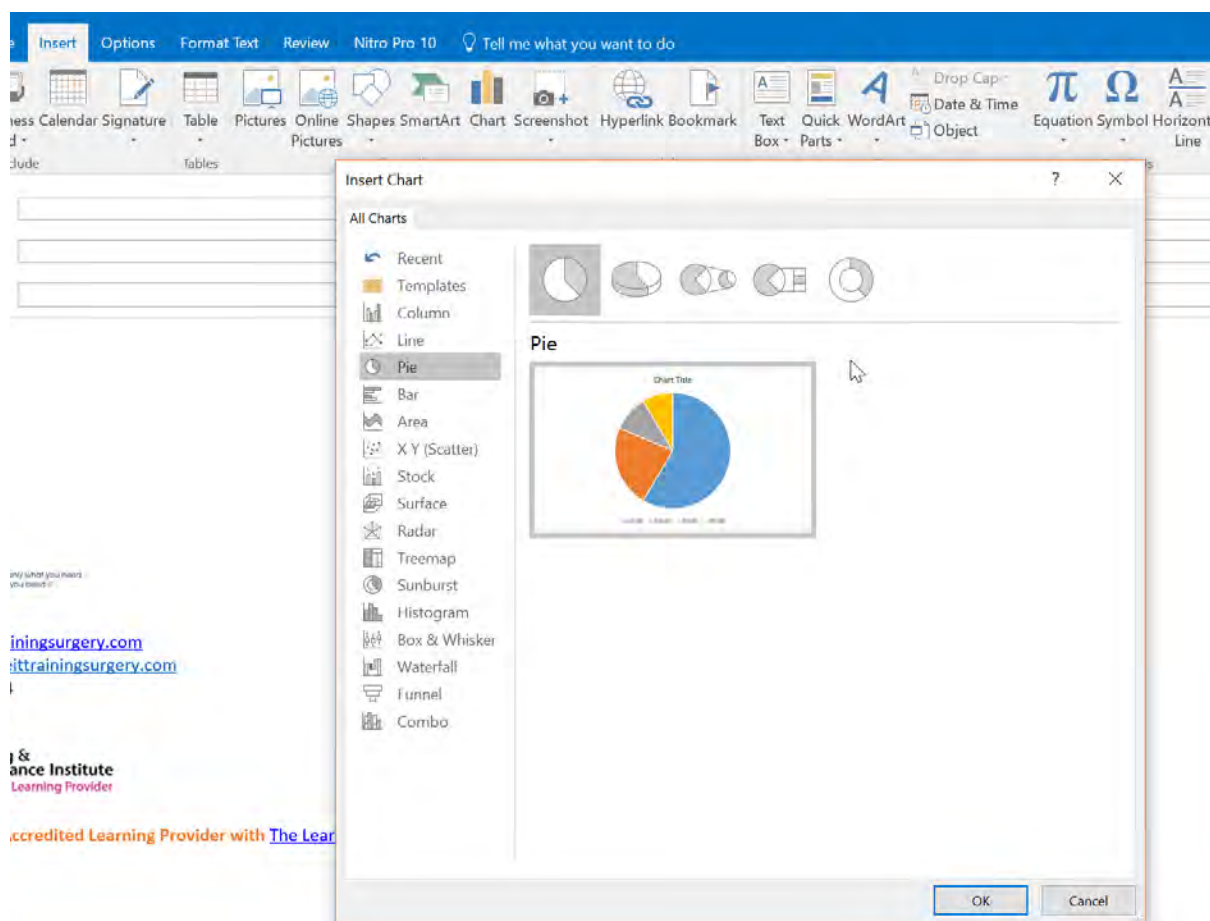
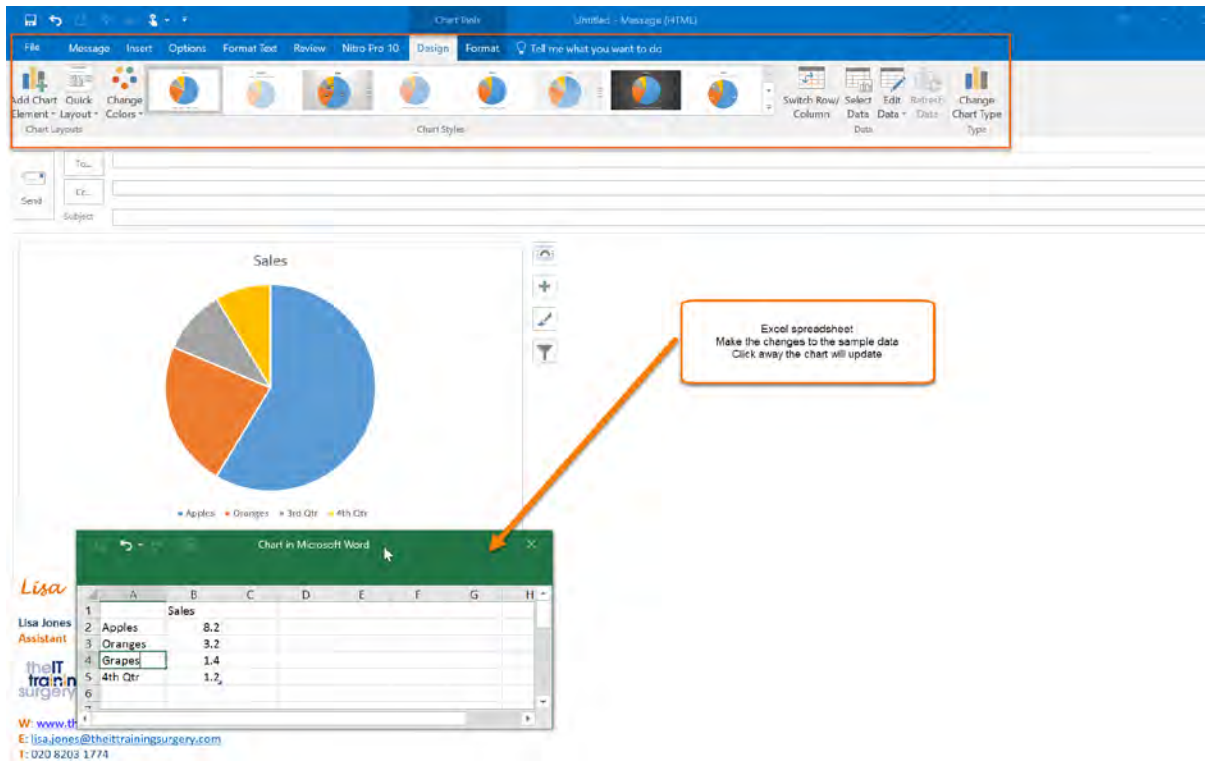


Figure 54 – Add a chart

1. In the email click the Insert Ribbon
2. Click Chart
3. Select the chart type to create



**Figure 55** – Make the changes

Make any changes you need to the data in the sample spreadsheet that opens up. As you change the data, you will see the chart change.

Anything that you can do in Excel can be done here in Outlook.

# 4 CREATE A SIGNATURE

Why type your signature each time you send an email? Have Outlook do it for you. Signature options can be accessed from two places.

The Insert Signature option on the Message Ribbon

Via Outlook Options – File – Options – Mail – Signatures

## 4.1 CREATE A SIGNATURE

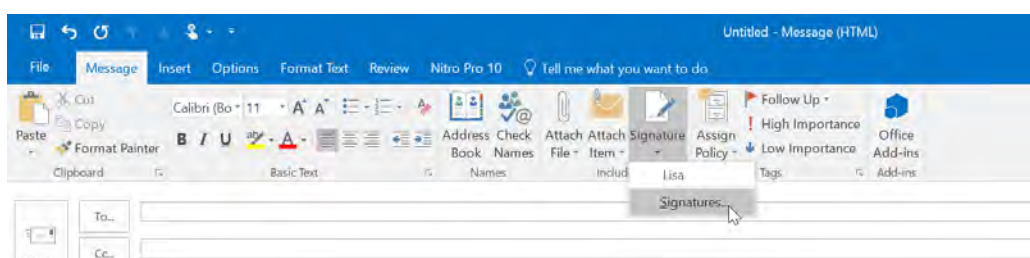


Figure 56 – Insert a signature

Click on Signature in the Message ribbon.

Click Signatures – this takes you to the Signatures and Stationery section.

### 4.1.1 TYPE A NAME FOR THE SIGNATURE

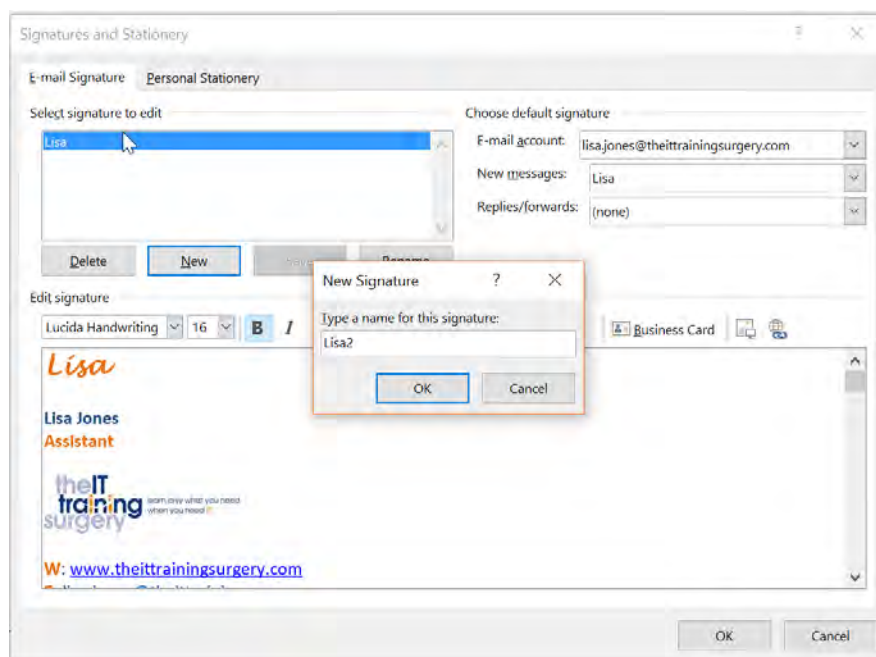
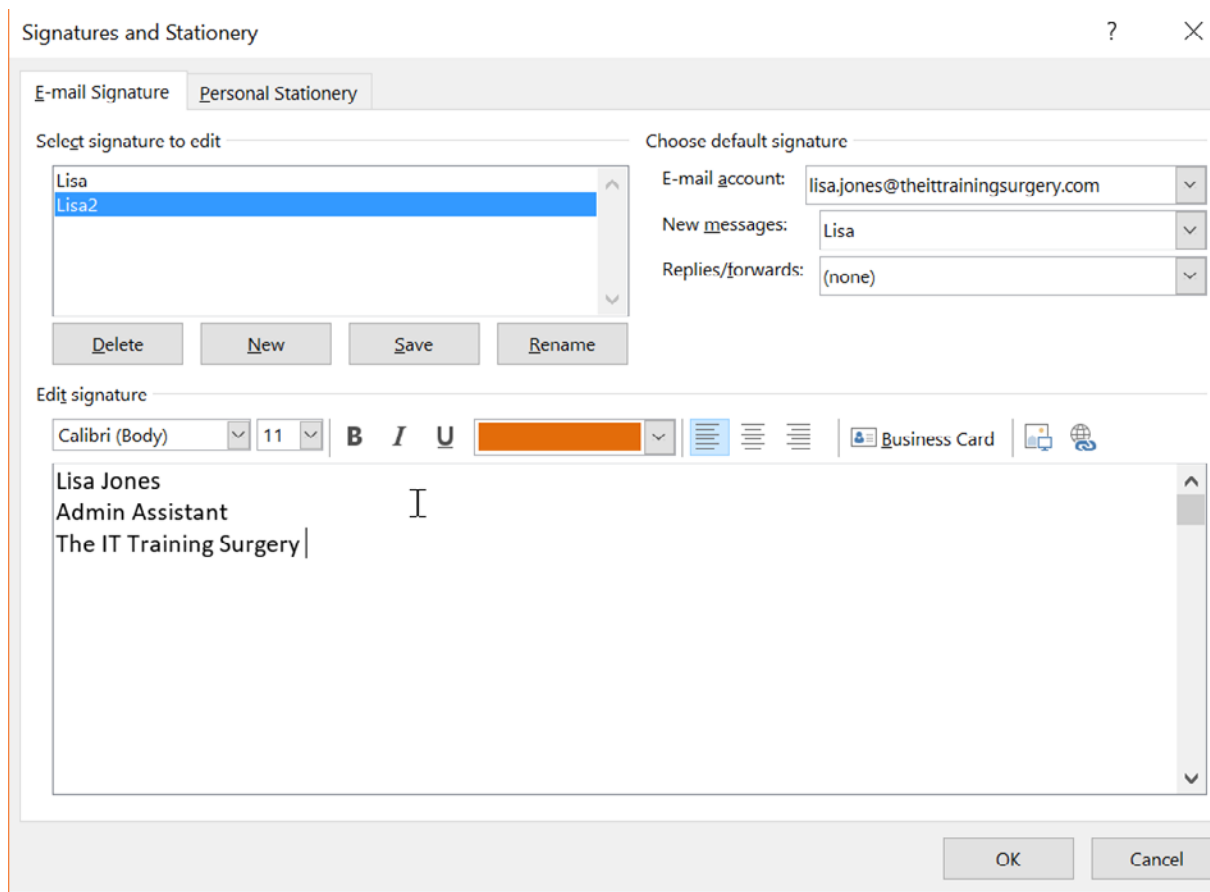


Figure 57 – Name the signature

Click New.

Type a name for the signature so that you can identify it later.

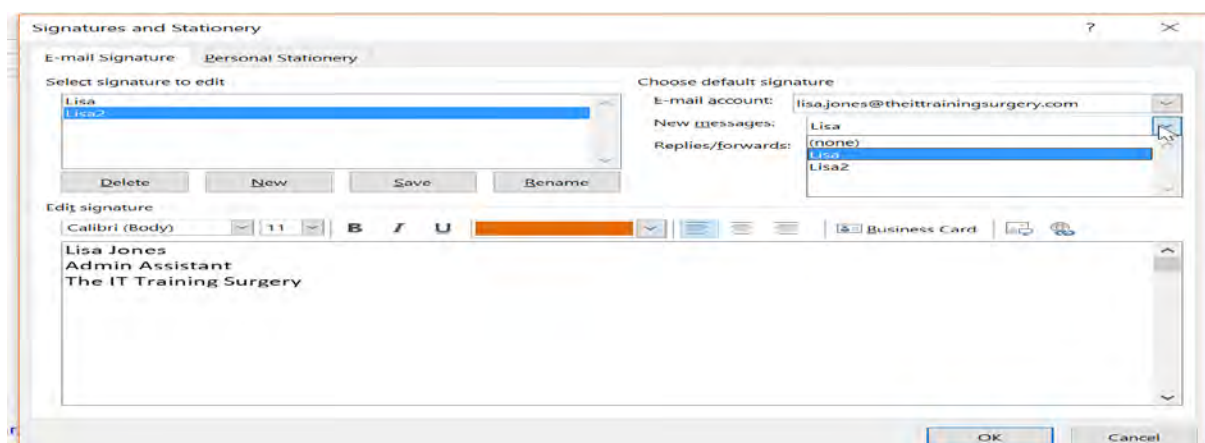
### 4.1.2 TYPE THE SIGNATURE



**Figure 58** – Type the signature or copy and paste the text from another location

1. In the white space, type the text for the signature.
2. Use the formatting options to format the signature.
3. You can add a hyperlink or pictures as well.

### 4.1.3 CHOOSE A DEFAULT SIGNATURE

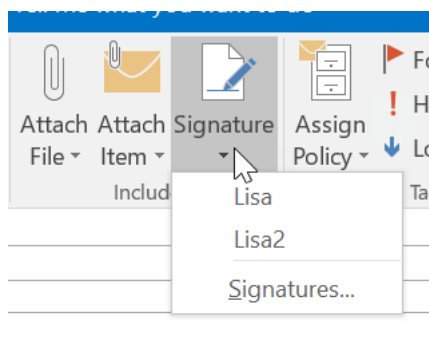


**Figure 59** – Set a default signature to be used all the time

If you want to have a signature appear automatically on every new email select the signature from the New messages option.

To have a signature appear automatically on every reply or forward, select the signature from the Replies/forward option

### 4.1.4 INSERT A SIGNATURE FROM THE RIBBON



**Figure 60** – Insert the signature

Click on the drop down under Signature.

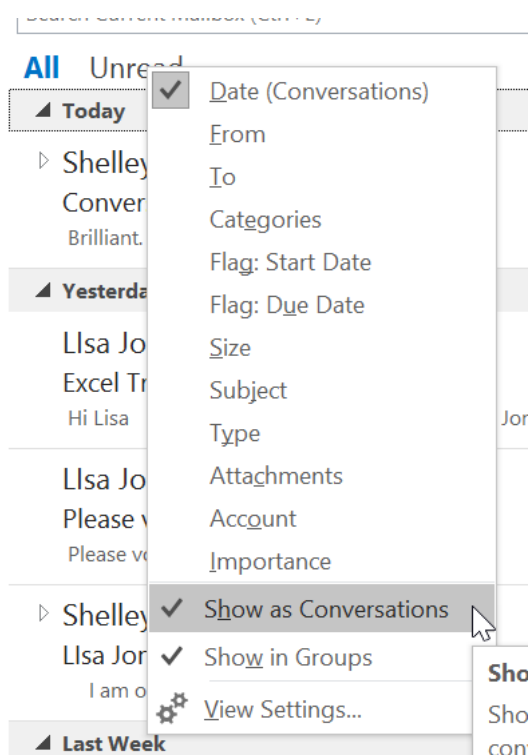
Select the signature to add.

# 5 CONVERSATIONS

## 5.1 CONVERSATION VIEW

Conversation View allows you to group incoming and outgoing email. It puts all emails that are part of a conversation together and collapses them all under the latest one. Expand the top level email to see all the relevant emails that are part of the conversation.

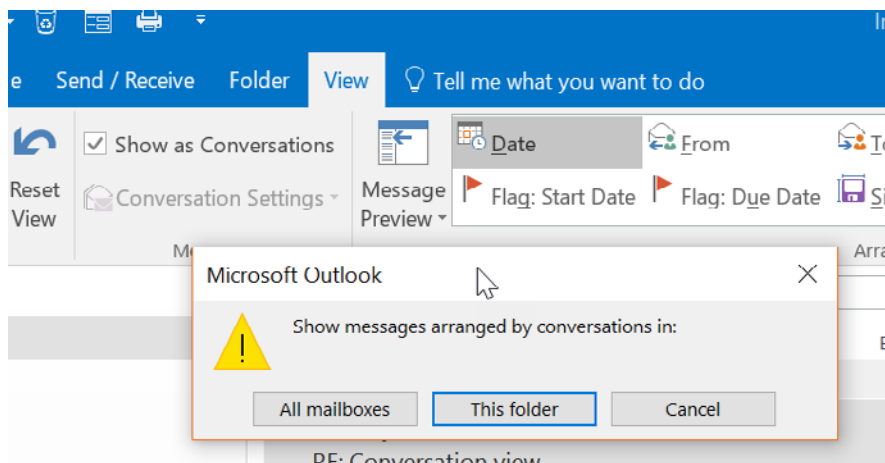
Conversation view can be switched on from the View ribbon or by right clicking at the top of the inbox and selecting Show as Conversations.



**Figure 61** – Show as conversations on a right click

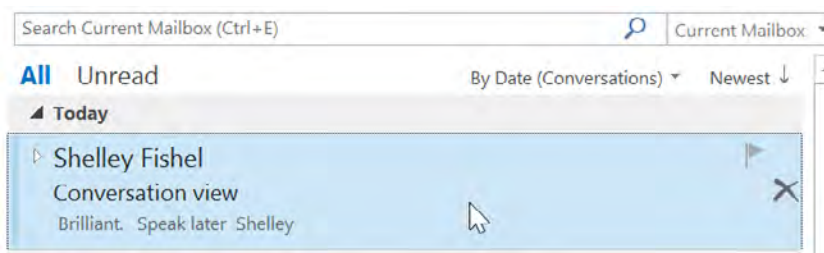
### 5.1.1 DISPLAY EMAIL IN CONVERSATIONS VIA THE VIEW RIBBON

1. Click on the View Ribbon
2. Tick the box Show as Conversations



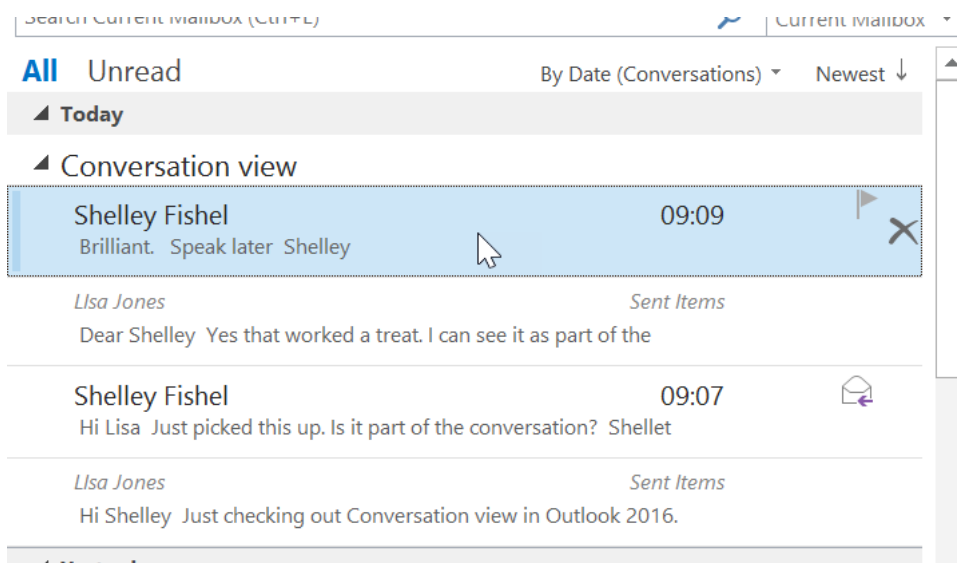
**Figure 62** – Decide if applies to this folder or all folders

Decide if this view should apply to the current folder only or to all mailboxes.



**Figure 63** – Emails now show in conversations

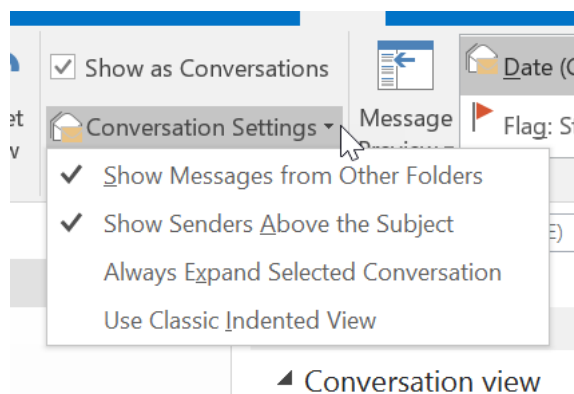
This email from Shelley has a triangle next to her name – this denotes a conversation. To expand the conversation and see all the emails click on the triangle.



**Figure 64** – Conversations can be expanded or collapsed

Note that the Subject of the conversation is Conversation View and it includes all the emails between Lisa and Shelley that relate to this subject line. Once you change the subject line, the email will no longer be part of that conversation. Note that a couple of the emails in the conversation are stored in the Sent Items folder. This helps keep things neat and tidy. The emails are not in the Inbox, they just appear here to make life easier.

### 5.1.2 CONVERSATION SETTINGS



**Figure 65** – Choose the settings for conversations

Conversation settings allow you to determine how the Conversations behave and what is included.

**Show Messages from Other Folders** – display messages that are part of this conversation no matter where they are stored.

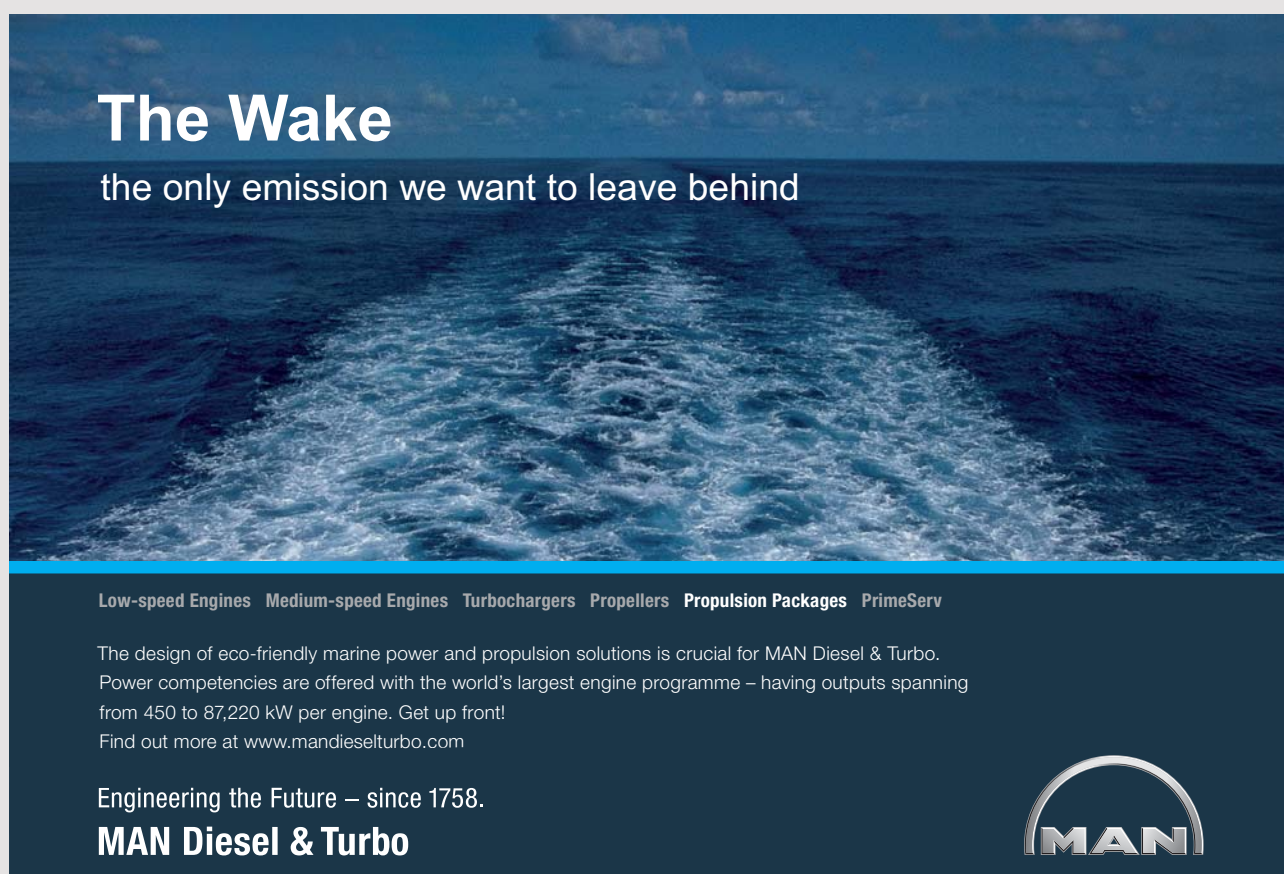
**Show Senders above the Subject** – see the name of the sender rather than the subject of the conversation as the title.

**Always Expand Selected Conversation** – when clicking on a conversation all messages will automatically be displayed.

**Use Classic Indented View** – Emails are indented under the one they are a reply to, instead of all being shown at the same level.

## 5.2 CONVERSATION CLEANUP

Conversation Cleanup deletes all the messages that you no longer need – these are the messages whose text is contained within later messages. Typically when you reply to an email, the original text is kept in the email underneath your reply. In this case there is no need to keep the original clogging up your inbox.



# The Wake


the only emission we want to leave behind

Low-speed Engines Medium-speed Engines Turbochargers Propellers Propulsion Packages PrimeServ

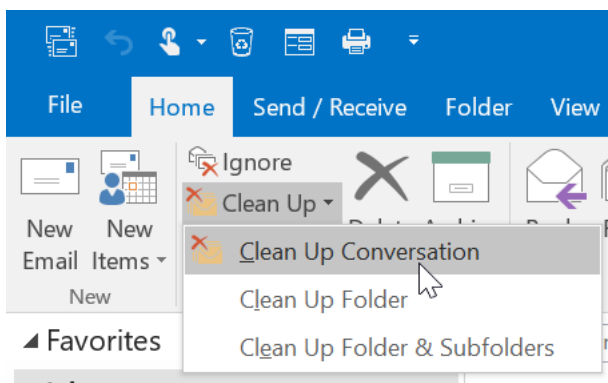
The design of eco-friendly marine power and propulsion solutions is crucial for MAN Diesel & Turbo. Power competencies are offered with the world's largest engine programme – having outputs spanning from 450 to 87,220 kW per engine. Get up front! Find out more at [www.mandieselturbo.com](http://www.mandieselturbo.com)

Engineering the Future – since 1758.

**MAN Diesel & Turbo**



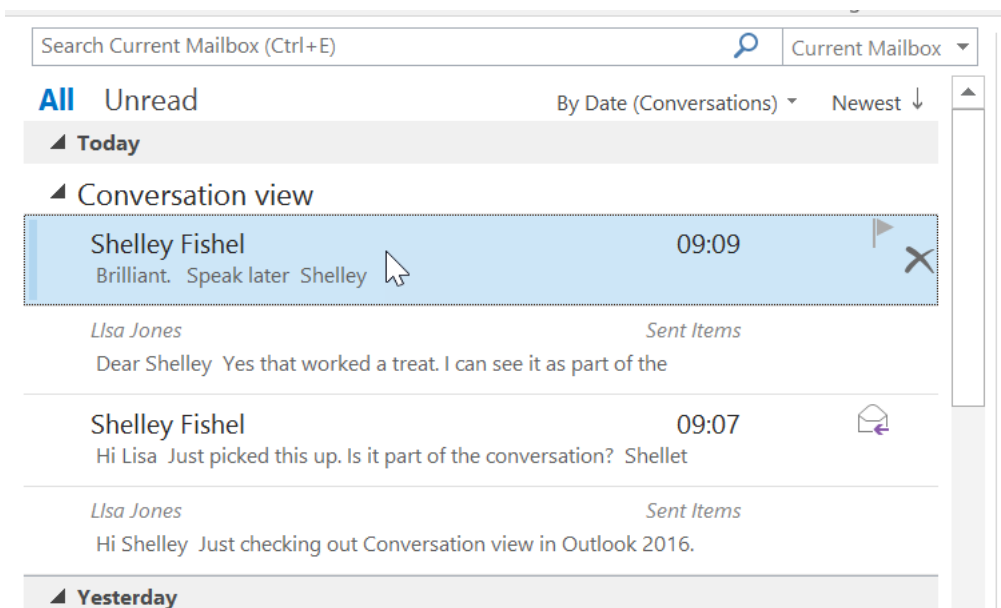
### 5.2.1 CLEAN UP A CONVERSATION



**Figure 66** – Remove redundant messages from a conversation

1. On the Home Ribbon click the drop down arrow under Clean Up
2. Select Clean up Conversation

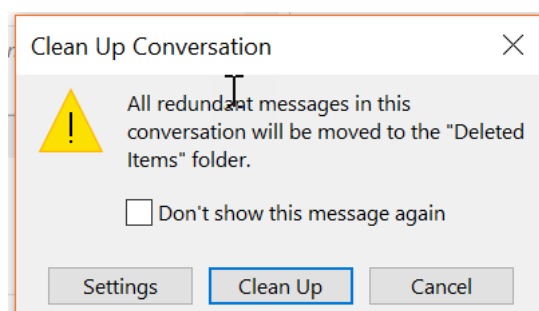
In the conversation we are cleaning up here there are 4 messages, the first email and all the responses within the conversations.



**Figure 67** – Messages in the conversation

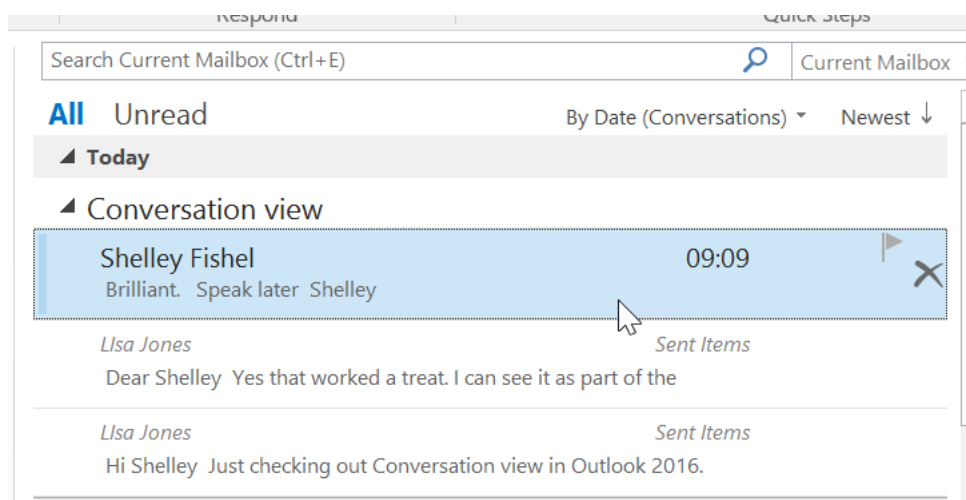
When Lisa cleans up the conversation, the original email from Lisa will be removed as the text is included in the others.

## 5.2.2 CLEANED UP CONVERSATION



**Figure 68** – Check you are happy to clean up the conversation  
click clean up if you are happy to go ahead

Here is that conversation again, now it has been cleaned up – only three messages remain as the text of the original is included in each of the others.



**Figure 69** – Cleaned up conversation

## 5.2.3 MESSAGES ARE CLEANED UP ACCORDING TO YOUR SETTINGS

Whjen you click Clean up COntersatioin on the Home Ribbon you can get to the settings by clicking Settings in the dialogue box that pops up. See above.

### 5.2.4 SETTINGS

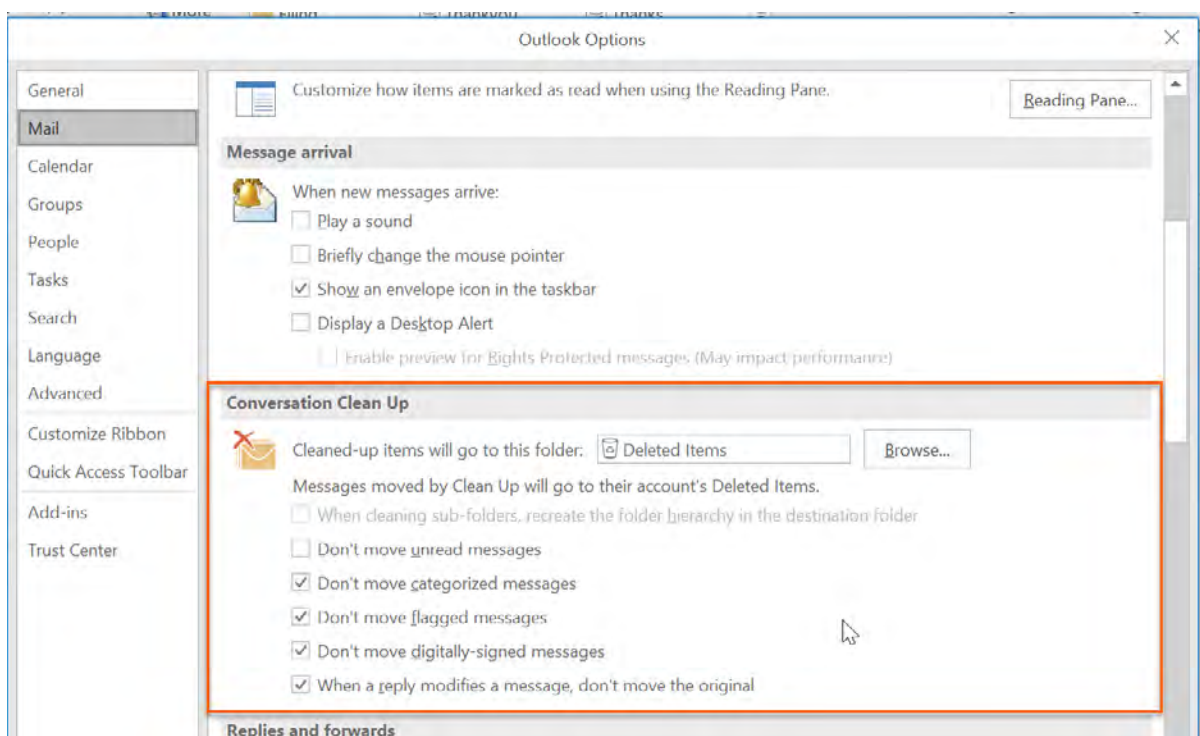


Figure 70 – Check the boxes to set your options

1. Tick or un-tick the boxes
2. Click Browse to set where cleaned up messages go – usually this is the Deleted Items folder

### 5.2.5 CLEAN UP FOLDER

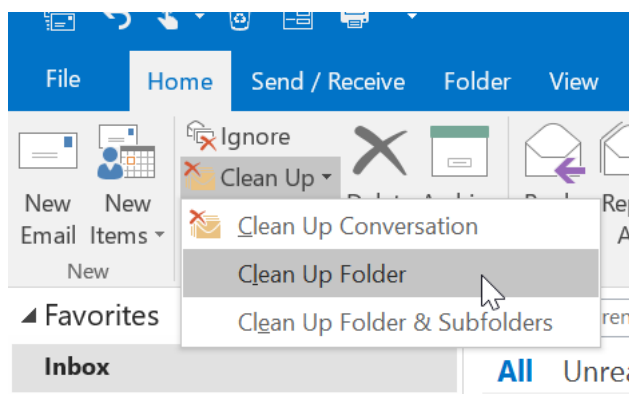
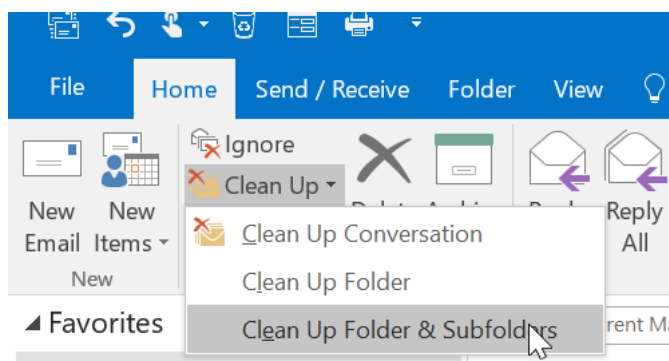


Figure 71 – Clean up a folder

This command reviews all messages in the current folder and removes any that are contained within the body of any other message.

### 5.2.6 CLEAN UP FOLDER & SUB FOLDERS



**Figure 72** – Clean up subfolders too

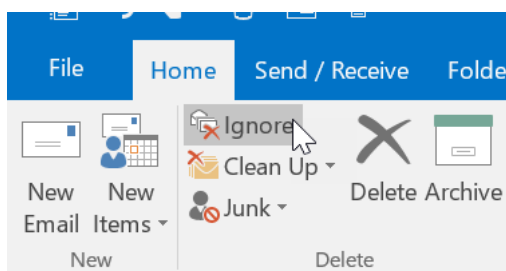
This command looks at all the messages in the current folder and any subfolders that it may have. It will remove any messages that are early parts of conversations and are contained within the body of other messages.

### 5.3 IGNORE A CONVERSATION

You can choose to ignore a conversation. This will move all email in that conversation to the deleted items folder and it will automatically move any future emails directly to the deleted items folder so long as they have the same subject.

Be careful with this one as Outlook identifies the conversation based on the subject line. If you receive email in the future with the same subject line, that will be ignored too!

#### 5.3.1 IGNORE



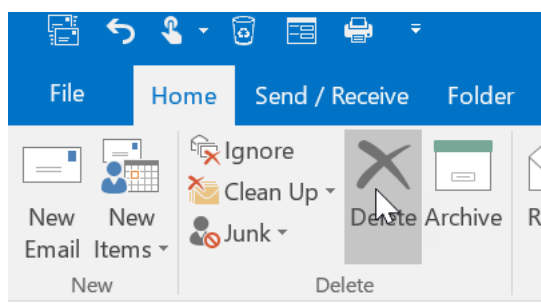
**Figure 73** – Ignore certain conversatins when cleaning up

## 6 DELETING EMAIL

### 6.1 DELETE EMAIL

Keep on top of your inbox – delete all unwanted email.

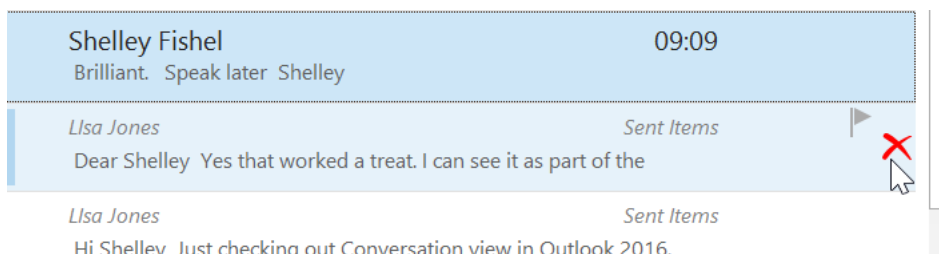
#### 6.1.1 DELETE EMAIL FROM THE RIBBON



**Figure 74** – Delete email

1. Select the email to delete
2. Click Delete on the ribbon,

#### 6.1.2 DELETE AN EMAIL FROM THE EMAIL LIST



**Figure 75** – Use the red cross

Click on the red cross on the right of the message in the list.

#### 6.1.3 PERMANENTLY DELETE

If you are certain that you want to delete an email and you want to bypass the Deleted Items folder, hold down the Shift key when you press Delete on the keyboard or you click on the cross.

This command tells Outlook to remove the email from Outlook altogether and you will not be able to retrieve it. A confirmation message will pop up asking you to confirm that you wish to permanently delete the message(s).

## 6.2 EMPTY DELETED ITEMS

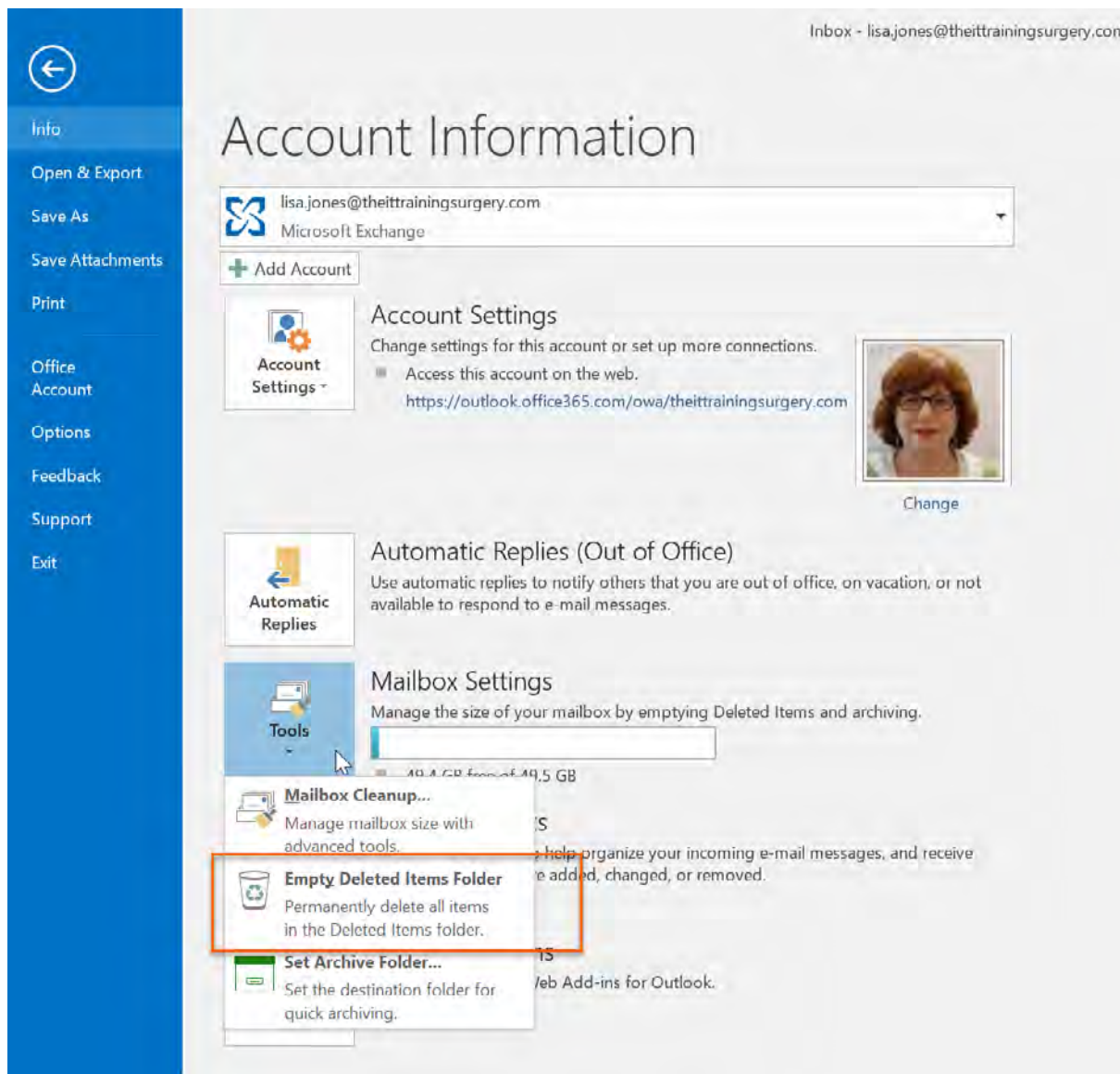
Whilst training Outlook for many years, one of the things I have frequently seen, is people using the Deleted Items folder as a kind of “I might need that one day! folder. This means that it can have thousands of emails and deleted appointments and tasks in it as it is never emptied.

Imagine that you have a waste paper basket in your office. It gets full up eventually, once you empty it into the main rubbish and it gets taken away, that's it! You can't get it back. Now imagine that you NEVER empty the bin in your office – eventually you will be drowning in rubbish. Well your computer or rather your Exchange is getting fuller and fuller with deleted items. They count towards the quota of email in your inbox and get backed up the same way as everything else.

Not only is it inefficient – it could also be costing you or your organisation in financial terms as backups and storage cost money.

The moral? File or archive email if you think you may need it again and Empty the Deleted Items folder frequently!

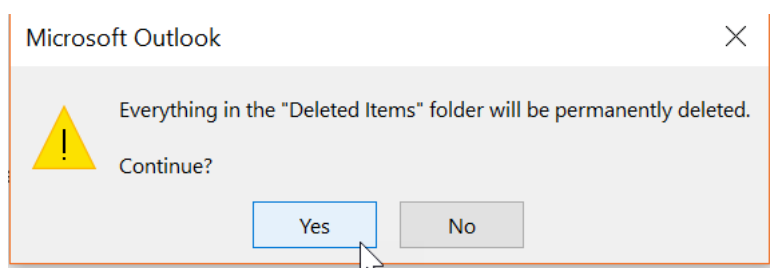
## 2.1 EMPTY DELETED ITEMS



**Figure 76** – Empty deleted items

1. Click File
2. Click the drop down under Tools
3. Click Empty Deleted Items Folder

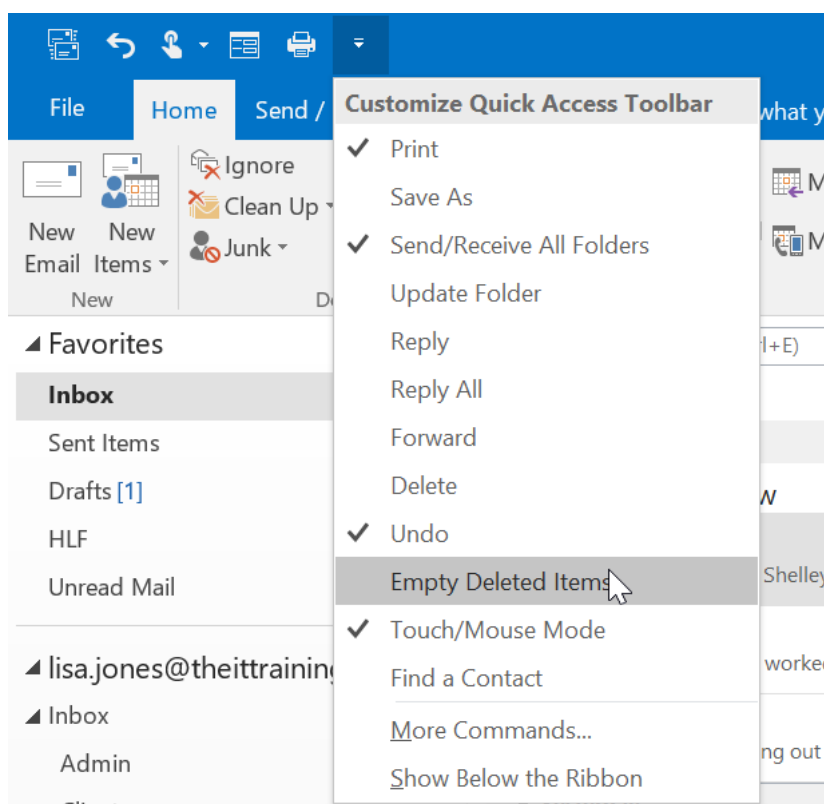
### 6.2.2 CONFIRM



**Figure 77** – Confirm that you want to empty the deleted items folder

4. Click Yes

### 6.2.3 ADD EMPTY DELETED ITEMS TO THE QUICK ACCESS TOOLBAR

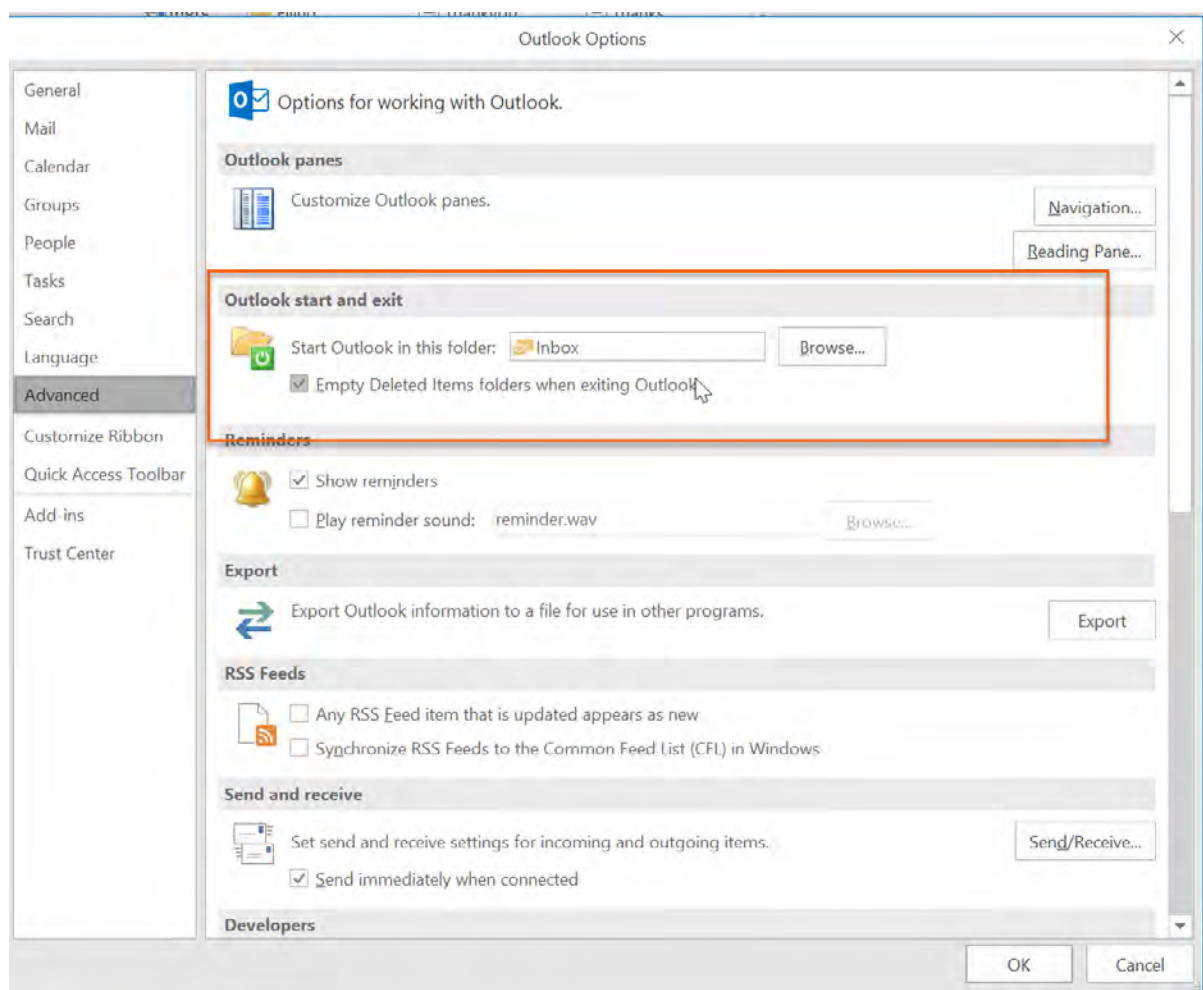


**Figure 78** – Add to the quick access toolbar for ease of use

Add the Empty Deleted Items Icon to the Quick Access Toolbar.

Click on the icon to Empty the Deleted Items Folder.

## 6.2.4 SET OUTLOOK TO EMPTY DELETED ITEMS WHEN EXITING OUTLOOK



**Figure 79** – Set Outlook to empty deleted items on exit

1. Click File
2. Click Options
3. Click Advanced
4. Tick the box – Empty Deleted Items when exiting Outlook – with this option ticked, Outlook will take care of emptying the Deleted Items folder each time you exit the program.

## 7 ARCHIVING

There are two kinds of Archiving in Outlook 2016. There is the Archive Button on the Home Ribbon and there is an Online Archive.

### 7.1 ONLINE ARCHIVE

If you are using an Exchange or Office 365 then your IT team may have enabled the Online Archive and applied an Archive Policy.

When emails go into the Online Archive they are taken out of your local copy of Outlook and no longer count towards the total storage limit. An Archive Policy can be set to make sure that email is archived on a regular schedule so that it is removed from the Inbox and moved to online Storage.

Email that is stored in the Online Archive can be accessed online and in your local copy of Outlook 2016.

The advertisement features a circular logo on the left with three stylized human figures in the center, surrounded by gears and four arrows pointing clockwise. To the right, the text 'UNLEASHING CHANGE MANAGEMENT' is written in large, bold, blue capital letters. Below this, the dates 'OCTOBER 18 & 19, 2018' and the location 'DE RODE HOED AMSTERDAM' are listed in blue. At the bottom, there is a silhouette of an Amsterdam cityscape including a windmill, a bridge, and several buildings. In the bottom left corner, the text 'Global Executive Events' is displayed. A hand cursor icon is positioned over a green oval at the bottom right of the advertisement.

## 7.2 ARCHIVE POLICY

An Archive Policy, is used to automate the archiving process. Your company policy may be to delete all email that is over 6 months old for example. In this case as soon as an email reaches its 6 month birthday it would be deleted. By setting a 5-month retention policy, email will be moved to the Online Archive when it reaches its 5-month birthday automatically.

## 7.3 ARCHIVE FOLDER

A folder can be set to be the Archive folder which is separate to the Online Archive. The Archive Folder should be used to contain any email that you may want at a later date so that the Deleted Items folder is for items that you no longer need and can be deleted on a regular basis.

## 7.4 VIEW THE ONLINE ARCHIVE

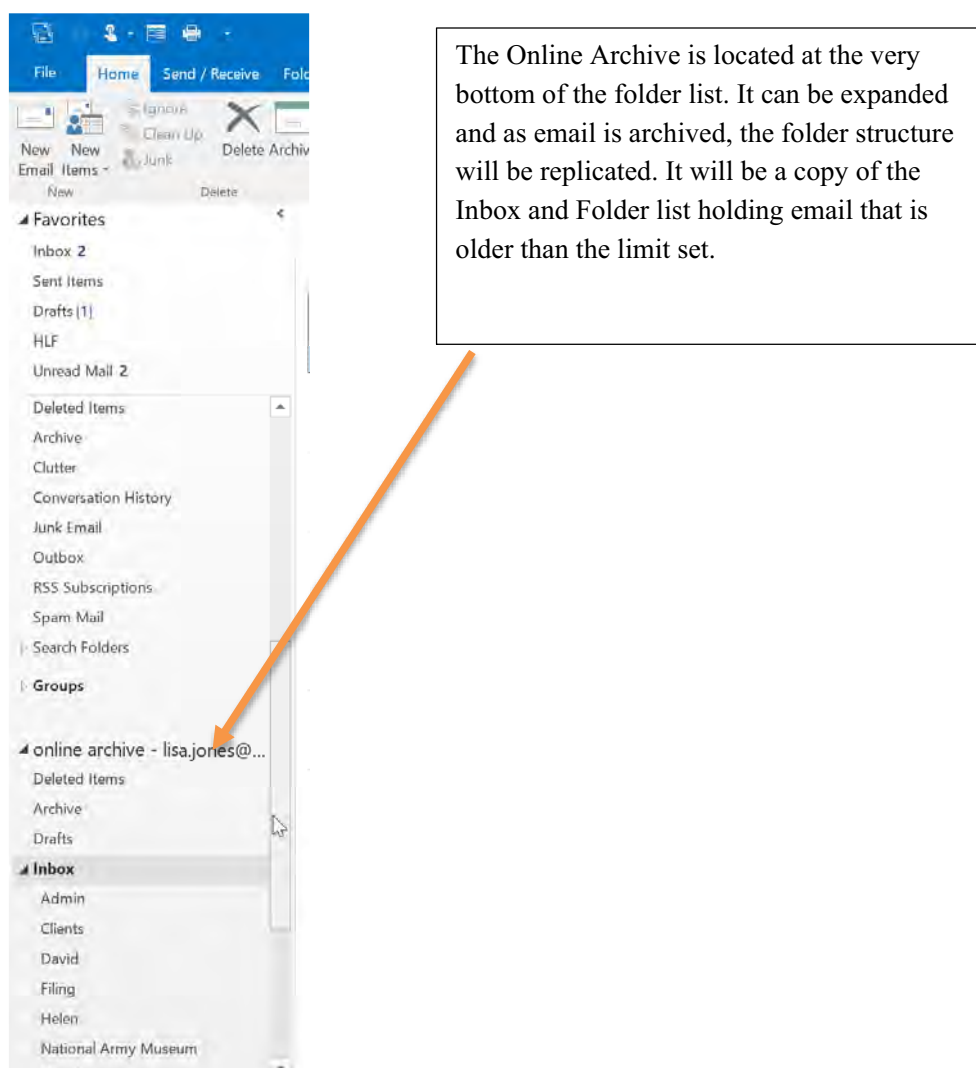


Figure 80

## 7.5 SET ARCHIVE POLICY

An Archive Policy can be set on a folder by folder basis or it can apply to the whole inbox.

Click on the folder you wish the policy to apply to and then click on Set Folder Policy. If you want the policy to apply throughout Outlook, then you must apply it by clicking on the name of the email account.

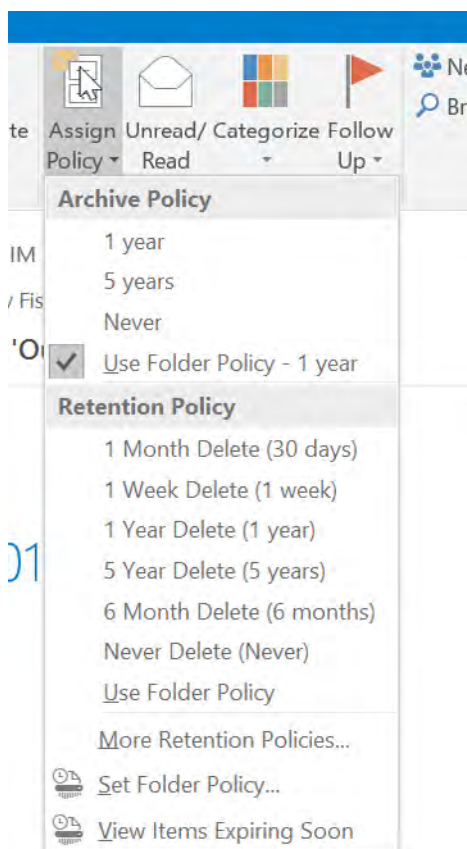
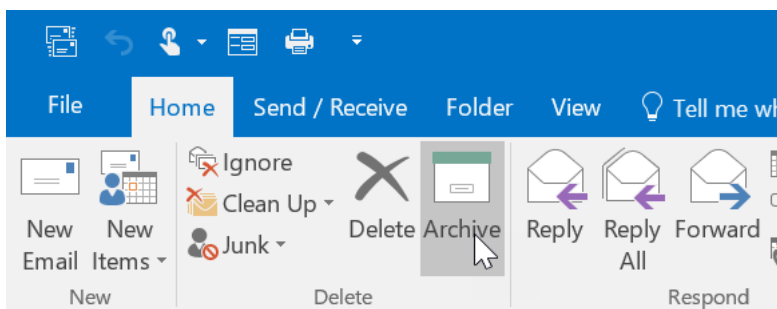


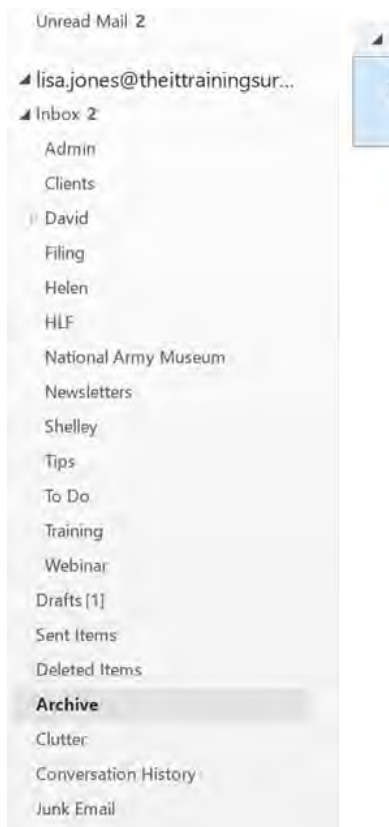
Figure 81

## 7.6 THE ARCHIVE BUTTON



**Figure 82**

This button will move email to a designated folder. If you don't choose the Archive folder, then Outlook will create a folder called Archive the first time you use this. Emails in the Archive folder will still count towards your storage limit.



**Figure 83**

You can choose the folder that will become the archive if you want to use a different folder than the one called Archive.

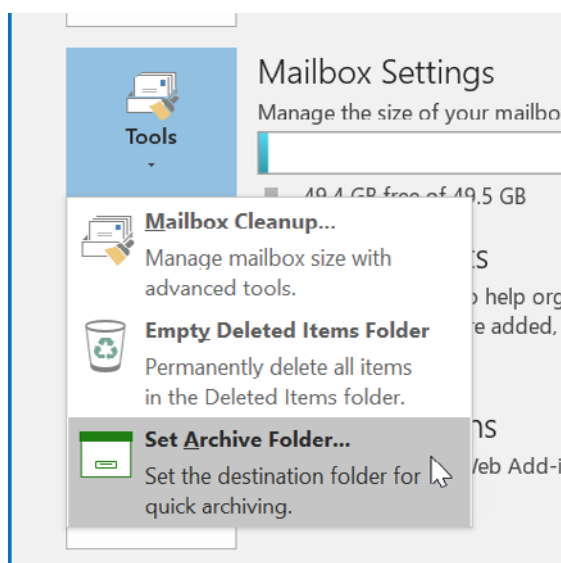


Figure 84

Click on the File Menu – Tools – Set Archive Folder.

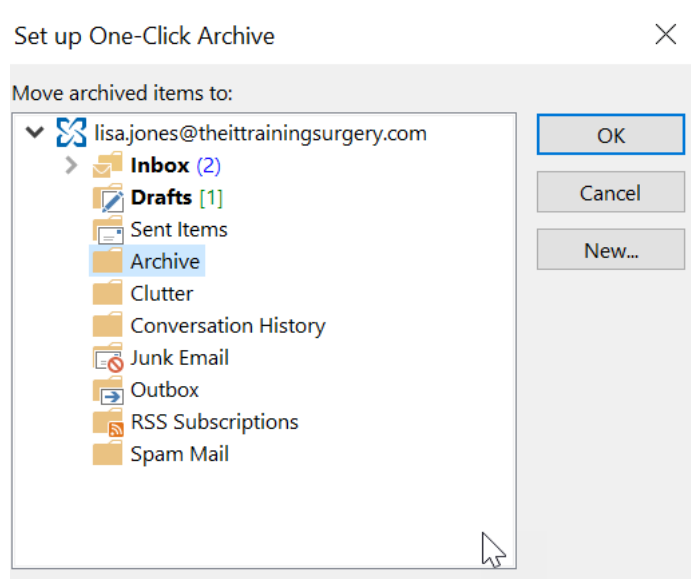


Figure 85

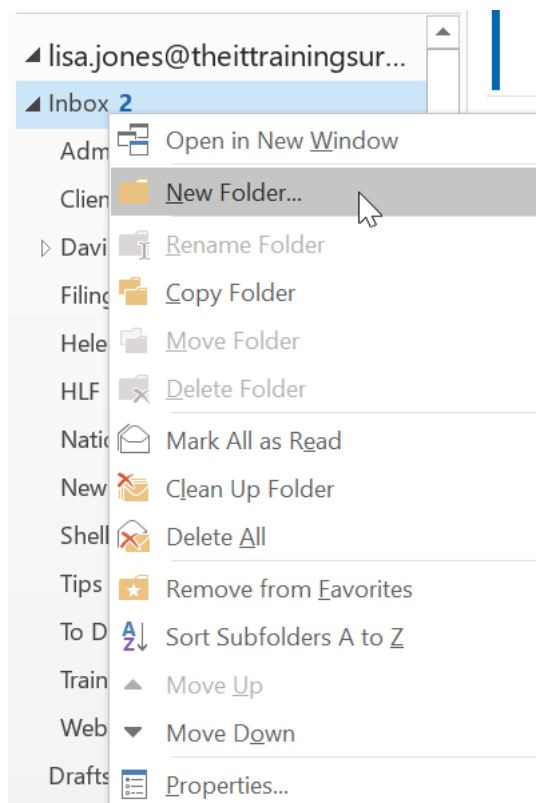
Choose the folder to hold the Archive or click New to create a new folder. Now whenever you click the Archive Button, the email you have selected will be moved to this folder.

# 8 FILING

## 8.1 CREATE A FOLDER

Create folders to file your email.

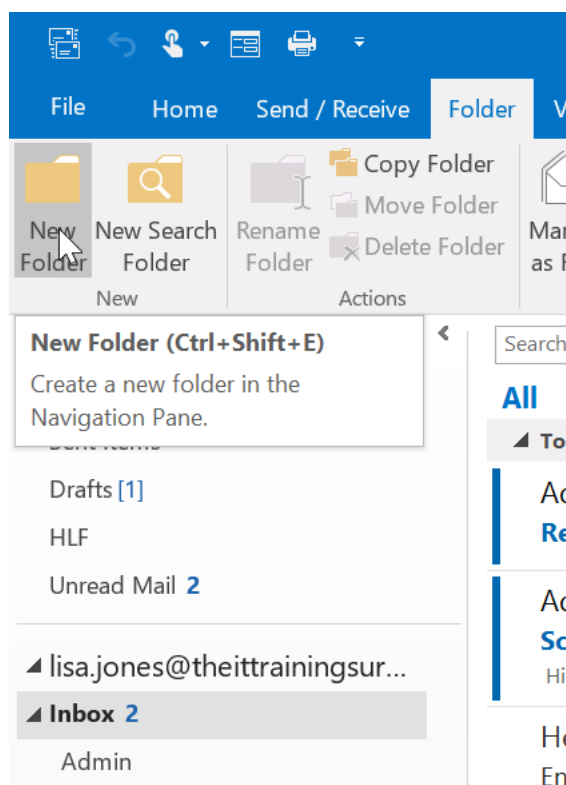
1. Right Click on the parent folder (in this case the Inbox)



**Figure 86** – Create a new folder

2. Left click on New Folder
3. Name the folder.

### 8.1.1 THE FOLDER RIBBON



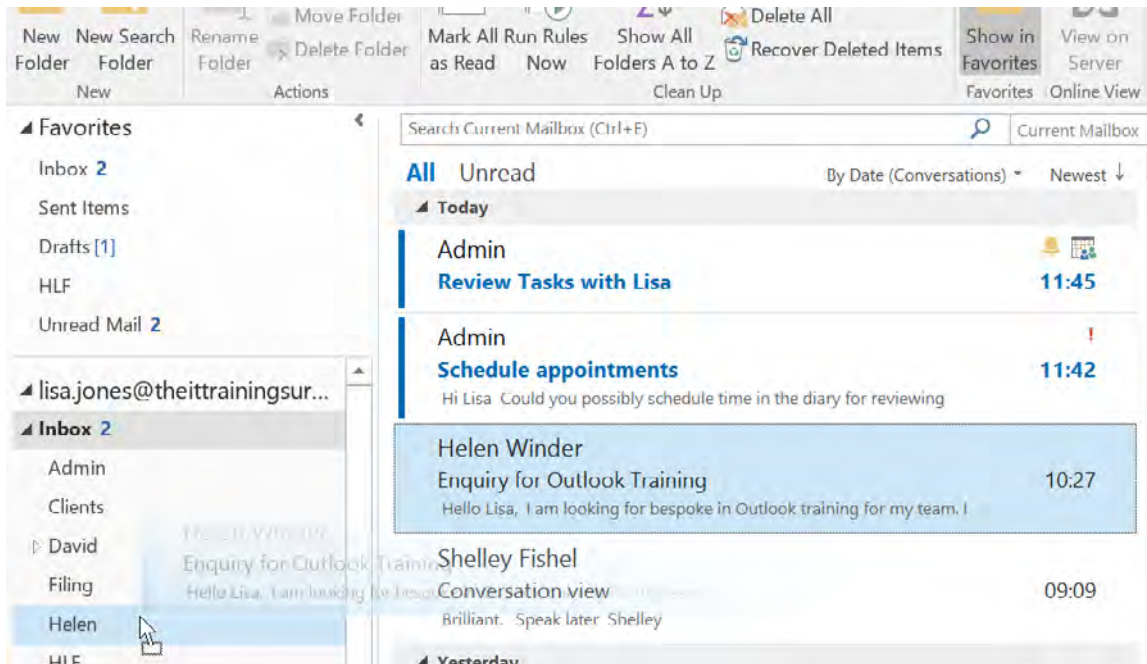
**Figure 87** – The folder ribbon

1. Click on the Folder Ribbon
2. Click New Folder
3. Name the new folder

### 8.2 DRAG AND DROP TO FILE EMAIL

A simple way to move one or more email from your inbox to a folder, is to drag the email(s) and drop them on the folder you want to put them in.

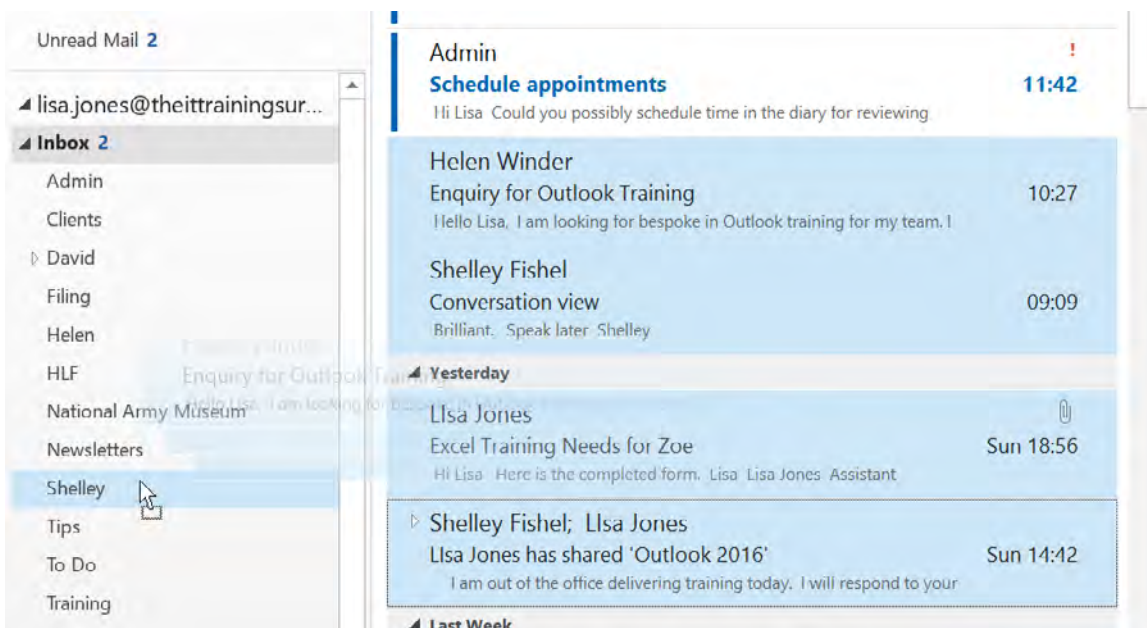
### 8.2.1 DRAG ONE EMAIL



**Figure 88** – Drag to file

1. Click on the email you wish to move
2. Drag keeping the left mouse button down
3. Drop it onto the folder you wish to place it in.

### 8.2.2 DRAG AND DROP SEVERAL EMAILS



**Figure 89** – Drag multiple to file

Select the emails to move:

To select emails that are next to each other in the inbox click on the first one then hold the shift key and click on the last one.

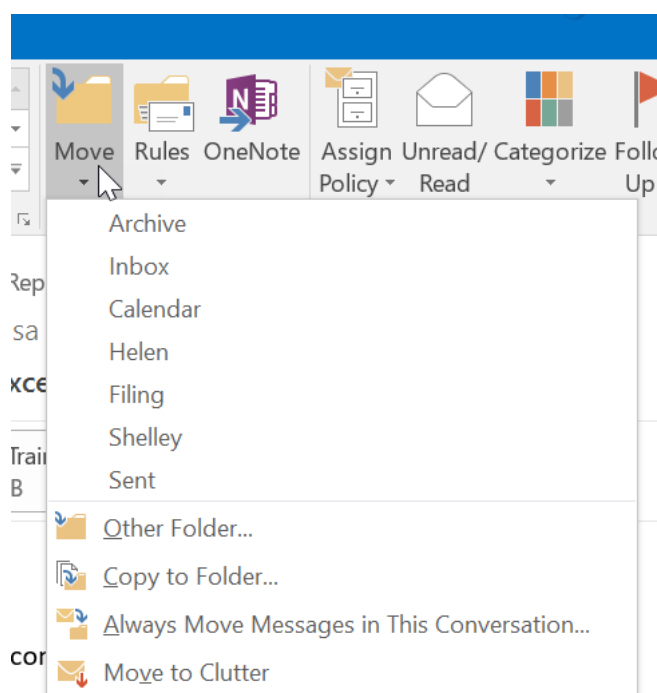
If the emails are not next to each other – hold down the Control Key whilst clicking on each one.

Once you have them all selected, drag them to the folder where you want them to be filed.

### 8.2.3 THE MOVE BUTTON

When filing email dragging and dropping is fairly quick and easy except in the following scenario. You need to move a whole lot of email and you select them all. Then you drag them over to the folder list to drop them into your chosen folder. So far so good. Well now, if you are anything like me you probably have loads of folders and when dragging a bunch of email it is so easy to drop them in the wrong place! So the Move button comes to the rescue!

### 8.2.4 THE MOVE BUTTON



**Figure 90** – The move button

### 8.2.5 MOVE EMAIL

1. Select the email(s) you want to move
2. Click the Move Button
3. The Move button will remember the last 10 folders you moved email to
4. Click on the folder to use

### 8.2.6 OTHER FOLDER

1. If the folder you want to move email to is not in the list click the **Other Folder** shortcut on the list
2. Select the folder you want to move to
3. Click OK

### 8.2.7 CREATE A NEW FOLDER TO MOVE TO

1. You can create a new folder on the fly:
2. Click the Move Button
3. Click Other Folder
4. Click New
5. Select the parent folder and give the new folder a name
6. Click OK

[bookboon.com](http://bookboon.com)

# Corporate eLibrary

See our Business Solutions for employee learning

[Click here](#)

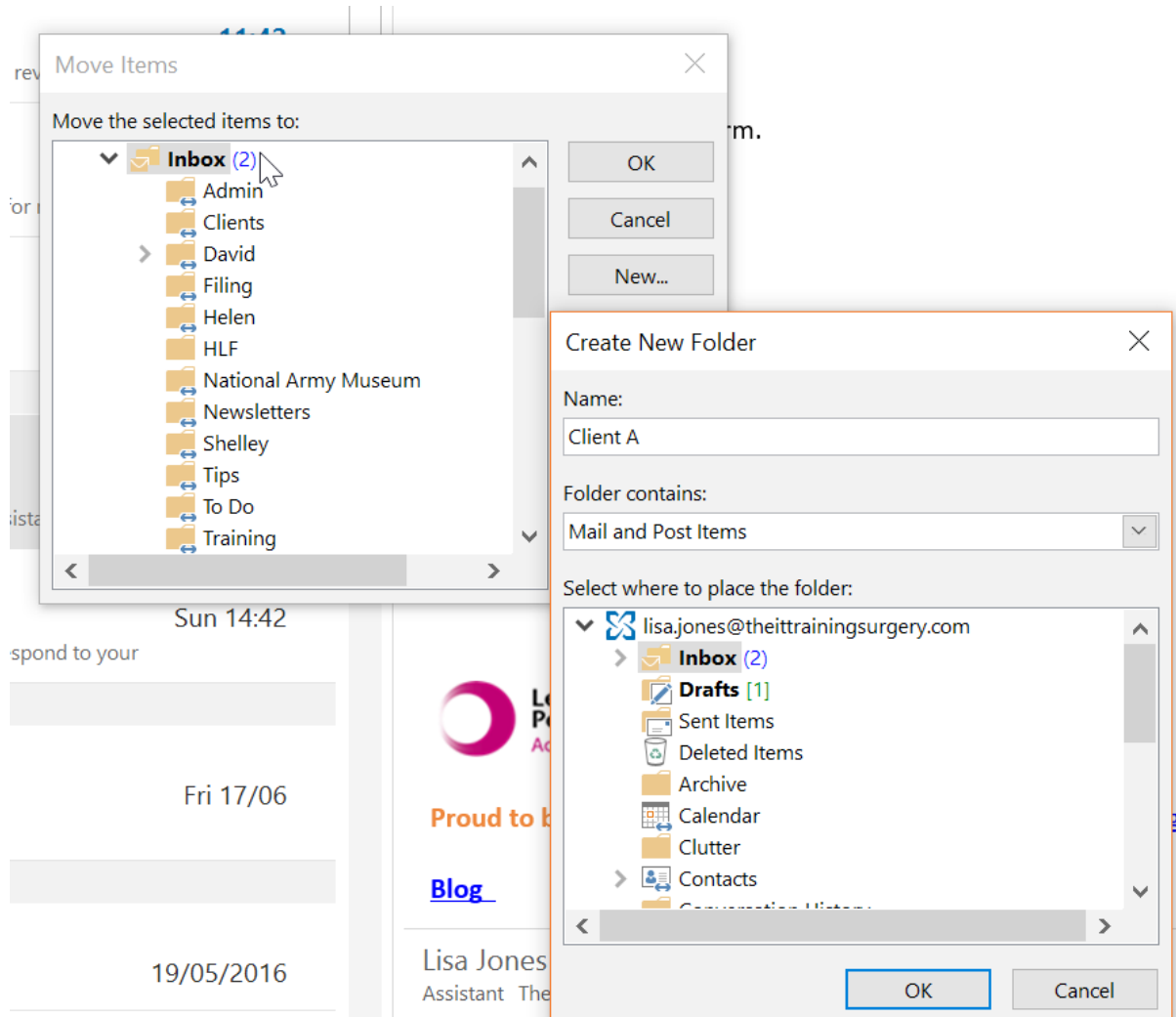
Management    Time Management

Problem solving    Self-Confidence    Effectiveness

Project Management    Goal setting    Motivation    Coaching

Download free eBooks at [bookboon.com](http://bookboon.com)

[Click on the ad to read more](#)



**Figure 91** – Create a new folder on the fly

If this is the first time you are filing email for a particular client or category, you need to create the folder on the fly.

1. Click on Other Folder
2. In the box click New
3. Name the new folder
4. Click OK
5. Click OK again
6. The email will be filed

### 8.2.8 ALWAYS MOVE MESSAGES IN THIS CONVERSATION

When messages are arranged as a conversation, meaning that the replies are grouped with the original, you can decide to have all messages in the conversation moved automatically. This will move all the current messages in the conversation and all future ones too.

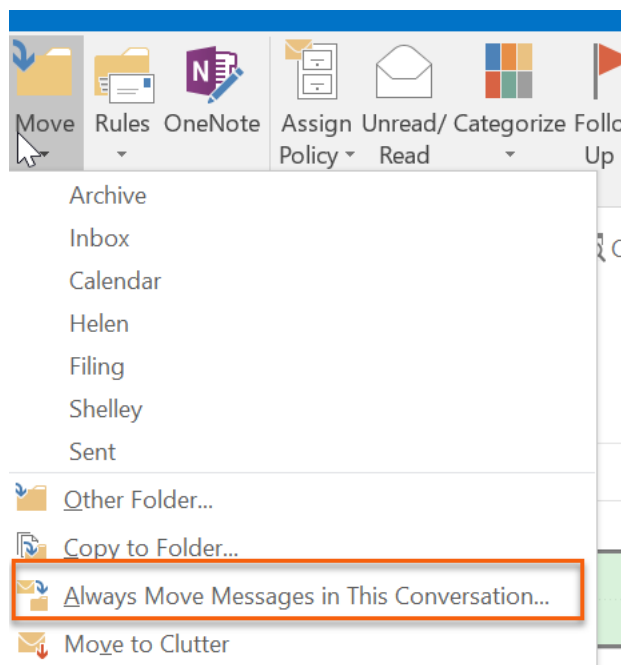


Figure 92

### 8.2.9 MOVE TO CLUTTER

If the message selected is one you wish to receive but is not important to you, it is possible to instruct Outlook 2016 to move this message and all messages in this conversation to Clutter. Clutter is a folder created automatically if the feature has been turned on. Messages arrive and are sent to the Inbox or the Clutter folder based on an algorithm that decides how important the message is. Clutter will learn that a message should not go there, when you drag it back to the Inbox. Keep an eye on your Clutter folder as although Microsoft gets it right most of the time, sometimes you will find an important email lurking there.

# 9 QUICKSTEPS

## 9.1 QUICKSTEPS IN OUTLOOK

QuickSteps allow you to make repetitive tasks really simple and easy, tasks like filing email or sending an email to a group. Most things that you find yourself doing on a regular basis can become a QuickStep.

### 9.1.1 QUICKSTEPS LIVE ON THE RIBBON

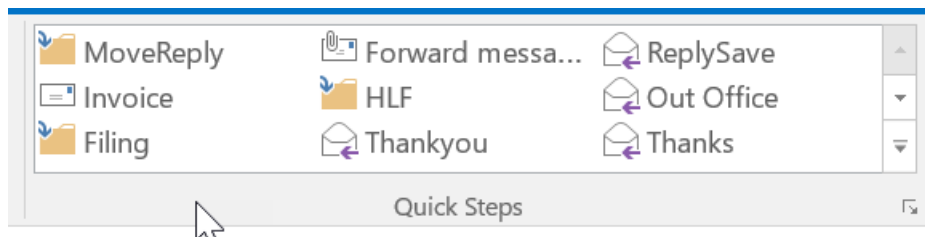


Figure 93 – Quickstep gallery

### 9.1.2 TO CREATE A NEW QUICKSTEP FOR FILING

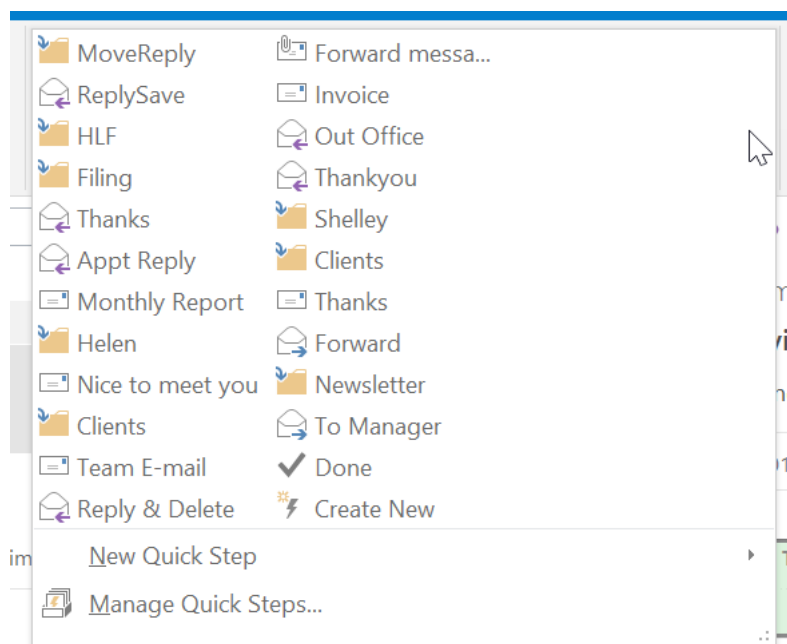
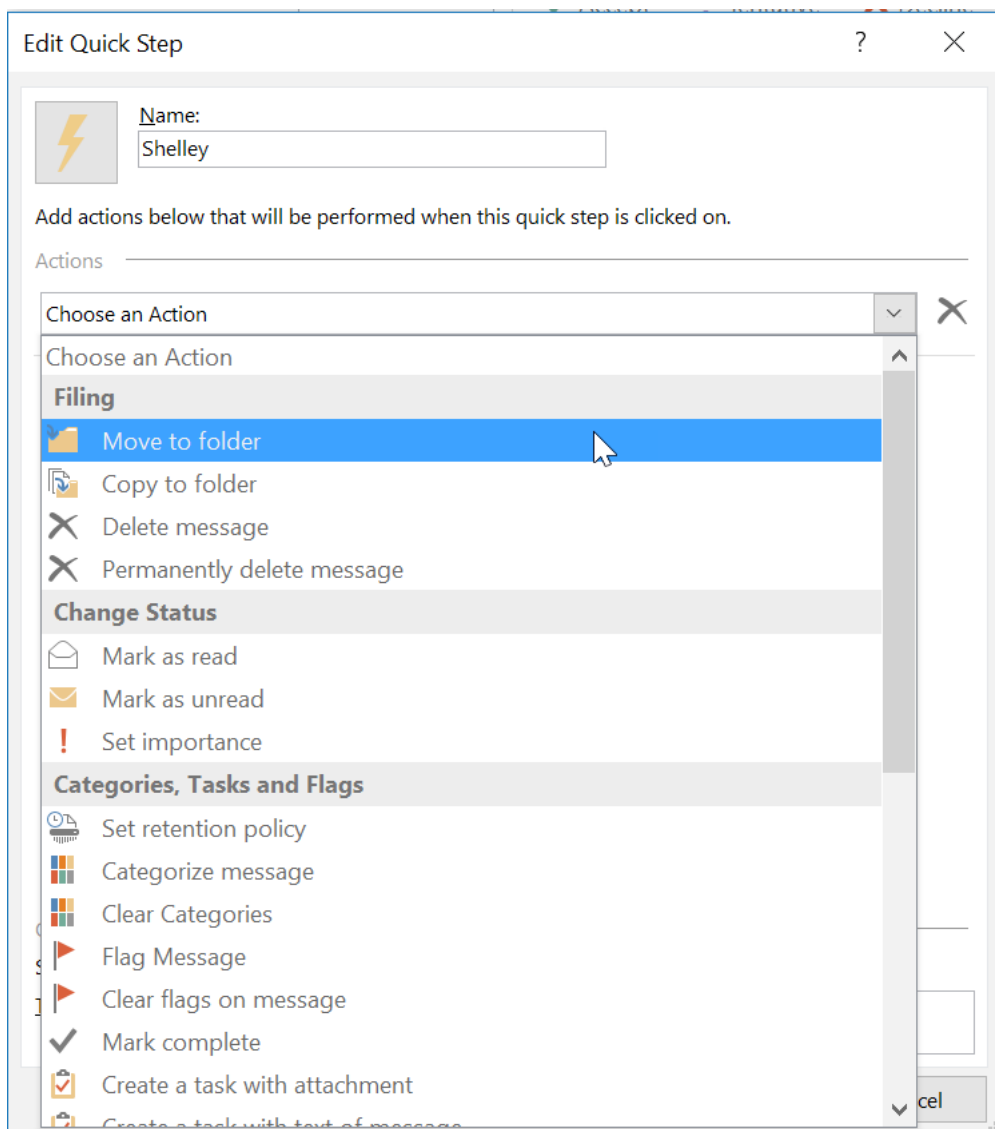


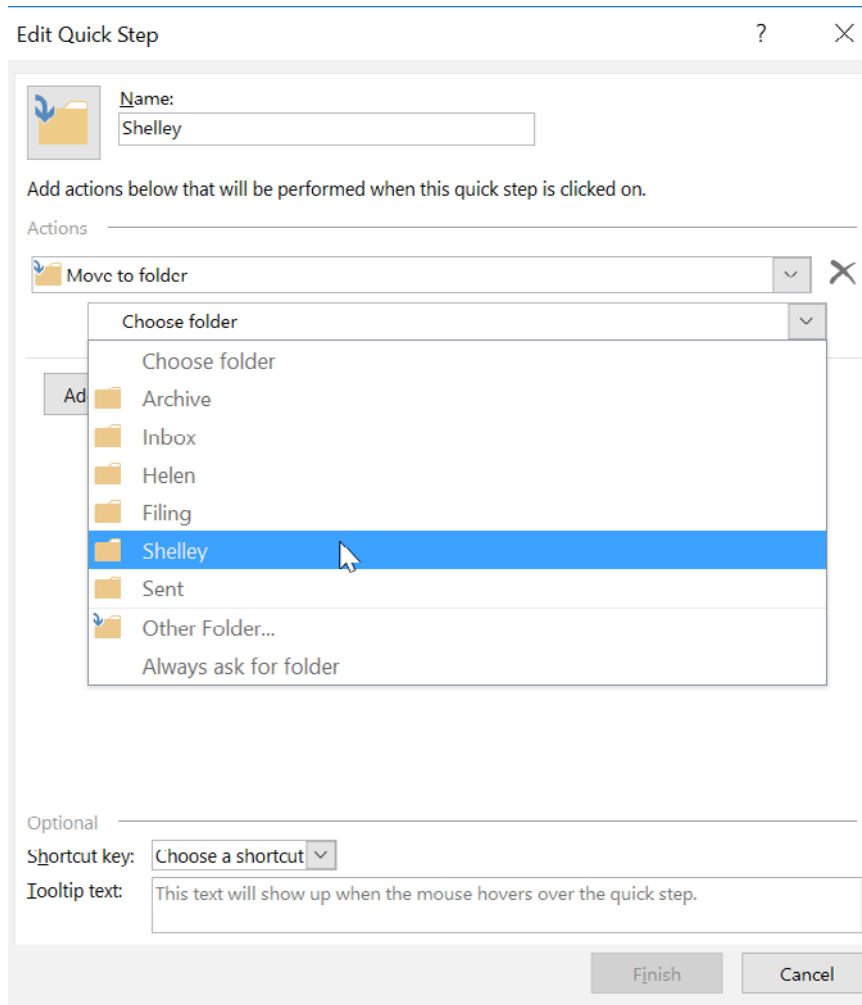
Figure 94 – Create new quickstep

1. Click Create New
2. Name the new QuickStep
3. Select the action to perform
4. Choose one of the actions



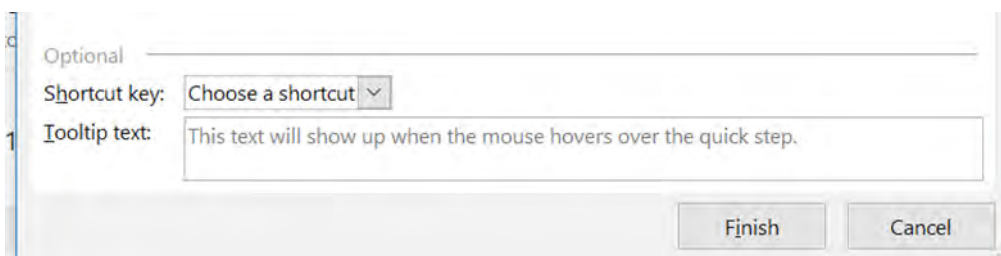
**Figure 95**

5. I chose Move to Folder and selected the folder called Shelley from the list.



**Figure 96**

6. Add any other actions.
7. You can add further actions to the QuickStep select a Keyboard Shortcut and add some text to display when your mouse hovers over the QuickStep – to remind you what it does.
8. Click Finish.



**Figure 97 – Finish**

9. Your new QuickStep is ready to use.

### 9.1.3 TO USE THE QUICKSTEP

1. Simply select the emails you wish to file
2. Click on the QuickStep in the Gallery

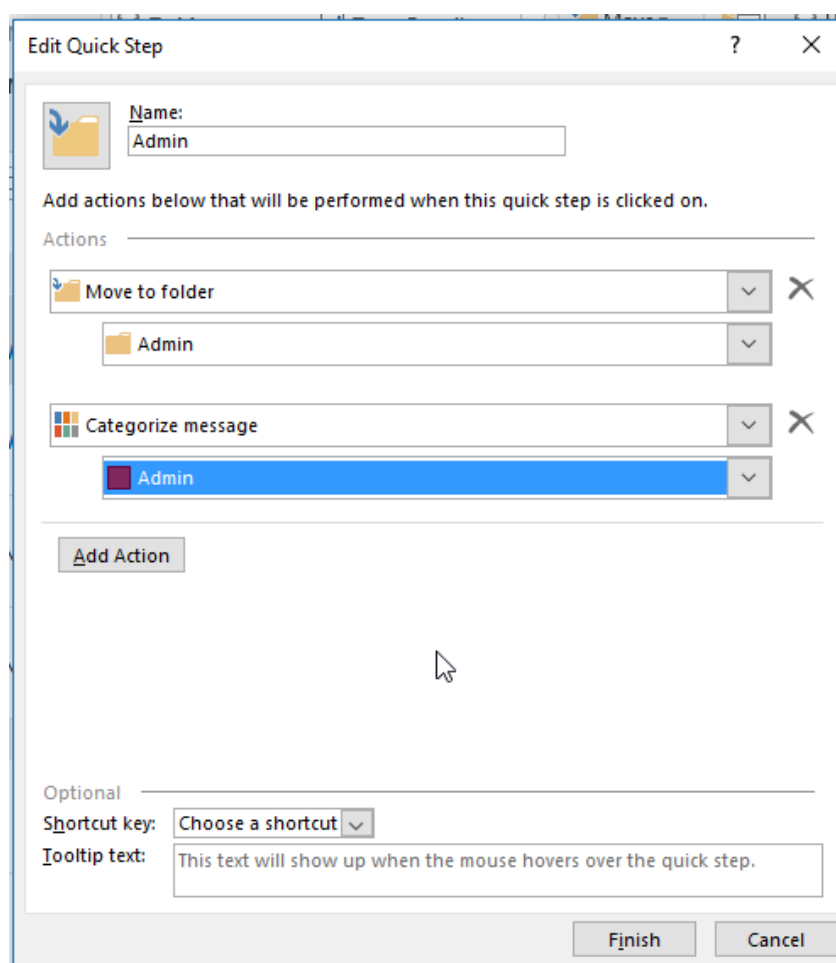
*Hey Presto! They moved!!*

## 9.2 CATEGORISE AND MOVE

In this QuickStep we see how to categorise an email and move it to a folder in one go.

### 9.2.1 CREATE THE QUICKSTEP

1. In the QuickStepsgallery click Create New
2. Type a name for the QuickStep – I have called this Admin
3. Select the action – in this case Move Message
4. Choose the Folder – I chose Admin
5. Click Add Action



**Figure 98** – Add actions

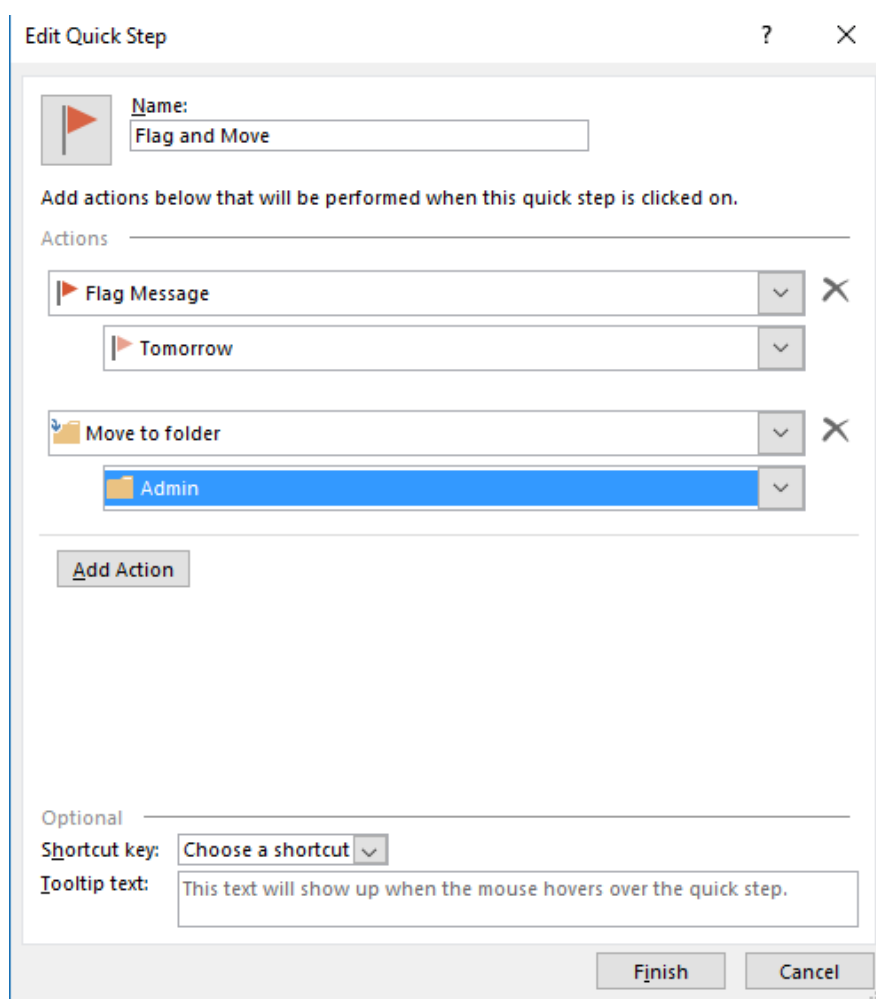
6. Select the action – in this case Categorise Message
7. Choose a Shortcut key if required
8. Click Finish

The message will be categorised as Admin (colour maroon) and moved to the Admin folder.

## 9.3 FLAG AND MOVE

This QuickStep will flag an email for follow up and move it to a specified folder.

### 9.3.1 FLAG AND MOVE TO FOLDER



**Figure 99** – Add the flag action to the quickstep

1. Click Create New in the QuickStepsGallery
2. Type a name for the QuickStep
3. Choose the first action – in this case Flag Message
4. Select the flag to use – I chose tomorrow

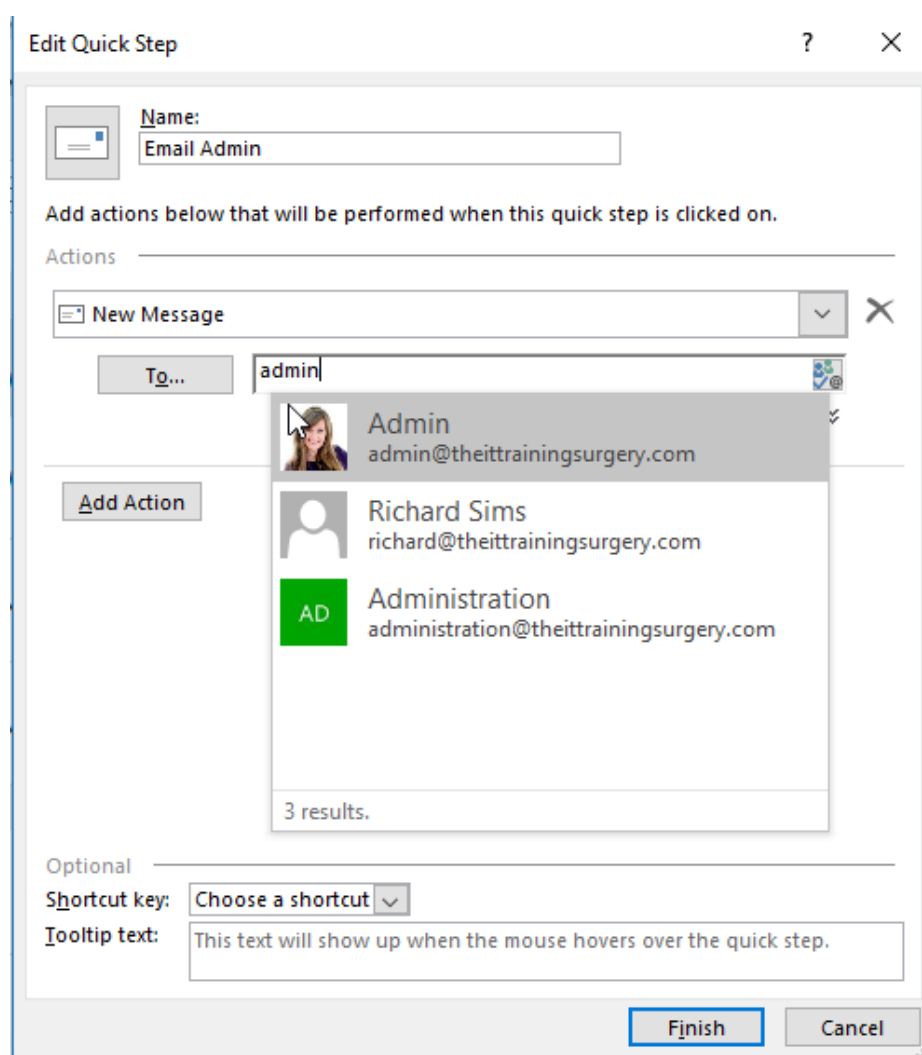
5. Add an action
6. Choose the action – I chose move to folder
7. Select the folder – I chose Admin
8. Click Finish

Now when you use the QuickStep – the message will be flagged for follow up and moved to the specified folder.

## 9.4 NEW EMAIL TO

Is there someone you find yourself addressing an email to all too often? It can become tedious to start a new email and add the address each time. This QuickStep allows you to set up a new email to a particular addressee at the click of a button.

### 9.4.1 NEW EMAIL TO



**Figure 100** – Type the email address to use

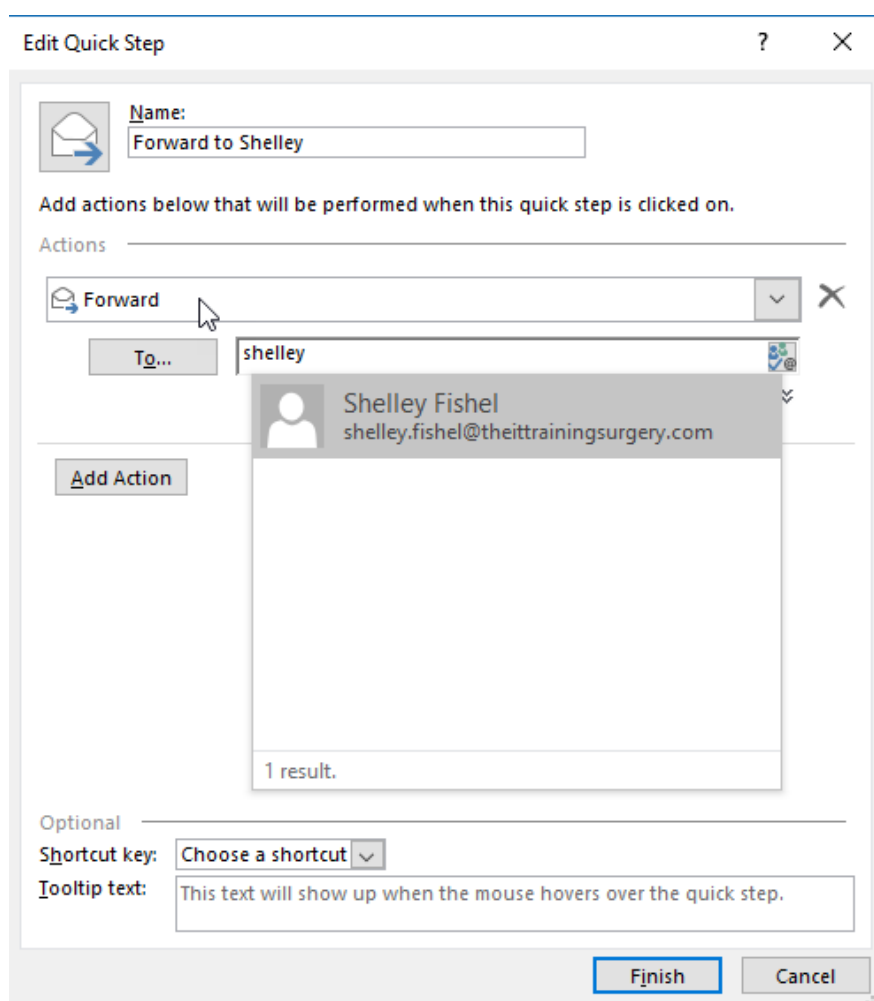
1. Click Create New in the QuickStepsgallery
2. Type a name for the QuickStep
3. Select an action – in this case New Message
4. Type the email address of the person to message (or select from the list offered)
5. Add any further actions you may want
6. Click Finish.

Use this Quickstep to send a ready addressed email. All you have to add is a subject line and content.

## 9.5 FORWARD TO

Do you find yourself forwarding lots of email to someone else? Create a QuickStep that will set up the forwarding of the email you have selected to the person you specify.

### 9.5.1 CREATE NEW QUICKSTEP



**Figure 101** – Choose who to forward to or type the email address

1. Click Create New in the QuickStep gallery
2. Type a name for the QuickStep
3. Select an action – in this case Forward
4. Type the email address of the person to forward to (or select from the list provided)
5. Click Finish.

## 9.6 MEETING WITH

If you find that you are often setting up a meeting with a particular person – a colleague or your line manager, create a QuickStep to get off to a head start.

### 9.6.1 NEW MEETING WITH

Edit Quick Step

Name: Meet Shelley

Add actions below that will be performed when this quick step is clicked on.

Actions

New Meeting

To... shelley.fishel@theittrainingsurgery.com

Show Options

Add Action

Optional

Shortcut key: Choose a shortcut

Tooltip text: This text will show up when the mouse hovers over the quick step.

Finish Cancel

Figure 102 – Choose new meeting to begin


1. Click Create new from the QuickSteps gallery
2. Type a name for the QuickStep
3. Choose an action – in this case New Meeting
4. Type the email address of the person to meet with (or select from those suggested)
5. Click Finish

There are other Meeting QuickSteps to choose from.

**Reply with Meeting** – this will set up a reply to an email with a meeting ready for you to populate.

**Create an appointment with attachment** – this sets up an appointment and puts the email you are sitting on in the body of the appointment as an attachment – handy if you need to keep all the information in the email.

**Create appointment with text of email** – sets up an appointment with the text of the email in the body of the appointment.




**Struggling to get interviews?**

Professional CV consulting & writing assistance from leading job experts in the UK.

Visit site

Take a short-cut to your next job!  
Improve your interview success rate by 70%.

 **TheCVagency**  
Visit [thecvagency.co.uk](http://thecvagency.co.uk) for more info.

## 9.7 STANDARD RESPONSE AND ADD TO CALENDAR

I was asked recently, can we have a Quickstep that sets up a standard response and creates an appointment in my calendar? This means two jobs being done at once. So here is how.

There will be several steps:

- Create a new Quickstep
- Add the first action – a Reply with Standard text
- Add in the Standard Text
- Add another action to create an appointment
- This will create an appointment for you to complete and add to your calendar
- Finish

### 9.7.1 STEP ONE – CREATE A REPLY WITH STANDARD TEXT

The screenshot shows the 'Edit Quick Step' dialog box. At the top, the title is 'Edit Quick Step'. Below the title bar, there is a 'Name' field with the text 'Text and Appt'. Underneath, it says 'Add actions below that will be performed when this quick step is clicked on.' The 'Actions' section contains a 'Reply' action. Below the action, there are fields for 'To...', 'Subject' (with 'Add Cc' and 'Add Bcc' links), 'Flag' (set to 'No Flag'), and 'Importance' (set to 'No Change'). The 'Text' field contains the text 'Thanks for your email. I have added this to my calendar'. There is a checkbox for 'Automatically send after 1 minute delay.' which is unchecked. At the bottom, there is an 'Add Action' button, an 'Optional' section with a 'Shortcut key' dropdown (set to 'Choose a shortcut') and a 'Tooltip text' field (containing 'This text will show up when the mouse hovers over the quick step.'). At the very bottom, there are 'Finish' and 'Cancel' buttons.

Figure 103

1. Create a new Quickstep and name it
2. Select the first action – Reply
3. Click on Show Options
4. Type your standard text response
5. Click Add Action

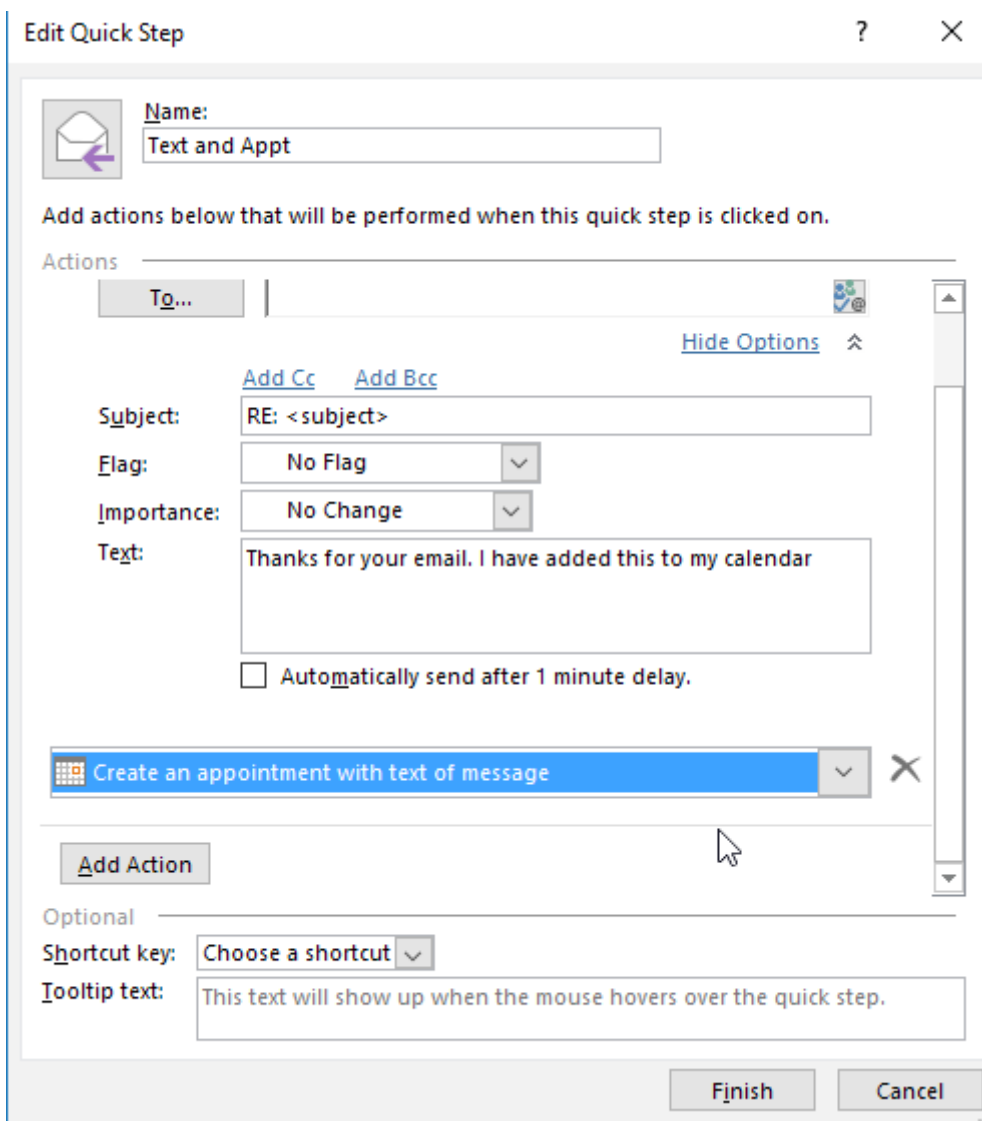


Figure 104

By selecting Create an Appointment with text of message, you are adding an appointment to your own calendar which includes the body of the message. If you need to create a meeting request to send to the person you are replying to, then choose New Meeting.

When using this Quickstep an email is generated with the standard text inserted and an appointment or meeting request is created as well. Two for the price of one!

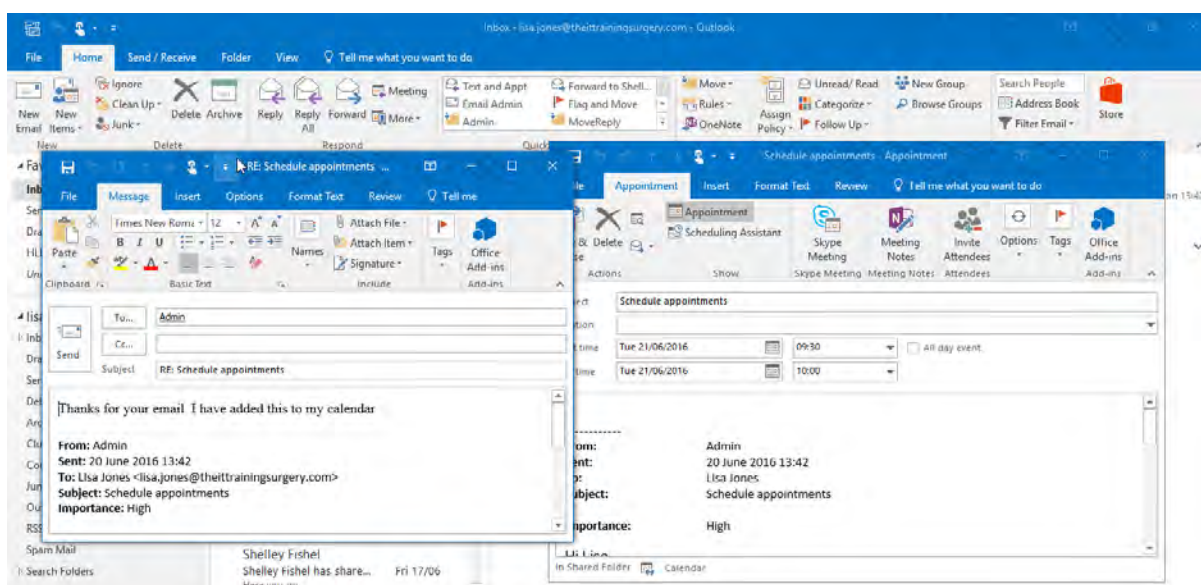


Figure 105 – Two for the price of one!

# 10 CUSTOM QUICKSTEPS

## 10.1 CREATE A STANDARD EMAIL RESPONSE

If you find yourself replying to email with a standard response then this is for you!

### 10.1.1 CREATE A NEW QUICKSTEP

1. In the QuickSteps group click on Create New
2. Name the QuickStep and start to build it
3. Select Reply
4. Click Show Options to add the text

**Edit Quick Step** ? X

**Name:** Response

Add actions below that will be performed when this quick step is clicked on.

**Actions**

Reply

To...

[Add Cc](#) [Add Bcc](#)

**Subject:** RE: <subject>

**Flag:** No Flag

**Importance:** No Change

**Text:** standard text goes here

Automatically send after 1 minute delay.

[Add Action](#)

**Optional**

**Shortcut key:** Choose a shortcut

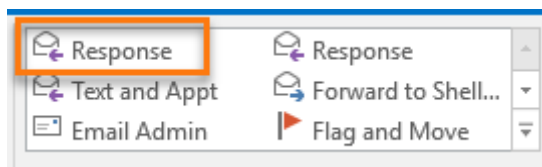
**Tooltip text:** This text will show up when the mouse hovers over the quick step.

**Finish** **Cancel**

**Figure 106** – Show options to add text

5. The subject is populated because this is a reply
6. Type the text
7. Click Finish

### 10.1.2 YOUR NEW QUICKSTEP



**Figure 107** – New quickstep in the gallery

### 10.1.3 TO LAUNCH A NEW EMAIL WITH THE STANDARD TEXT

1. Click on the QuickStep in the QuickStep gallery
2. An email reply is set up
3. Finish off the email with any sign off that you require

If you have your signature set to be added to all your outgoing email, it will be appended automatically.

## 10.2 STANDARD EMAIL

In the previous section we saw how to set up a standard email response. In this section we will see how to set up a standard new email.

### 10.2.1 NEW MESSAGE

1. Click Create New from the QuickSteps gallery
2. Type a name for the QuickStep
3. Add an action – New Message
4. Click Show Options – this is where you will type the message
5. Fill in the message

**Edit Quick Step** ? X

**Name:**  
Nice to meet you

Add actions below that will be performed when this quick step is clicked on.

Actions

New Message X

To...

[Hide Options](#) ^

[Add Cc](#) [Add Bcc](#)

**Subject:** Nice to meet you at the lunch yesterday

**Flag:** No Flag v

**Importance:** No Change v

**Text:**  
Lovely to meet you

Automatically send after 1 minute delay.

**Add Action**

Optional

**Shortcut key:** Choose a shortcut v

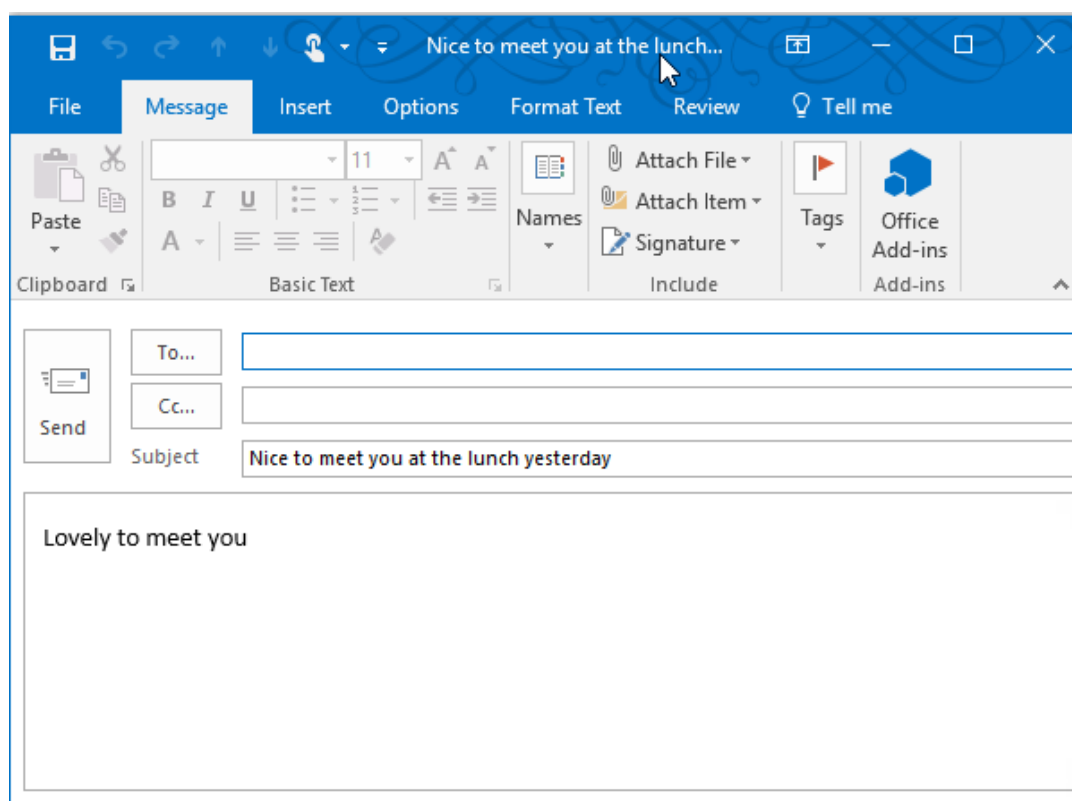
**Tooltip text:**  
This text will show up when the mouse hovers over the quick step.

**Finish** **Cancel**

**Figure 108** – Fill in the details

1. Type a subject line
2. Choose a flag
3. Choose Importance
4. Type the message in the Text box
5. Click Finish

## 10.2.2 LAUNCH THE NEW MESSAGE



**Figure 109** – Use the new quickstep

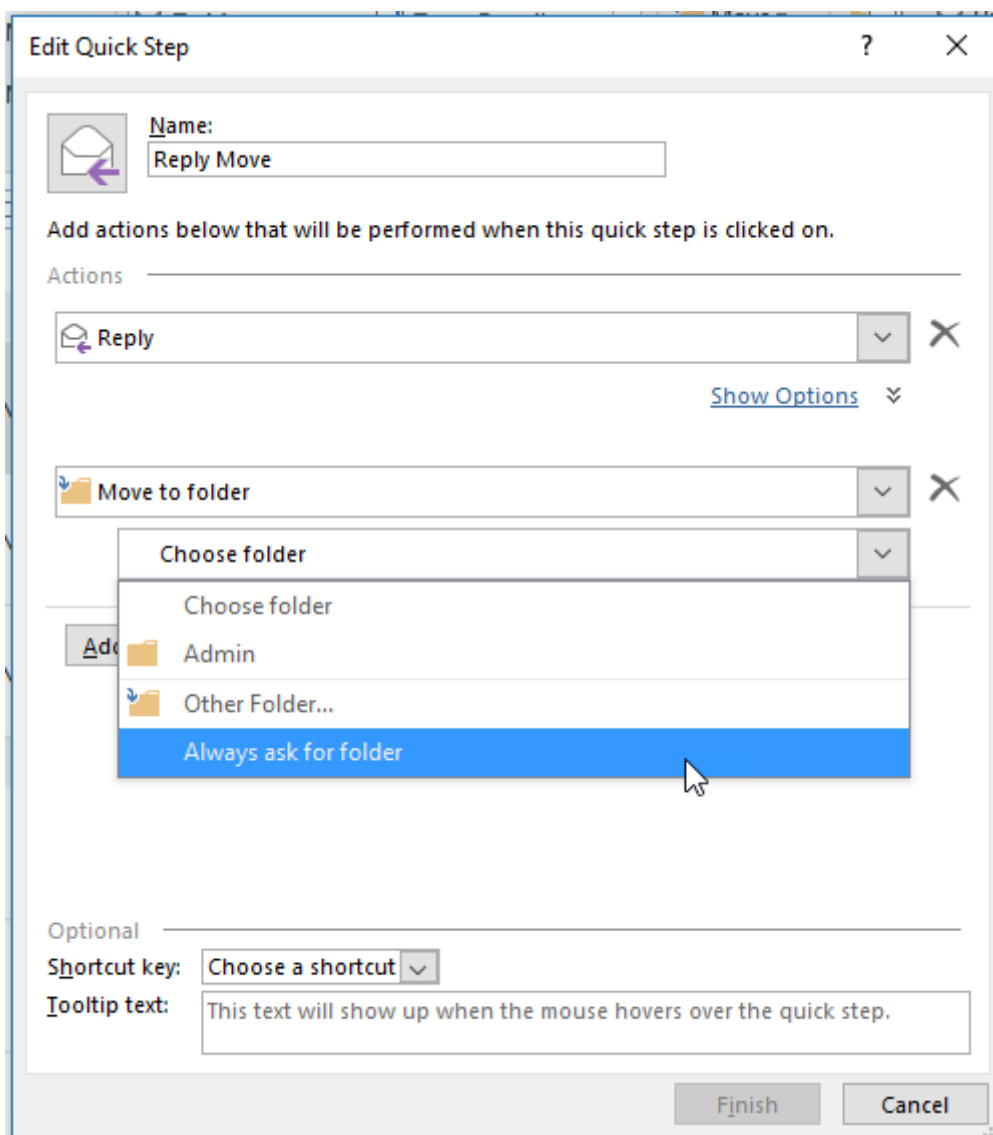
1. Click on the QuickStep to launch it
2. A new email is set up ready for you to address and add any further personalised information
3. Click Send when you are done!

## 10.3 REPLY AND MOVE

In this QuickStep you set up a reply to an email and move the email you are replying to into a folder. This Quickstep has two steps. The Reply and then the Move. You can select an existing folder to move to or request that Outlook prompts you for the folder.

### 10.3.1 REPLY AND MOVE

1. Click Create New
2. Type a name for the QuickStep
3. Select an action – in this case Reply
4. Add another action – in this case Move to Folder
5. Select the folder or select Always ask for folder
6. Click Finish



**Figure 110**

Click on the Quickstep and the first thing that happens is you are prompted for the folder. Select the folder and then you will see your new email, complete the email and send it and then notice that the email you responded to has been moved to the selected folder.

# 11 EMAIL TEMPLATES

## 11.1 CREATING A TEMPLATE FOR EMAIL IN OUTLOOK 2016

There are two ways to create a template in Outlook 2016. You can use the Save as Type when saving an email and select Outlook Template. This puts the template in a special template location. When the time comes to use it, you will need to go and find it. This is done by choosig a form and the best way to do that is to add the Form Chooser to the Quick Access Toolbar.

Now, if you are thinking – hmm there must be an easier way, you would be right.

You can create the template in the normal way but instead of allowing Outlook to dictate where to store it, you can choose where to put it. The new template is then avaiable to you whenever you need it.

### 11.1.1 SET UP THE EMAIL

The first step is to create the email including all the text, images, tables etc. that you want to have included.

### 11.1.2 SAVE THE MESSAGE AS A TEMPLATE

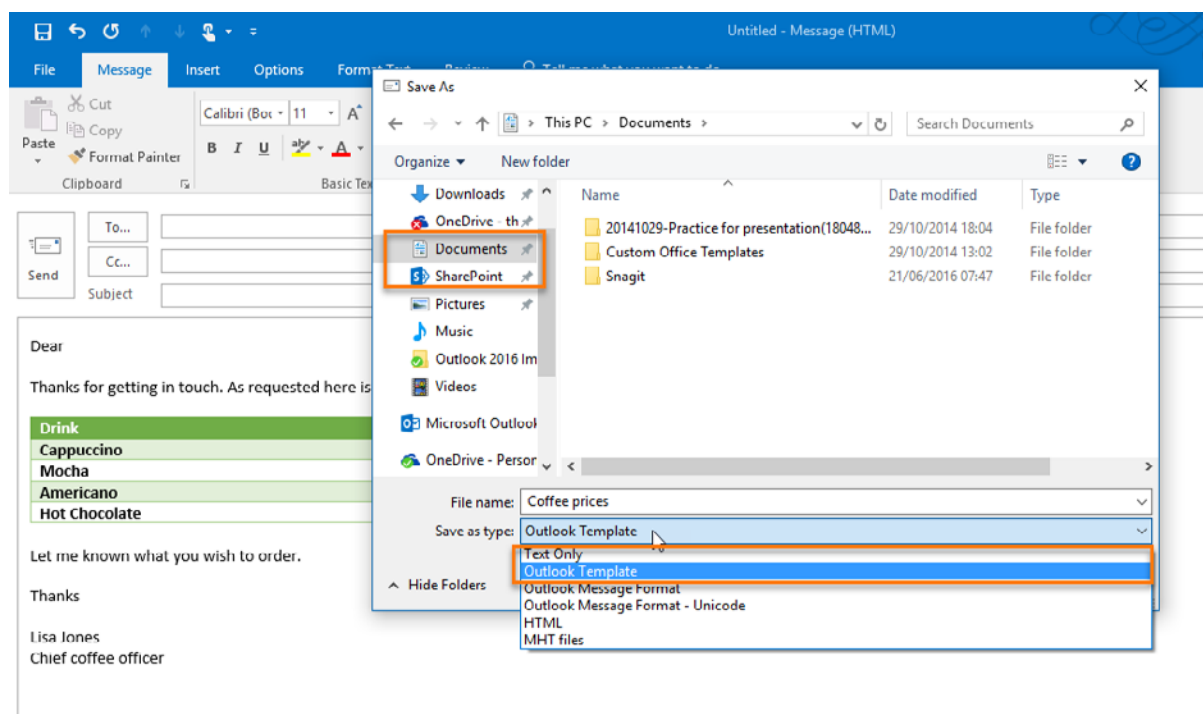


Figure 111 – Save as Outlook template

1. In the message window click the File tab
2. Select Save As
3. Then in the Save As dialogue box change the Save As Type to Outlook Template
4. Type a name in the File Name box (mine is called coffee prices)
5. Choose the folder to put it in – I have used the Documents folder
6. Click save.



- The number 1 MOOC for Primary Education
- Free Digital Learning for Children 5-12
- 15 Million Children Reached

**About e-Learning for Kids** Established in 2004, e-Learning for Kids is a global nonprofit foundation dedicated to fun and free learning on the Internet for children ages 5 - 12 with courses in math, science, language arts, computers, health and environmental skills. Since 2005, more than 15 million children in over 190 countries have benefitted from eLessons provided by EFK! An all-volunteer staff consists of education and e-learning experts and business professionals from around the world committed to making difference. eLearning for Kids is actively seeking funding, volunteers, sponsors and courseware developers; get involved! For more information, please visit [www.e-learningforkids.org](http://www.e-learningforkids.org).

### 11.1.3 SEND AN EMAIL BASED ON A TEMPLATE

Now you have a template you want to send an email with your standard text – here’s how.

Navigate to the folder where the template is stored and double click on it to open.

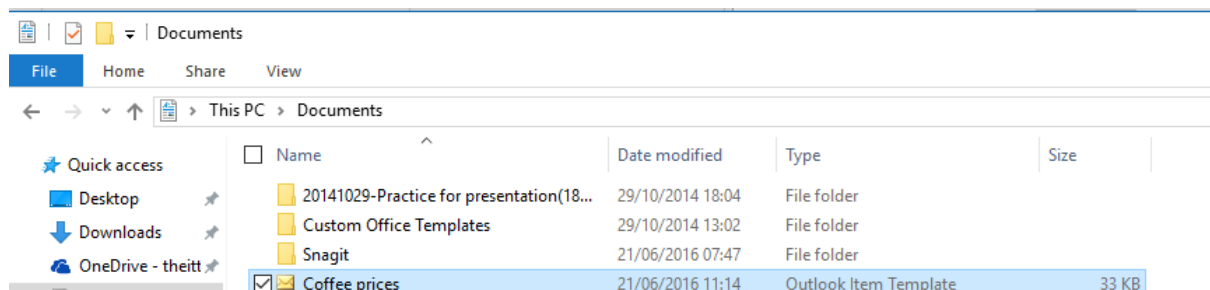


Figure 112

A new untitled message opens up with your text and formatting. It is now ready to be addressed and have a subject line added. You could save it with a subject line too if you wish.

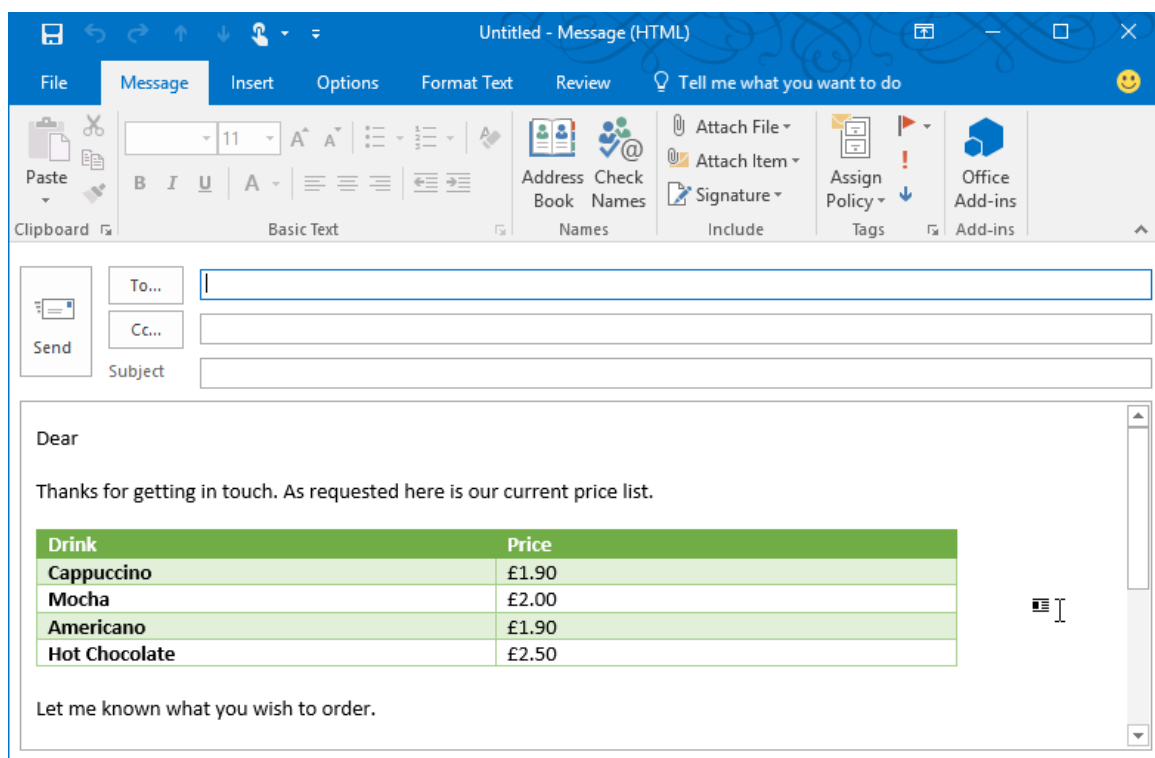


Figure 113

# 12 SEARCH

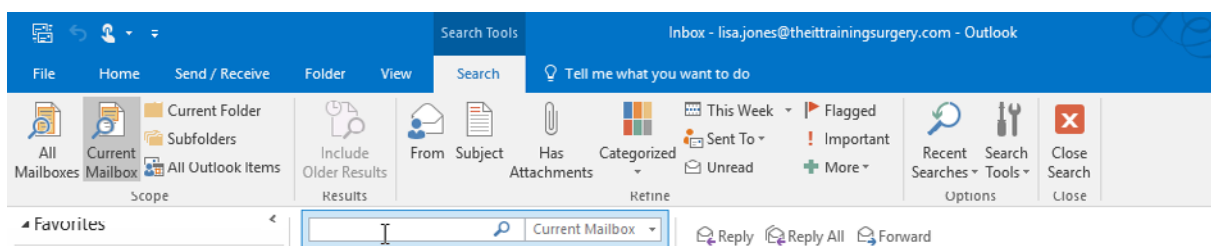
## 12.1 SEARCH FOR EMAIL

You need to find an email. But – you can't remember where it is filed. Never fear, Outlook Search will help you locate that errant email. Not only can Search find one email that matches one criteria, it can find email matching several kinds of criteria too.

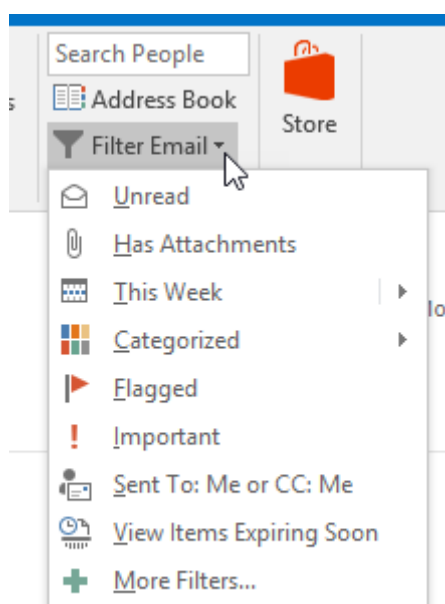
### 12.1.1 THE SEARCH RIBBON

To get to the Search Ribbon:

- Click into the Search bar at the top of the inbox (or any folder you happen to be in) and the Search Ribbon appears
- Press Control and the letter E
- Use the Filter icon to find email



**Figure 114** – The search ribbon



**Figure 115** – The find or filter button

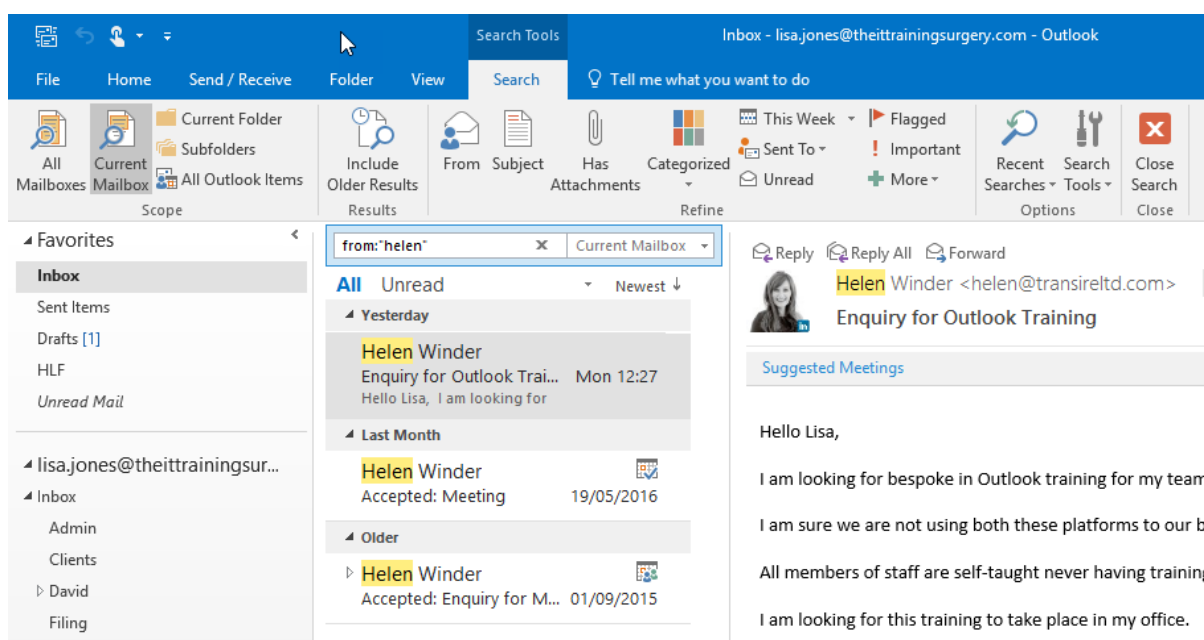
### 12.1.2 SEARCH CRITERIA

When you filter or search, you tell Outlook what to look for.

- **Unread** – finds all messages that have not yet been read,
- **Has Attachments** – finds all messages that have attachments.
- **This Week** – set the date range in which to search.
- **Categorised** – find messages that have a particular category.
- **Flagged** – find flagged messages.
- **Important** – find messages marked important.
- **Sent To: Me or CC: Me** – finds messages where my(your) name is in the sent to or CC to box.
- **View Items Expiring Soon** – this filters out any items that have an expiry date set.

### 12.1.3 FIND ITEMS FROM

1. Click into the search box
2. Click on From in the Search Ribbon
3. Type the name of the person whose email you want to find
4. Press Enter

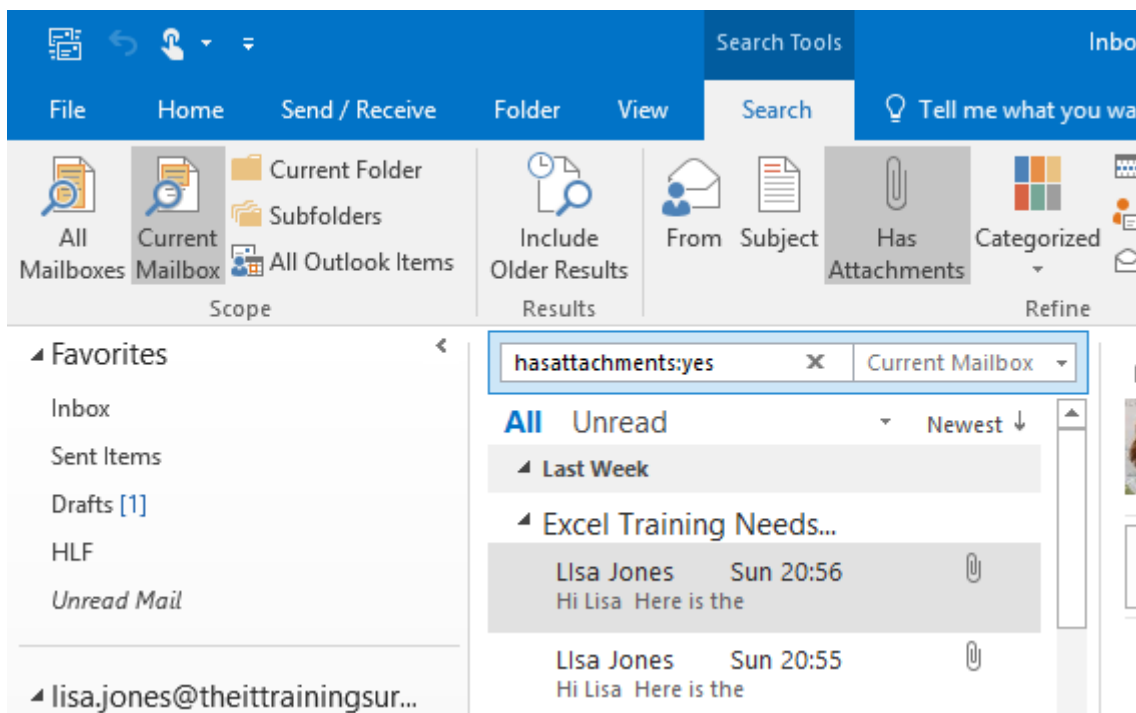


**Figure 116** – From

All email that match the criteria are displayed with the criteria highlighted in yellow.

### 12.1.4 HAS ATTACHMENTS

1. Click into the search box
2. Click on Has Attachments
3. Press Enter



**Figure 117** – Find email with attachments

A list of email with attachments is now displayed.

You can combine more than one search criteria so to find all email from Helen with an attachemnt I would add both of those criteria.

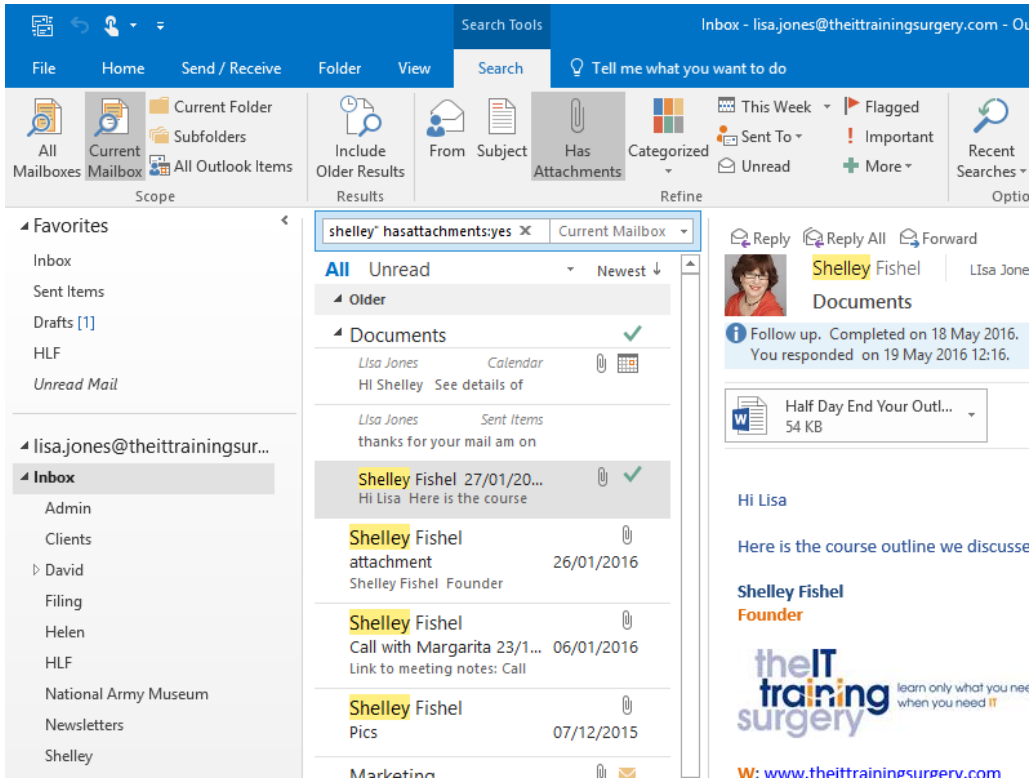


Figure 118 – From Shelley with attachments

## 12.2 USING THE FILTER ICON

The filter icon is on the Home Ribbon and contains a drop down of the most frequent searches. You can use this just as easily as the Search Ribbon so long as you are looking for one of these options.

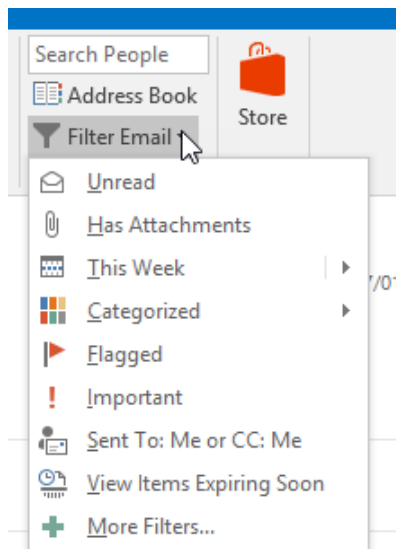


Figure 119 – The filter button on the home ribbon

# 13 SEARCH FOLDERS

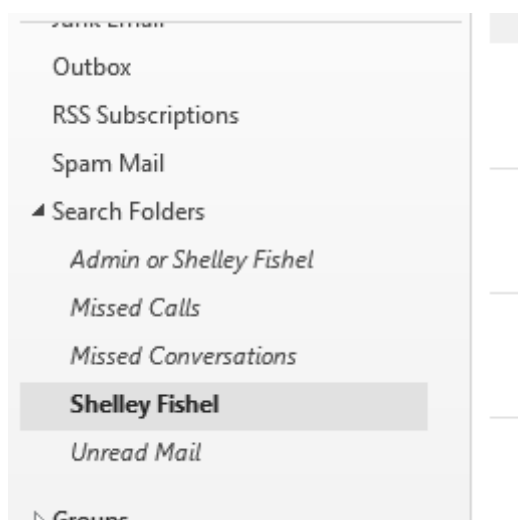
## 13.1 SEARCH FOLDERS

Is there a particular search that you perform several times a day? Do you always need to find email from a particular contact and that email might be saved in any one of several folders?

A Search Folder will help with either of those scenarios.

A Search Folder is a folder that holds all emails that match the criteria no matter which folder they are stored in. It is kept up to date all the time and if you delete the Search Folder, you keep the email as the emails are not stored in the folder itself – they are simply referenced or fetched each time you go into the folder.

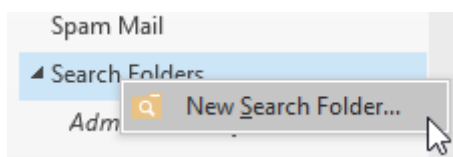
### 13.1.1 WHERE ARE SEARCH FOLDERS?



**Figure 120** – Search folders

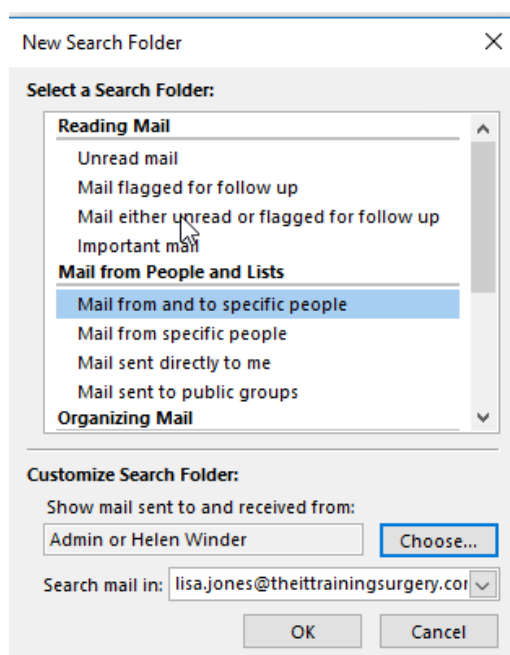
Search folders live in the Navigation Pane and are created in the Inbox and at the same level as the Inbox.

### 13.1.2 CREATE A SEARCH FOLDER



**Figure 121** – Create your own search folder

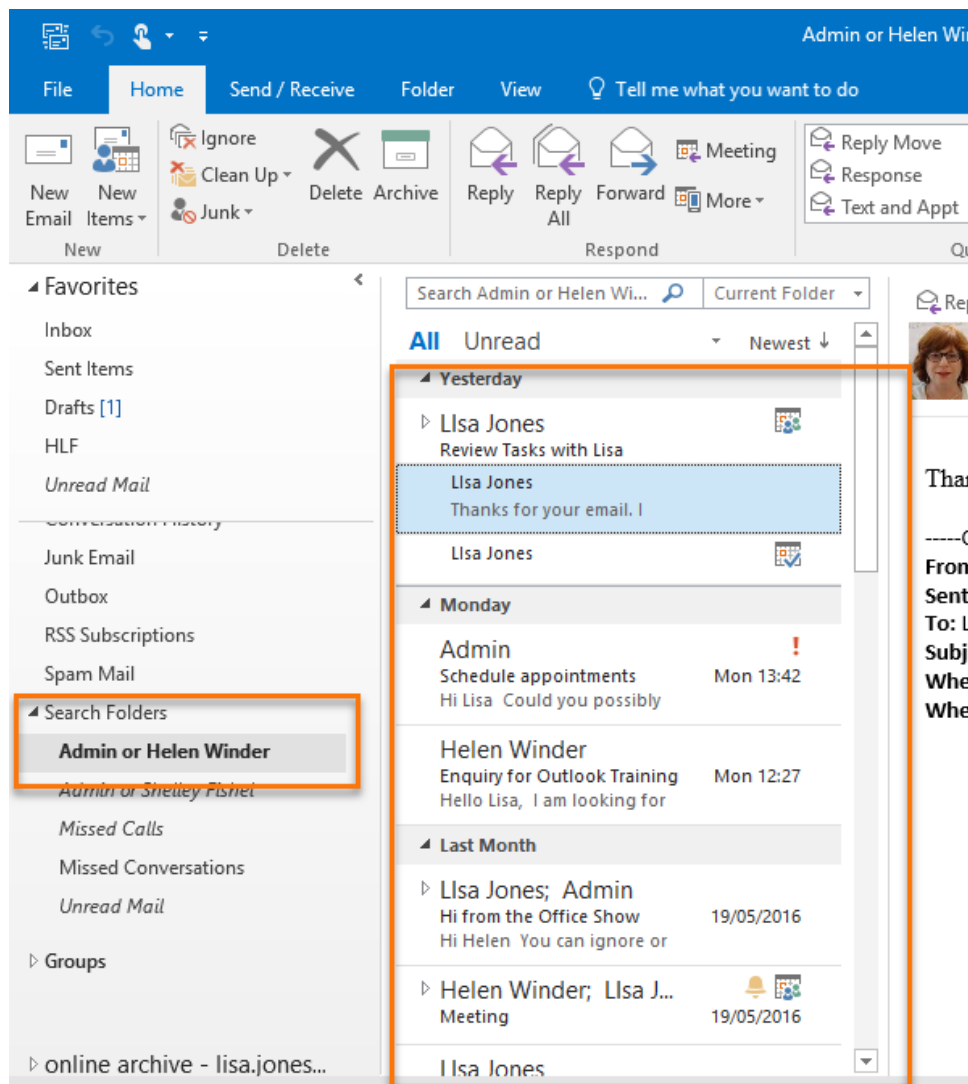
1. Right Click on Search Folders and then click on New Search Folder
2. Start to set criteria



**Figure 122** – Set criteria

3. Select the type of Search Folder to start from – in my example I have chosen to find all email that has been sent to or from a particular person.
4. Click Choose
5. Select the contact from the address book or type it in
6. Click OK

In this example, I have double clicked on Admin from the list to find all email from Admin and I have also typed in an email address for Helen as I would like to find all email to and from Helen as well.



**Figure 123** – Search folder always up to date

7. The new Search Folder is listed in the Navigation Pane
8. All the emails in the list are either to or from the contacts I specified – i.e. Helen or Admin.

# 14 CALENDAR

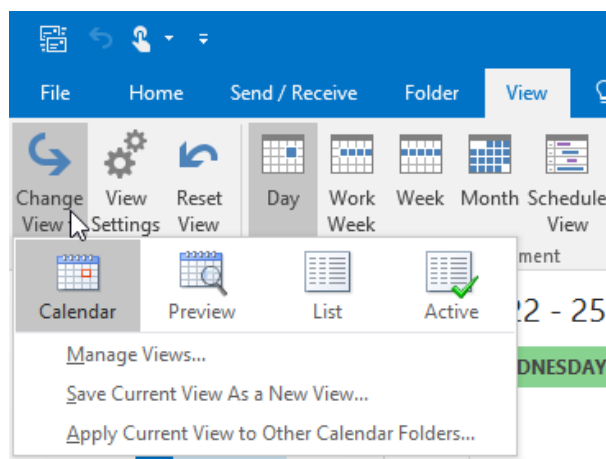
## 14.1 THE CALENDAR

Most people will spend a large proportion of time in meetings. Outlook 2016's Calendar features can help you work with the Calendar more efficiently.

## 14.2 CALENDAR VIEWS AND ARRANGEMENTS

There are four main views of the Calendar and your views can be arranged to suit the way you work.

### 14.2.1 FOUR VIEWS



**Figure 124** – Calendar views

From the View Ribbon click on Change View and select from one of the following:

**Calendar** – see the standard view where you can see the calendar in the Day, Week, Work Week, Month or Schedule View.

**Preview** – in the Day, Week, Work Week arrangements, Preview view shows more information about appointments including information from the notes part of the appointment – space permitting.

**List** – This view displays all appointments meetings and events in your calendar as a list.

**Active** – This shows all future active appointments events and meetings.

When working in List view you can group calendar items by selecting a field.

### 14.2.2 ARRANGEMENTS

Calendar arrangements are how you display the calendar when in Calendar View.

**Day** – show only appointments, events and meetings for one day.

**Week** – show appointments, events and meetings for a whole week, including the weekend.

**Work Week** – show appointments, events and meetings for the week – Monday to Friday (exclude weekends).

**Month** – show a whole month of your calendar.

**Schedule View** – This view shows a horizontal arrangement of the timeline and is useful for comparing time periods for multiple calendars.



**FACTCARDS**

Are you working in academia, research or science? And have you ever thought about working and moving to the Netherlands?

**Arriving** 33

**Living** 50

**Studying** 51

**Working** 101

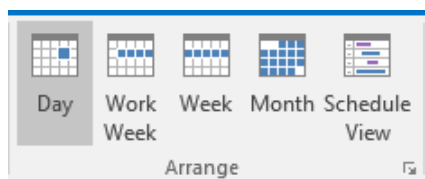
**Research** 50

Factcards.nl offers all the **information** that you need if you wish to proceed your **career** in the **Netherlands**.

The information is ordered in the categories arriving, living, studying, working and research in the Netherlands and it is freely and easily accessible from your smartphone or desktop.

**VISIT FACTCARDS.NL**

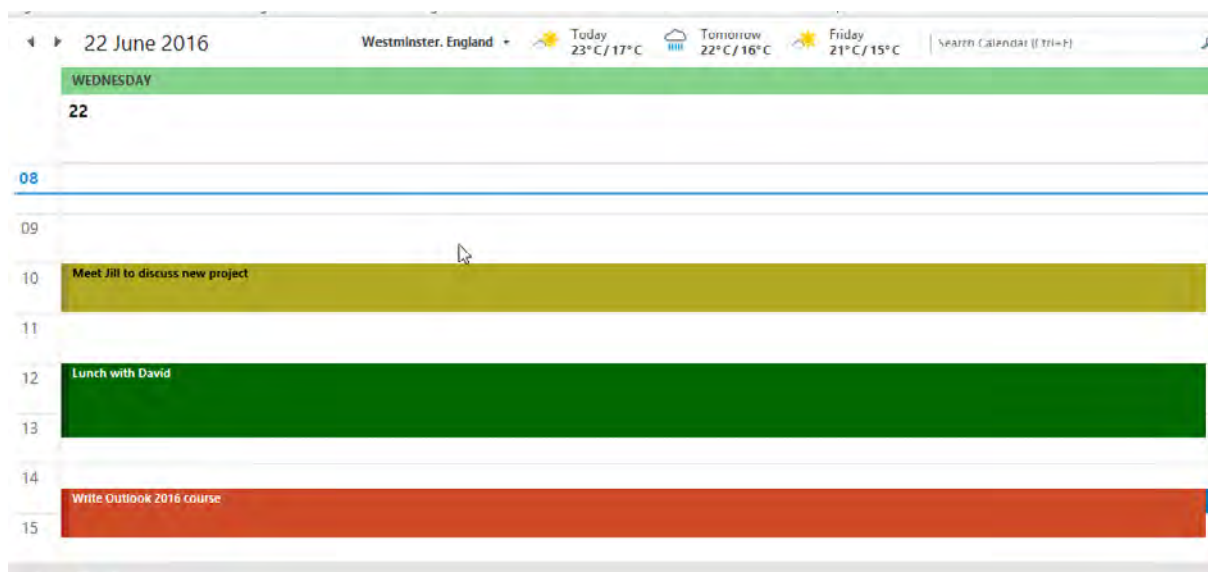
### 14.2.3 CHANGE THE ARRANGEMENT



**Figure 125** – Calendar arrangement

Click the icon to display the calendar arrangement required.

### 14.2.4 DAY VIEW



**Figure 126** – Day view

This view shows just what is on the calendar for the specified day.

### 14.2.5 WORK WEEK

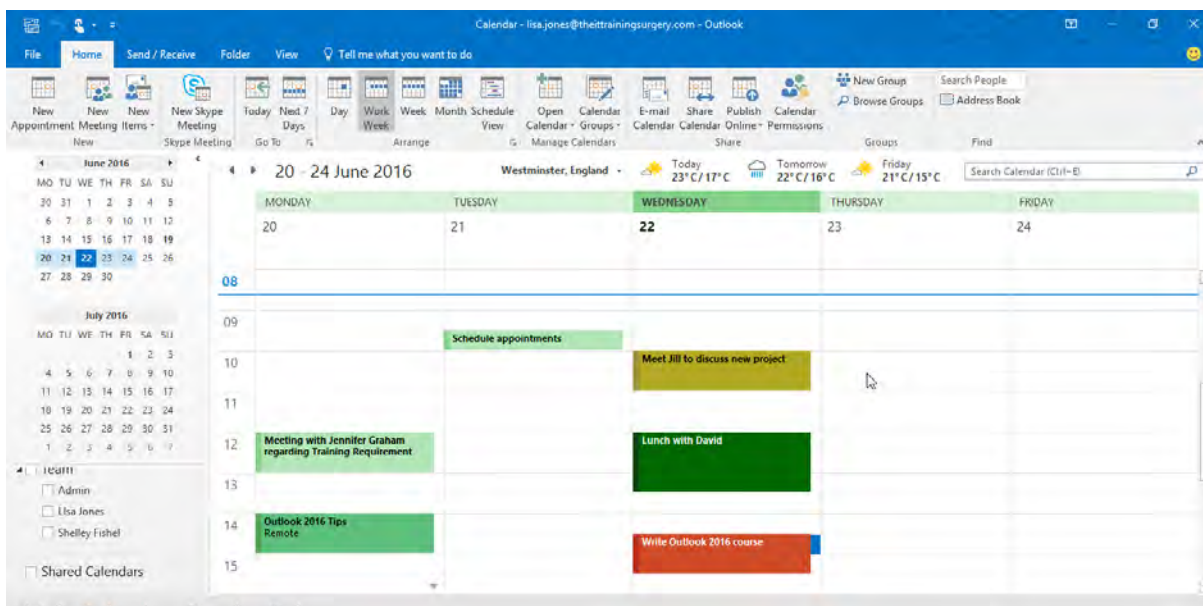


Figure 127 – Work week

This arrangement shows Monday to Friday only.

### 14.2.6 WEEK

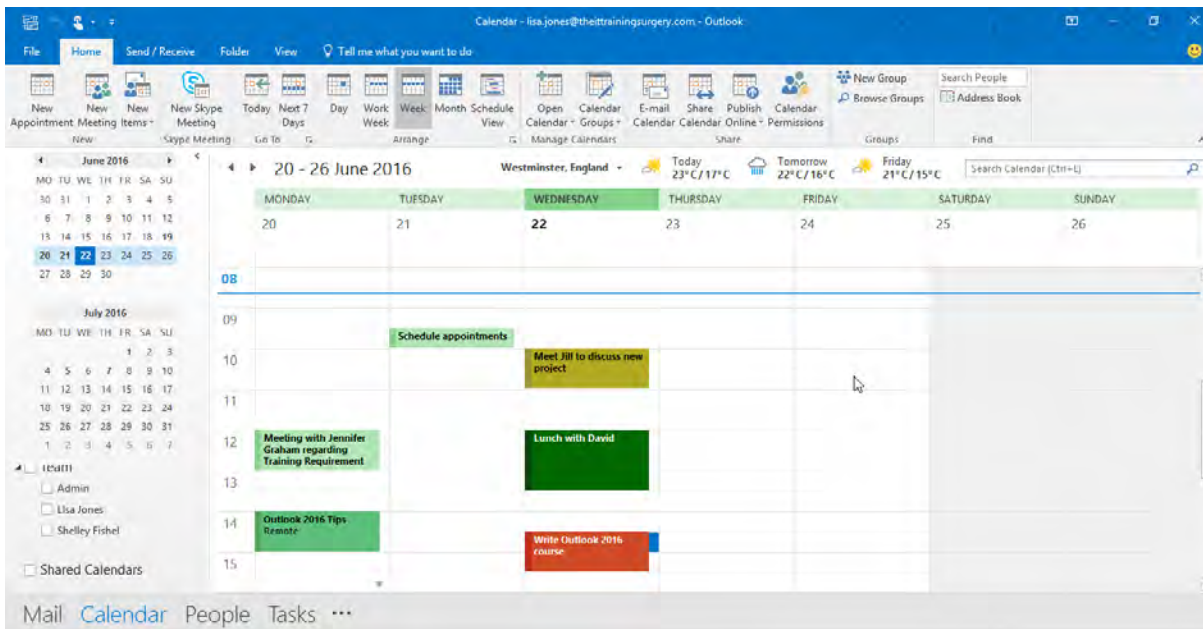


Figure 128 – Week to view

See appointments for the whole week including Saturday and Sunday.

### 14.2.7 MONTH

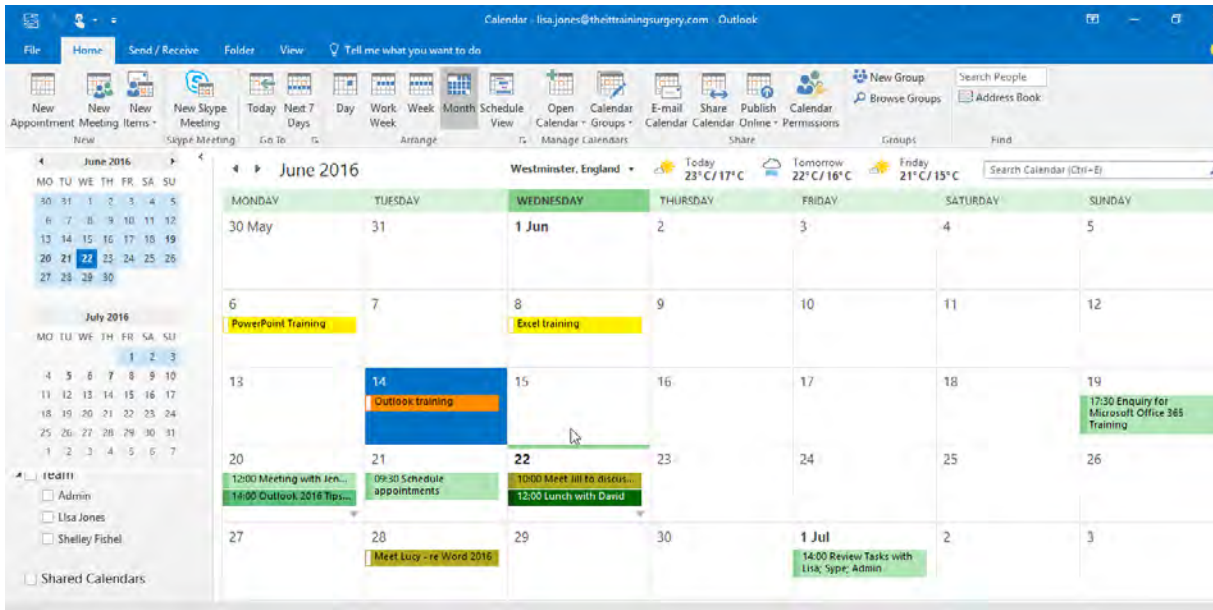


Figure 129 – View a month

When in Month view, there is less detail showing. On a day where there are more appointments than space a small downward facing arrow is displayed in the bottom corner of that day.

### 14.2.8 SCHEDULE VIEW

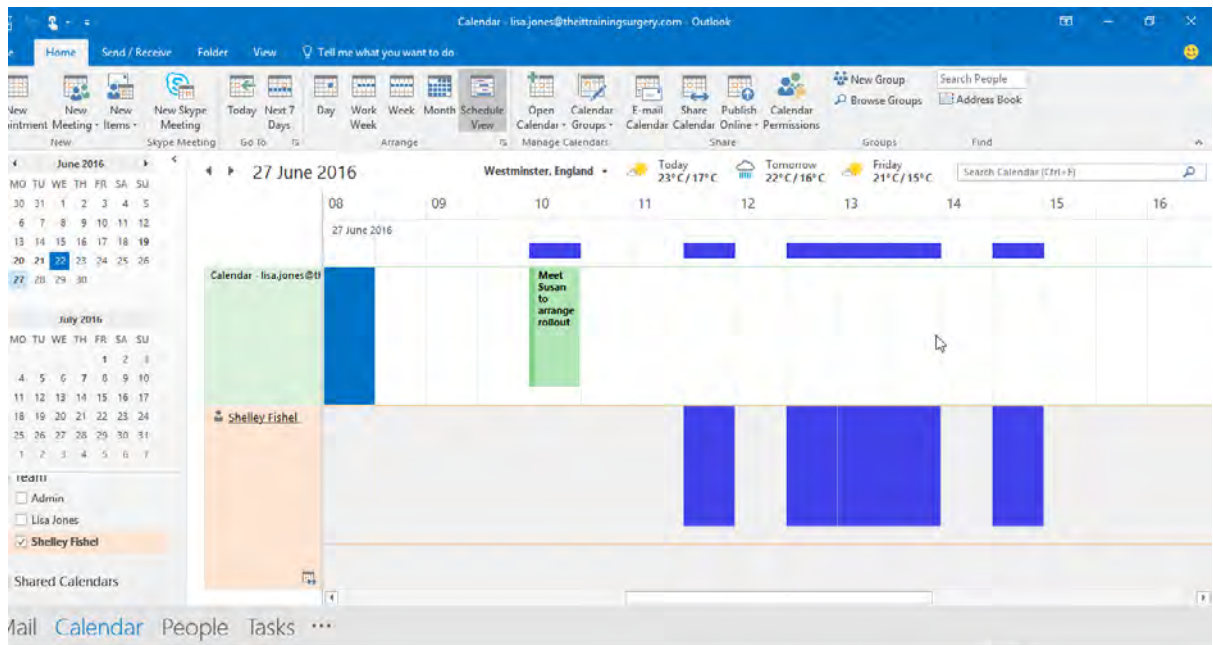


Figure 130 – View schedules for more than one person

See two or more calendars arranged in a timeline to see what is happening together. Works in day view best.

### 14.3 TIMESCALE

Use the Timescale to set how much time to display for each appointment on your calendar.

#### 14.3.1 TIMESCALE

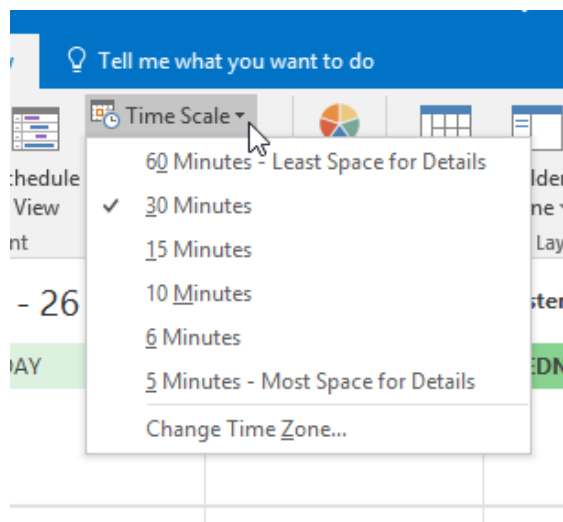


Figure 131 – Set the timescale for appointments

### 14.4 OPEN OTHER CALENDARS

When working in an organisation, you may need access to other people’s calendars. Once you have opened someone’s calendar for the first time, it is very simple to switch it on or off.

#### 14.4.1 OPEN CALENDAR

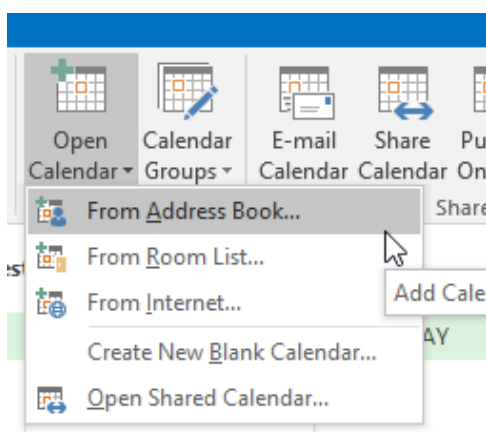


Figure 132 – Open someone else's calendar

Click Open Calendar on the Home Ribbon.

Select the option you want to use.

### 14.4.2 OPEN FROM ADDRESS BOOK

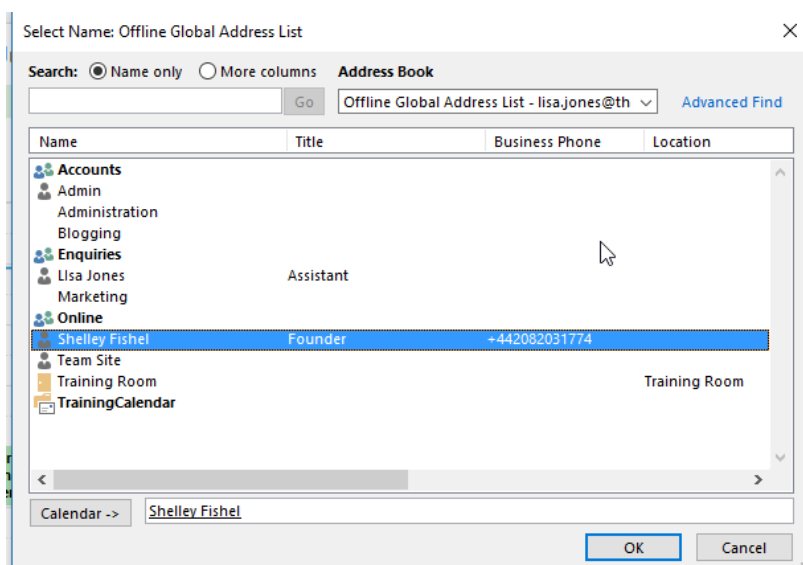


Figure 133 – Find the calendar in your global address book

1. Click Open Calendar
2. Click on From Address Book
3. Select the person whose calendar you want to open – double click or click Calendar at the bottom
4. Click OK

### 14.4.3 CALENDARS OPEN SIDE BY SIDE

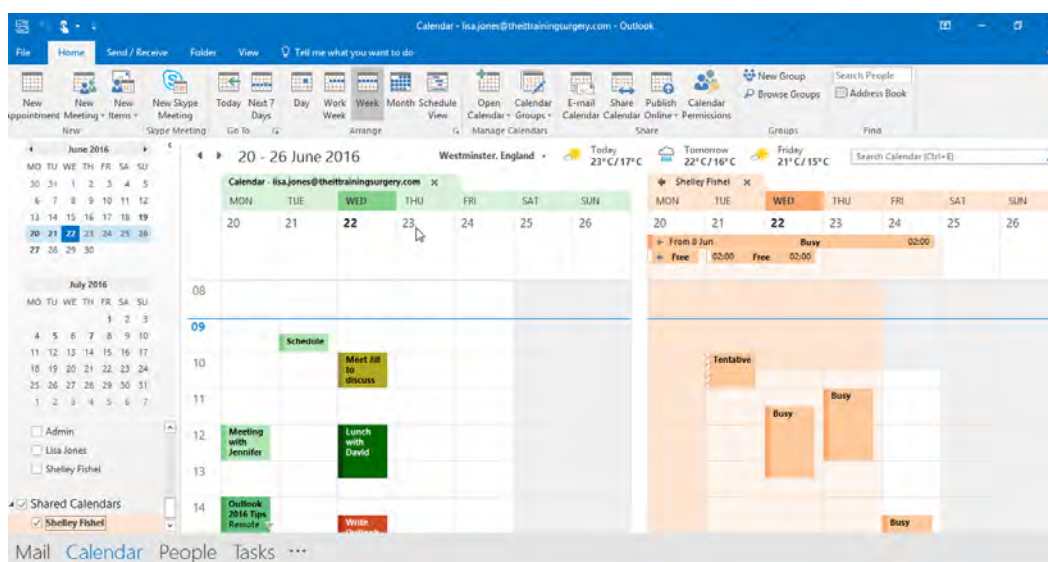
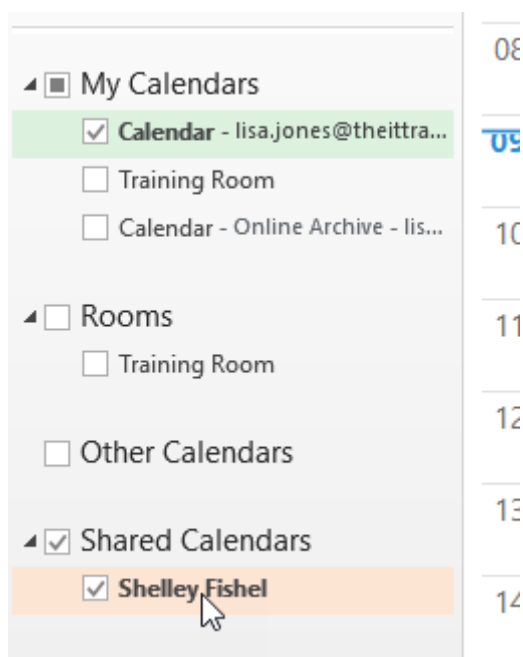


Figure 134 – See calendars side by side

The two calendars are displayed side by side.

#### 14.4.4 OPEN FROM THE NAVIGATION PANE



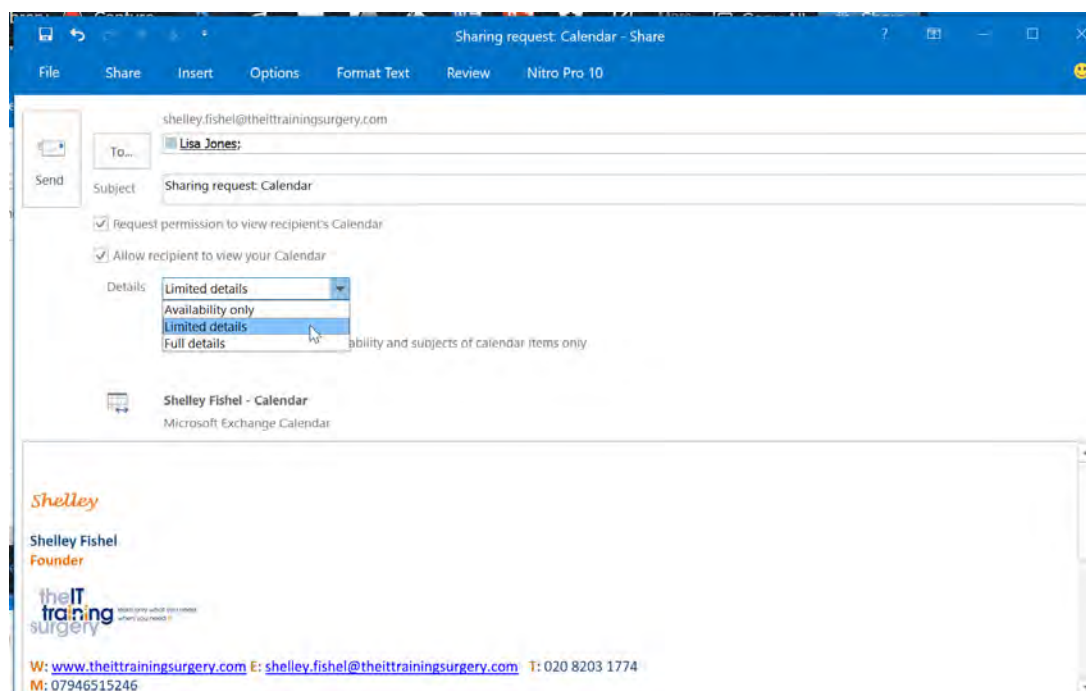
**Figure 135** – Select the calendar from the navigatino pane

Tick the box next to the calendar you want to open.

#### 14.5 SHARE CALENDARS

Within your organisation you can see everyone's free or busy time. However you may need to see more detail and you may also need to create or edit appointments in someone else's calendar.

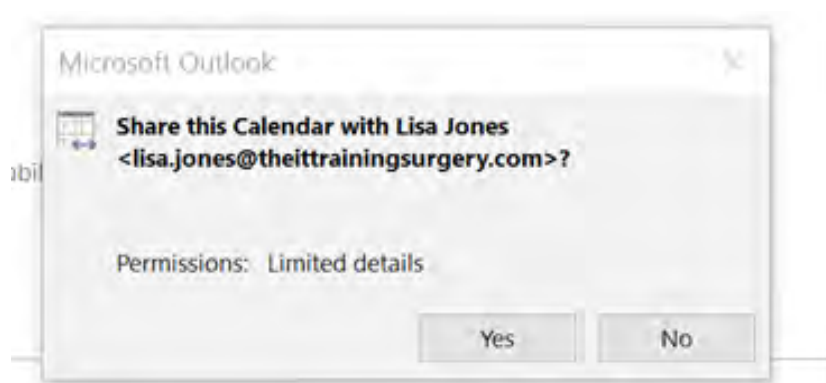
### 14.5.1 SHARE YOUR CALENDAR



**Figure 136** – Share calendars

1. Click Share Calendar in the Share group on the Home Ribbon
2. Address the invite to the person with whom you want to share
3. Set the details level – availability only, limited details or full details
4. Tick the box request permission to view recipient's calendar (if you need to do this)
5. Type a message into the body of the invite (optional)
6. Click Send.

### 14.5.2 CONFIRM SHARING



**Figure 137** – Confirm you want to share

7. Click yes to confirm that you do want to share this calendar.

### 14.5.3 SHARING INVITATION RECEIVED

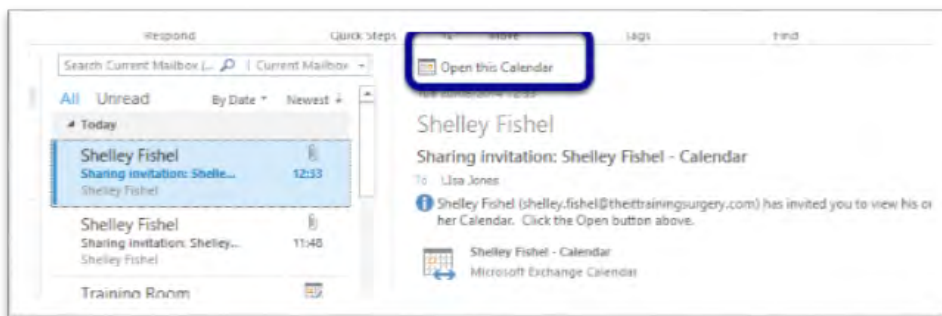


Figure 138 – Open the calendar shared with you

An email invitation is received. The shared calendar can be opened directly from the email by clicking on Open this Calendar.

### 14.5.4 CALENDAR IS PLACED IN NAVIGATION PANE

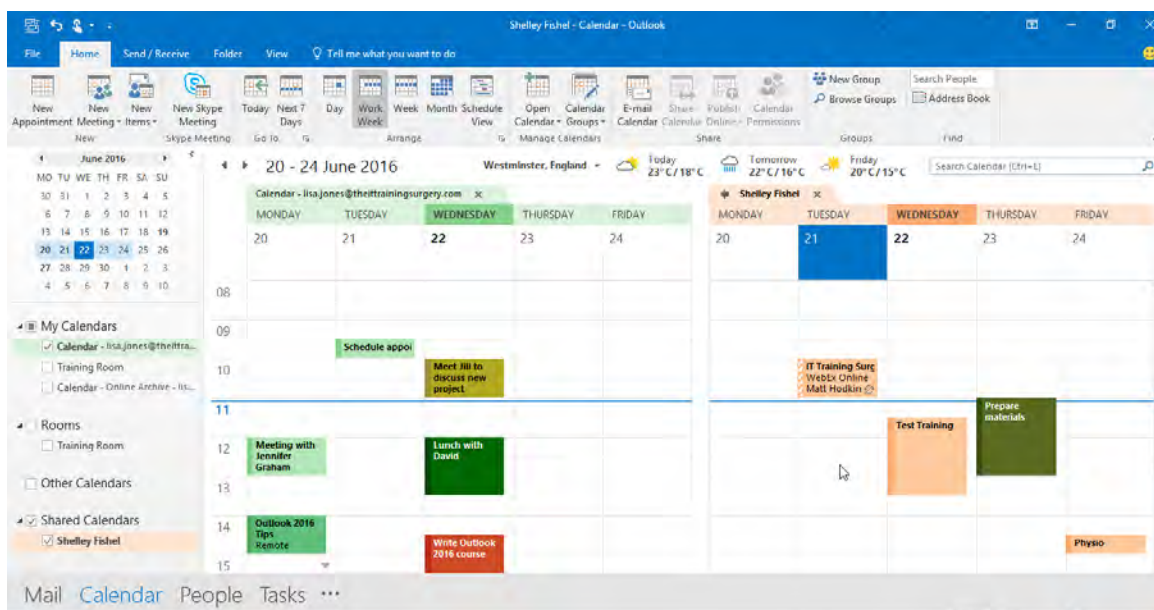


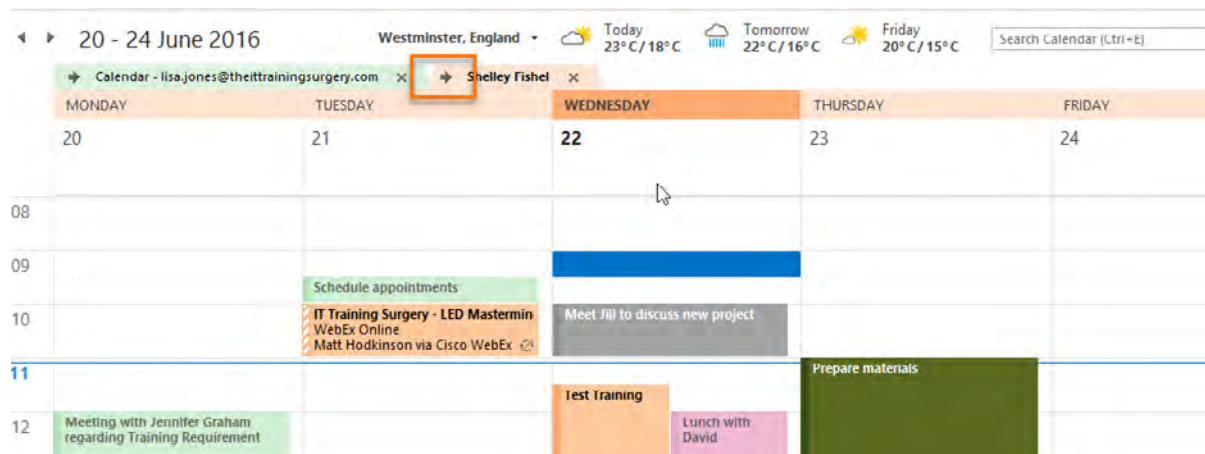
Figure 139 – Open the calendar any time from the navigation pane

The shared calendar opens up and is displayed next to the default calendar. A tick box appears in the Navigation Pane which will allow you to show or hide the shared calendar whenever you want to.

## 14.6 CALENDAR OVERLAY

Calendar overlay allows you to overlay one calendar on top of another. This makes looking for a time where all parties are free much easier. This is particularly useful if you want to compare more than three calendars as it can be difficult to see more than this side by side.

### 14.6.1 OVERLAY ARROW



**Figure 140** – Overlay calendars

Click the Calendar Overlay arrow to overlay the selected calendar on top of the one to its left.

The two calendars now appear as if one is sitting on top of the other. The appointments show through so it is a simple exercise to see where there is a time when both people are free.

When the calendars are in overlay mode, the arrow changes and points to the right. This will make the calendars show in individual spaces.

## 14.7 CALENDAR GROUPS

Occasionally you need to open several calendars at the same time. Perhaps you are all part of a team. By creating a Calendar Group this can be accomplished with one click.

### 14.7.1 CREATE A CALENDAR GROUP

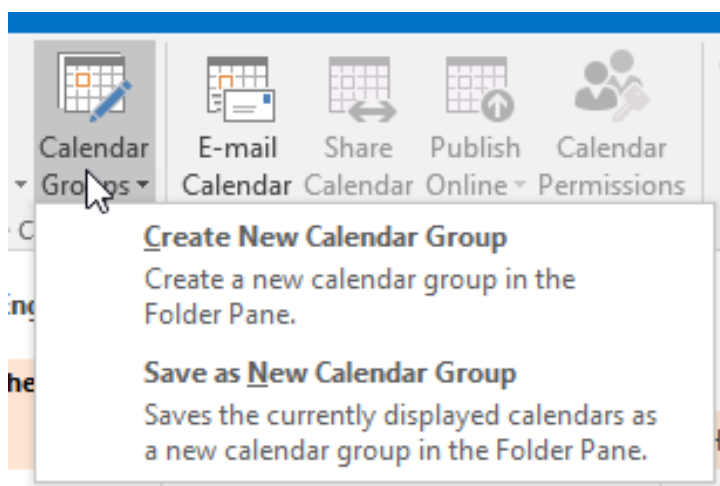
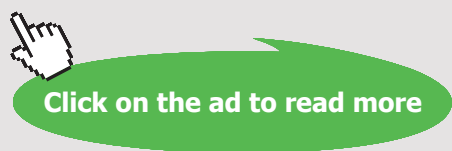
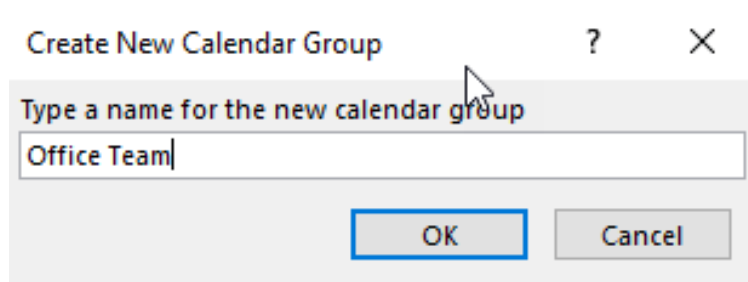


Figure 141 – Create a calendar group

Choose to create a brand new Calendar Group or to save the currently displayed calendars as a new Calendar Group.



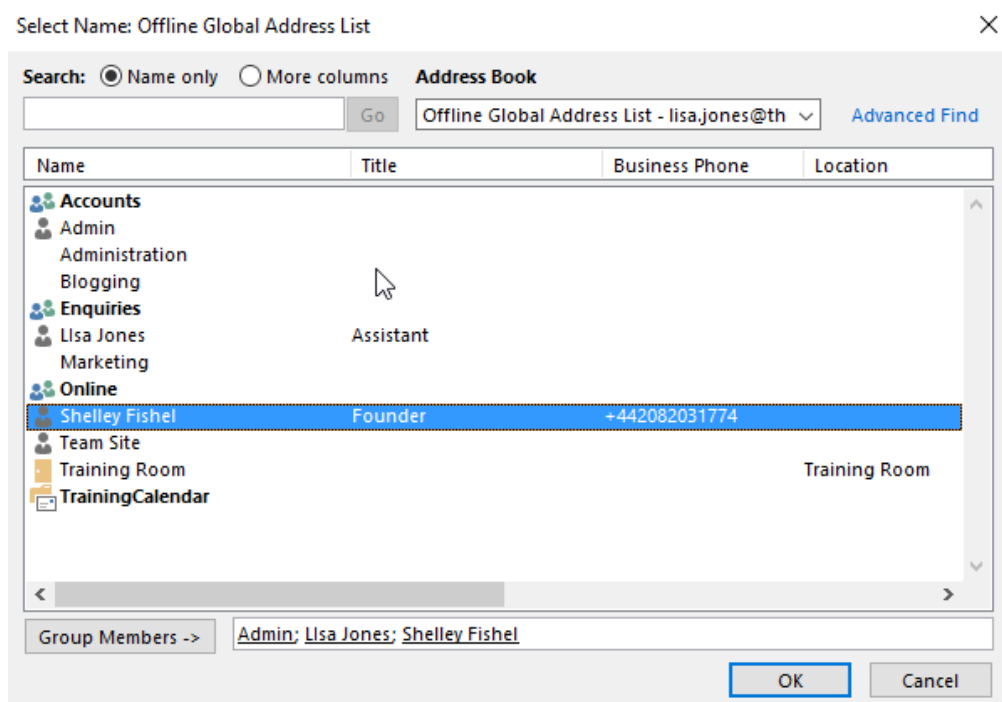
### 14.7.2 NAME THE CALENDAR GROUP



**Figure 142** – Name the group

1. Type a name for the calendar group
2. Click OK

### 14.7.3 SELECT GROUP MEMBERS



**Figure 143** – Choose group members

1. Double click on each of the names to include – they will appear in the Group Members area at the bottom.
2. Click OK

### 14.7.4 NEW GROUP DISPLAYED

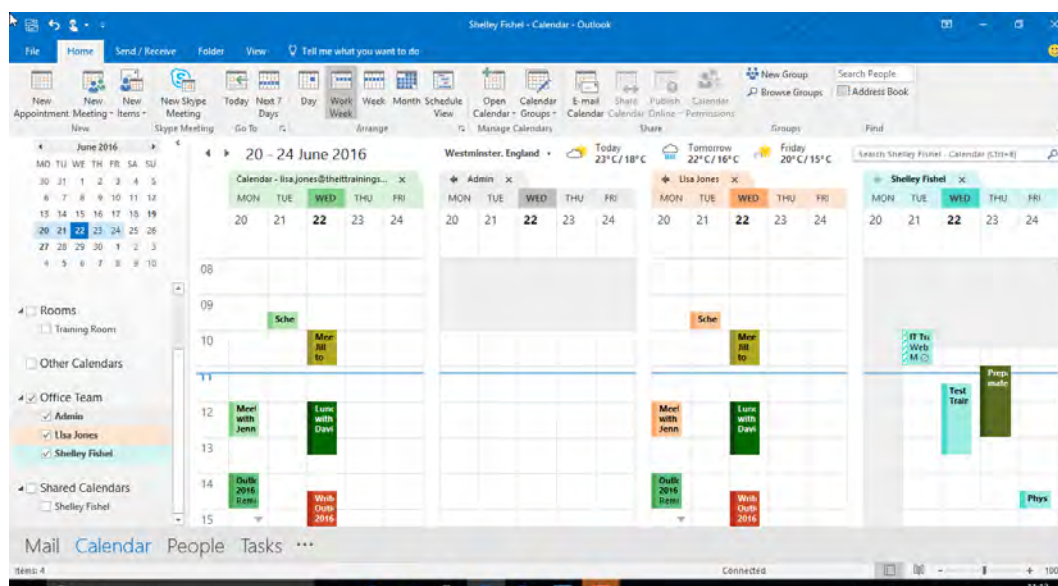


Figure 144 – New calendar group can be opened from the navigation pane

The new calendar group appears in the Navigation Pane with a tick box for the whole group and individual tick boxes for each calendar. This means that you can open all the calendars in the group in one go by ticking the group calendar name. Or you can open individual calendars by ticking each box individually.

### 14.7.5 CALENDAR GROUP DISPLAYS IN SCHEDULE VIEW

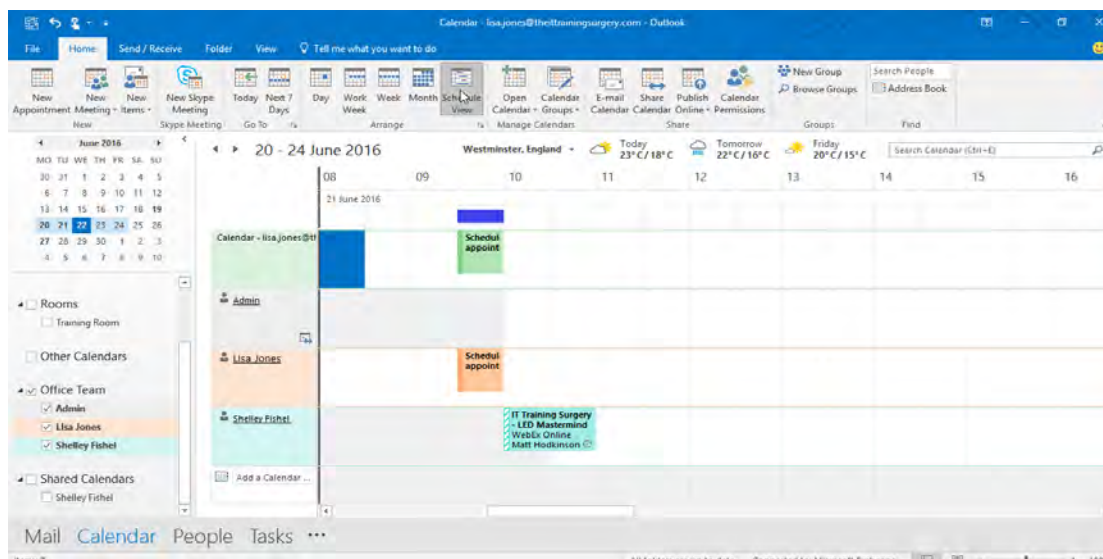


Figure 145 – See the calendars in schedule view

A Calendar Group will sometimes open in Schedule View. You can change the view by using the view icons in the Arrange group on the Home Ribbon.

## 14.8 APPOINTMENTS

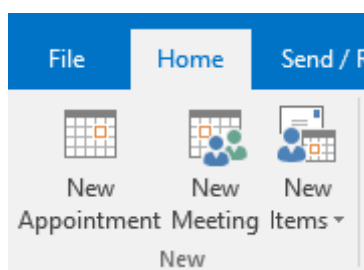
There are three types of appointments in Outlook.

**Appointment** – an appointment is between you and your calendar. It is not shared and is there for your information.

**Meeting** – once you invite someone along you have a meeting.

**Event** – this is an all-day event. Might be a birthday, anniversary or holiday and they appear along the top of the calendar without a start and end time.

### 14.8.1 ICONS



**Figure 146** – Create a new appointment

Any appointment can become a meeting by inviting people along. However there is no need for the extra clicks. Simply use a New Meeting request and you are all set.

An all-day event is a tick box on an appointment. Any appointment can be turned into an all-day event by ticking the box. When the box is ticked the start and end times are greyed out.

### 14.8.2 CREATE A NEW APPOINTMENT

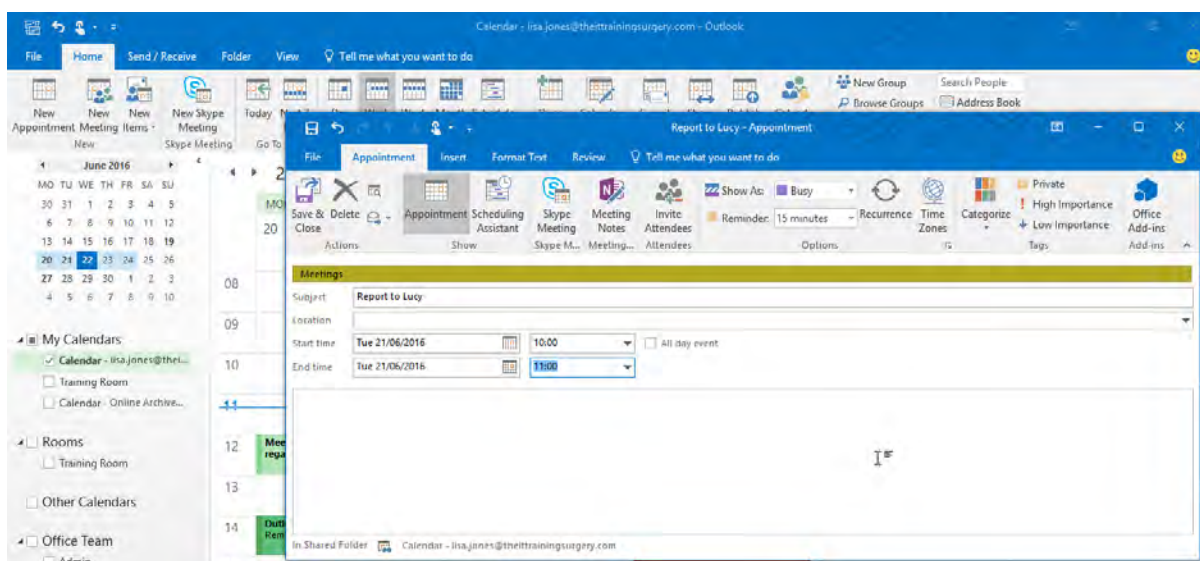


Figure 147 – New appointment

1. Click the New Appointment Icon
2. Fill in the subject of the appointment
3. Complete the date and time
4. Add a category if required
5. Type any details in the body of the appointment
6. Click Save and Close when done

### 14.8.3 ALL DAY EVENT

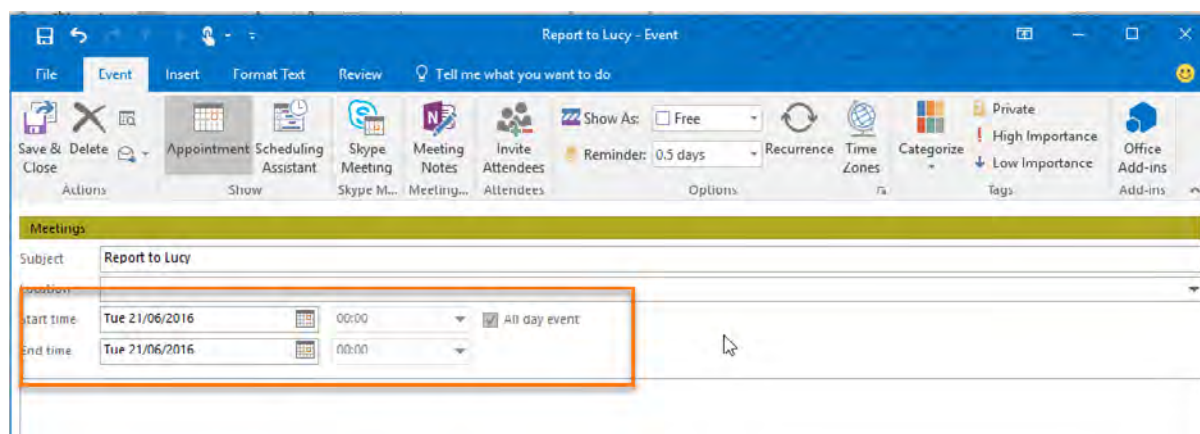


Figure 148 – Tick the box to create an all day event

If this is an all-day event, tick the all-day event box. The timings will now be greyed out so that you can only select the date of the event.

## 14.9 MEETINGS

A meeting occurs when there is more than one person going. To speed things up use the New Meeting button.

### 14.9.1 CREATE A NEW MEETING

1. Click New Meeting and a meeting request opens up ready to address

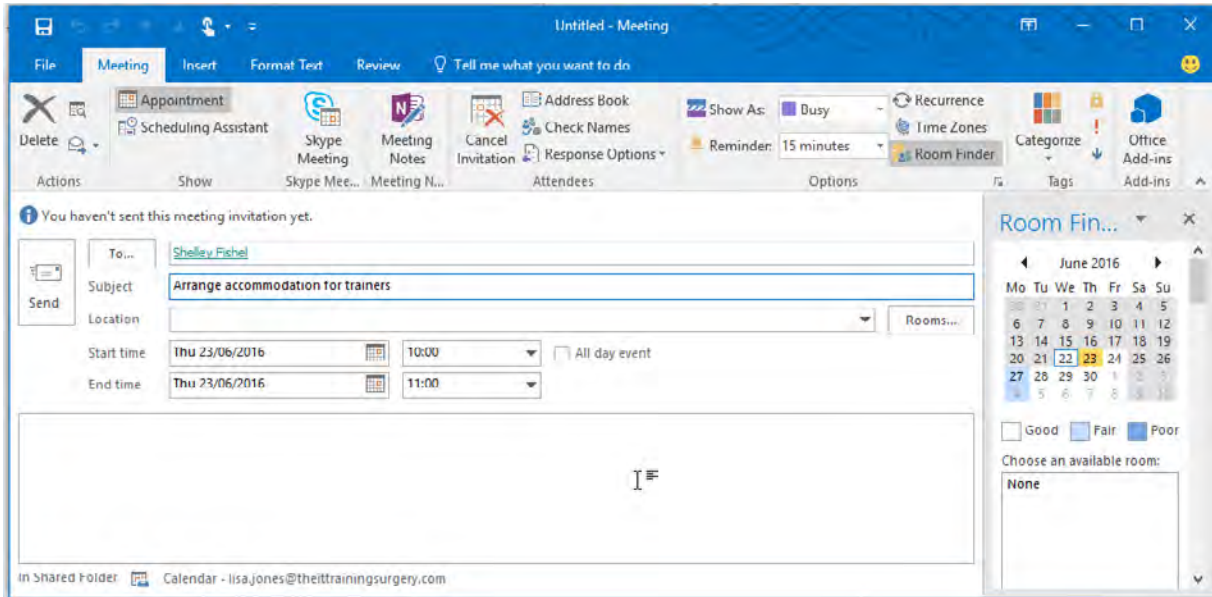


Figure 149 – Create a new meeting

2. Type the email address of the invitee
3. Set the date and time
4. Click Send

### 14.9.2 RESPOND TO THE MEETING REQUEST

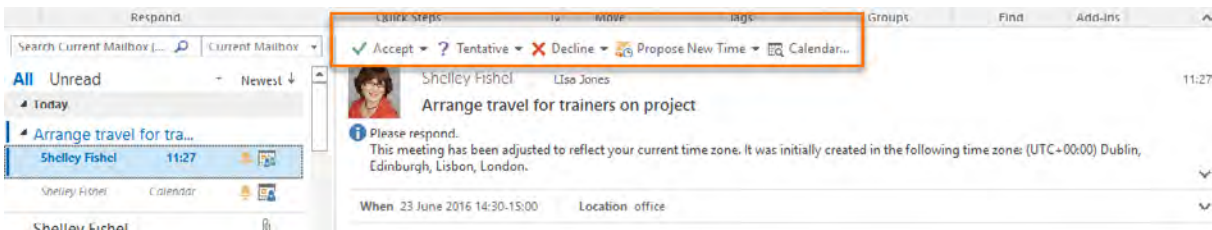


Figure 150 – Accept or reject the invite

Click on the option you want to use. Note that in the picture above there is an extra message as Shelley is currently in a different time zone. When working across time zones, Outlook will adjust the calendar invite and show it at the correct time in all locations. This assumes that you have set your laptop to automatically update the time zone in another country.

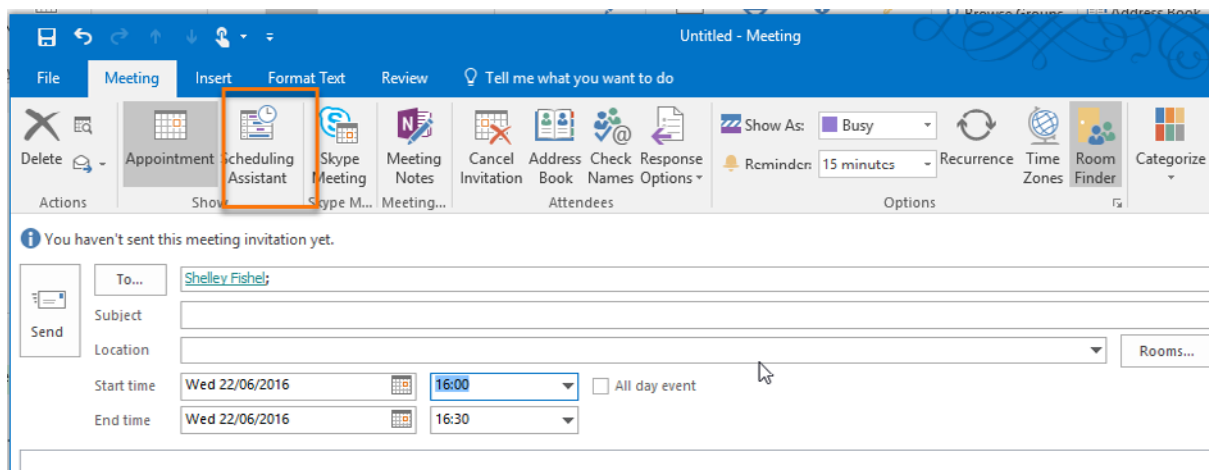
## 14.10 THE SCHEDULING ASSISTANT

Use the scheduling assistant to see if the people you invite to your meeting are free – before you send out all the invites!

### 14.10.1 SET UP THE MEETING

Create a New Meeting request and add the invitees – select them from the address book or type in their email addresses.

### 14.10.2 CLICK SCHEDULING ASSISTANT



**Figure 151** – Click scheduling assistant to see everyone's diaries

Once you click Scheduling Assistant you can see who is free and who is busy

### 14.10.3 FREE BUSY

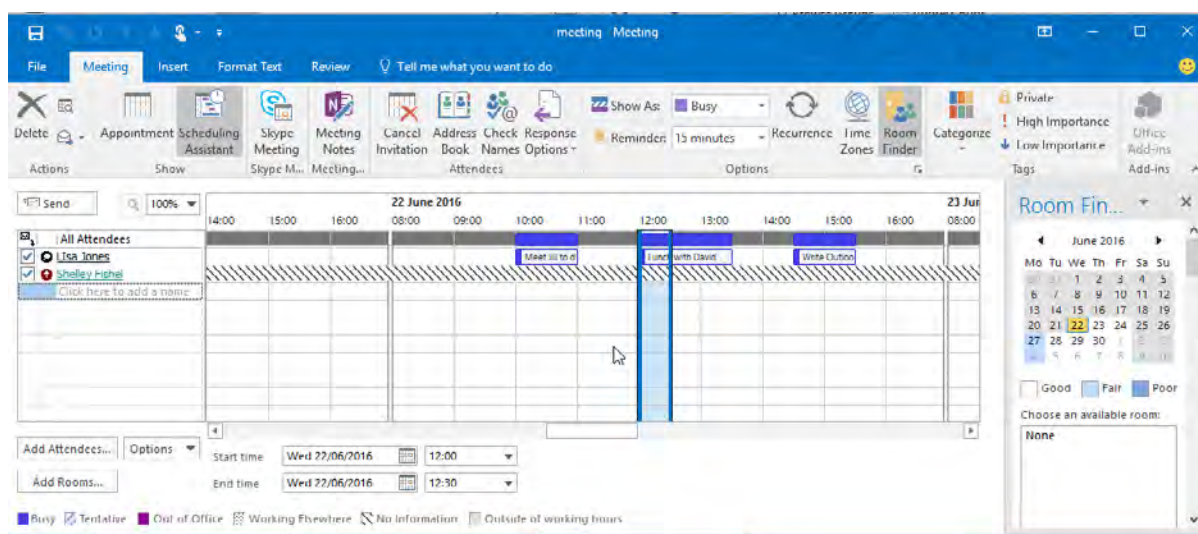


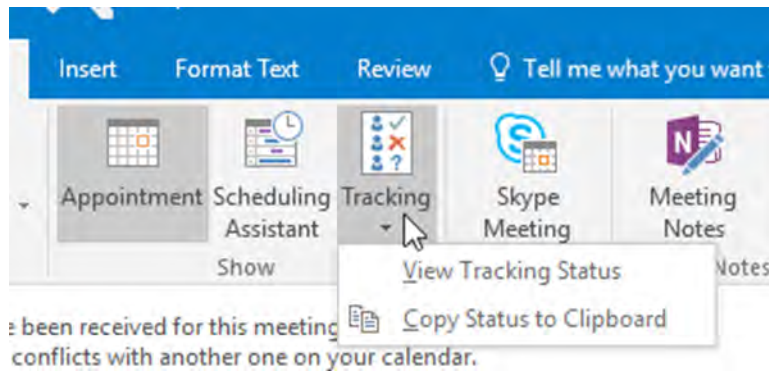
Figure 152 – See free and busy time

1. See who is invited
2. See if they are free/busy
3. Conflicts will be listed – along with time slots that do not conflict
4. Change the time and date of the meeting
5. When happy click Send

## 14.11 TRACKING MEETING RESPONSES

You have just invited 10 people to a meeting. They will all respond at different times. Now it gets to a couple of days before the meeting and you are getting prepared. First thing you want to know is who said they were coming and who said they were not. Instead of trawling through your inbox to find the responses you can track the responses in the Calendar.

### 14.11.1 TRACK MEETING BUTTON

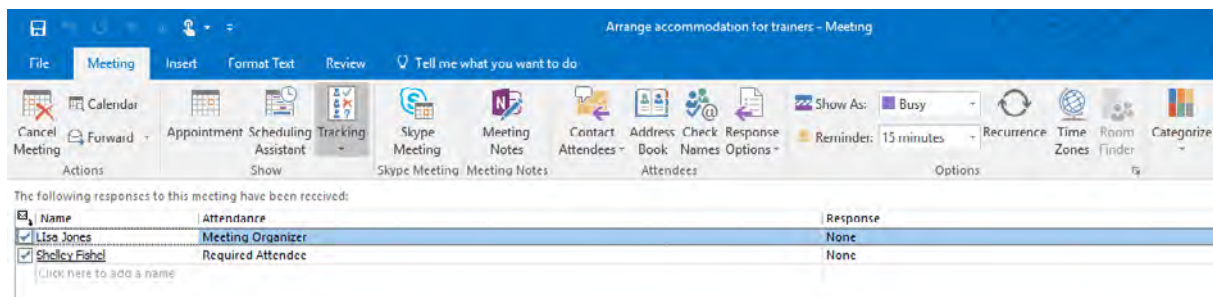


**Figure 153** – Track the meeting responses

- Double click on the meeting in the Calendar
- Click the Tracking Button

The meeting organiser is the only person who can see the tracking icon and the tracking status.

### 14.11.2 SEE RESPONSES



**Figure 154** – See who is coming

Here you can see who said what and you can contact the attendees if you need to send them something about the meeting.

When you are done click the Appointment button and it will close the tracking view.

# 15 CONTACTS – PEOPLE

## 15.1 CONTACTS ARE NOW CALLED PEOPLE

The People module of Outlook 2016 is where information about the contacts we interact with can be stored. Here you can keep information about individuals or companies such as their name and address details and communication methods such as telephone numbers, email address and Instant Messenger aliases.

Contact groups give you the ability to create a group of connected contacts with whom you can communicate easily all at once.

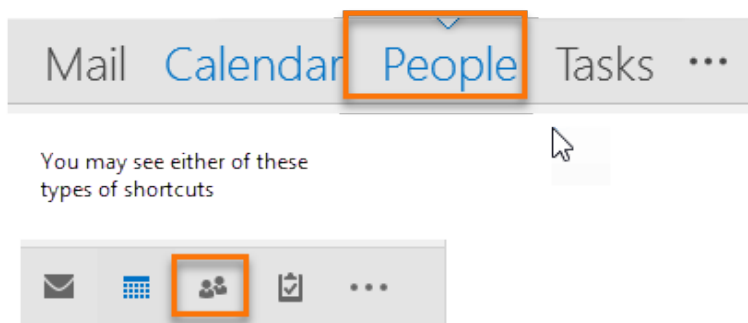
Those people with whom you communicate on a regular basis can be added to Favourites so that their details are available from everywhere within Outlook 2016.

Contact records are held in address books. You can create as many address book folders as you need. One for each type of contact if you so wish.

## 15.2 VIEW CONTACTS

Navigate to the People section to view the contacts in your address book.

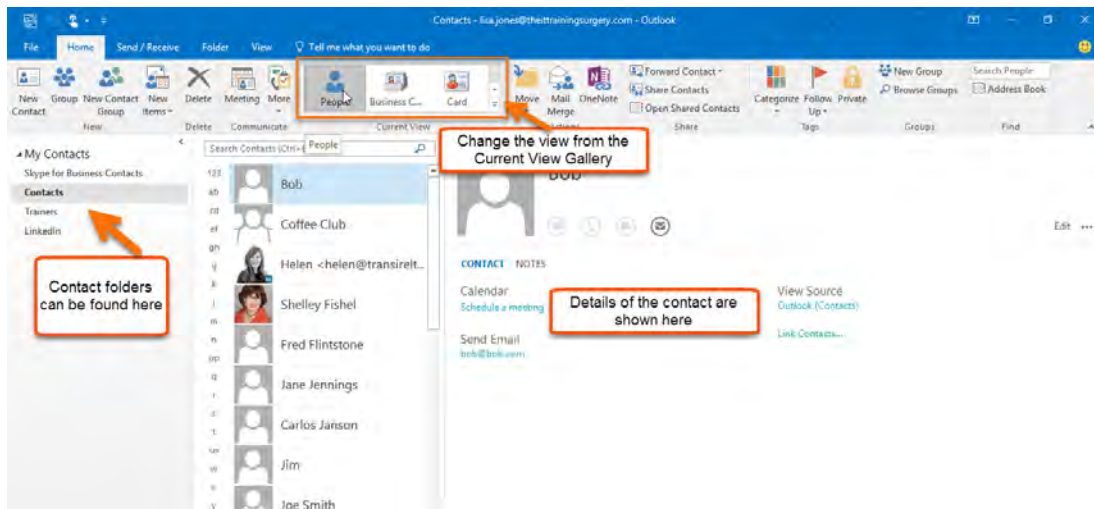
### 15.2.1 PEOPLE



**Figure 155** – The people module

Click the People shortcut to get to the Contacts area.

### 15.2.2 THE CONTACTS OR PEOPLE MODULE



**Figure 156** – See your contacts

Once in People as it is now called, you will see any address books that you have set up in the navigation pane on the left. By default there is one folder called Contacts which is the folder that Outlook sets up.

Contact records can be viewed in different ways to facilitate working with them.

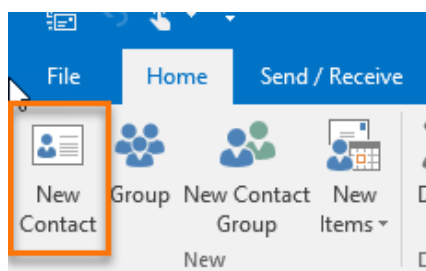
Cynthia | AXA Graduate

**AXA Global Graduate Program**  
Find out more and apply

redefining / standards AXA

## 15.3 CREATE A CONTACT

### 15.3.1 CREATE NEW



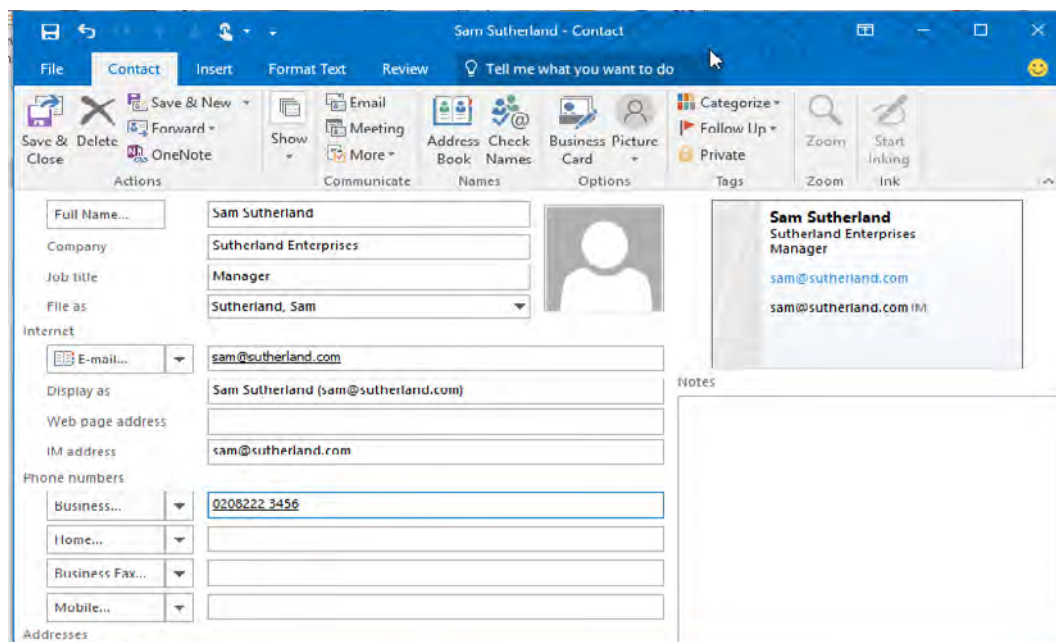
**Figure 157** – Create a new contact

On the Home Ribbon in the New group click on New Contact.

Press Control + N to create a new contact with the keyboard when you are in the People module.

When you are anywhere else within Outlook – press Control+Shift+C to create a new contact record.

### 15.3.2 FILL IN CONTACT DETAILS



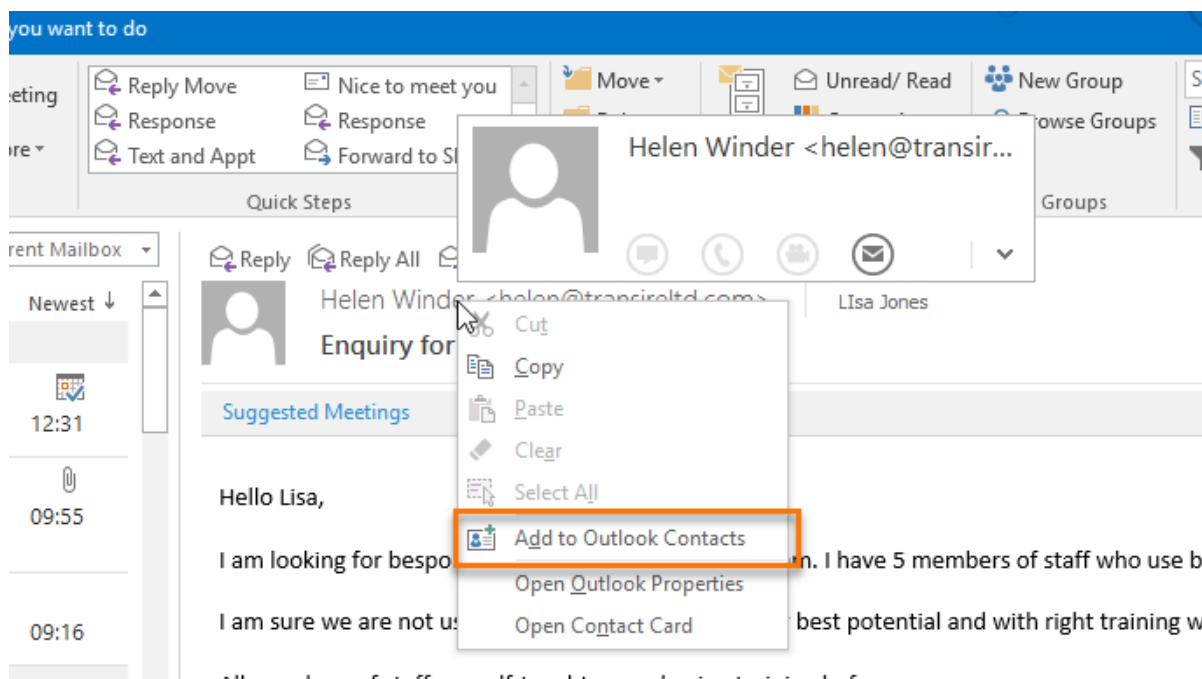
**Figure 158** – Complete the details

1. Complete the fields in the new contact record.
2. Click Save and Close when done.

## 15.4 ADD CONTACT DETAILS DIRECT FROM INCOMING EMAIL

When you receive an email from a contact, you may want to see their contact details. If they are not in your address book already, you can add them directly from the email header.

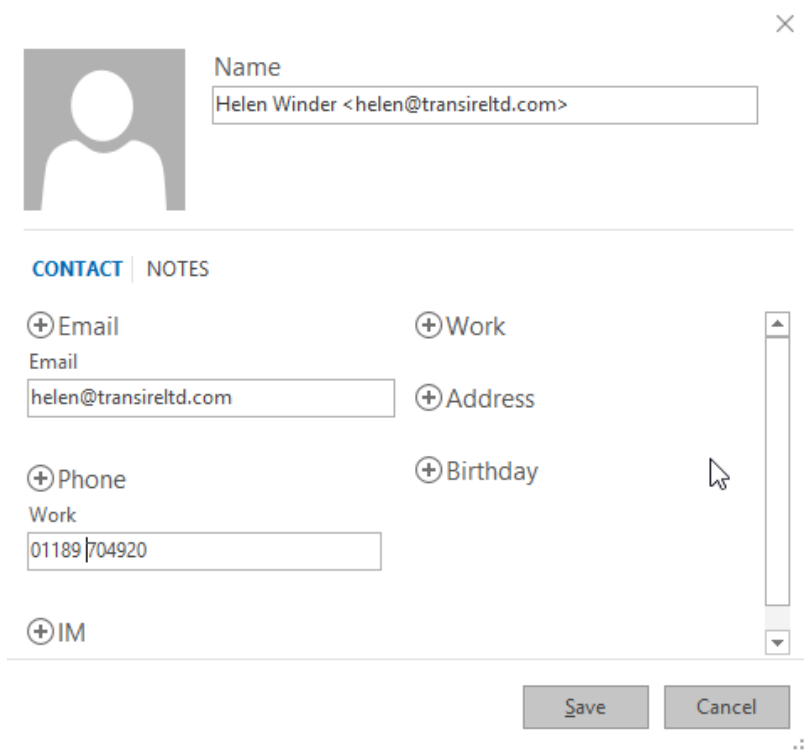
### 15.4.1 RIGHT CLICK TO ADD



**Figure 159** – add to contacts from email

To add details directly to Outlook Contacts

1. Right click on the header of the email
2. Select Add to Outlook Contacts

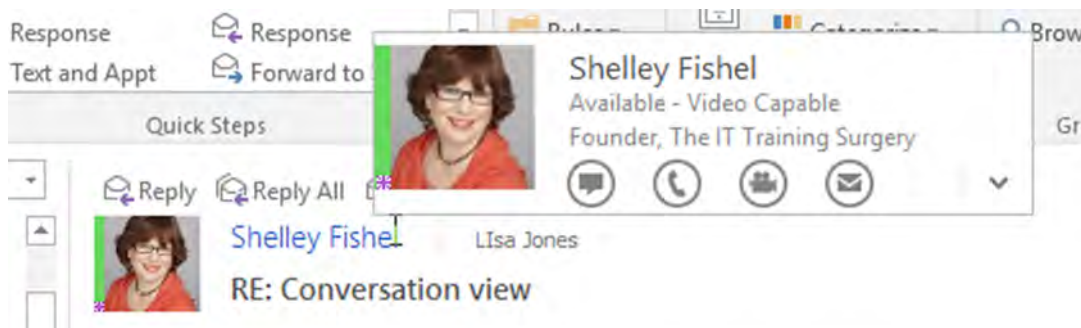


**Figure 160** – Complete the contact card

1. Email details are already completed
2. Add a telephone number – click the plus to expand and select Work, Home, Mobile
3. Complete the rest of the address details expanding the plus signs to add more information as needed
4. Click Save when done.

### 15.5 COMMUNICATION OPTIONS IN THE MESSAGE HEADER

You can communicate in different ways with your contacts via the message header.



**Figure 161** – Communicate direct from an email header

When you have Skype for Business installed and running you can use its features to communicate with your contacts. Or you can simply send an email.

1. Start an instant message using Skype for Business
2. Call the contact via Skype for Business – if this is a contact out side of your organisation you may need to get your IT team to enable this.
3. Start a video meeting with your contact
4. Email the contact

## 15.6 FAVOURITE PEOPLE AND PEEK

Add those people who you communicate with all the time to Favourite People – this will enable you to peek at them whenever you hover over the icon. You can also dock the Favourite People pane at the right of the inbox.

### 15.6.1 ADD TO FAVOURITES

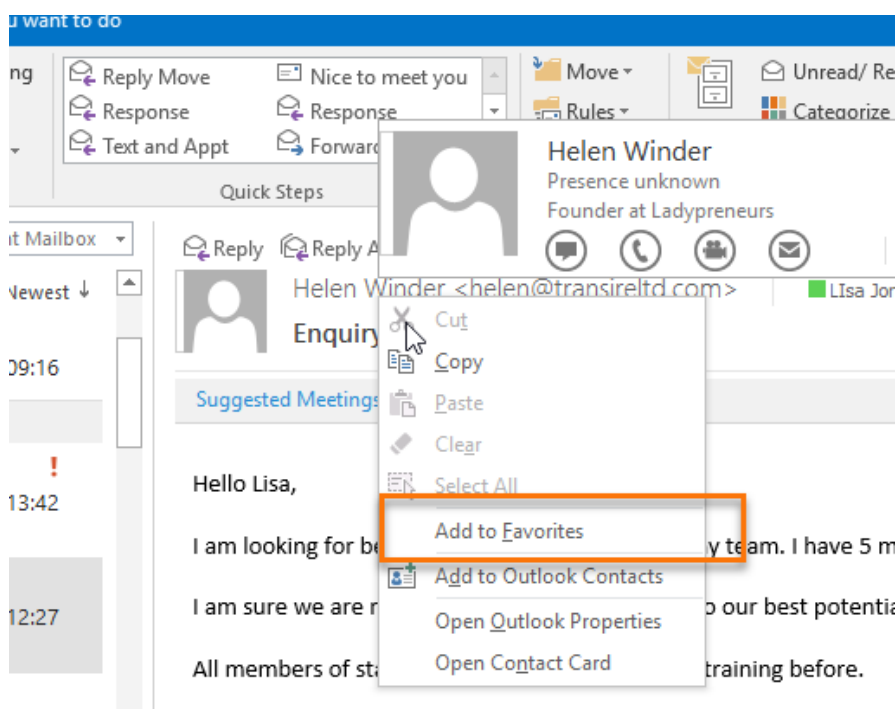


Figure 162 – Add favourite people

Right click on the email address in the message header and select Add to Favourites.

### 15.6.2 SEARCH AND ADD TO FAVOURITES

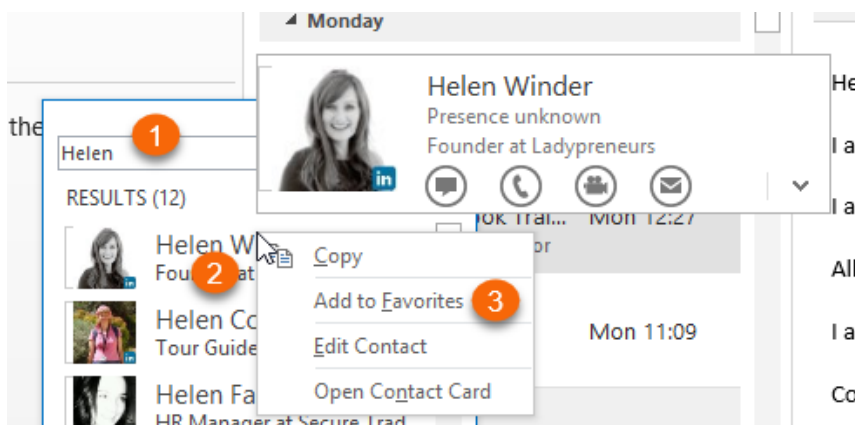


Figure 163 – Find a contact and add to favourites

1. Hover over the People shortcut
2. Type the name of the contact to search for in the Search Box
3. Right click and select Add to Favourites

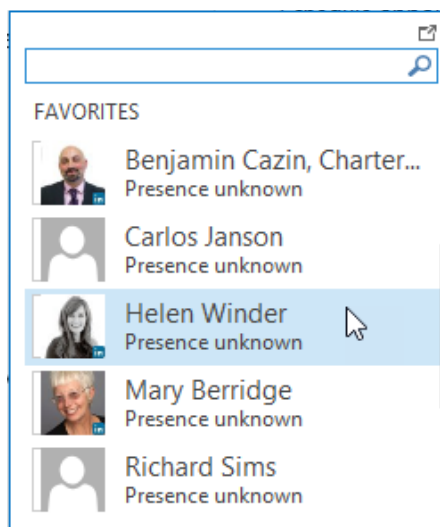


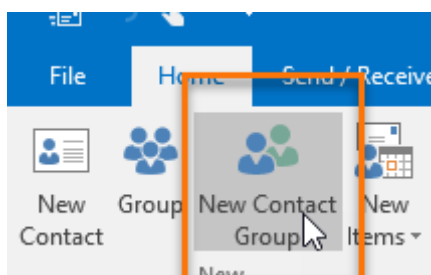
Figure 164 – New favourite added

## 15.7 CREATE A CONTACT GROUP

If you find yourself writing to a particular group of the same people all the time, you can create a contact group. Perhaps you are a member of a particular committee at work, or you organise your kids football team either way you can create a Contact Group for that purpose.

In the past a Contact Group was referred to as a Distribution List.

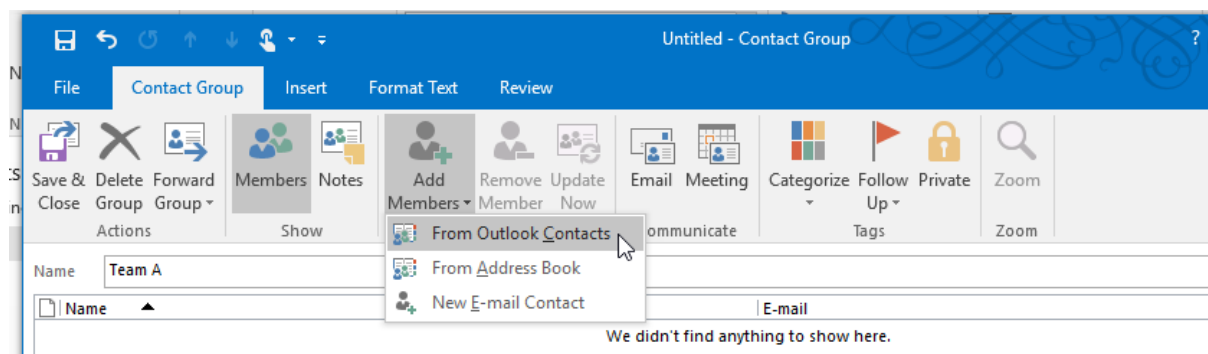
### 15.7.1 CREATE CONTACT GROUP



**Figure 165** – Create a contact group

In the New Group on the Home Ribbon click on New Contact Group.

### 15.7.2 NAME THE GROUP AND CHOOSE WHERE CONTACTS COME FROM



**Figure 166** – Choose where the contacts came from

1. Type a Name for the contact group
2. Click Add Members and choose where the members are coming from

**From Outlook Contacts** – select contacts from the default address book.

**From Address Book** – this is your Global Address List – all those who work in your organisation.

**New Email Contact** – if the contact is not in Outlook Contacts or the Global Address List you can type their address in here.

### 15.7.3 SELECT THE CONTACTS TO ADD

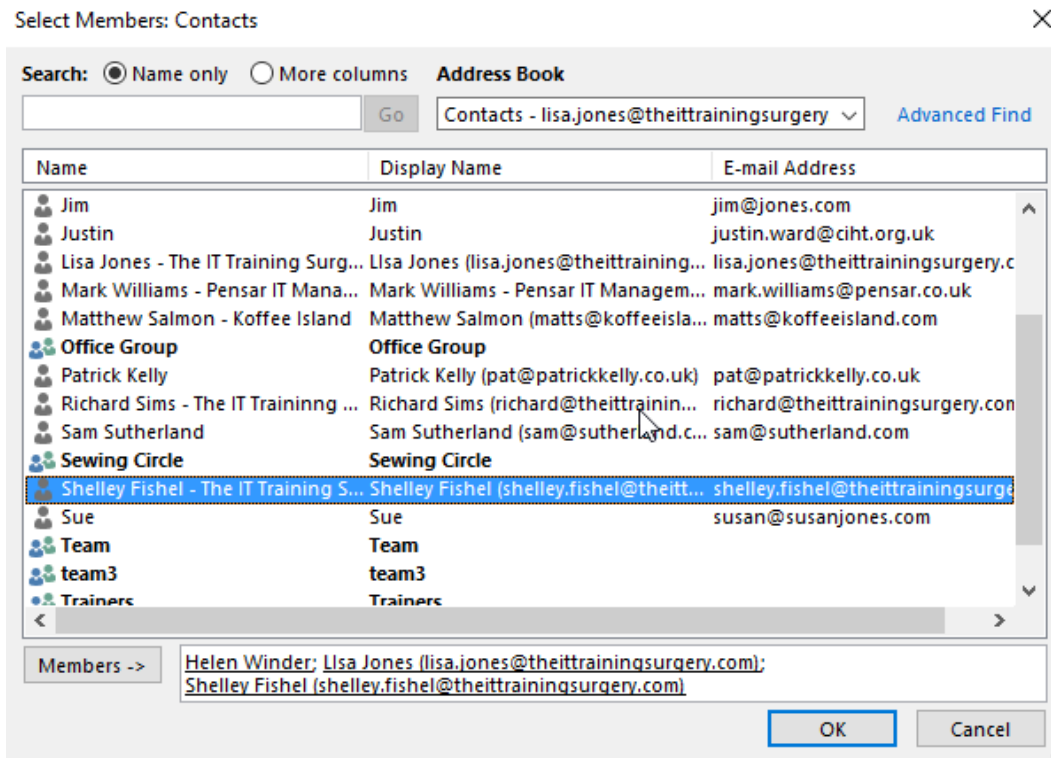


Figure 167 – Choose group members

3. Double click on each contact to add and make sure they appear in the Members area
4. Click OK when done

### 13.7.4 SEE THE GROUP MEMBERS

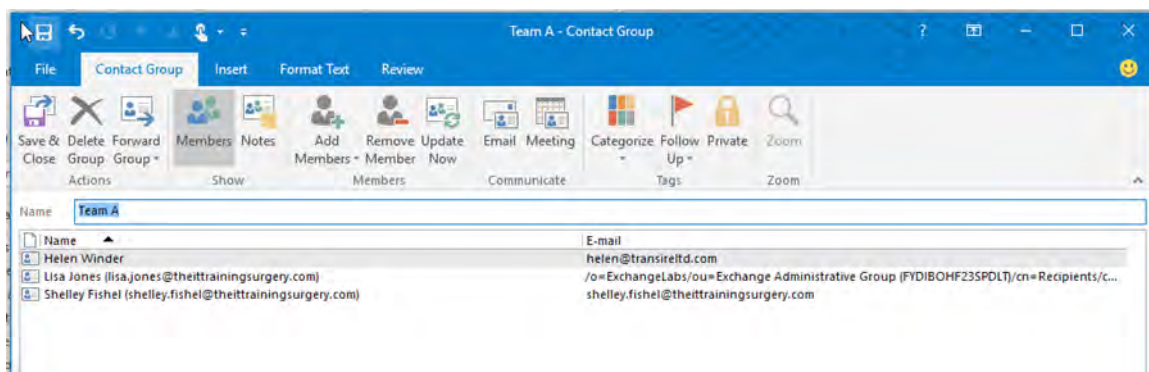


Figure 168 – See the list of members

5. When you are finished adding members click Save & Close to get back to Contacts.

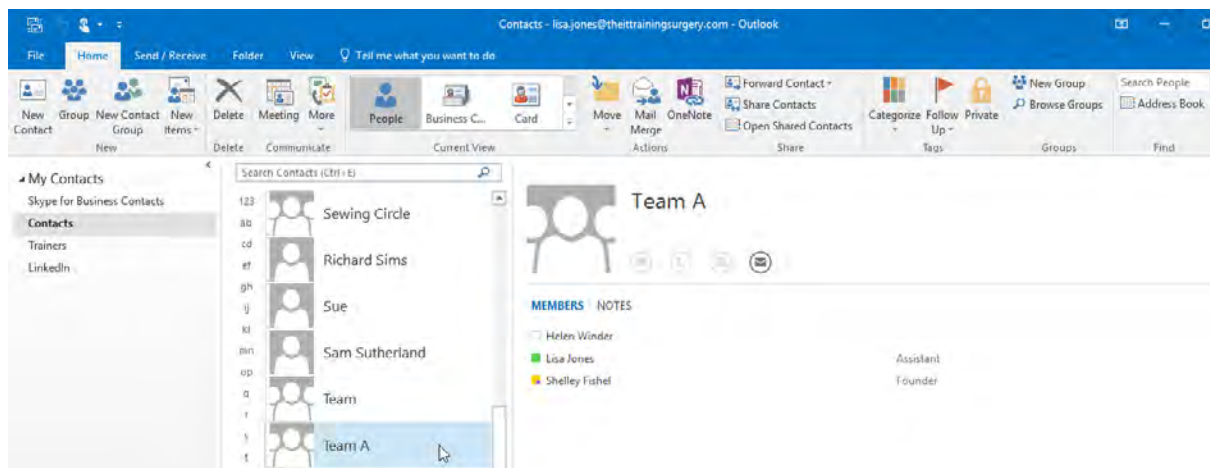


Figure 169 – See the contact group card

The new Contact Group is now in the contact list.

## 15.8 EMAIL A CONTACT GROUP

When you want to email the people on your list there are a few ways to do so.

### 15.8.1 ADDRESS AND EMAIL

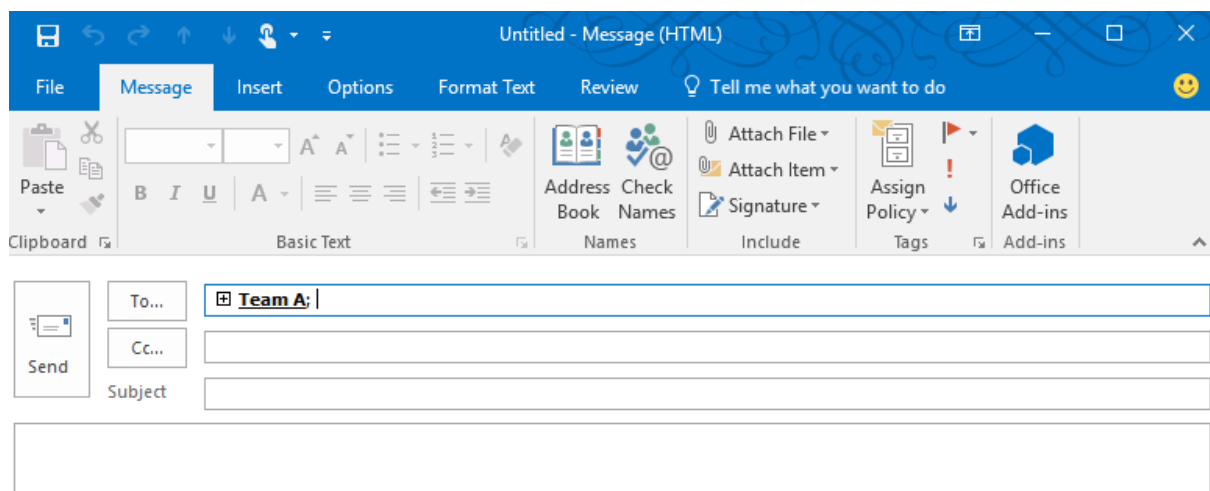


Figure 170 – Email the contact group

1. In a new email, type the name of your Contact Group – Outlook will pick it up
2. Click on it to add

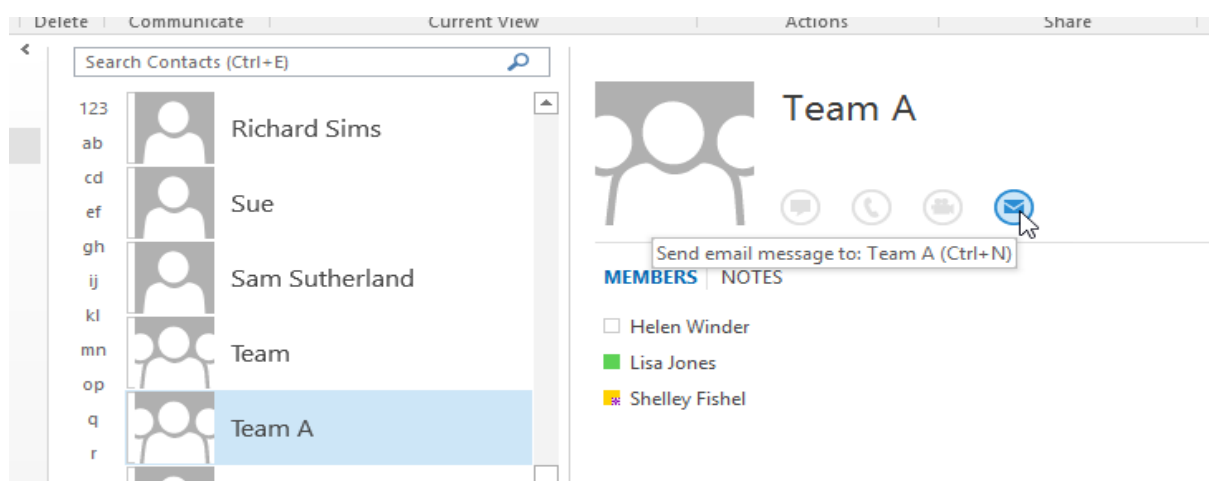
The group is added with a + sign – this allows you to expand the group and see the members email addresses individually.

If you do expand the group you cannot collapse them again.

### **Will the members of this contact group be able to see all email addresses of all members?**

Yes they will. If you don't want them to see everyone's email, put the group in the BCC field and address the email to yourself.

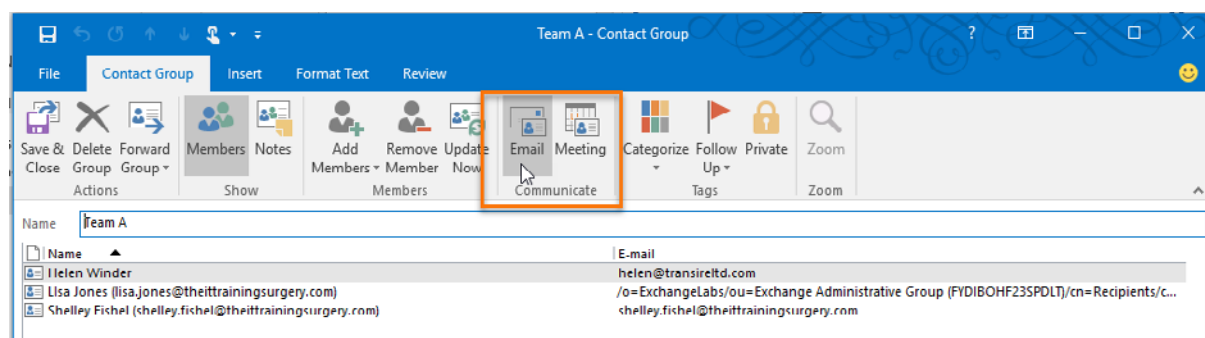
## **15.8.2 EMAIL FROM THE CONTACT FOLDER**



**Figure 171** – Send email from the contact folder

1. Click on the Contact Group to select it
2. Click on the email icon in the header of the group

### 15.8.3 EMAIL CONTACT GROUP FROM ITS RECORD



**Figure 172** – Send email from the contact group record

1. Open the Contact Group record
2. Click Email from the Communicate Group on the ribbon

## 15.9 ORGANISE CONTACTS IN FOLDERS

Contact cards are stored in address books which are folders within Outlook. Outlook creates a default Contacts folder called Contacts. You can create more folders for specific categories or types of contact.

# TURN TO THE EXPERTS FOR SUBSCRIBE CONSULTANCY

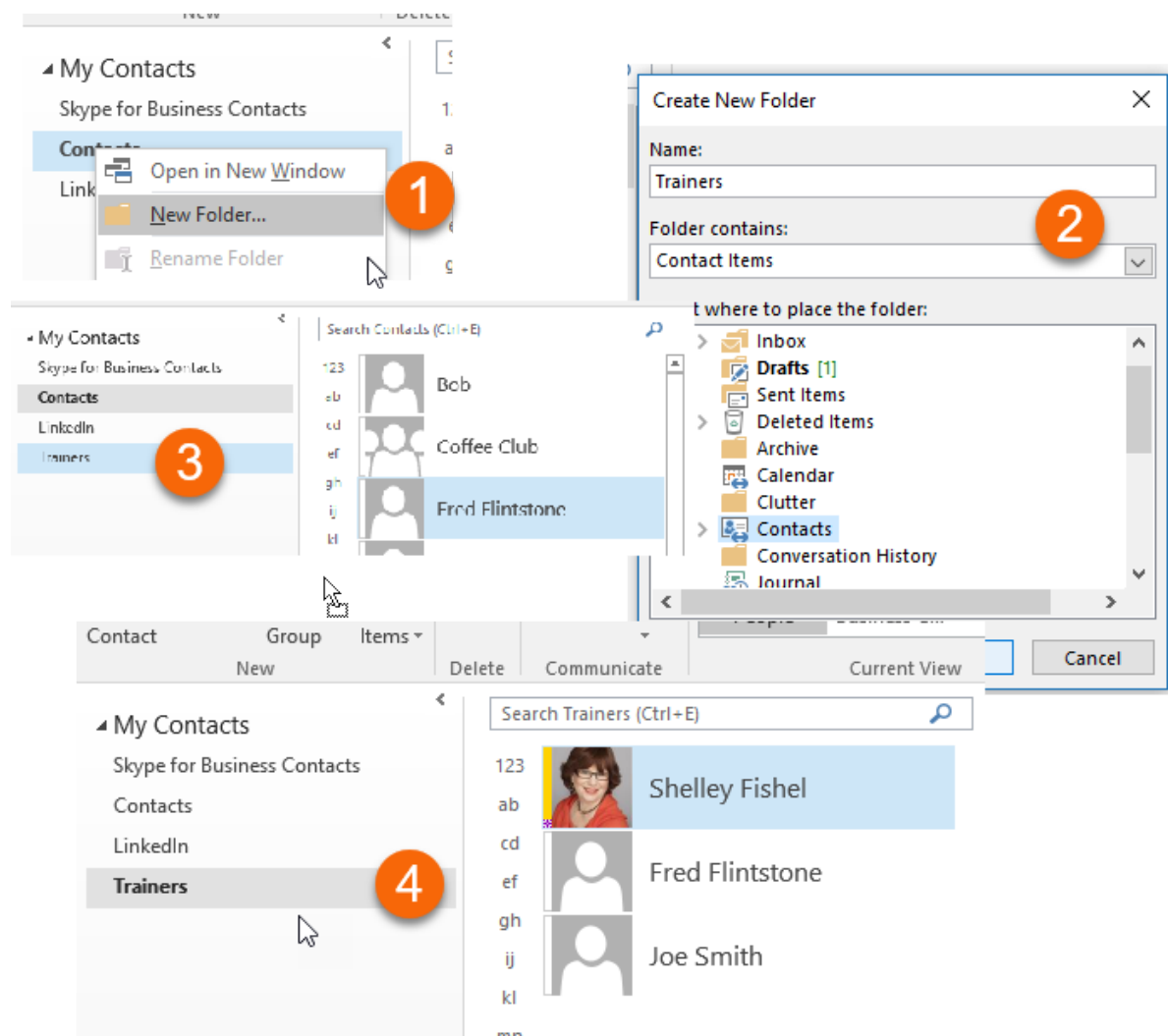
Subscribe is one of the leading companies in Europe when it comes to innovation and business development within subscription businesses.

We innovate new subscription business models or improve existing ones. We do business reviews of existing subscription businesses and we develop acquisition and retention strategies.

Learn more at [linkedin.com/company/subscribe](https://www.linkedin.com/company/subscribe) or contact Managing Director Morten Suhr Hansen at [mha@subscribe.dk](mailto:mha@subscribe.dk)

**SUBSCRIBE** - to the future

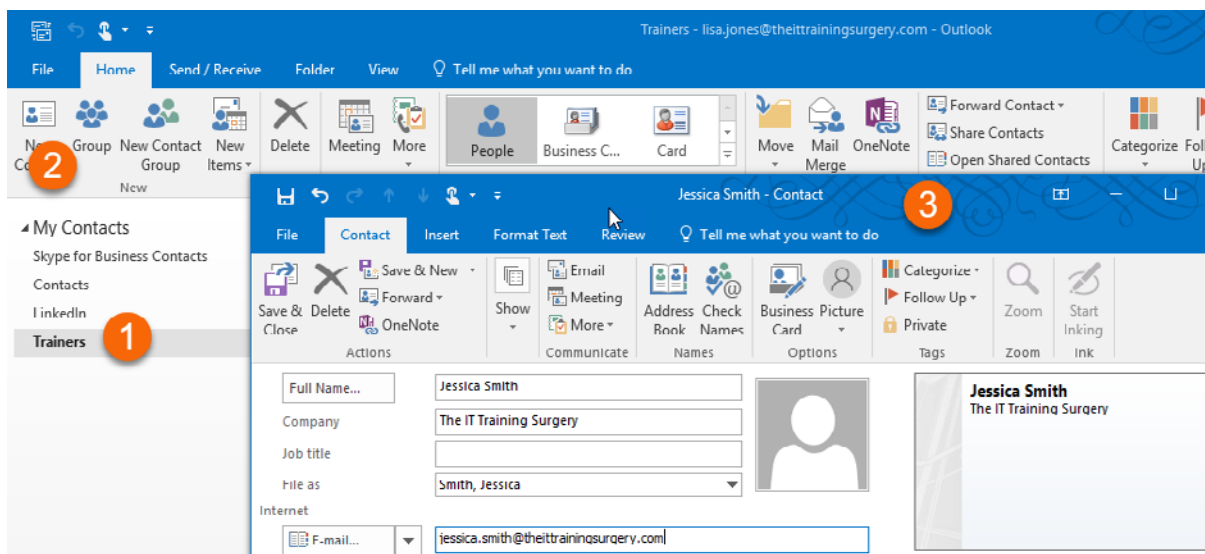
### 15.9.1 CREATE A NEW CONTACT FOLDER



**Figure 173** – Create new contact folder and place contacts inside

1. Right click the Contacts folder and select New Folder
2. Name the folder and make sure it holds Contact Items
3. Drag contacts to the new folder to Move them
4. Hold down Control as you drag to Copy

### 15.9.2 CREATE CONTACT IN NEW FOLDER



**Figure 174** – Create a new contact in the new folder

1. Click on the folder in the Navigation Pane
2. Click New Contact
3. Proceed as before

# 16 TASKS AND TO DO

## 16.1 TO DO

When entering the Task Module there are two items listed in the Navigation Pane. One is the to-do list and one is the task list. So what is the difference between the two?

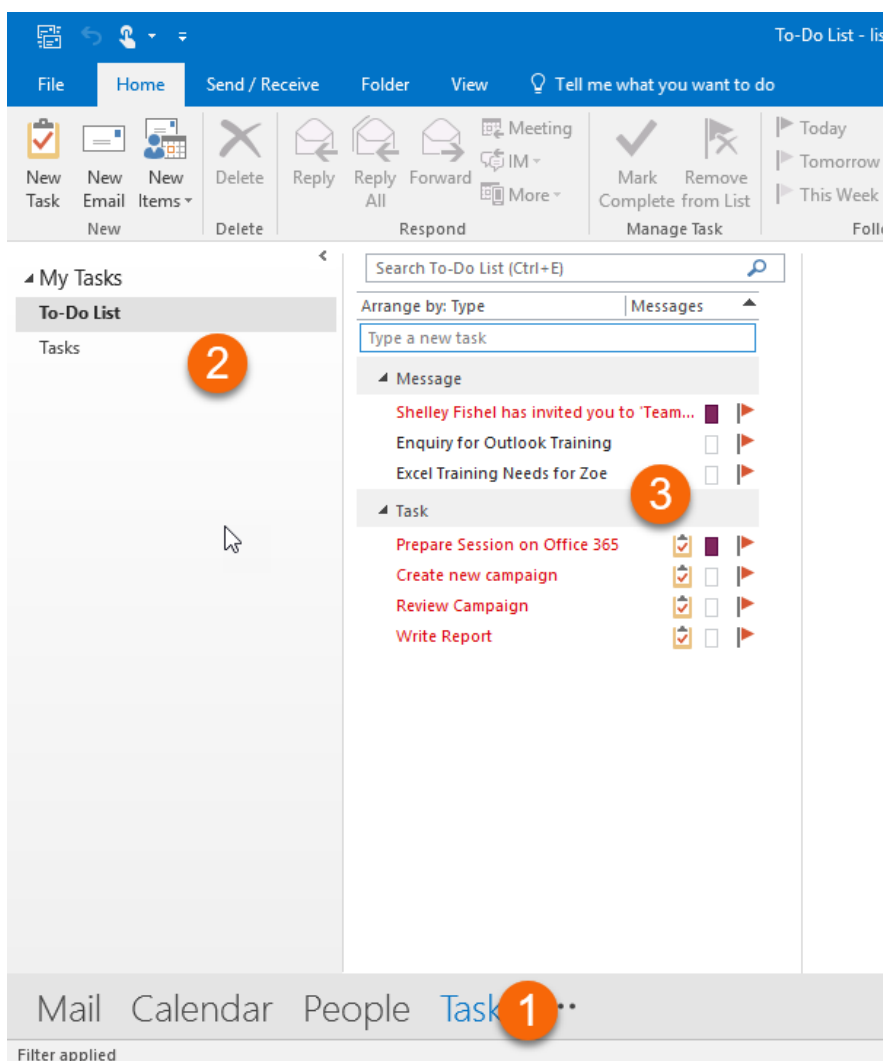
**To-do list** – this is a master list which includes all tasks that have been created as tasks and also any item that has been flagged.

**Task List** – this includes only tasks and will not show any flagged items.

The To-Do-List is in fact a search folder that includes all flagged items and tasks and is always up to date.

Outlook creates the To-Do list from any flagged email so you can't create it yourself!

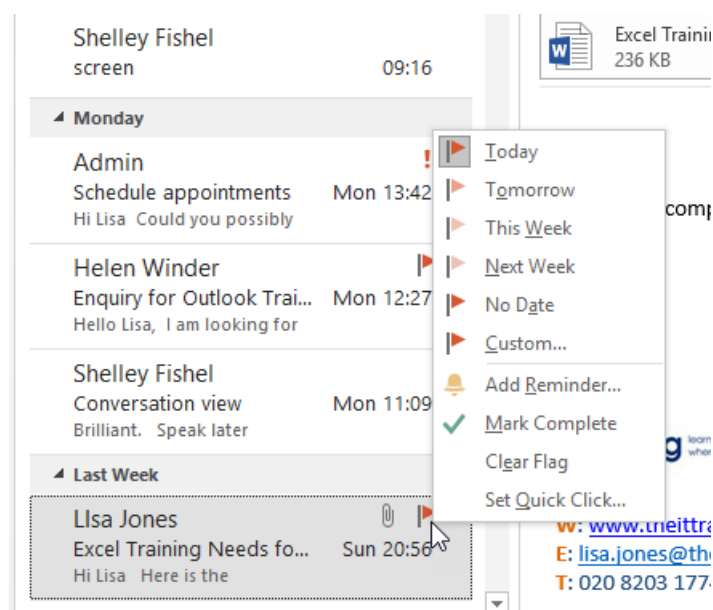
### 16.1.1 THE TO-DO LIST



**Figure 175** – The to-do list

1. Click on Tasks at the bottom of the Navigation Pane
2. Click To-Do List
3. See a list of all the flagged items plus any tasks that you have created

### 16.1.2 FLAG AN ITEM TO ADD TO THE TO-DO LIST



**Figure 176** – Flag an item

Right click over the little red flag and choose the time scale you need. Or just click on the red flag to add a generic flag. Flags that have a date attached can be shown on your calendar on the due date – handy for keeping track.

When you flag an item and/or set a reminder, it is added to the To-Do list.

Here it is!

## 16.2 TASKS

New tasks can be created in several ways.

- Click New Task in the Task Module
- Type in the Click here to add new task row at the top of the To-Do list.
- Drag a calendar appointment on to the Task shortcut
- Drag an email onto the Task shortcut

### 16.2.1 NEW TASK

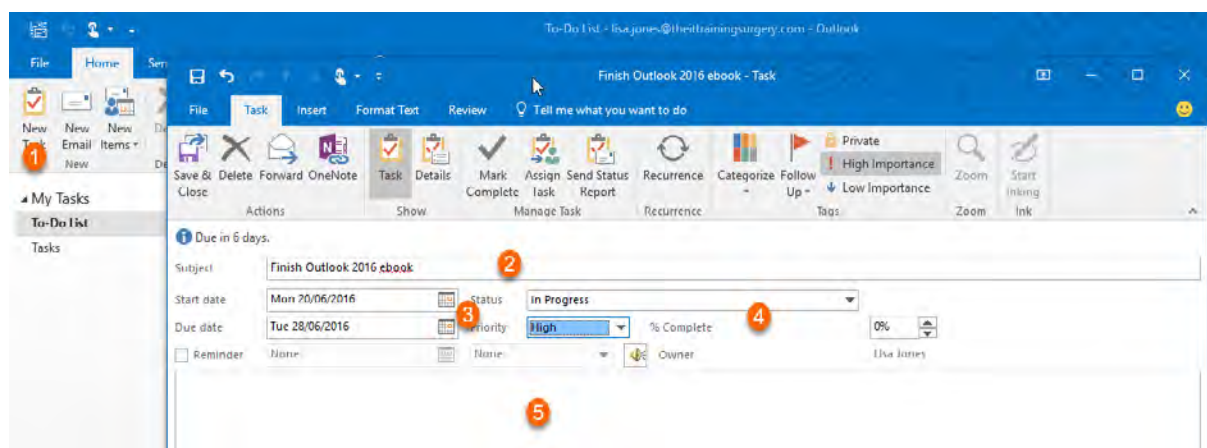


Figure 177 – Create a new task

In the Tasks module click on New Task (1) then name the task (2) and complete a start and due date (if you have them) (3) add in Status, Priority and tick the box if you want a reminder (4).

Type any notes about the task in the big white box (5).

### 16.2.2 DETAILS VIEW

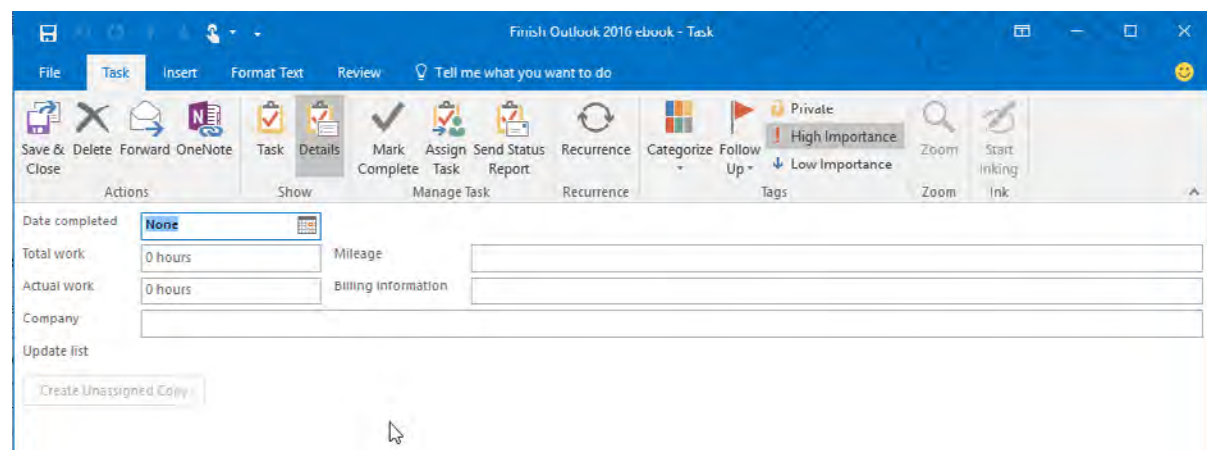


Figure 178 – See more details

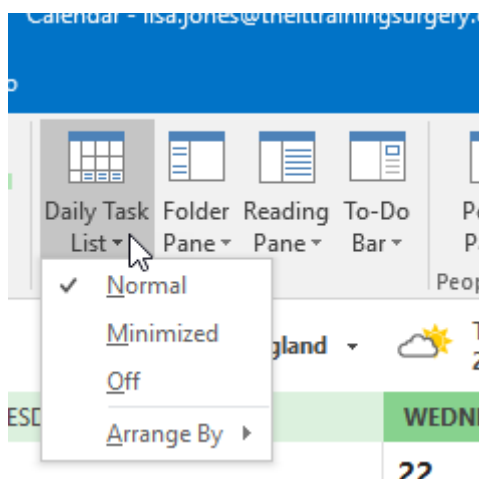
Here you can add more information – if you travel this is a good place to note mileage.

## 16.3 SHOW TASKS ON THEIR DUE DATE ON THE CALENDAR

### 16.3.1 DISPLAY THE DAILY TASK LIST

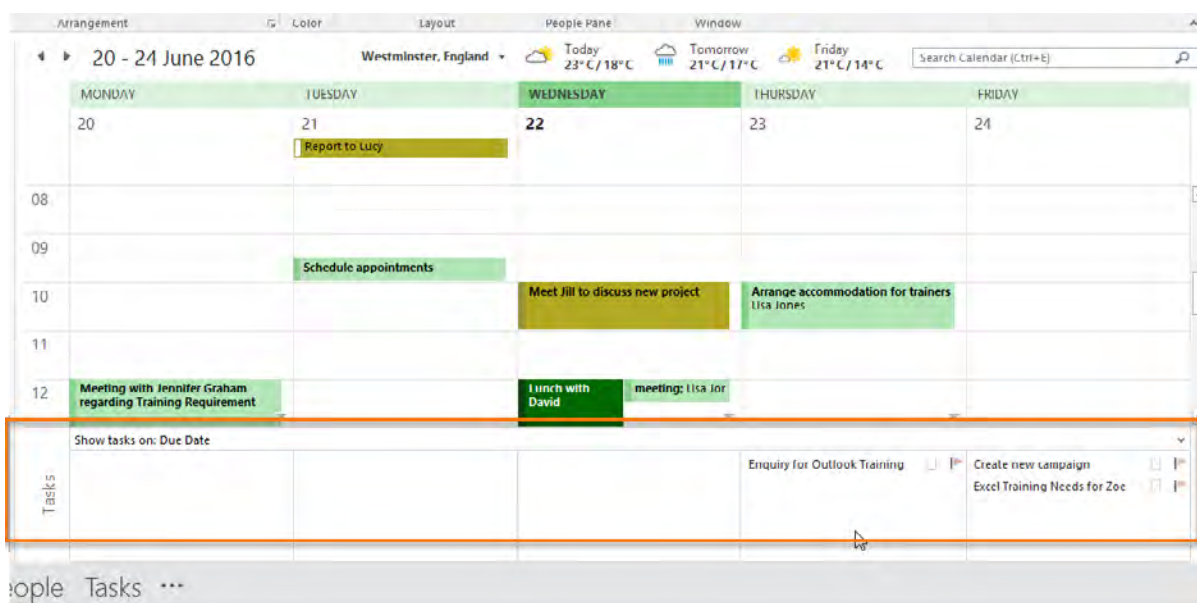
On the View Ribbon.

Click the Daily Task List – choose whether it is minimised or Normal.



**Figure 179** – Display the daily task list on the calendar

The tasks now appear at the bottom of the calendar on the due date. You can keep track of what you are meant to be doing this way.

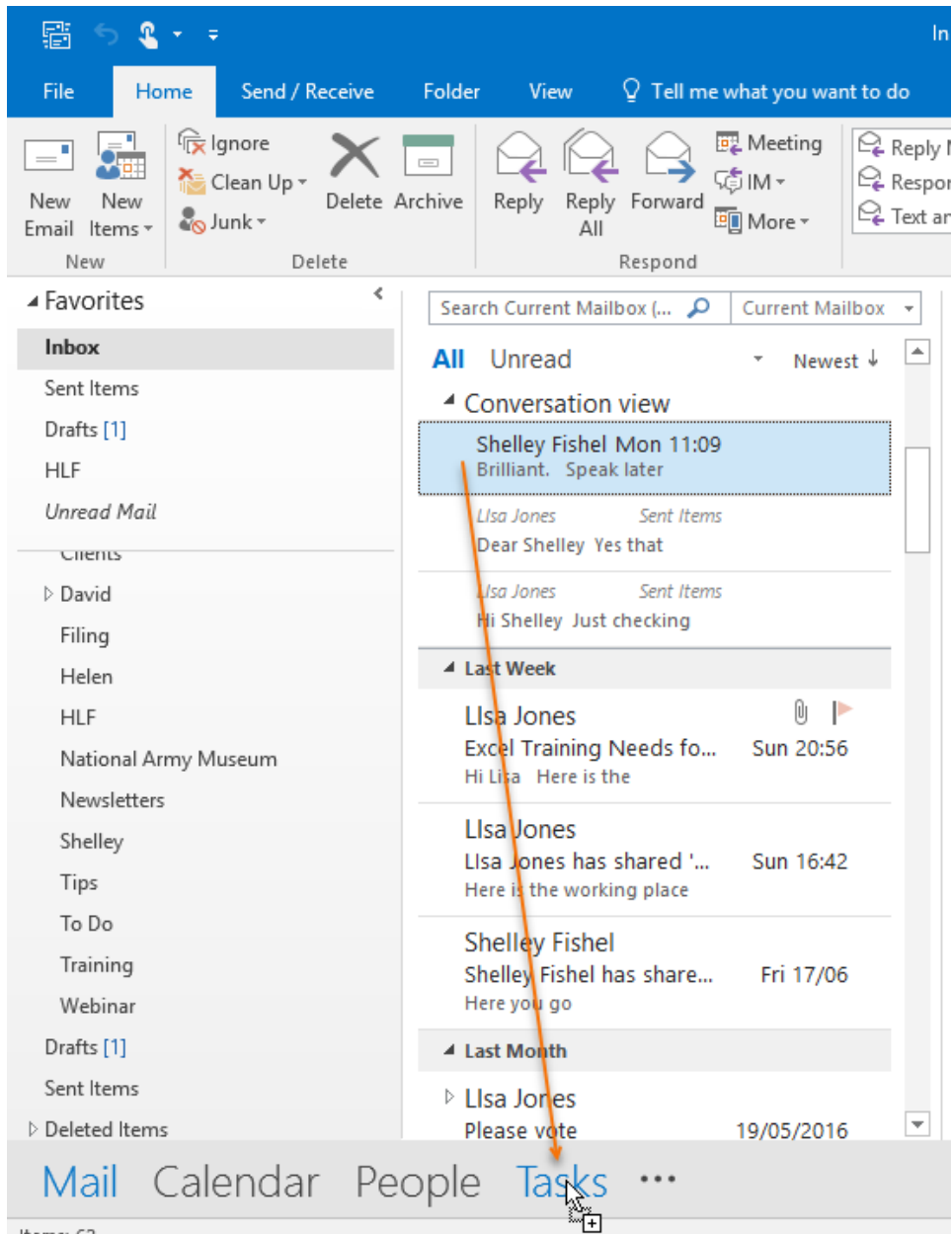


**Figure 180** – Daily task list appears below calendar

## 16.4 CREATE A TASK FROM AN EMAIL

You just received an email from a colleague or your boss asking you to take action on a project. Rather than create a task from scratch you can drag the email onto the Task Icon to create a new task which includes all the relevant information.

### 16.4.1 DRAG TO THE TASK ICON



**Figure 181** – Drag an email to task icon

Drag the email and drop it on the Tasks shortcut.

### 16.4.2 NEW TASK CREATED

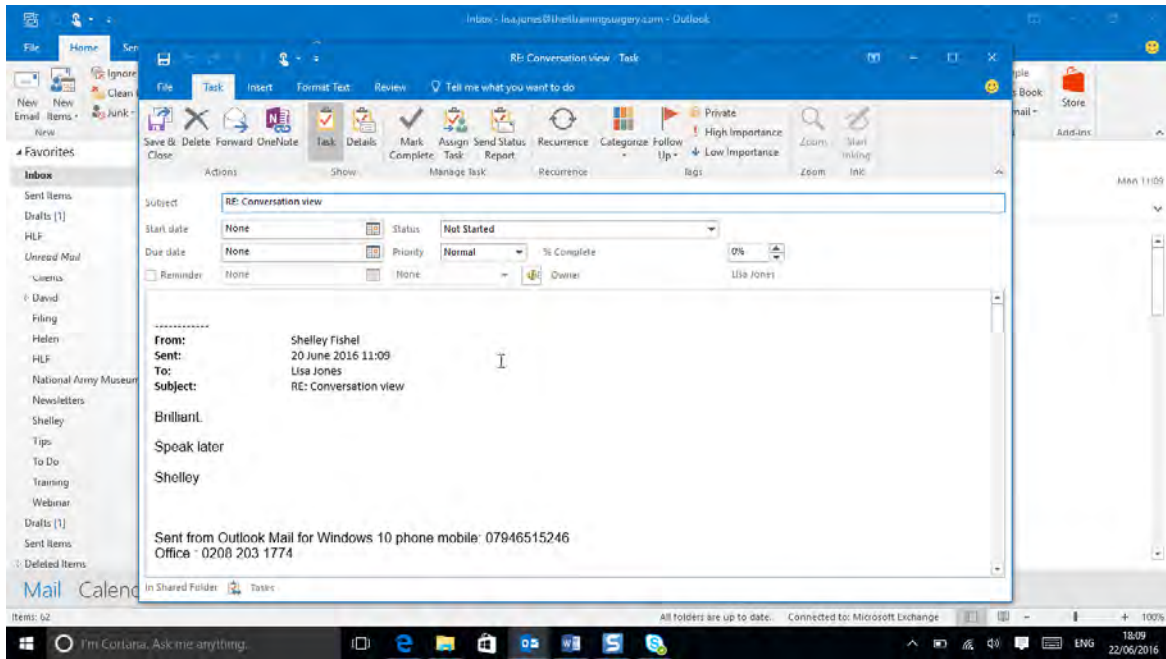


Figure 182 – New task is created

A new task is created with the subject from the email. All you need to do is fill in the start/ due date and any more details.

### 16.4.3 TASK APPEARS IN TO DO LIST

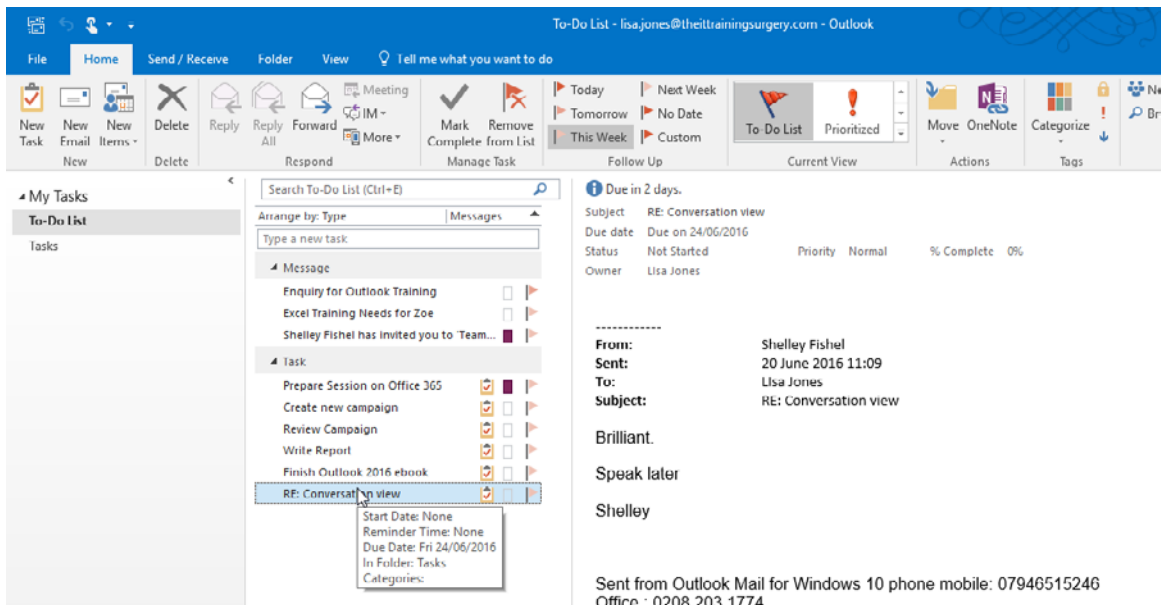
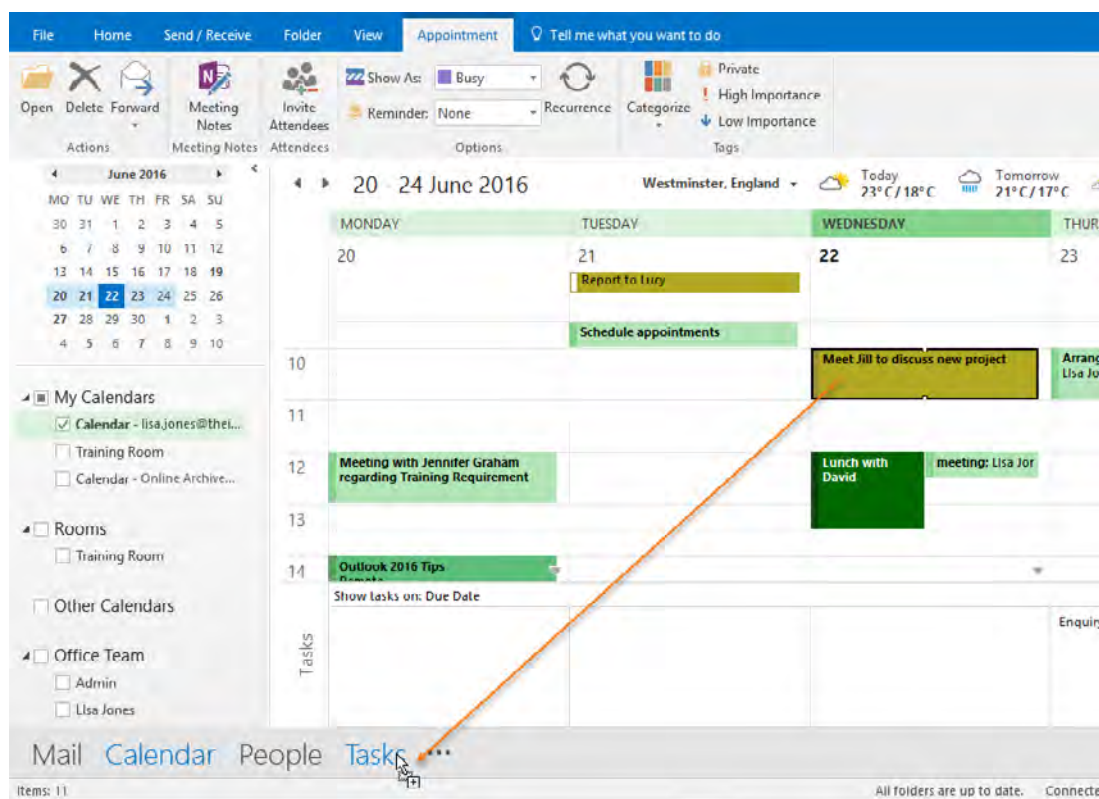


Figure 183 – Task appears on the to do list

The new task appears on the To-Do list flagged for Due Date.

## 16.5 CREATE A TASK FROM AN APPOINTMENT

Drag a calendar appointment to the Tasks Icon and when you let go a new task will be created.



**Figure 184** – Drag an appointment on to the task icon

Complete the fields for start/due date and status, set a reminder if you want one and click Save and Close.

The new task will appear in the task list and the to do list as before.

# 17 MAIL MERGE

## 17.1 MAIL MERGE

Outlook 2016 uses the Microsoft Word 2016 mail merge engine to produce mail merged emails. You can start a Mail Merge from within Microsoft Word 2016 or from Microsoft Outlook 2016.

Here are the steps to send one personalised email to many of your Outlook Contacts.

### 17.1.1 SELECT THE CONTACTS

Click on each Contact to include in the merge – if they are next to each other, hold down the Shift key. If they are not next to each other, hold down the Control key as you click. You can also select a whole folder if all of the people you need are in their own contact folder.

## Losing track of your leads?

**Bookboon leads the way**

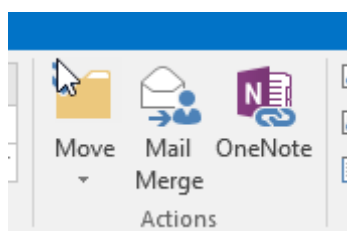
Get help to increase the lead generation on your own website. Ask the experts.

bookboon.com

Interested in how we can help you?  
email [ban@bookboon.com](mailto:ban@bookboon.com)

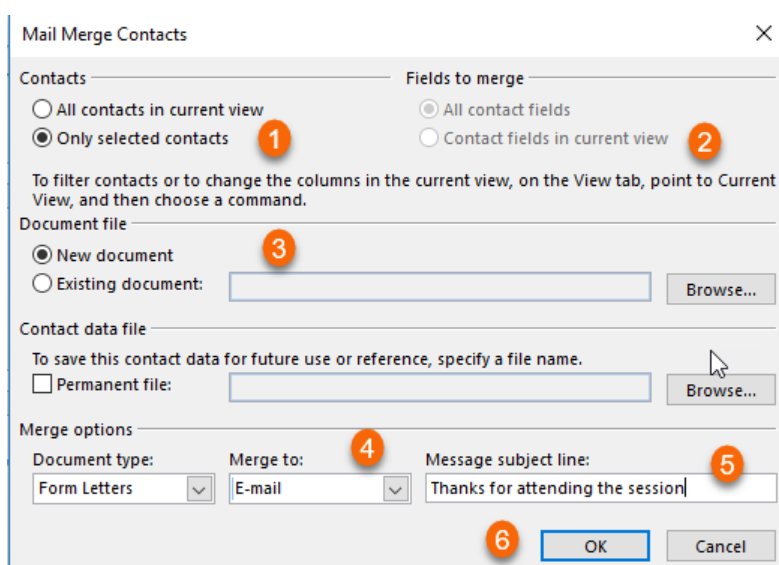


### 17.1.2 CLICK MAIL MERGE



**Figure 185** – Start the merge

Click Mail Merge on the main Home Ribbon.



**Figure 186** – Set up the merge

1. Select whether to use all contacts in the current view or only the selected contacts
2. Choose which fields to include – this allows you to pick individual fields to personalise the messages
3. Decide if you are creating a brand new message or using an existing document
4. Choose E-mail in Merge to – this tells Outlook that you are creating an email rather than a document
5. Type a subject line for the message
6. Click OK

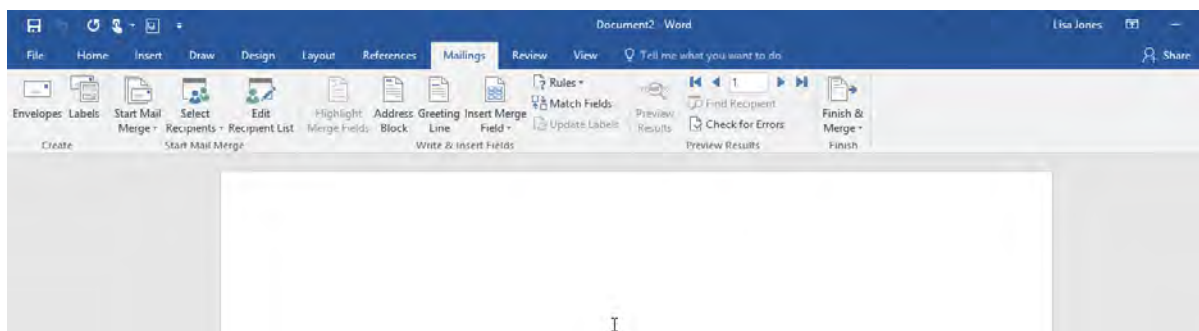
### 17.1.3 OUTLOOK NOW INITIALISES WORD

Outlook now opens up Microsoft Word which is where you will create the message and complete the merge process.

## 17.2 CREATE THE MESSAGE

Now that you are in Word, you will see the Mail Merge Ribbon with the options to complete the merge process.

### 17.2.1 WORD MAIL MERGE RIBBON

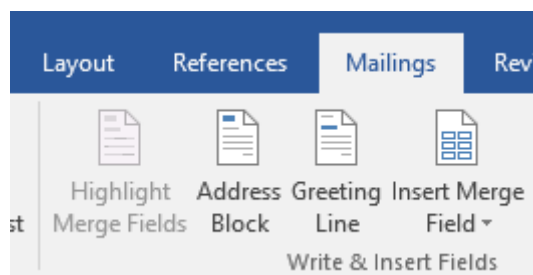


**Figure 187** – Create the message in Word

The steps for a Mail Merge follow the direction of the Ribbon and move from left to right.

You have already set the subject line, and selected the recipients (you did that in Outlook), now you need to address the message to each individual and add any text. Then you can check how it will look before completing the merge.

### 17.2.2 MAIL MERGE FIELDS



**Figure 188** – Add mail merge fields

**Address Block** – this inserts a whole finished Address Block – not necessary when sending an email merge.

**Greeting Line** – you can choose from a selection of pre-set greeting lines.

**Insert Merge Field** – this option gives you the greatest flexibility when building a personalised email or letter. You can pick exactly which field you want to use.

### 17.2.3 INSERT MERGE FIELD

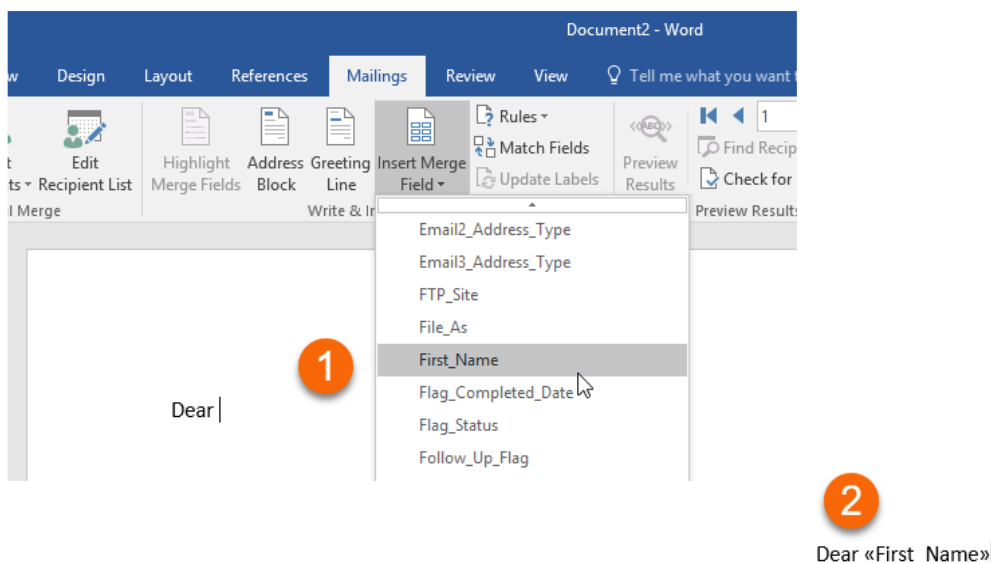


Figure 189 – Add individual fields

Type the greeting or heading you want to use and then select the field from the Insert Merge Field list – I chose First\_Name. It will look like image number (2).

### 17.2.4 PREVIEW THE RESULT

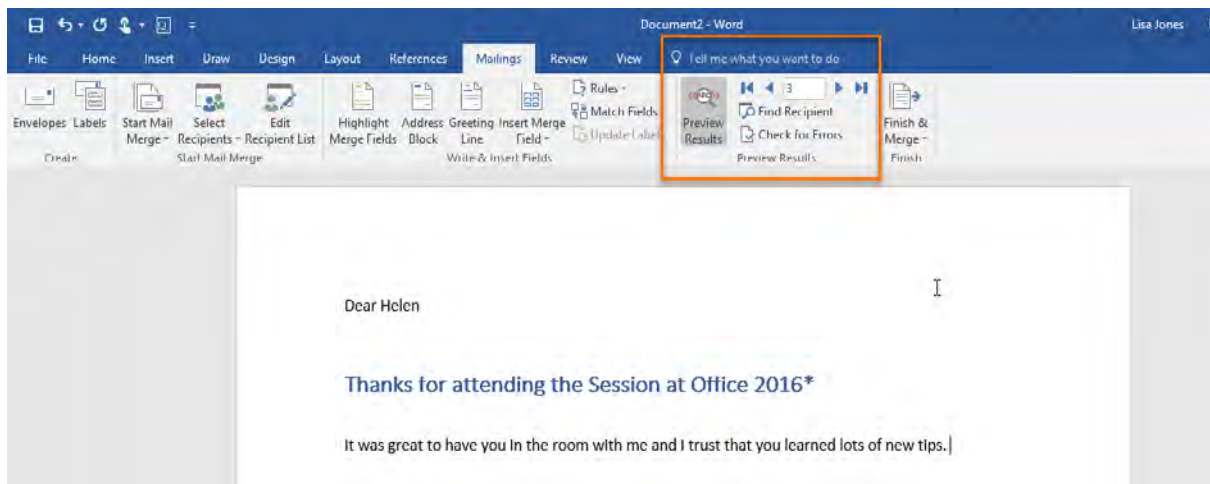


Figure 190 – See what it looks like

Click on Preview Results to see what your customised email will look like. Use the arrows to move between records so that you can check each one.

### 17.2.5 FINISH AND MERGE

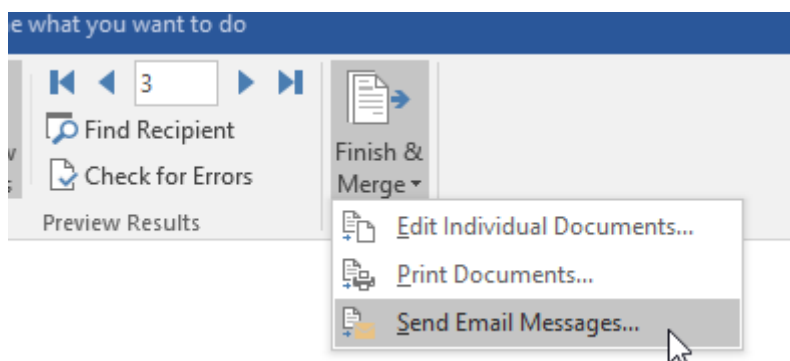


Figure 191 – Finish the merge

When you are absolutely happy with the message, click the drop down under Finish and Merge and select Send Email Messages.

### 17.2.6 CONFIRM THE MERGE

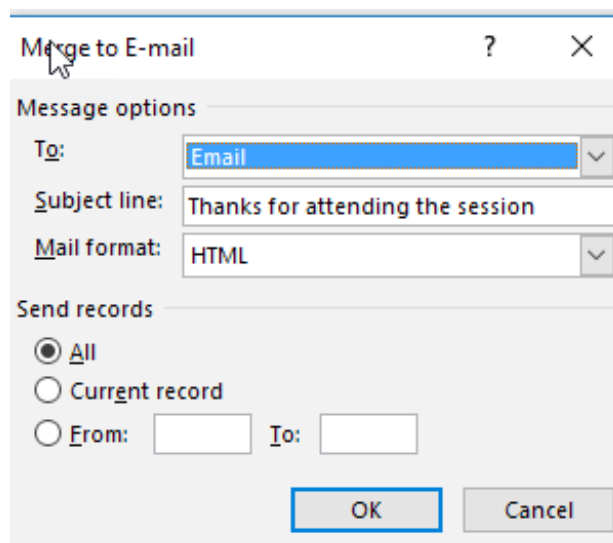
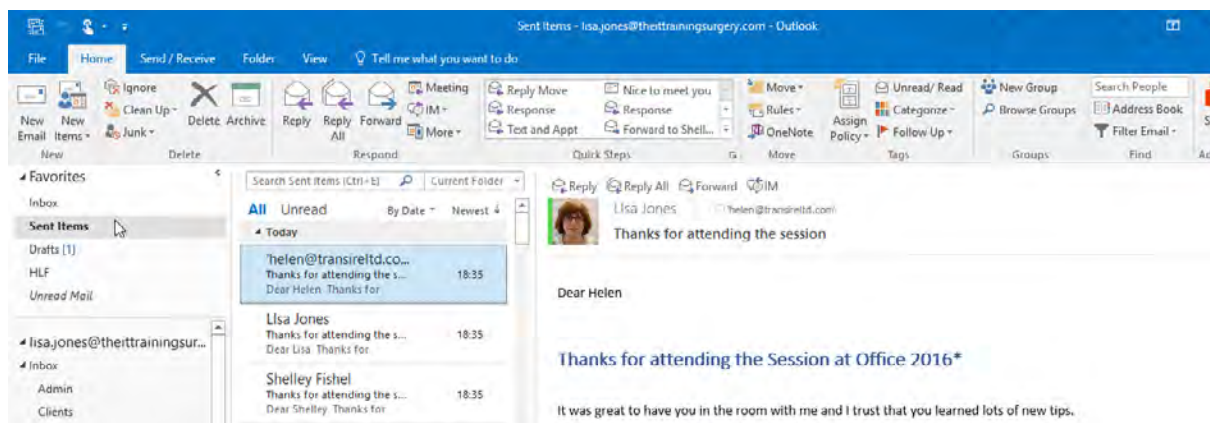


Figure 192 – Confirm you want to send

Check the dialogue box – you can change the subject line if you want to here.

Click OK to send the email merge.

### 17.2.7 SEE THE SENT MESSAGES



**Figure 193** – Merged messages appear in the sent items folder

The messages are sent immediately – to see them, go to the Sent Items folder in Outlook and there they are!

# 18 RULES

Rules are like QuickSteps only more so. You can build quite complex rules that work on email coming in or going out.

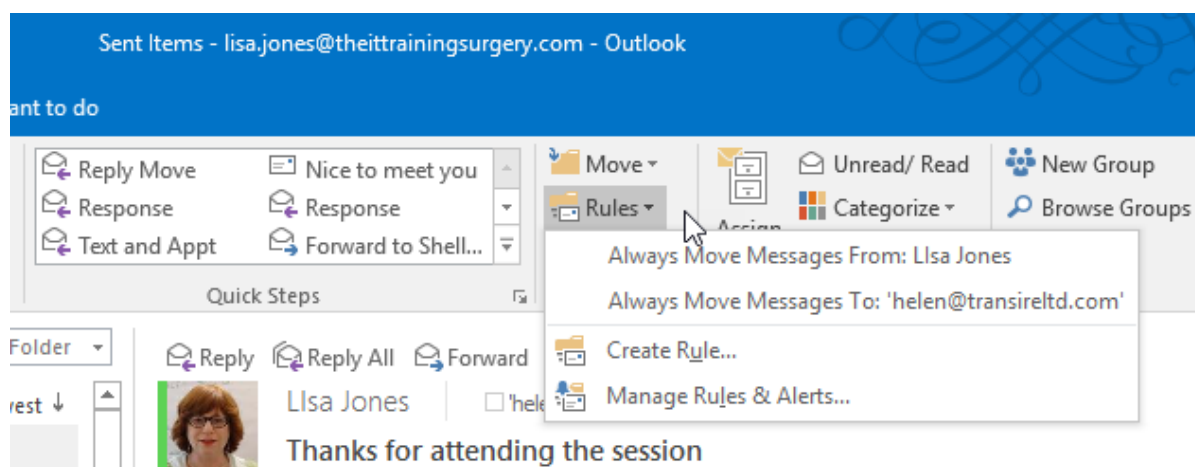
In this example we will see how to build a rule to move all Newsletters to a Newsletter Folder automatically so that you can read them at your leisure. The rule will make sure that new newsletters by pass the inbox and go directly to the Newsletter folder.

Decide what you want the rule to do – this will make it easier to create if you know the steps.

Newsletter Rule the steps:

- When a message arrives in the Inbox
- With the Word Unsubscribe somewhere in the header/footer or body
- Move it to the Newsletter Folder

## 18.1 CREATE THE RULE



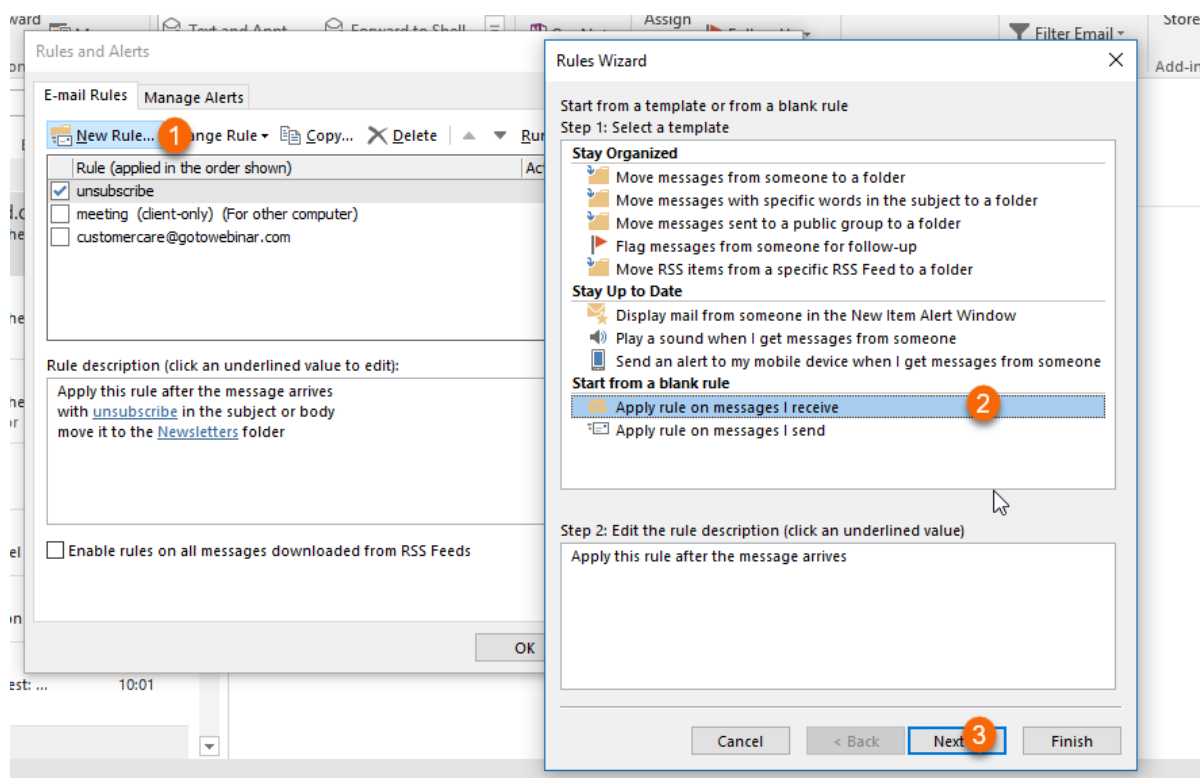
**Figure 194** – Create a rule from scratch

When you click on Rules you will be offered the choice to create a couple of quick rules.

- Always Move Messages from
- Always Move Messages to

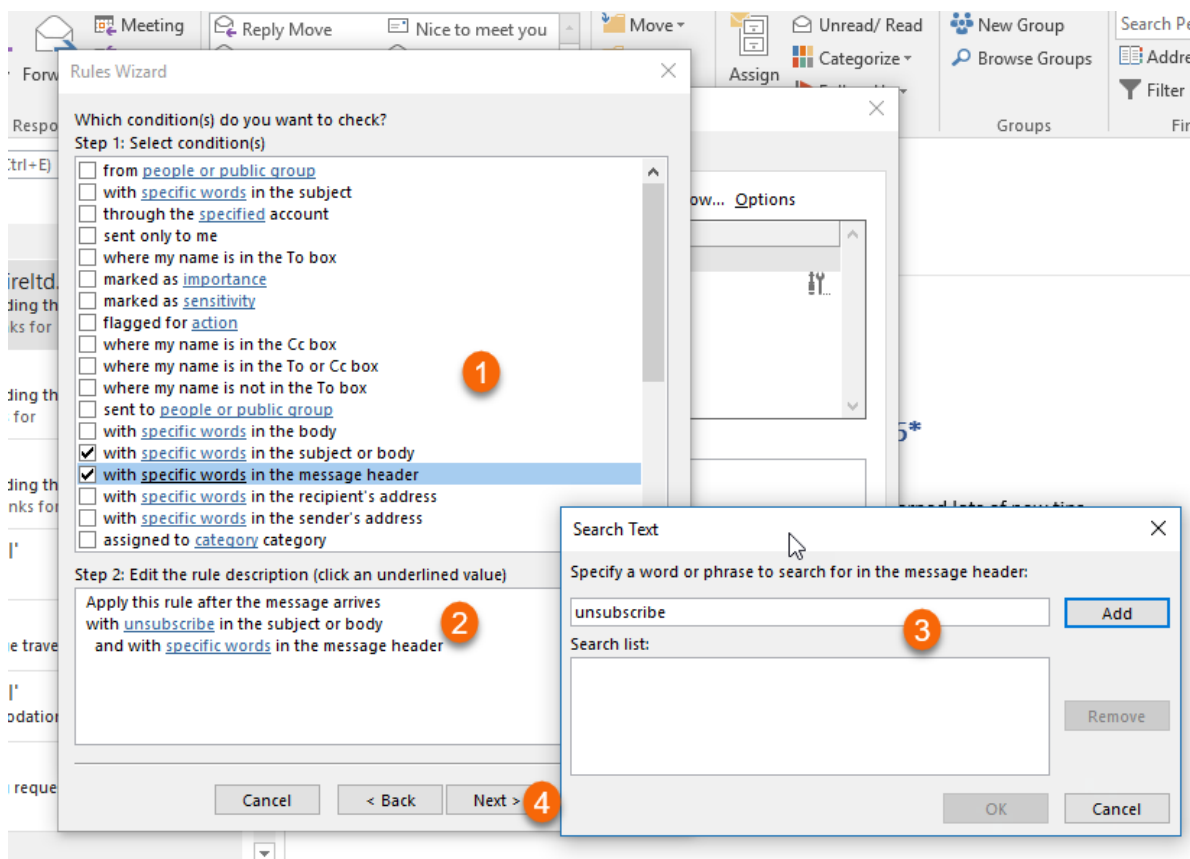
These just do exactly what they say and will apply from the minute you click on them.

I like to create rules from scratch so I will click on Manage Rules and Alerts.



**Figure 195** – New rule on messages that arrive

1. Click New Rule
2. In the dialogue box decide whether to use a templated rule or create your own and if the rule applies to messages you receive or messages you send.
3. Click Next to move on



**Figure 196** – Set up the criteria

- Tick all boxes that apply to what you wish to do – in my example I want any email that has specific words in the subject, body or message header, so I have ticked those boxes.
- Then I need to tell Outlook what the specific words are that will trigger the rule in this case the word “unsubscribe” – if the word unsubscribe appears in the subject or body and/or.
- If the word unsubscribe appears in the message header.
- Click Next to tell Outlook what to do when the conditions are met.

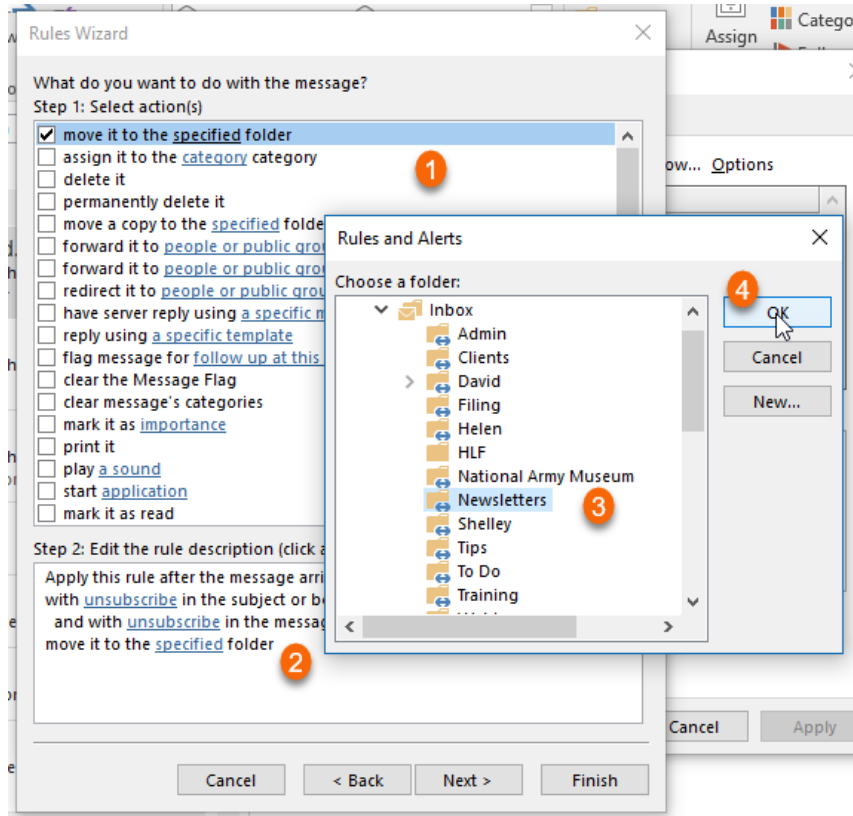


Figure 197 – Tell Outlook what to do if conditions are met

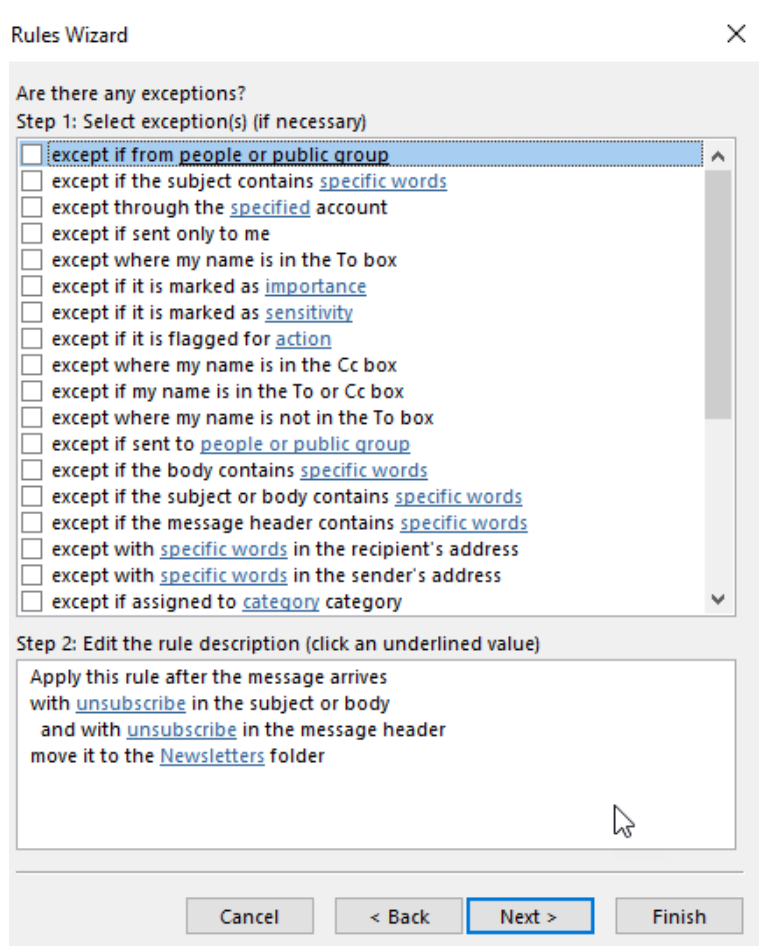
“I studied English for 16 years but...  
...I finally learned to speak it in just six lessons”  
Jane, Chinese architect

ENGLISH OUT THERE

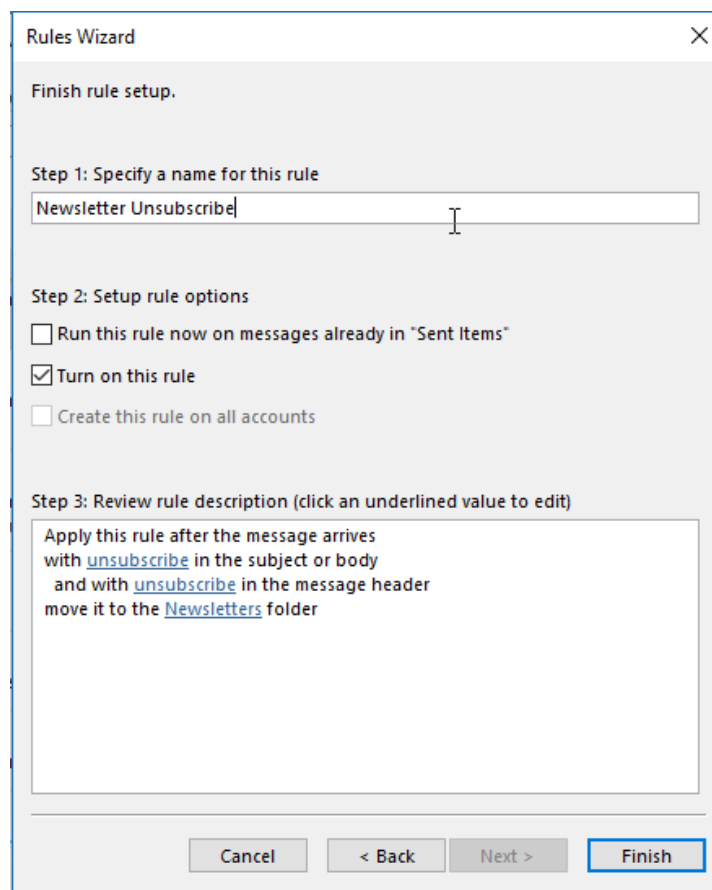
Click to hear me talking before and after my unique course download

The advertisement features a woman, Jane, a Chinese architect, smiling. To her right is a green speech bubble containing the text 'ENGLISH OUT THERE'. Below the speech bubble is a call to action: 'Click to hear me talking before and after my unique course download'. The background is a blurred image of a city street.

- Choose an action – in this example Move to the Specified folder
- Click on Specified at the bottom and then choose the folder from the folder list
- Click OK and then Next to set up any exceptions – are there any circumstances when this rule should not apply?



**Figure 198** – Set exceptions



**Figure 199** – Finish up

- Name the rule and decide whether to run it now and also whether to turn it on.
- Click Finish.

You are now done – the rule is set up and will work in the background moving any email with the word unsubscribe in it to the Newsletters folder. I can now read those newsletters at my leisure without them appearing in the main inbox at all.

# 19 GROUPS IN OUTLOOK 2016

Groups are a new feature and are part of an Office 365 subscription they came into being around the back end of 2015. A group is a mini team site. It can have its own conversations, calendar, notebook and files. Groups can be created from within Outlook 2016 on the desktop or from within Outlook on the Web and OneDrive for Business.

## 19.1 CREATE A NEW GROUP

On the home ribbon in the Groups section click new group

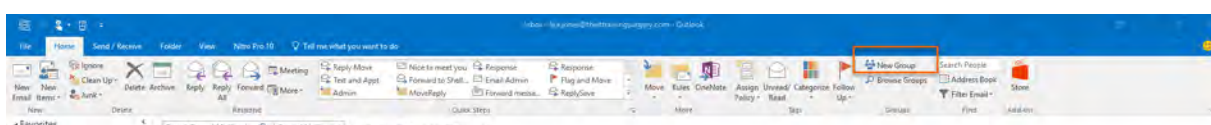


Figure 200 – The group ribbon

## 19.2 COMPLETE THE CREATE GROUP DIALOGUE BOX

Choose a name (1) The Group ID will show up and tell you if it is available (2) Decide if the group is a private group – only visible to invited members or a public group that anyone in the organisation can find and ask to join. (3) Click OK when finished (4).

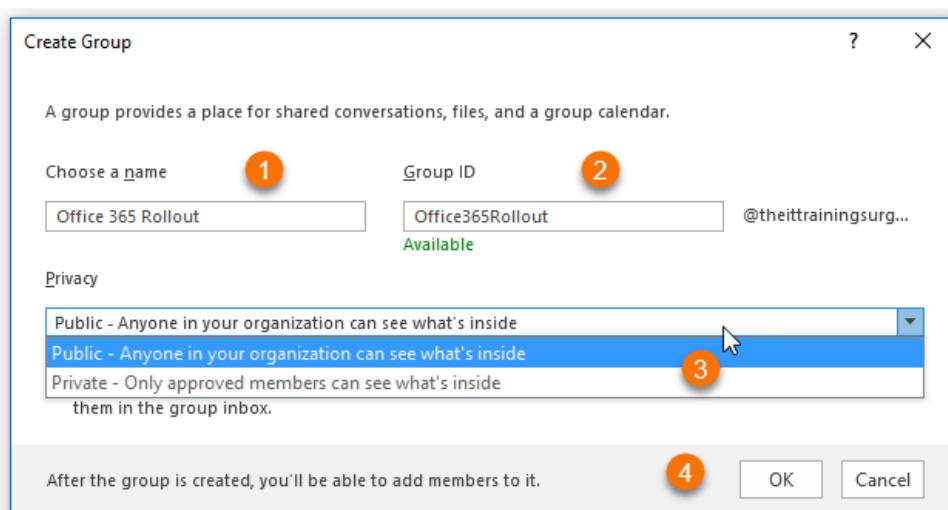


Figure 201 – New group details

## 19.3 ADD MEMBERS

Now add members to the group – start to type their name and then click on the suggested name of the person to add. Click OK when done.

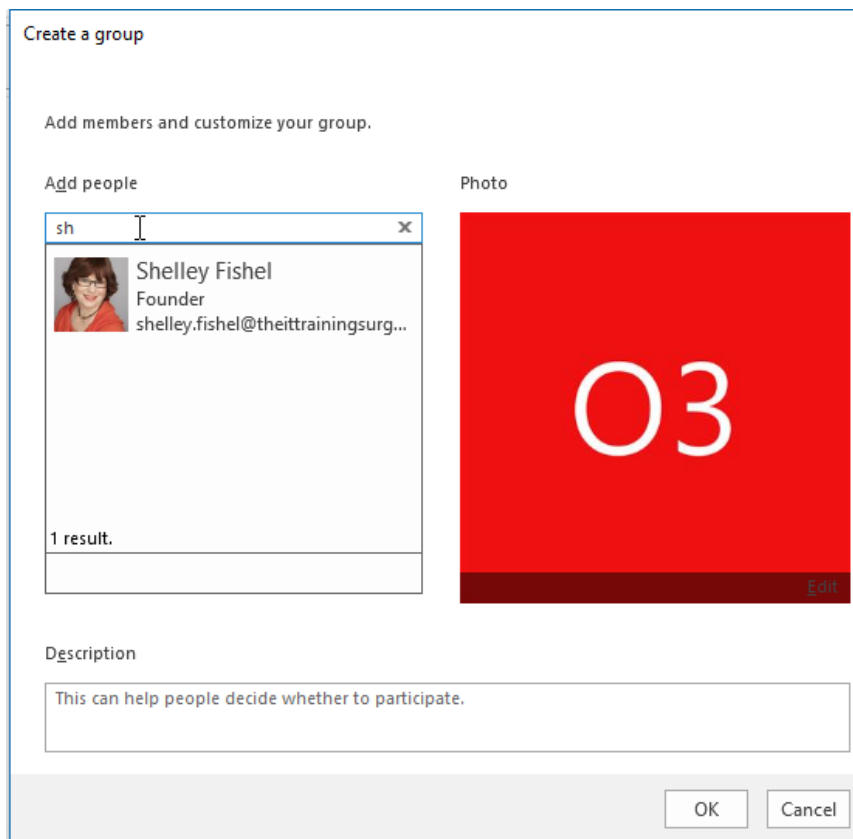


Figure 202 – Add people

The new group is now created.

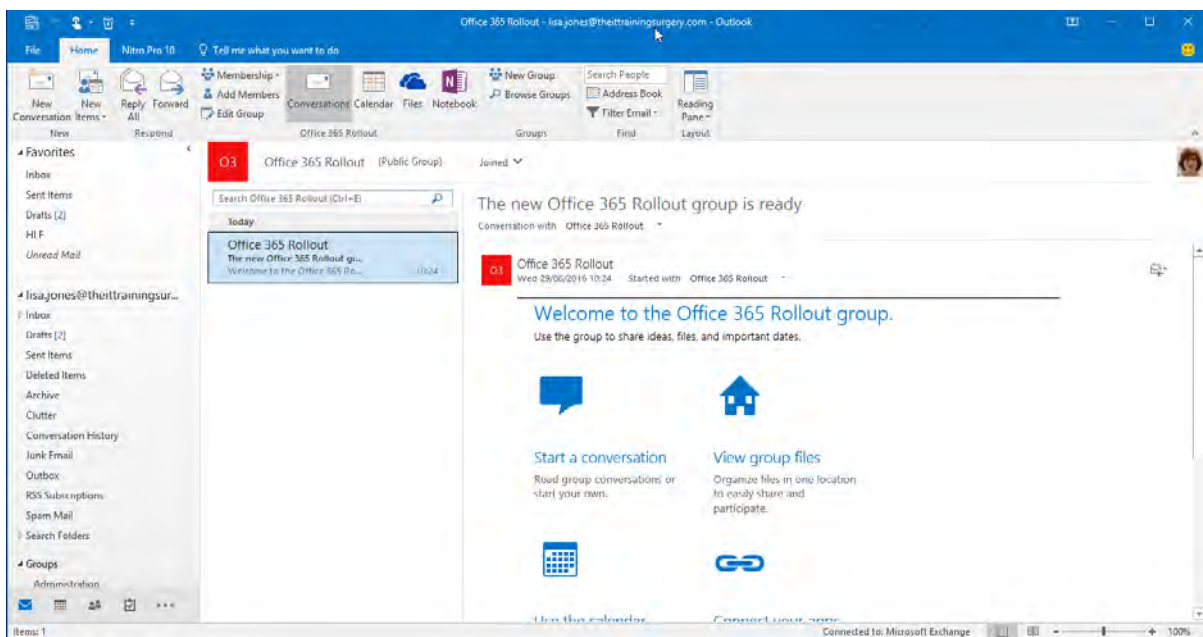


Figure 203 – Finished group

The welcome message shows you the different areas within the group.

**Conversations** – have IM type conversations with members of the group here. You can like a conversation too and the likes show up in the heading. If you are trying to get the feel for a particular project or task, you can see how many likes each comment gets.

**Calendar** – the group will have its own calendar where you can create meetings etc. that are particular to the group.

**Files** – each group gets its own OneDrive folder where group documents can be stored. This is a handy way of keeping all project documents in one place. Collaboration becomes easy as everyone has access to the documents.

**Notebook** – the group will have its own OneNote Notebook. Collaborate here by adding your comments and thoughts, capture meeting minutes etc. direct in the group Notebook.

## 19.4 FIND AND JOIN A GROUP

To find a group that you would like to join (in case you were not invited) click Browse Groups (1) then type the name of the group you want to join (2). When the group appears click Join (3).

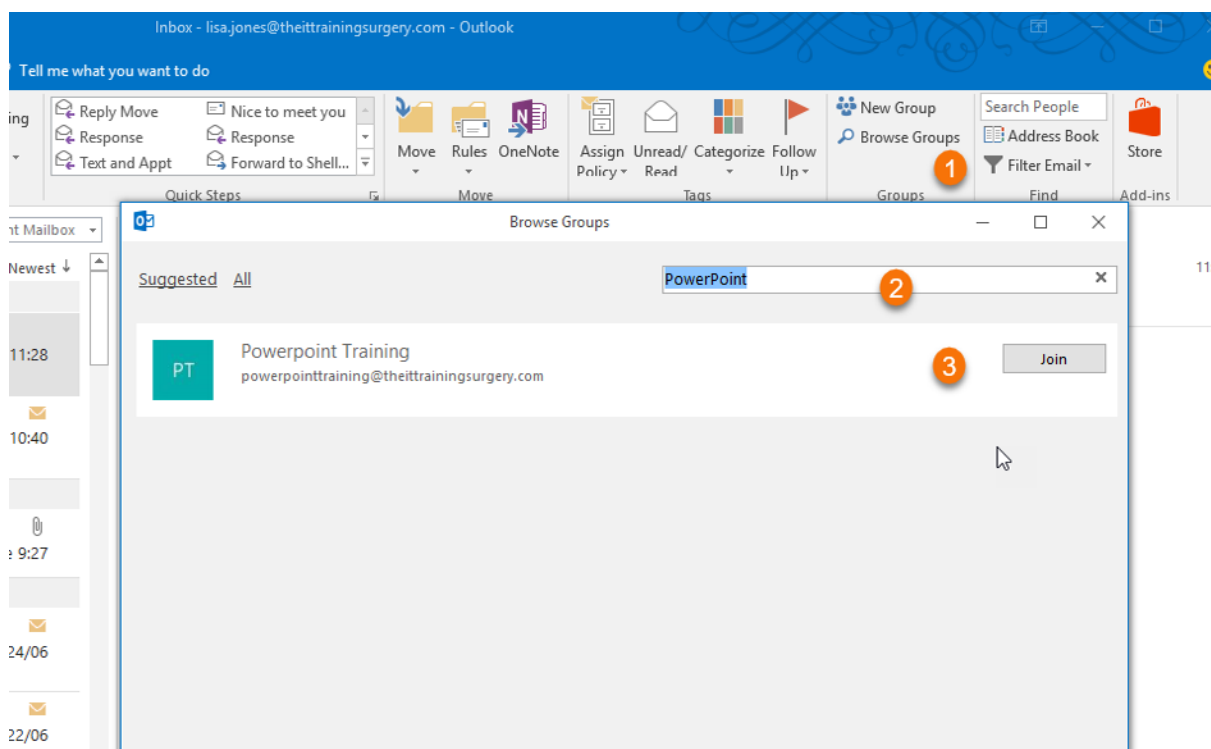


Figure 204

You can also double click on the group card and then select Join from the top right.

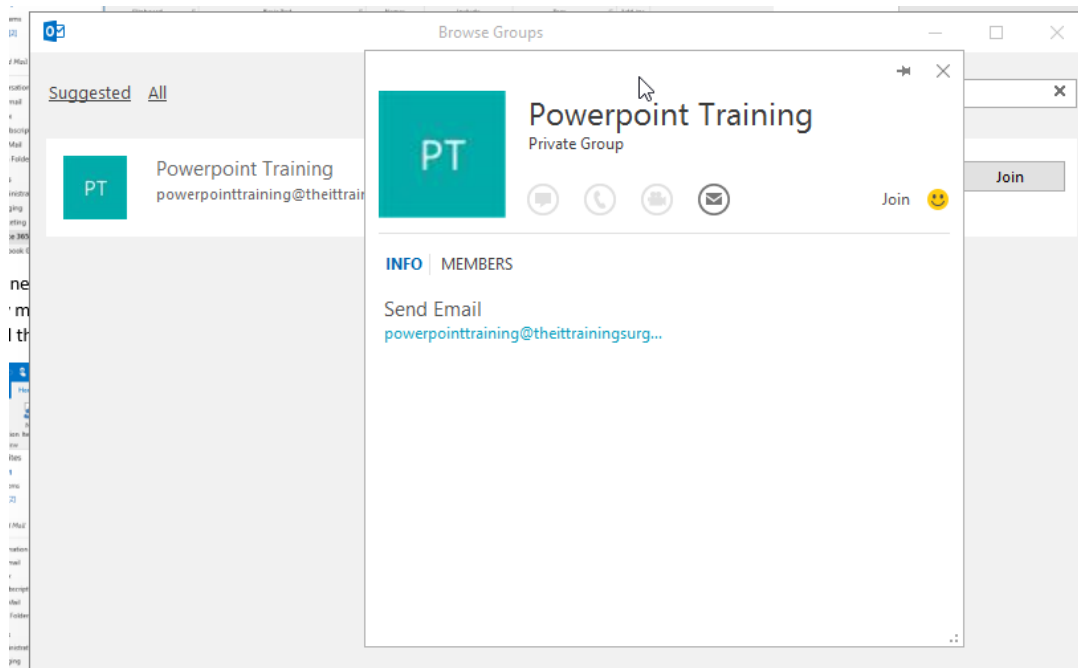


Figure 205

### 19.5 JOIN A PRIVATE GROUP

A group can be set as Public – anyone in the organisation can find it and ask to join or Private in which case only the administrator can approve. To join a private group, you will need to request permission.

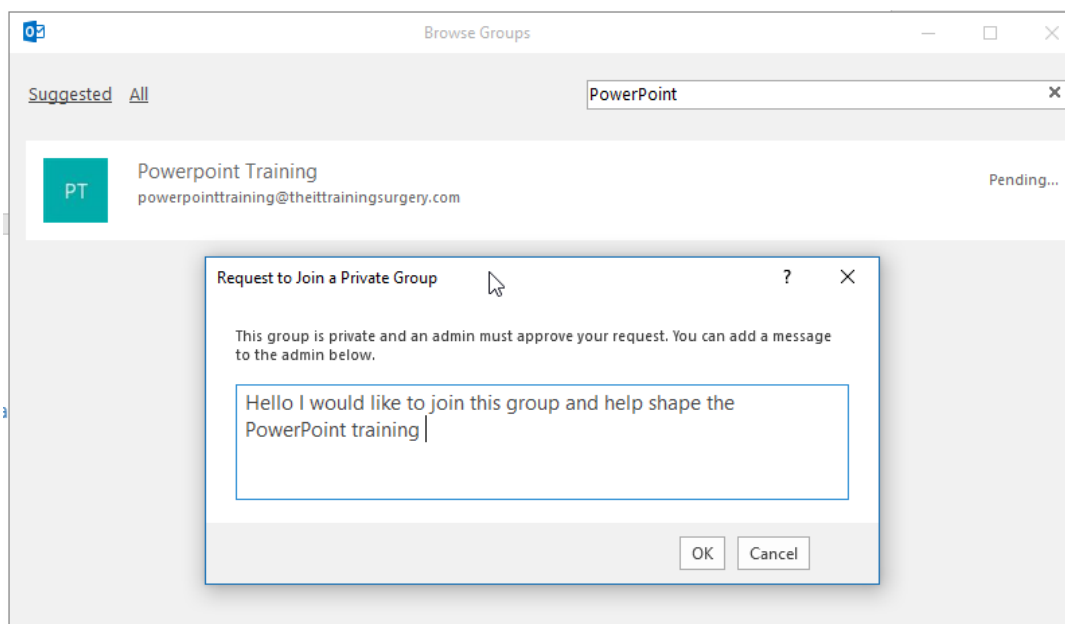


Figure 206 – Request to join a private group

Once you have sent off your request you will have to wait to be approved.

The group owner will receive an email notification telling them that you have asked to join the group.

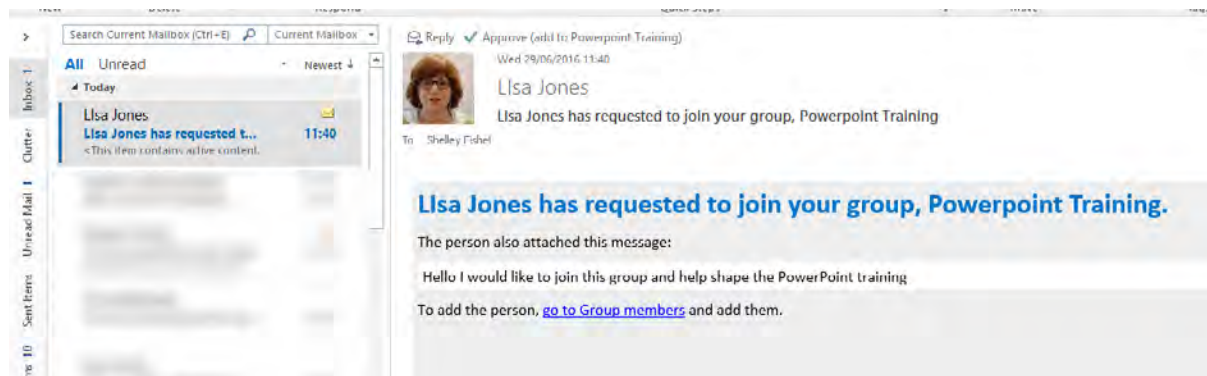


Figure 207 – Notification of the request

The group owner will go to the group members section and add you in.

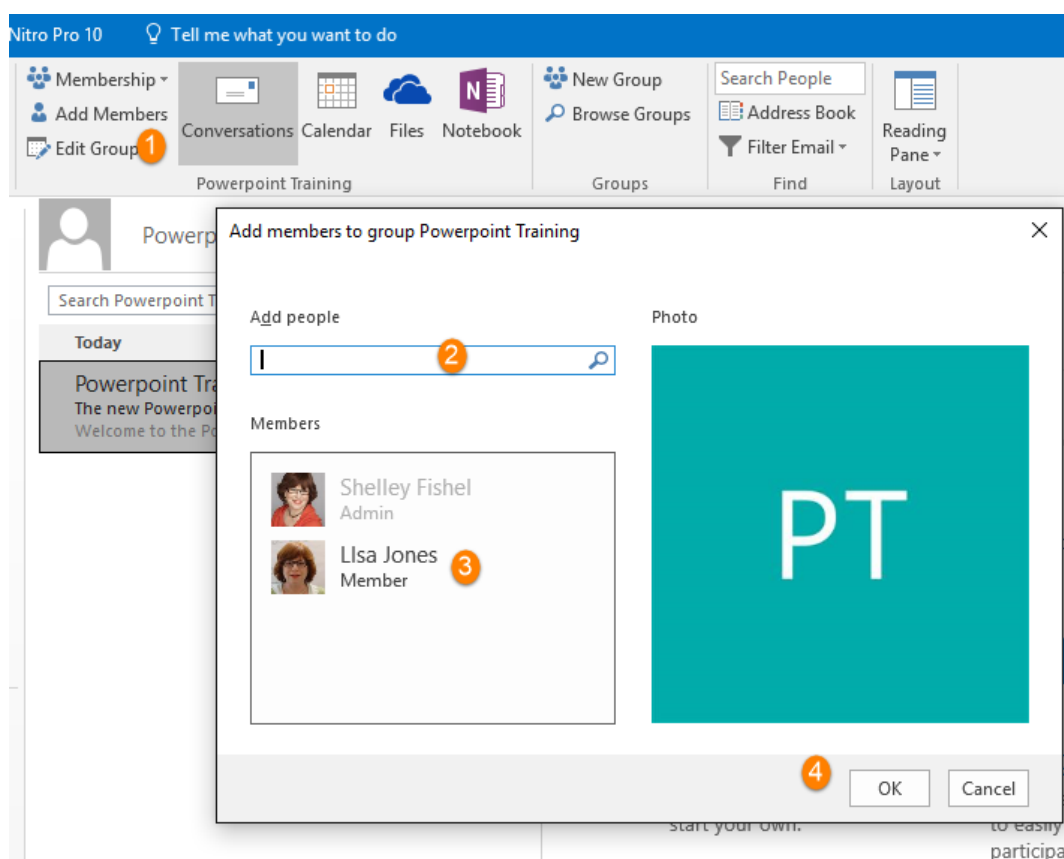


Figure 208 – Add a new member

As the group owner/administrator, click on Add Members (1) type the name to look for in the search bar (2) select the person to add (3) click OK.

Now when you click on the Add Members button, the added members are there.

## 19.6 RECEIVE EMAIL CONFIRMATION

Once you have been added to the group, you will receive email confirmation and the group will be added to the Groups section in the Navigation pane.

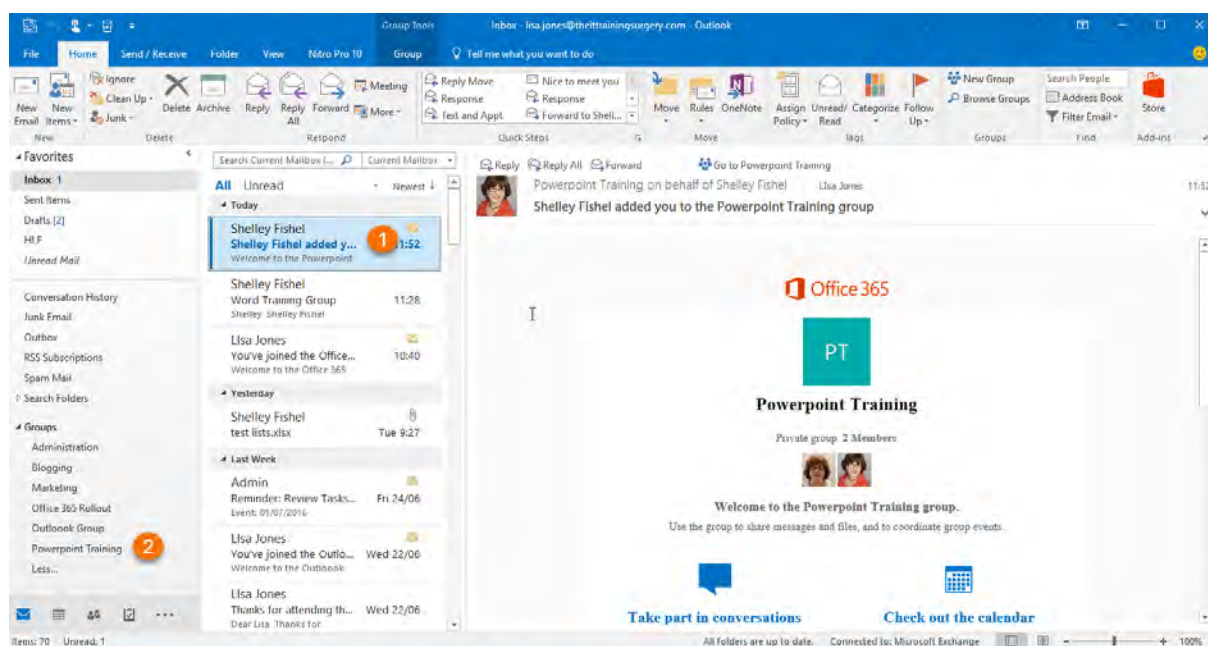


Figure 209 – Email confirmation

## 19.7 START A CONVERSATION

To start a conversation simply click on New Conversation (1) Note that the conversation is addressed to the group email address (2) Type a subject line (3) and then add your text (4). Click Send when you are done.

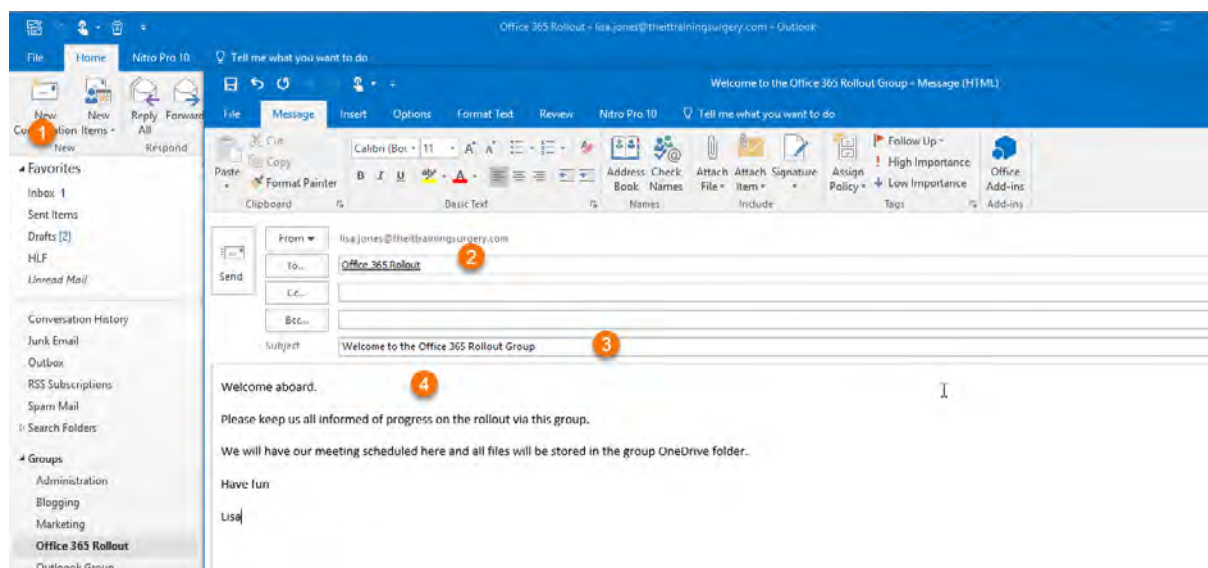


Figure 210 – Start a conversation

The new conversation will appear in the group inbox. There will be a bold notification telling you how many new messages are in the group inbox (1) the conversation appears in the list (2) you can read the content in the reading pane (3) and Like the message (4).

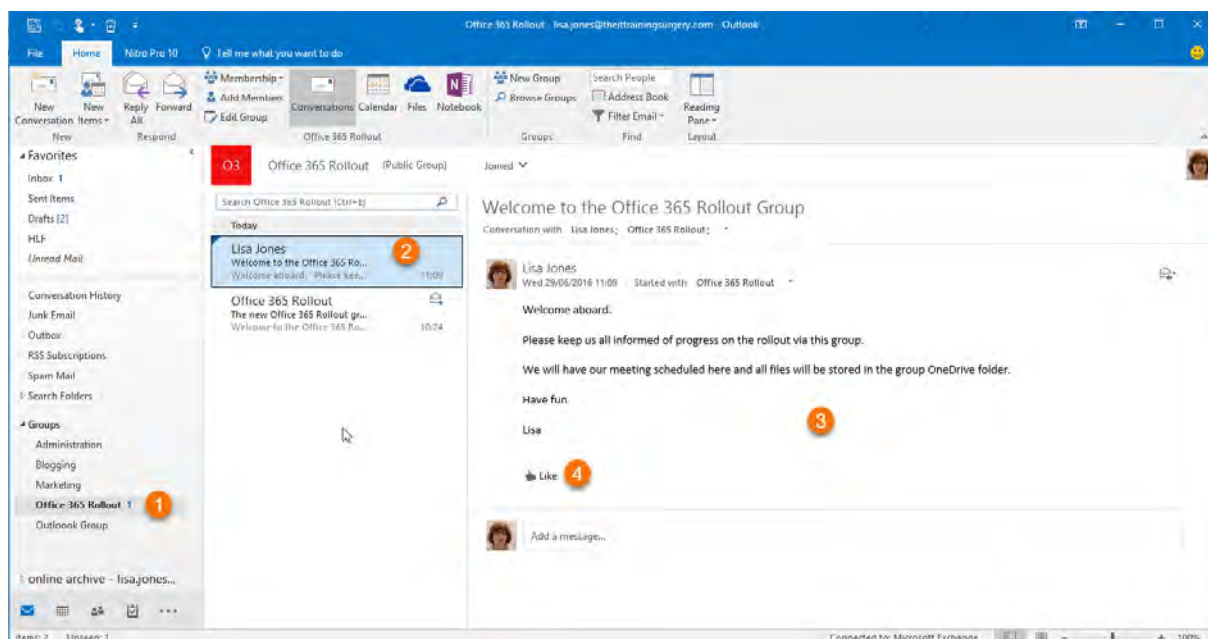


Figure 211

## 19.8 REPLY TO A CONVERSATION

When a new conversation is created all group members will see it in the Conversation list. However, if you are subscribed to the group you will also see it in your inbox (see note below on the difference between Subscribing and Joining).

To reply click Reply All (1) on the Ribbon or click the drop down on the message header and select Reply All (2).

This e-book  
*is made with*  
**SetaPDF**



PDF components for PHP developers

[www.setasign.com](http://www.setasign.com)

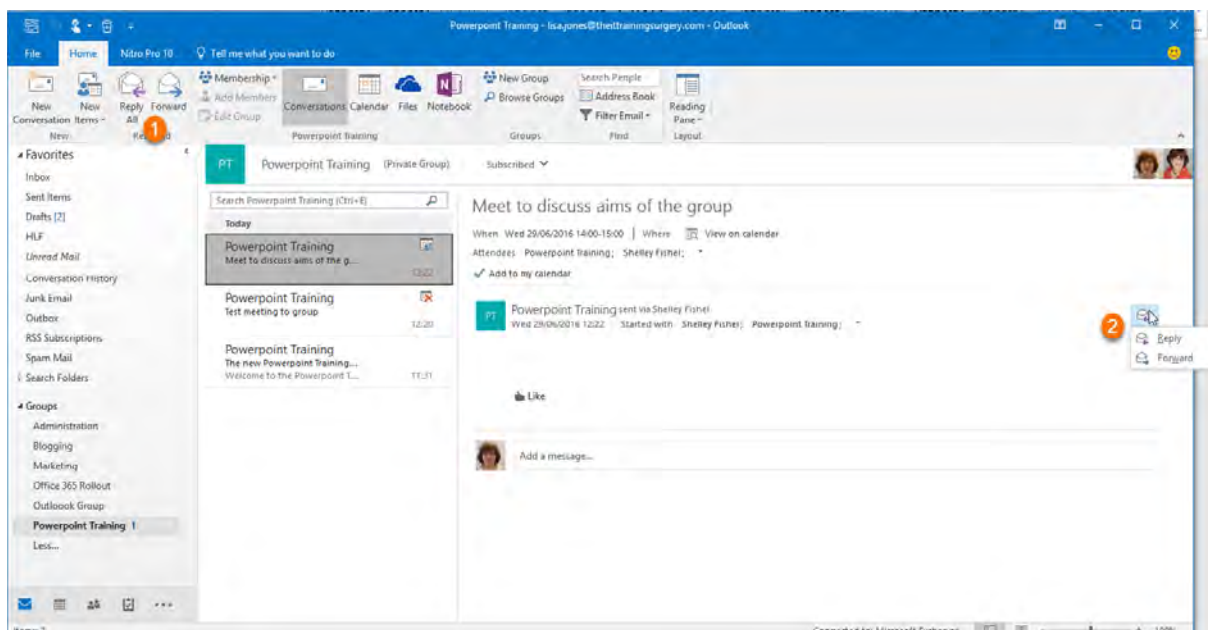


Figure 212 – Reply to a conversation

The reply will appear below the last message so that everything keeps nice and tidy and you can follow the conversation. When done click Send or if you don't like what you wrote you can Discard the message.

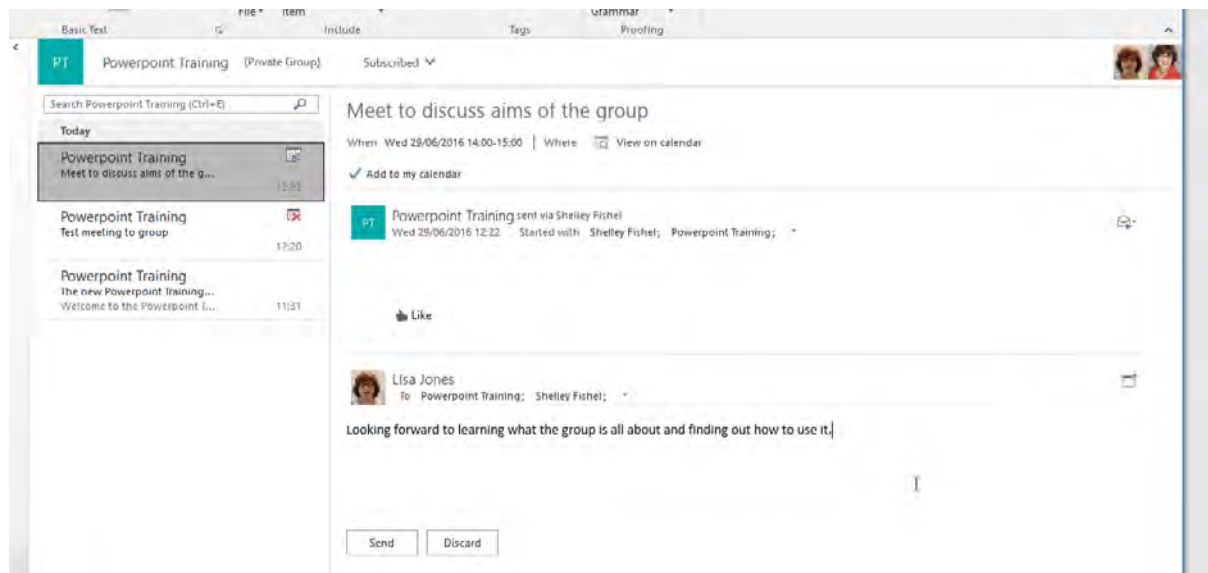


Figure 213

Once you have sent your reply it will appear in the group conversation list. (2) You will see a bold number next to the group name (1) showing you that there are unread messages. New conversations will show with a blue border to highlight them. You can also respond inline in the Reply box (3).

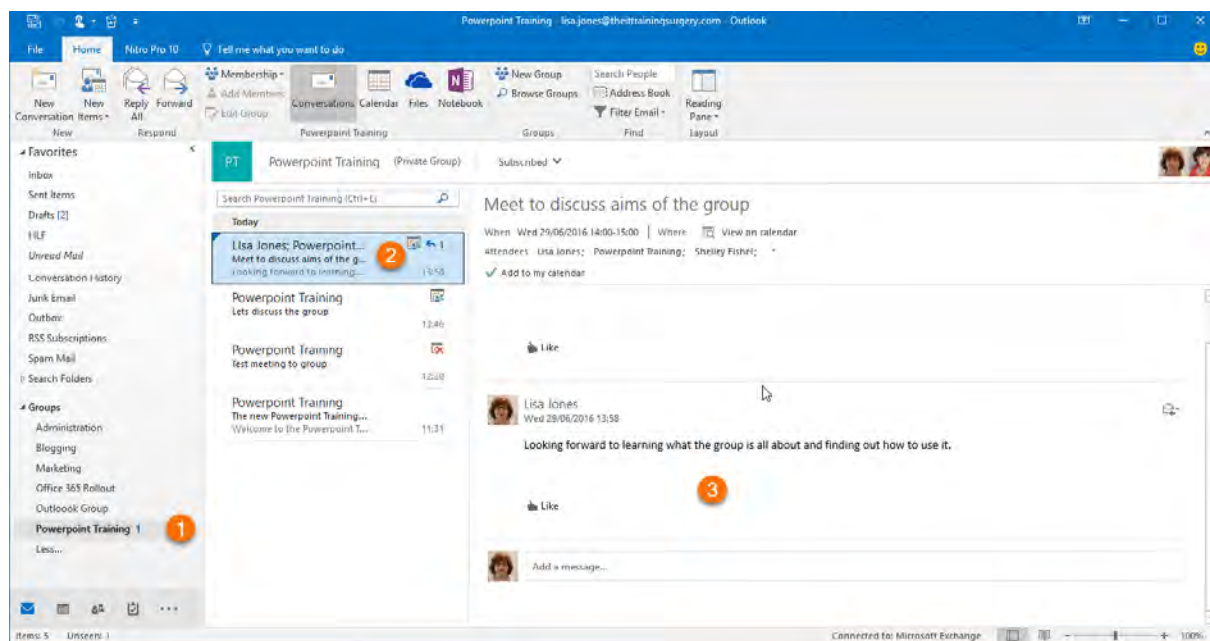


Figure 214

## 19.9 A WORD ABOUT SUBSCRIBING OR JOINING A GROUP

It's important to understand the difference between joining a group and subscribing to it because the difference affects your group calendar.

When someone creates a group, they have the option to subscribe all new members automatically. If they choose not to subscribe members automatically, the members will be joined to the group but won't receive conversations or calendar events in their private inbox. These items will only appear in the group mailbox.

A subscribed member receives conversations and calendar events in both their private inbox and the group inbox. The benefit of this is that you don't have to be in a group to see group emails and calendar invitations. Also, you can open and reply to them from either location. If you aren't subscribed to a group but want to be, click the Membership button and choose Subscribe.

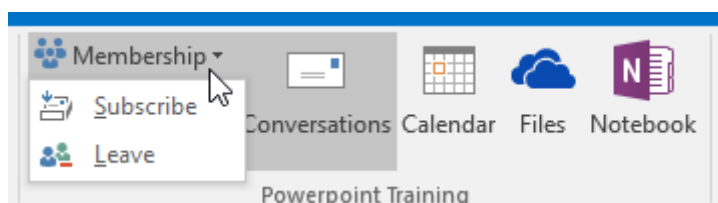


Figure 215 – Subscribe to the group

A success message is now displayed and you are subscribed to the group. This means that you can see notifications of conversations and invitation or events in your inbox as well as in the group.

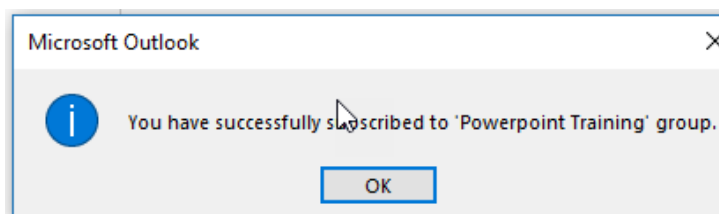


Figure 216 – success!

### 19.10 ADD A GROUP MEETING

Start off in the Group you are adding the meeting to – in this example the PowerPoint Group.

Click on the Calendar icon and you will see the Group Tools (1) click New Meeting (2) or New Skype Meeting (3) to set up the meeting request. Note that the request is automatically addressed to members of the group and to the group itself (4). Add in a subject line (5) a location (6) and set the date and time of the meeting (7). Click Send when you are done.

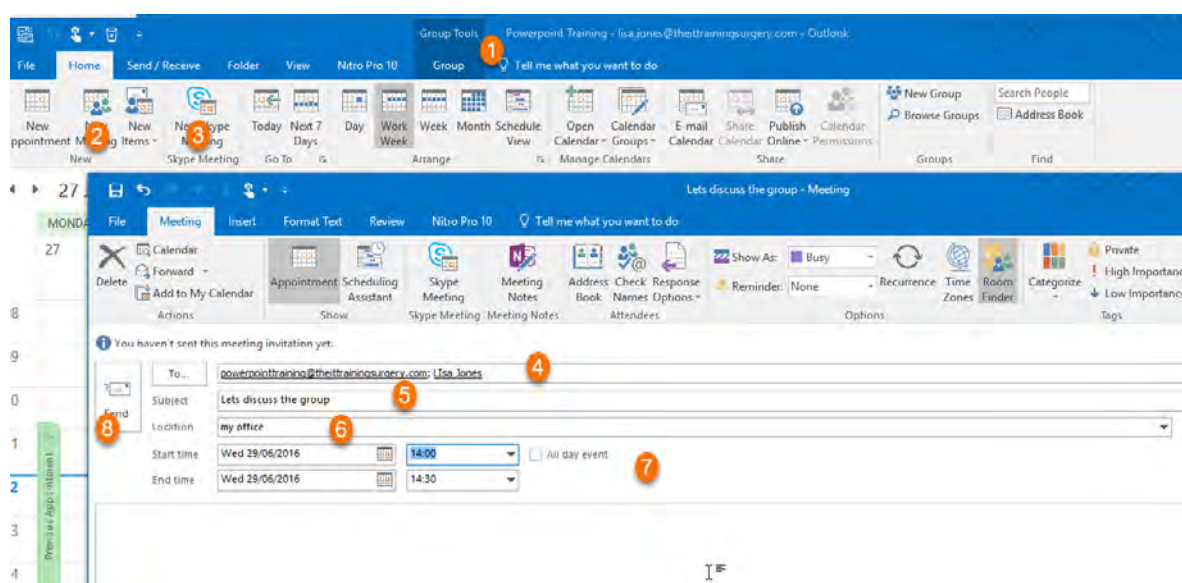
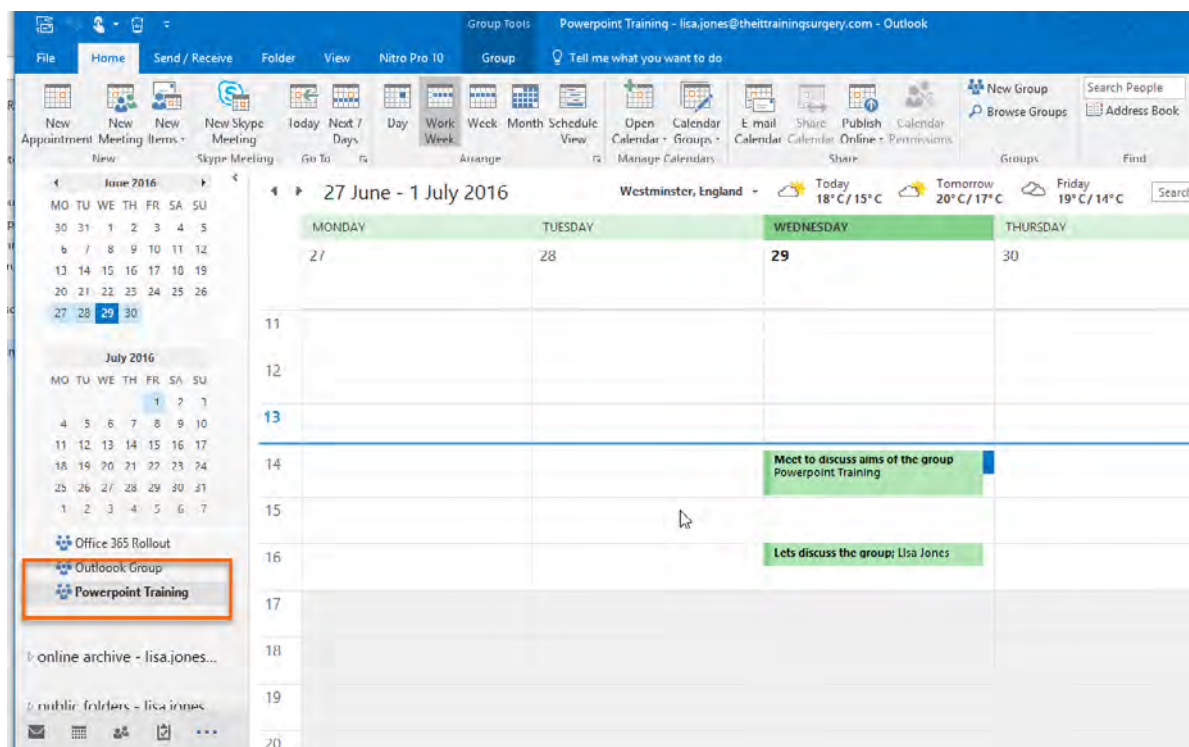


Figure 217 – Add a group meeting

Once the meeting request is sent, the meeting appears in the Group Calendar. The other members of the group receive a notification of the meeting (if they are subscribed to the group) or can see it in the Calendar. The meeting shows up for all Group Members.



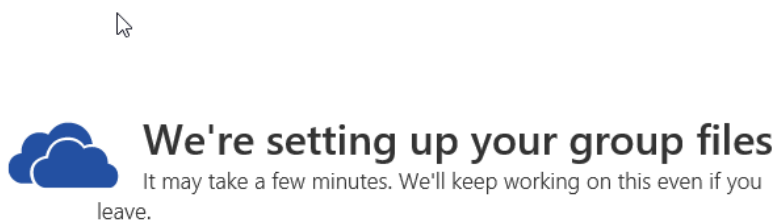
**Figure 218** – See the meeting

You can also add the meeting to your own calendar by clicking the Add to calendar shortcut in the meeting request header.

## 19.11 GROUP FILES

When working on a project it is useful to have one place to store all documents, picture and files that relate to that project. This can be accomplished with Group Files. A OneDrive folder for the group is created. Anyone who is a member will have access to the group files and can work on them independently or as part of a collaborative effort.

The first time that you click the Files button on the Group Home Ribbon, Outlook will open up a browser and tell you that the group files are being created. You will most likely need to wait a little while until the OneDrive Folder has been set up.

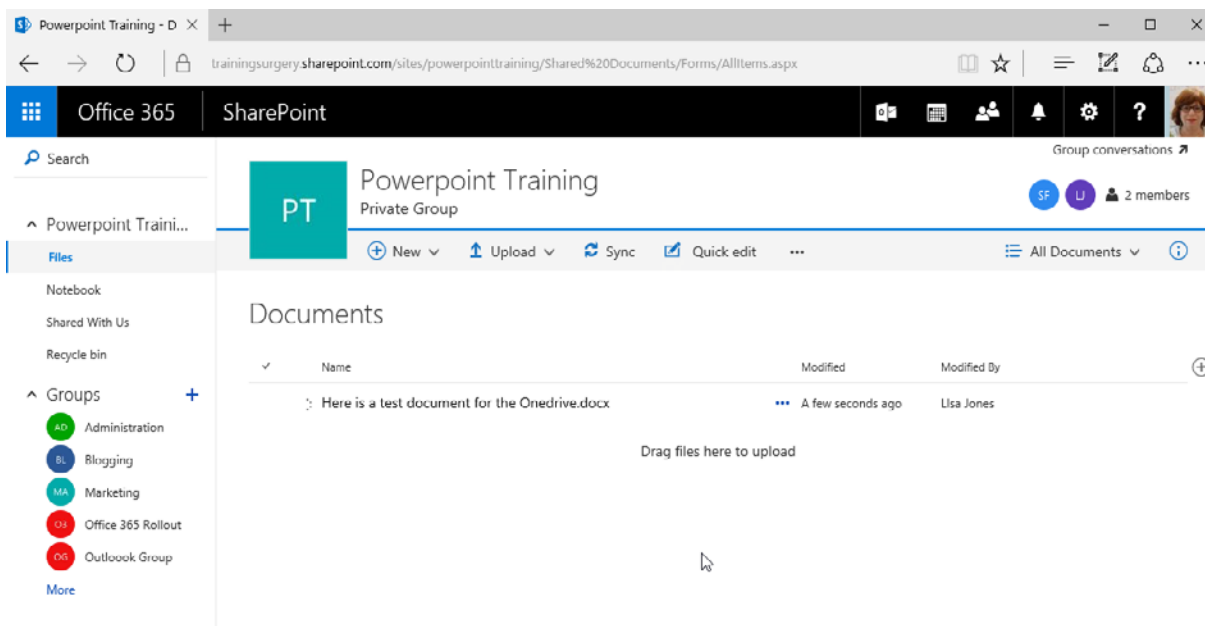


**Figure 219** – Group file storage created

Once that is done when you click on the Files button you will be taken to the online location for your files.

### 19.12 SHARED FILES

By default, all members of the group have editing access to any files stored here. Files can be shared with others by using OneDrive normal sharing process.



**Figure 220** – OneDrive folder storage

Add files to the group OneDrive folder by clicking on Upload and selecting the files to upload or simply dragging from the folder to the window where it says Drag files here to upload.

Anyone in the group can see and edit the files and they can also be worked on in the browser.

## 19.13 GROUP NOTEBOOK

There is also a Group Notebook. The first time you click the icon, the note book will be set up. The OneNote notebook is an online notebook so that everyone has access to it. The first time you create a group notebook, you will be told that it is empty and asked to click to set up the first section. Then you can use it just like any OneNote notebook.

You can access the notebook on your computer using OneNote 2016 too. To do this open up OneNote on your desktop or laptop, click File > Open other notebooks. Find the group notebook in the list and click on it to open in OneNote.

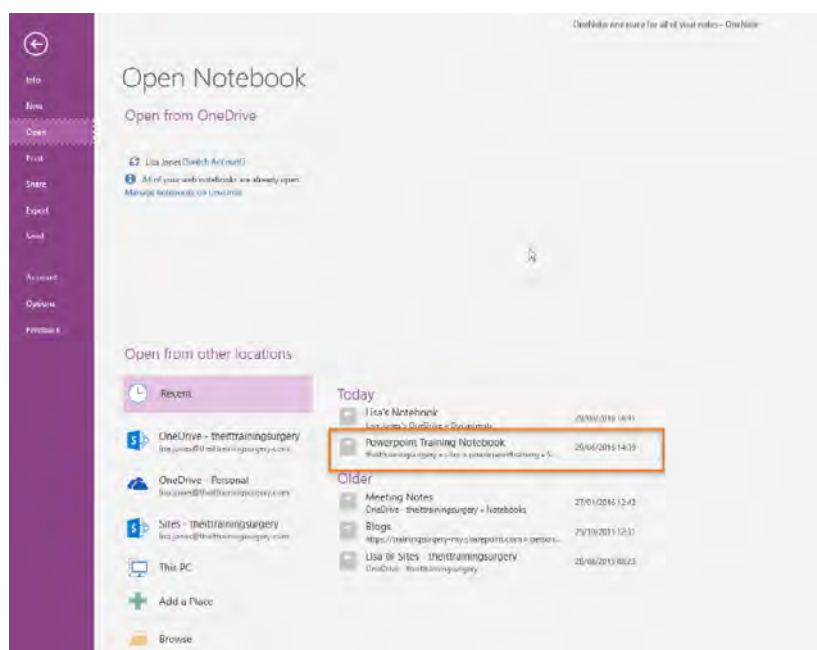


Figure 221

When the notebook is open in OneNote 2016 you can add things to it as you think of them. The notebook is synchronised so that any changes will show up online and everywhere that this notebook is accessed from.

There just may be a slight delay due to the internet connection you are on.

# INDEX

## A

Alt Key 13

Appointments 117

Attachment

add 11, 12, 13, 15, 17, 24, 27, 30, 37, 42, 43,  
44, 46, 49, 50, 62, 78, 79, 80, 81, 82, 85,  
88, 91, 93, 98, 120, 126, 127, 128, 129,  
131, 133, 139, 140, 147, 148, 157, 158,  
161, 162, 167, 168, 170

add a copy 30

Attachments

opening 39

preview 18, 39, 41

## C

Calendar 103

insert a copy 170

share 111

views 103

Calendar Groups 113

Calendar Overlay 113

Contact

folders 134

Contact Group

create 130

email 132

Contacts 123

create 125

view 123

Conversation

cleanup 54

Ignore 58

Settings 53, 56, 57

View 11, 51, 52, 53, 54, 65, 97, 103, 104, 116,  
123, 141

## D

Delete

Permanently 59

Deleted Items

Empty 60, 61, 62, 63

Drag and drop

email and calendar 9, 13

## E

Email

Delete 59

Options 34, 48, 63, 86, 88, 89

Reply 26, 27, 29, 30, 31, 84, 85, 86, 88, 91,  
164, 165

Reply to All 26, 27

Reply with meeting 29

templates 93

## F

Favourite People 128

Fields

show 10, 32, 51, 52, 88, 104, 106, 112, 113,  
120, 137, 157, 159, 165, 170

Filing 69

drag and drop 70

move email 72

Folder

Clean Up 55, 56, 57, 58

## G

Groups 157

add members 157

conversations 162

files 168

find and join 159

meetings 167

new 157

notebook 170

subscribing 166

## M

Mail Merge 145

Meetings 119

**M**

Move  
button 72

**P**

peek 17, 19, 20, 21, 128

## Peek

Dock 18, 19, 20, 21

people 8, 17, 19, 20, 22, 60, 103, 108, 113,  
117, 120, 121, 123, 128, 129, 132, 145,  
158

Tasks 9, 21, 22, 137, 138, 139, 140, 141, 142,  
144

Permission 36, 37

## Picture

format 36, 42, 43, 44, 49

Insert 30, 31, 42, 43, 44, 45, 46, 47, 48, 50,  
147, 148

online 25, 45, 46, 64, 169, 170

**Q**

Quick Access Toolbar 11, 13, 62, 93

## Quicksteps 76

categorise and move 79

flag and move 80

forward to 82

meeting with 83

new email to 81

reply and move 91

standard email response 88

standard new email 89

standard response and appointment 85

**R**

Rule 151

Rules 151

**S**

Scheduling Assistant 120

## Search

criteria 97

email 96

Search Folders 100

## Signature

Create 9, 48, 69, 73, 76, 79, 80, 82, 83, 84, 85,  
86, 87, 88, 89, 91, 101, 114, 118, 119, 120,  
125, 129, 130, 135, 136, 142, 144, 147,  
151, 157

**T**

Tasks 137, 139

create from appointment 144

create from email 142

Themes 35

## The Ribbon

Folder 10, 13, 57, 58, 61, 62, 65, 66, 68, 69,  
70, 73, 74, 77, 79, 91, 100, 101, 102, 133,  
135, 151, 168

Home 10, 55, 56, 64, 99, 108, 111, 116, 125,  
127, 130, 146, 168

Timescale 108

To do 137

## Tracking

meeting response 121

**V**

## Voting

Buttons 34, 37, 38