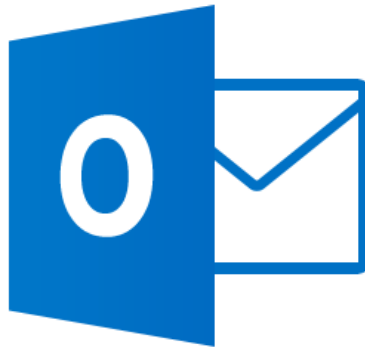


 Office Doc



# **MS-OFFICE OUTLOOK 2016**

*English version*

Mail – Contacts – Calendar  
Tasks – Notes – Sharing - Archiving

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# GENERALITIES

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## 1 Outlook – Exchange

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### 1.1 Jargon

A message, an appointment, a task etc...is an *item*. You will encounter this work in several options, buttons and other commands.

Mail, Calendar, Tasks ... folders are also called *components or modules*. This documentation uses the word component.

### 1.2 Internet Provider – Cloud and Exchange Server

To send mail OUTLOOK needs to be connected to a *mailing service*. To use a simple comparison : OUTLOOK is the postman and the *mailing service* works as the *post office*.

**Stand-alone computer linked to your ISP** (Internet Service Provider) : the *mailing service* will be your ISP. Your mailbox is stored with your ISP and you download your messages onto your workstation.

*Outlook works with an outlook.pst file which is stored in your profile (hard drive)*

**Computer linked to the Cloud** : it can be the case if you have subscribed to a Microsoft Office 365 account. Your mailbox is hosted on the Microsoft Exchange Server and you download your messages onto your workstation.

*Outlook works with an xxx.ost file which is stored in your profile, on your hard disk. Your mailbox is physically with Microsoft and you can re-create the .ost file any time, on any computer.*

**At work with a company Exchange Server** : the *mailing service* is managed by Exchange

*Your mailbox is with the Server and there is an Exchange administrator..*

Exchange manages the following features :

Public Folders

The Out of Office Assistant

Granting Permissions to other users

Recalling a message

Checking the schedule planner when setting up a meeting (on a stand-alone computer, the attendee's calendar needs to be published on an appropriate web server – microsoft.com for instance.)

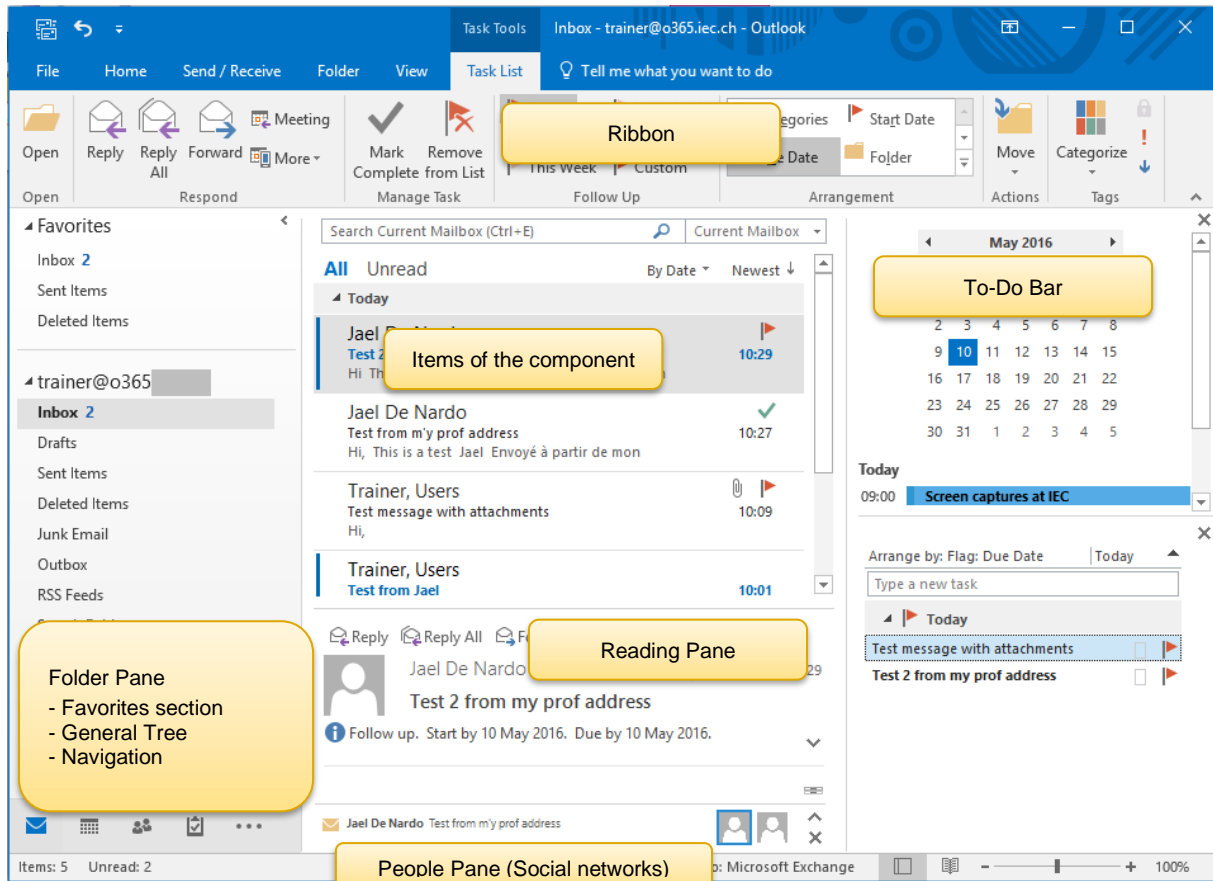
## 2 Interface

### Characteristics

**Intuitive** – this is a characteristic of the 2007-2010-2013 environment

**Integration of all components** – Outlook tries to work as a « platform » from where everything can be accessed with a mouse click ... ( “transverse” functionalities).

Here below (size reduced and personal information hidden) the default welcome window :



## 3 The Ribbon provides an intuitive access to the commands

As for Word, Excel, PowerPoint ... get into the habit of checking the Ribbon and its tabs whenever you have a problem or task to perform. Think logically to find which tab will display the required button.

 Reminder : the Ribbon can now be customized (hiding groups, custom tab ...)

### 3.1 The HOME Tab

Whatever the component (mail, calendar, tasks), it displays all the commands the user daily needs : *creating a new item, quick actions ...*

### 3.2 The SEND/RECEIVE Tab

Whatever the component, its content does not vary. It displays commands related to receiving & sending messages : *manual send/receive, set send/receive groups (related to accounts), download headers only, work offline ...*

### 3.3 The FOLDER Tab


It mainly displays commands to organize your component (*new mail or contacts folder, new calendar*), to check the folders properties and for components other than mail : sharing.

### 3.4 The VIEW Tab

*Viewing the component items, advanced settings for views, hiding/viewing the various Panes (Navigation, People, To-Do Bar etc ...) ...*

### 3.5 The help bulb : TELL ME WHAT YOU WANT TO DO

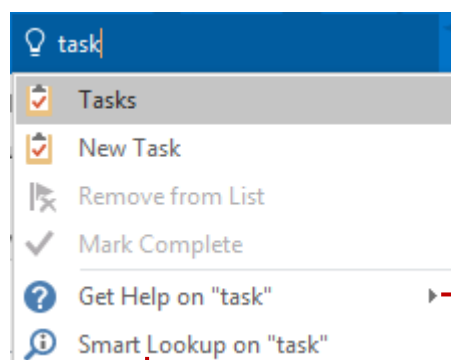
Click bulb – right end of the ribbon



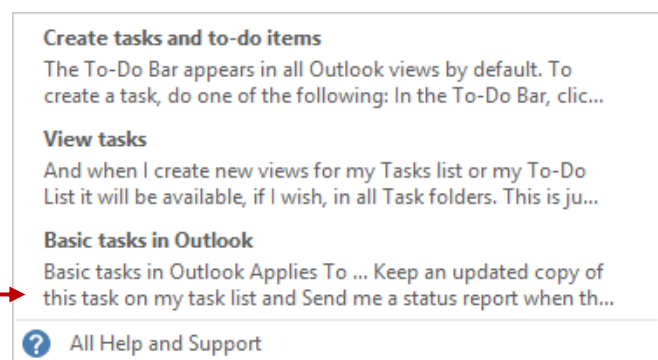
Some suggestions

Type the required command

Caution : the available options are not *suggestions* but a direct access to the command



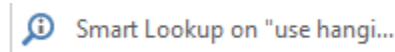
Next topic



Access to the *explanations* on the command

### 3.6 Smart Lookup

The above option



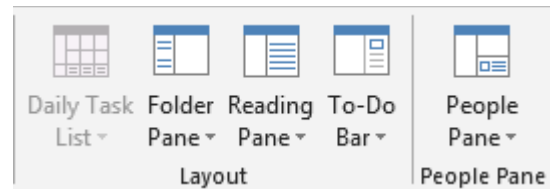
Or the same one accessed by right clicking a selection

A pane will be displayed on the right of the Word window with a list of related web sites (the sites are searched by Bing, the Microsoft search program). You cannot add your own manual search to the Bing result ...

## 4 The Panes improve Outlook structure

### 4.1 Viewing and resizing

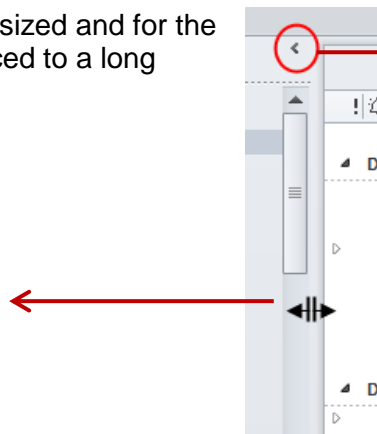
Click on the VIEW button to show & hide the various Panes.



\* Daily Task List available for a view other than MONTH (Calendar)

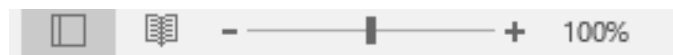
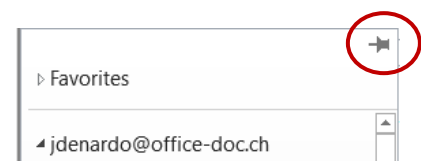
They can easily be resized and for the Folder Pane be reduced to a long vertical bar

To resize



Vertical minimize for the Folder Pane

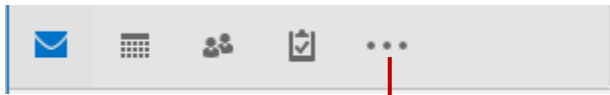
**2016** : to expand it again : the chevron will be displayed in the other direction and you can then choose to pin it and keep it « floating » or dock it again.



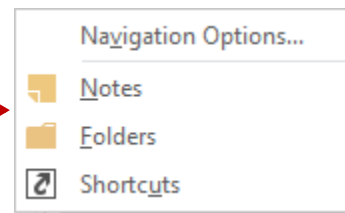
The first two buttons : *Normal view* and *Reading view* (the Reading view hides the Folder Pane, the To-Do Bar and the Ribbon).

The zoom slider works on the Reading Pane contents.

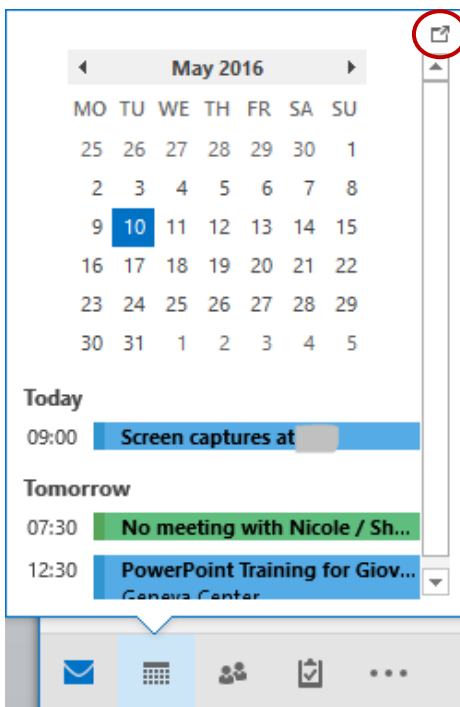
## 4.2 The Navigation Pane



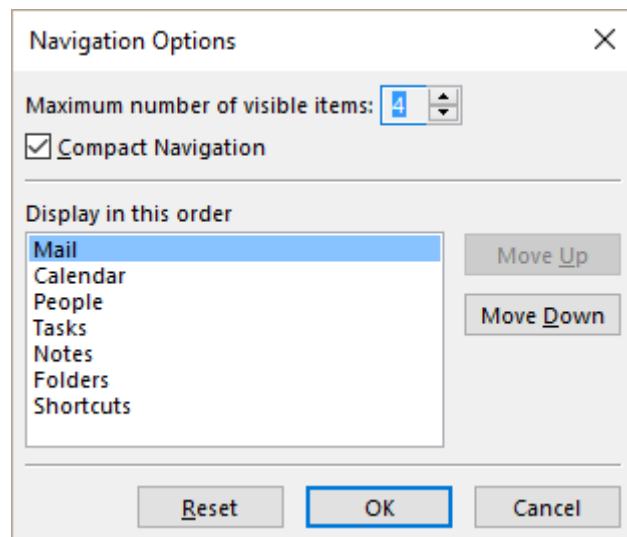
Click on the component name (Mail, Calendar ...) to display it on the right part of the window.



**FOLDERS** : the tree of your mailbox is displayed (all its folders). The right part of the windows displays the contents of the selected folder



Click to display the Calendar section in the To-Do Bar. *But you cannot choose its position in the To-Do Bar (first – second or third)*



Various settings are provided in the NAVIGATION OPTIONS dialog box :

## 4.3 The component area (all its items)

That's where all the mail or calendar or notes ... items are displayed.  
Most commands will be applied to the active item or to all of them :

- ✓ Assign categories, add a flag
- ✓ Sort & Filter
- ✓ Search for a specific item. A tab dedicated to searching will be automatically displayed on the Ribbon.
- ✓ Rules
- ✓ Etc ...

#### 4.4 The Reading Pane

It displays the contents of the selected item. It is active by default only for the Mail component. But you can make it active for any other component. You may also set its position (bottom, right).

#### 4.5 The People Pane

The Outlook Social Connector connects you to the social and business networks that you use, including Microsoft SharePoint 2010, Windows Live, or popular social network sites such as Facebook, LinkedIn, and MySpace.

##### By default – no connection to a social Network such as Facebook

When you click an e-mail message or meeting, you see more information about the message sender and recipients or meeting organizer and attendees. The Outlook Social Connector enables a quick view of related Outlook content such as recent e-mail messages and joint meetings, shared documents from SharePoint sites.

##### Connected to a social Network

If you have added a connection to one of the available social networks, the pane will display the status updates or activities of your contact. Note : most companies do not allow this connection.

*Facebook : due to a change in the tool called Graph Api used by Facebook, the connection to Facebook was not available at the time this documentation was written (April 2016).*

##### Professional network

Lots of companies have their own internal social network and limit the connection to this network.

*This Pane is part of the Reading Pane. If you hide the Reading Pane, the People Pane will be automatically hidden. On the other hand you may hide the People Pane only, without affecting the Reading Pane. By default, Outlook Social Connector is off. Turn it on through FILE – OPTIONS – Category ADD-INS – COM ADD-INS – GO.*

##### How to connect

- VIEW Tab – PEOPLE PANE Group – Drop-down list of the PEOPLE PANE Button – ACCOUNT SETTINGS Option
- A dialog box displays all the available social sites
- Follow the instructions ....

## 4.6 The To-Do Bar

When the To-Do Bar is displayed in the Mail component, it turns Outlook into a really efficient working platform because you see your mail messages, the calendar and your next three appointments, your urgent tasks ... all at a glance.

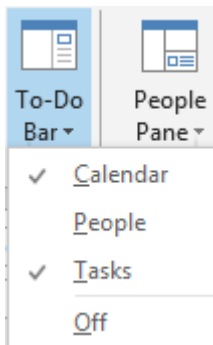
The To-Do-Bar helps to improve how you *manage your time and priorities*.

The To-Do Bar displays by default :

- ✓ 1 row for the Date Navigator
- ✓ The first upcoming appointments
- ✓ All flagged messages and tasks you may have created.

### 4.6.1 Managing

- VIEW Tab – LAYOUT Group *Off*  
Should the Bar be displayed or not ?



*Calendar, People, Tasks*

The bar is divided into 3 sections. You are free to display only what you need

*Sizing* : drag the separation line.

### 4.6.2 Working with the To-Do-Bar

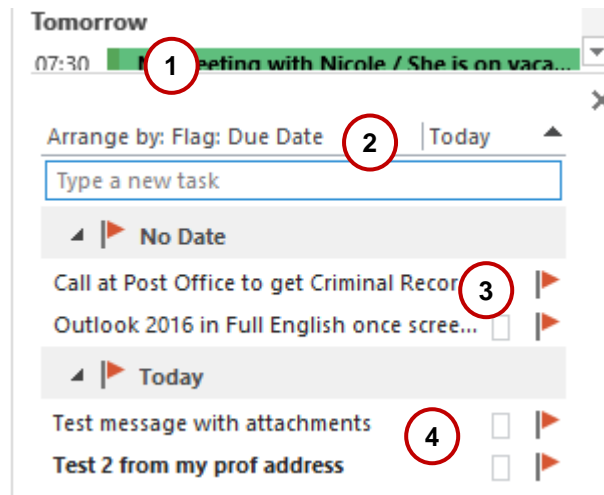
#### **Calendar section**

Click a date : the day's items are displayed below the date navigator

*Double-click a date : the Calendar is run and fully displayed*

*Double-click an appointment, an event ... : the item is opened into a separate window*

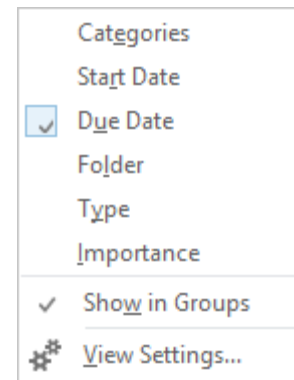
## Tasks List section



❶  
The section sizing line

❷  
Right click to display the shortcut menu. Set the *group criteria* if you wish the Task List to be shown in groups.

Use the *View Settings* option for an extensive customization

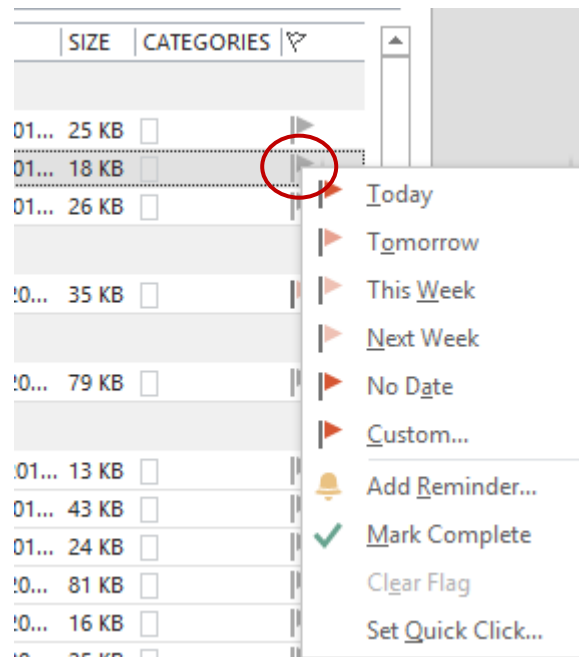


❸  
Two « real » tasks. They have been created either by typing in the textbox *Type a new task* or by right clicking onto an empty space in the To-Do Bar and selecting the NEW TASK option.

Nothing distinguishes a task from a flagged message. The two tasks of the above screen capture are grouped simply because both have no due date.

❹  
Flagged message.  
Here below how to proceed : point the required message at its right end, in the flag column (inside the component) :



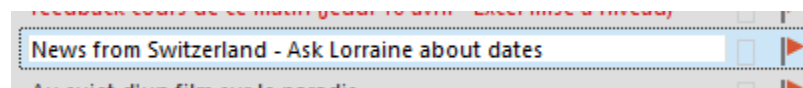


*Simple click* : the flag is red and the due date is for TODAY.

*Right click* : a shortcut menu will be displayed and you can change the due date, add a reminder ...

The source message and its task in the To-Do Bar will be both displayed in red when the due date is over.

**Interesting** : the subject text can be modified (click once more on it or F2) without affecting the source message.



### 🔴\* REMOVING A TASK

Caution no DEL key in the To-Do Bar or it is the SOURCE item that you will delete. Simply click on the flag.

## People section

*By default* :



Run a search :

Jael

RESULTS (3)



Jael De Nardo (jdenardo@office-doc.ch)



Jaël De Nardo

(2<sup>ème</sup> = adresse gmail)

The pane will display the matching contacts.

*Point* the contact to display its *People card in its collapsed version*.

*Double-click* to open it full :

The *Contact card*

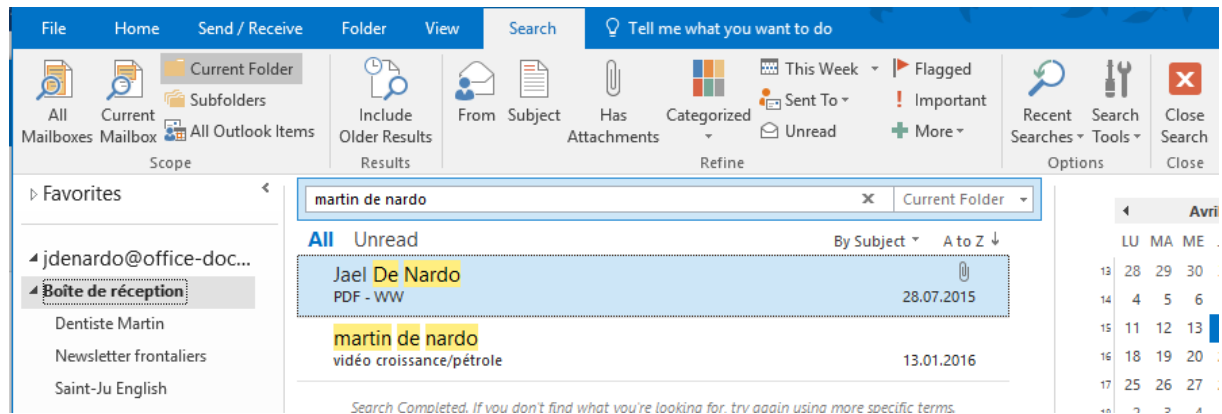
*Right click* to display the following shortcut menu :

Here the *People* section with two favorites :

## 5 Common to all components : searching tools

Commands related to searching have been practically turned into a component of its own ! Searching tools work the same, whatever the component.

Click in the search textbox, usually located at the top right of the component area. A SEARCH tab will be displayed. The screen capture below shows a *mail* search :

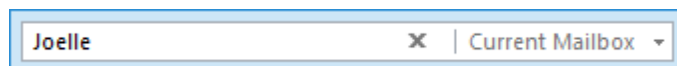


### 5.1 It is instant

Provided that your Windows environment allows it, the search is instant. When you type the searched characters, the items are automatically filtered to display only those containing the text in *the subject or in the body text*.

### 5.2 General search

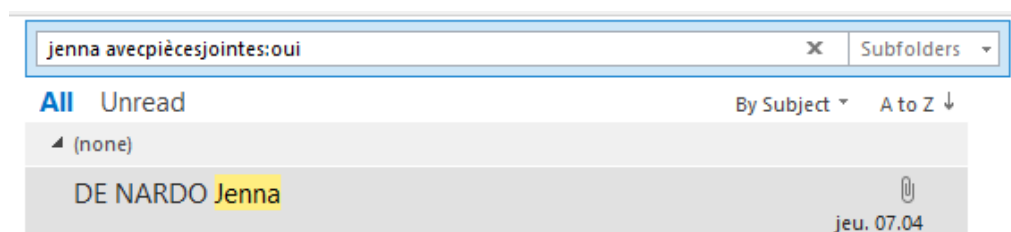
Type the required characters in the search textbox :



*The function is not case sensitive.*

### 5.3 The SEARCH Tab and its buttons

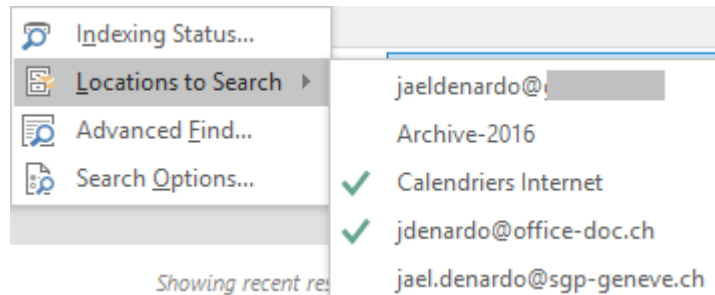
The SCOPE group will let you set which folders should be searched. The REFINE group will run the search but adding criteria (one by one). Here below an example :



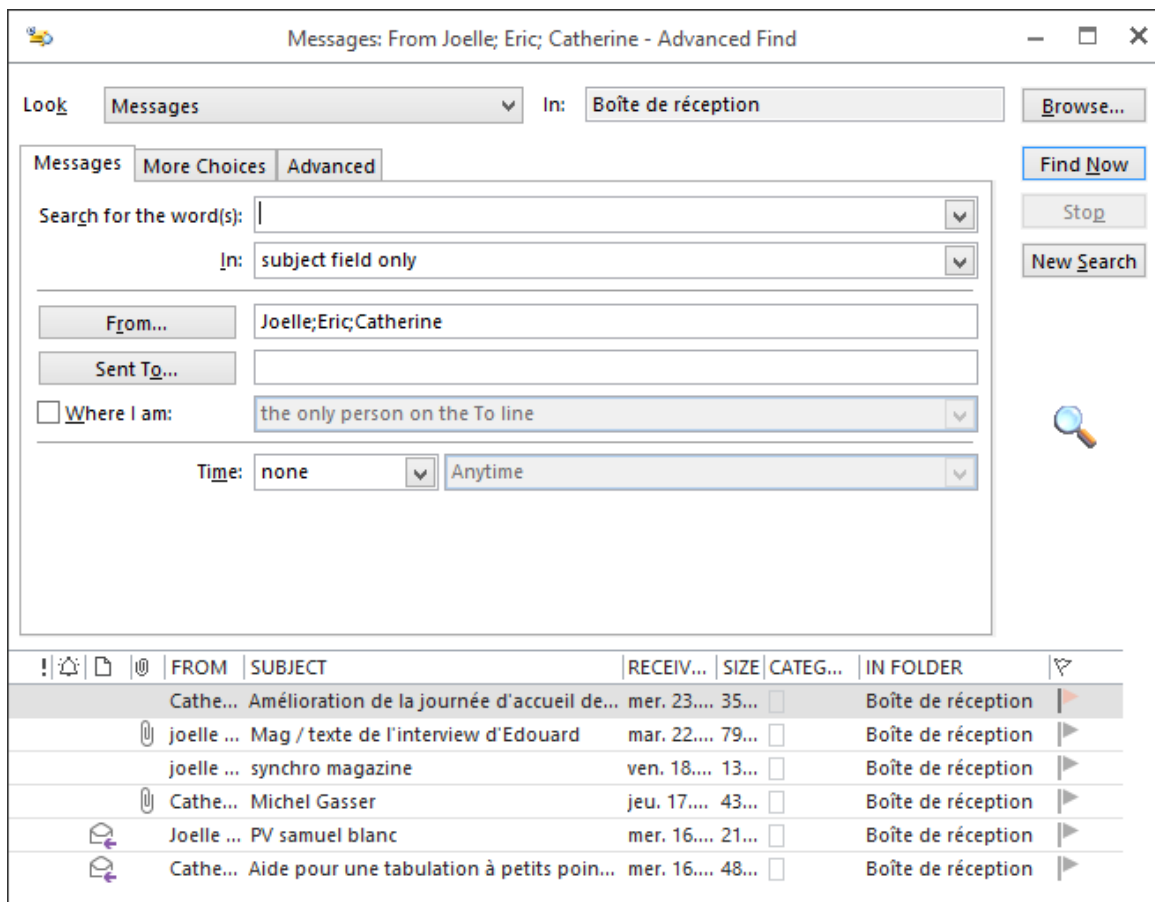
The OPTIONS group will give you the possibility to retrieve memorized searches and reuse them (the last 10 are displayed). The SEARCH TOOLS button is very interesting. It provides the following commands :

Choosing the account : here local + .pst local data file (used as an archive file)

or your mailbox



### Advanced search



\* The Subject field doesn't contain these first names ... Consequently « subject » means more « message header ».

The advanced search options can be very powerful, setting precise search criteria. Handy to run a simple search but with several criteria

### Outlook weakness for senders in this dialog box

You could be tempted to click on the FROM button to select your senders directly in your address book. The addresses are complete, it should be even more efficient, so you think ...

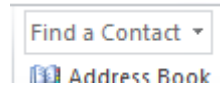
Often it is exactly the contrary that will happen ... no matching result ...

### Search Options

The dialog box that will be displayed corresponds to the Outlook OPTIONS (FILE Tab). You may set if the search should be run by default in the current folder or in all folders, if you wish that the matching items be highlighted and if yes in which colour etc ...

## 5.4 Searching a contact

For all components : HOME Tab – FIND Group displays at its right end a textbox where you can type the required name. The contact form will be displayed in a separate windows *without exiting the current component*.

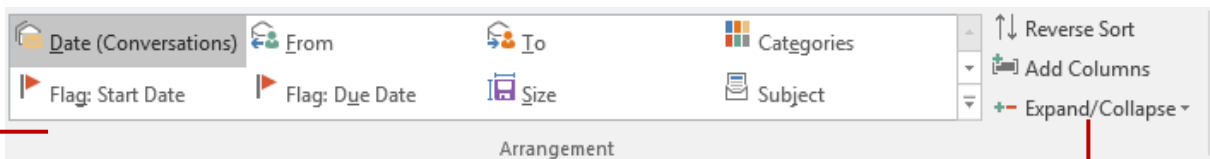


## 6 Common to all components : viewing tools

Outlook viewing tools are one of its major strong points and .... our weak one ! Each component will provide tools to sort, filter, arrange ... the displayed items.

### 6.1 Filtering, viewing and arranging

1. *Filters and views* in the HOME and VIEW Tabs
2. *Arrange* (essentially for table lists) with various grouping criteria and the possibility to show the result in groups. Usually in VIEW Tab.



At the bottom of the criteria gallery (here outside screen capture)



#### Reverse Sort

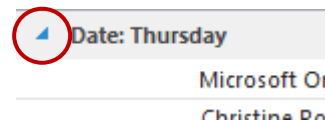
Sorting depends on the chosen criteria. Whatever your choice, the command revert the sort order (ascending or descending)

#### Add Columns

A dialog box will be displayed to add fields and arrange them (you can also right click a column head)

#### Expand/Collapse

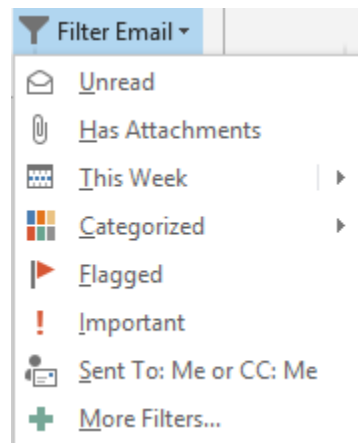
Corresponds to clicking on the triangle located before the group criteria



Interesting : the drop-down list provides an option to expand or collapse *all groups*.

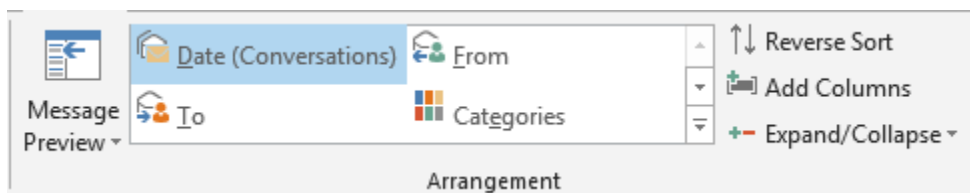
### 6.1.1 Mail

- HOME Tab – FIND Group



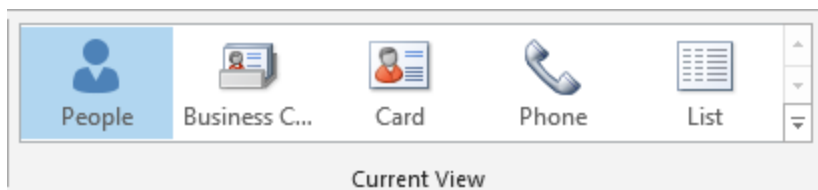
\* *More Filters* : turns on the search tools (and the corresponding Tab on the Ribbon)

- VIEW Tab – ARRANGEMENT Group

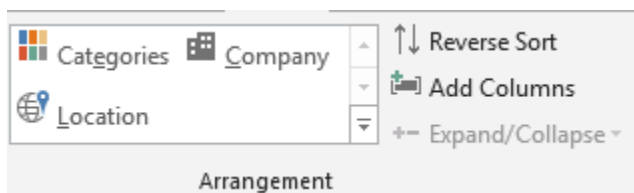


### 6.1.2 Contacts

- HOME Tab – CURRENT VIEW Group



- VIEW Tab – ARRANGEMENT Group

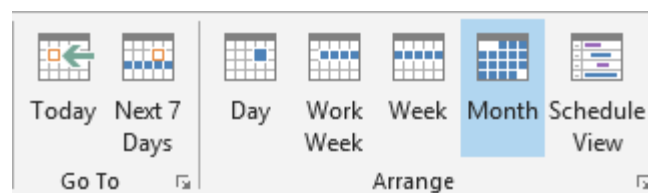


*Caution* : arranging by Categories, Company .. will be available only for table views (Phone or List).

### 6.1.3 Calendar

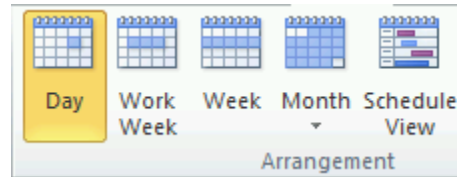
- HOME and VIEW Tabs : same buttons

HOME



*Dialog box launcher* : access to the OUTLOOK OPTIONS – CALENDAR Category  
*Schedule View* : « timeline view » for the calendar.

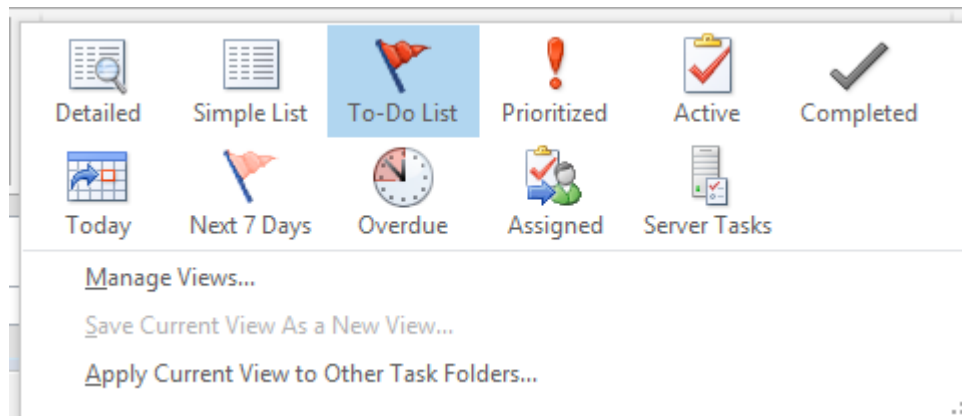
## VIEW



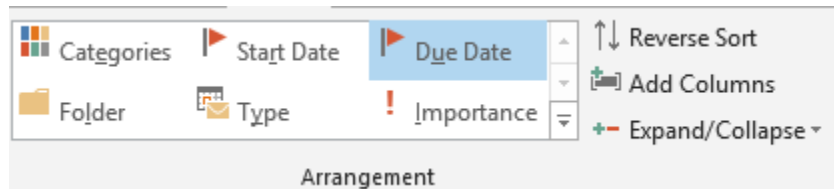
*Time Scale* : in DAY view – hourly slots of 60 min, 30 min, 15 min ...) and time zone  
*Overlay* : provided another calendar is active  
*Working Hours* : in SCHEDULE VIEW

### 6.1.4 Tasks

- HOME Tab – CURRENT VIEW Group

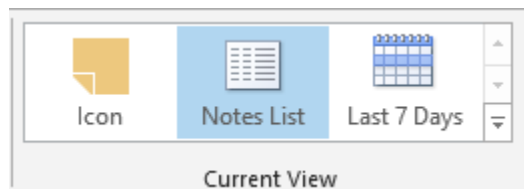


- VIEW Tab – ARRANGEMENT Group

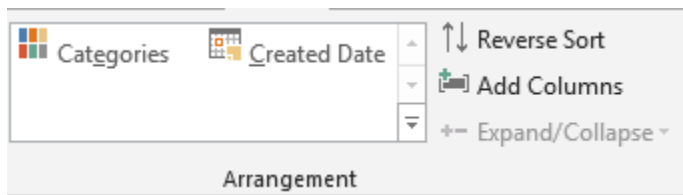


### 6.1.5 Notes

- HOME TAB



- VIEW Tab



## 6.2 Managing table views

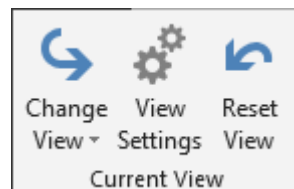
Managing the columns



- Delete** Click and drag the column head outside the fields row
- Width** Do as you would in Excel : point the separation line (at the right of the column head) and drag (double-click to auto-adjust)
- Change the order** Click and drag the column head, make sure to remain horizontal while dragging and release at required position (red triangle)
- Sort** Click on the column head. In turn you sort in ascending and then in descending order
- Add** Right click the column head and option FIELD CHOOSER

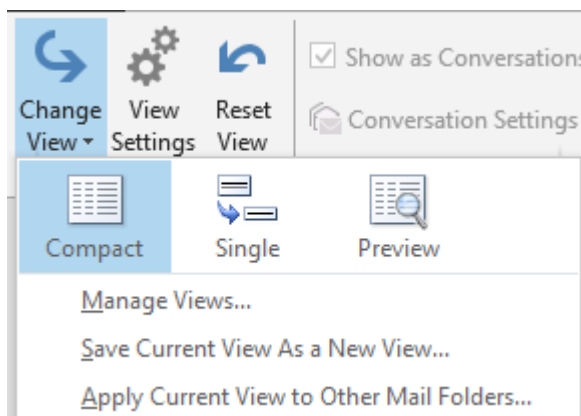
## 6.3 Managing views

- VIEW Tab – CURRENT VIEW Group



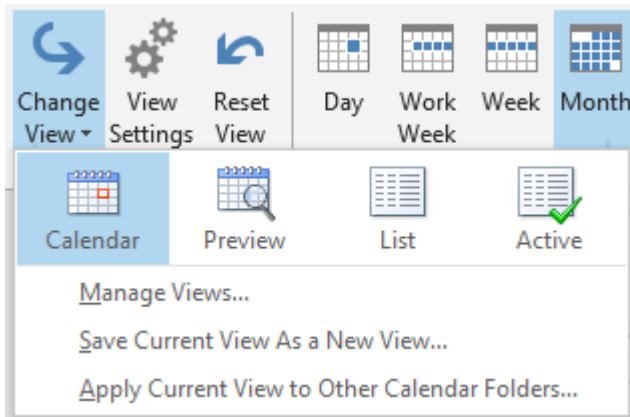
### 6.3.1 The CHANGE VIEW Button

Same preset views but adds some additional settings. Two examples :



*Preview* : displays the first lines of unread messages





*Active* : table list but omitting the items before today. Recurrent items created before today but spreading beyond will be displayed.

*List* : table list. Handy to remove unwanted holidays for a give country. Combine with a grouping by categories.

**Manage Views**

To copy, edit a view ...

**Save Current View ...**

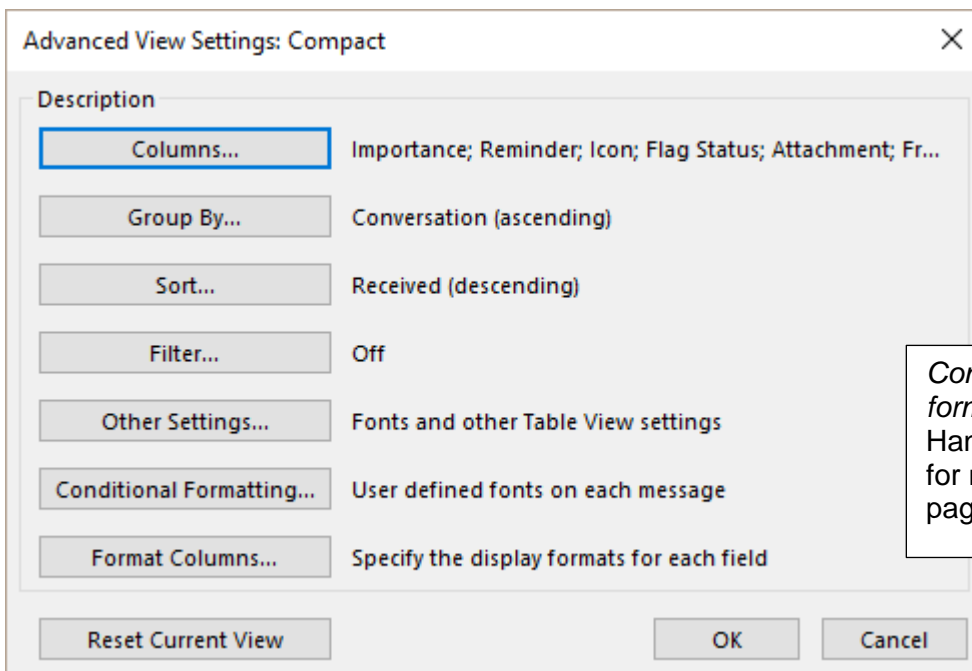
To save as a view the active settings

**Apply Current view ...**

A dialog box will be displayed to select the folders to which the view should be applied

**6.3.2 The VIEW SETTINGS button**

A dialog box displays all the settings view. A wide choice ...



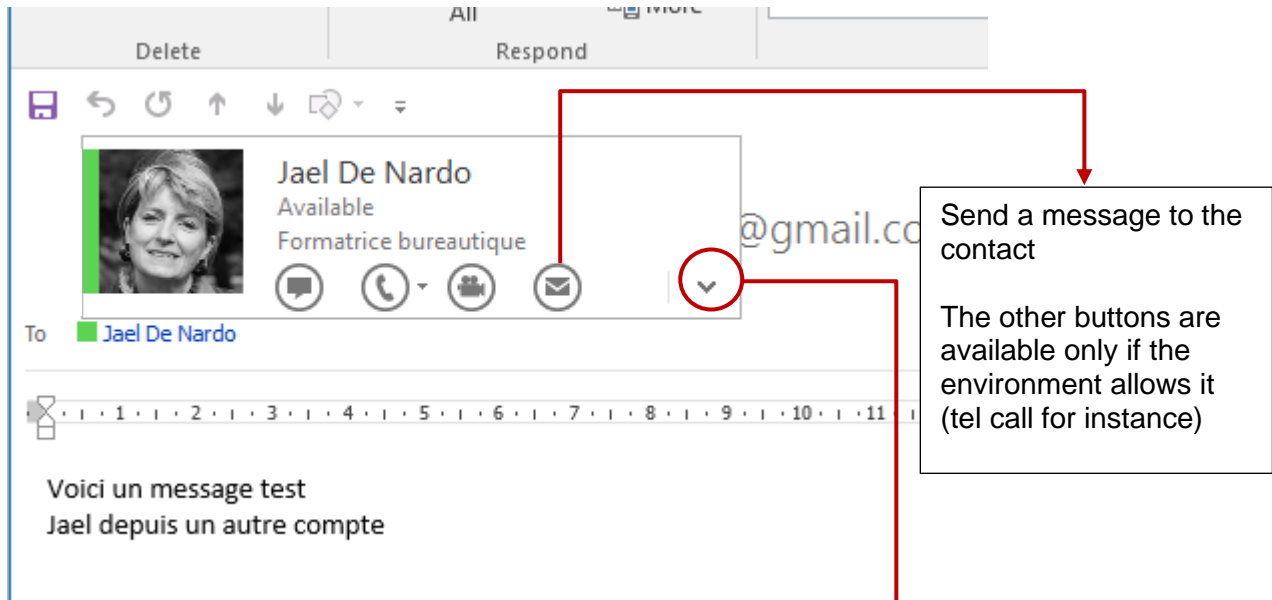
*Conditional formatting* : Handy when used for messages. See page 60

**6.3.3 The Reset View button**

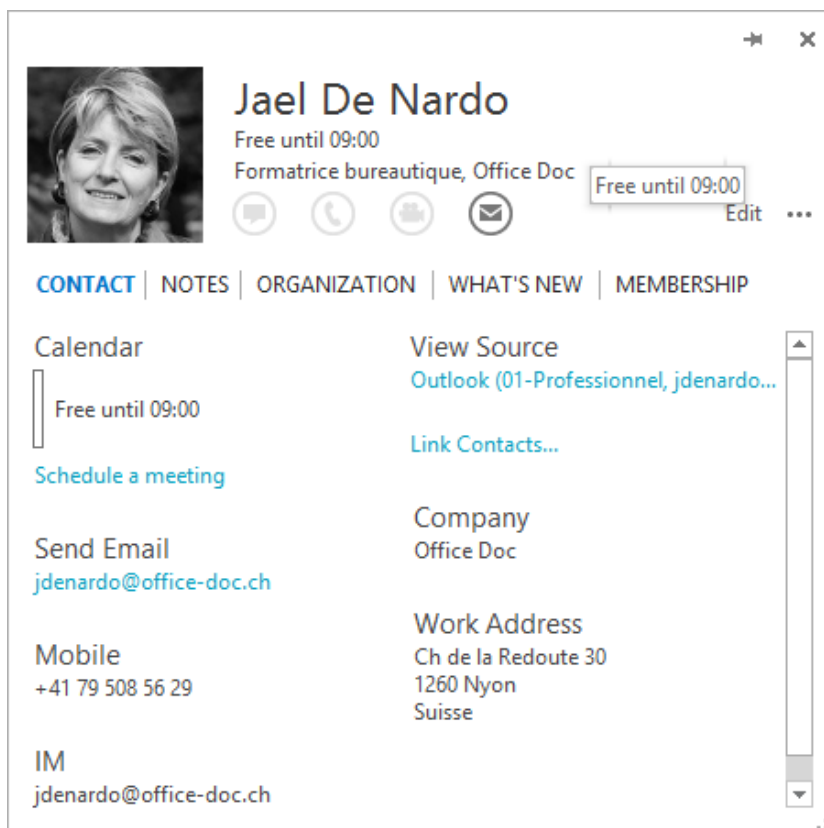
You are prompted to confirm

## 7 Common to all components : the contact card

Pointing an email address in a message, a contact, a meeting ... displays a small window indicating the contact information and allowing actions such as sending him / her a message, creating a new contact card, preparing a meeting ...



Expanding the card



If you click on the pin icon, it becomes a window that you can keep in the background.

## 8 Common to all components : assigning a category

You can add categories to any Outlook item.

*Purpose of categories* : each component provides a *By Category* view

Example in the Calendar :

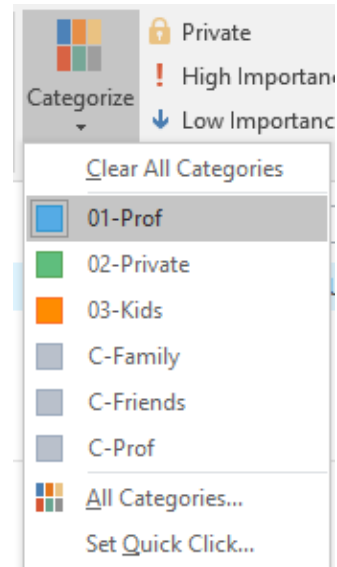
- All components except Mail:

When creating the item : APPOINTMENT, TASK ....  
Tab – TAGS Group

- All components : selecting one item

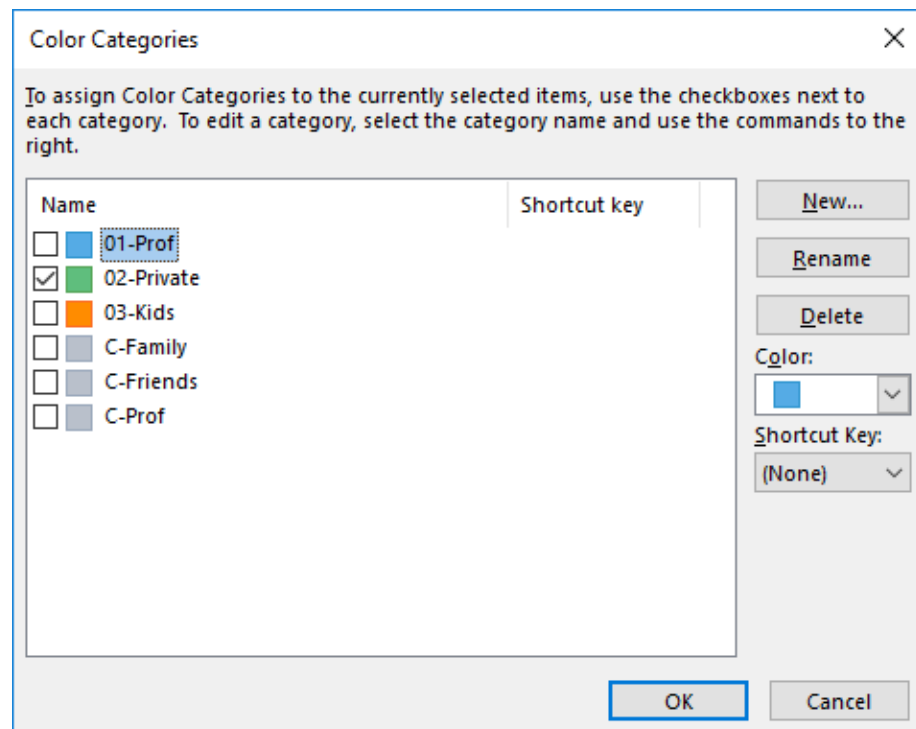
HOME Tab or CALENDAR TOOLS Tab – TAGS  
Group

*The list is the same whatever the component and is totally personal*



All Categories :

(25 colors)



*Screen capture* : as the list of categories works for all Outlook components, I decided to put numbers and letters in front of them to make two groups, one with colors for calendar items and others with no color to sort out contacts ...

## 9 The FILE menu or BACKSTAGE View and the default Outlook options

The usual commands but here after some more specific to Outlook :

### 9.1 INFO : account, cleanup, rules and alerts

## Account Information

jdenardo@office-doc.ch  
Microsoft Exchange

+ Add Account

**Account Settings**

### Account and Social Network Settings

Change settings for this account or set up more connections.

- Access this account on the web.  
<https://outlook.office365.com/owa/office-doc.ch/>
- Connect to social networks.

**Change**

**Automatic Replies**

Use automatic replies to notify others that you are out of office, on vacation, or not available to respond to e-mail messages.

8.69 GB free of 10.2 GB

**Cleanup Tools**

### Mailbox Cleanup

Manage the size of your mailbox by emptying Deleted Items and archiving.

49.4 GB free of 49.5 GB

**Manage Rules & Alerts**

### Rules and Alerts

Use Rules and Alerts to help organize your incoming e-mail messages, and receive updates when items are added, changed, or removed.

#### *Add Account*

Exchange account, POP / IMAP (account linked to an ISP (Internet Service Provider) such as @sunrise.ch, @bluewin.ch – or a free account such as hotmail.ch, gmail.com)

#### *Account Settings*

You can check the .pst path for a *local Outlook account*, the .ost path for an *Exchange hosted mailbox*, the path of your archive .pst file, you can manage your address books (sort order), how you want your calendar to be published and so on

### *Automatic Replies*

New name for the Out of Office Assistant. Voir page 50


*Mailbox Cleanup* : check the size of your Mailbox folders, empty the Deleted Items folder (Bin), run the auto-archive command (either according to the default settings set in the options or by manually deciding which folders and up to which date).

\* *With a fine line border* : quota slider (only with Exchange)

*Rules and Alerts* : rules to manage messages when they arrive in the Inbox (or less common when they are sent) : specific alert, automatic move to a specific folder ...). The command can also be accessed through its corresponding button in the HOME Tab.


## 9.2 OPEN AND EXPORT

# Open

 **Open Calendar**  
Open a calendar file in Outlook (.ics, .vcs).

 **Open Outlook Data File**  
Open an Outlook data file (.pst).

 **Import/Export**  
Import or export files and settings.

 **Other User's Folder**  
Open a folder shared by another user.

*Open Calendar* : to read calendar files whose structure is different from Outlook but follows international standards (such as iCal for example).

*Open Outlook Data File* : personal archive file – extension is .pst. These files are usually used as “archives”. You create as many subfolders as you require and you drag old items to your archive folders in order to remove them from your main mailbox.

Note :you create the archive file in the HOME Tab

*Import or export Outlook item to other programs such as Excel or Access.*

### *Other User's Folder*

Concerne le partage. Voir page 112

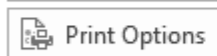
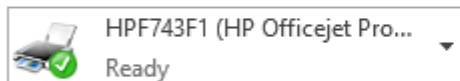
# Print



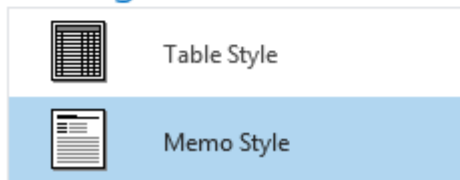
Print

Specify how you want the item to be printed and then click Print.

## Printer



## Settings



### Jael De Nardo

From: Jael  
Sent: me  
To: 'djc'  
Subject: RE  
Attachments: JK

Hello,

Juste fissa fissa avant de boucler l'ord  
Je n'ai pas réussi à venir lundi et je le  
bien que son intervention à la SGP sei  
Voici le texte corrigé mais un peu en f  
Le texte est très dense, j'ai mis des re  
texte est long, long .... je me demand

Bref  
Cette fois je me sauve. Diane demain  
Biz  
Passe le fichier à Catherine de suite  
J.  
-----Message d'origine-----

### *Table Style*

Printing the component items : all messages or contacts for example.

### *Memo Style*

Printing the active item : a message for example

### *Print Options*

Margins, headers, orientation ...

# Account

## User Information



Jael De Nardo  
jaeldenardo@hotmail.fr

- [Change photo](#)
- [About me](#)
- [Sign out](#)
- [Switch Account](#)

### Office Background:

Spring ▾

### Office Theme:

Dark Gray ▾

### Connected Services:



Jael De Nardo's OneDrive  
jaeldenardo@hotmail.fr



YouTube  
YouTube user

[Remove](#)

[Add a service ▾](#)

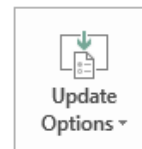
## Product Information



### Product Activated

Microsoft Office Famille et Petite Entreprise 2013

This product contains



### Office Updates

Updates are automatically downloaded and  
Version: 15.0.4605.1003



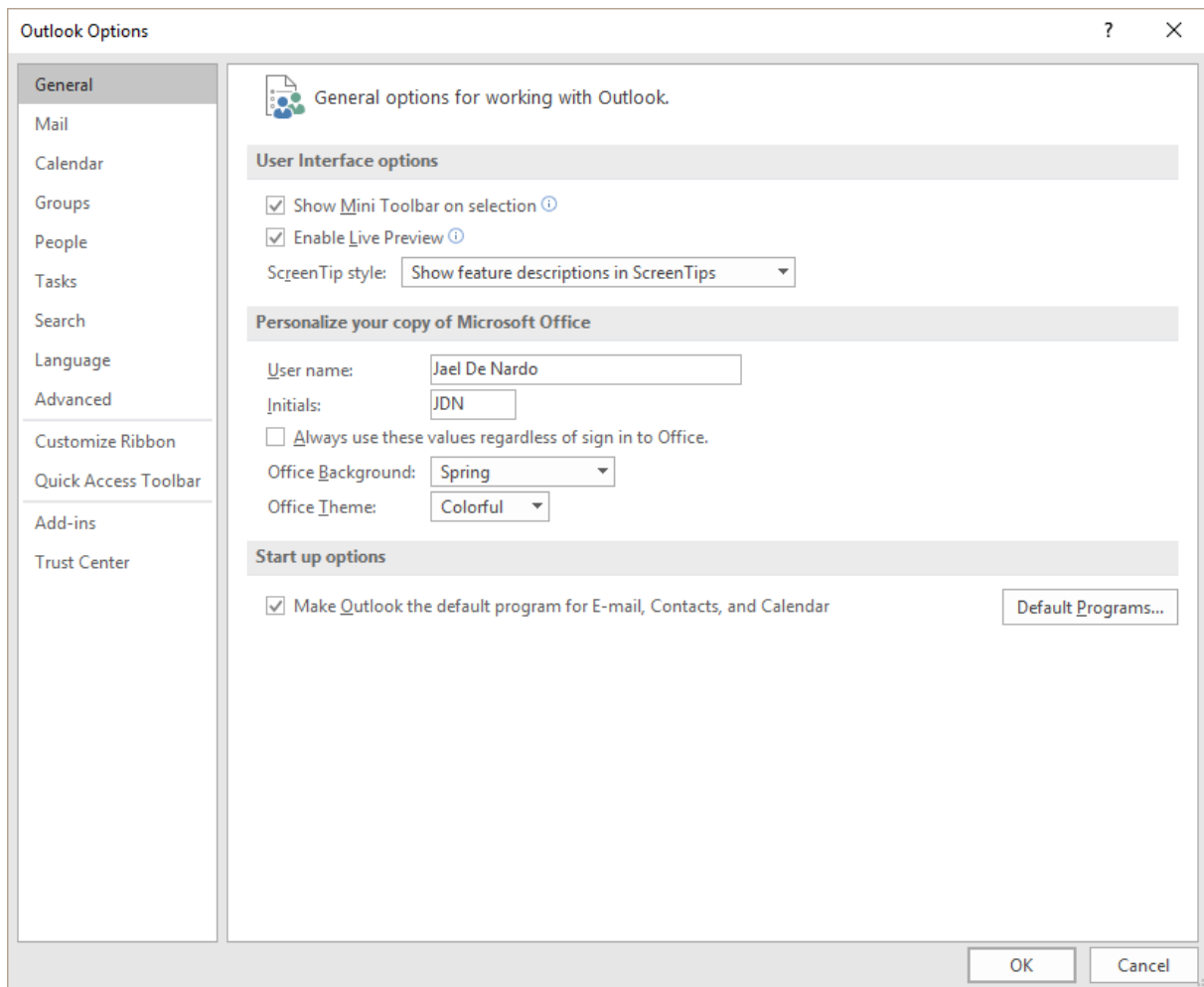
### About Outlook

Learn more about Outlook, Support, Product information.

Your identity and various information about you, some esthetical settings for Office, any special added services, legal information about your Office licence and so on.

The information can vary according to your environment (local at home, network at your work).

## 9.5 OPTIONS



Impossible to extensively cover all options so many they are ... Consult the program options when you have a problem before calling the helpdesk ... And be reminded that the options provide useful customizing options ...

Some examples are mentioned in the chapter about *Mail* and *Calendar*



---

# OUTLOOK TODAY

---

Very few users like it ....

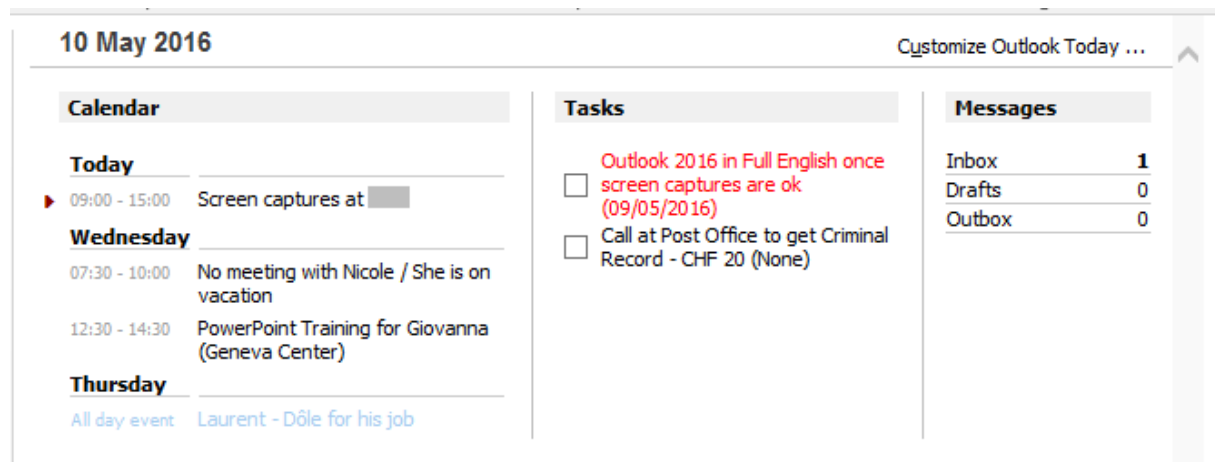
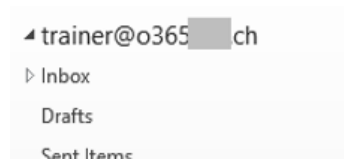
Microsoft Outlook Today gives you a snapshot of your day. It lists how many new e-mail messages you have, your appointments for the week, and your tasks

## 1 Default view

---

Click on the “root folder”, usually the one named “MailBox X” :

(in the screen capture on PERSONAL FOLDERS)



The screenshot shows the Outlook Today dashboard for 10 May 2016. The dashboard is divided into three main sections: Calendar, Tasks, and Messages. The Calendar section shows a timeline for the day, with a red arrow indicating the current time (09:00 - 15:00) and a grey bar representing a screen capture. The Tasks section shows two tasks: one in red text indicating a deadline (Outlook 2016 in Full English once screen captures are ok (09/05/2016)) and one in blue text (Call at Post Office to get Criminal Record - CHF 20 (None)). The Messages section shows a summary of unread messages in the Inbox (1), Drafts (0), and Outbox (0).

Section	Item	Value/Status
Calendar	Today	09:00 - 15:00 (Screen captures at)
	Wednesday	07:30 - 10:00 (No meeting with Nicole / She is on vacation)
		12:30 - 14:30 (PowerPoint Training for Giovanna (Geneva Center))
	Thursday	All day event (Laurent - Dôle for his job)
Tasks	Outlook 2016 in Full English once screen captures are ok (09/05/2016)	Late (Red)
	Call at Post Office to get Criminal Record - CHF 20 (None)	Normal (Blue)
Messages	Inbox	1
	Drafts	0
	Outbox	0

The following items are displayed :

Appointments in your Calendar

(No category color – if it is an event, it is displayed in blue whatever its source category color)

Tasks (in red = late)

Messages in the three default mailing folders (in bold = unread messages)

## 2 Customizing

**Customize Outlook Today** Save Changes Cancel ^

---

**Startup**  When starting, go directly to Outlook Today

---

**Messages** Show me these folders:

---

**Calendar** Show this number of days in my calendar  ▾

---

**Tasks** In my task list, show me:  All tasks  
 Today's tasks  
 Include tasks with no due date

Sort my task list by:  ▾ then by:  ▾

Ascending  Descending       Ascending  Descending

---

**Styles** Show Outlook Today in this style:  ▾

Style	Preview
Standard	
Task List	
Calendar	
Messages	





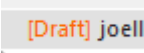








---

# MAIL

---

## 1 Icons that may be placed in front of messages

Here below some common icons and their meaning :

	The envelope is displayed with the Outlook icon to inform you that one or more messages have just arrived
	Message to which you have replied.
	Message that you have forwarded
	System message : here notification for a message that was delivered.
	Draft information in the Inbox folder
	Draft icon when the message has been saved (either automatically or manually) in the Draft folder
	Outbox for instance : message ready to be sent
	Message importance (set by the sender) : high, low.
	Sent message : flag for your own follow-up
	Received message : the sender has added a flag for you. You can accept it to create a task in the To-Do Bar or leave it
	Attachment (a file, another Outlook item ...).
	Meeting request.
	Post inside a given folder (will let you put "a message" into one of your inbox folder without having to send it to yourself)

## 2 Creating new items

### 2.1 Creating a new simple message

- HOME Tab – NEW Group



#### 2.1.1 Message recipients

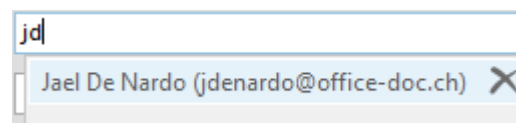
##### **To, Cc or Bcc recipients**

The standard To and Cc buttons giving access to  
- *The Global List (Exchange) and its distribution lists*  
- *Yours contacts and your custom distribution lists*

Add the Bcc button(Blind carbon copy)  
OPTIONS Tab – SHOW FIELDS Group

##### Memorized email addresses

When you type the beginning of an email address, Outlook automatically completes it with matching suggestions from previously used addresses. But sometimes it is the best way to make errors carry on ! If necessary click on the cross to delete the entry :



##### **MESSAGE Tab – NAMES Group**



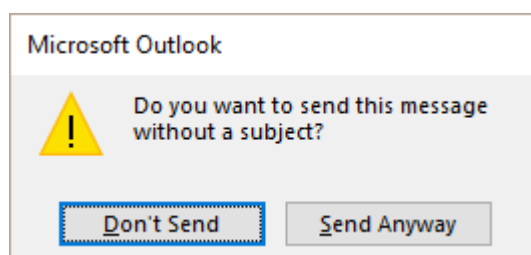
Type the beginning of an email address and then click on this button to get a list of matching names (from the Global List or your contacts). If there is more than one match, a dialog box will be displayed to select the required recipient.

Keyboard shortcut : CTRL + K

#### 2.1.2 Subject

Make sure to type a short but very clear text as this can be used by the recipient or yourself to search, set a task or sort out ...

If you leave the subject line empty a dialog box will warn you about it :



### 2.1.3 Word is the default EDITOR – Spell & Grammar check

The Ribbon options provide all the necessary options to format the message body text. You can use all the Word commands (create a table, insert a picture ...). You will find standard commands in the MESSAGE Tab and additional ones in the FORMAT TEXT Tab.

Spell check is automatic (the grammar check must be turned on in the Outlook options).

Run the check manually through REVIEW Tab – PROOFING Group – SPELLING & GRAMMAR Button.

*Important :*

- ❶ Word does not manage animated gifs or Flash objects. Consequently do not be surprised to see a still picture instead.
- ❷ Do not forget that a message containing Word items (tables, pictures ...) REMAINS A MESSAGE. A WORD ATTACHEMENT is preferable if you think the recipient will need to fully edit and retrieve the contents.

**Note :** test with a table included into a message but read on the user's iPhone : fine but make sure to set a slightly narrower width than the default width assigned by Outlook

### 2.1.4 Inserting a file, an Outlook item

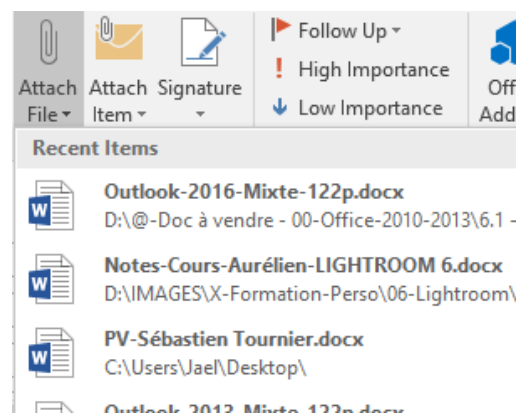
#### MESSAGE Tab – INCLUDE Group

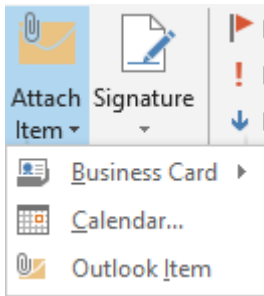


Caution with files that Outlook recognize as potentially harmful : .exe, .bat, .vbs, .js, .pst .... You can send them but the recipient will not be able to open them ...

#### 2016 Join a recent file

Outlook 2016 memorizes the files you are working with (Office files or others such as PDF files for instance) :





### *Business card*

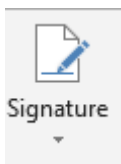
A small virtual business card (a picture) is inserted but also a .vcf file. It is the contact form turned into an attached file. All mailers can read it, even an iPhone. The recipient can create a contact easily by simply opening & saving it (automatically saved in Contacts).

### *Calendar – Outlook Item*

To add one or more Outlook items to the current message. For example one or more messages – which is far better than forwarding ....

## 2.1.5 Inserting a signature

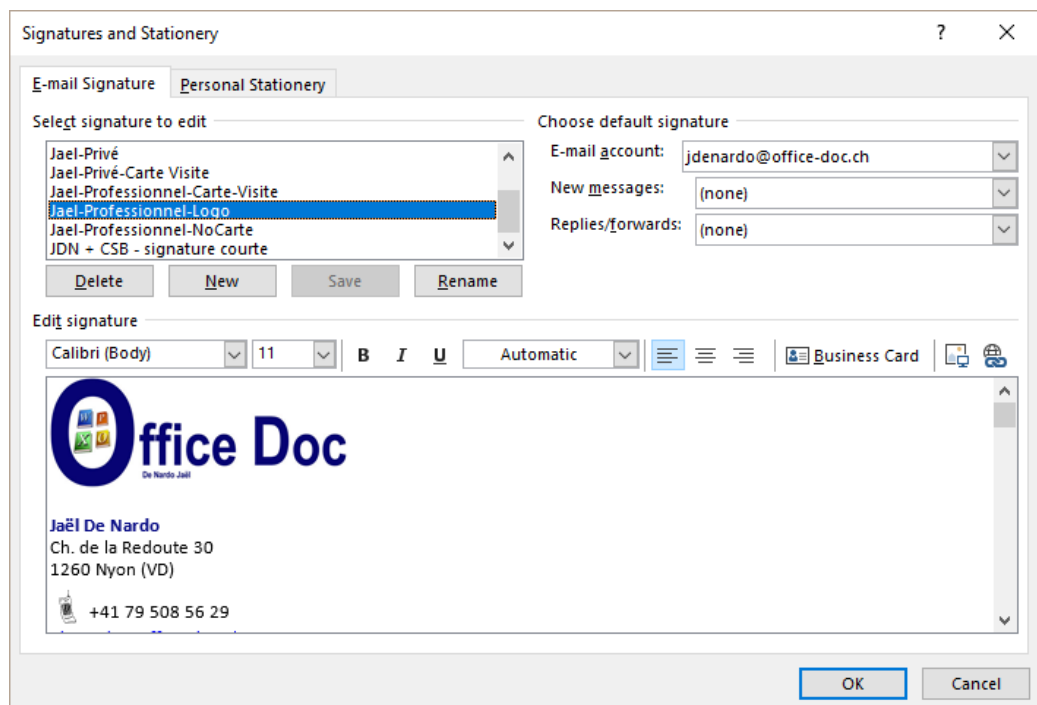
### **MESSAGE Tab –INCLUDE Groupe or FILE – OPTIONS – MAIL Category – SIGNATURES Button**



Drop-down list and optin SIGNATURES

You may prepare more than one signature.

You can set which signature will be the default one – and for which account. The text section works like a “mini-Word”. You can format the text, add a picture file or a hyperlink ...



### *Business Card*

A specific contact or yourself as a contact can be added to your signature. The recipient will receive a virtual business card in the body text as well as an attached Vcard file (.vcf).

### 2.1.6 Advice on security

*If you work with Exchange Server (and not with an ISP)*

These alerts can be generated by actions such as forgetting to fill in the subject of your message, clicking on the Reply to All when there is long list of recipients, or when you try to send a message to a user that has left the company (invalid address) or to a user who is recognized as Out of the Office.

This functionality will be active provided the Exchange administrator has turned it on. Some settings can then be managed in through FILE – OPTIONS – MAIL Category – Added new section : MAIL INFO (\* the no object warning message is not part of those options)

### 2.1.7 Sending or saving as a draft

*Send* : click on the SEND button or CTRL + ENTER

*A copy of the message is automatically placed in the Sent Items folder*

*Create a draft* : simply exit the message and accept saving when you are prompted to do so. A draft is automatically created. You can later on finish it and send it (double-click on it)

## **2.2 Pictures sent through Outlook (and their weight)**

### 2.2.1 Why is it so important ?

Mail servers usually set size limits to messages and can block incoming or outgoing “heavy” messages. The message will not be delivered and returned to you.

Administrators also set limits to the size of your mailbox. A copy of each message that you send goes into the Sent Items folder ...

To test the weight of a message before you send it : click on the SAVE button and check its size in the DRAFTS folder.

### 2.2.2 Dimensions and size of pictures BEFORE you insert them into the message

Modern cameras often create photos of high quality, compressed to jpg or png format, but with huge dimensions (more than the largest screen). An example : 4000x3000.

Advice :

- ✓ Use a program (Windows or other) providing commands to reduce the picture size.
- ✓ Avoid non compressed formats such as .tif or .bmp. Prefer standard compressed formats such as .jpg, .png, .gif.

### 2.2.3 Managing the size of a picture you have inserted as an attached file

- Insert the required picture file(s)
- Without exiting the message, switch to Backstage view (click on the FILE tab)
- INFO Section

# Great picture

## Image Attachments

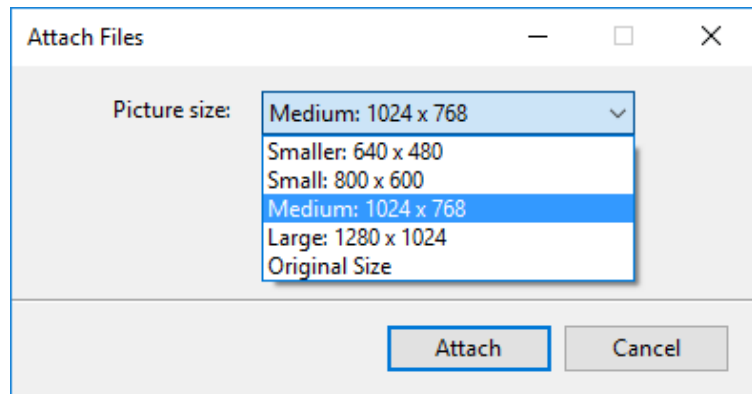
Some recipients may not receive this message because of image attachments. Resizing large images may help the message get delivered. Resized images will be a maximum of 1024x768 pixels.

- Resize large images when I send this message.
- Do not resize images.

- The reduction will be applied when you send the message. (the tested picture was 4 Mb heavy and was reduced to 133 Kb). *Check : in the Sent Items folder.*

### 2.2.4 Special Windows : managing the size in the Windows Explorer

- Windows Explorer: right click the picture file(s)
- SEND TO – MAIL RECIPIENT



- Reduction takes place (but it does not affect the source files). A copy of the file(s) is attached to a new Outlook message.

Note : once the message has been created, the INSERT – PICTURE does not allow you to *insert and compress at the same time*. (the SEND TO command is listed but it generates a conflict with the still opened insert dialog box).

### 2.2.5 Inserting a picture into the message body text

*Good to know* : Outlook automatically compresses the picture. Test : 153 Ko for a source image of 5.74 Mb. But Outlook does not tell you about it. Check the size in Sent Items

### 2.2.6 Inserting a screen capture into the message body text

- From a new message, a response ...
- INSERT Tab – ILLUSTRATIONS Group – SCREENSHOT Button
- A list of underlying windows is displayed : simple click to capture. You may also capture a region of the window located under the Outlook window. The capture is automatically inserted into the body text, at the insertion point.

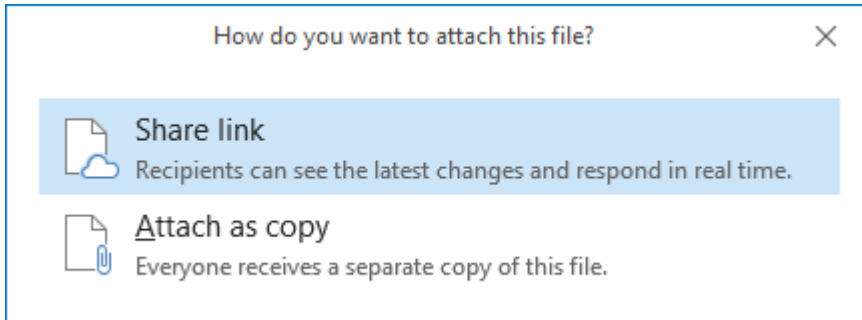
The weight is relatively light : in the test, the captured Word window was 300 Kb in size.



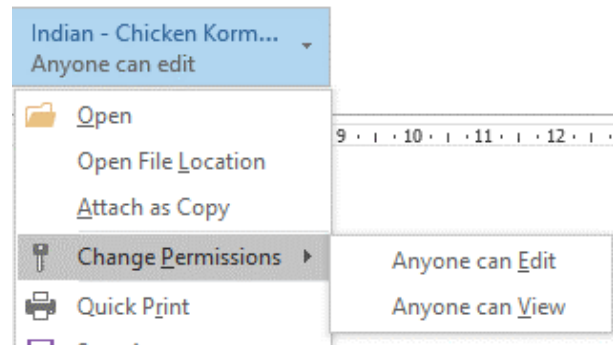
## 2.3 For OneDrive users : insert as a link

- Create a new message in Outlook
- Click on the usual button to attach a file
- Select the OneDrive file

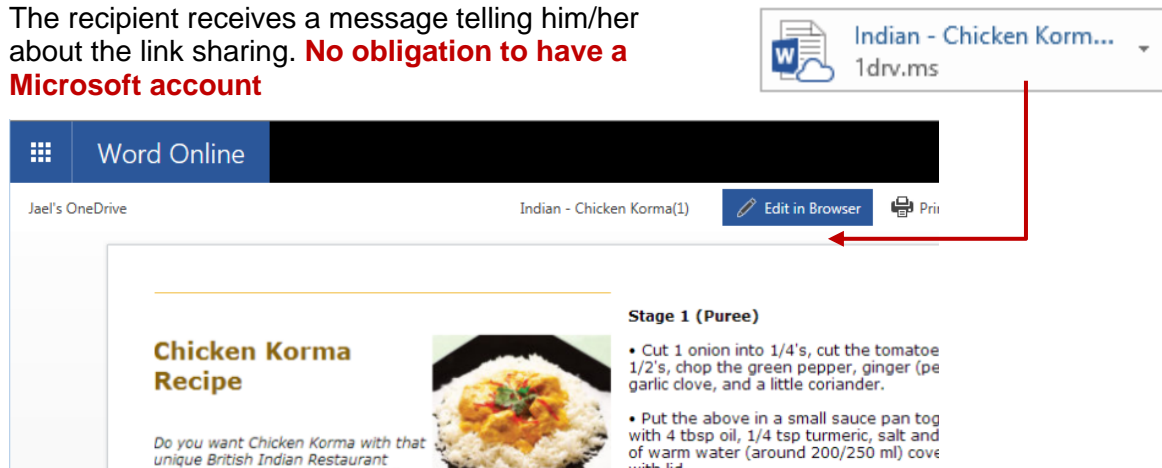
Outlook prompts you to set whether it will be a link or a copy :



By default the right is set on : ANYONE CAN EDIT but this can be changed :



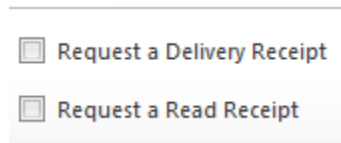
The recipient receives a message telling him/her about the link sharing. **No obligation to have a Microsoft account**



The file is opened in WORD-EXCEL ... ONLINE inside youR browser to read it. If you need to edit the content, click on EDIT IN BROWSER and the corresponding WEB APP (sort of mini Word-Excel ...) will be launched.

## 2.4 Delivery and Read Receipt

### OPTIONS Tab – TRACKING Group



The Delivery Receipt is sent by the server receiving the message.

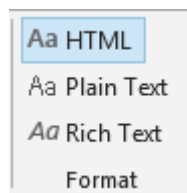
The Read Receipt is sent when the recipient reads the message.

- **Read Receipt** : the recipient is informed that the sender requests a receipt and he/she can accept or reject it. Consequently, if you do not receive a Read Receipt, this does not necessarily mean that the recipient has not read the message ...

*A receipt set by default for all messages : not really recommended but can be set in the Outlook options.*

## 2.5 The message text format

### FORMAT TEXT Tab – Groupe FORMAT

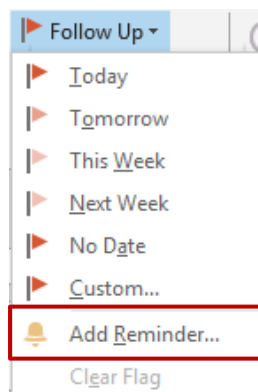


To change the text format for THIS message  
By default, the standard is HTML (all Word commands)

- HTML** Attributes such as bold, italic ... inserting decorative horizontal line, adding a wall paper to messages ...
- Plain Text** No format (no bold, no italic ...).
- Rich Text** Some formatting attributes such as bold, italic ...

## 2.6 Adding a flag

### MESSAGE Tab – TAGS Group




Flagging is more common for received messages but you can add a flag to a message that you send.

Ideal : drop-down list of the button and option CUSTOM

**Custom** ✕

Flagging a message for yourself creates a to-do item that reminds you to follow up. After you follow up on the message, you can mark the to-do item complete. Flagging a message for the recipient sends a flag and a reminder with your message.

**Flag for Me**


 Flag to

Start date

Due date

Reminder

**Flag for Recipients**

 Flag to

Reminder

## FLAG FOR ME



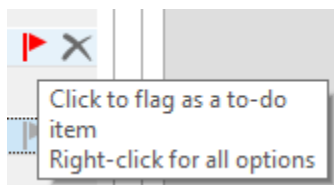
The message in the Sent Items folder displays the usual flag icon at its right far end but also one at its left. Click on the left icon to turn the message into a task and display it in the To-Do Bar.

## FLAG FOR RECIPIENTS (by default not active)

The received message will display at its right end an icon giving the recipient the opportunity to turn the message into a task in the To-Do Bar.



When you point this icon, it turns into a standard one and works like a normal flag :

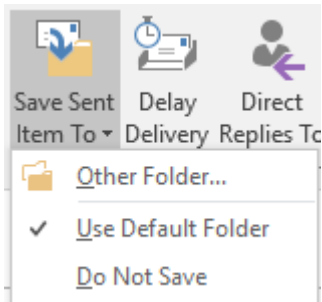


- 🔔 If the due date has been set for a date in the past (even if it is just a few minutes), the message will be considered as being « late » and will be displayed in red

And if you have added a reminder to the flag : the message arrives in the recipient Inbox with a reminder window popping up automatically. Use this with moderation ...

## 2.7 Save Sent Items To

### OPTIONS Tab - MORE OPTIONS Group

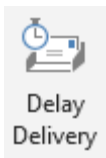


By default a copy of each sent message goes into the SENT ITEMS folder

You can set a different choice for a specific message. Handy for totally unimportant messages and this helps to keep the Mailbox to a decent size.

## 2.8 Delay Delivery

### OPTIONS Tab - MORE OPTIONS Group



The message is prepared, « sent » (you have clicked on the SEND button) but the server will actually send it at the specified date and time.

## 2.9 Direct Replies To

### OPTIONS Tab - MORE OPTIONS Group



At times it can be handy to set that the reply should be addressed to another user.

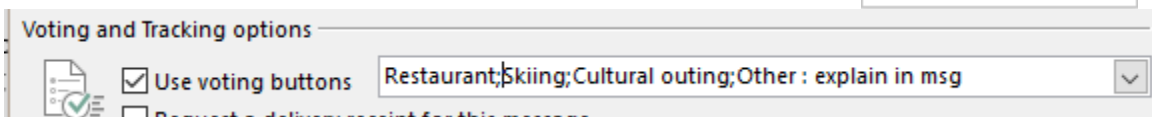
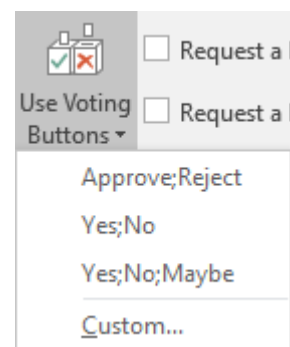
(It is a good idea to inform the recipient in the message body text or he/she might think it is an error and set the message back to the source sender).

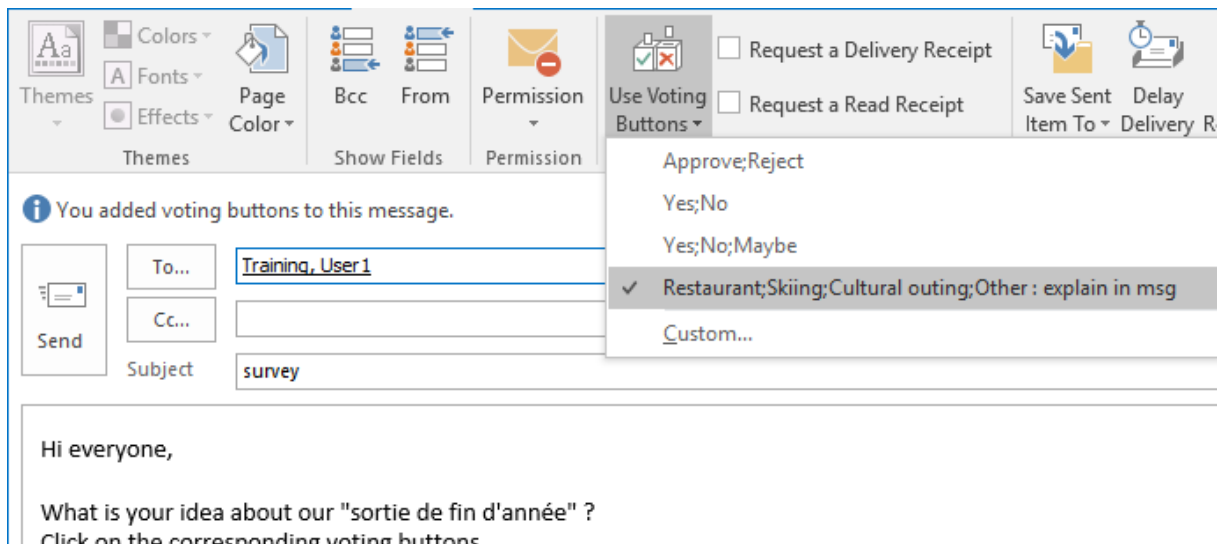
## 2.10 Creating voting buttons

### OPTIONS Tab – TRACKING Group

It is the Outlook version of the famous “Doodle” !

Choose from the preset suggestions or type your own text. (CUSTOM)

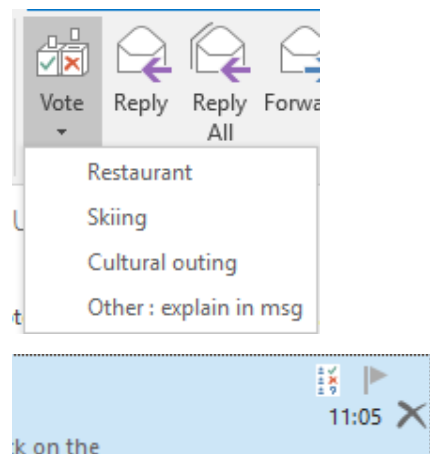




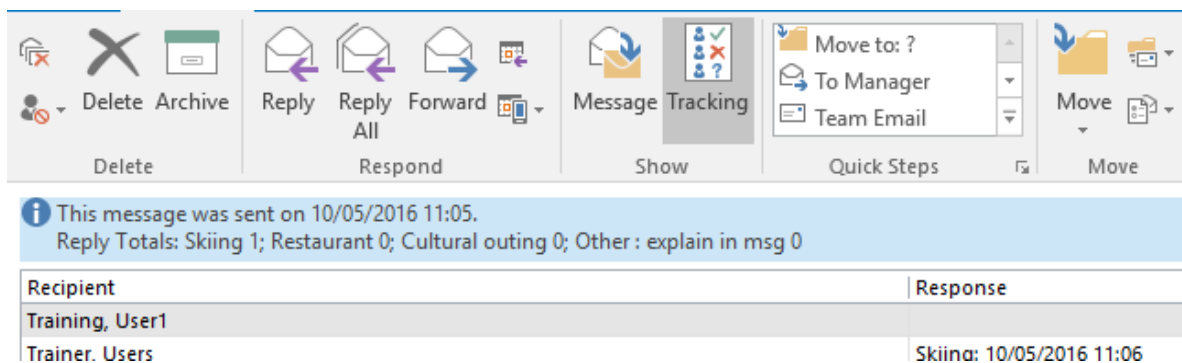
The recipients make their choice

Caution : users often do not see that the button has a drop-down list of choices. Mention it in the message body text

As soon as one person has answered, the source message displays the tracking icon in front of it



When you open the message, the tracking button is displayed on the Ribbon. Click to display to manage the follow-up :

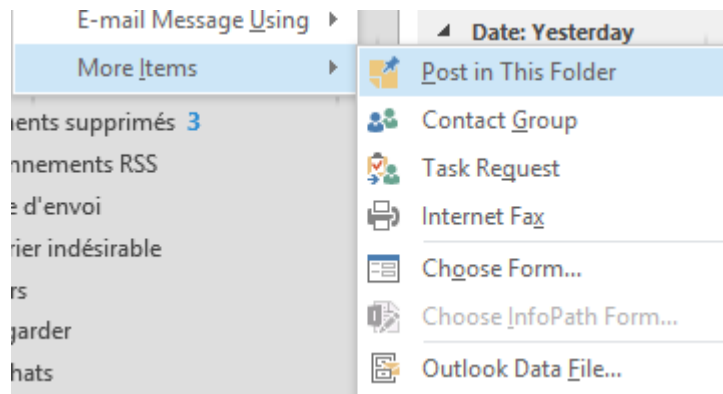


**Reply** : one response only, no multiple selection. If you re-reply later on and change your idea, the tracking will show your last choice.

**Note** : the voting buttons are a « gadget » specific to Outlook, usually ignored by other mailers. We did a test with a message including voting buttons but read on the user's iPhone : nothing !

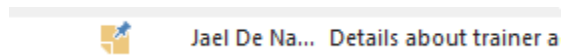
## 2.11 Creating a Post

- HOME Tab – NEW Group – NEW ITEMS Button



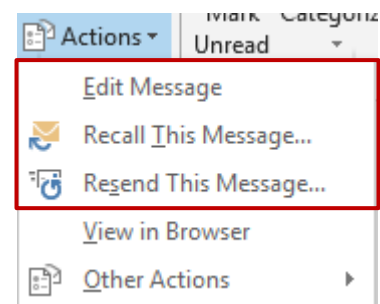
### Post in This Folder

To create a sort of « note » that is neither a message, an appointment, a note ... but that stays in the active folder.



## 2.12 Modifying / Recalling / Resending a message

- Make sure to edit the sent message (double-click)
- MESSAGE Tab – MOVE Group

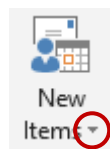


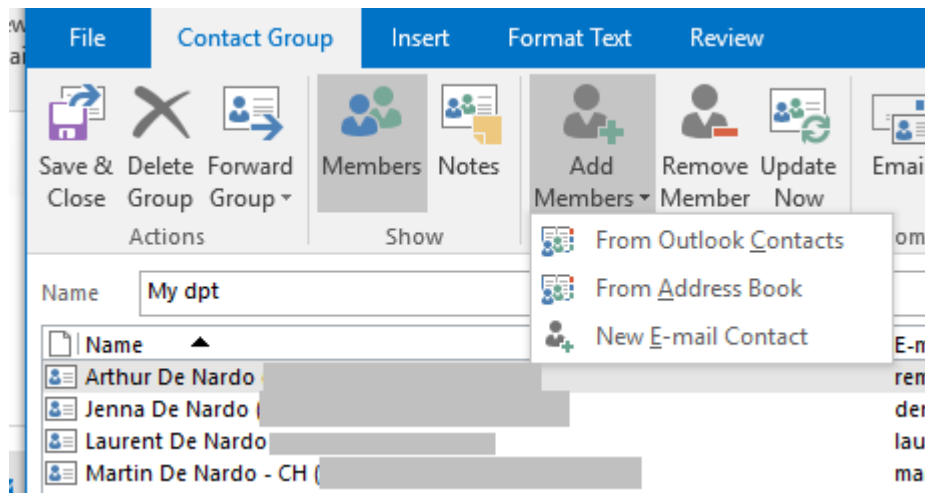
☛ The message cannot be recalled by its sender if it has been opened and read or moved to another folder by the recipient.

✎ Advantage of RESEND over FORWARD : the initial recipient address is not removed, no FW in the subject line.

## 2.13 Creating a distribution list (now called Contact Group)

- HOME Tab





Name your list and select its members.

- FROM OUTLOOK CONTACTS : from your personal Outlook contacts
- FROM ADDRESS BOOK : from the Exchange Global List
- NEW E-MAIL CONTACT : an email address typed manually and related to no existing contact.

Interesting : if there is a change in a source contact, click on the UPDATE NOW button to update the list.

Storage address : the list is saved in your main CONTACTS folder.

Other possibility to create the list : HOME Tab – FIND Group – ADDRESS BOOK Button – FILE – NEW ENTRY – NEW CONTACT GROUP

### Message sent to the list

Select the list as your recipient



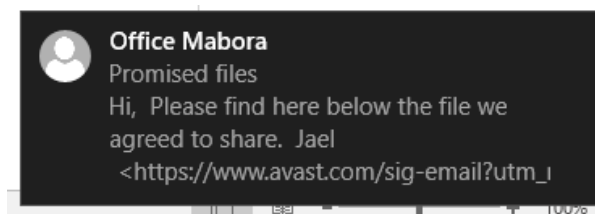
The plus symbol in front of the list name can be clicked to expand the list and replace it with the members addresses. A warning message will inform you about this. This can be handy to remove a member for this specific message without modifying the list itself.

## 3 Incoming mail

### 3.1 Desktop Alert

When you receive a message, an alert such as the one shown in the screen capture below will be displayed for a few seconds :

 This alert will be displayed whether you are in Word or Excel ...



You manage this function in FILE – OPTIONS – MAIL Category

## Message arrival



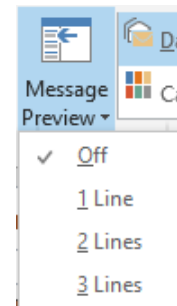
When new messages arrive:

- Play a sound
- Briefly change the mouse pointer
- Show an envelope icon in the taskbar
- Display a Desktop Alert
- Enable preview for Rights Protected messages (May impact performance)

## 3.2 Displaying a preview of all messages

- VIEW Tab – ARRANGEMENT Group

You will be prompted to set to apply this choice to :  
*All mailboxes ou This folder*



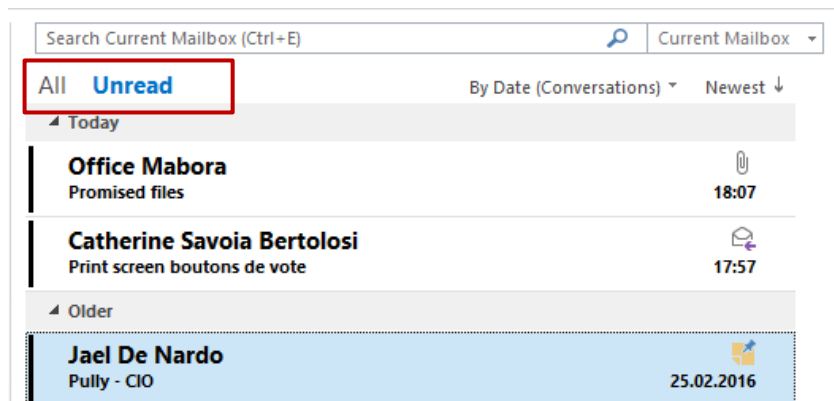
## 3.3 READ / UNREAD fast filter or marking

### Filter

At the top of the list of messages

### Marker

Click on the blue vertical line in front of the message header



## 3.4 Protecting your mail

Protecting incoming and outgoing mail is usually the responsibility of your network administrator. But some functionalities are worth mentioning.

### 3.4.1 Spam

Outlook analyzes the sender name, the country & the date and time of emission ... If Outlook concludes that the message belongs to spam, it is automatically transferred into the JUNK E-MAIL folder. Because I have once or twice sent messages late at night (0h30 for instance) those messages ended up in this folder. Therefore you should at times check this folder to see that it contains no "real" messages.



### 3.4.2 Phishing

Phishing is the malicious practice of luring you into disclosing your personal information, such as your bank account number and password. Often phishing messages have deceptive links that actually take you to spoofed Web sites that urge you to enter and submit your personal information. If Outlook determines that a message is suspicious, the message is sent to the **Junk E-mail** folder, and the links in the message are disabled. To prevent you from unwittingly replying to such a message, the Reply and Reply All functionality is disabled. In addition, any attachments in the suspicious message are blocked.

### 3.4.3 Pictures or sounds in messages

Messages in HTML format often include pictures or sounds from an external source on the Internet. This is typically done by legitimate senders to avoid embedding large graphics in the message itself. However, junk e-mail senders use this capability as a "Web beacon" that collects your e-mail address. When you open the message and the content is downloaded automatically, you are inadvertently verifying to the sender's server that your e-mail address is valid. Your e-mail address can then be sold to spammers, often resulting in more junk messages being sent to you. You should download pictures only when the message comes from a trustworthy source.

### 3.4.4 Reducing spam in the Inbox with the Outlook E-mail Postmarking (only with Exchange)

Before messages leave your Outbox, Outlook 2010 stamps each message with an e-mail postmark. The postmark incorporates unique characteristics of the message, including the list of recipients and the time when the message was sent. As a result, the postmark is valid only for that e-mail message. It takes some extra computer processing time to construct the postmark. This is applied to all outgoing messages unless the recipient belongs to your Microsoft Exchange Server. When a recipient e-mail application that supports Outlook E-mail Postmarking receives a postmarked message, it will recognize the postmark. The postmark indicates to the recipient e-mail application that the message is not likely to be spam. Spammers rely on being able to send thousands of spam messages per hour. To generate a postmark for each message and continue to send these at the same rate as when they were sent without postmarks, spammers would need to spend a significant amount of money to acquire more computers. Therefore, spammers are less likely to send messages that are postmarked.

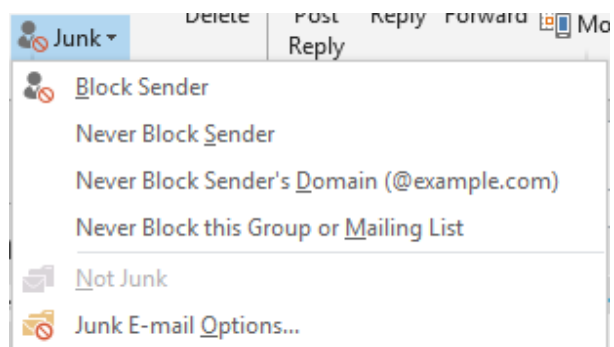
### 3.4.5 The JUNK E-MAIL folder

Outlook automatically detects spam messages and moves them to the JUNK-EMAL folder. But you can also manually add a sender to the « black list » and send all its messages to the same folder :

- HOME Tab – DELETE Group

Or

*Right click the message and set whether to block its sender or not.*



Click on **OPTIONS** to set how suspect mail should be searched, to decide to delete such messages rather than moving them to the **JUNK-EMAIL** folder, to block all messages coming from a given country etc ...

## 3.5 Managing attachments

### 3.5.1 Preview

For a better vision : edit the message rather than try to read inside the Reading Pane.

Simple click on the attachment. The message body text is removed and replaced with the file content (Office file for example). For some files, a **PREVIEW** button will first be displayed (PDF file for example).



No modification, only for reading purposes.

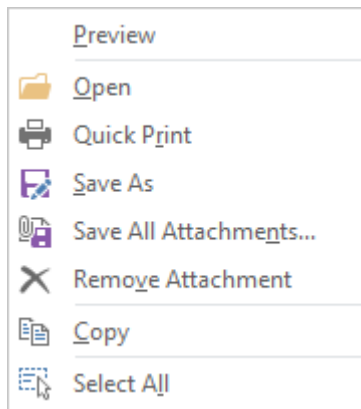
To preview an Office file, MS-OFFICE must have been installed on the workstation. Third-party programs provide their own preview generator, if necessary run a Google search. *PDF special* : Adobe and Microsoft have an agreement and previewing is no issue.

You revert to the message by clicking on the MESSAGE envelope icon.

List of preview generators : FILE – OPTIONS – TRUST CENTER – TRUST CENTER SETTINGS Button ... ATTACHMENT HANDLING Category.

### 3.5.2 Printing, saving, deleting ...

- Select the attachment or use the CTRL key to select more than one file
- Right click the selection :



#### Quick Print

*Interesting : the source file is not opened.*

#### Save As

*You can change the name*

#### Save All Attachments

*Set the destination folder*

#### Remove Attachment

*Interesting to be able to do this directly from the Reading Pane*

#### Copy

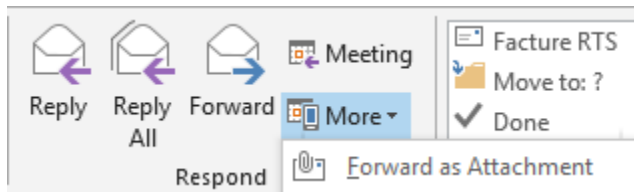
*The files can be then pasted onto the Desktop or any other destination folder.*

#### Select All

*Using the SHIFT key works also nicely*

## 3.6 Replying

- MESSAGE Tab – RESPOND Group : standard replying options



Inline replies : directly inside the Reading Pane

Unless you click on the POP OUT button. In this case the reply window is opened fully

**Date:** Yesterday  
[Draft] Atel... SGP Newsletter Ateliers en annexe

Pop Out X Discard

From: jdenardo@office-doc.ch  
To: Ateliers SGP <...>  
Cc:  
Bcc:

Subject: RE: SGP Newsletter Ateliers en annexe

Hello,  
Merci pour la newsletter.  
Serait-il possible de l'envoyer également à cette adresse-ci ?

*A draft is automatically created while you are typing and this is indicated in orange and in brackets in front of the source message*

In all cases Outlook adds *RE :* in front of the message subject.

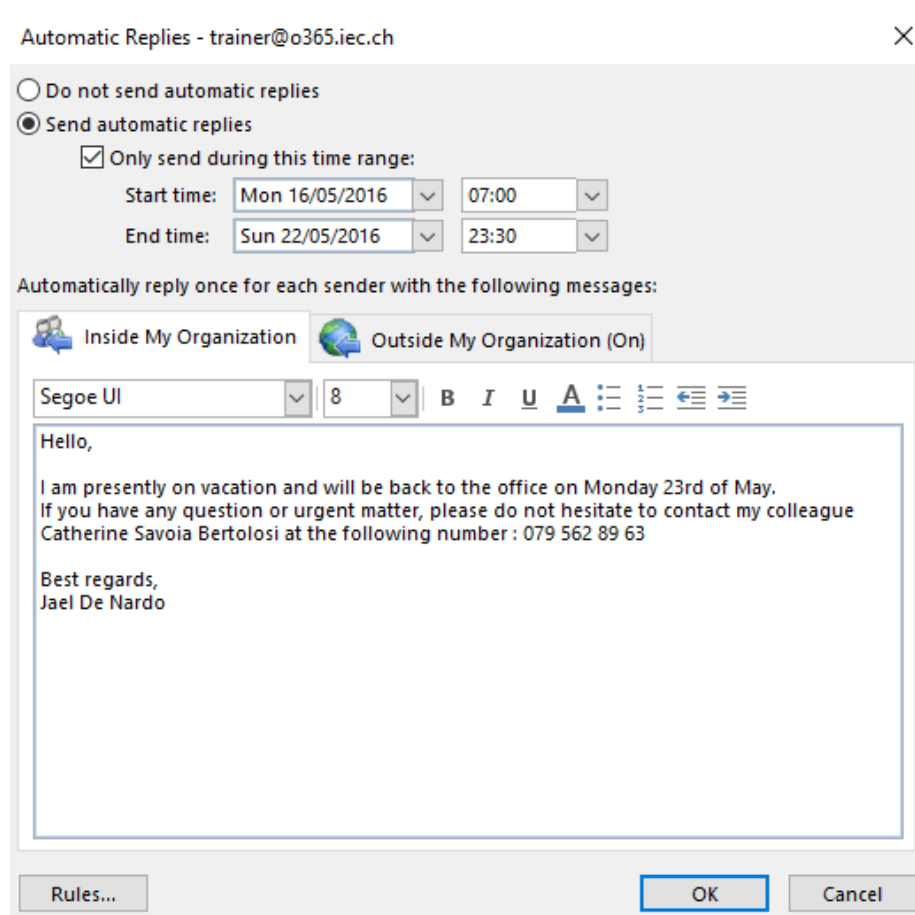
A reply window is displayed : Outlook adds *RE :* in front of the subject. Once the reply has been sent, you automatically “fall back” on the received message. If you find this irritating and wish that the source message be closed once you have replied : FILE – OPTIONS – MAIL Category – REPLY AND FORWARDS Section.

Once you have replied to a message, the icon placed in front of it will show a red arrow. If you double-click on the message, the top of the header tells you the date and time of your reply.

## 4 Managing your mail

### 4.1 Automatic replies when you are out of the Office

- FILE – AUTOMATIC REPLIES

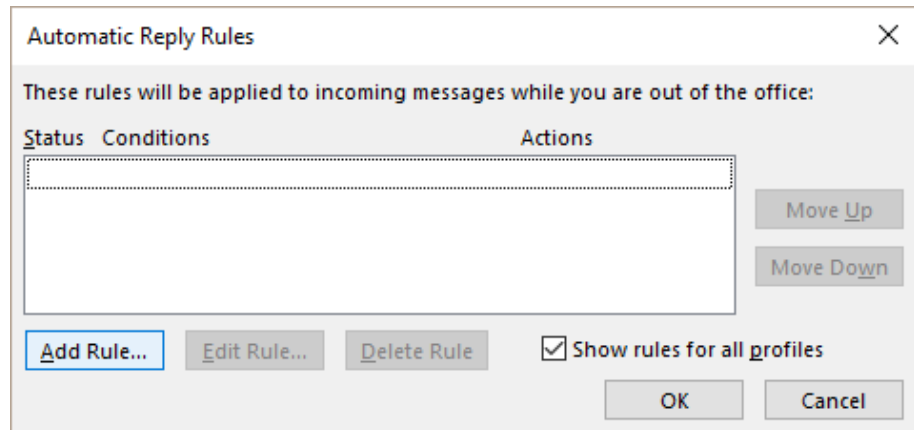


\* The word « organization » means your company and its users related to you by a common Exchange Server mail service.

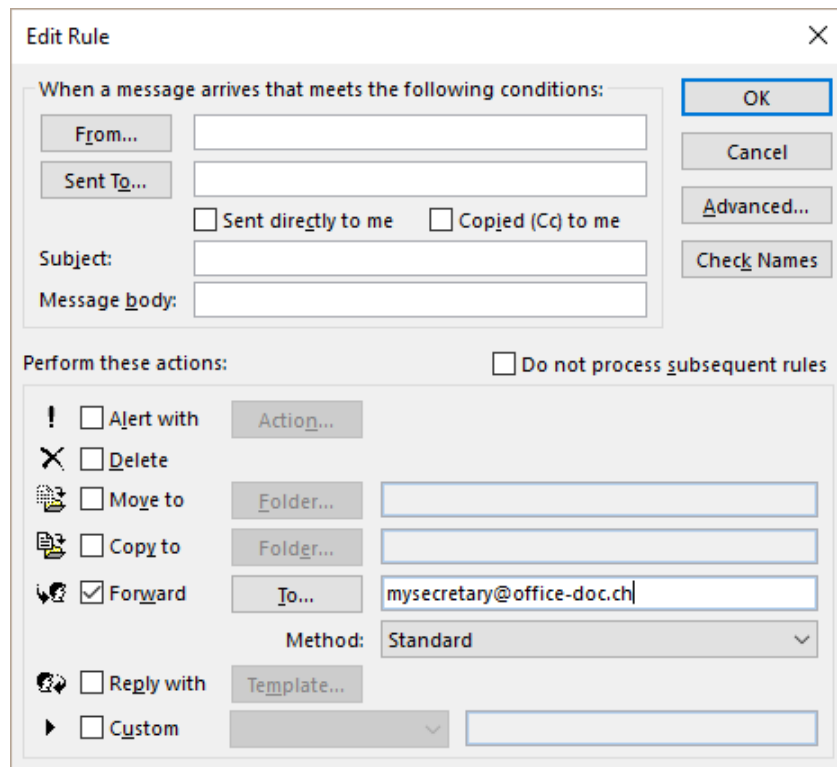
The message will inform the sender but the messages are delivered as usual.

The RULES button

Then the ADD RULE button :



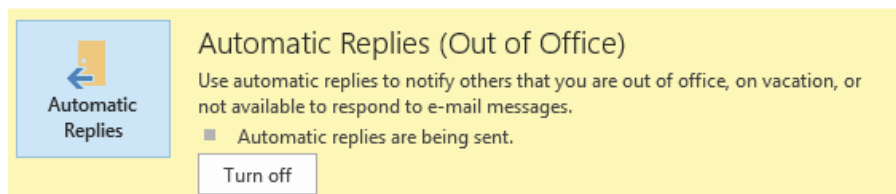
Possibilities are quite easy to understand :



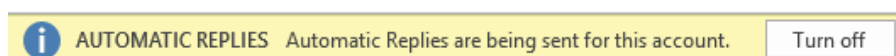
Common question : if I set that messages should be forwarded to a specific user, will a copy still be delivered into my Inbox ? **YES.**

Once you have activated the automatic replies, this is notified as follows :

FILE - INFO



Message bar (top of mailing zone)

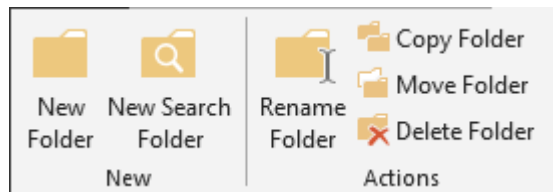


*Automatic turn off* : either because the end time is over or because you have identified yourself, run Outlook again and consequently the server has detected that you have « returned ». *Caution* : if you make some live tests (for a few hours for instance), but do not exit Outlook, the message bar continues to display the automatic replies even if it is actually off.

## 4.2 Creating a folder tree to sort out

Simply create folders as if you were in the Windows Explorer. Set the new folder *level* : a Mailbox subfolder or an Inbox subfolder ?

- FOLDER Tab – NEW and ACTIONS Groups



 You are not allowed to delete or rename a default folder such as Inbox, Sent Items ...

## 4.3 Moving a message to a folder

You can simply click and drag the message to the destination folder.

Reminder :

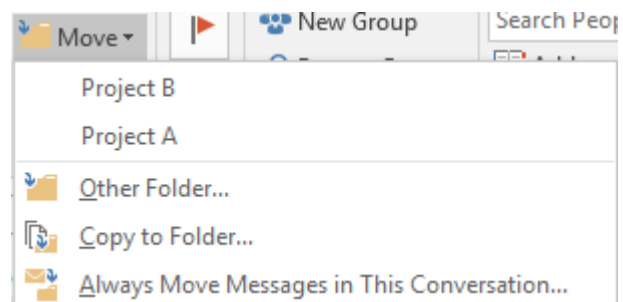
- *Dragging using the left button usually generates a MOVE*
- *Dragging using the right button displays a shortcut menu with copy-move-cancel options. Handy and more secured.*

But you can also :

- Select the required message(s)
- HOME Tab – MOVE Group :

The list of folders = recent folders

If you choose a folder that does not contain the same type of item, a new item will be created and Outlook will try to retrieve as much information as possible (for instance if you select a *contact* folder, the name of the sender and his/her email address will be retrieved).



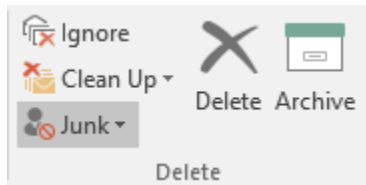
*Always Move Messages in This Conversation* : the future messages from this conversation will be automatically moved to the folder in question.

#### 4.1 Delete or Archive ?

HOME Tab – DELETE Group :

##### Delete

The message is moved into the DELETED ITEMS folder

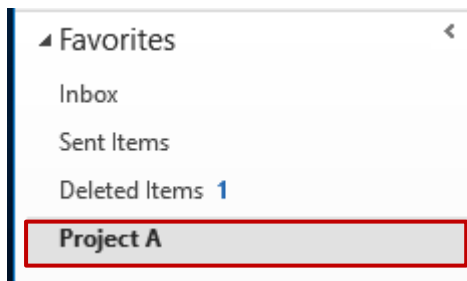


##### Archive

Not to be mixed up with *archiving*. The message is simply moved into the ARCHIVE folder until you decide what to do with it. No weight reduction as this folder is inside the Mailbox

#### 4.2 Setting a folder as a Favorite

- Select the required folder
- FOLDER Tab – FAVORITES Group – SHOW IN FAVORITES Button or Drag the folder into the Favorites section (top of the Outlook tree).

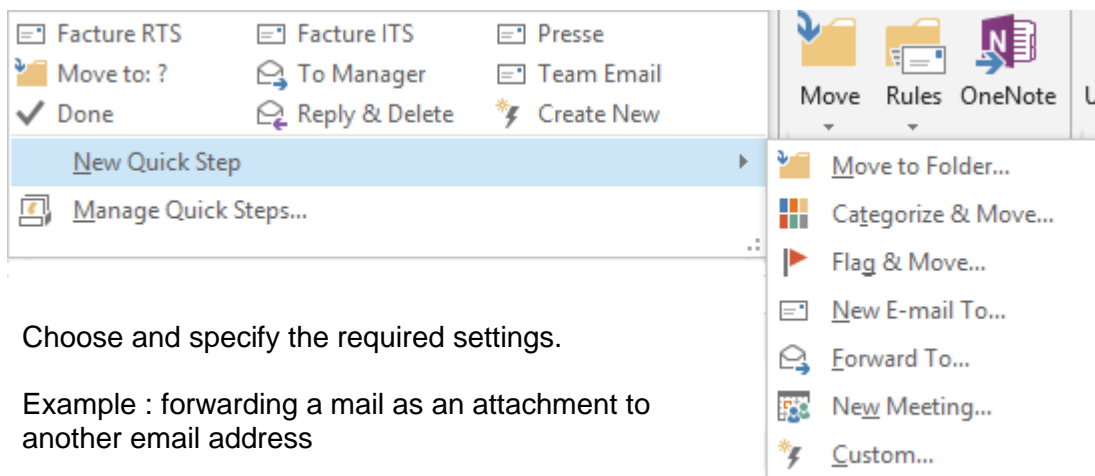


Remove : caution, no DEL key but right click and REMOVE FROM FAVORITES.

#### 4.3 Quick steps

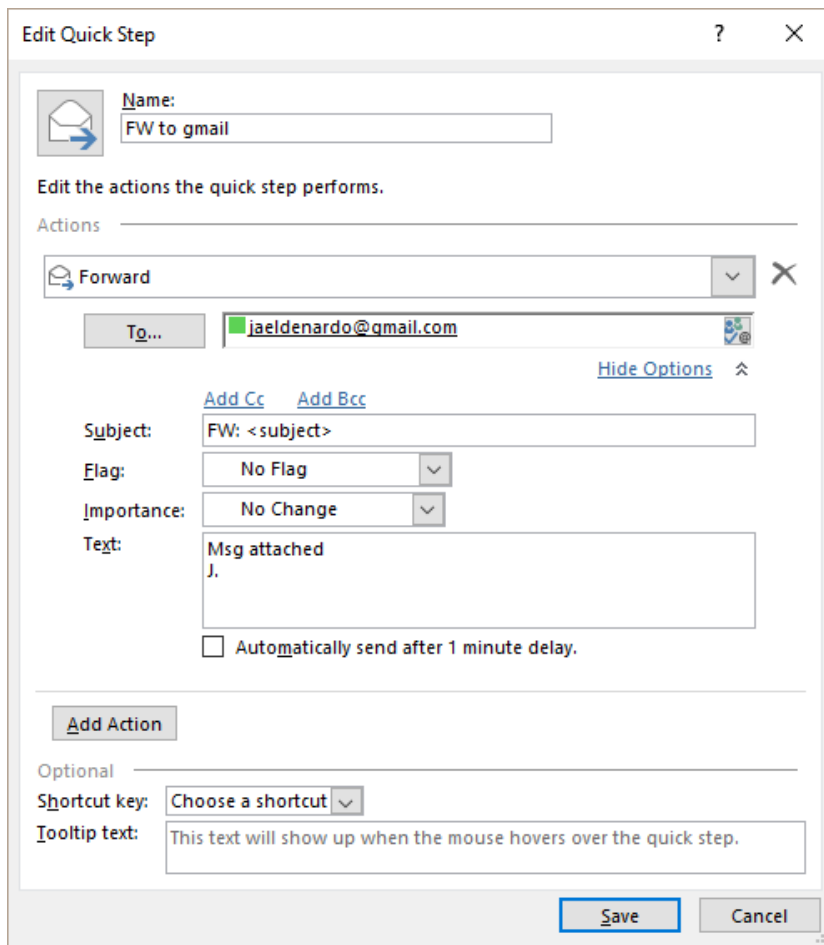
A reply action, a command to sort out ... can become repetitive. You can set it as a *quick step*. A click and the task is performed ...

- HOME Tab – QUICK STEPS Group



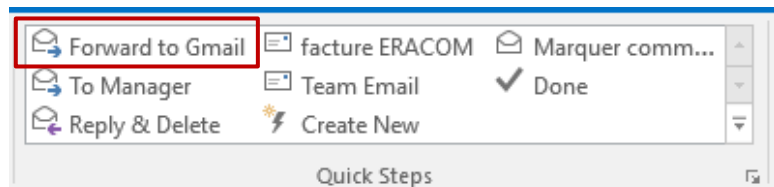
Choose and specify the required settings.

Example : forwarding a mail as an attachment to another email address



The gallery of steps will show the newly created step :

*Manage* : right click or option  
MANAGE QUICK STEPS

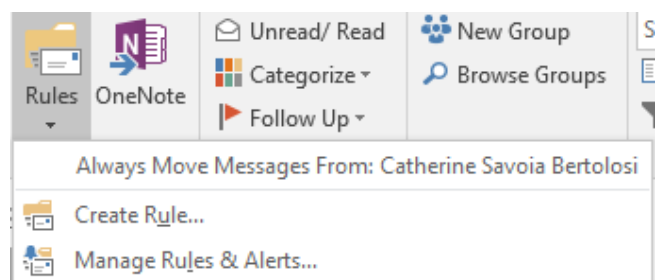


#### 4.4 Creating a rule for incoming mail

(It is possible to create a rule for outgoing mail but this is not very common)

All messages are delivered into your Inbox and then it is up to you to manage them : moving to another folder, deleting some messages. Setting quick steps can help but creating the rule goes beyond : the action will be automatically performed.

- Easier and more comfortable : start from a message concerned by a rule
- HOME Tab – MOVE Group





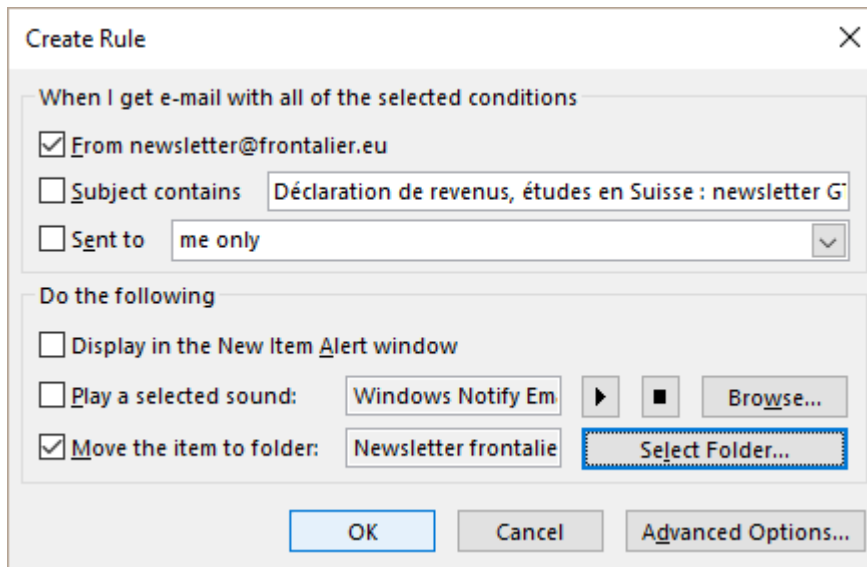
#### 4.4.1 Simple moving rule

##### *Always Move Messages ....*

The basic and most common action : select the folder in your tree. If necessary you can create a new folder.

#### 4.4.2 Create Rule

Select the message concerned by a rule (if you don't, you will not be able to change the sender's address) :



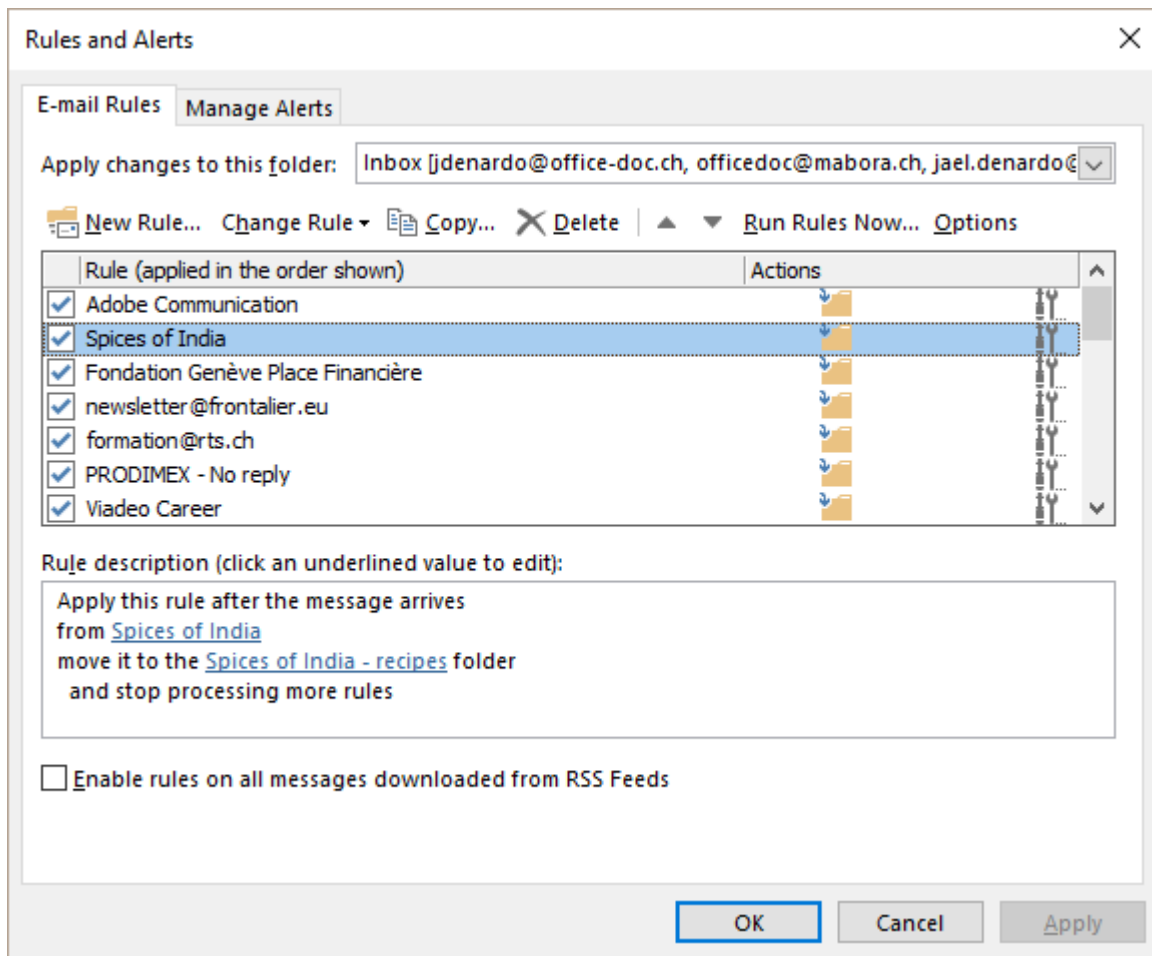
Some common settings : searching a specific text contained in the message subject, adding a sound ...

The *Advanced Options* button displays a dialog box showing all the possible settings that can be specified.


#### 4.4.3 Manage Rules & Alerts

To edit, delete, run ... a rule

To create a new rule, *starting from scratch and defining its settings one by one.*



\* Alerts : related to specific environments (such as SharePoint for example.)

 **A bit odd** : you can create a rule moving the messages from a conversation to a specific folder – not through this Rule button but through the MOVE button.

## 4.5 Search Folders

A search can become frequent. So it can be a good idea to create a rule, to avoid running the search manually again and again. This is the purpose of *Search Folders*.

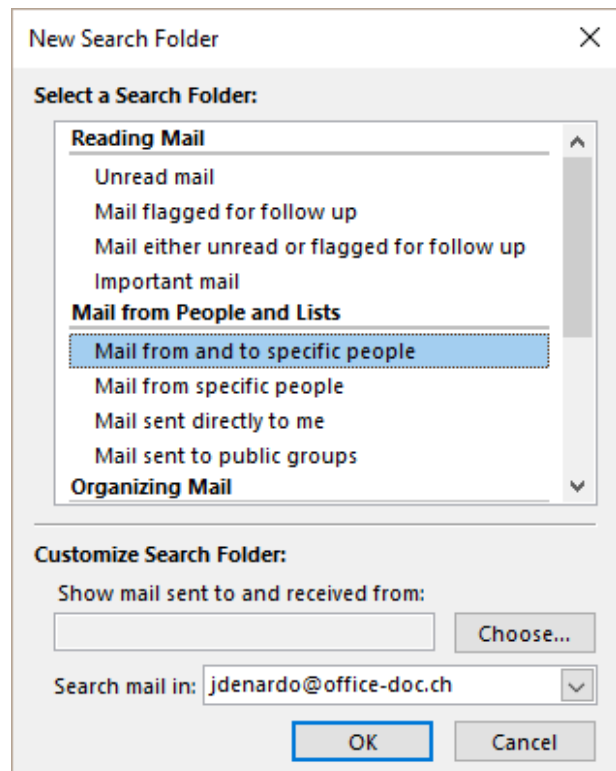
*Caution* : here, the word folder should not be understood as in Windows Explorer. It contains nothing, it is simply where a *memorized search is stored*.

*Example* :

Rapidly select messages from a given sender or containing specific words, in order to “sort them out and archive them”.

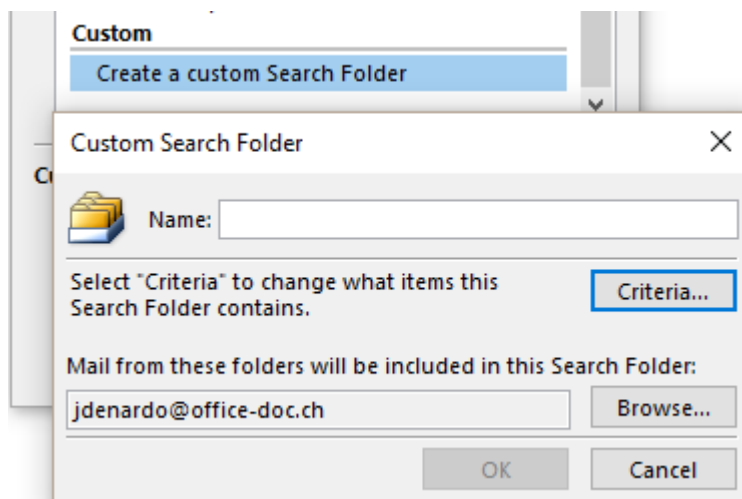
A simple search will let you set one sender. With a search folder, you can easily set more than one.

- Right click the SEARCH FOLDERS and option NEW SEARCH FOLDER or FOLDER Tab – NEW Group – NEW SEARCH FOLDER Button

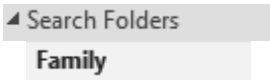


The dialog box provides two possibilities :

- ➊ Preset searches that you can customize by clicking on the CHOOSE button. It is the case of the above screen capture.
- ➋ At the bottom of the list :



*Set the name, selected advanced criteria, choose the folders (Outlook = all folders) etc ...*

Result :  Simply click on the folder to run the search

*Managing* : right click the folder and options RENAME, DELETE, CUSTOMIZE THIS SEARCH FOLDER ...

## 5 Viewing special features

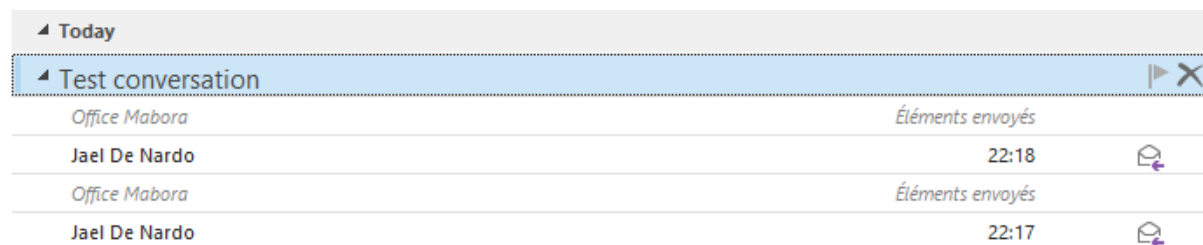
### 5.1 Show as Conversations

- VIEW Tab – CONVERSATIONS Group

#### 5.1.1 Display

It is an old problem : you receive a message and reply to it, your recipient also replies and you again .... a sort of message « ping-pong » that eventually includes lots of redundant messages (each reply shows the message history). If this has lasted over a fair number of days or weeks, the messages are scattered in the folder. *How could we group these messages into a net thread and remove obvious redundant messages ?*

Outlook now automatically groups messages belonging to the same « thread » or « conversation ». Here below an example of a conversion between two users :



- 🔴 The Office Mabora sent message does not physically belong to the conversation tree (the message is stored in the Sent Items). It is displayed because it belongs to the conversation.

#### Conversation characteristics

- Click on the top *triangle* to expand or collapse the conversation
- An *unread message* will be displayed in bold characters
- Split conversation* : click twice on the triangle to expand it.  
What leads to splitting ? For example if you answer twice to the same message (the first time to the sender email address number 1 and the second time to his/her address number 2). Or when you add another recipient as cc in the middle of the conversation thread ...
- 🔵 Outlook recognizes a conversation by analyzing the subject words. If two messages have the same subject (for instance November invoice), they are grouped into the same conversation ...

Managing : explained in the topic dedicated to « sorting things out ».

#### 5.1.2 Deleting, cleaning or moving a conversation

Sometimes you are really out of the conversation ... *or*  
For long a long conversation, only the last messages are interesting (they contain the history of messages anyway). It would be interesting to remove redundant messages. *or*  
The conversation is closed : you would like to « put it away » in a specific folder

- HOME Tab – DELETE Group

## The IGNORE CONVERSATION Button

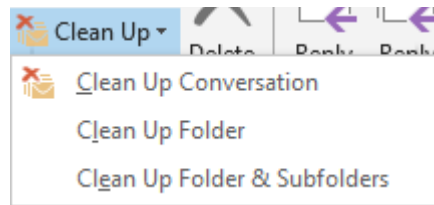
*Classical : you are not really concerned by the conversation*

The past and future messages will be moved to the DELETED ITEMS folder

*Regrets ? You need to select all items and move them manually back into the Inbox folder*

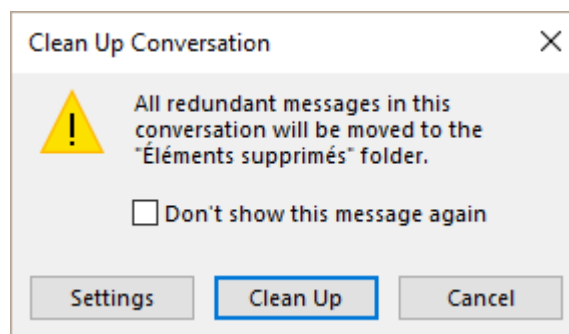
## The CLEAN UP Button

Redundant messages (in the active folder) are deleted.




*Clean Up Folder = all conversations in THIS folder*

Same for subfolders.



Only the last exchange – sent and received – will remain.



 Outlook never removes a message with attachments. Moreover, Outlook needs a 100% linear conversation to clean it up. If Outlook does not detect a correct « flow », many messages are not deleted. If it happens that nothing is removed then a dialog box will be displayed to inform you.

## Delete or move the conversation

### Caution with your selection

#### The conversation is collapsed

Deleting or moving will affect only the messages in the active folder. For instance, if your active folder is Inbox, only the messages from Inbox will be concerned and none of the Sent Items folder.

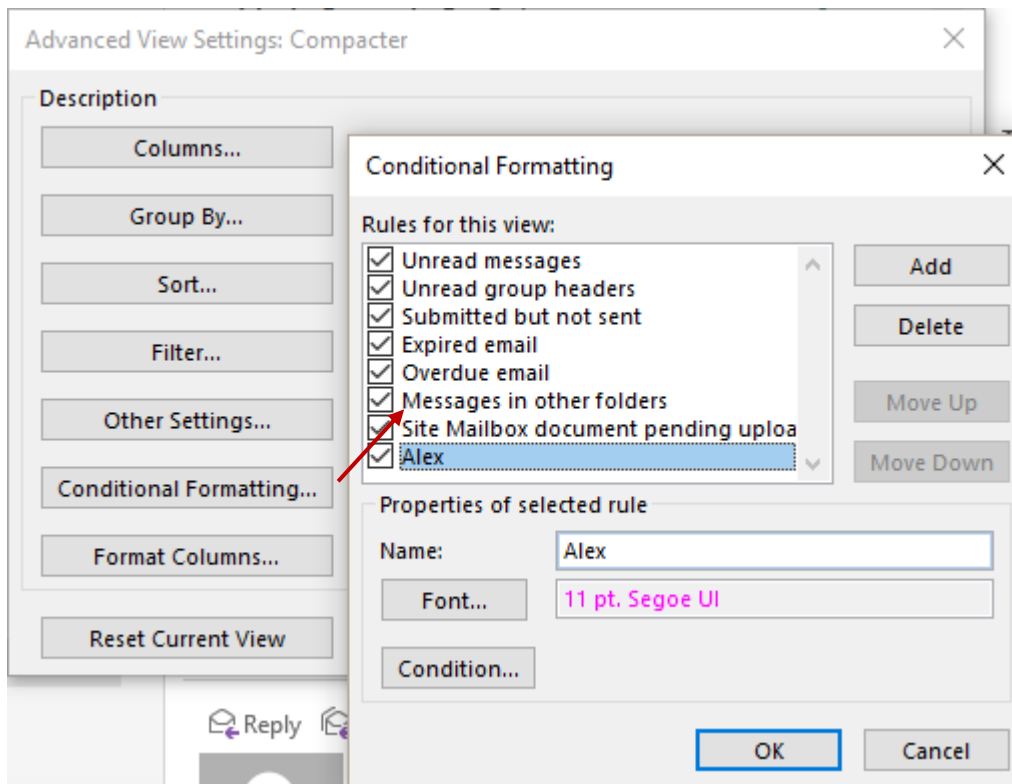
#### The conversation is expanded

To affect all messages : select all of them with the CTRL or SHIFT key but make sure you do not select the conversation title row. If you include the title row, it will work like with collapsed conversations : only the messages from the active folder will be affected.

*Note : the destination folder will display the conversation only if you have set so in VIEW.*

## 5.2 Font and color for messages with a specific content or from a given sender

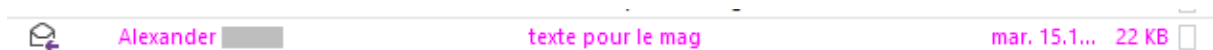
- VIEW Tab – CURRENT VIEW Tab – VIEW SETTINGS Button :



How to proceed :

- Click on the ADD button
- In the NAME textbox : type the name of your conditional formatting
- Click on the FONT button to display a dialog box where you can set the font, the colour and other attributes such as bold or italics.
- Click on the CONDITION button to display a dialog box to specify the key word in the message subject or body text or the name of a given sender ...

Result :



\* Name of sender : in several tests I clicked on the FROM button to retrieve from the contacts the name and email address of the required sender but with no satisfactory result ! In the end I simply typed the name as it is displayed in the message header and ... it worked ...

## 6 Creating a message template

### 6.1 An .oft template

#### 6.1.1 *Creating*

Prepare a message with every required item (recipients, attached file(s), signature ...

FILE – SAVE AS – Choose to save in .oft. format

The following folder will be automatically selected :

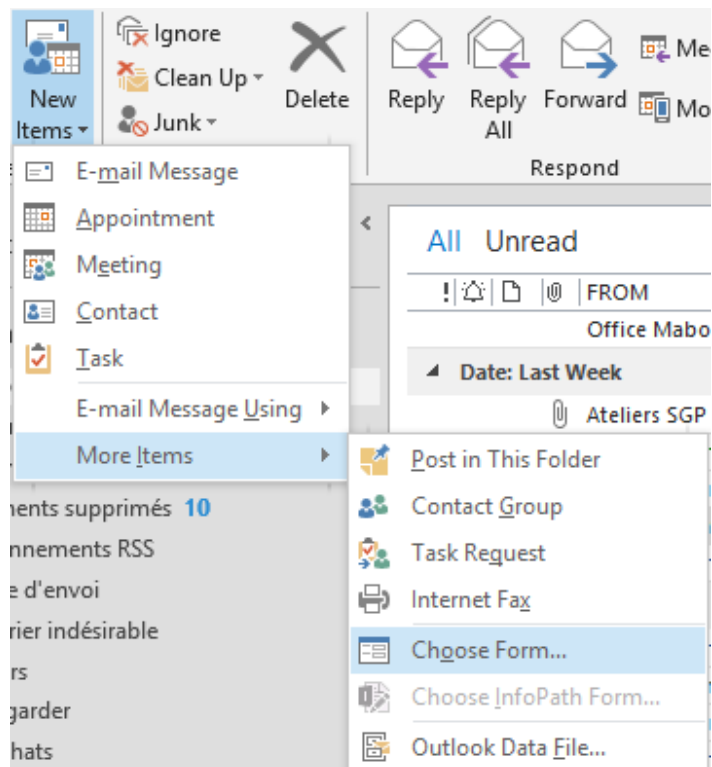
« Jael » AppData » Roaming » Microsoft » Templates »

You may specify another custom or shared folder

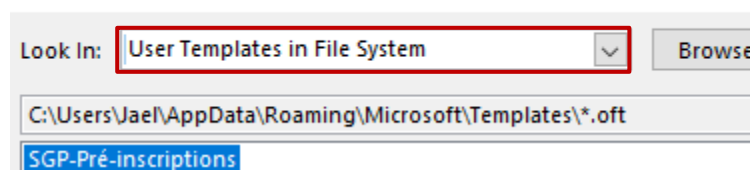
#### 6.1.2 *Using*

**Ideal** : double-click on the file directly from the Windows Explorer. A new message will be automatically created.

You can also stay in Outlook but really the steps are not « user-friendly » :




#### Choose Form



### 6.1.3 Strong and weak points

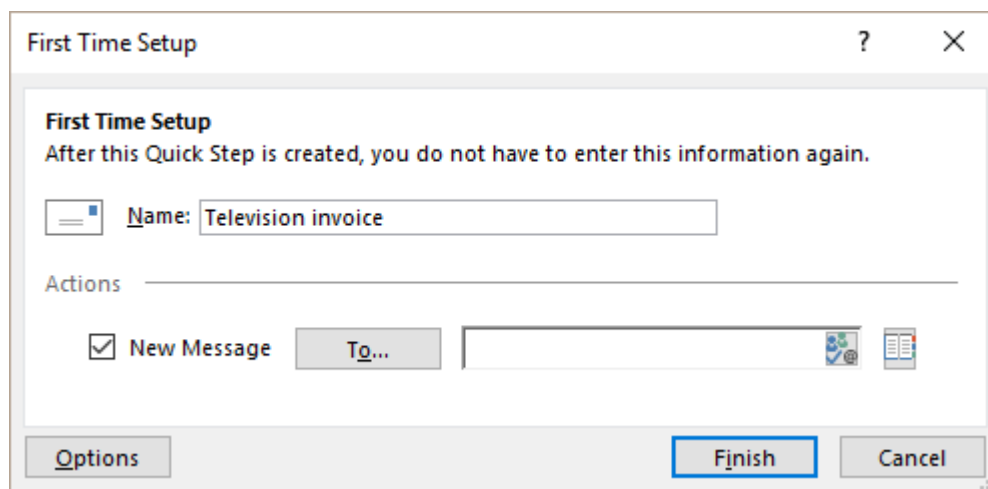
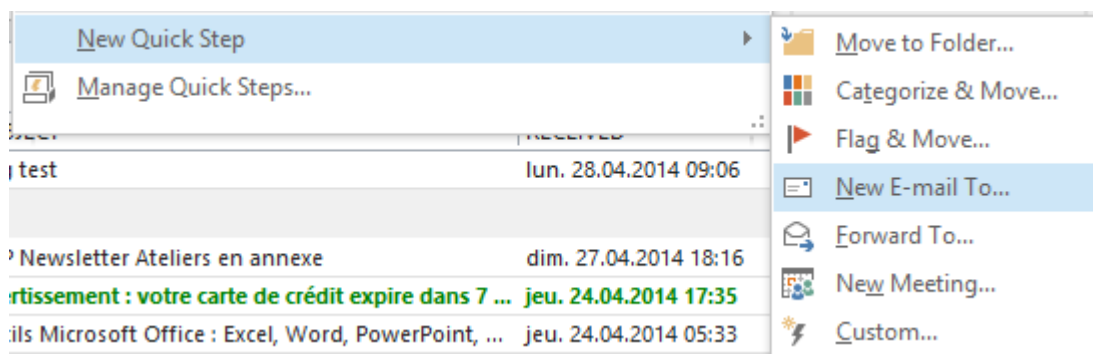
**Strong point** : the message template includes everything you have prepared

**Weak points** : the file is stored on the hard disk (outside your Exchange mailbox). Access not particularly « user-friendly » or you need to work with the Windows Explorer.

 **Tip that works nicely with Outlook 2013-2016 but unfortunately not in OWA (Web App from Office 365)** : create a subfolder in your Outlook tree (such as « My templates » for instance) and drag the .oft file from the Explorer right into this folder. The file (a copy) now belongs to your mailbox and can be double-clicked to create a new message ...

## 6.2 A template as a quick step

### 6.2.1 Creating



### **Important**

Give a name to your template but fill in the To... textbox only if the message needs no object, no other text (this should be rare as it is rather uninteresting ...) Do not click on the OPTIONS button or Outlook will create two messages ...

Click on the FINISH button.

Then right click your template in the gallery and click on the EDIT xxx option to finish setting it up :



**Edit Quick Step**

Name:

Edit the actions the quick step performs.

Actions

To...

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

Subject:

Flag:

Importance:

Text:

Automatically send after 1 minute delay.

Optional

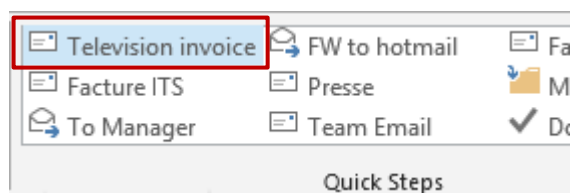
Shortcut key:

Tooltip text:

Click on the SAVE button

### 6.2.2 Using

HOME Tab – QUICK STEPS.  
Simply click on the quick step name



### 6.2.3 Strong and weak points

**Strong point** : the template is stored in your Exchange mailbox. Access is « user-friendly »

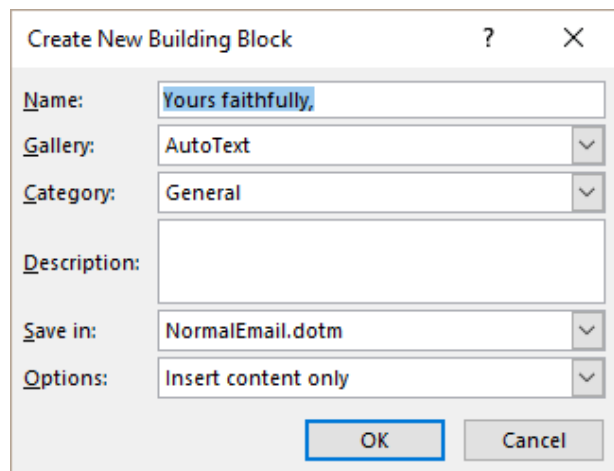
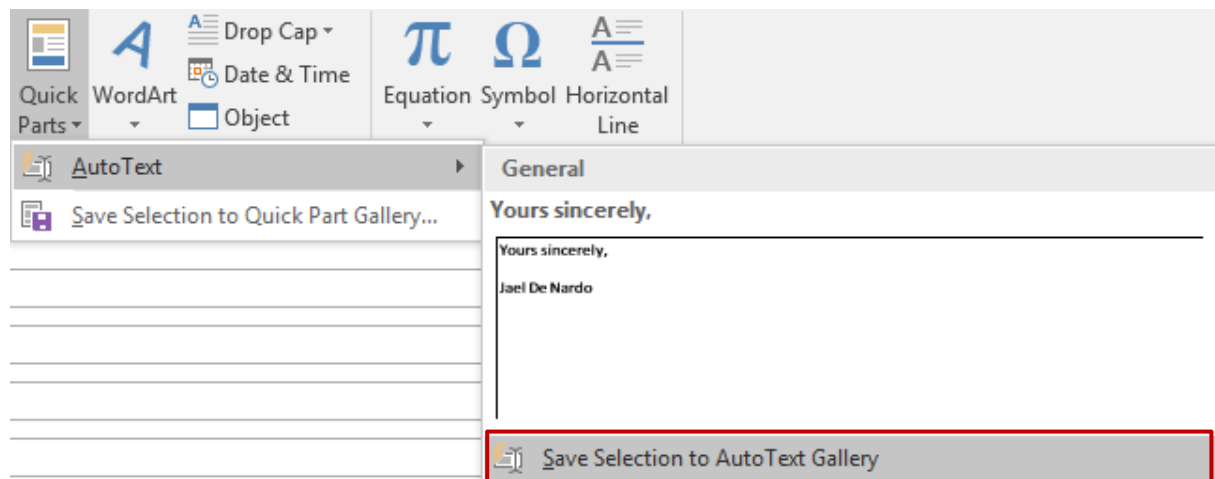
**Weak points** : you cannot add an attached file, a signature and any text formatting  
The gallery is rather small, you would not opt for this method if you think of creating tens of templates ...

## 6.3 A handy complement to templates : autotext entries

### 6.3.1 *Create and use*

**Important** : if you have such autotext entries in Word they are not retrieved in Outlook. The reason is that Word uses NORMAL.DOTM as a basis and Outlook uses NORMALEMAIL.DOTM.

1. Type the text or retrieve something from Word with a copy-paste
2. Select the text
3. INSERT – TEXT Group – QUICKPARTS Button – AUTOTEXT Option :

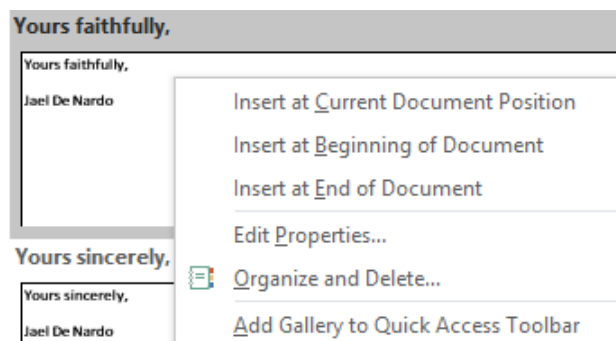


Two possibilities :

- Leave the beginning of the text as the code for the entry. When you type it, at the 4<sup>th</sup> character, a tooltip prompts you to press the ENTER key to complete.
- If more than one entry should start with the same text, it is better to start with a code that has 4 characters minimum.

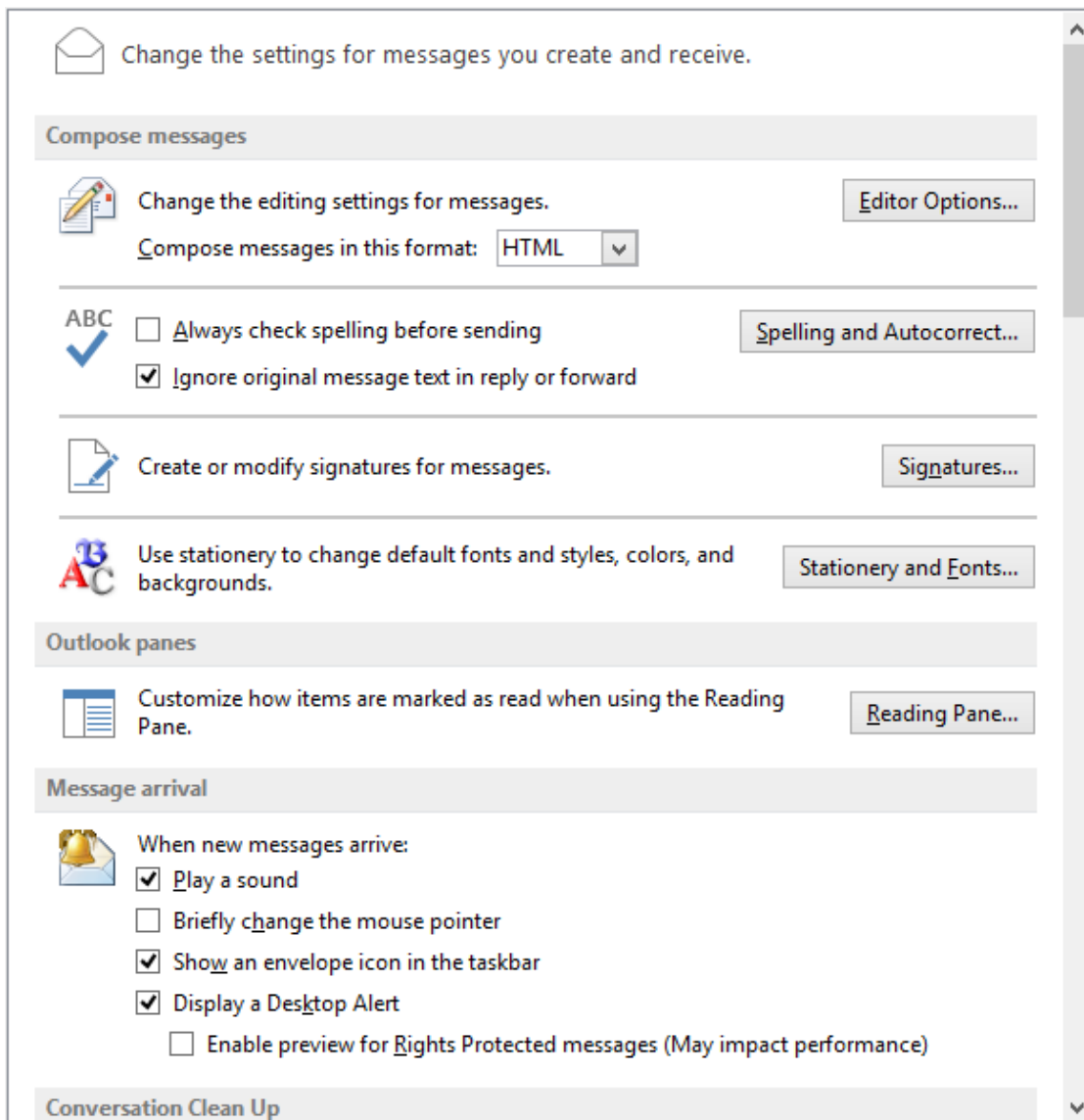
### 6.3.2 *Manage*

Display the autotext gallery and right click the required entry :



## 7 Customizing options

- FILE - OPTIONS – MAIL Category



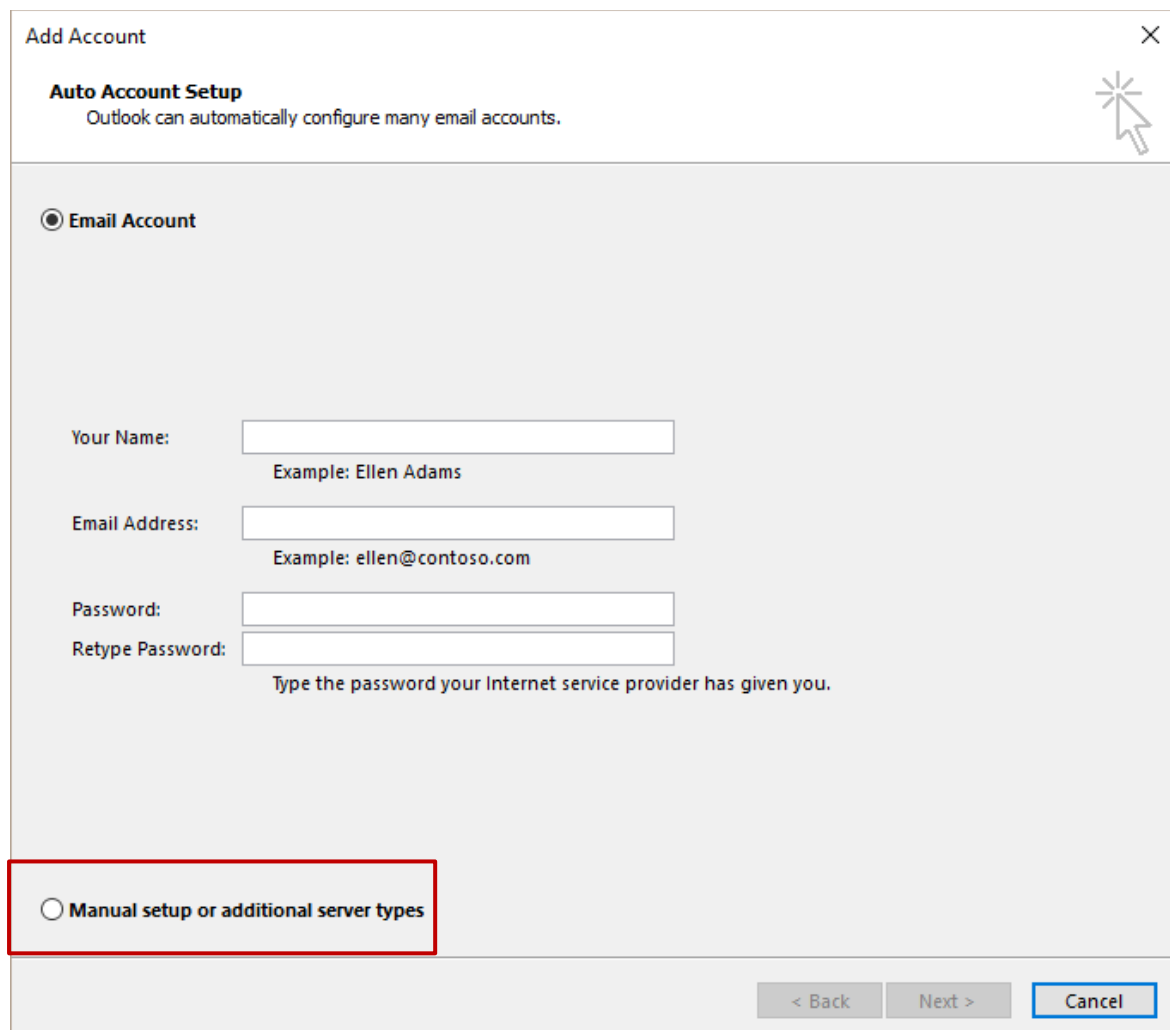
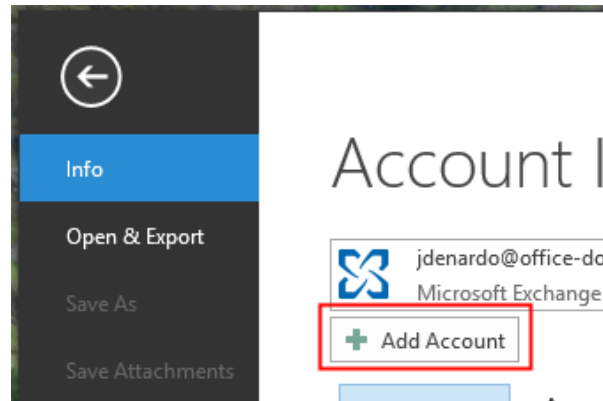
- ✓ Which is the default text format ?
- ✓ Should Outlook run the spell check before sending a message ?
- ✓ The default font is set in a template called NormalEmail.dotm but it is important to set the same one in STATIONERY AND FONTS ...
- ✓ Number of seconds for the Alert
- ✓ Should the source message be closed when I reply ?
- ✓ CTRL + ENTER is a shortcut to send a message : active or not ?
- ✓ Can I use the comma to separate recipients instead of the semi-colons ?
- ✓ A read receipt for *all* messages ?

Etc ...

## 8 Special : how to connect to Hotmail

Up to now your private Hotmail account could not be added to your Exchange mailbox tree (unless you used the Outlook Hotmail Connector add-in). Outlook 2013 does it now very easily.

- FILE – ADD ACCOUNT :

A screenshot of the 'Add Account' dialog box. The title bar says 'Add Account' with a close button. Under 'Auto Account Setup', it says 'Outlook can automatically configure many email accounts.' There are two radio button options: 'Email Account' (selected) and 'Manual setup or additional server types' (highlighted with a red box). The 'Email Account' section contains four input fields: 'Your Name:' (with example 'Ellen Adams'), 'Email Address:' (with example 'ellen@contoso.com'), 'Password:', and 'Retype Password:'. A note below the password fields says 'Type the password your Internet service provider has given you.' At the bottom right are three buttons: '< Back', 'Next >', and 'Cancel'.

Add Account



Choose Service



- Outlook.com or Exchange ActiveSync compatible service**  
Connect to a service such as Outlook.com to access email, calendars, contacts, and tasks
- POP or IMAP**  
Connect to a POP or IMAP email account

Change Account



Server Settings

Enter the information that is required to connect to an Exchange ActiveSync service.



User Information

Your Name:

Email Address:

Server Information

Mail server:

Logon Information

User Name:

Password:

Remember password

Offline Settings

Mail to keep offline:  All

< Back

Next >

Cancel

NEXT : some connection tests and ... it is done !

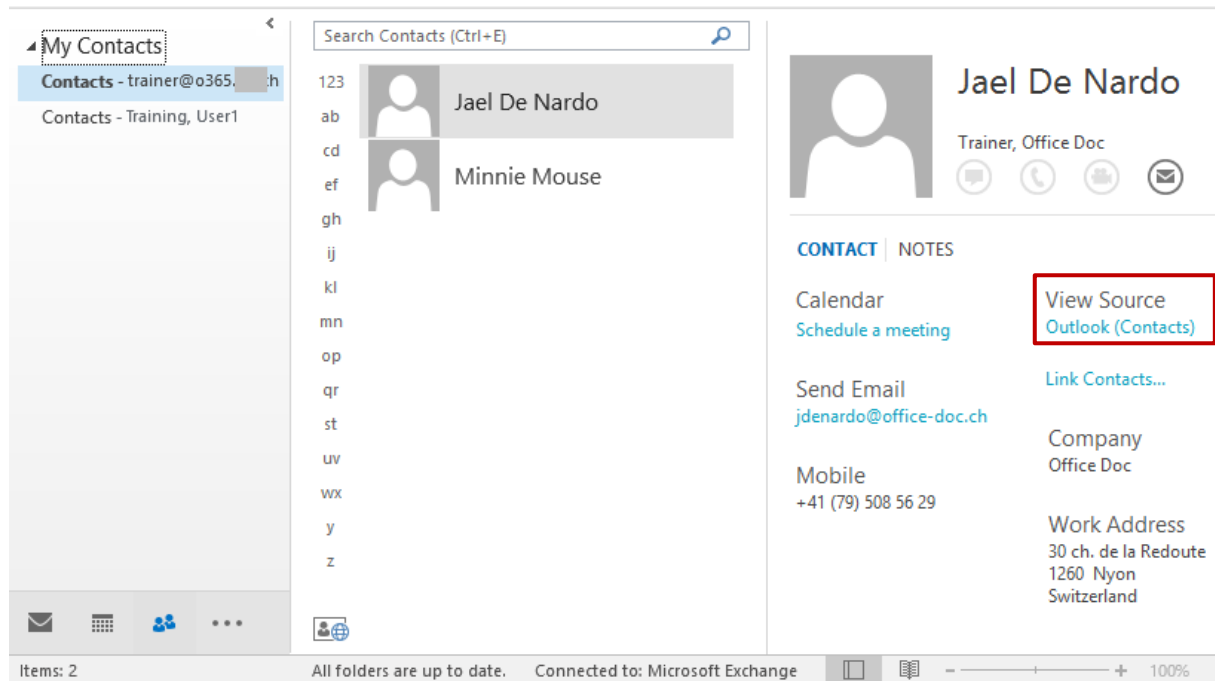
▷ jdenardo@office-doc.ch

▷ @hotmail.fr

# PEOPLE (CONTACTS)

View : HOME Tab – CURRENT VIEW Group –The gallery displays several vies

The CONTACTTS default view

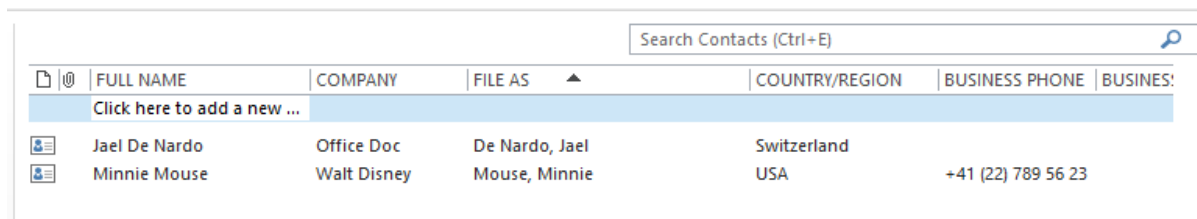


*Ouverture de la fiche CONTACT*

BUSINESS CARD (also CARD that simply displays more details)



À tabular list such as TELEPHONE / LIST



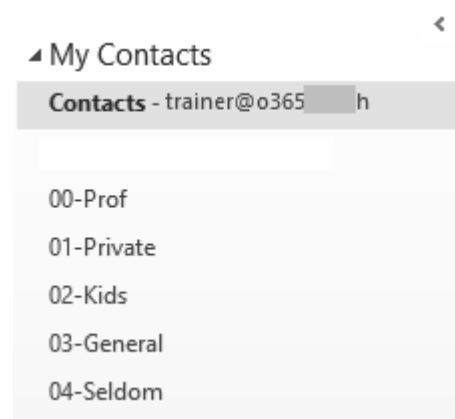
	FULL NAME	COMPANY	FILE AS ▲	COUNTRY/REGION	BUSINESS PHONE	BUSINES'
	Click here to add a new ...					
	Jael De Nardo	Office Doc	De Nardo, Jael	Switzerland		
	Minnie Mouse	Walt Disney	Mouse, Minnie	USA	+41 (22) 789 56 23	

## 1 Navigation Pane

### 1.1 The CONTACTS folder and its possible sub-folders

You can have just one CONTACTS folder with *all* your contacts (and you can *categorize* them to sort them out)

But you can also sort out your contacts into subfolders, as shown by the following screen capture (my own account) :



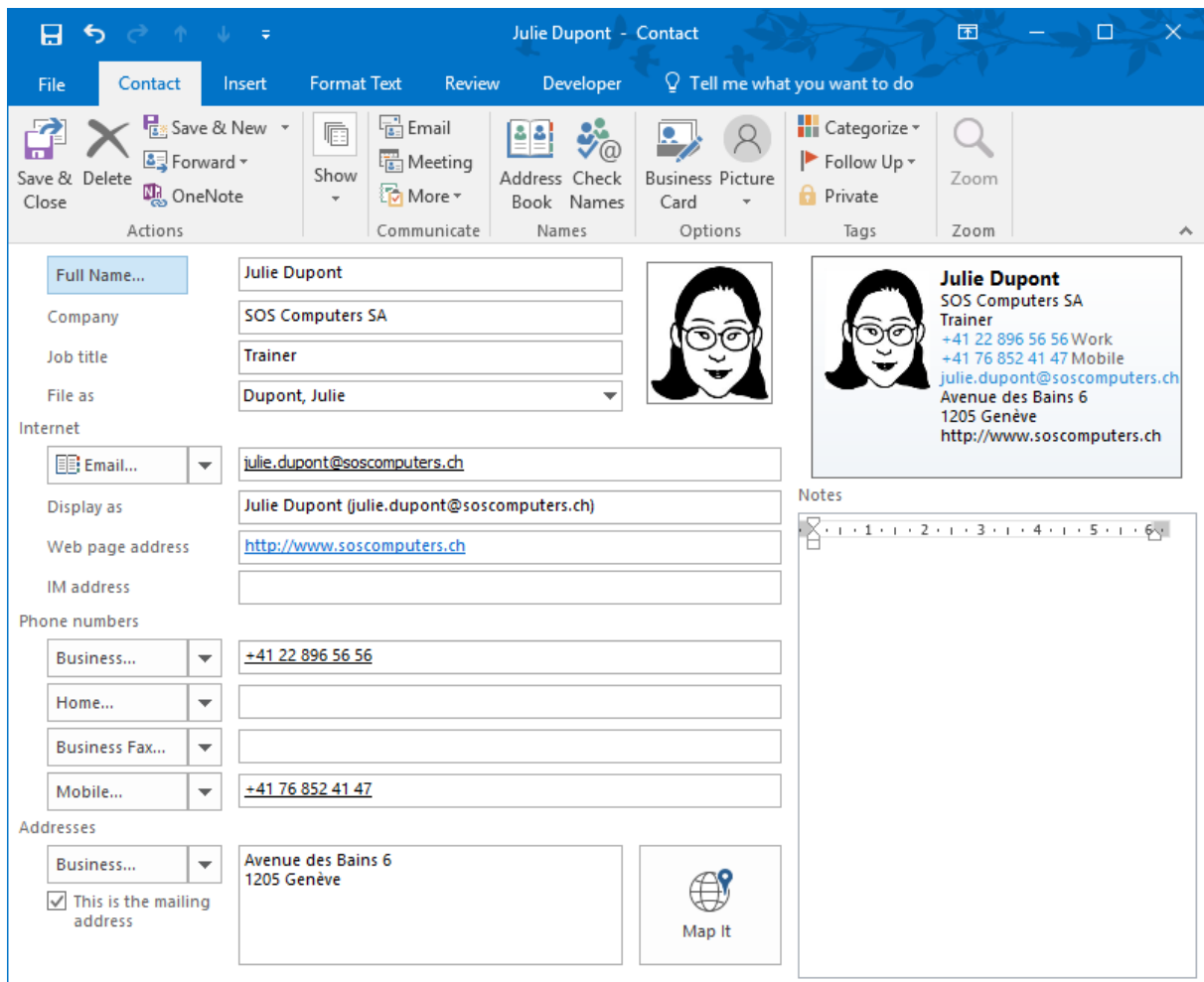
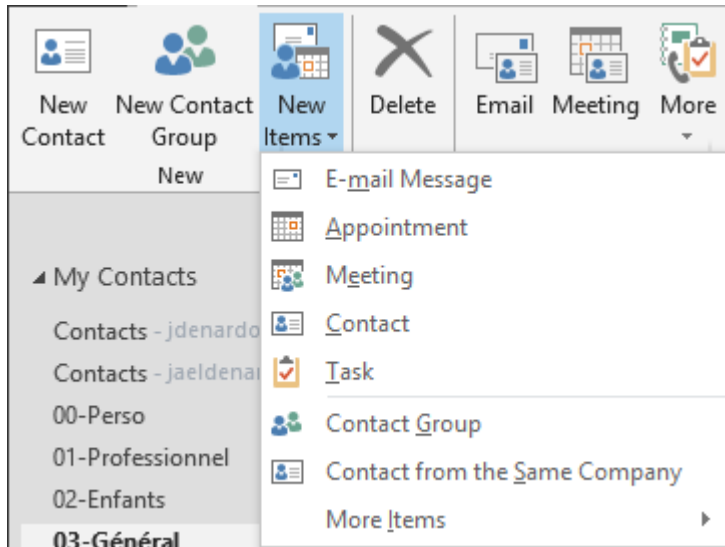
*The reason ?* In the first place a choice because of my iPhone mobile. It allows me to synchronize only the folders of my choice (I do not want to synchronize the *Seldom* folder). Consequently, the main CONTACTS folder is empty. Searching a contact is no problem with the iPhone : the search can be run in the required *Group* but it also provides an *All contacts* view.

**Caution** : Smartphones don't work all the same ! Iphone reads subfolders but not categories, a tested HTC some years ago did exactly the contrary, and the present Windows Phone reads nothing (no folders and no categories !!!). My present Samsung reads categories but not folders.

Consequently, choose your organization carefully ...

## 2 Creating new items

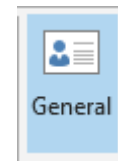
### 2.1 Creating a new contact






Usual form to fill in ... Here below some interesting or important points :

### 2.1.1 CONTACT Tab – SHOW Group – GENERAL Button



**Fields preceded by a button whose label ends with dots** You can type the name and address directly into the corresponding areas but if you first click on those buttons you will be able to check the correct order of the internal fields for the name or the address. This will be a compulsory action in the case of a Word mail merge that retrieves the internal fields one by one into the data file.

 The mailing address is the *current address* that is the one that can be retrieved in a Word letter, a Word merge mailing .... even though the address can be really the office or private address in the contacts data base.

**File as** Automatically inverts the first name and last name that you have typed under Full name. After validation, this will let you select the column you want with a tabular view. (usually you think of people with the first name but search for them in a list by their last name).

**Business Home Fax Mobile** You can memorize up to 19 telephone numbers but only 4 can be viewed in the box. The order of those four numbers is pre-set but you can change it.

The number can include spaces, dashes, hyphens, brackets and even text at the end of it (ex : internal number 45). OUTLOOK will ignore them. But caution if your Outlook contacts are synchronized with your mobile phone. A fair number of mobiles tolerate spaces but not dashes or additional texts.

*International codes for tel numbers : + followed with the country code. No 0 before the city or mobile code (ex. +41 79 508 56 29)*

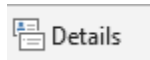
**Photo** Click on the empty photo frame and a dialog box will be displayed for you to select the corresponding picture file.

*To change the picture file inserted into the contact window : double-click*

**Interesting** : the photo will remain when sent to a message recipient whether sent as a *business card* (.vcf – 100% guarantee) or as an *Outlook item* (not fully guaranteed but the few tests we did were positive)

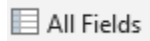
**People Pane** If Outlook Social Connector is turned on, the People Pane will be displayed at the bottom of the window and provide tools to check the contact *activities* (on his Facebook account for instance)

### 2.1.2 Additional information linked to a contact (CONTACTS Tab)

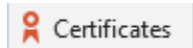


To add information such as the name of the contact boss, the contact assistant, his or her birthday and so on

A birthday is automatically converted into an event in your calendar.



All possible fields are listed, sorted out by preset categories (all *Address* fields for example). You may also create custom fields (NEW button).

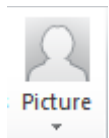


Certificates (or electronical identification) to crypt confidential information

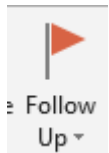
### 2.1.3 CONTACT Tab – Other interesting commands



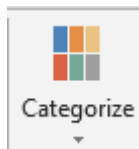
To display the contact business card. This card can be modified as you need (background color, items to be included on the card etc ...)



Two options : one to modify the picture (same as if you double-click it) and the other to remove the picture



To flag a contact  
The contact form will be listed in the To-Do Bar

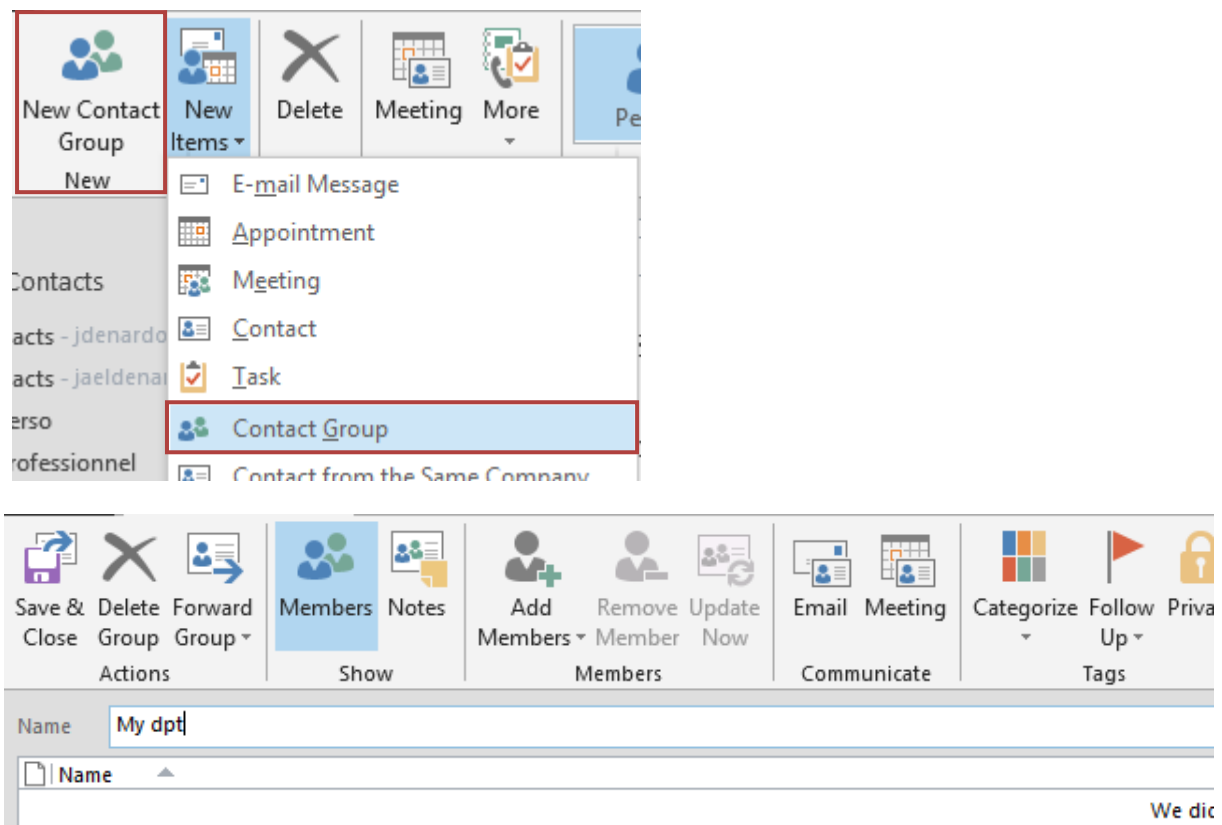


To assign a category to the contact.



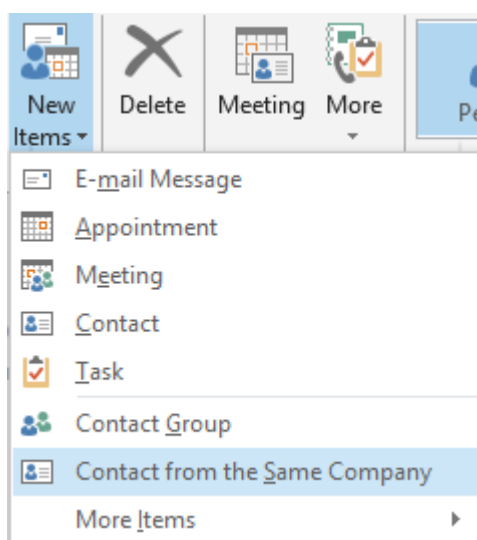
The contact is made private and will be invisible to anyone reading your contacts folder, even with the highest sharing rights. Unless you grant the delegate permission to see private appointments

## 2.2 New Contact Group (old distribution list)



Type the name and use the ADD MEMBERS button to add the members. Those can come from the Global Address List, your contacts or even a manually typed email address. (more explanations : see page 44)

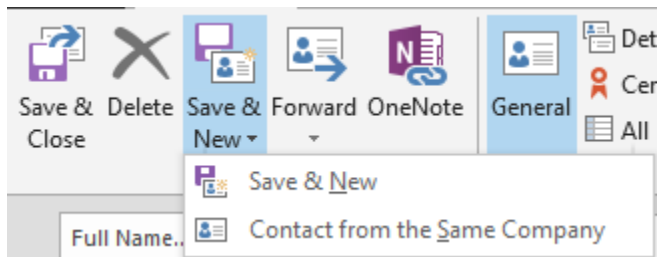
## 2.3 New Items



Interesting : *Contact from the Same Company*. To retrieve common information such as the *postal address* for instance.

## 3 Saving

---



*Save & Close*  
As usual

*Save & New*  
The contact is created and a new contact form to fill in is automatically displayed.

*New Contact from ....* retrieves the address

## 4 Updating a contact

---

OUTLOOK internal architecture is not dynamic which makes some global functions impossible to order. This is particularly true with contacts. For example, if a company in your base has a new address, a new telephone number ... you will have to modify the information manually into each contact concerned with the change.

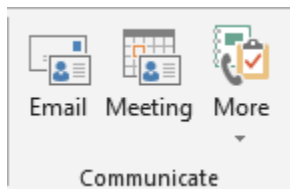
Caution : if you drag a contact into a folder containing already the contact in question but with some differences, both contacts forms are kept and you end up with duplicates. No real option to merge them and decide which information to keep.

## 5 Managing contacts

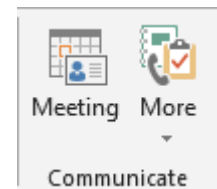
---

HOME Tab

### 5.1 Actions related to communicating



With the PEOPLE view, the E-MAIL is missing and the MORE button only shows the ASSIGN TASK option



#### 5.1.1 E-mail

A new message is created but caution : if a contact has more than one email addresses, they are all set as main recipients.

### 5.1.2 Meeting

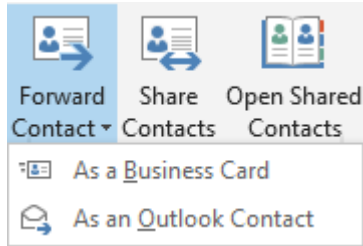
Setting a meeting with the contact.

### 5.1.3 More

#### *Assign Task*

*Call* : to call the contact – provided that the corresponding hardware has been installed (earphones, headphones, microphone ...) which is not so common ...

### 5.1.4 Forward Contact



#### **As a Business Card**

The principle is identical to joining a business card to a signature : a business card is inserted as a picture in the body text and includes the most pertinent information linked to the contact. And the full contact details are attached to the mail as a .vcf file whose structure is compatible with all mailers.

*To mention* : the notes you may have typed are never included in the vcf card

#### **As an Outlook Contact**

Corresponds to inserting a contact into a message : INSERT Tab – ATTACH ITEM button. But caution the contact is attached as an Outlook item. Some mailers have saving problems with the Outlook format. In case of doubt, prefer the Vcard format.

## 5.2 Internal managing : « sorting out »

#### *Subfolders*

Create a new folder as you would in the Windows Explorer  
Click and drag the contact into the required folder

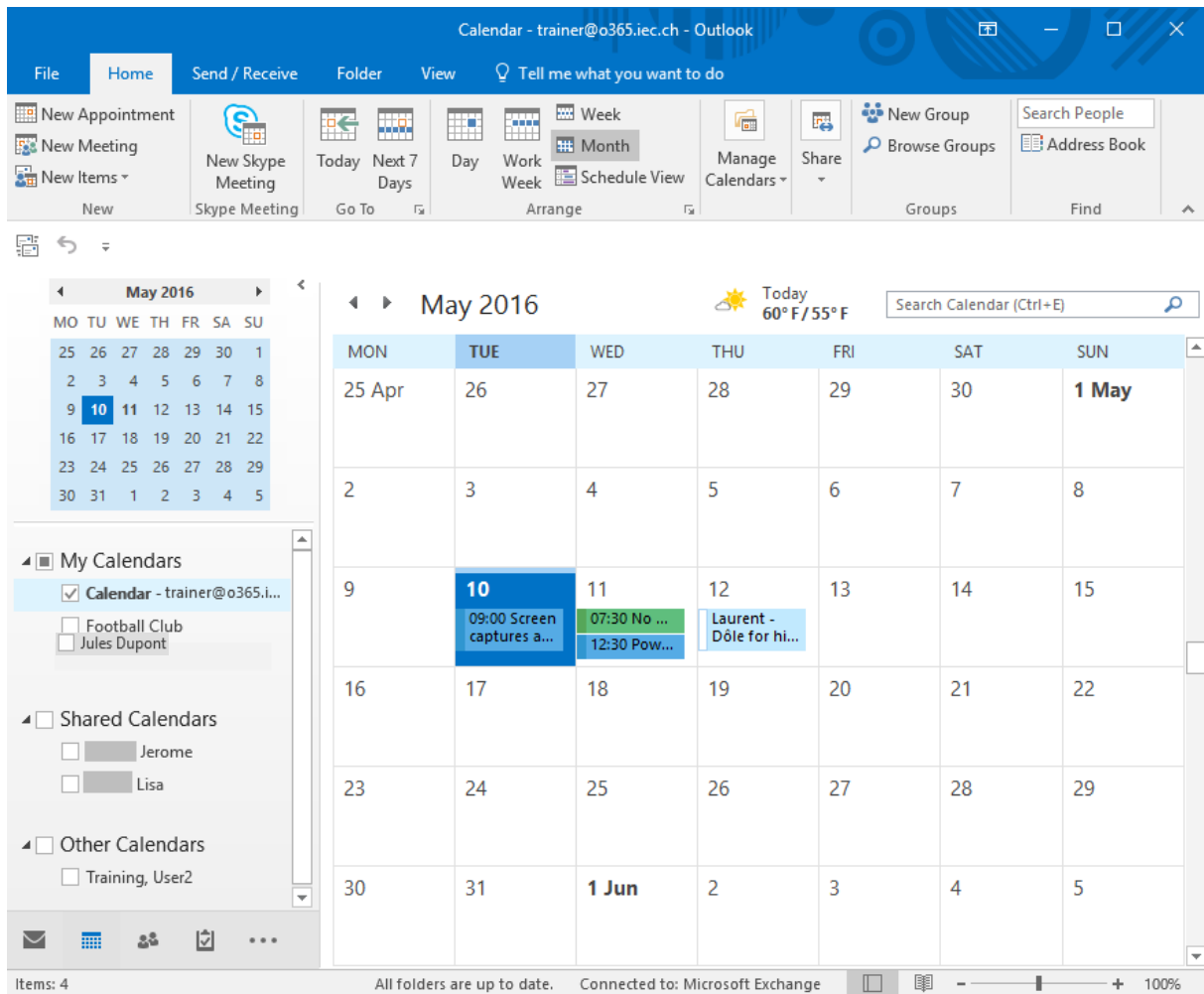
*You can also create a subfolder, rename or copy it through the FOLDER Tab buttons.*

#### *Categories*

You may assign a category to each contact. Then choose a table view and arrange the list using categories as criteria. (VIEW Tab)

What should you choose ? If your mailbox is linked to your smartphone, caution with the trademark. For instance Iphones display subfolders but don't show categories while a tested HTC does exactly the contrary. And Windows Phone does nothing !

# CALENDAR



## 1 Navigation Pane

### 1.1 The Date Navigator

- One row by default  
*Drag the separation at the bottom of the Navigator to display more rows. The possibilities depend on the window size.*
- Click on the triangle – on each side – to navigate in the past or in the future.  
Quick navigation by month if you click on the month name and hold the click



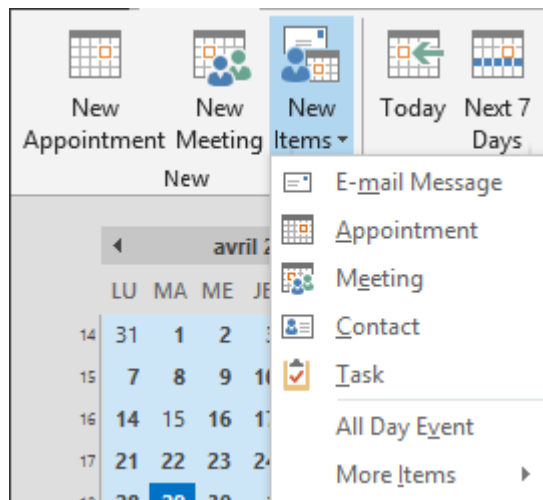
## 1.2 List of calendars to which you have an access

<b>My Calendars</b> <a href="#">Calendar – trainer ...</a>  <a href="#">Football Club</a>	<i>Calendar</i> Main Calendar – connected to Exchange to read your available time, planning meetings ...  <i>Personal Calendars</i> Created by the user but not connected to Exchange or calendars from other mailboxes such as Gmail, Hotmail ...
<b>Shared Calendars</b> <a href="#">X Jerome – X Lisa</a>	Exchange Calendars whose owners have granted you access rights.
<b>Other Calendars</b> <a href="#">Training, User 2</a>  <a href="#">Calendar (not on the screen capture)</a>	Calendar that a user has sent to you via the option SEND CALENDAR VIA E-MAIL. You have received an .ics file and opened it. (Explanations on page 105)  Calendar from someone whose calendar is hosted with Microsoft on one of their Exchange Servers and that has granted you rights

\* The above table corresponds to a default tree but in fact you can drag a calendar where you wish

## 2 Creating new items


- HOME Tab – NEW Group



### 2.1 A standard appointment

A blocked time slot, involving one or more people set without the help of Exchange Server. The input form is as usual : subject, location, time slot ...

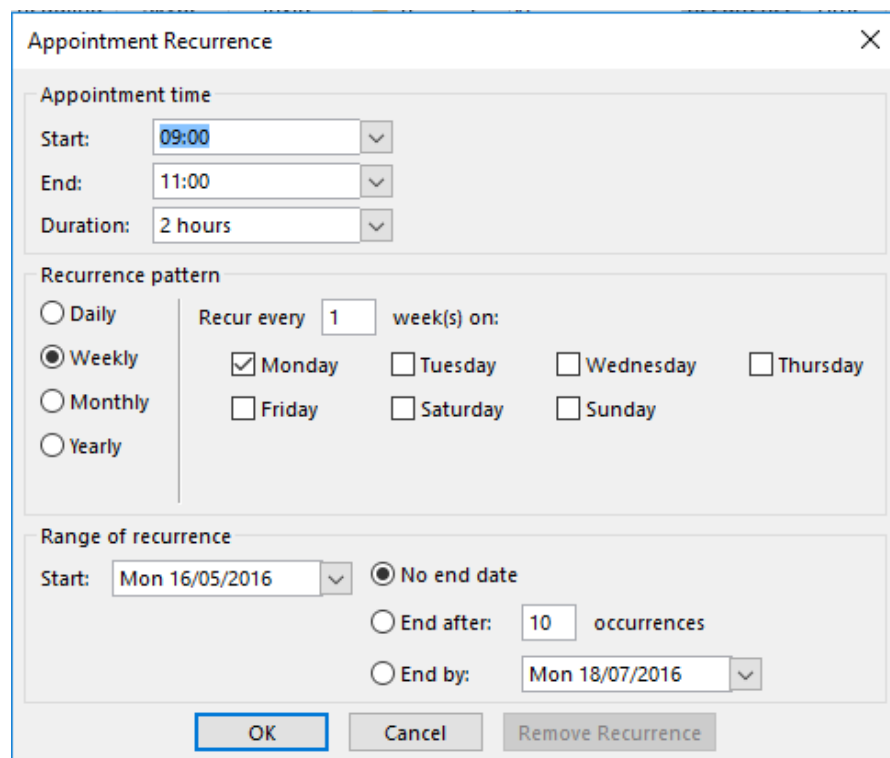
Interesting or important :

- ✓ Exchange availability : appointments = *Busy* (by default in blue)  
Other choices are available such as *Out of the Office* (violet). Note for *Working Elsewhere* (only works with a 2013 Exchange Server. If you are working with a 2010 Server, the slot simply does not show on the Scheduling Assistant when someone checks your availability for a meeting request.
- ✓ Ticking  **All day event** turns the appointment into an *All Day Event*
- ✓ If the appointment is private, simply click on the following button  **Private** (APPOINTMENT Tab – TAGS Group).

## 2.2 Recurring appointment



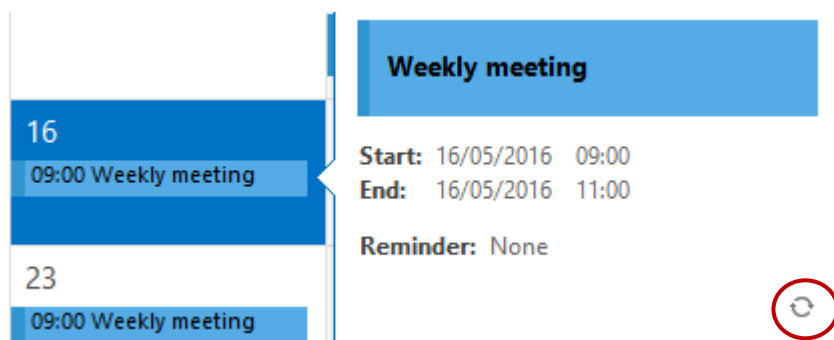
(APPOINTMENT Tab – OPTIONS Group)



The dialog box is titled "Appointment Recurrence" and contains the following sections:

- Appointment time:** Start: 09:00, End: 11:00, Duration: 2 hours.
- Recurrence pattern:** Radio buttons for Daily, Weekly (selected), Monthly, and Yearly. "Recur every" is set to 1 week(s) on. Days of the week are listed with checkboxes: Monday (checked), Tuesday, Wednesday, Thursday, Friday, Saturday, and Sunday.
- Range of recurrence:** Start: Mon 16/05/2016. Options include "No end date" (selected), "End after: 10 occurrences", and "End by: Mon 18/07/2016".
- Buttons: OK, Cancel, and Remove Recurrence.

The appointment displays the following icon :




The appointment card shows a calendar view with dates 16 and 23. The card for the 16th is titled "Weekly meeting" and displays the following details:

- Start:** 16/05/2016 09:00
- End:** 16/05/2016 11:00
- Reminder:** None

A red circle highlights a refresh icon in the bottom right corner of the card.

**Note :** if the icon is crossed, it means that this occurrence has been modified.

 Managing recurring appointments proves to be a little bit heavy : if you delete one given occurrence no magical undo, if you need to re-set the occurrence, a message warns you that all *exceptions* will be lost ...



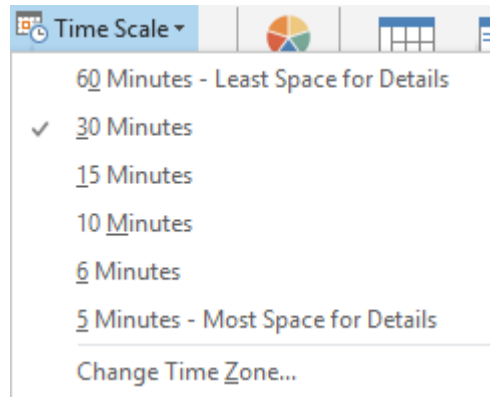
## 2.3 Creating an appointment abroad but from Switzerland (different time zone)

### 2.3.1 Setting an additional time zone and display it

- Display the Calendar in DAY view
- Right click the time scale (on the left)




- VIEW Tab – ARRANGEMENT Group – Drop-down list of the TIME SCALE Button



- CHANGE TIME ZONE Option
- The dialog box of the OUTLOOK OPTIONS (FILE) is displayed

#### Time zones


 Label:   
 Time zone: (UTC+01:00) Amsterdam, Berlin, Bern, Rome, Stockholm, Vienna

---

Show a second time zone  
 Label:   
 Time zone: (UTC-08:00) Baja California

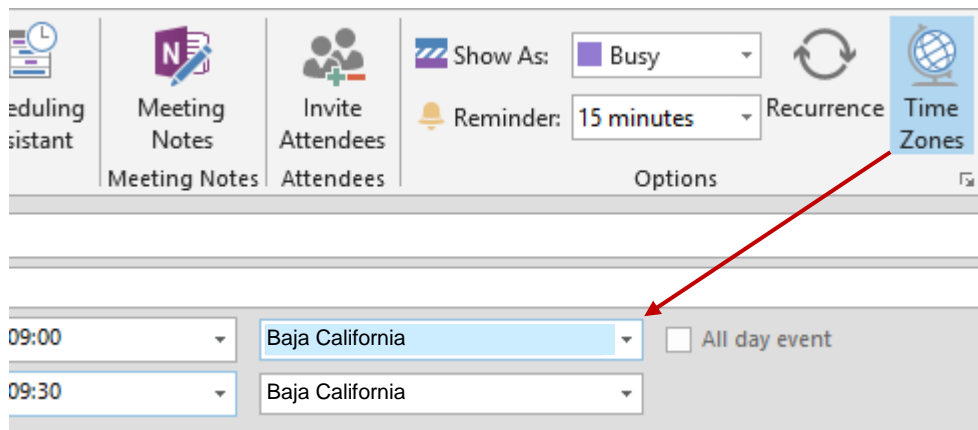
Result will be visible only in DAY and WEEK view.

		VEND
		16
L.A.	CH	
00	09	
01	10	
02	11	ment

### 2.3.2 Creating an appointment in the additional time zone

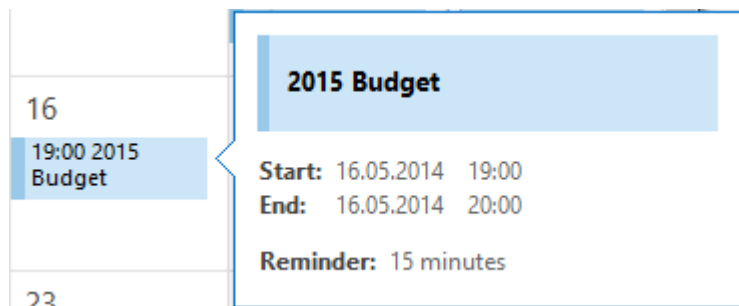
- Create the appointment

- Click on the TIME ZONES button



A textbox to indicate the time zone is displayed next to the time slots. Indicate the *local* time (in the screen capture, the time in Kathmandu).

In your calendar, the appointment will be displayed at the corresponding Swiss time. If you edit the appointment, you will notice that the local time remains indicated.



Once in the foreign country : don't change your PC time. Simply switch the time zone in Outlook (FILE – OPTIONS - CALENDAR Category – TIME ZONES Section). All your appointments are displayed at the correct local time.

## 2.4 Event

Note : if you double-click onto an empty area in the Calendar, an event is automatically created

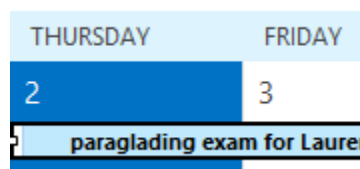
It lasts a whole day.

It is also blocked without the help of Exchange Server

By default your availability remains *Free*. It is up to you to change this.

*Free* : the event is just an information displayed at the top of the day

Example in WEEK view :



*Busy or Out of the office* : the event blocks the whole day and will be displayed in *blue* for busy and in *violet* for out of the office.

2	23
SICILE !!!!!!!	

## 2.5 Meeting

It is a time slot that involves one or more people but that has been set up with the help of Exchange Server. Here below a brief reminder of the required steps :

### 1 Creating the meeting

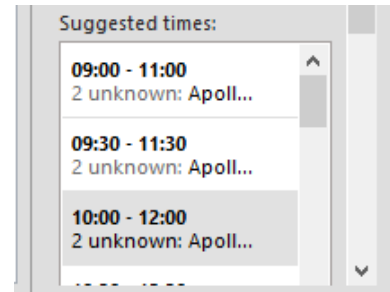
NEW MEETING Button or NEW APPOINTMENT + INVITE ATTENDEES

→ *Response Options*

*New time proposals can prove heavy for the meeting organizer when every participant proposes a new time slot ...*

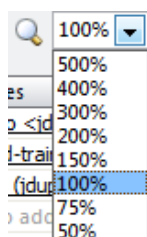
The right pane displays :

- *Available resources (conference room, flipchart, beamer)* : can be « invited » provided they have a mailbox on the server. If the room is available at the required time it will automatically send an accept message (and a reject one if not). How is the meeting displayed in the room calendar ? it indicates the name of the organizer.
- *Suggested times* : the server « comments » the hours before and after the set time and indicates whether the chosen time slot generates a conflict or not.



## 2 Checking the attendees availability

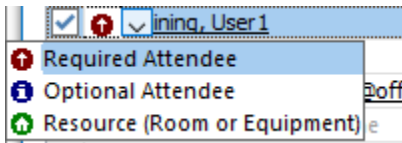
\*Hatched : the server can't read the availability



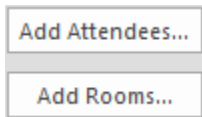
Usual zooming options. Interesting to mention that 100% generates a Day View and 50% a Week View.



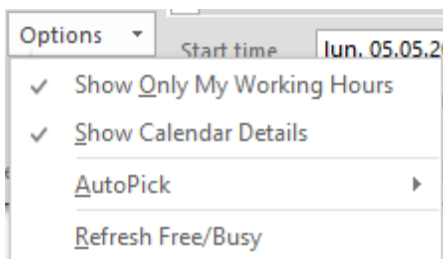
Ticked or not : decide whether to send or not a meeting request to the attendee. Can be useful is something has been arranged over the phone for example.



To change the status of a given attendee.



The usual recipients dialog box. You can select any user connected to the Exchange Server (Global Address List) or one of your external contacts.



Viewing options :

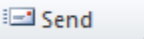
Working Hours .to exclude 6:00, 7:00 ...  
Calendar Details (according to given rights of course)



Refresh/Busy : to update the server information

Right Pane

Resources, suggested times ....

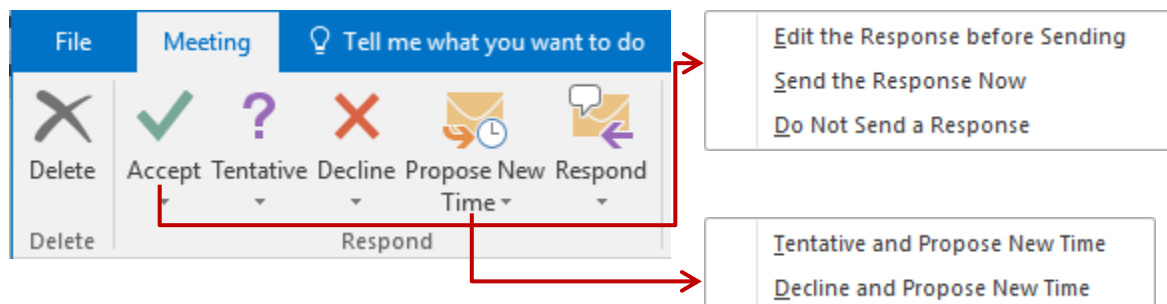
If everything is OK : click on  Send

## 🔍 Recipient

The meeting request appears into his or her Inbox folder.

Various replies can be chosen (directly into the message header in the Reading Pane or inside the message if it is opened)

*Until you actually reply to the request, the meeting will be displayed in your calendar as a tentative item, in order to avoid conflicts if you receive another meeting request for the same time slot.*



Note : you are warned if there is a conflict

Un instant view of your calendar is inserted into the meeting request body text. This will help you to better visualize the possible appointments before or after the proposed meeting.

mar. 10.05.2016 14:26  
**Trainer, Users** <trainer@o365.ch>  
**Migration Presentation**  
**Required** Training, User1; Training, User2; Jael De Nardo

**When** jeudi, 12 mai 2016 10:00-12:30 | **Location** Tokyo conf room

L.A.	CH	Event
		Arrivée Lydia et sarah
00	09	Budget Meeting My office
01	10	Migration Presentation Trainer, Users

By default, Outlook removes the meeting request from your Inbox folder once you have replied to it. The option that controls this is the following : FILE – OPTIONS – MAIL Category – SEND MESSAGES Section – Option

Delete meeting requests and notifications from Inbox after responding

#### 4 Follow-up by the meeting organizer

The organizer collects all the replies (in his/her Inbox)

The organizer can click on the TRACKING button :

The following responses to this meeting have been received:

Name	Attendance	Response
Trainer, Users	Meeting Organizer	None
Training, User1	Required Attendee	Accepted
Training, User2	Required Attendee	Accepted
Jael De Nardo (jdenardo@office.ch)	Required Attendee	None
Click here to add a name		<input type="checkbox"/> Accepted <input type="checkbox"/> Declined <input type="checkbox"/> Tentative <input checked="" type="checkbox"/> None

Note : the answer can be chosen manually

#### 5 Up-dates and deletion

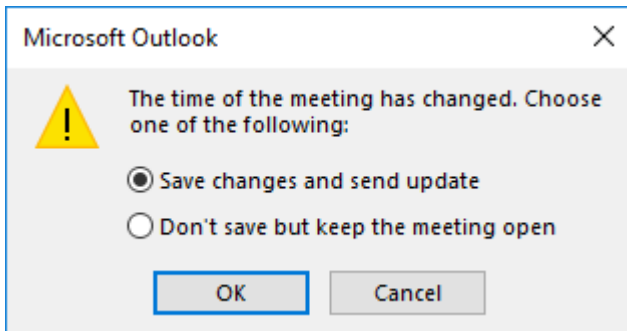
Major changes : (changing the date, the time ...)

A standard meeting request will be sent that requires acceptance, reject or new proposition).

Minor changes (adding attendees, changing the conference room ...)

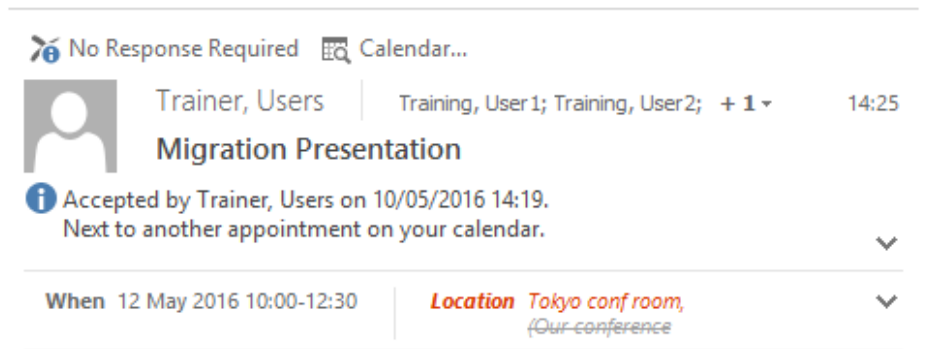
The organizer needs to add attendees

Before sending the new meeting requests, Outlook displays the following dialog box :

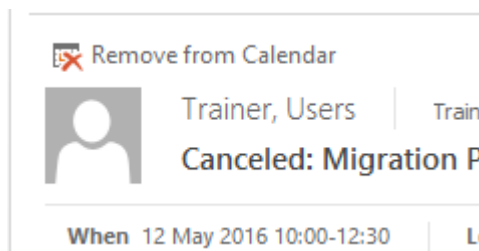
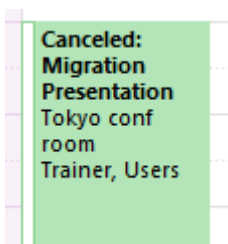


Modifying the location : no dialog box

Only an information message is sent :



Deletion : by default the meeting REMAINS in your calendar, preceded by the information CANCELED. But the cancellation message gives you the possibility to REMOVE the meeting from your calendar. Up to you.

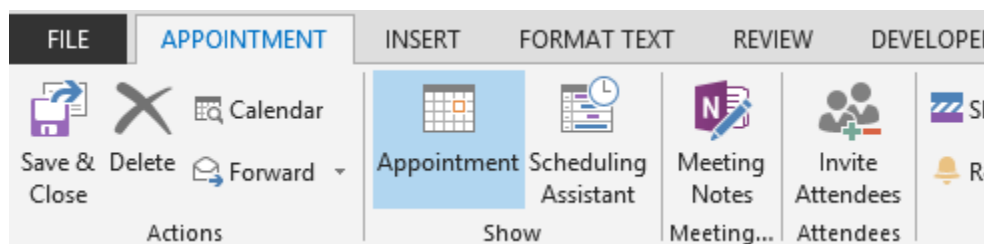


### 3 Managing items

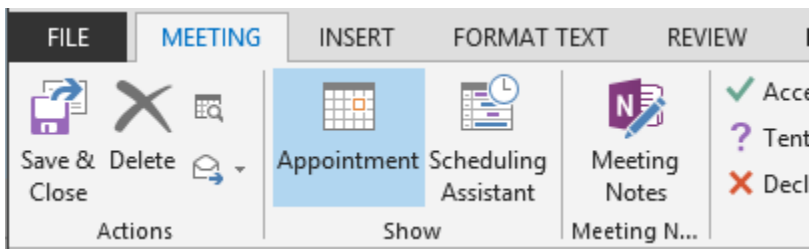
#### 3.1 Tabs specific to the selected item

This is particular to the Calendar component : a tab with specific commands related the selected item is automatically displayed in the Ribbon :

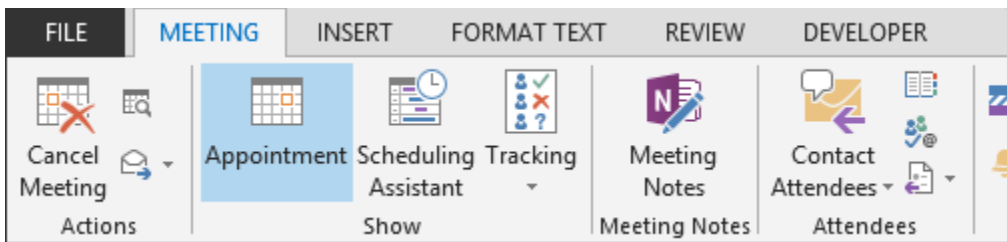
Standard / Recurring appointment



Meeting : attendee



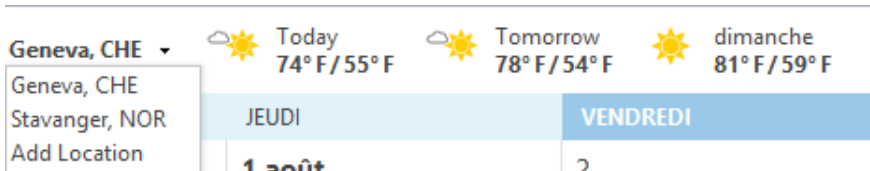
Meeting : organizer



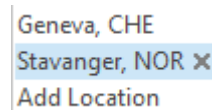
## 4 Special viewing commands

### 4.1 The weather here and elsewhere

You can see at the top of your Calendar some buttons showing the weather forecasts for the location of your choice :

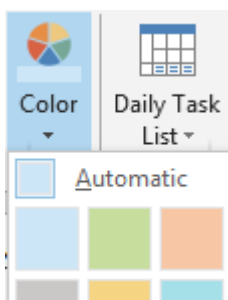


Removing a city : point it in the above list and a deleting cross will be displayed at the end of its name.



### 4.2 Calendar background color

- VIEW Tab – COLOR Group

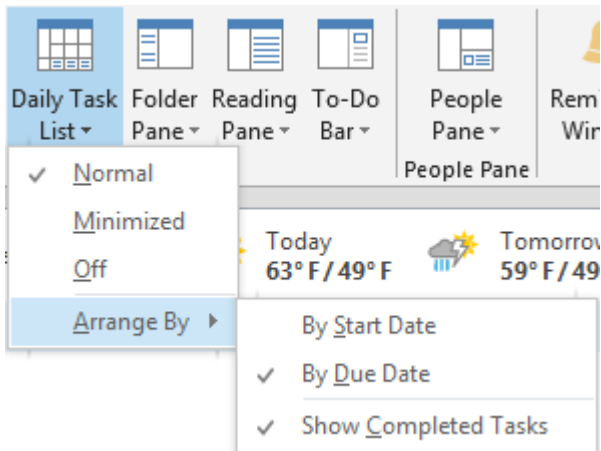


The button will be displayed provided the current view is not a table (List or Active)



### 4.3 The Daily Task List

- VIEW Tab – LAYOUT Group



It is not equivalent to the To-Do List, which groups all active tasks (tasks with or without due date, late tasks but no completed tasks).

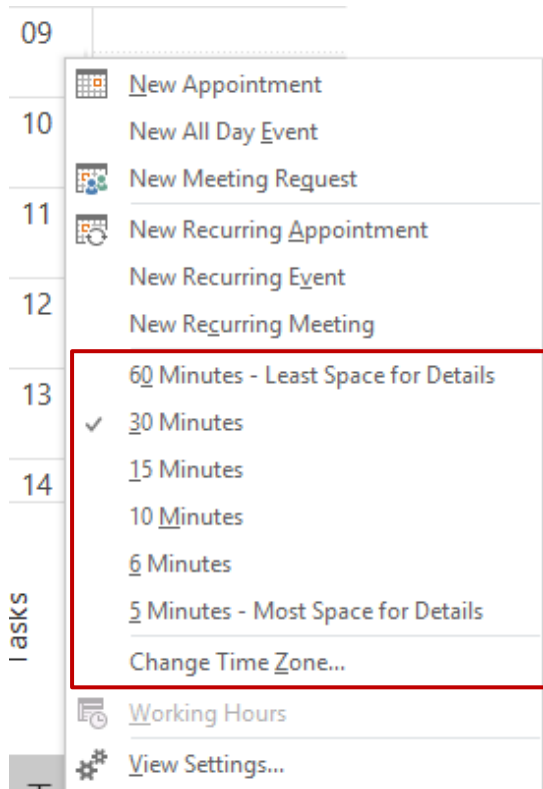
The Daily Task List can be a complement to the To-Do Bar. Its « scatters » flagged messages and tasks according to their *due date*. Here below how they are organized, knowing that for a flag, the default due date is *today* :

- ✓ Task with a due date : its due date
- ✓ Task with no due date : not displayed
- ✓ Flagged message : displayed whatever the day (because by default a message is always flagged *for today*).
- ✓ Completed flagged message : the day it was defined as completed. It is crossed.

	Monday	Tuesday	Wednesday	Thursday	Friday
Tasks			Amélioration d... <input type="checkbox"/> ✓	ino ? iec et zeik... <input type="checkbox"/> ▶ Test flag <input type="checkbox"/> ▶	Prepare trainin... <input type="checkbox"/> ▶

### 4.4 Setting different time slots


- Choose the DAY view mode for the Calendar
- Right click on the Time Zone (on the left)



*Time slots* : 30 minutes by default but you may opt for something else

*Time Zone* : usually you do not want to *change* the time zone but you would like to *add* one. The command leads you to the OPTIONS dialog box. Choose carefully. An example :

**Time zones**


 Label:   
 Time zone: (UTC+01:00) Amsterdam, Berlin, Bern, Rome, Stockholm, Vienna ▼

---

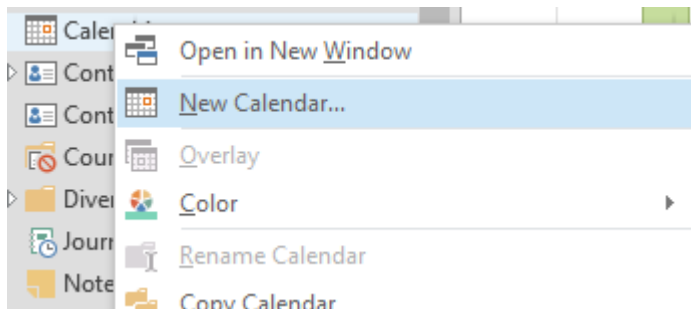
Show a second time zone  
 Label:   
 Time zone: (UTC-08:00) Baja California ▼

Opt for short labels as this will help readability

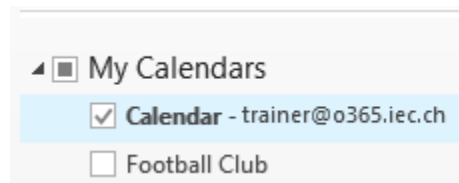
L.A.	CH
00	09
01	10

## 5 Creating a personal calendar (off Exchange)

Right click the main calendar folder and select the NEW CALENDAR command



The new calendar will be listed in the normal CALENDAR view



This calendar will not synchronize with Exchange and consequently there will be no sharing options for it. But apart from this, it can be worked just like a normal calendar.

## 6 Customizing options

### FILE – OPTIONS – CALENDAR Category

Change the settings for calendars, meetings, and time zones.

#### Work time

Work hours:

Start time: 08:00

End time: 17:00

Work week:  dim.  lun.  mar.  mer.  jeu.  ven.  sam.

First day of week: lundi

First week of year: First 4-day week

#### Calendar options

Default reminders: 15 minutes

Allow attendees to propose new times for meetings

Use this response when proposing a new meeting time: ? Tentative

Add holidays to the Calendar: [Add Holidays...](#)

Change the permissions for viewing Free/Busy information: [Free/Busy Options...](#)

Enable an alternate calendar

English Gregorian

When sending meeting requests outside of your organization, use the iCalendar format

Show bell icon on the calendar for appointments and meetings with reminders

#### Display options

Default calendar color:

Use this color on all calendars

Date Navigator font: [Font...](#) 8 pt. Segoe UI

Show Click to Add prompts in calendar

Show week numbers in the month view and in the Date Navigator

When in Schedule view, show free appointments

- ✓ Setting your daily working hours and also the days you are effectively at the office
- ✓ A reminder for any new created item ?
- ✓ **Adding holidays for a given country**

Choose the country but **caution** :

Added holidays may not meet your expectations ! For Switzerland the calendar will show *San José on March 19th, Saint Peter and Saint Paul June 29th, National Day on August 1st ... but no trace of the Jeûne Fédéral nor the Jeûne Genevois ...*

The command does not work like a switch. No DELETE option or button. And if you select the country once more, you will *re-install* them and the calendar will show them twice ! To remove them : choose a table view and select the *by category* arrangement. They will be grouped and you will be able to delete them easily.

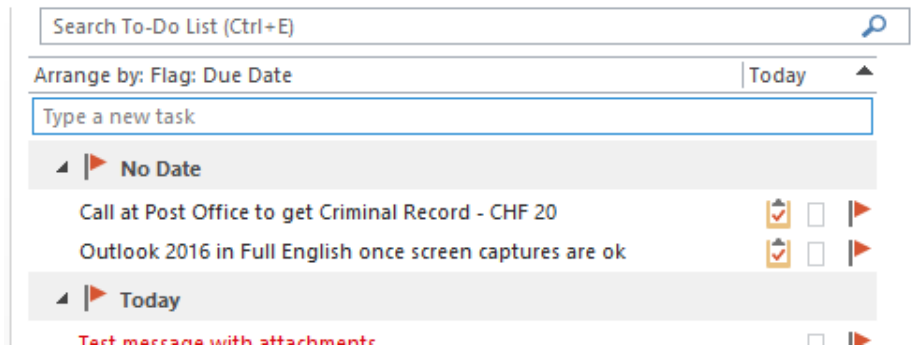
---

# TASKS

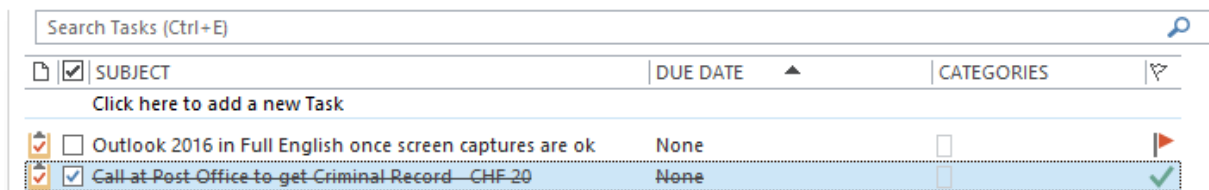
---

With the To-Do Bar you can “flag” messages or create new tasks very easily. This has become so handy that users work far less in the main tasks component. Nevertheless, the tasks component provides interesting additional info or actions.

*To-Do List (a simple list, sorted out by due date and in groups) :*



*Tasks (this means without the flagged messages) :*



---

## 1 Navigation Pane

---

It can help to make the difference between the *To-Do list* (its contents is identical to the To-Do Bar) and the « real » *Tasks*.

---

## 2 Component area

---

The difference between a flagged message and a task is shown by the icon preceding the name and also the column *In Folder* that indicates in which folder the item is stored.

The To-Do Bar width also implies that some information is often hidden, which is not the case in the tasks window (it can display far more information).

## 3 Icons

Some common icons :



Simple task



Recurring task.

As a simple or detailed list



or



Indicates if the task is completed or not. If you click on the box, the task will automatically be declared as completed and crossed out.

## 4 Creating a task

### 4.1 Standard task

HOME Tab – NEW Group – NEW TASK Button

A standard task form will be displayed to type information such as :

- ✓ Name and nature of the task
- ✓ Start date and Due date
- ✓ Priority, % Complete
- ✓ Is this task private ?
- ✓ Importance
- ✓ Category
- ✓ Etc ...

### 4.2 Recurring task

When you creating the task or when editing one : click on the RECURRENCE button :

#### *Regenerate new task*

As soon as the task is declared as complete (100%) – a new task – identical and with the same recurrence settings – is automatically created.

## 5 Managing tasks

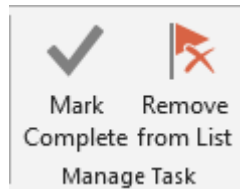
---

As for messages : (HOME Tab and FOLDER Tab)

- ✓ Delete
- ✓ Forward (an Outlook message is created and the task is added as an attachment)
- ✓ Create sub-folders
- ✓ Move or copy a task to a given sub-folder
- ✓ Etc ...

Specific to tasks :

HOME Tab

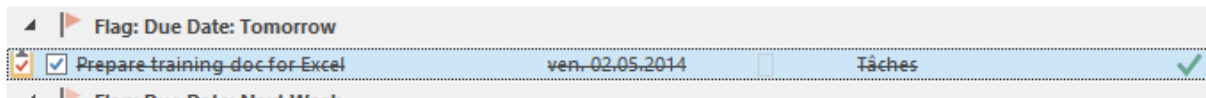


*You have selected a message*

Mark Complete or Remove from List are identical

*You have selected a "real" task*

Mark Complete : the task is removed from the List but it stays in the tasks component. It will display a green ✓ tick mark to show that it has been completed and depending on the view it can also be crossed out.



Remove from List : the task is fully removed

## 6 Assigning a task

---

The principle is very much similar to setting a meeting. Here below the steps in brief :

- Create the task and assign it to a user **A**  
*The task is sent as a Task Request (mail)*
- **A** replies to the task request – for example he/she *accepts*  
*At this moment the task is assigned : it belongs to him/her*
- The sender receives the accept message  
*A copy of the task remains in his/her task component. It will be updated when the user **A** indicate the progression in percentage, when the user declare it completed ... . The sender will receive a Task Report message.*

The fact that the report is generated only when the user manually indicates the task progression certainly explains when very few users *assign task* through Outlook ...






---

# NOTES

---

The Notes component is not very much used. It is a shame because it helps to create and memorize information that is neither related to time (consequently not a Calendar item) or related to an action to perform (consequently not a Tasks item).

Here below a screen capture of some information I have memorized as notes :

 CNTFS - Jael - site ursaf.fr	lun.
 CNTFS - Laurent - site ursaf.fr	lun.
 Crédit Agricole - 93915390050 accès Laurent : les deux dates - accès Jael : date clé tj 20ème siècle et 00	dim
 Crédit Agricole - Code sécurisé pour fin transaction MasterCard en ligne : roi plus la première des deux dates	mer
 Crédit Agricole - Vol ou perte carte : tel 04.50.27.73.74	ven.
 Dentiste spécialiste dents de sagesse : Roland Courteau	mer
 English vocabulary	dim

 No confidential info « in clear » and that could end up in bad hands

## Creating and managing Notes

The standard commands ... we hope they have become common to you ...

- HOME Tab  
Create a new note, preset views, assign a category etc ...
- FOLDER Tab  
Create a new folder, rename it, copy it ...
- VIEW Tab  
Advanced view settings, arrange in groups ...

## **Latest 2016 info**

Microsoft encourages users to stop using the component and rather switch to OneNote. They say they will shortly stop supporting it.



# PRINTING

Now that smartphones, tablets ... have become common .. printing one or more Outlook items is rarely a necessity. Nevertheless here below a few points about printing :

## 1 A message (example fully developed)

- Open the message – FILE – PRINT. *MEMO mode is the only one available*
- Select the message from a list of messages. *You can choose between MEMO and TABLE*

The screenshot shows the Outlook print interface. On the left, there is a 'Print' button with a printer icon. Below it, the selected printer is 'HPF743F1 (HP Officejet Pro...)' with a status of 'Ready'. There is a 'Print Options' button. Under 'Settings', two options are shown: 'Table Style' and 'Memo Style', with 'Memo Style' currently selected. On the right, a preview of an email message is shown. The message is from 'Joël De Nardo' and contains text in French, including a meeting confirmation and a note about a report.

### The PRINT OPTIONS Button

The screenshot shows the 'Print' dialog box. It includes a 'Printer' section with the name 'HP Officejet Pro X576dw MFP PCL 6 (réseau)', status, type, and location. There is a 'Print to file' checkbox. The 'Print style' section shows 'Table Style' and 'Memo Style' (selected), with 'Page Setup...' and 'Define Styles..' buttons. The 'Page range' section has radio buttons for 'All' (selected) and 'Pages:'. The 'Print options' section has a checkbox for 'Print attached files'. The 'Copies' section has 'Number of pages' set to 'All', 'Number of copies' set to '1', and a 'Collate copies' checkbox. A page range indicator shows pages 1, 2, and 3. At the bottom are 'Print', 'Preview', and 'Cancel' buttons.

Standard options such as

- Access to the printer's properties
  - Pages to print
  - Should attached files be printed ?
  - Number of copies
- etc ...

## The PAGE SETUP Button (3 tabs)

FORMAT : size of the font

The screenshot shows the 'Format' tab of the 'Page Setup' dialog box. At the top, there are three tabs: 'Format', 'Paper', and 'Header/Footer'. Below the tabs is a 'Preview' window showing a document page. The main area is divided into 'Options' (which is empty) and 'Fonts'. Under 'Fonts', there are two sections: 'Title' with a text box containing '12 pt. Segoe UI' and a 'Font...' button, and 'Fields' with a text box containing '10 pt. Segoe UI' and a 'Font...' button. Below these is a 'Shading' section with a checked checkbox labeled 'Print using gray shading'.

PAPER : format (portrait-landscape), margins

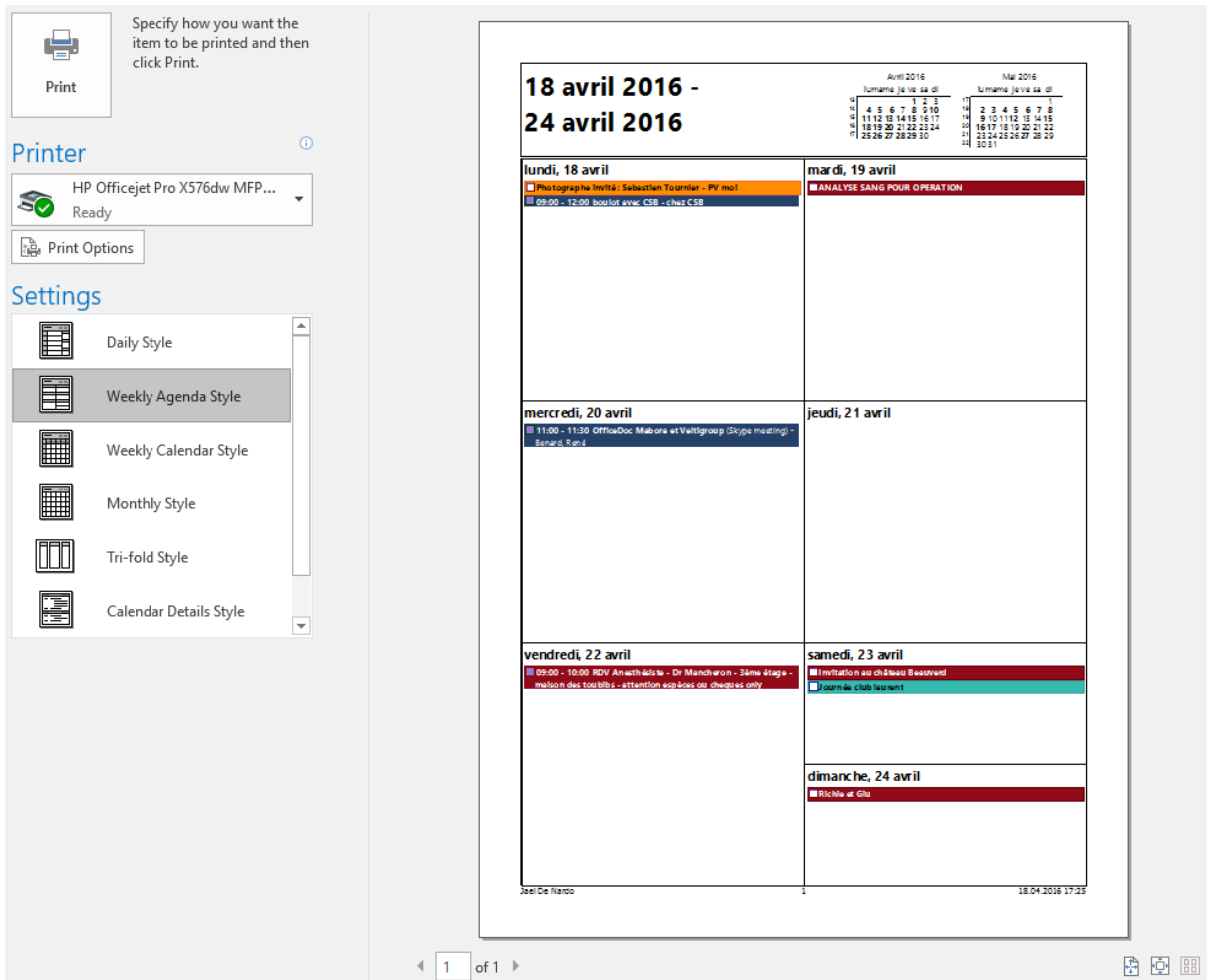
The screenshot shows the 'Paper' tab of the 'Page Setup' dialog box. It is divided into 'Paper' and 'Page' sections. The 'Paper' section includes a 'Type' dropdown menu with options like 'Lettre US (215,9 x 279,4 mm)', 'Legal US', 'Statement US', 'Exécutif US (18,42 x 26,67 cm)', 'A3', and 'A4' (selected). Below this are 'Dimensions' fields for 'Width' (21.00 cm) and 'Height' (29.70 cm), and a 'Paper source' dropdown set to 'Default Paper Tray ( Sélection automatique)'. The 'Margins' section has four input fields: 'Top' (1.30 cm), 'Left' (1.30 cm), 'Bottom' (1.30 cm), and 'Right' (1.30 cm). The 'Page' section includes a 'Size' dropdown menu with options like 'A4', 'A4 Half', 'Billfold', 'Pocket', '1/2 sheet booklet', and '1/4 sheet booklet'. Below this are 'Dimensions' fields for 'Width' (21.00 cm) and 'Height' (29.70 cm). The 'Orientation' section shows a diagram of a page labeled 'A' and two radio buttons: 'Portrait' (selected) and 'Landscape'.

HEADER / FOOTER : codes and their position on the printed page

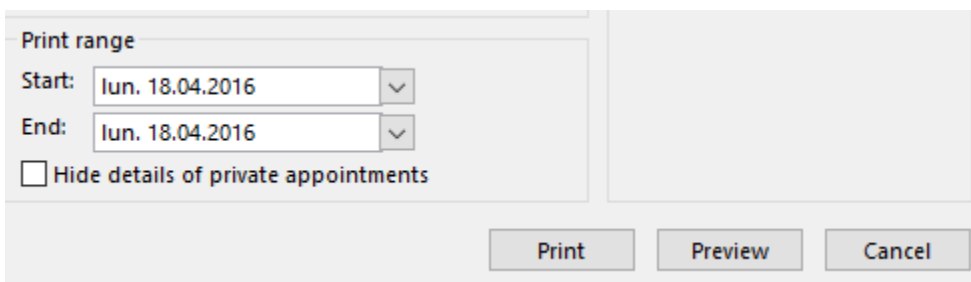
The screenshot shows the 'Header/Footer' tab of the 'Page Setup' dialog box. It is divided into 'Header' and 'Footer' sections. The 'Header' section has a text box containing '8 pt. Tahoma' and a 'Font...' button. Below this are three empty rectangular boxes representing the header area. The 'Footer' section has a text box containing '8 pt. Tahoma' and a 'Font...' button. Below this is a text box containing '[Page #]' and two empty rectangular boxes representing the footer area. At the bottom of the dialog box, there is a small toolbar with icons for 'Print', 'Cancel', 'OK', 'Reset', and 'Help'.

## 2 Calendar

- FILE - PRINT – Select the print style




- PRINT OPTIONS Button  
The same dialog box as for a message but adding the possibility to set a range of dates :



- PAGE SETUP Button  
The same dialog box as for a message but adding some settings specific to the Calendar : printing the tasks or not, daily hours ...

Format | Paper | Header/Footer

Preview:



**Options**

Arrange days:  Top to bottom  
 Left to right

Layout: 1 page/week

Tasks: No Tasks

Include:  Notes area (blank)  
 Notes area (lined)

Print from: 07:00

Print to: 19:00

Only Print Workdays

**Fonts**

Date headings: 24 pt. Segoe UI [Font...]

Appointments: 8 pt. Segoe UI [Font...]


**Shading**

Print using gray shading

### 3 Contacts

**Important** : the printing possibilities depend on the active view mode : Business card ? Table ?

Business card :






 Specify how you want the item to be printed and then click Print.

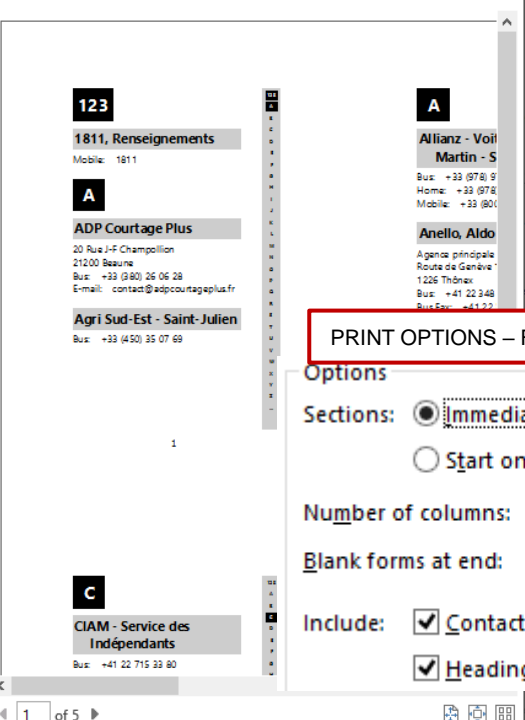
**Printer**

HPF743F1 (HP Officejet Pro...)  
Ready

Print Options

**Settings**

-  Card Style
-  Small Booklet Style
-  Medium Booklet Style
-  Memo Style
-  Phone Directory Style



**PRINT OPTIONS – FORMAT Tab**

**Options**

Sections:  Immediately follow each other  
 Start on a new page

Number of columns: 1

Blank forms at end: 2

Include:  Contact index on side  
 Headings for each letter

Table (Phone – List) :



Specify how you want the item to be printed and then click Print.

Printer



Print Options

Settings

Table Style

Memo Style

ID#	FILE AS	COMPANY	COUNTRY...	BUSINESS PH...	MOBILE PHO...
Company (name): 28 Items					
1	No tel sans				+41 622 66 12 12
2	NIT Madhe				951
3	Montage Ora Ubr				+41 800 22 64 64
4	CH Madhe				
5	Conzareth, Nano-Peter	Sidao		+41 27 622 40 12	
6	Telo de anelito generale	Ranoo		+22 820 49 11 26	
7	Amfom - Bp l'edon jum l'ine Pulso	Ranoo		+22 820 46 78 28	
8	Ullanz - Vialoz - Vialoz, Vialoz - Saa			+22 878 878 000	+22 (800) 103 103
9	Wator sans assistance			+22 821 62 62	
10	Woroo				162
11	Infrouzo				162
12	Combar				+41 800 80 80 80
13	1811, Ramalignants				9111
14	Madhe - Paj - Ralanz Vilar			+41 22 721 40 01	
15	Hain - Salar de Bjeunfo	Sidao		+41 22 800 40 10	
16	P.L. SOS				
17	London-Tidoo-Thoum-Renel			+44 (842) 52 6722	
18	Gourm, à dan Haino	Shigapoo			
19	Wanago - Hala Ranaloan				+22 7 87 96 26 13
20	Agri-Sou-Fer - Sain-Jullien			+22 820 25 07 26	
21	Egri, Douk	Sidao		+41 21 145 10 20	
22	Madhe - Sabino Baco	Sidao		+41 22 800 21 11	+41 79 612 71 76
23	La Ferme de Mhaqhtal, Nagler			+22 820 49 61 43	
24	Roussau, Ecole Collège Jean-Macquer			+22 820 49 28 21	
25	Ozualé - Naal Boléon	Sidao			+41 79 204 12 21
26	La Toon - Hégid			+41 22 719 61 11	
27	de Neun - Takakalho Vardho/Palno	Sidao		+22 820 76 70 72	
28	Montana, SOS			+41 27 622 40 12	+41 79 422 04 11
Company (name): 62 Items					
29	Identific Muruello			+22 (7) 42 18 24 0	
30	JBP Courage Plus	Ranoo		+22 860 26 06 26	
31	Madhe - Cabinet de radiologie de			+22 820 25 11 26	
32	Clinique Vézirhalie-Mu-TNS	Ranoo		+22 (7) 50 69 16 12	
33	Mhoo - SVA à Salmou			+22 820 49 20 72	
34	CLOU - Service des Indépendance			+41 22 710 44 60	
35	Célest Agriale - Senao - Snel gao			+22 800 814 810	
36	Lycée libre de Sael	Ranoo		+22 820 49 21 22	
37	Célest à grialo de Savole - Caro G.			+22 820 80 61 6	
38	Célest à grialo de Savole - Remo ou	Sidao		+22 820 27 78 75	
39	Madhe - Philippe de P' de 41	Sidao		+41 22 878 20 04	
40	Madhe - Cabinet Médical Omea			+41 22 878 20 02	
41	Madhe - Radiologie Salmou	Ranoo		+22 820 25 11 26	
42	Madhe - Joseph Borty-Morval	Suitzaland			
43	Madhe - Gyneco - Patrick Dumgo	Sidao		+41 22 247 41 14	
44	Refuge du Semnoz	Ranoo		+22 820 25 20 16	
45	Célest Agriale de Savole - Sponao	Sidao		+22 820 19 45 26	
46	Restaurant - Haeuff	Ranoo		+22 820 49 49 49	
47	Madhe - Cabinet Médical de Coll.	Ranoo		+22 820 49 07 13	
48	Restaurant - La Cressat - La Gréalier			+22 820 22 26 06	
49	Prosser, Boucherie	Ranoo		+22 (8) 50 42 60 18	
50	Madhe - Rafel-Ramjoud Vichoro	Ranoo		+22 820 06 26 26	
51	Chloral, Pablu	Suitzaland		+41 22 788 22 26	+41 79 446 81 26
52	Madhe - Saver Vamgla	Sidao		+41 22 346 42 41	
53	Madhe - Christine Sontsch	Sidao		+41 22 746 01 64	+41 79 417 14 62
54	Madhe - Ollier Stigler			+41 22 719 46 60	
55	Madhe - Oehle Corinne Vianho	Sidao		+41 22 209 00 20	

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# SHARING

---

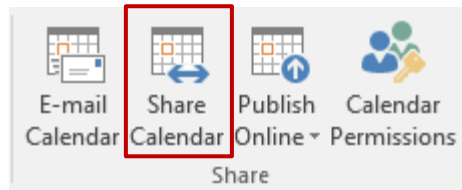
## 1 Sharing (read-only or higher right) *(Calendar, Contacts, Tasks ... but not Inbox)*

---

### 1.1 Sharing a calendar : sharing, opening, overlay mode ...

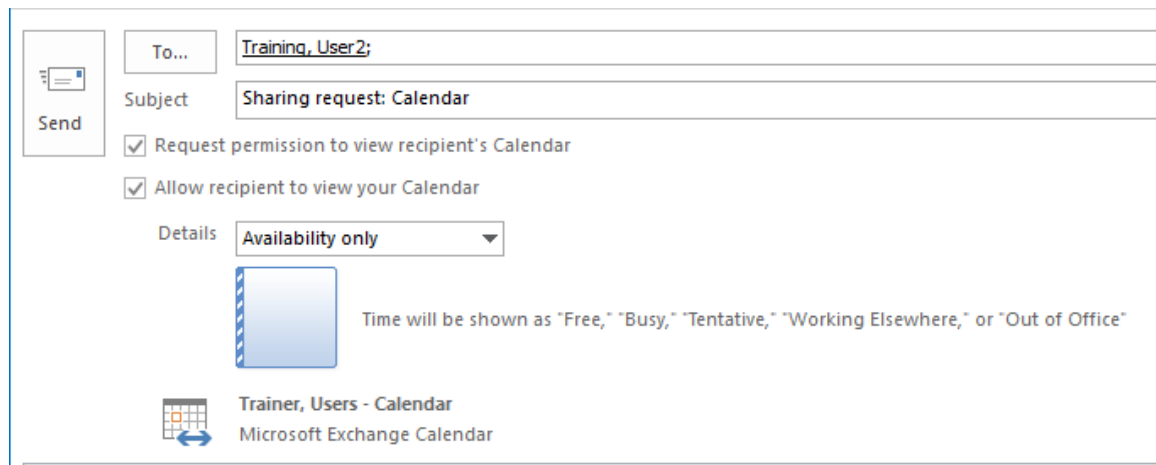
**Note** : the default Exchange setting for calendars is already a Read-Only right. This option is interesting if you want to grant a higher access right.

- HOME Tab – MANAGE CALENDARS Group or also FOLDER Tab – SHARE Group



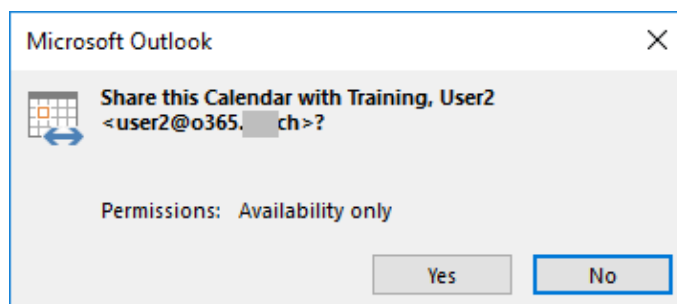
#### Option : OPEN A SHARED CALENDAR

The following message is automatically created :



As you are sharing your calendar with another user, you can also take the opportunity to make a sharing request on the recipient calendar. Availability = Read-Only. Use the drop-down list to select higher rights.

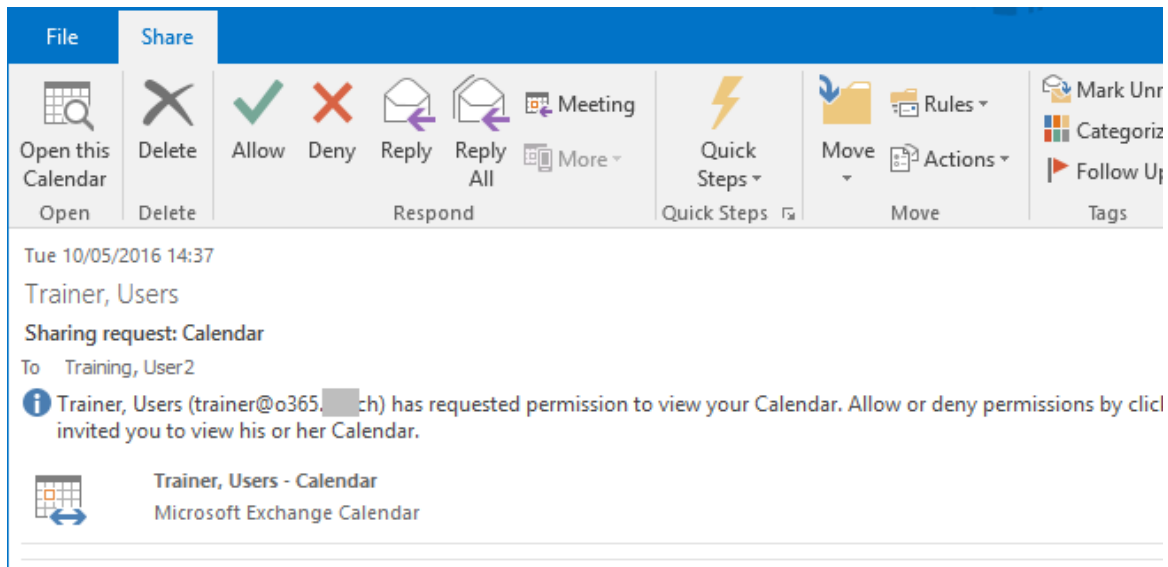
Click on the SEND button



YES = the message is sent  
NO = back to the message window

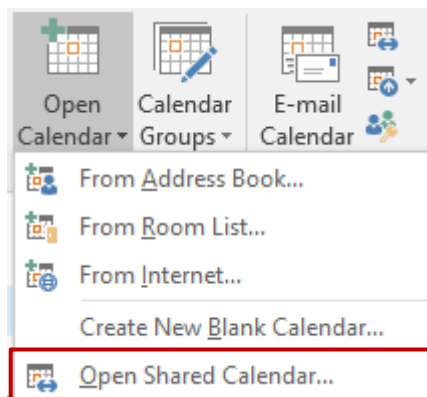
Now you are told that the sharing will be a "read-only" right.

Your sharing request : the recipient receives the request and can either accept or decline it. (in the screen capture below the real name has been hidden)



Your right will therefore be dependent on his/her choice : ALLOW or DENY

### Option : OPEN A SHARED CALENDAR



Click on the NAME button to display the usual dialog box to select recipients

 **Other method to open** : FILE – OPEN – OTHER USER'S FOLDER. Strictly identical

 **You try to open a calendar for which you have no right**

A dialog box will inform you that you do not have the required rights to open the calendar but will suggest that you send the user a sharing request. If you click on the YES button, the message shown in the screen capture on the previous page will be automatically displayed.

The requested calendar is opened :

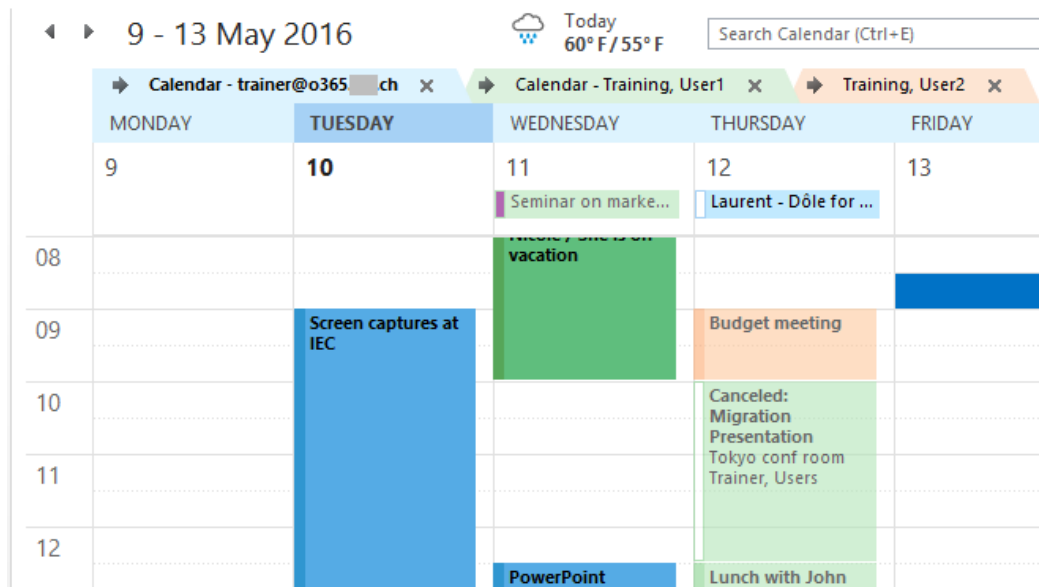


Show or hide the calendar by simply clicking on its name (Navigation Pane)

The calendar remains available for the next sessions. To close it : right click on its name and option REMOVE FROM OTHER CALENDARS

### An interesting option : the overlay mode

Display two calendars minimum : click on the arrow that precedes the name of the calendar (or right click on the calendar tab and option OVERLAY or VIEW Tab and same option)!



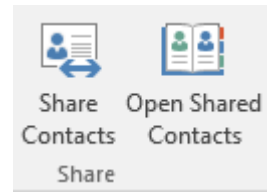
Click on your own calendar. The items belonging to the calendar in overlay mode will be placed next to yours. They will be displayed in the color assigned by Outlook to this calendar, without respecting the source color (here the assigned color is salmon). The text of the item will also be slightly dimmed to look inactive.



## 1.2 Sharing Contacts, Tasks, Notes etc ...

FOLDER Tab in the People, Tasks or Notes component

The same sharing message as for Calendar will be creating. Caution : some companies turn these sharing off and restrict sharing to Calendar only.

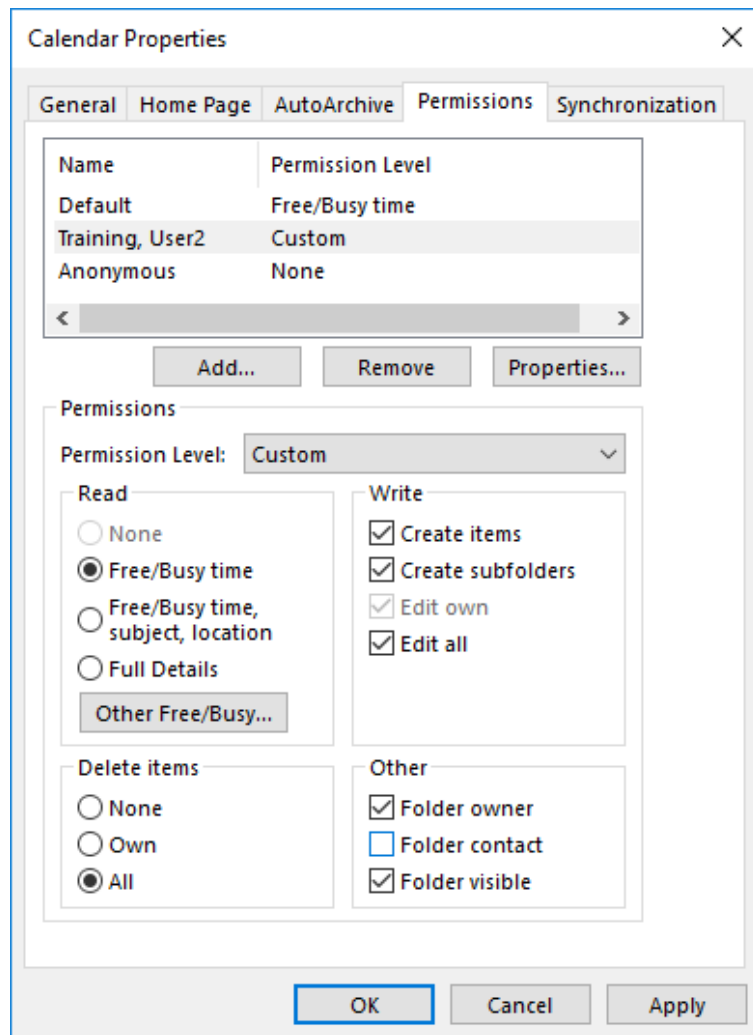
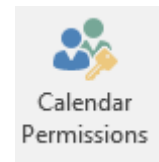


## 1.3 Higher rights – Deleting rights

The rights can be checked and modified through DELEGATION or FOLDER PERMISSIONS.

Example of higher rights through FOLDER PERMISSIONS

- Show the full tree trough the FOLDER LIST button
- Right click the required folder.
- Option PROPERTIES
- PERMISSIONS Tab.
- From the component to which you need to assign higher rights
- FOLDER Tab – PROPERTIES Group
- Button



## 2 Other possibilities for the Calendar

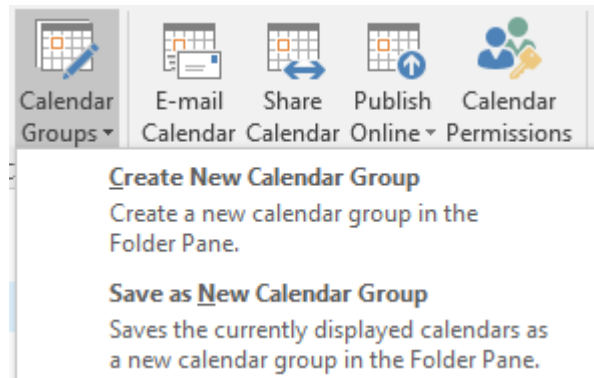
### 2.1 Calendar Groups

#### 2.1.1 Purpose

*Simple display tool* : calendar groups let you group calendars under a custom name.

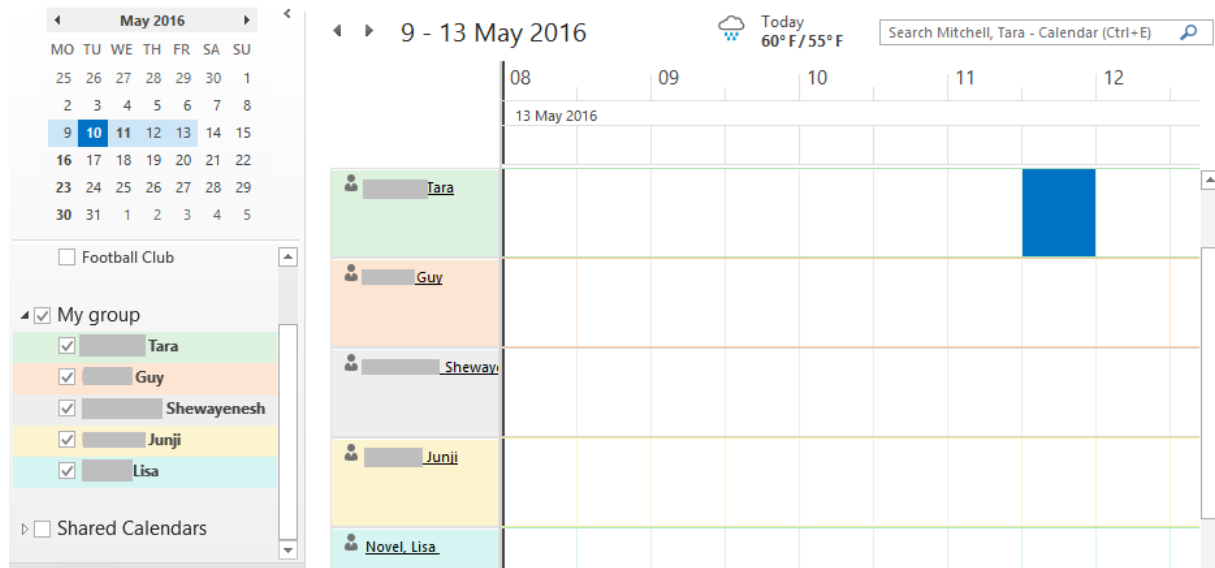
#### 2.1.2 Creating a calendar group

- HOME Tab – MANAGE CALENDARS Group



A dialog box will ask you to name the group, then another one will let you select the group members.

Calendars are listed in rows to make it easier to read :



*\* The calendars in the above screen capture were accessible but before an important migration from Lotus to Outlook, consequently there are empty ...*

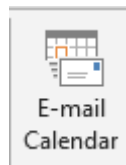
- ✎ If the user has not granted you any right, the time slots are simply displayed in blue, violet.  
Caution : if you double-click, Outlook comes up with a meeting request for the user in question (a right click will tell you than setting up a meeting is the only available command).
- ✎ If you have been granted rights, a tooltip will show the details for the given appointment or event ... you will be able to manage the calendar items according to your rights.
- ✎ If you point a user : his/her contact card is displayed

## 2.2 Sending a calendar via e-mail

**This is not really *sharing*. It is only a "copy" that you send.**

### 2.2.1 Sending

HOME Tab – SHARE Group – Button




By default : your main calendar

Right click a calendar (main or any custom one)

SHARE - SEND A CALENDAR VIA E-MAIL


- A new message is automatically created. Here below the possibilities :

Send a Calendar via E-mail ✕

 Specify the calendar information you want to include.

Calendar:

Date Range:   
lun. 25.04.2016

Detail: 

**Availability only**  
 Time will be shown as "Free," "Busy," "Tentative," "Working Elsewhere," or "Out of Office"

Show time within my working hours only [Set working hours](#)

Advanced: Hide <<

Include details of items marked private

Include attachments within calendar items

E-mail Layout:

**Calendar** : if you have created one or more personal calendars they will be listed here.

**Date Range** : your Calendar extract may include *Today – Tomorrow – Next 7 days etc ...*

**Detail** : you can choose from *Availability only (free/busy/out of office)*, *Limited details (free/busy + object)* or *Full details (full info)*

**Advanced** : according to your *Detail* choice, the Advanced options is available or not.

The calendar is displayed : ❶ in the body text (in a graphic form nice to consult) and ❷ as an xxx.ics attached file (international format that can be read by a lot of mailers).

**Training, User2 Calendar**  
user2@o365.ch  
10 May 2016 – 08 June 2016  
Time zone: (UTC+01:00) Amsterdam, Berlin, Bern, Rome, Stockholm, Vienna  
(Adjusted for Daylight Saving Time)

May 2016							June 2016						
Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su
						1			1	2	3	4	5
2	3	4	5	6	7	8	6	7	8	9	10	11	12
9	10	11	12	13	14	15	13	14	15	16	17	18	19
16	17	18	19	20	21	22	20	21	22	23	24	25	26
23	24	25	26	27	28	29	27	28	29	30			
30	31												

**Legend:**  
■ Busy      ▨ Tentative      □ Free  
■ Out of Office      ▩ Working Elsewhere      □ Outside of Working Hours

**May 2016**

▲ 10 May

□	Before 08:00	Free
□	08:00 – 12:00	Free
■	12:00 – 14:30	Lunch with Naomi
□	14:30 – 17:00	Free

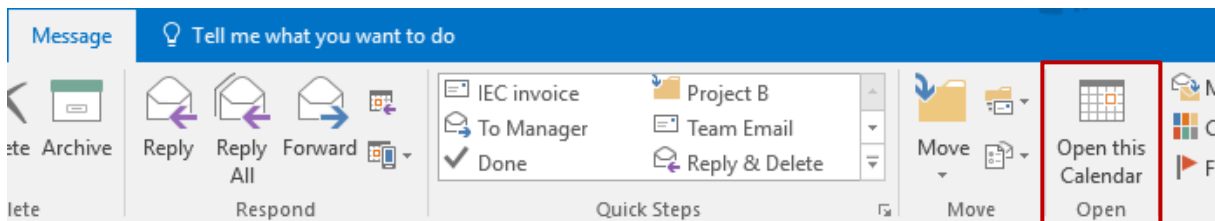
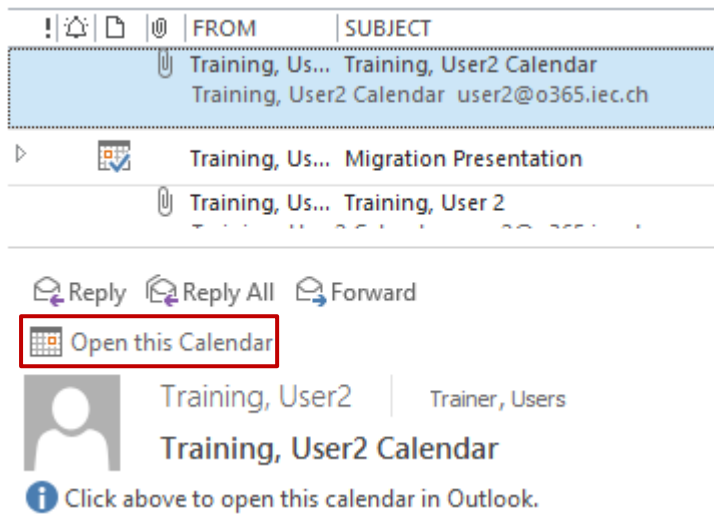
• Now simply finalize the message : recipient, body text, ....

✎ You cannot send a shared calendar even though you may have the maximum rights over it.

### 2.2.2 On the recipient side

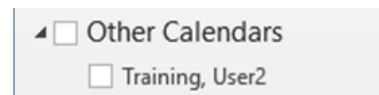
The recipient can leave it as such. Or integrate it into his/her calendar.  
Outlook 2013 = double-click on the xxx.ics attached file

2016 = directly from the Reading Pane or by clicking on the OPEN THIS CALENDAR button once the message has been opened :



A security warning message will prompt you to confirm that you want to open this calendar. Answer YES.

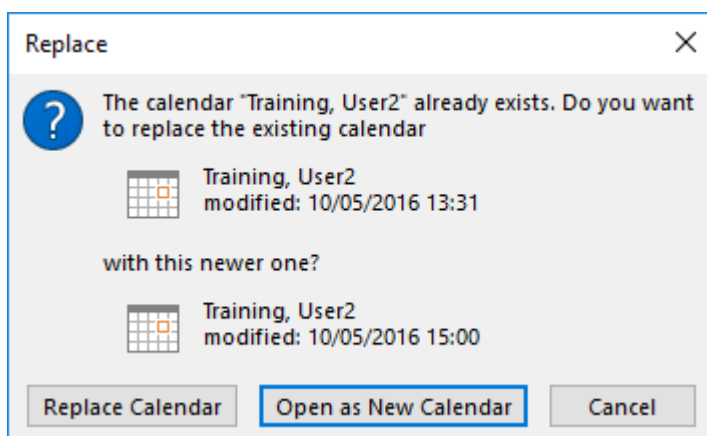
The calendar is displayed in the list of calendars



### 2.2.3 Updating

Nothing will be automatic !

The source sender will re-send the calendar via email. The recipient will try to open the calendar again. Outlook will detect that the calendar is already displayed in the list of calendars and will prompt you to overwrite it with the new version :



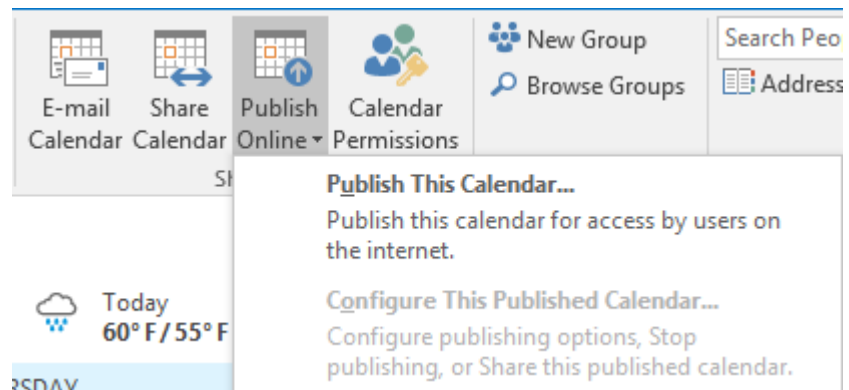
## 2.3 Publish online

When your contact does not belong to your Exchange server, it can be interesting to publish your calendar online. *Its update is automatic* and your contact can read it (according to the kind of assigned rights). More interesting than « sending the calendar via email » ... Provided of course that an external publishing is no issue to your company...

The possibilities will depend on your environment. What follows corresponds to my configuration (standalone subscription to Office 365 small enterprise – Office.com).

### HOME Tab – SHARE Group

(once published, the first option turns greyed out and only the second option is available)



Direct access to Office 365. But I must first go through the usual identification steps.



Connectez-vous avec votre compte

Maintenir la connexion

### Publier le calendrier

Vous pouvez publier un calendrier. Utilisez un lien HTML si vous souhaitez que les destinataires puissent consulter le calendrier ou un lien ICS si vous souhaitez qu'ils s'inscrivent.

Sélectionner un calendrier

Sélectionner les autorisations

HTML <http://amsprd0702.outlook.com/owa/calendar/b9da310708ff4e5cb966d2fdc08aea33@jaelofficedoc.c>

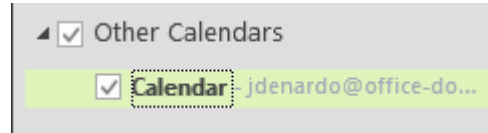
ICS <http://amsprd0702.outlook.com/owa/calendar/b9da310708ff4e5cb966d2fdc08aea33@jaelofficedoc.c>

Copy-paste the link into an Outlook message ...

To mention : even though I set in the access rights that my contact can see only my availability, the link generates a view showing all details ...

If the recipient wants to embed my calendar into his mailbox, he / she simply needs to follow the link to the .ics file and instructions will be displayed.

The calendar will be listed in his tree of calendars



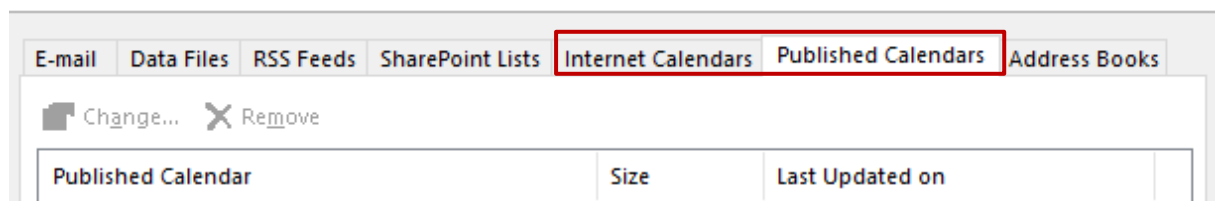
### **Manage – update and delete**

*Update is done* when you run Outlook (in the background)

*To delete* :

For the recipient : right click and select the DELETE CALENDAR option.

In all cases - *recipient or owner* - manage the publishing through FILE – INFO – ACCOUNT SETTINGS Button – ACCOUNT SETTINGS Option :



**Internet Calendars**

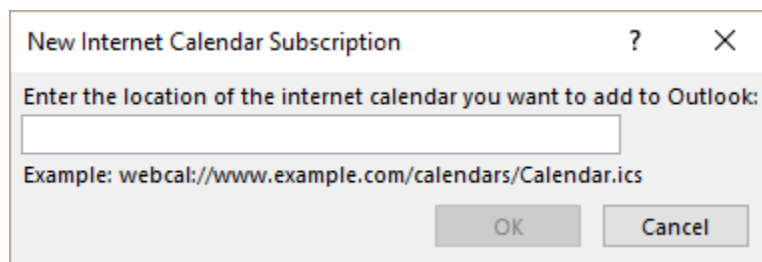
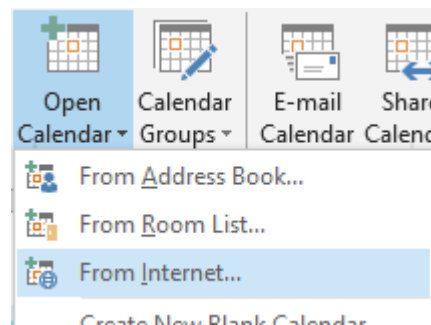
Calendars you have received and subscribed to

**Published Calendars**

Calendars that **you** have published

### ***Other possibility to open a calendar***

HOME Tab - MANAGE CALENDARS Group



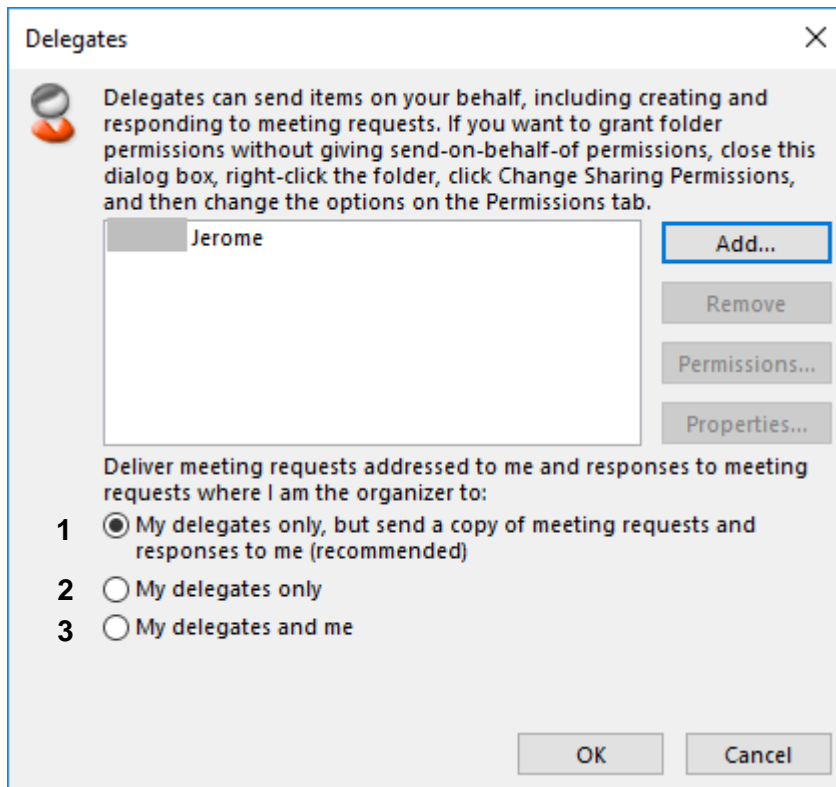
Paste the link you have received in the message

\* The other options of the drop-down list are related to Exchange

## 3 Delegation

### 3.1 Granting rights

- FILE – INFO – ACCOUNT SETTINGS – DELEGATE ACCESS



#### 3.1.1 Managing meeting requests and their answers

The options are not very clear and some work the same according to the situation. An example with real names will make it easier to explain :

**Owner : Jean**

**Assistant : Magali**

**Colleague : Paul**

#### **Paul invites Jean**

❶ and ❷

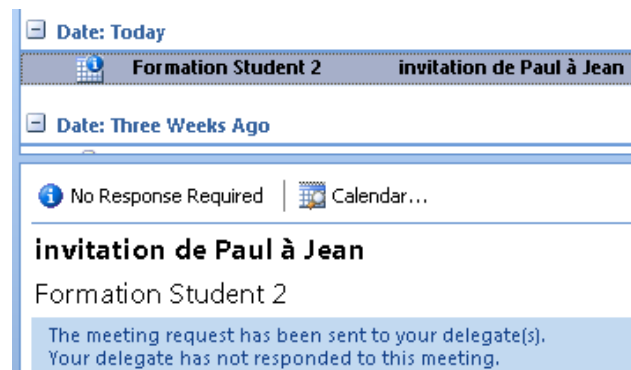
Jean

The meeting is placed in his calendar, waiting for Magali to accept it.



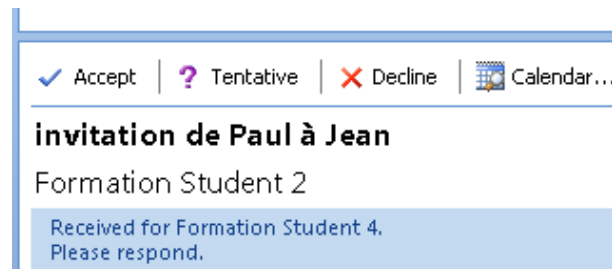


He only receives an information message in his Inbox



Magali

She receives the meeting request and must reply to it



She accepts : the meeting is validated in Jean's calendar

She rejects : the meeting is removed from Jean's calendar

③

The meeting request is sent both to Jean and Magali

It is always the last answer that counts

But caution :

Magali accepts

the meeting is validated in Jean's calendar

Jean declines

the meeting is removed

Magali accepts again

nothing happens ... the meeting is not placed back ...

### Jean invites Paul

① and ③

For Paul and Jean : the process is normal

The link is direct and Magali receives no meeting request

Paul accepts

*Magali* receives the answer

*Jean* also receives the answer

②

For Paul and Jean : the process is normal

The link is direct and Magali receives no meeting request

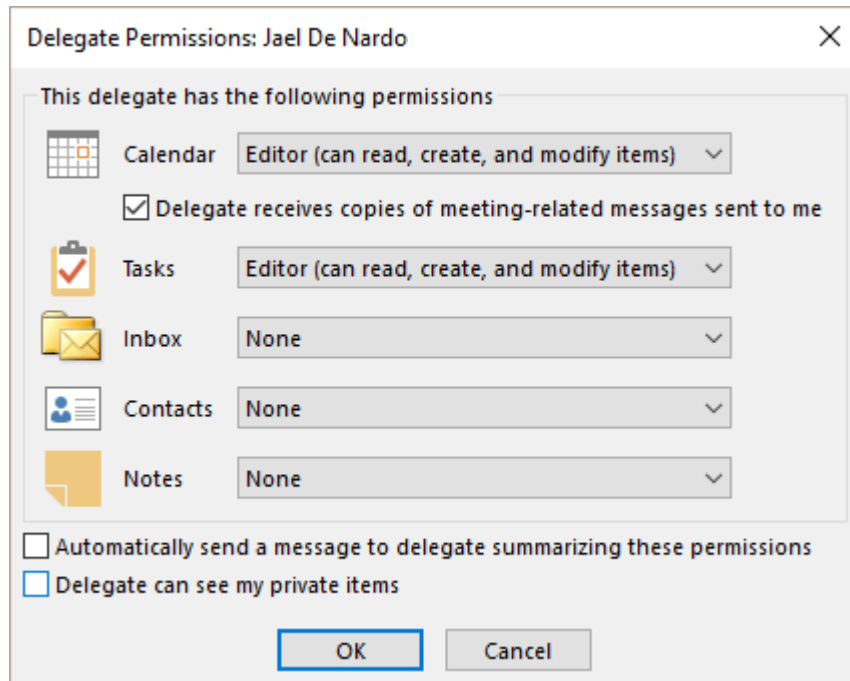
Paul accepts :

*Magali* receives the answer

*Jean* does not receive the answer (the meeting is directly accepted in this calendar)

### 3.1.2 Granting rights

- Click on the ADD button to add a user. It will display the usual recipients dialog box



Please note that you cannot grant rights to « custom folders » whether first or second level folders and that default Outlook folders such as SENT ITEMS ... are missing.

*Delegate receives copies of meeting-related messages sent to me*

**This option is active by default.**

It validates the choice made in the previous dialog box regarding meeting requests.

**Turning this option off automatically turns off the previous three options. This means that the delegate does not deal at all with the owner's meeting requests.**

*Automatically send a message ....*

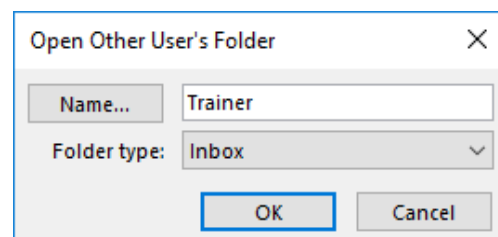
The system automatically sends the delegate a message explaining what delegation means and summarizing his/her rights on your folders

*Delegate can see my private items*

Would give the delegate the right to see and manage *private* items such as an appointment, a contact ...

## 3.2 Opening another user's folder

FILE – OPEN – OTHER USER'S FOLDER



### **Choose non only the user but also the required « component » or folder**

Please note that you can only access one component at a time

Please note also that you cannot open a custom folder (directly below MAILBOX or a second level folder in Contacts ...)

#### *Folder other than Inbox*

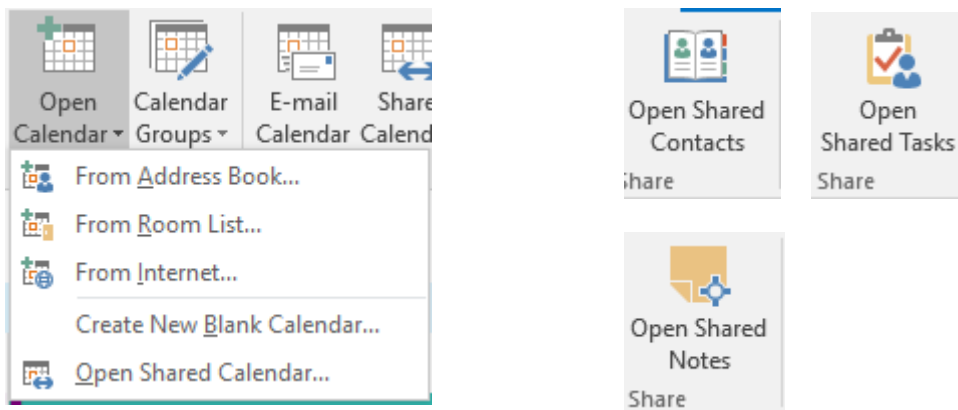
The shared folder that you open will be displayed in the right part of the Outlook window. The Navigation Pane shows the shared folder after you own tree. See the screen captures at the beginning of this section.

#### *Inbox*

Caution : when you open the Inbox folder of another user, it will be slightly different. The right part of the Outlook window will display the user Inbox but the left part (Navigation Pane) still shows *your tree*. A simple click onto one of your folders and you automatically quit the sharing.

### **Other methods to open a shared folder other than the Inbox folder**

All components – except Inbox – provide a command to open a shared component :



### **3.3 Tracking who creates or modifies**

#### Folders such as Calendar, Contacts .... that is other than Inbox

When you create or modify an item such as an appointment, a contact in the owner's folder, Outlook will indicate the author of the modification. For instance, at the bottom of the contact window, Outlook will mention *Last modified by X at 14 :06*, and this even if you have been granted *Owner* rights (for a task or a note : no tracking info).

#### Inbox

The Inbox folder behaves differently. When you create a new message (whether really new or simply replying), Outlook does not detect that you do so from someone else's folder. So YOU send under *your name and the responsibility of the owner is not affected*.

If you have been granted a higher right than read-only, it is necessary to show the FROM button and specify the owner's name. In this case, the recipient will know that you are sending the message on behalf of the owner :

(real names have been hidden in the screen captures)

\* In the case of a reply, things are easier as the FROM box + the owner's name are automatically displayed.

**From:** formateur **On Behalf Of** Ramon .....  
**Sent:** vendredi, 4. avril 2008 10:24  
**To:** Nicolas I .....  
**Subject:** RE:

oui il est parti !!  
c'est mireille qui répond

**Mireille Oss-Buck**  
Formatrice

**From:** Nicolas I .....  
**Sent:** vendredi, 4. avril 2008 10:23  
**To:** Ramon ! .....  
**Subject:**

Hello Ramon il parait que tu es loin 2 semaines!

### Sent Items

By default : the copy of the sent message is systematically placed in YOUR Sent Items folder and not into the owner's folder. *Microsoft suggests the following solution : display the owner mailbox into your own tree and move the sent messages from your folder to the owner folder.*

### Deleted Items

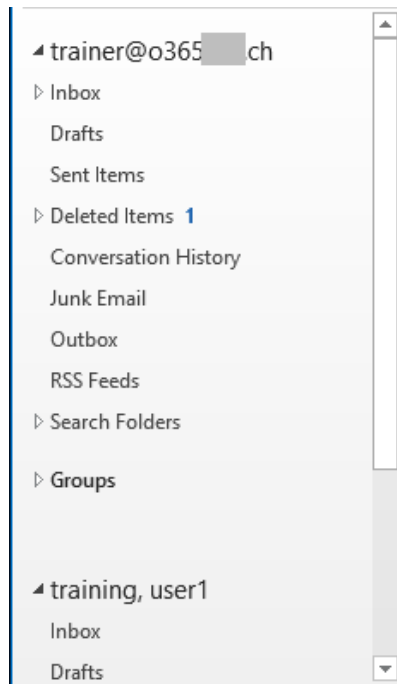
By default : the deleted item is systematically placed into YOUR Deleted Items folder and not into the owner's folder. *Microsoft suggests the following solution : you may change the corresponding key in the Registry ...*

## 4 Adding another user's MAILBOX to your profile

Delegating has the following weakness : you can open only one component or folder at a time and you cannot share and open custom folders.

Including the user's mailbox directly inside your own tree – fully or partially - will mean a more dynamic sharing.

Here below such a mailbox (test1)



### 4.1 How to display the other user mailbox

#### Sharing is set by the Exchange administrator

The administrator grants an access right. Three possibilities are available : *Full access – Send as – Send on behalf of*. Then the only thing you will have to do is bring the user mailbox into your tree.

#### Sharing is done by the two users

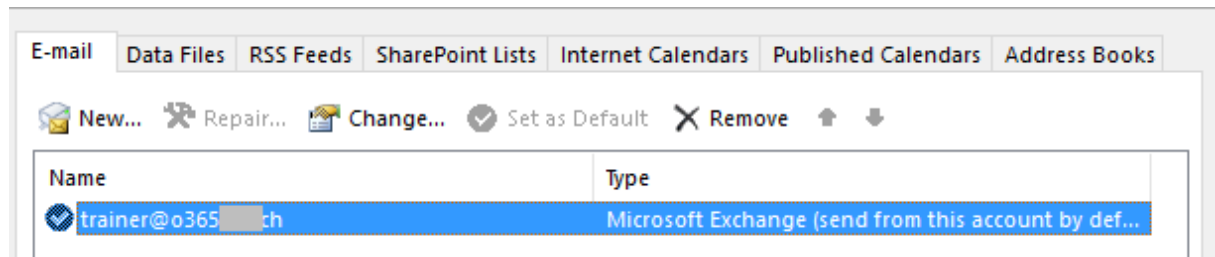
This will be longer and mean more hassle

**The mailbox owner must grant you access rights ON ALL THE REQUIRED.** *Sub-folders already created will need to be shared one by one, granting access rights on the parent folder only is unfortunately not sufficient (after sharing, a newly created sub-folder will inherit the right access)*

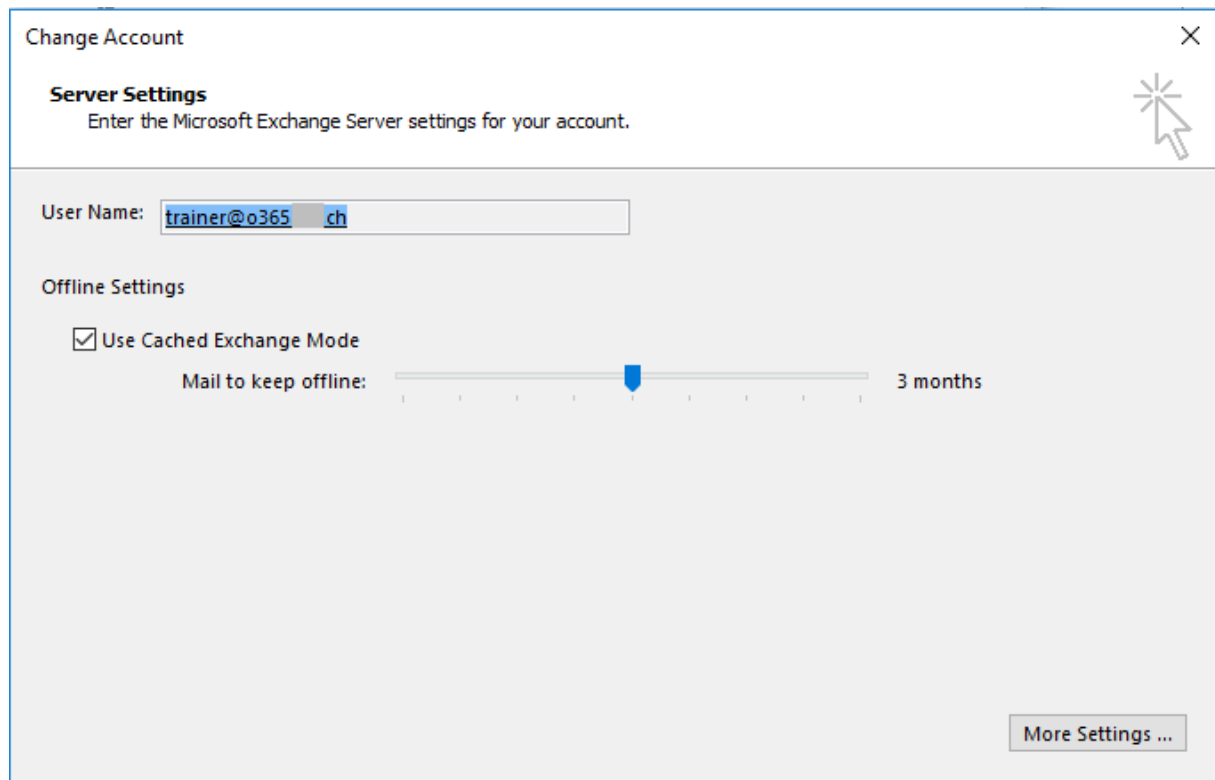
Then you will have to make the link from your mailbox to the user mailbox in question, in order to “bring” it into your folder tree.

#### 4.1.1 Creating the link to the required user mailbox

FILE – INFO – ACCOUNT SETTINGS – ACCOUNT SETTINGS

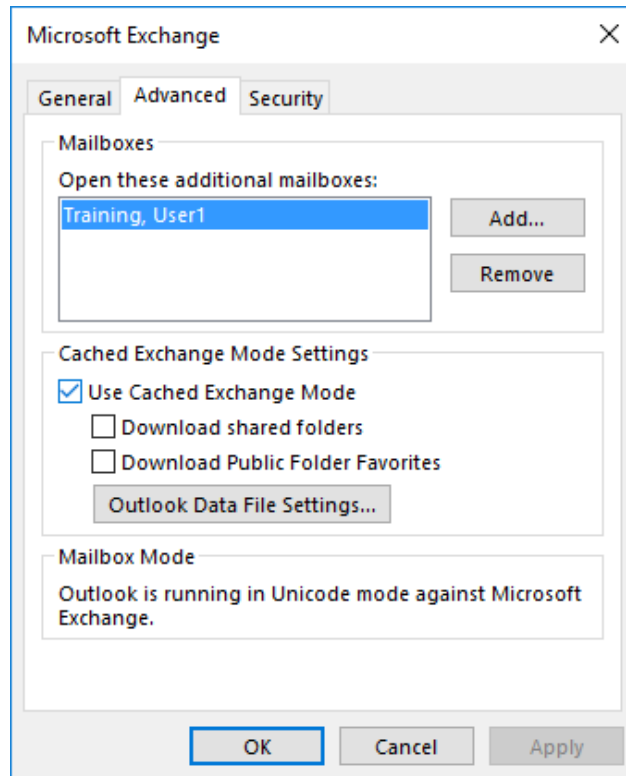


Click on the CHANGE button



Click on the MORE SETTINGS button

Click on the ADD button and then indicate the required user ...



**Same but faster :**

Right click at the « root » of the MAILBOX ... row  
Option PROPERTIES FOR MAILBOX ....  
ADVANCED button  
ADVANCED button : same dialog box as above

**Reminder : if the owner has not granted you access rights, the MAILBOX will be listed but you will be unable to expand its folders.**

#### 4.1.2 Sharing the folders

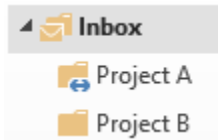
- Ideal : show the full tree trough FOLDERS



- Right click the **mailbox parent folder** (usually your name) and PROPERTIES.
- PERMISSIONS Tab.
- Set the general rights on your mailbox  
Reminder : it is the owner of the mailbox that sets the rights ....  
*A minimum of Read-Only right and make sure the option FOLDER VISIBLE is turned on.*

**Then do the same for EACH FOLDER to share (default Outlook folders and custom folders/sub-folders).** You can skip any folder that you do not want to share.

**Delegation rights :** folders with rights set through delegation will be automatically listed in the folder tree, but be patient, this can take a few minutes ...



The "hand" icon means that a person that is not the mailbox owner has an access right over the folder.  
No global command for all subfolders of a given folder. You will have to do this ONE BY ONE .... But when you create a new folder, it will automatically retrieve the sharing rights of the *parent* folder.

Tracking : same rules as for delegation.

## 4.2 Summary : differences between sharing and delegating

*Managing the calendar*      *Delegating and sharing are equivalent*

*Meeting requests*              *Only delegating will let you decide this should work*

*Other folder*                      *Delegating and sharing are similar. But :*  
*Delegating only affect the main folders*  
*Sharing can be set for any folder (other than a main one and also a subfolder). But to access it, the owner mailbox must be added to the "delegate" profile.*

*Sending mails*                      *Delegating will let you do it On behalf of*  
*A sharing done directly from Exchange with a minimum of Send As rights or manual with a high right will let you send a mail as if you were the mailbox owner*

## 4.3 Defining rights trough sharing AND delegating

Any right granted via delegation or sharing will be displayed in the given folder permissions.

# 5 Using Public Folders

## 5.1 Aim and contents

**The item can be read by anyone but the item is not sent to everyone.**

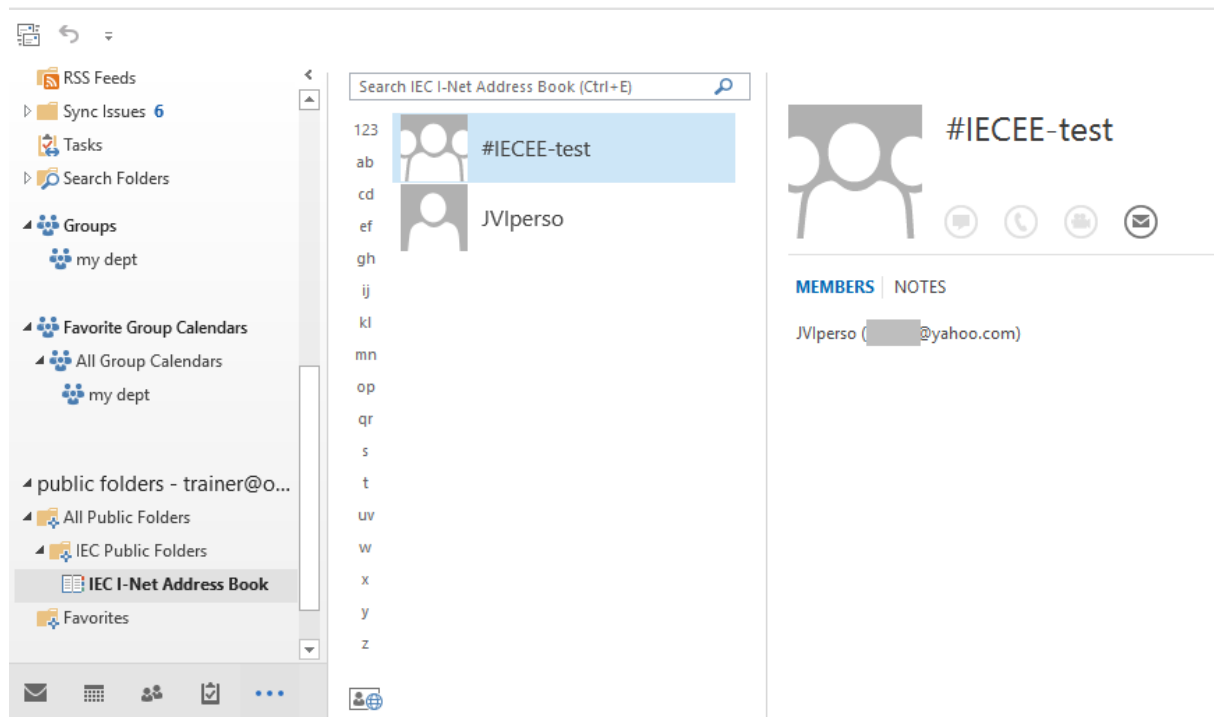
The Public Folders are listed at the bottom of the FOLDER LIST.

They are created by the administrator but can be used by any network user. Caution : the sub-folder you may create can only contain one type of items (this is set when creating the sub-folder) : for example messages or contacts etc...Therefore choose carefully the folder name. Moreover only the user having created the sub-folder is entitled to rename or delete it.



Simply place an item in the corresponding folder and any network user will be able to read it.

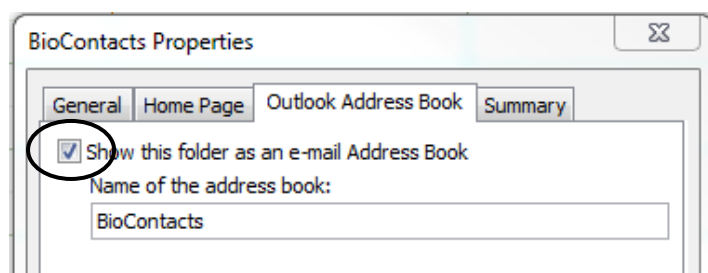
*Example : a company can create a calendar for their conference room and users can check and block the necessary time slots or can create a folder for special company contacts ...*



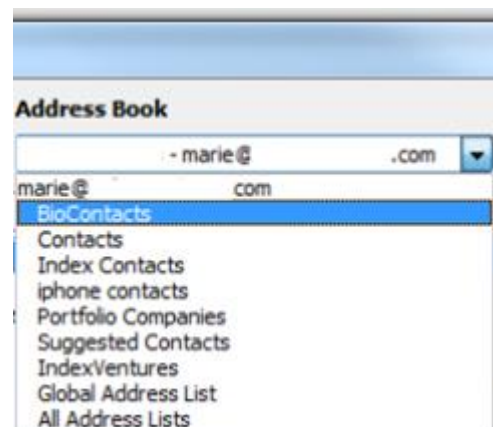
## 5.2 How to retrieve the contacts from a public folder as a message recipients

You simply need to declare the given folder as an *Outlook Address Book*

- Right click the given Public Folder
- Option PROPERTIES
- OUTLOOK ADDRESS BOOK Tab



When you create a message and choose the recipient, the folder will be available in the usual drop-down list :

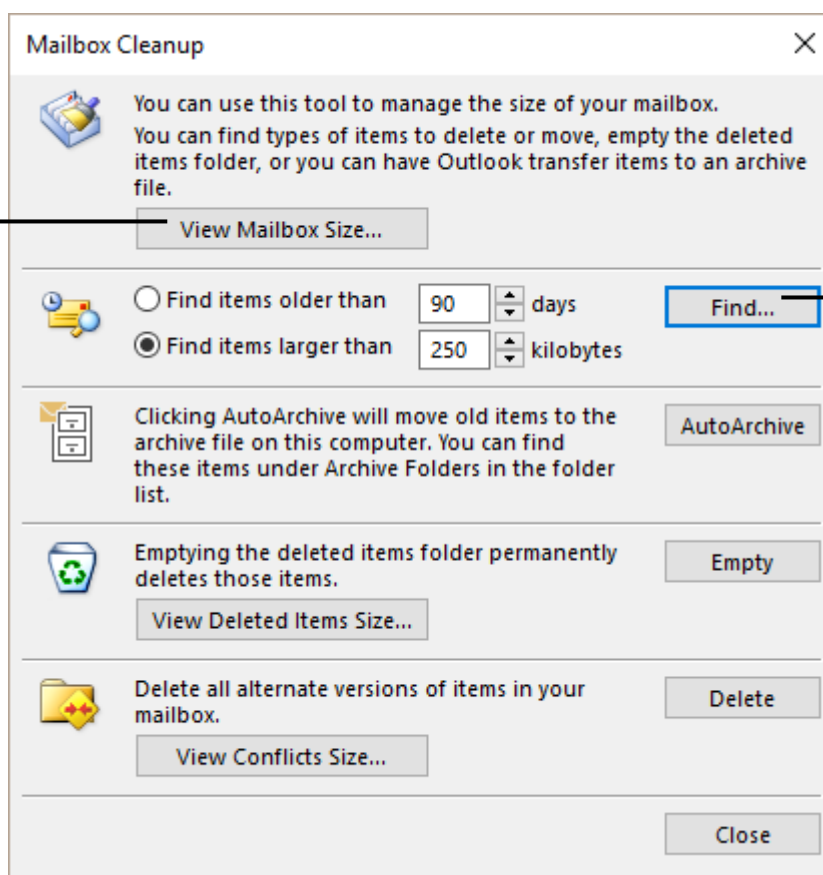


# ARCHIVING (can vary according to your company's policy)

## 1 Do not underestimate manual cleanup

Make sure not to limit cleanup to the Inbox folder but make sure you regularly delete old items from folders such as Sent Items, Deleted Items ....

To help you, an interesting option : FILE – CLEANUP TOOLS – MAILBOX CLEANUP



To check the real size of each folder. You may determine which folder seems too heavy (the Inbox folder or the Sent Items folder ....?).

To search manually the oldest items or items particularly heavy. The search panel will look for all items matching the set conditions (*caution : this search even includes contacts !*) and you can directly delete them.

Search, delete ... but do not forget to empty the Deleted Items folder.

## 2 Automatic archiving

Outlook includes an autoarchiving feature (run every 14 days if it is turned on). After a set time where the item has not been modified (for instance 6 months for a message), the item is considered as old and will be automatically moved to an archive file – *stored onto your hard disk*. **Outlook 2016 adds an ARCHIVE button (HOME Tab – DELETE Group) but it has nothing to do with the present feature.**

It is important to mention that most companies do not use this autoarchiving tool and often turn off the whole feature directly when installing Outlook.

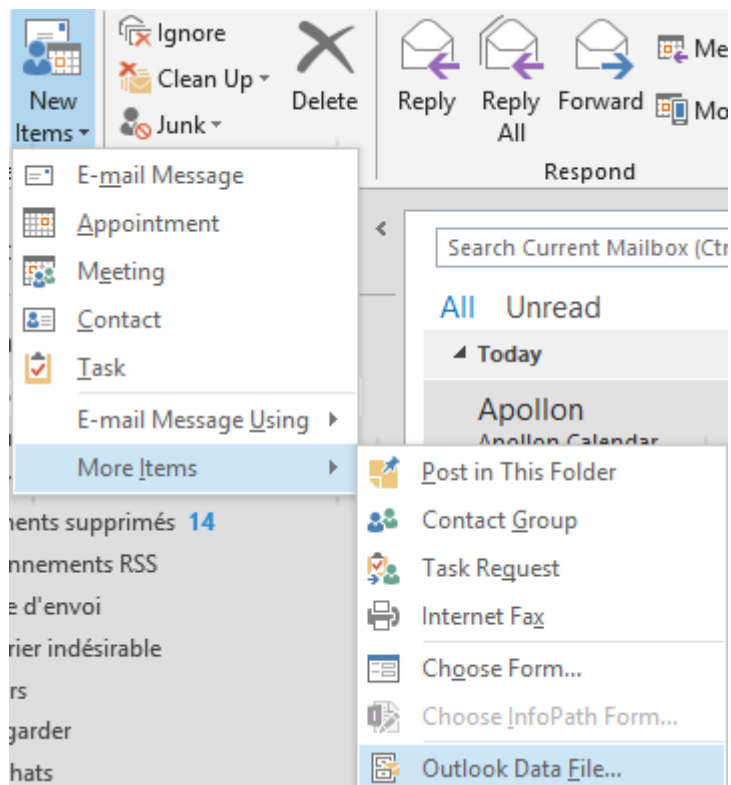
To check this autoarchive function – and turn it off if necessary : FILE – OPTIONS – ADVANCED Category – AUTOARCHIVE Zone – AUTOARCHIVE SETTINGS Button – RUN AUTOARCHIVE EVERY 14 DAYS Option. (if the AUTOARCHIVE zone is missing, it means the administrator has turned off the function)

## 3 Moving old or heavy items to a personal “archiving” .pst file.

This personal file is created outside your Outlook Mailbox and therefore, the “weight” of its contents does not interfere with that of your Mailbox. On the other hand you can display it into your standard Outlook tree and move any required item to this file. It is a common archiving policy chosen by companies. The file is usually created and installed directly by the IT dpt. If you need to do it yourself, here is how to proceed :

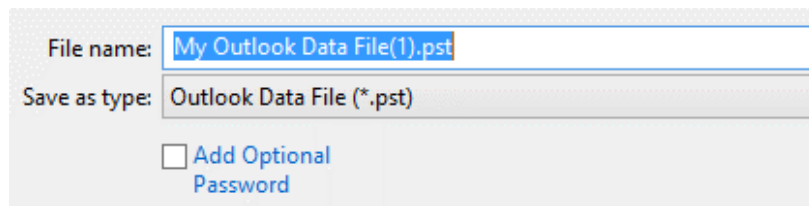
### 3.1 Creating the file

HOME Tab



A standard dialog box will be displayed :

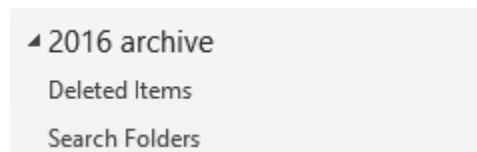
Default name



Default folder

► Utilisateurs ► Jael ► Documents ► Outlook Files

The Outlook tree automatically displays the file :



Subfolders and moving items : you can create as many subfolders as you need for your "filing". Then you simply select the items to be moved and you drag them onto the required subfolder. Just as you would do in the Explorer.

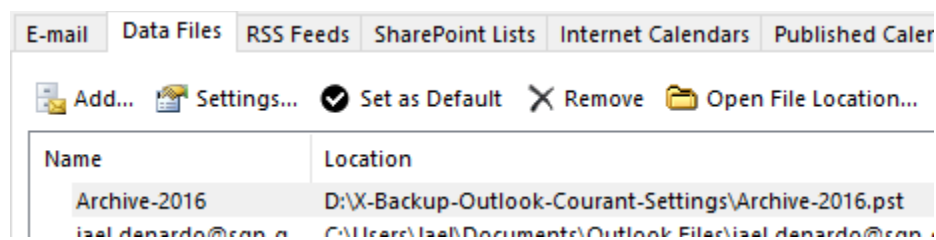
### 3.2 Closing or opening the file

*Close* : right click the file in the Folder List and option CLOSE "XXX"

*Open* : FILE – OPEN – OUTLOOK DATA FILE and choose the file in question

### 3.3 Managing the file

FILE – INFO – ACCOUNT SETTINGS



Use the button SETTINGS, REMOVE, OPEN FILE LOCATION ... to check or modify as required.

*To delete the file completely* : do so in the Windows Explorer but Outlook must be closed.

## 4 Archiving using a third-party or directly with Microsoft (in the cloud)

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### 4.1 Third-party

A fair number of companies provide an automated archiving. Usually the archiving leaves the message header in the source folder, preceded with an archive icon to distinguish it from the other active messages. Consequently, the message weight is practically null.

If the user needs to work with an archived message, it is usually quite simple. The message can be downloaded back into the user mailbox and you can reply, forward as necessary ....

### 4.2 Office 365

Some types of subscriptions include archiving in the cloud. The IT department can upload heavy loads of mails to archive. When Outlook is used for the first time, a set portion of these mails is downloaded back into the user mailbox. By default, it is set on 12 months but it can be less. The access will be a sort of « virtual » archive file displayed in the tree.

While users are working with their mailboxes, there will be always the latest 3-6-12 months of mail displayed in the mailbox tree (archiving is automatic and older messages are uploaded in the cloud).

*Advantage* : no archive file stored physically on a given drive, accessibility whenever and wherever ...