THE UNIVERSITY OF QUEENSLAND
AUSTRALIA

Outlook 2016 Workshop

Course objectives:

- Manage correspondence and contacts efficiently
- Use the calendar effectively for appointments, meetings and events
- Customise Outlook settings

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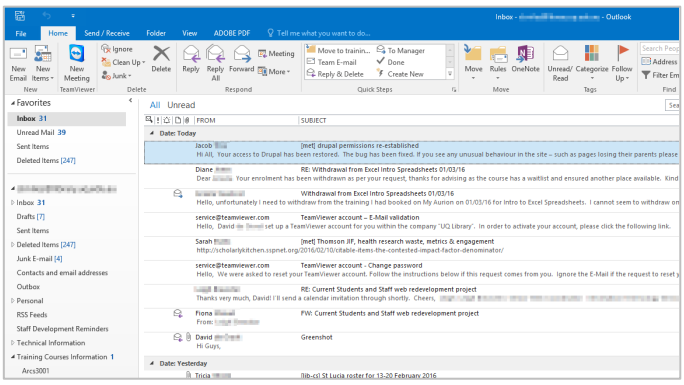
Interface Overview

The Outlook Ribbon and Quick Access Toolbar are contextual to the section of the program in use, e.g.: the **Mail** or **Calendar** section. The **File** tab provides access to '**Backstage View**' including account settings and application options. Backstage view will vary between sections and items.

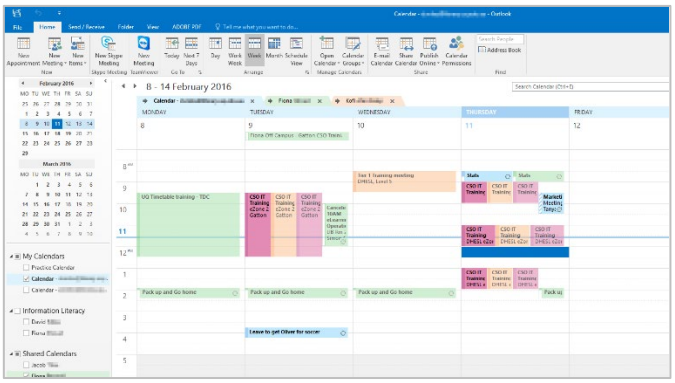
Mail

Microsoft Outlook 2016 organizes your emails, calendars, contacts, tasks, and to-do lists, all in one place. It all starts with your email account. From there you can start working with emails, turning them into tasks or appointments, and storing the people you interact with in your contacts, so you never have to remember an email address or phone number.



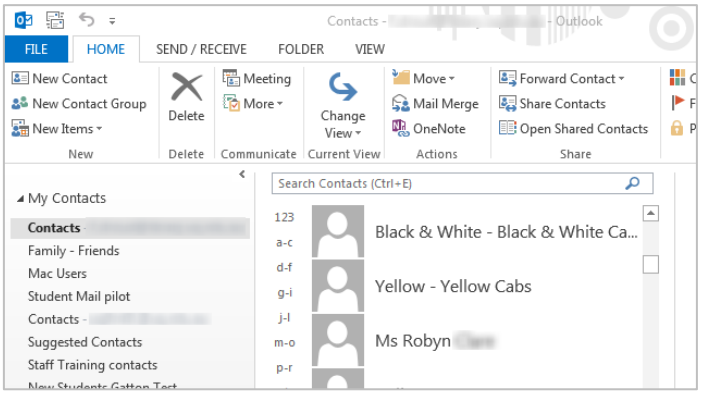
Calendar

Outlook 2016 includes powerful scheduling features in Calendar view. From here, you can create appointments and manage your time. You can schedule appointments and create multiple calendars, organize your schedule, and apply categories, reminders, and more. You are also able to share your calendar with others and are able to view and group other calendars.



People

This feature was previous referred to as Contacts. People view is the central place for all your contacts in Outlook 2016. Maintaining a detailed contacts list will make sending emails and scheduling meetings that much easier. You can add, manage, and organise your contacts and also import from another source.



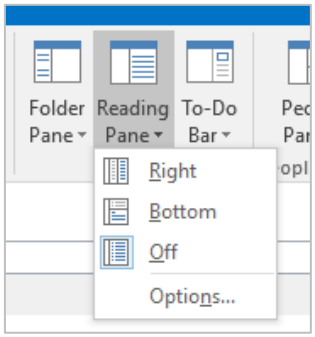
Notes

Exercise 1. ***Customise Mail layout***

Each section of Outlook has a customisable content pane. This enables you to personalise your screen in each section. This is a local setting you will have to configure on your workstations.

In the mail section

1. Go to the **View** tab
2. Click on the **Reading pane** button
3. Select **Off**



Using your mouse manually adjust the width of the:

- Navigation pane
- Reading pane
- To-Do Bar

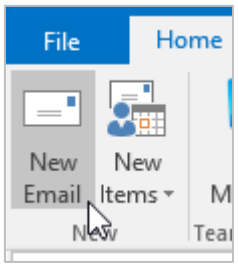
Email

Electronic mail is a timely and useful communication medium. With such immediacy and convenience, it is easy to use email tools ineffectively. Ensure that your work processes evolve alongside your technical skills.

Exercise 2. ***Create and automate email signatures***

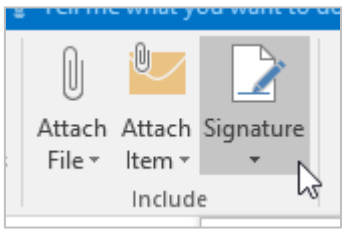
Email signature

1. Click **New Email**

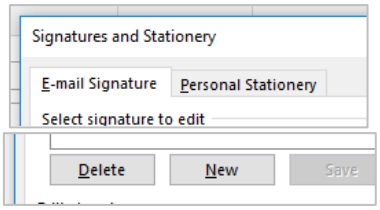


In the new message:

2. Go to the **message** tab
3. Click **Signatures** > **Signatures…**

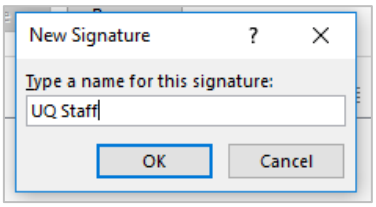


4. Click **New**



Notes

5. Enter '**UQ Staff**'
6. Click **OK**

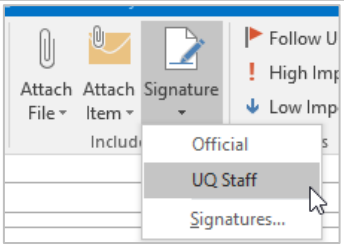


In the Edit signature box:

7. Enter signature details
8. Click **OK**

In the blank email:

9. Click **Signature** button
10. Select the new **UQ Staff** signature

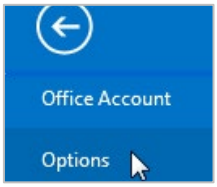


This signature will be added into the body of the email and replace any existing signature.

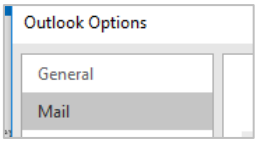
Default Signature for new emails

In Mail section:

1. Click on **File** tab
2. Click on **Options**

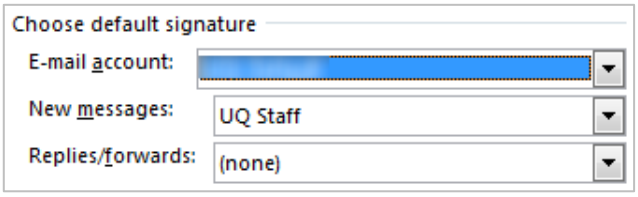


3. Click on the **Mail** option



4. Click on the **Signatures…** button

5. Select **New messages:** drop down arrow
6. Click on the **UQ Staff** signature
7. Click on **OK**



All new messages will automatically have the signature applied.

Notes

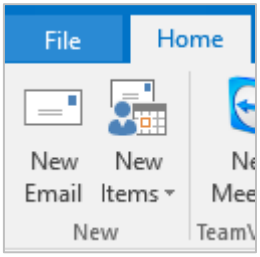
Exercise 3. ***Create an email template***

An email template creates identical copies of itself. Outlook templates are stored locally – so you may need to transfer or share them at intervals. To update an email template you will need to open a copy and Save As the changes to replace the existing template.

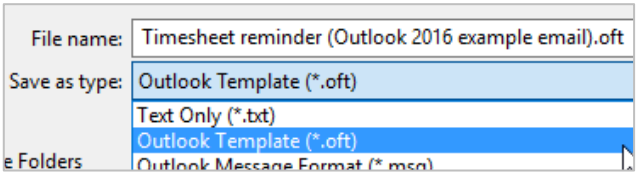
Creating an email template

1. Start a new email: Home tab – New Email
2. Enter any recipient details which will always be required
3. Enter a subject
4. Delete any signature text

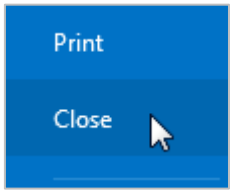
As each new email includes a signature your template would always have two signatures.



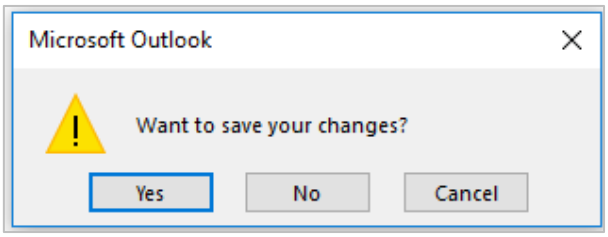
5. Enter some body text of your choice e.g. The quick brown fox
6. Click the **File** tab
7. Select **Save As**



8. In **Save as type**: choose **Outlook Template (*.oft)**
9. Click **Save**



10. Click on **File** tab
11. Select **Close**

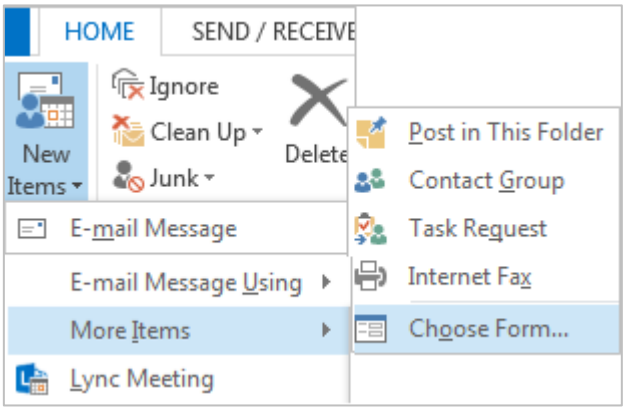


12. Click on **No**

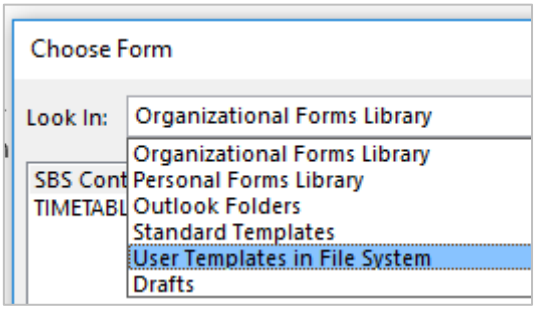
Notes

Using an email template

1. Click **New Items** > **More Items** > **Choose Form…**

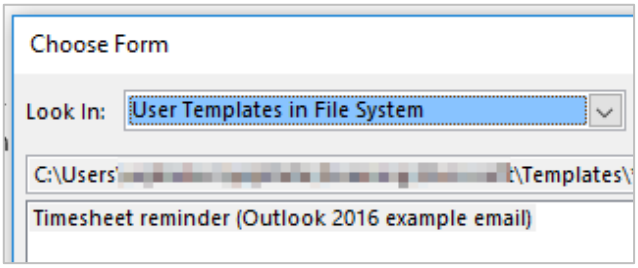


2. Choose **User Templates in File System** from the **Look In**: box



3. Select the template
4. Click **Open**

The file path will be visible if you need to transfer or share your templates.



Notes

Viewing and managing emails

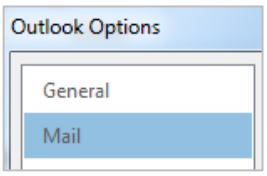
Composing, managing and filing emails can be a time consuming process. Consider changing the way you check and respond to your emails, for example:

- Limit checking your emails to two or three times a day and don't check emails first thing in the morning to avoid interrupting your plans for the day
- Deal with emails decisively and respond comprehensively so they don't generate more emails in response and try not to copy people into emails who don't need them.

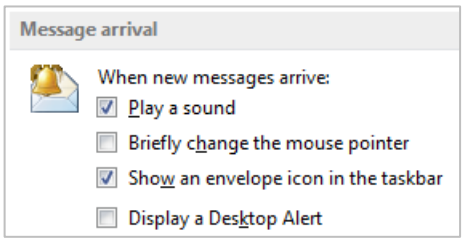
Exercise 4. ***Manage email settings***

Adjust email notifications

1. Click the **File** tab
2. Select **Options**
3. Click the **Mail** menu item in the **Options** dialogue box

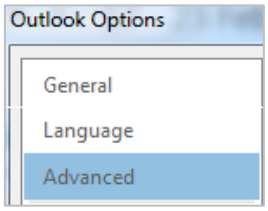


4. Uncheck the notification boxes as desired

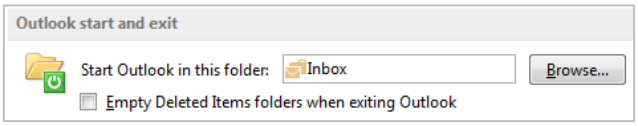


Adjust start and exit settings

1. Click the **File** tab
2. Select **Options**
3. Click the **Advanced** menu item in the Options dialogue box



4. Click the **Browse…** button
5. Select a new start folder
6. Click **OK**

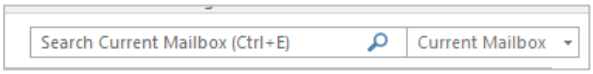


Notes

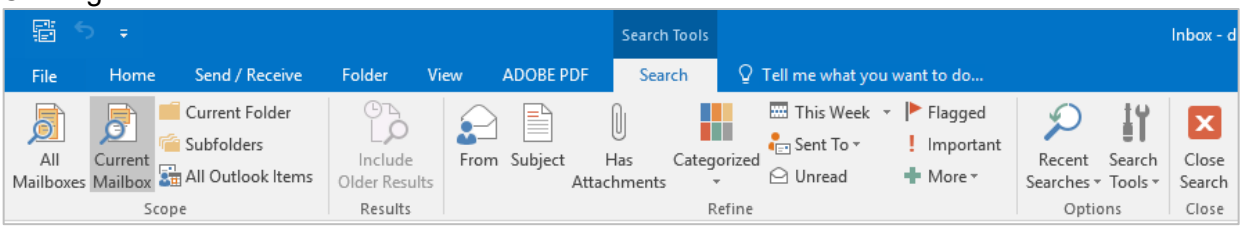
Exercise 5. ***Searching emails***

Locating emails in a crowded inbox is made simple using these search tips…

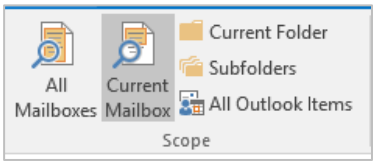
The search area is in the top right of the Outlook window



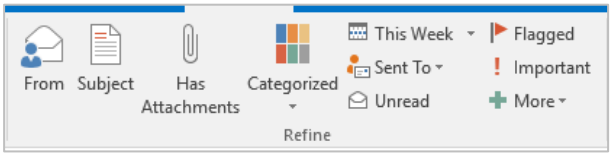
Clicking in the search area activates the Search toolbar



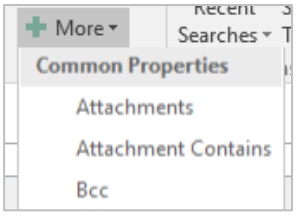
The **Scope** group controls the part of Outlook being searched

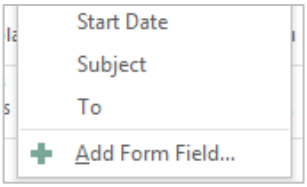


The **Refine** group controls what is being searched for



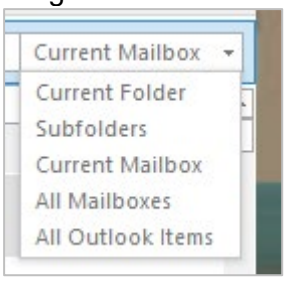
The **More** button in the Refine group allows you to search through many more email properties



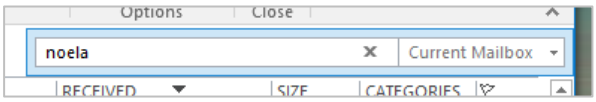


It is possible to search directly in the search area using the correct search parameters
Use the drop down list to search:

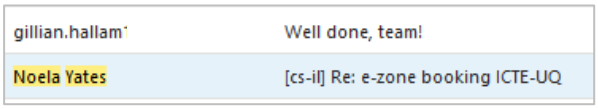
- Current Folder
- Subfolders (of the current folder)
- Current Mailbox
- All Mailboxes (if your Outlook is setup to view multiple accounts)
- All Outlook Items (to search Mail, Calendar, People and Tasks)



Click in the **Search area**
Enter a search term e.g. the name of your manager
This will locate items containing that name (Not case sensitive)



Enter their full name
Locates both names but not necessarily in that order
Results can be in address, subject or body



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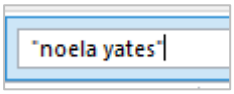
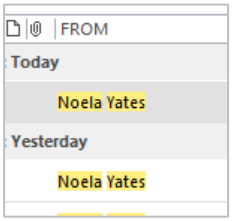
Enter their full name in quotation marks
Locates the exact phrase



Enter your managers name preceded by From:
e.g.From:Noela Yates
Locates emails sent by that person

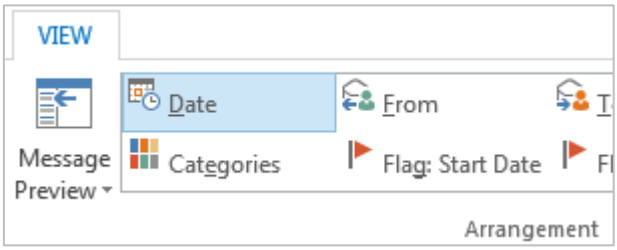


Exercise 6. ***Adjust email viewing options***

Use conversation view

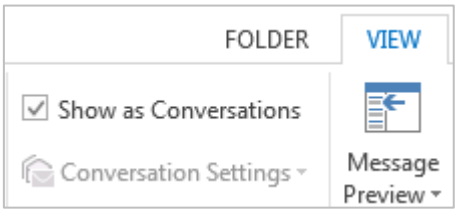
Conversation view aggregates emails and summarises them by subject. As you receive a new email with that subject the whole conversation moves to the top of your email list. This can include emails in other folders.

1. Click the **View** tab
2. Select **Date** in the **Arrangement** group

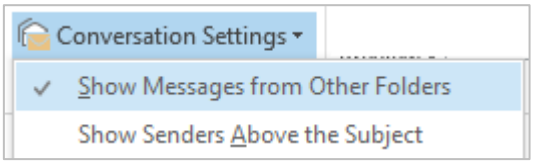


3. Check **Show as Conversations**
4. Select **This folder** button

You can easily return to regular Date View by deselecting Show As Conversation



5. Click **Conversation Settings**
6. Enable **Show Messages from Other Folders**

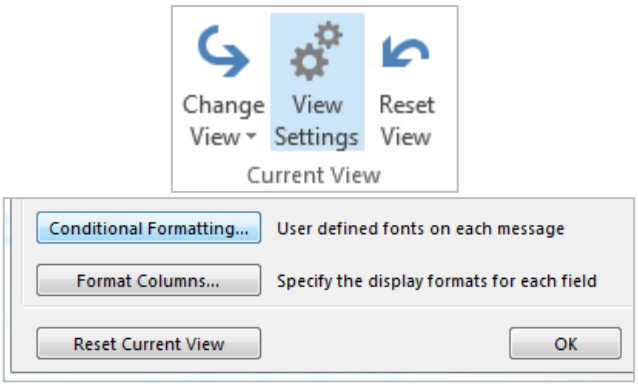


Notes

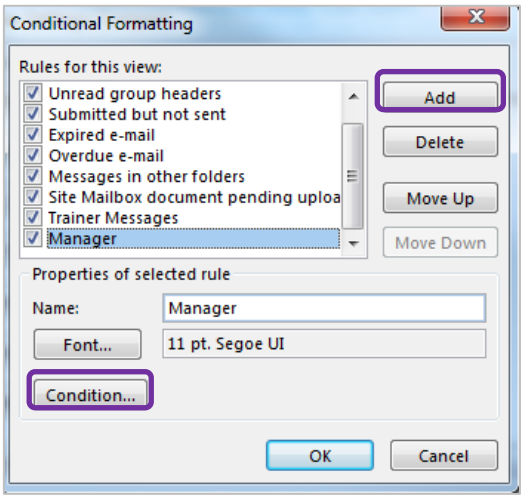
Colour code incoming emails

It is possible to use conditional formatting to colour code incoming correspondence.

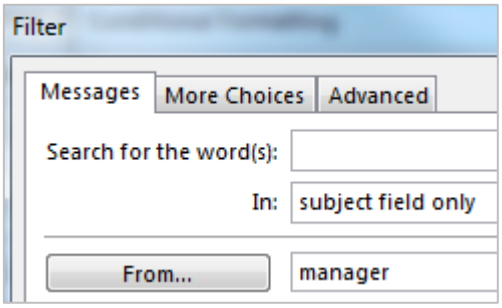
1. Click the **View** tab
2. Click **View Settings**
3. Click **Conditional Formatting**



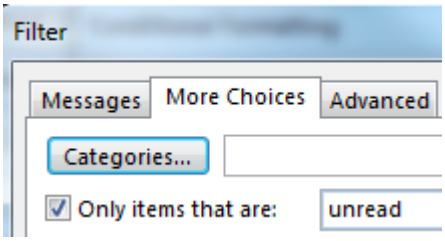
4. Click **Add**
5. Type **Manager** in the Name field
6. Click the **Condition** button



7. Click the **From…** button
8. Search and select your manager's name from the address book then click **OK**

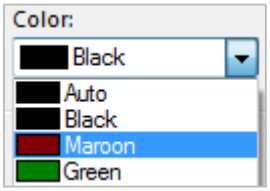


9. Click the **More Choices** tab
10. Check the **Only items that are**: checkbox
11. Set the list item to **unread**
12. Click **OK**



Notes

13. Click the **Font** button
14. Choose a font colour
15. Click **OK**
16. Click **OK** to confirm the new condition
17. Click **OK** to confirm the view change



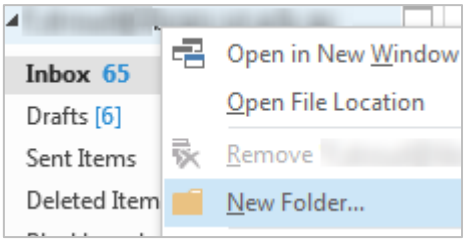
Until you receive a new email from your manager or mark an email as unread no emails will be highlighted according to this rule.

Exercise 7. ***Filing your emails***

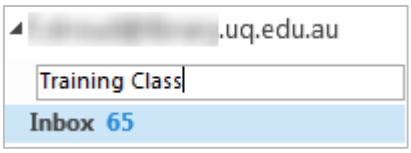
Filing with quick steps

Create new folder

1. Right click your **mailbox** in the Navigation Bar
2. Select **New Folder…**



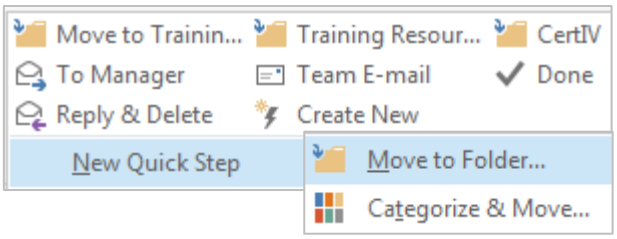
3. Type the name '**Training Class**'
4. Press **Enter** on keyboard



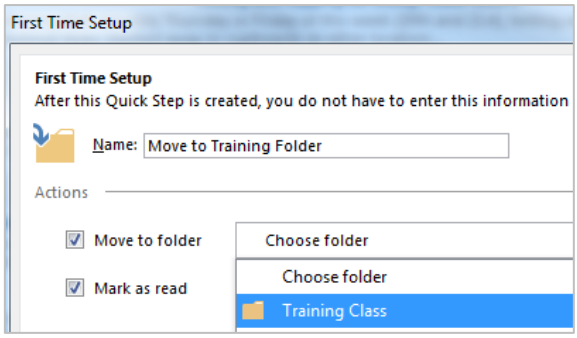
Folder will be placed in alphabetical order with current folders in mailbox

Quick step – move to folder

1. Click the **More** button in **Quick Steps** group
2. Select **New Quick Step** > **Move to Folder…** in the **Quick Steps** group on the **Home** tab



3. Enter the name '**Move to Training Folder**'
4. Select the **Training Class** folder
5. Click **Finish**



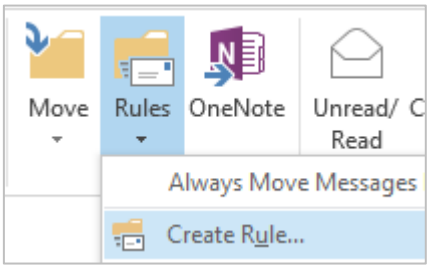
Notes

6. Select the **Timesheet Reminder** email
7. Click on the new quick step '**Move to Training folder**'

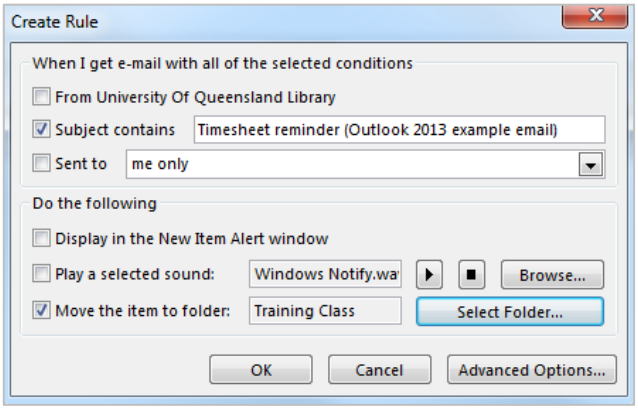
Filing with email rules

Rules can be setup to file or delete emails as they arrive, for example, when you receive: automated reminders from enterprise systems, emails about staff absences or irrelevant emails from mailing lists.

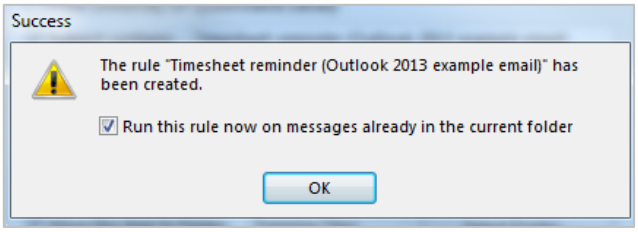
1. Go to **Training Class** folder
2. Select the **Timesheet reminder** email
3. Click **Rules** button in **Move** group
4. Select **Create Rule…**



5. Check **Subject contains…** button
6. Check **Move the item to folder**
7. Click **Select folder…** button
8. Select **Training Class** folder
9. Click on **OK** to confirm folder
10. Click **OK** to confirm rule settings



11. Check '**Run this rule now**'
12. Click **OK**

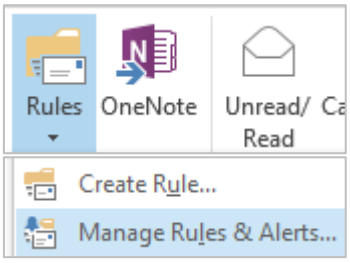


Check the Training class folder to ensure the messages moved are as intended

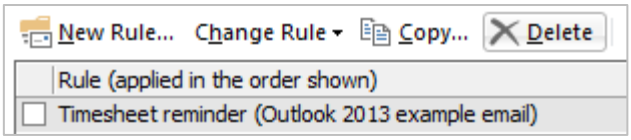
Notes

View, edit and delete rules

1. Click the **Rules** button > **Manage Rules & Alerts…**



- Clear tick alongside rule to switch it off
- Click on Delete button to remove rule



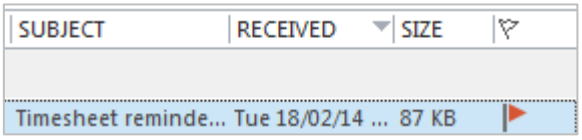
Exercise 8. *Applying flags and categories*

Email flags

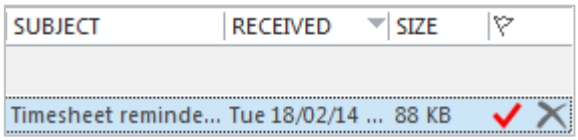
Use flags as a follow up reminder

- Left click the **Flag** icon on any email

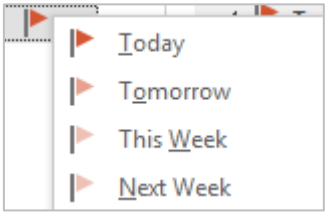
Flagged emails are automatically listed as To-Do items in Tasks.



- Left click again to indicate complete



- Right click the **Flag** icon on any email for specific timeframes or to schedule a reminder



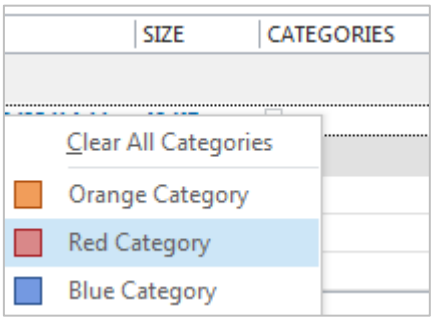
Categories

Establishing categories for managing mail will only apply to your own account. Other users will be able to define and apply their own account

Apply categories

1. Right click in **CATEGORIES** section to access category menu
2. Click on a category to apply

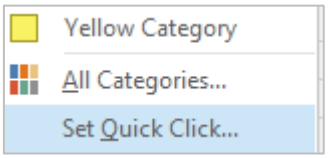
This can be repeated to apply multiple categories.



Notes

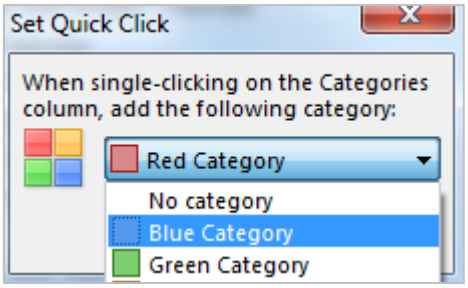
Apply a category with one click

1. Right click in **CATEGORIES** section to access category menu
2. Select the **'Set Quick Click…'**



3. Choose a category to be applied
4. Click **OK**
5. Left click on an email in the Categories section

The defined category will be applied to selected messages

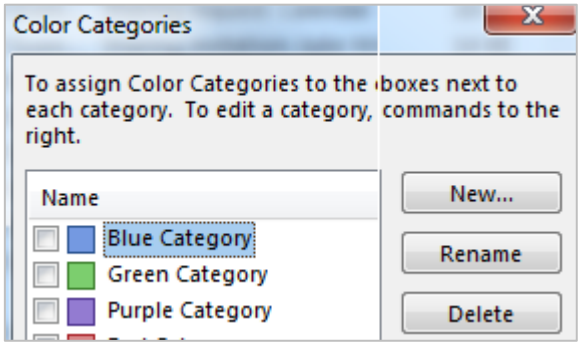


Customise Categories

1. Right click an email > **All Categories**

OR

- Click the **Categorize** tool in the **Tags** group on the **Home** tab
- Select **Rename** or create **New** categories as required



Notes

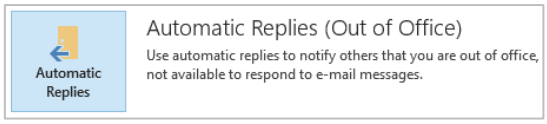
Out of Office Assistant

If you are not going to be responding to your emails for an extended period the Out of Office Assistant can be used to send a response or forward your emails to a colleague. It is possible to schedule your out of office period ahead of time.

Important: Any rules set using Out of Office Assistant will apply each time you use it – including forwarding arrangements etc. Remember to disable/remove any rules for the Out of Office Assistant when they are not required.

Exercise 9. ***Schedule an out of office message***

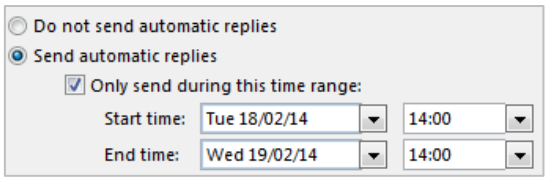
1. Click the **File** tab
2. Click **Automatic Replies**



3. Click **Send automatic replies** to send replies until manually disabled

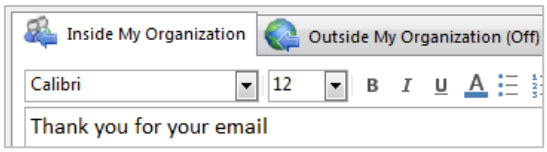
OR

- **In addition**: check '**Only send during this time range**' to schedule an automated period

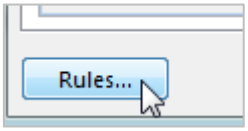


4. Enter a message/s which will be sent in response to any email during your absence

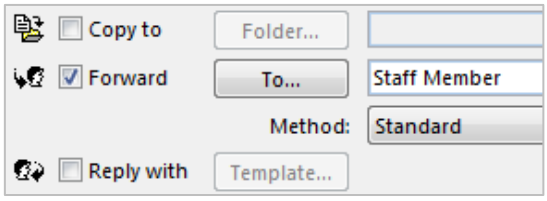
Outside the organisation is generally defined as anyone without a valid UQ email address.



5. Click the **Rules** button

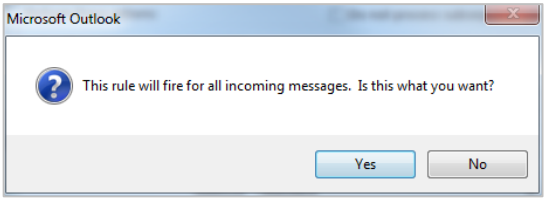


6. Click **Add Rule…**
7. Check the **Forward** box and then click the **To…** button
8. Select a colleague
9. Click **OK**



10. Confirm email forward for all emails by clicking **Yes**

These rules will be used each time you schedule an out of office period unless they are disabled or deleted.



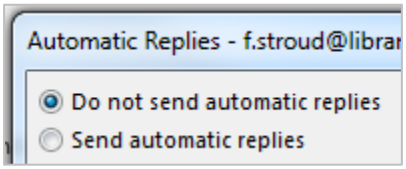
11. Click **OK** to confirm the rules
12. Click **OK** to schedule the out of office period

Notes

To stop Automatic Replies

13. Click on **File**
14. Click on **Automatic Replies** button

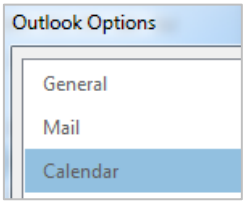
15. Select '**Do not send automatic replies**' button
16. Click on **OK**



The Outlook Calendar

Exercise 10. ***Customise calendar settings***

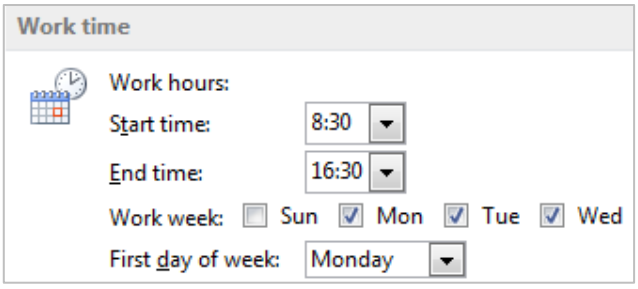
1. Click the **File** tab > **Options**
2. Select the **Calendar** menu item



Set work hours

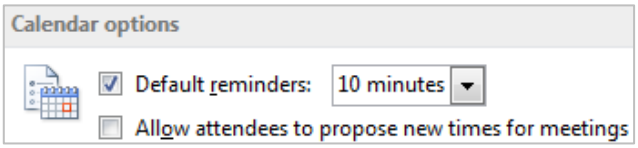
- Update work schedule to show others your usual work hours.

This will adjust shaded sections on the days you select.



Adjust default meeting reminder

- Adjust the **Default Reminders** dropdown in **Calendar options**

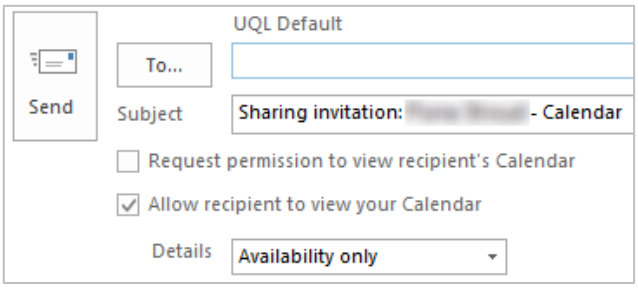


Exercise 11. ***Share your calendar***

1. Go to **Calendar** section of **Outlook**
2. Click **Share Calendar** in the **Share** group

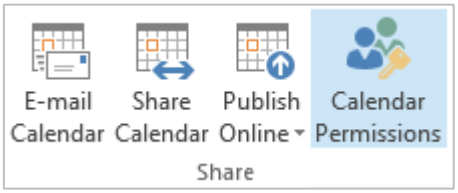
Notes

3. Choose recipients
4. Check **Request Permission to view recipient's calendar** if appropriate
5. Click **Send**



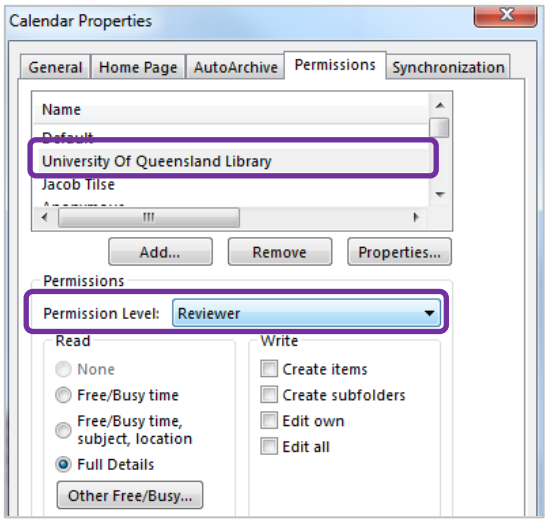
Customise sharing permissions

1. Click **Calendar Permissions** on the **Share** group



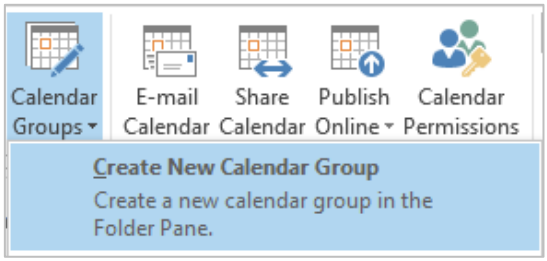
2. Select the staff member and update their permissions as required
3. Click on **OK**

Sharing your calendar enables Read permissions only. You will be required to customise the Write and Delete permissions as required.



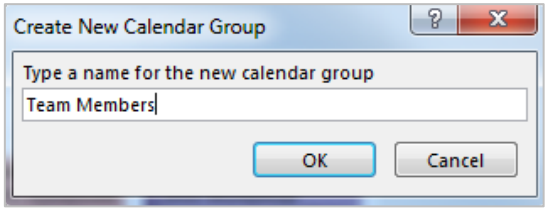
Exercise 12. ***Group shared calendars***

1. Click **Calendar Groups** > **Create New Calendar Group**



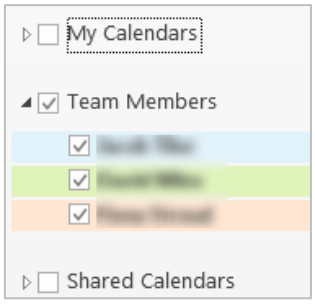
Notes

2. Enter a group name and click **OK**



3. Add group members and click **OK**

The group will appear in the navigation bar. Calendars can be turned on and off as required



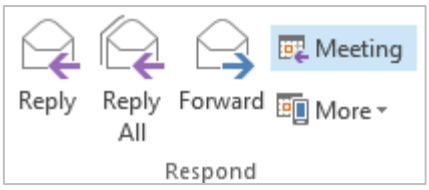
Appointments and meetings

Appointments and meetings are similar in Outlook, with one main difference: meetings have attendees, and generate invitations, appointments do not.

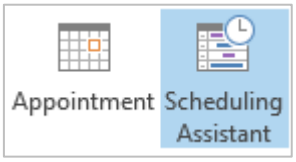
Exercise 13. ***Schedule a meeting***

1. Home Tab > Inbox > select any email.
2. Click the **Meeting** button in the **Respond** group

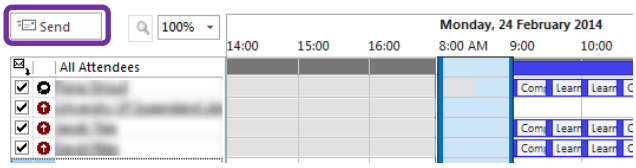
When you click Send – meeting invitations will be sent out to recipients.



3. Click the **Scheduling Assistant** button
4. Add recipients



5. Select a date and time, based on the displayed availability
6. Click on **Send**



Converting appointments and meetings

Convert meeting to appointment

- Click **Cancel Invitation**

Convert appointment to meeting

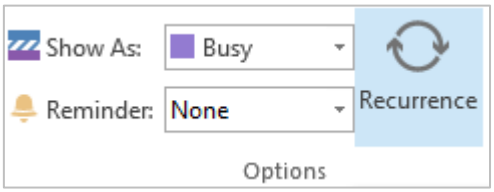
- Click **Invite Attendees**

Notes

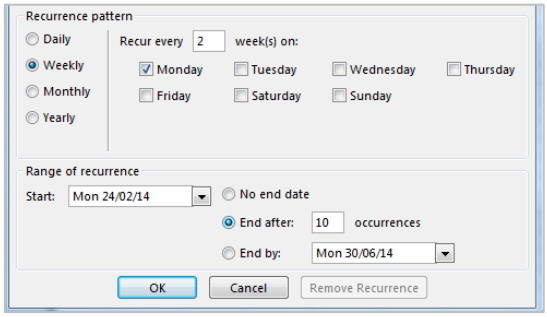
Recurring appointments

When setting up a meeting:

1. Click the **Recurrence** button in the **Options** group



2. Select recurrence options including frequency and an end date
3. Click **OK**



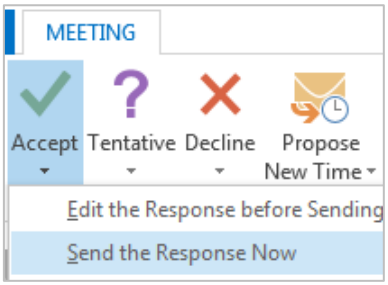
This offers an invitation to recipients to a series of meetings which will be entered into their calendar.

Exercise 14. ***Respond to meeting invitations***

An Outlook meeting invitation is an enhanced email with Yes, Tentative and No buttons on it. It is good practice to answer these invitations and to have Outlook send a response. This ensures that meeting convenors are aware of attendance and can reschedule if necessary.

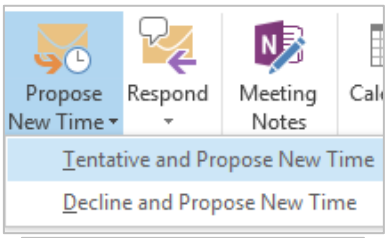
Click the email invitation:

1. Click one of the attendance options: **Accept/Tentative/Decline**
2. Choose the **Send the Response Now** option

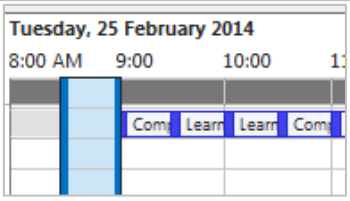


OR

- Click **Propose New Time** with a provisional Tentative or Negative response



- Alter the start and end times and click **Propose Time**



Notes

Exercise 15. ***Print your calendar***

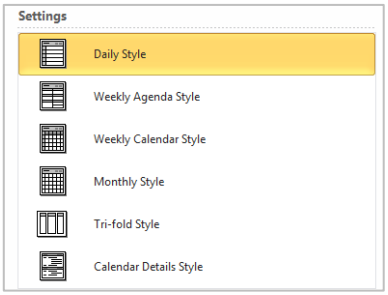
In the Calendar section:

1. Click the **File** tab
2. Click **Print**

OR

- Press **CTRL + P**

3. Alter the Calender **print settings**
4. Click **Print**



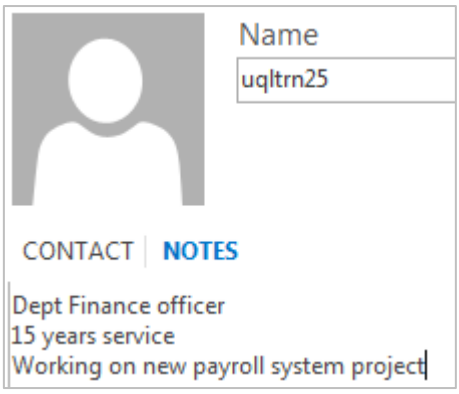
People

Contacts can be found by clicking the People heading. Contacts can be updated or have notes recorded against them. They can be added to email distribution lists and organised in Contact Folders and the folders into Folder Groups.

Exercise 16. ***Add notes to a contact***

Go to the **People** section:

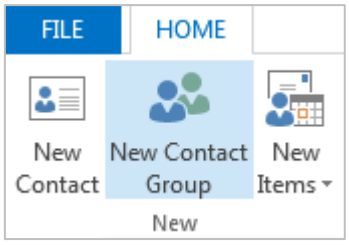
1. Double click a contact
2. Click **Notes**
3. Add relevant notes about **relevant interactions** with this user



Exercise 17. ***Create a contact group***

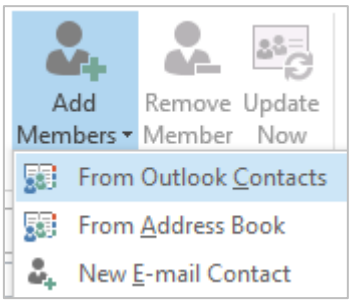
A contact group is an email distribution list you can access from any of the address fields when creating an email or meeting.

1. Click **New Contact Group**

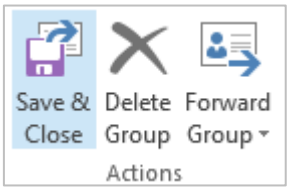


Notes

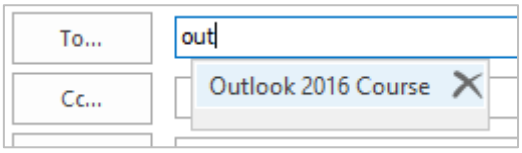
2. Enter the name '**Outlook 2016 Course**'
3. Click **Add Members** > **From Outlook Contacts**



4. Select contacts as appropriate
5. Click **Save & Close**



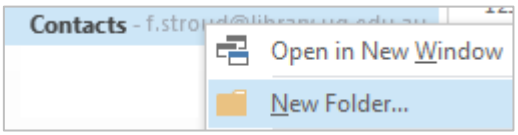
This group will now be available via autocomplete when you start typing a recipient when sending an email.



Exercise 18. ***Create a contacts folder***

Contact folders hold individual and groups of related contacts.

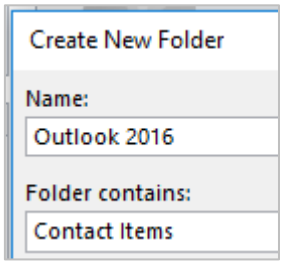
1. In the Navigation Bar right click on the **Contacts** folder
2. Click **New Folder…**



3. Type in the name: '**Outlook 2016**'
4. Select the **Contacts** folder

Ensure a subfolder isn't selected

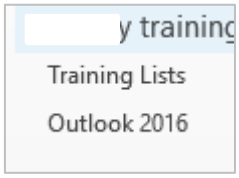
5. Click **OK**



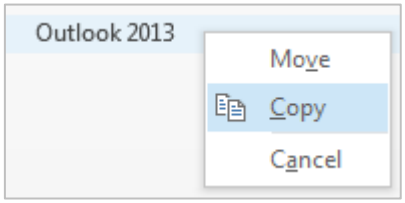
Populate folder with contacts

1. Select the Contacts folder
2. Locate existing contacts and contact groups

Changing the **Current View** to **List** may speed this process.

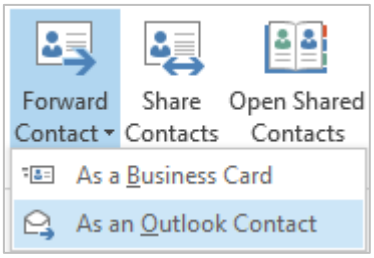


3. Hold down the right mouse button over a contact and drag and drop it into the '**Outlook 2016**' folder
4. Click the **Copy** menu option

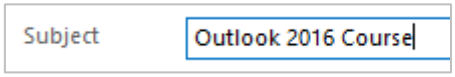


Notes

Exercise 19. ***Share a contacts folder***



1. Select the **Outlook 2016** contact folder
2. Click **Forward Contact** in the **Share** group of the **Home** tab > **As an Outlook Contact**



3. Add recipients to the email and change subject to Outlook 2016 Course
4. Click **Send**

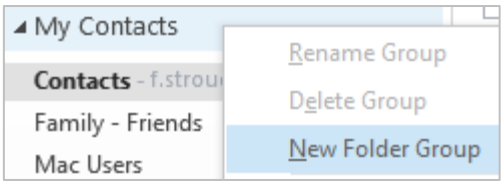
The contacts will be sent as an attachment.

Save a contact attachment

5. Click and drag the attachment over the **Contacts** section
6. Drop the contact into a contacts folder

Exercise 20. ***Create folder groups for contact folders***

Contact groups are essentially an organisational device which groups contact folders.



1. Right click the **My Contacts** folder group
2. Click **New Folder Group**

3. Name the group '**Outlook Training**'
4. Drag the '**Outlook 2016**' contacts folder into the '**Outlook related**' folder group

Notes

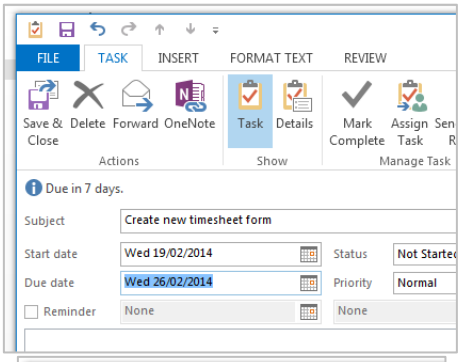
Tasks

The Tasks section contains basic functionality for creating, assigning and tracking progress of activities. Its primary benefit is its integration with Outlook. Emails that have been flagged will appear in the To-Do List in the Tasks section.

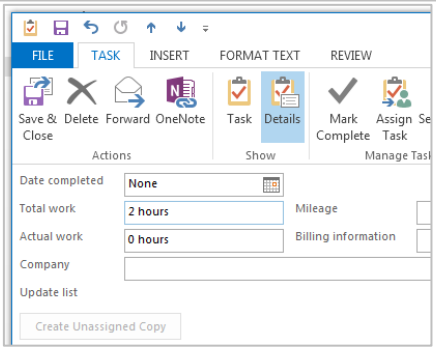
Exercise 21. ***Create a task***

In the Tasks section:

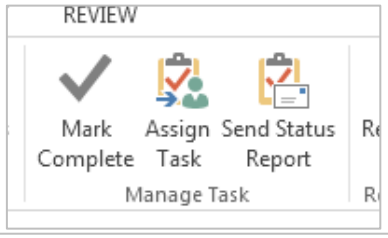
1. Click **New Task**
2. In the Subject field, type: '**Create new timesheet form**'
3. Set the start date as today and the finish date **one week from today**



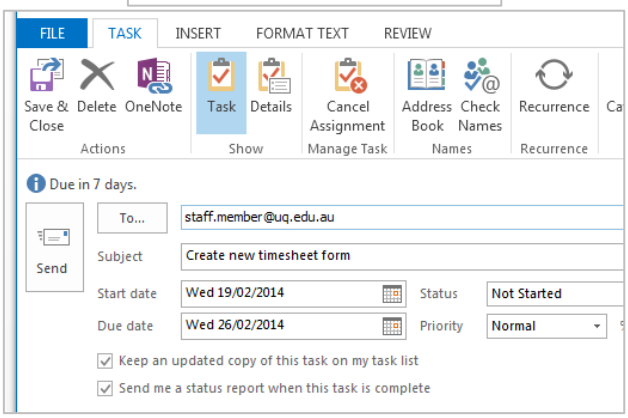
4. Click **Details** in the **Show** group
5. Add '**2 hours**' to the **Total work**: field
6. You can now save this task for completion or assign it to someone.



Exercise 22. ***Assign the task***



1. Click **Assign Task** in the **Manage Task** group
2. Add a recipient
3. Add any relevant details
4. Click **Send**

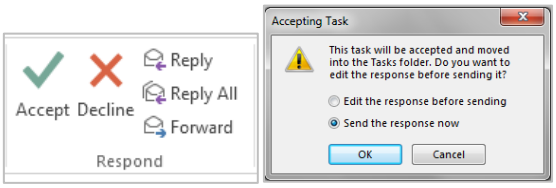


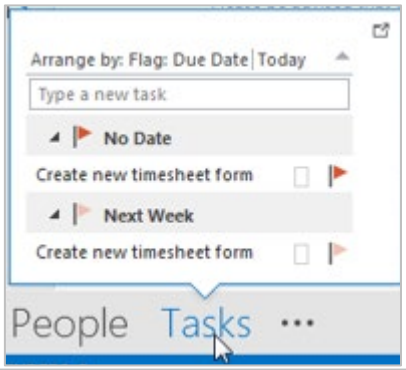
Notes

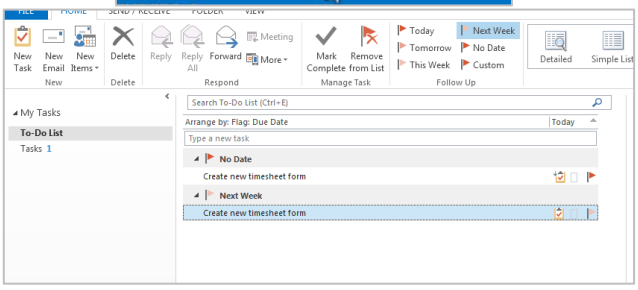
Completing an assigned task

In the Mail section when a task assignment arrives:

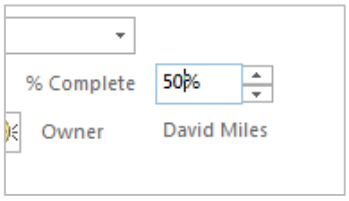
1. Click **Accept** or **decline** as appropriate.
2. Either send a custom response or simply an automated acceptance or rejection notification
3. Hover on Tasks at the bottom to see a quick view of your tasks

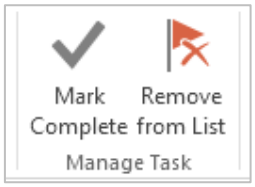






4. Go to the **Tasks** section and click the **Tasks** list:
5. Double click the **Task** to update it including **% complete**
6. Click **Mark Complete** when the task is completed





Notes