

## **Course Manual: OUTLOOK**



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## TABLE OF CONTENTS

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➤ THE OUTLOOK ENVIRONMENT .....	4
➤ SET UP YOUR ACCOUNT. ....	4
➤ NAVIGATION PANE .....	5
What is the Navigation Pane?.....	5
Change the display of the navigation pane. ....	5
➤ VIEWS - ORGANIZE THE PREVIEW OF YOUR OUTLOOK. ....	6
Folder Pane .....	6
Resize the folder pane. ....	6
Reading Pane .....	6
To-Do Bar .....	6
Favorites pane.....	7
➤ MAIL.....	7
Save time viewing, creating, and managing your email messages.....	7
➤ CREATE AN EMAIL MESSAGE. ....	8
Send an Email.....	8
An acknowledgment of receipt.....	9
Read receipts. ....	9
Follow the delivery receipts.....	10
Mark messages as read or unread .....	10
Number of rows to view in a message .....	11
Reply to or forward a message. ....	11
Suggested Replies.....	12
➤ SPELLING AND GRAMMAR .....	12
➤ TEXT FORMAT .....	13
Reproduce formatting. ....	14
➤ FIND A SYNONYM.....	14
➤ STATISTICS .....	15
➤ INSERT ATTACHMENT(S) .....	16
Attach files without searching for them.....	16
Add an attachment to an email message.....	16
Open or save an email attachment.....	16
Open an attachment. ....	16

Save an attachment.....	16
Delete an attachment.....	17
↳ MESSAGE MANAGEMENT .....	17
Organize and sort your messages. ....	17
↳ FOLDERS MANAGEMENT .....	18
Create a folder. ....	18
Create a rule for a folder. ....	19
CHANGE or delete a rule about a folder .....	20
↳ CREATE A SIGNATURE.....	20
Add a signature. ....	21
↳ SPAM MANAGEMENT .....	22
↳ CREATE A SIMPLE TEMPLATE.....	23
↳ SEARCH TOOLS .....	24
Find an item. ....	24
↳ PEOPLE.....	26
Create a contact. ....	26
Modify a contact. ....	28
Forward a contact. ....	28
Contact Group - Distribution List .....	29
Create distribution lists (or contact groups).....	29
Add - Remove member – delete group. ....	30
↳ CALENDAR.....	30
Create a calendar appointment. ....	30
Configure a recurring event.....	31
Create an event. ....	31
Schedule a meeting .....	33
Accept or decline an invitation .....	33
Follow-up of invitations.....	34
↳ SET A REMINDER. ....	34
For appointments or meetings .....	35
For email, contacts, and tasks.....	35
↳ SORT BY COLOR CATEGORIES .....	36
Add, rename, or delete a category. ....	36
↳ EXPORT CONTACT LIST .....	37
Export contacts, messages, calendar, notes.....	37

➤ IMPORT YOUR CONTACTS. ....	39
Open the FILE (. pst) grouping your contacts. ....	39
➤ TASKS .....	40
Create a task. ....	40
Assign a task. ....	41
Accept or decline an assigned task. ....	42
View a task. ....	43
➤ PRINT AN EMAIL, CONTACT, OR CALENDAR ITEM OR A NOTE. ....	44
➤ TO DO .....	44
Understanding Display in To Do? .....	44
Normal Task .....	45
Task in To Do .....	46
➤ NOTES .....	47
Create a note.....	47
➤ VOTING BUTTONS .....	48
Use voting buttons to create or respond to polls. ....	48
Track and print survey results.....	49
➤ ABSENCE MANAGER.....	50
Set up an automatic reply.....	50
Create a rule (Out of Office) .....	51
Turn off automatic out-of-office responses. ....	51

# OUTLOOK

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## → The Outlook environment

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Outlook organizes your **emails, calendars, contacts, tasks**, and to-do lists; all from a single location. This organization starts with your email account. From there, you can start using emails, convert them into tasks or appointments, and save information about the people you communicate with regularly, so you never have to remember an email address or phone number.

This software alone allows a real unified management in real time, of all your activities.

Microsoft Outlook allows you to work efficiently and quickly. In addition, Outlook Web App, and synchronization with smartphones (iPhone, BlackBerry) allows for more active tracking and invaluable time savings anytime, anywhere.

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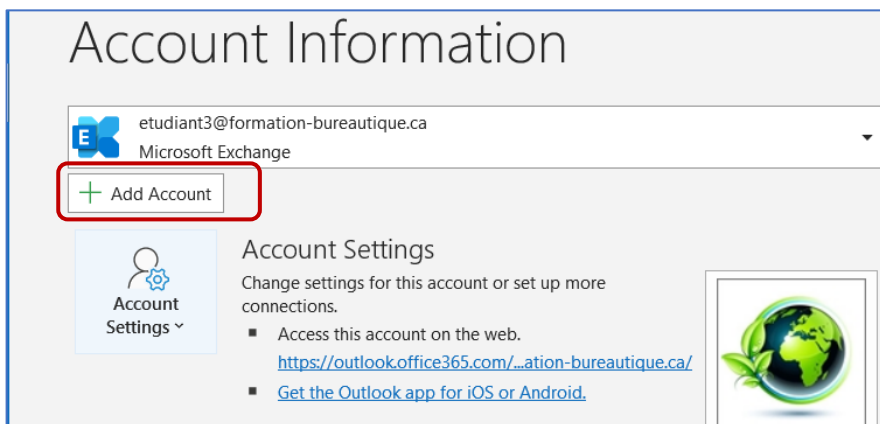
## → Set up your account.

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Your first action is to set up your Outlook account. After that, you will be able to start to receive and send emails, use the calendar, create contacts, and use Outlook tasks.

The configuration is automatic if you are using an earlier version of Outlook on the same computer. If not, automatic account configuration runs the first time Outlook starts and guides you through the process.

You are asked to provide your name, email address and a password. This is usually enough, but if automatic configuration fails, Outlook asks for some additional information, such as the name of your email server. If you do not have this information, your email provider can provide it to you.



If you want to add another email account later, when you're ready, select **File, Add Account** to start automatic account setup.

## → Navigation pane

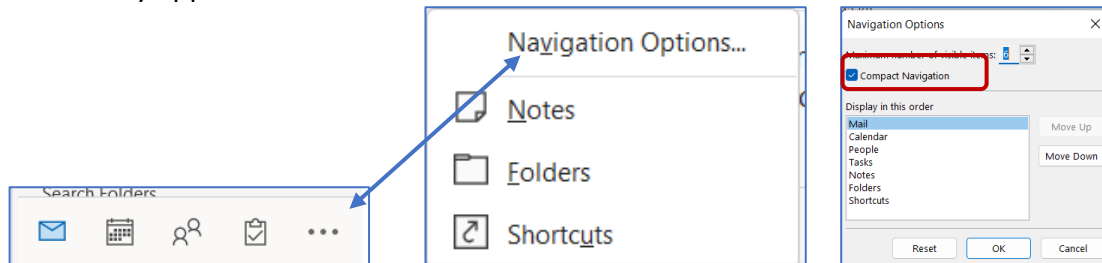
### What is the Navigation Pane?

The **Navigation Pane** appears on the left side of the Outlook window and allows you to switch between different areas of Outlook, such as **Mail**, **Calendar**, **Contacts**, **Tasks**, and **Notes**. Additionally, when you work in a view, the Navigation Pane displays the folders in that view.

When you click a folder in the Navigation Pane, that folder becomes the current folder, and you can work with the items in it. For example, in **Mail**, click the Inbox folder to view new email messages. This becomes the **folder pane**.

### Change the display of the navigation pane.

You can control which buttons (or icons) appear in the Quick Access Bar and the order in which they appear.



- Click on the three small dots, then choose "Navigation options".
- If necessary, **disable "Compact Navigation"** to get this display



In the **Navigation Options** dialog box, do the following:

- To change the number of buttons or icons that appear on the bar, increase, or decrease the default setting (4) for the maximum number of visible items.
- To display icons instead of names, select the Compact navigation check box.
- To rearrange how buttons or icons appear, select an item in the Display in this order box, and then select Move Up or Move Down. Click OK.



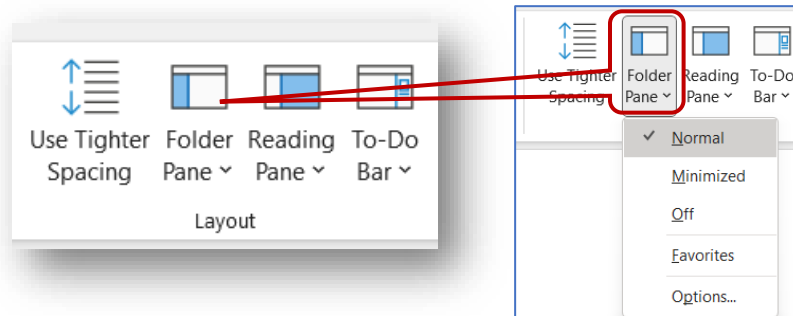
#### A little advice

*If you don't like the changes, you made or want to start over from the beginning, select **Reset**.*

## ➔ Views - Organize the preview of your Outlook.

### Folder Pane

To change the views as needed, click on the **View** tab, **Layout** group.



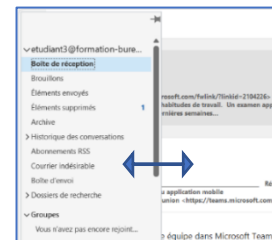
The folder pane is your browser through emails, sent items, drafts, deleted, and your folders.

It should always be in "**Normal**", if you collapse it, click on "**Pin the folder pane**", or go back to "**Folder pane**" to return to "**Normal**".

- Check the option that best suits your needs. This one is on the left of your screen

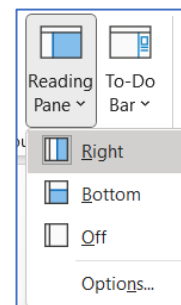
### Resize the folder pane.

- Point to the right border of the navigation pane. When the pointer changes to an arrow, drag the border to the right or left.



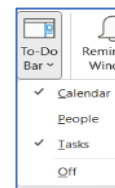
### Reading Pane

- You have the choice to display emails: either **right** or **bottom** or **off**



### To-Do Bar

- This display is on the right side of your screen

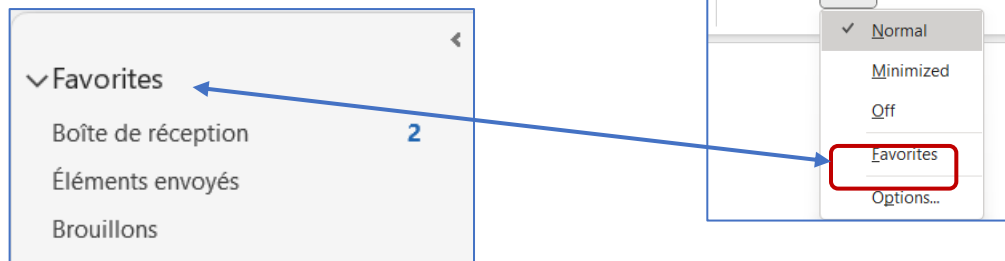


## Favorites pane

The **Favorites** feature can be turned off if you are not using it and want more space in the Folder pane. **Favorites**, located at the top of the Folder pane, contains shortcuts to folders that you use frequently.

You can't add or removed a folder in "**Favorites**". There is also no effect on the folders in the master folder list.

- In Mail, click View, Folder Pane, Favorites.
- If you turn Favorites off and turn them back on, the same folders are displayed.



## ➔ Mail

New features and improvements allow you to be more efficient if you know where to find them. Fortunately, thanks to Outlook's advanced **Ribbon**, discovering additional commands is extremely easy. You no longer waste time looking for them.

Want to make your life easier when you set up new or existing contacts, print messages, or clean up your mailbox? The new **Office** is here to help. You can now manage your account, customize your Outlook interface, and run printouts much more easily, all from one place.

## Save time viewing, creating, and managing your email messages.

Think about how many messages you receive each week compared to five years ago. We've redesigned Outlook to reflect this evolution so you can control the large volumes of information that come to you every day.

- Easily manage large volumes of email. All it takes is a few clicks to group or classify emails. With the new management and **display** tools, you can summarize dozens of messages to a few relevant items and focus on other tasks, without getting cluttered.
- Send the right information to the right people and be reactive in your responses. **MailTips**<sup>1</sup> alerts you immediately to potential distribution issues

<sup>1</sup> MailTips requires Microsoft Exchange Server 2016 to be installed and must be enabled by an Exchange administrator.

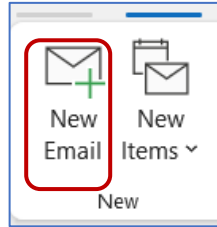


and **Quick Actions** reduces repetitive tasks, which usually require multiple commands, to a single click.

The Email section allows you to communicate with people inside and outside your organization. You can add an email signature and attachments to your emails.

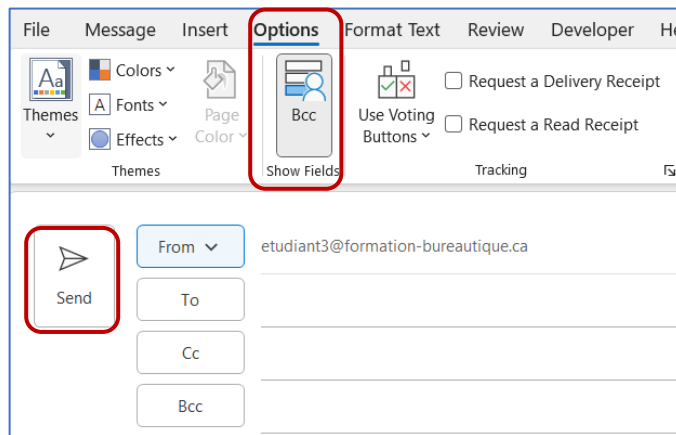
## → Create an Email message.

- From any email folder (for example, your inbox), select **New Email**.



- Keyboard shortcut: Press **Ctrl + Shift + M**.
- When you have finish writing your message, select **Send**.

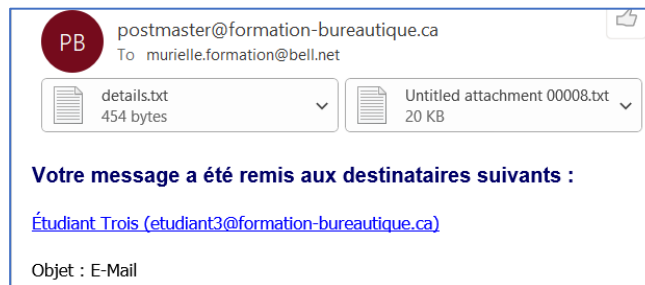
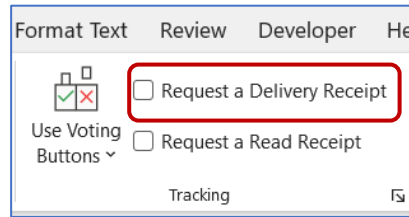
## Send an Email.



- "**To**" field represents the recipient of the email
- Field "**Cc**" Means "**Carbon copy**", an email is sent to two recipients. An email addressed to a person, but a copy sent as proof to a linked person.
- The field "**Bcc**" means "**Blind Carbon Copy**". This is the correct field to use when you want to send a "**hidden copy**". The addresses of the recipients registered in "**Bcc**" do not appear in the email received by the other recipients.

## An acknowledgment of receipt

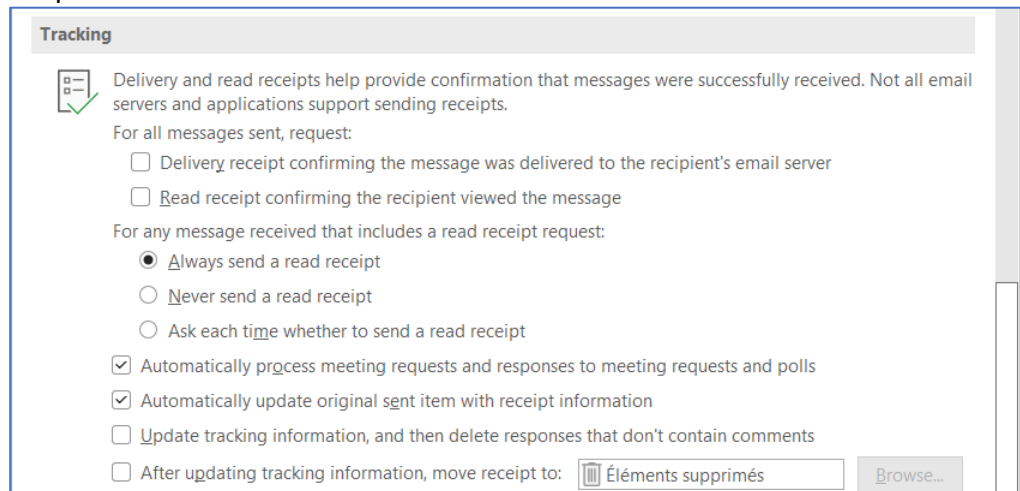
This confirms that your email has been delivered to the recipient's inbox, but not that the recipient has seen or read it.



## Read receipts.

However, the recipient of the message may refuse to send read receipts. In other cases, read receipts will not be sent, especially if the recipient's mail program does not support them. There is no way to force a recipient to send a read receipt.

- From the **File** menu, select **Options, Mail**.
- Under **Tracking**, select the check box **Delivery receipt** confirming the message was delivered to the recipient's email server or **Read receipt** confirming the recipient viewed the mail.





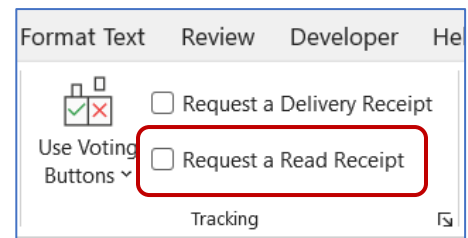
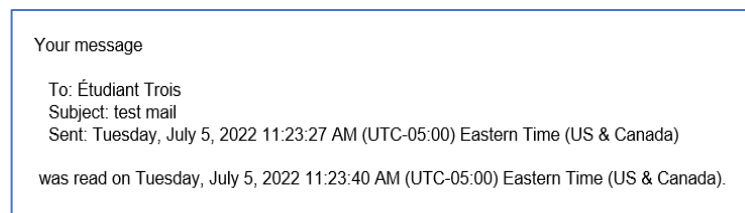
*We recommend tracking only important messages, not all messages.*

In a new email message, on the Options tab, "**Tracking group**", select the check box **Request a Delivery Receipt** or **Request a Read receipt**. Or enable both options.

### Follow the delivery receipts.

If your messages are important and you want to keep them. Create a folder in your inbox that you can call: "**Important**" or "**Proof of receipt**" and move your message (Delivery Receipts) to the folder.

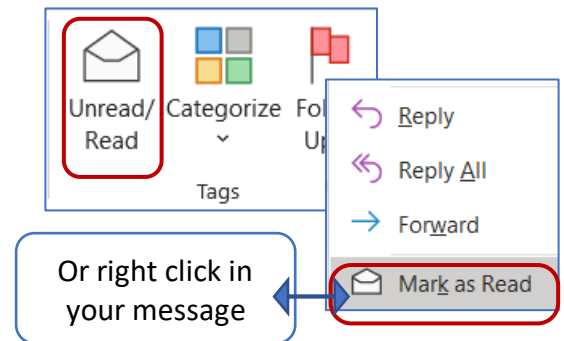
(See example of a delivery receipt below)



### Mark messages as read or unread

Even if a message has been opened, you may want to mark it as unread to get your attention. You could also use the option of a flag to better manage your emails. (See **Follow up**)

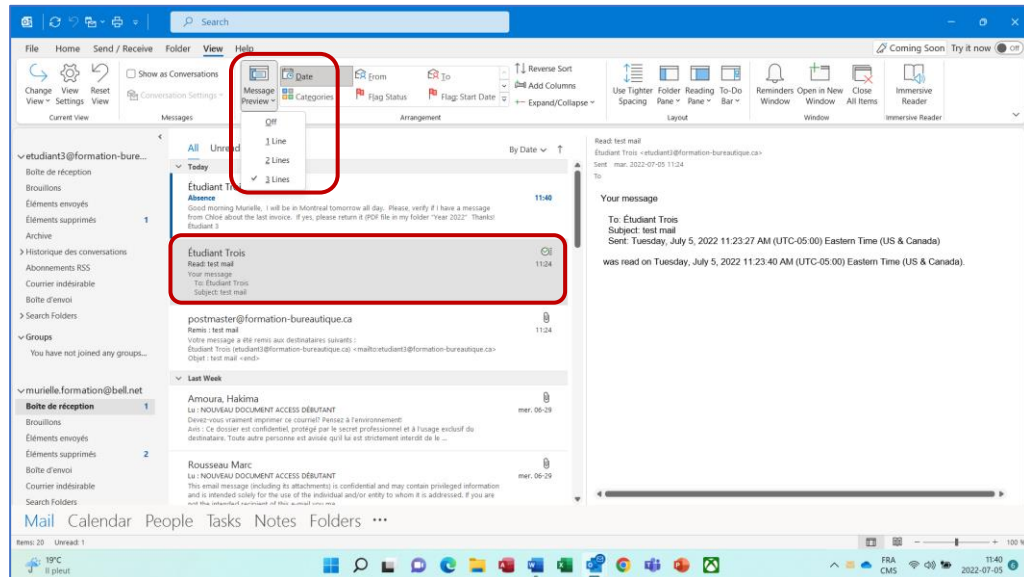
- Click in **Home, Tags** group, check Unread.
- OR
- Click the **File** tab
- Click **Options**
- Click Advanced
- Under Outlook Panes, click Reading Pane
- To enable this feature, select the box Mark items as read when viewed in the Reading Pane, and then enter a number in the box Wait X seconds before marking item as read.



## Number of rows to view in a message

In general, in the preview of a message we only see the first line of the email, so here's what to do to get a little more.

- Click on the **View** tab, **Arrangement** group, Message Preview
- Check the number of rows you want.



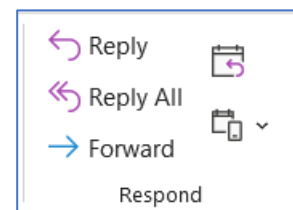
## Reply to or forward a message.

1. On the ribbon or in the reading pane, select **Reply**, **Reply All**, or **Forward**.



2. In the **To**, **Cc**, or **Bcc** box, do one of the following:

- To add a recipient, click in the appropriate box, insert ";" and enter the recipient's name.
- To delete a recipient, click in the appropriate box, select the recipient's name, and then tap Delete.
- You can delete part of the original message to keep some privacy especially when you are forwarding a message.
- **Reply**: To reply only to the sender
- **Reply All**: for all recipients.
- **Forward**: All attachments are automatically included when you forward the message



## Suggested Replies

Something new with Outlook: when you receive an email message that you want to answer with a short reply. Outlook suggests three responses that you can use to easily reply. Suggested replies are computer-generated and use natural language to provide response options.



### Exemple

Start your reply all with:

Confirmed!

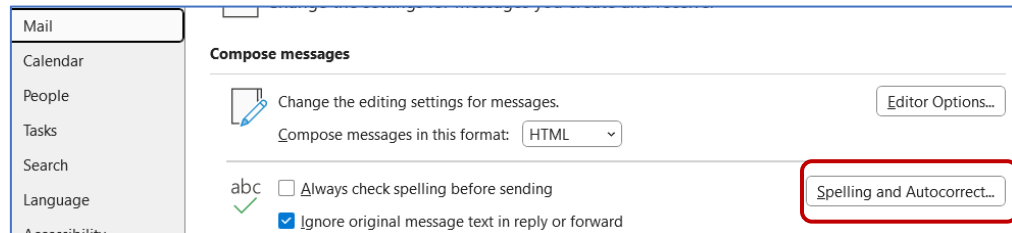
Confirmed, thank you.

Confirmed, thanks!

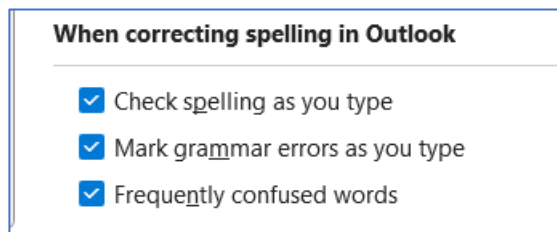
## → Spelling and grammar

You can set your program to automatically correct misspelled words that are similar to words in the main dictionary that the spelling checker uses.

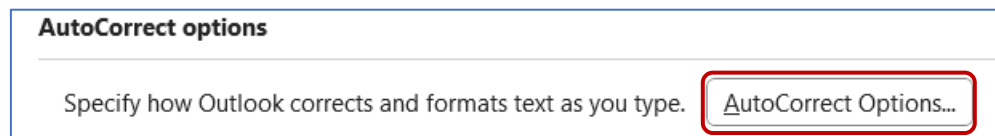
1. Click **File**, and then click **Options**
2. Click **Mail**
3. Click in "**Spelling and Autocorrect...**"



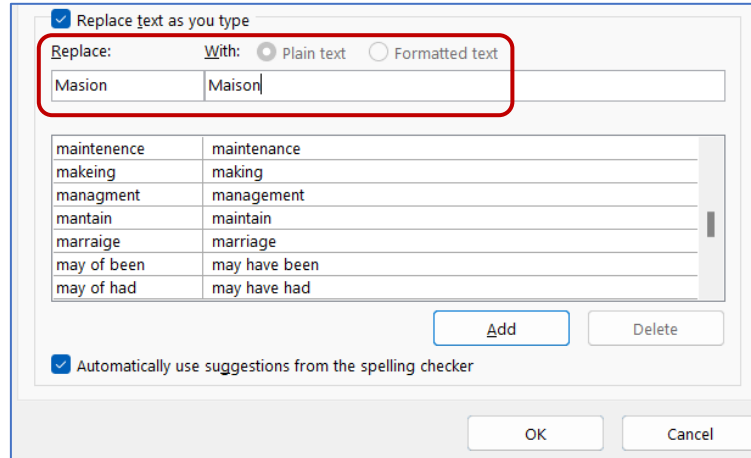
4. Make sure you have the checkmark in the two boxes near the bottom of the "**When correcting spelling in Outlook**" window



5. Then click "**AutoCorrect Options...**"

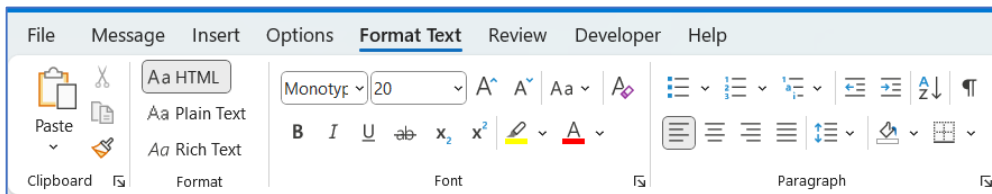


6. If you make the same mistake over and over again when typing text  
Example: You type "**MASION**" instead of "**MAISON**"
7. In « **Replace** » box, type Masion and « **With** » type Maison, then click on « **Add** »



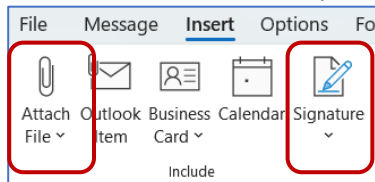
## → Text Format

Editing the text is done in the "**Format Text**" tab, "**Font**" and "**Paragraph**" group

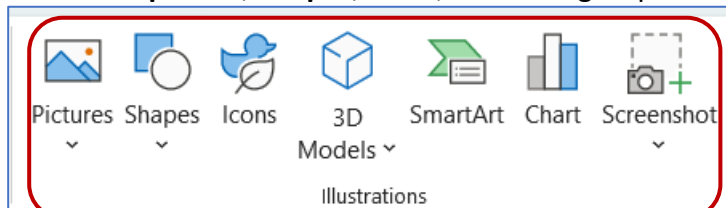


The "**Insert**" tab is not to be neglected

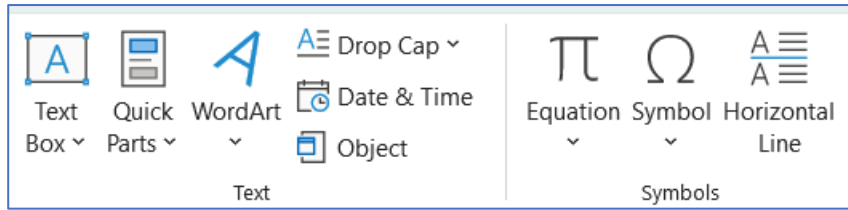
- To insert an **attachment**, "**Include**" Group also to insert a **signature**



- To insert a **picture**, **Shapes**, **Icons**, etc. from group "**Illustrations**"

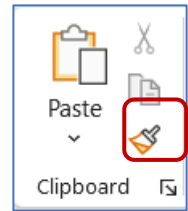


- Group "Text" and "Symbols".



### Reproduce formatting.

- From the **Home** tab, you can apply formatting to selected text and basic formatting to graphics, such as borders and fills.
- Select the text that has the formatting you want to copy.
- If you want to copy the formatting of the text, select a portion of a paragraph. If you want to copy the text and paragraph formatting, select an entire paragraph, including the paragraph marker.
- Click the Format Text tab in the Clipboard group, click Reproduce Formatting.
- The pointer changes to a brush.
- Click the items where you want the formatting to be applied.
- Double-click** the **Format painter button** if you want to change the formatting of multiple selections in your document.
- Select the text or graphic you want to format.
- To stop formatting, press **ESC**.

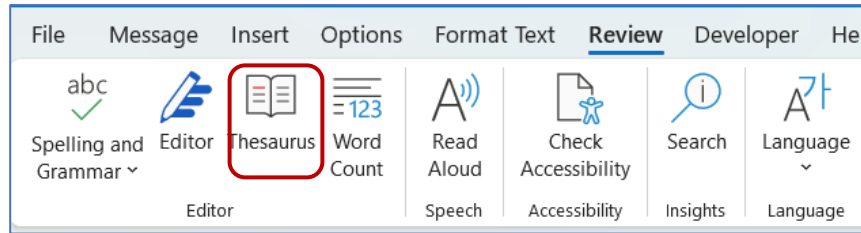


### Find a synonym

After you enter a term, you can search for a synonym to replace an occurrence. Word will help you with the thesaurus.

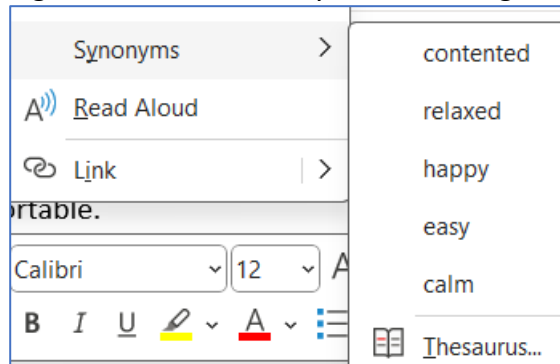
- Select the term for which you are looking for a synonym.
- Click the **Review** tab.
- Click **Thesaurus** in the **Editor** group.
- A pane on the right side of your screen will open and offer you several terms.
- From the synonyms, click the right arrow and click the **Insert command**.

- The selected term has been replaced with the synonym of your choice.



OR

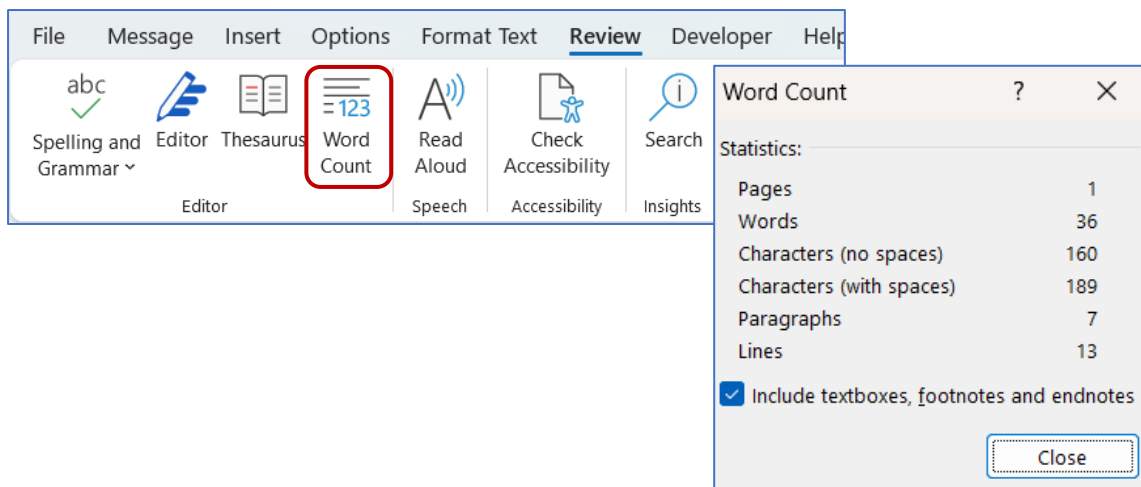
- Right-click on the word you are looking for a synonym



- Word will suggest several terms to you
- Select the term of your choice

## ➔ Statistics

As in Word, you want to know how many words, paragraphs we have in the email, here is how to do it? **"Review"** tab, **"Editor"** group **"Word Count"**





## ➔ Insert attachment(s)

### Attach files without searching for them.

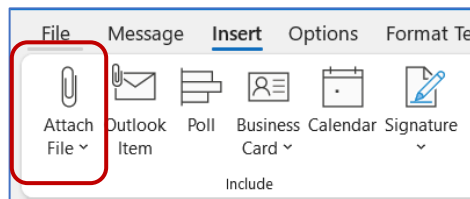
Need to attach an image or document? Outlook saves you time by keeping a list of your recently used files. Click the **Attach File** button when you create a message or meeting invitation and select the file you want to attach.

To participate in an existing group, start by searching for its name. On the **Home** tab of the Outlook application window, enter a keyword or phrase in the **Search for people** box, and then click to select the group you want to participate in.

### Add an attachment to an email message.

To share a file, you can attach it to your message. You can also attach other Outlook items, such as messages, contacts, or tasks.

- Create a new message or select an existing message, and then select **Reply**, **Reply All**, or **Forward**.
- In the message window, select **Message, Attach File**.



- Files used and / or saved recently will be in the list, this new option in Outlook will allow us to insert a file faster instead of using: Browse and search for the file to insert.

### Open or save an email attachment.

You can open an attachment from the reading pane or from an open message. After opening and viewing an attachment, you can save it. If a message contains multiple attachments, you can save them as a group or individually.

### Open an attachment.

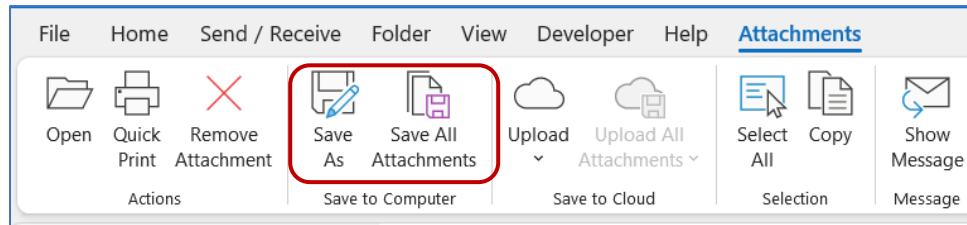
Depending on the version of Outlook you are using, there may be several options available to open an attachment.

- Double-click the attachment.

### Save an attachment.

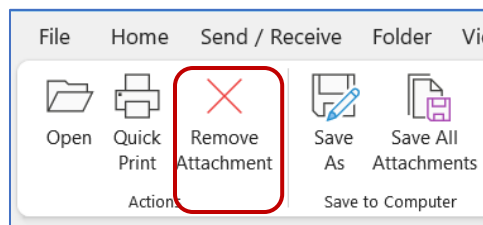
- Select the attachment in the reading pane or the open message.
- On the **Attachments** tab, in the **Actions** group, select **Save As**. You can also right-click the attachment, and then select **Save As**.

- If you have multiple attachments, click **Save All Attachments**.



### Delete an attachment.

- To keep a message but you want to delete the attachment because it is too large a file (Example: "PDF"), tap **Remove attachment**.
- You keep the message, but the attachment is no longer in the message.



## ➔ Message Management

It is important to organize all our messages. Sometimes, to facilitate the work, it is necessary to modify the display to identify certain messages.

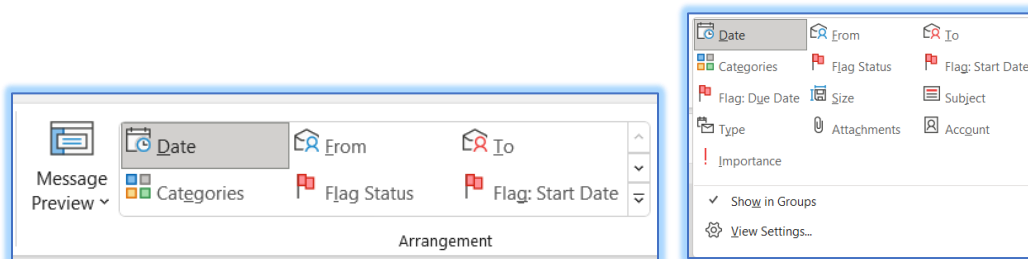
That's why the **Organize** option will come in handy.

### Organize and sort your messages.

**Organizing** means that we want to put in ascending or descending order our messages, we want to classify our messages, either by **Date**, **From**, **To**, **Attachments**, etc.

The **Show in Groups** option is also a way to better view your messages.

You will find **Organize** from the **View** tab, **Arrangement** group.

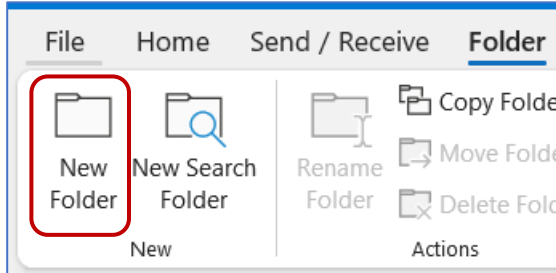


## ➔ Folders Management

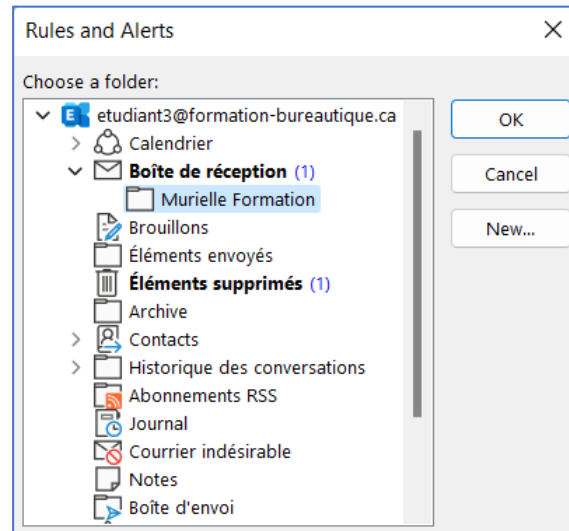
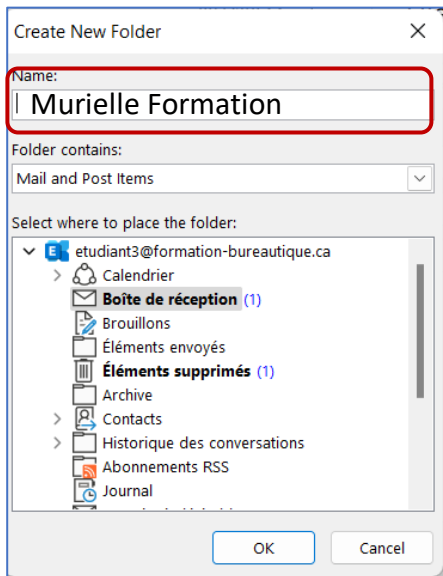
You can create folders in Outlook to organize your messages in your own way. For all messages from a particular contact, make sure that their messages automatically enter that folder.

### Create a folder.

- Click in the **Inbox**



- Click Folder from the **Folder tab**, Group ➔ **"New"**
- Give your folder a name. example: Name of the folder **"Important"** to drop your important messages that you do not want to delete and keep, but not in your inbox

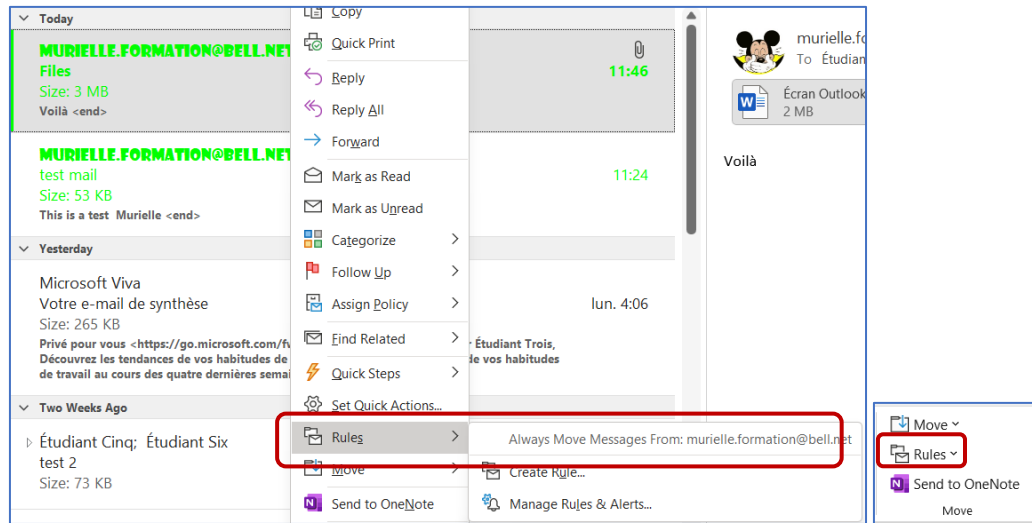


- Drag your messages to this folder

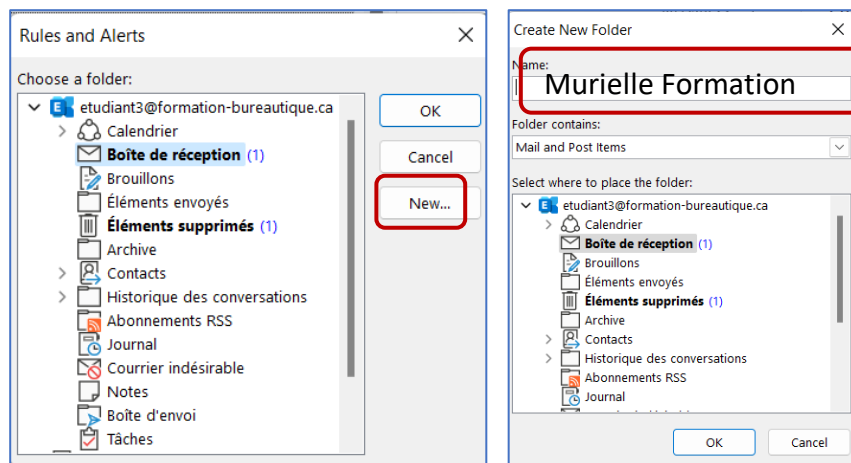
## Create a rule for a folder.

You can move all messages from a specific person to a folder.

- The first method would be to create the folder in advance as we just did in the previous step, we will see the second method in the next step.
- Click in one of the messages where you want to deposit all your emails from the same contact.



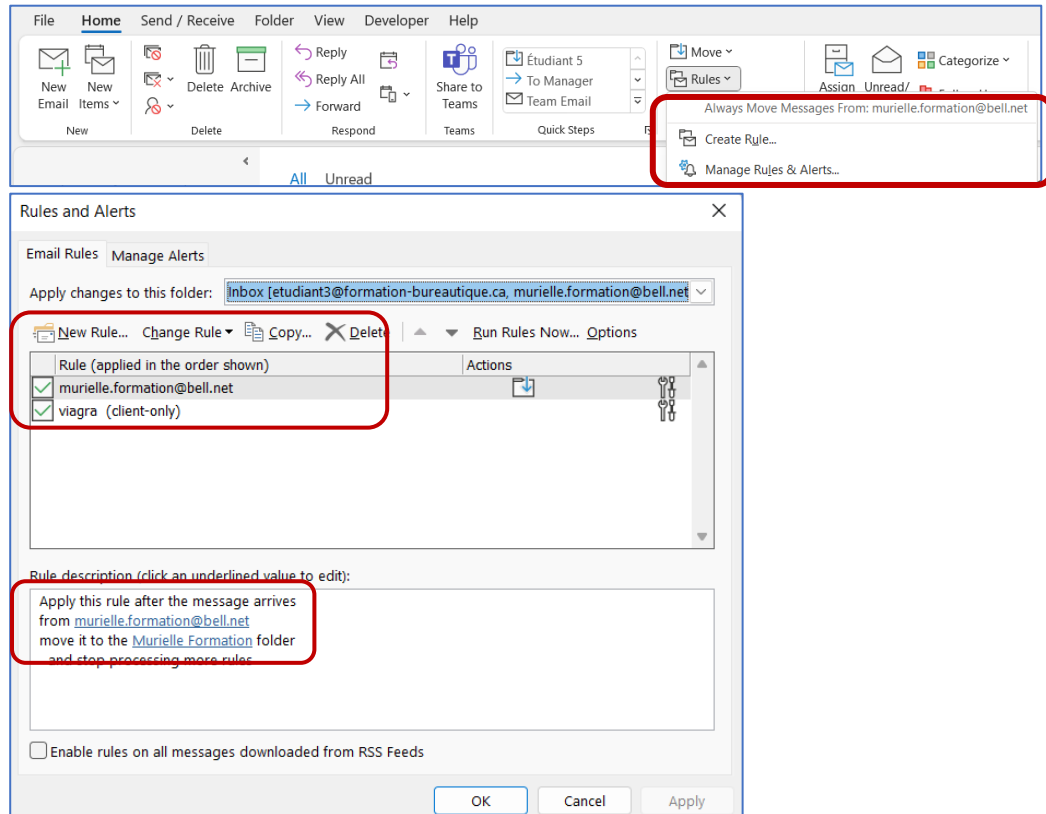
- Either right click, or **Home** tab, Group ►► **"Move"**, click in **Rules**
- Click **Always move messages from...** (Email address)
- Make sure you are in the inbox
- It is still time to create the new folder  
Click **"New"**



- Click **OK**

## CHANGE or delete a rule about a folder

- Click in Manage rules and alerts
- Click in the rule you want to **edit**

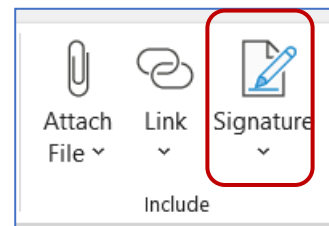


- Or click **Delete**

## ➔ Create a signature.

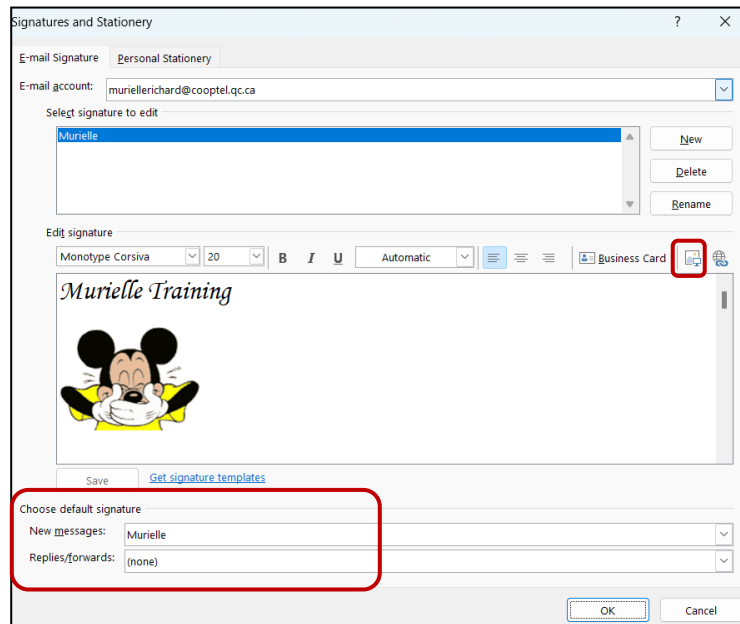
Create custom signatures at the bottom of your messages. Signatures can include text, images, your electronic business card, a logo, or even an image of your handwritten signature.

- 1 In a new message, select **Signature**, "Signatures" from the **Include** group.
- 2 On the **Email Signature** tab, select **New**.
- 3 Type a name, and then select OK.
- 4 Under **Choose default signature**, do the following:



- In the Email account list, select the email account to which you want to associate the signature.

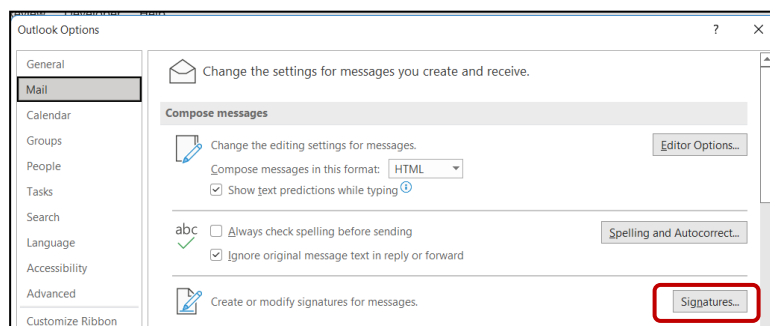
- In the New messages list, select the signature that you want to automatically add to all new email messages. If you ignore this option, the default value is (none).
- In the Replies/Forwards list, select the signature to add automatically (auto-signature) when you reply to or forward messages. Otherwise, accept the default option, (none).
- Under Edit signature, type signature
- Choose your Font, text size and logo image as needed.
- Then select OK



*You can have multiple signatures.*

## Add a signature.

You can create a signature from **File, Options, Mail, and then Signatures.**

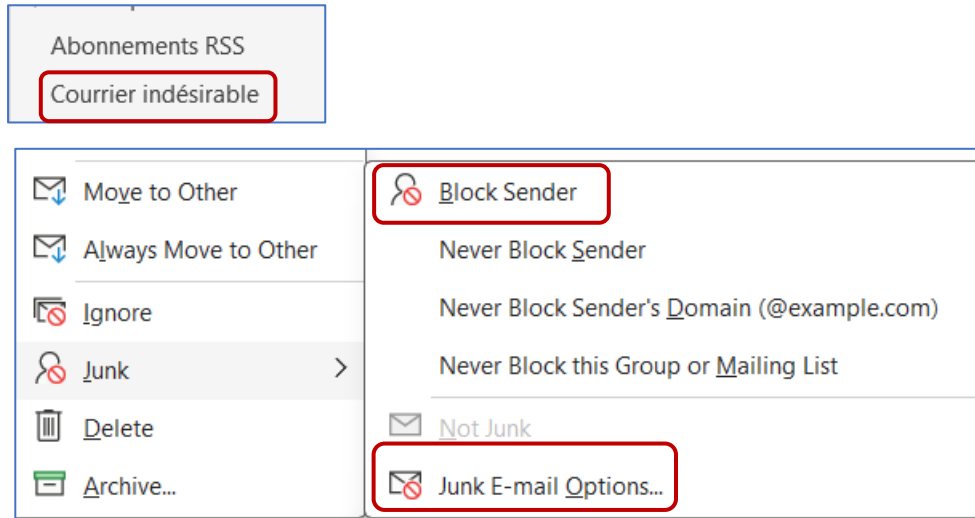


- In a new message, click **Signature**, and then select the signature you want

## → Spam management

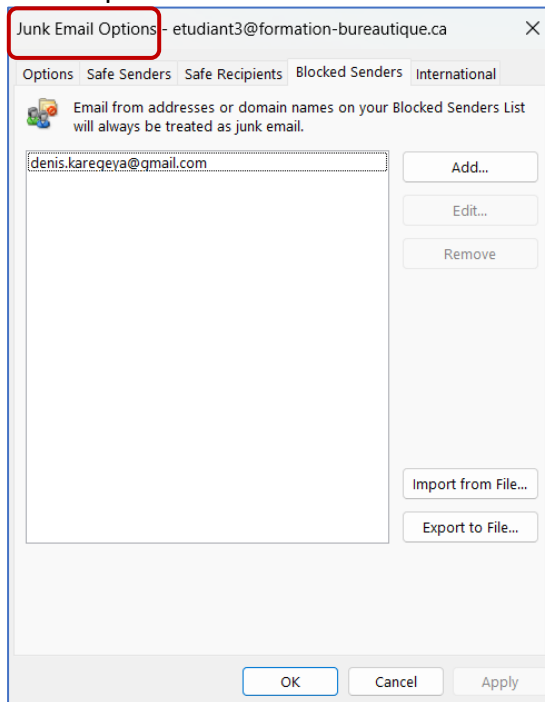
You can also create rules to **automatically delete certain** unwanted messages based on keywords, subject lines, or the sender of the email, for example.

You can also quickly block a sender by right-clicking on your email.



- Hover your cursor over **Junk Email**
- Click **Block Sender**

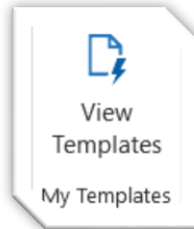
You can manage approved and blocked senders via Junk Email Options, click on "Junk Email Options"



## → Create a simple template.

The "My Templates" **add-in** allows you to create templates that you can then add to your messages.

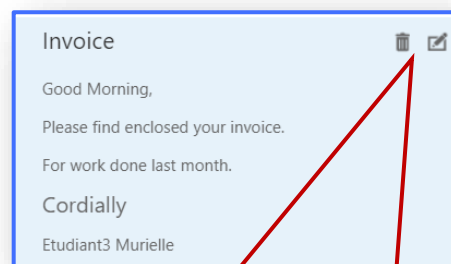
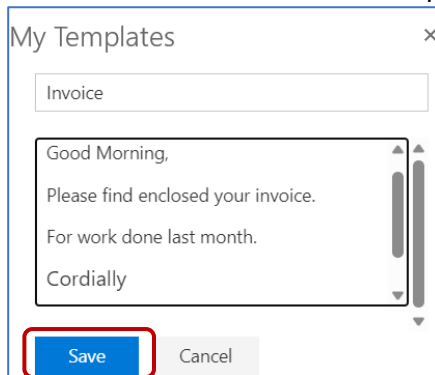
You can include text and images in your templates. However, it is a good idea to save your images to a location that you control, such as OneDrive for Business, because if you link to an image on the internet, it may be unexpectedly deleted, and the image link will be broken in add-in.



- Create a new message, click on "**View Templates**" group "My Templates"
- Use an existing template by clicking on it or create your own template by clicking



- Click **Save**. You can now use your template
- You can also create another template by clicking on "+ Template"



- Type your message, click "**Save**"
- You can edit or delete a template at any time by clicking on the **button at the top right of the window**.



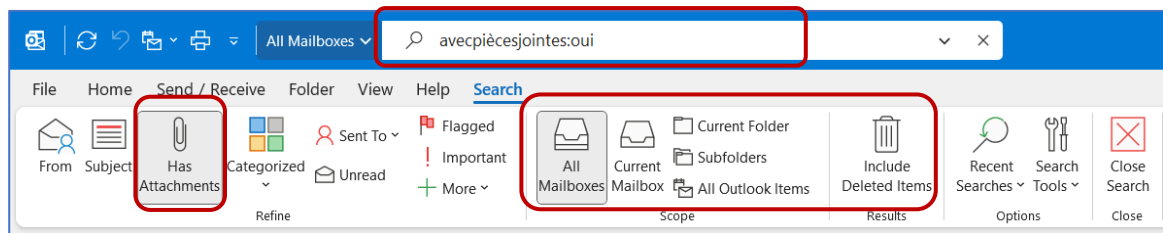
## → Search tools

Searching for a specific item can seem like a daunting task, especially when you don't really have time to go through all the folders and read every message in it. Fortunately, Outlook allows you to easily filter your data and find what you're looking for at the right time.

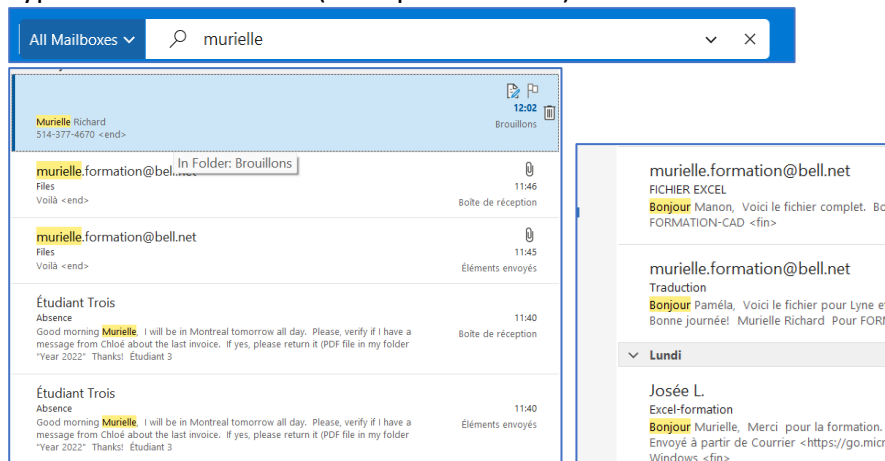
- Restrict your search with a few clicks: add additional criteria to limit your results, and include only items with attachments, over a certain period of time sent or items addressed to yourself or another recipient, etc.
- Quickly refine the scope of your search. Change the scope to expand the search to include subfolders, all email items, or all Outlook items.
- Manage your search options from the results. Change the scope and search options, or quickly go back to a previous search.

### Find an item.

- 1 In the Folder pane, click the folder to search for.
- 2 In the **Instant search** box, type your search text.



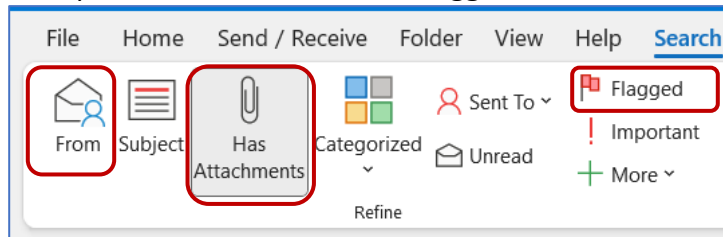
- 3 By default, the search goes to "All mailboxes".
- 4 It's up to you to edit immediately or in the "Scope" group.
- 5 Type "Hello" or a name (Example: Murielle) and "Enter" button



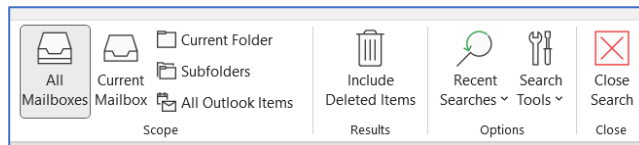
- 6 Items containing the text you typed appear with the text you were looking for highlighted.

- 7 To refine the search, choose more options.

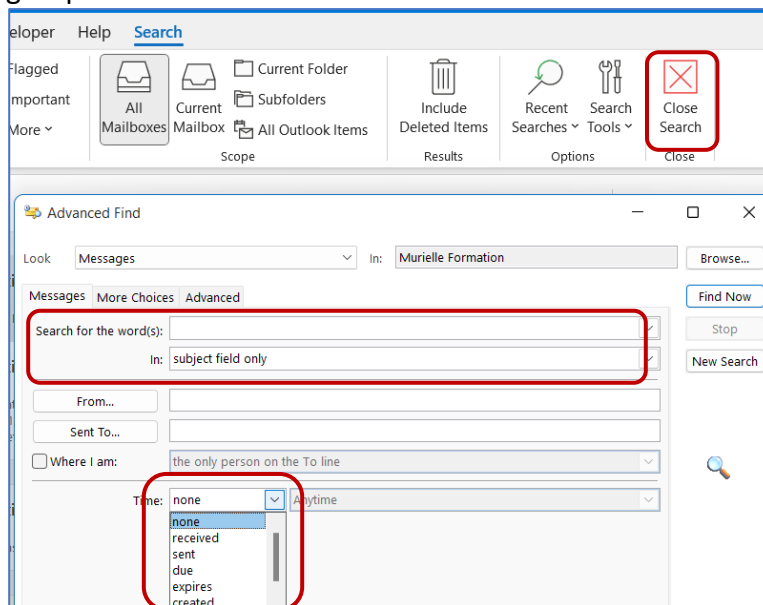
Example: **Has Attachments OR Flagged OR From**



- 8 To expand the search to include all **folders**, click **All Mailboxes** or **All Outlook Items**.



- 9 For more specific searches, use **Search Tools**, located in the **Search** tab, **Options** group



- Search in "Subject field and message body"
- Search in "Time"

- 10 Close the search when you have finished.

## → People

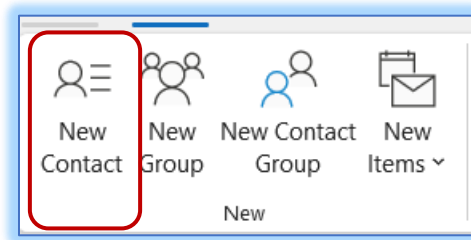
**People** is the name given to the people, and companies, who make up your professional and personal contacts. The person you add as a contact is entirely discretionary and the only restrictions that may apply to what you can or cannot add are the limits that you or your company impose. Your company, for example, may have rules about matching certain external email addresses.

### Create a contact.

A contact can be a simple name followed by an email address, or you can include detailed information such as a mailing address, phone numbers, a photo, and a birthday. Your contacts appear under the People option in the Quick Access Bar.



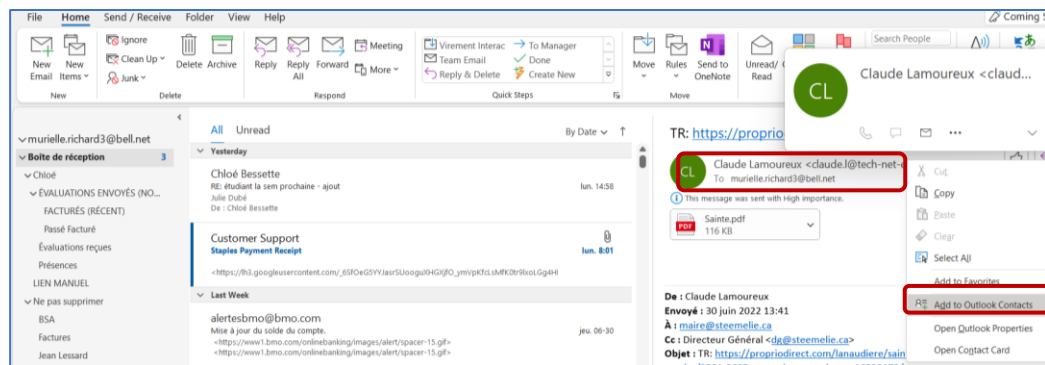
- In People, select **New Contact**.



- Keyboard shortcut: Press **Ctrl + Shift + C**.

OR

- From a received message, click the message
- Click on the email address received
- Right-click Add to Outlook Contacts



- Enter all information, name, email, telephone, etc.

- Do not forget to Save and close

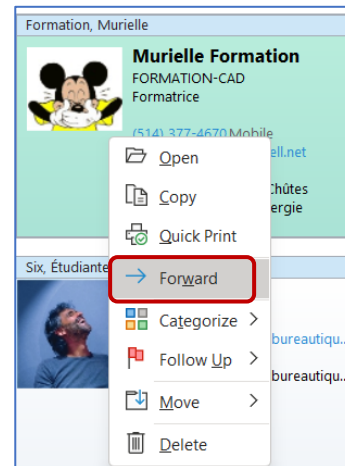
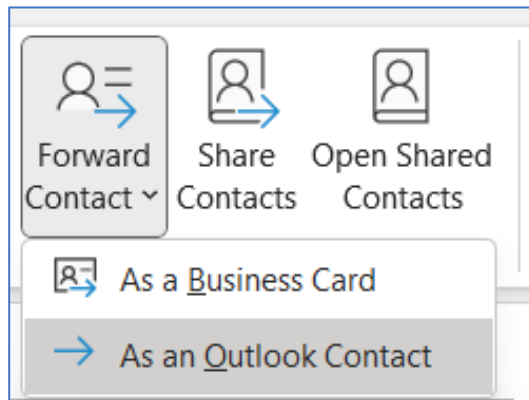
## Modify a contact.

- Open the contact
- Add a photo if necessary
- Double click on the card if you wish to change color or font and style.



## Forward a contact.

- 1 Select one or more contacts to transfer.
- 2 From the **People** tab, **share** group.



- 3 Click **Forward Contact**
- 4 Type the recipient's address.
- 5 Or right-click: Forward contact  
The person who receives your message will only have to double-click on the contact
- 6 Apply changes as needed and clickz on **save and close**

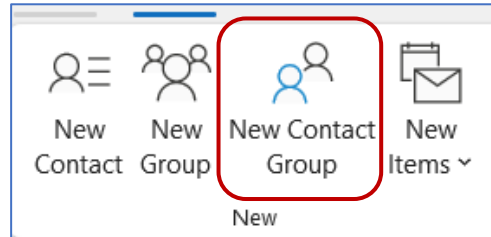


See the different kinds of display in contacts.

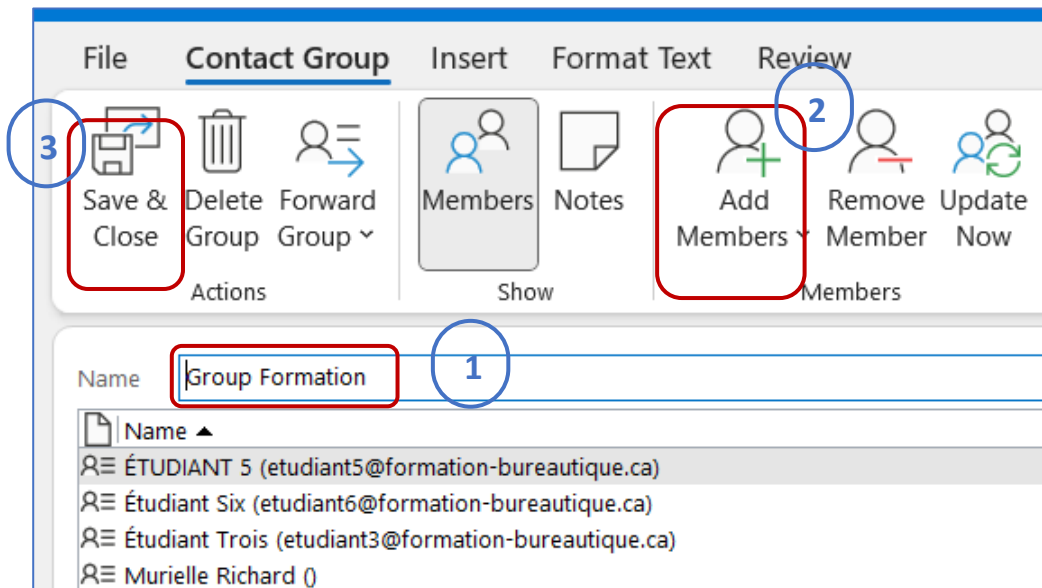
## Contact Group - Distribution List

A contact **group** also called a "**Distribution List**" to send an email to several people without having to add each name each time you want to send them an email.

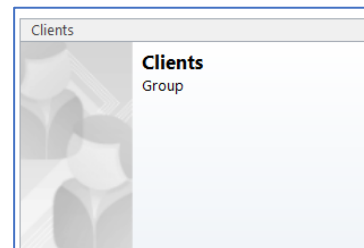
### Create distribution lists (or contact groups)



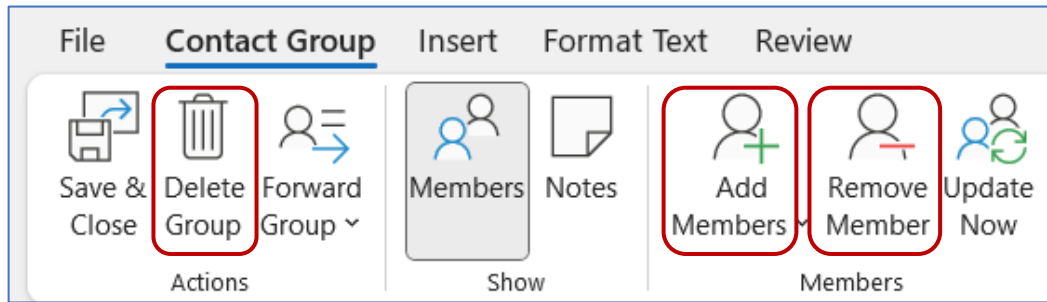
- 1 In the **Name** box, type the name of the new contact group.
- 2 Click the **Add Members** button to add members from any entry in your address book or contact.
- 3 Click **Save and Close** to save the new contact group.



- 4 The name of the distribution list (Contact Group) is displayed in bold relative to the other entries in the Contacts folder. The group ► View is also easier to spot among regular contacts.



## Add - Remove member – delete group.



- 5 To add a member or remove a member.
- 6 Just open the **contact** group and click **add** or **remove** member.
- 7 You can also **Delete the group** from the contacts.

## → Calendar

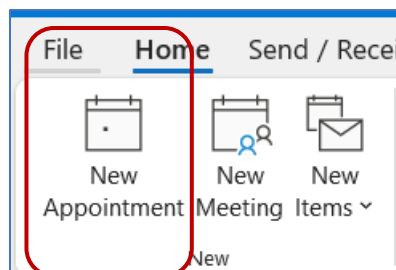
Appointments and meetings are important aspects of your personal and professional life. Your calendar is the ideal tool to manage these two types of items. Outlook also allows you to set reminders and categories for scheduled events.

### Create a calendar appointment.



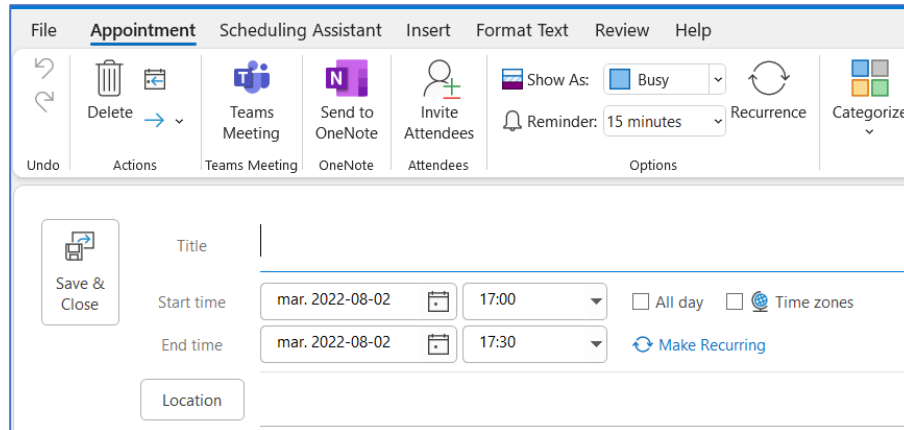
In Outlook, appointments are not to be confused with meetings. Appointments are activities for which you schedule time in your calendar. They do not imply invitations from others, or reservations of resources, such as a conference room or equipment.

- In a **Calendar** folder, select **New Appointment**. You can also right-click a time block in the calendar grid and select **New Appointment**.



- Keyboard shortcut: Press **Ctrl + Shift + A**.

- Tape the "Title"
- Choose the date and time Start – End
- Location if need



- Categorize
- Save & Close
- See how to move - copy an appointment

## Configure a recurring event.

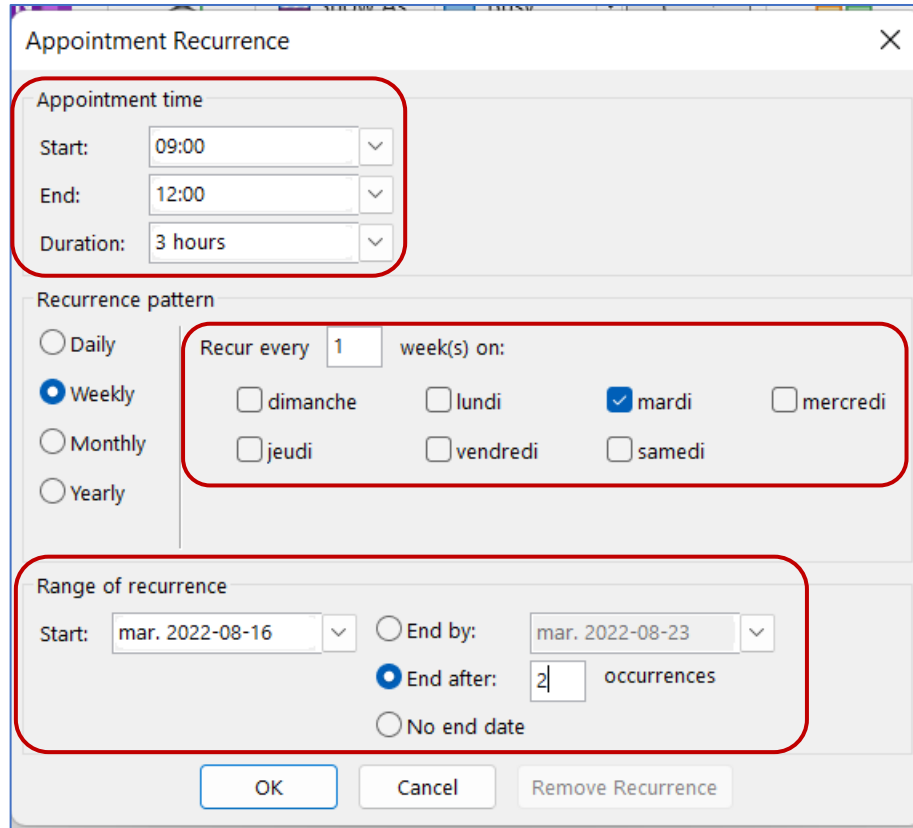
You can configure events. Events can have a specific start and end time or be marked as full-day events.

## Create an event.

- In your calendar, select the day on which you want your event to occur or select **New Appointment**.
- Enter the name of the event, choose the start time and end time of the event, enter the location, and set a reminder time.
- Categorize it as needed
- Click Make Recurring
- In the **Appointment Recurrence** window, determine whether the occurrence will be **Daily** or **Weekly** or **Monthly** or **Annual**
- Check the day(s) of the week





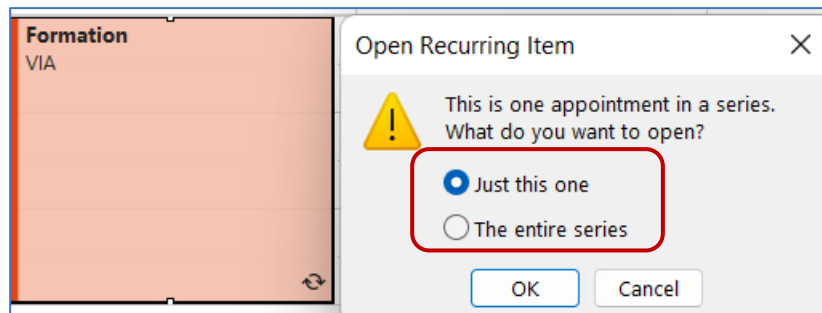


The 'Appointment Recurrence' dialog box is shown with three sections highlighted by red boxes:

- Appointment time:** Start: 09:00, End: 12:00, Duration: 3 hours.
- Recurrence pattern:** Recur every 1 week(s) on:
  - ☐ dimanche
  - ☐ lundi
  - ☒ mardi
  - ☐ mercredi
  - ☐ jeudi
  - ☐ vendredi
  - ☐ samedi
- Range of recurrence:**
  - Start: mar. 2022-08-16
  - ☐ End by: mar. 2022-08-23
  - ☒ End after: 2 occurrences
  - ☐ No end date

Buttons at the bottom: OK, Cancel, Remove Recurrence.

- In Recurrence range, check or type the dates **Start – End** or **End after X occurrences** or **No end date**.



The 'Open Recurring Item' dialog box is shown with a red box highlighting the options:

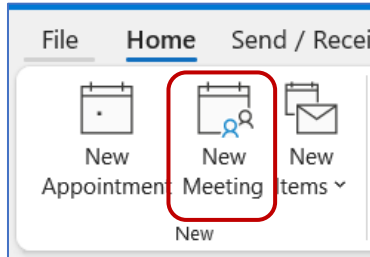
- ☒ Just this one
- ☐ The entire series

Buttons at the bottom: OK, Cancel.

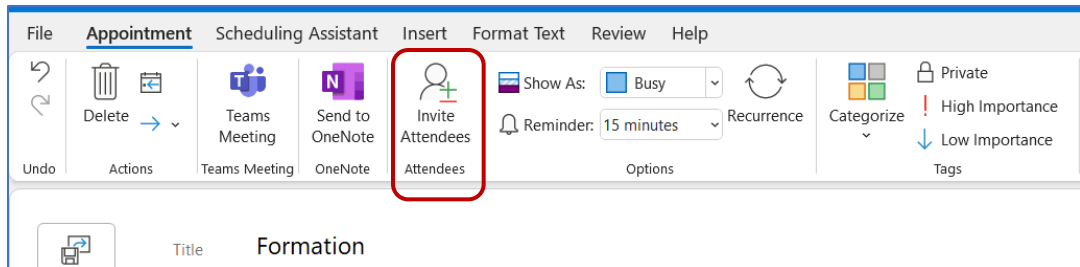
- To modify all occurrences or only one
- Double-click in the instance to open it.
- Check in Just this one or The entire series.

## Schedule a meeting

In Outlook, a meeting includes other people and can include resources, such as conference rooms. You'll have answers to your meeting requests in your inbox.

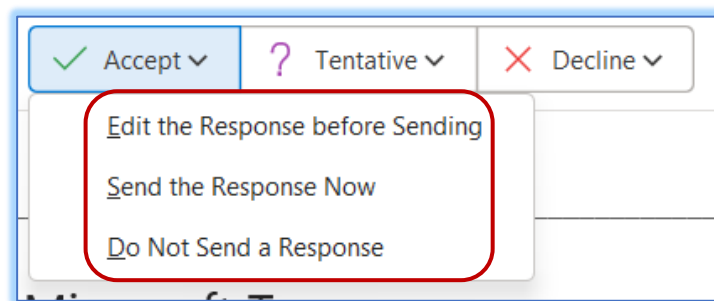


- In a **Calendar** folder, select **New Meeting**.
- Keyboard shortcut: Press **Ctrl + Shift + Q**.
- If you completed the appointment and forgot to click **New Meeting**, you can click **Invite** from the **Participants** group



## Accept or decline an invitation

When you invite participants to a meeting or meeting, the recipient will receive the message with the option: **Accept** or **Decline** or **Propose New Time**.



By accepting or refusing, he or she may **Edit the Response before Sending**, **Send the Response Now** or **Do Not Send a Response**.

The advantages of doing so is that the invitation is automatically found in the guest calendar.

## Follow-up of invitations

When you invite multiple participants to a meeting, it's important to be able to manage who accepted or declined the invitation.

- From your calendar, **open your invitation**
- Click in the **"Tracking"** tab

File Meeting Scheduling Assistant Tracking Insert Format Text Review Help

The following responses to this meeting have been received:

	Name	Attendance	Response
<input checked="" type="checkbox"/>	Étudiant Trois	Meeting Organizer	None
<input checked="" type="checkbox"/>	Murielle Formation	Required Attendee	None
<input checked="" type="checkbox"/>	Étudiant Cinq	Required Attendee	Accepted
<input checked="" type="checkbox"/>	Étudiant Six	Required Attendee	Accepted

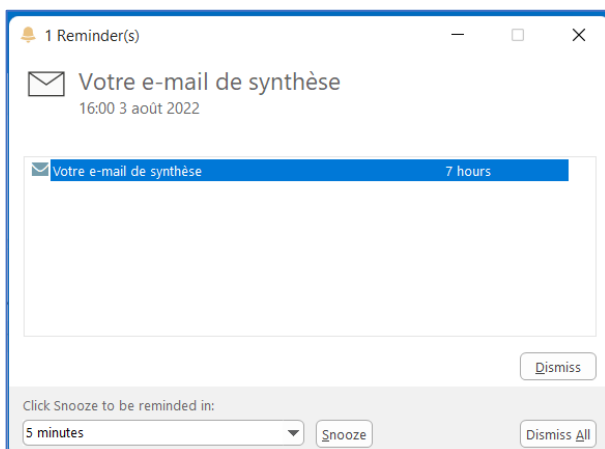
- The follow-up window displays participants' **responses**.

## ➔ Set a reminder.

For a visual reminder and if necessary, audible reminder of the actions to be carried out with a **message**, choose the option of follow ups.

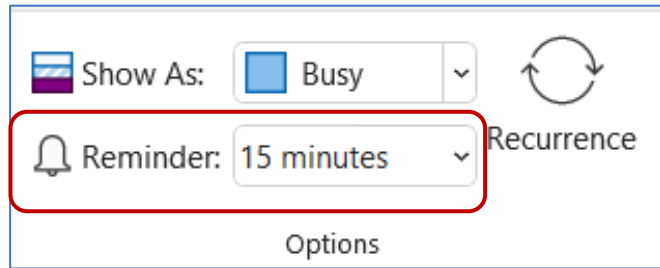


Reminders appear in an alert window to prevent you from missing an important deadline. You can set or delete reminders for virtually any item in Outlook, including **emails, appointments, contacts, and tasks**.



## For appointments or meetings

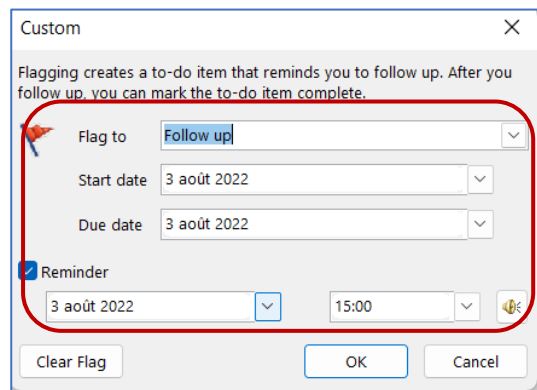
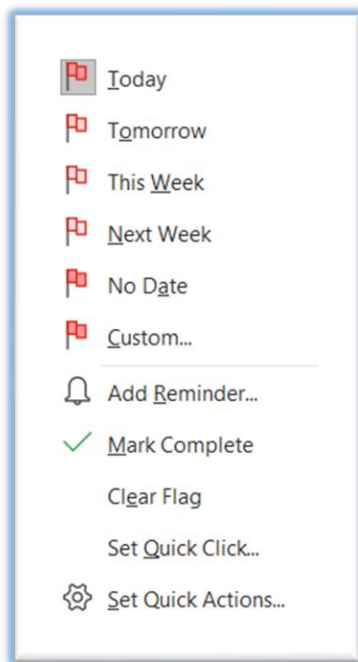
- Open an **appointment** or **meeting**, and then in the Reminder list box, specify how long before the appointment or meeting the reminder should appear.



- To disable a reminder, select: **"None"**.

## For email, contacts, and tasks

You can quickly mark emails as task items by using reminders. Thus, the message appears in the tasks list and in the Tasks folder, but a reminder is not automatically added. Right-click in the message list to add a reminder. Or, if the message is open, select **"Tracking"**, **"Add Reminder"**.

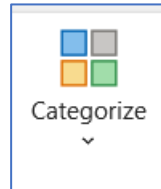


## ➔ Sort by color categories

As with reminders, categories will be useful for **messages, calendar, contacts, and tasks**.

Use Outlook Color Categories on your items, for grouping, tracking, for a fast visual organization, and therefore more efficient, of your projects.

Be careful, however, to think carefully about your different categories, because all your Outlook items use the same color categories. They must therefore correspond as much to an email, a meeting, a contact, a note, or a task.



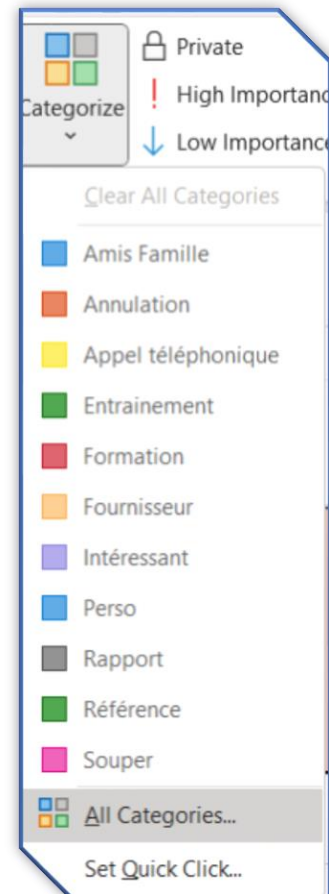
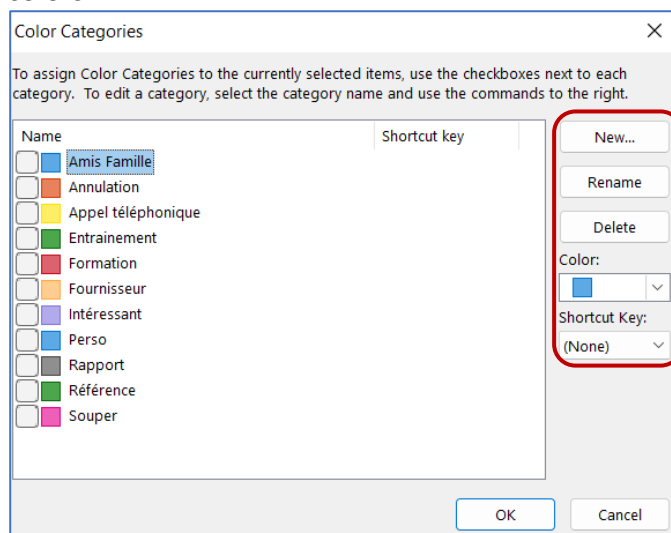
Outlook also allows you to set a Quick Click category by default to assign a message (or other item with a List view) your main category in the blink of an eye.

Here's an example:

- In the calendar, open an **appointment**, Click in the Appointment tab, in the **Tags** group.
- Click in **Categorize** and click in one of the categories

Add, rename, or delete a category.

- Click All **Categories**.
- You can create up to 25 categories using different colors.
- You can delete them, rename them, and change the colors.



## ➔ Export contact list

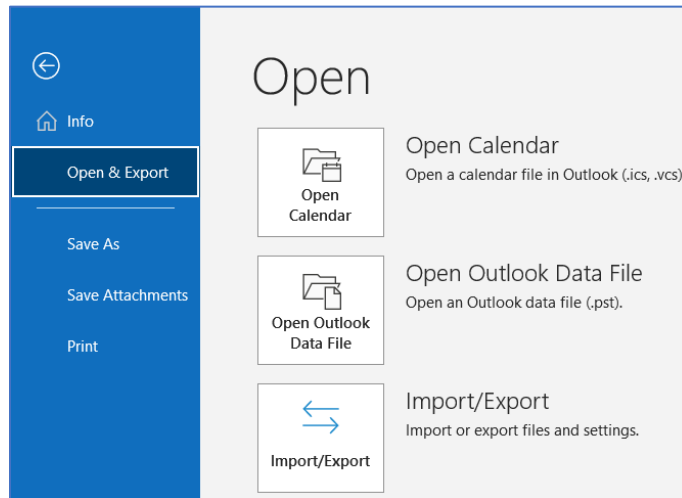
It is recommended to save a copy of the contacts. You can save to a ".pst" file of your contacts to possibly drop them into a new computer. You can export using the option: **Comma-separated values**. This option would allow you to export to EXCEL.

**We will perform the export by a file (.pst)**

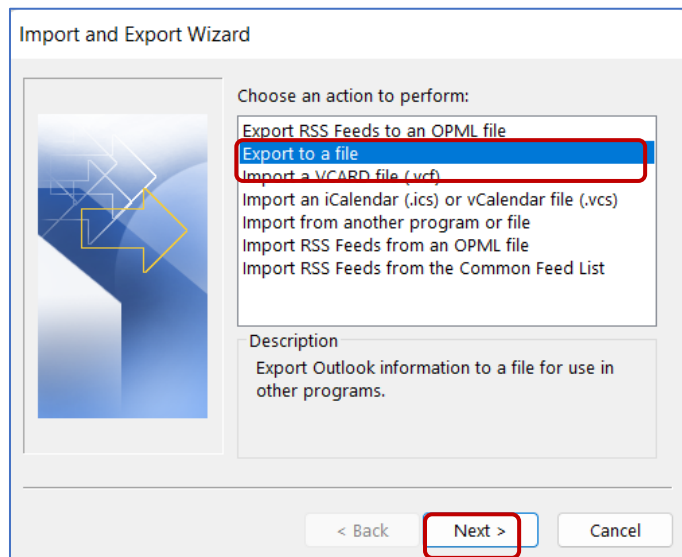
### Export contacts, messages, calendar, notes

You can export your contacts or incoming and outgoing messages, calendar, and notes. The procedure to follow is the same method for all. We will demonstrate with the contacts.

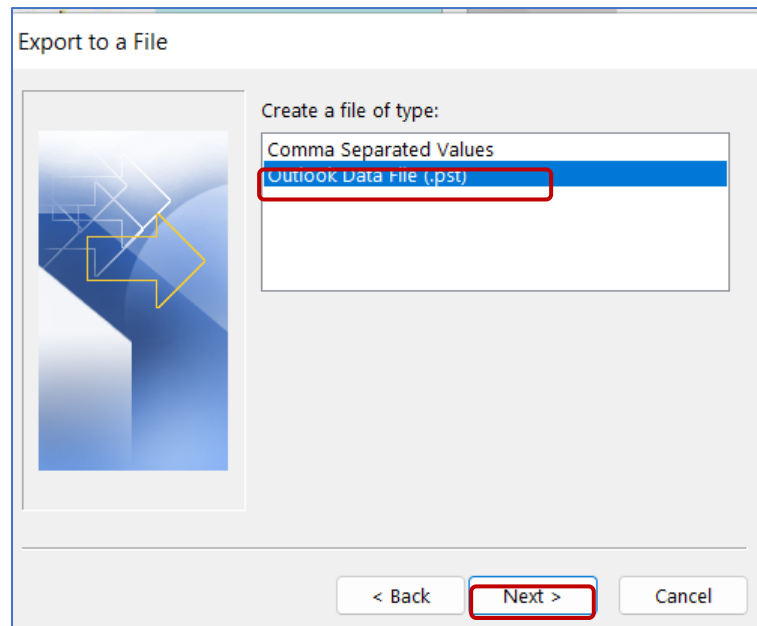
- Click "Import/Export".



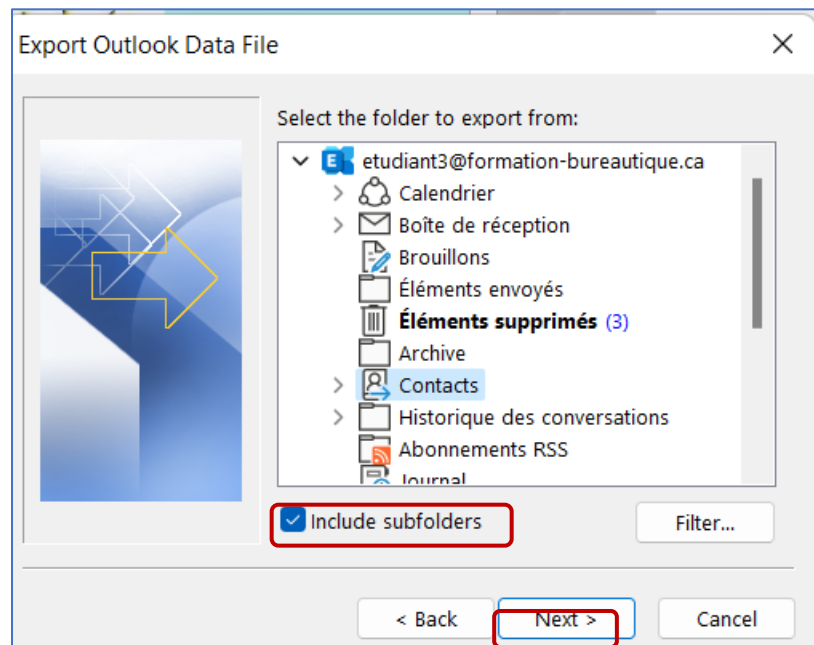
- In the Import and Export Wizard, select Export to a File
- Choose **Export to a file** and then click **Next**



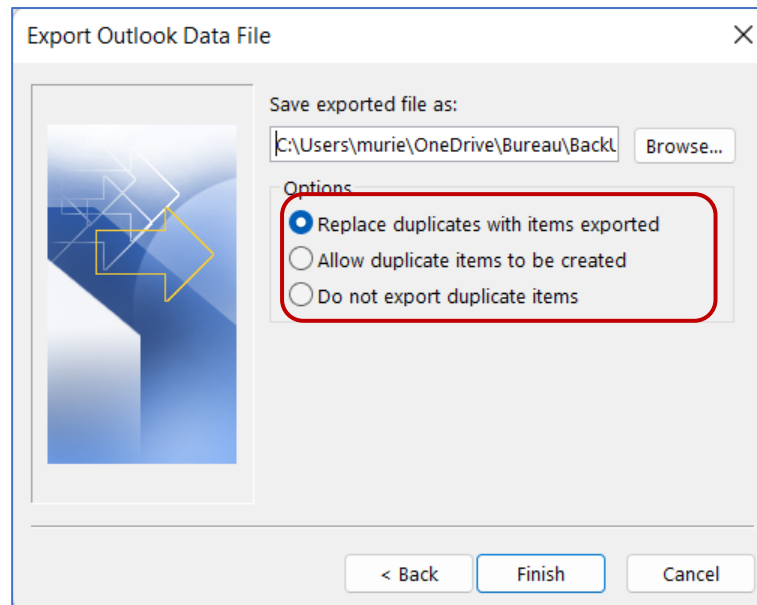
- Click Outlook Data File (.pst)



- Make sure you're in Contacts
- Don't forget to checkmark in **Include subfolders** as needed
- In **Export the contents of the selected folder**, choose the location and name of the file to be backed up.



- Check as needed in **Options** regarding **Duplicates**



- Select **Finish** to start the export process.
- You can add a password, which is optional.



You can export your incoming and outgoing messages, calendar, and notes using the same method

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## ↪ Import your contacts.

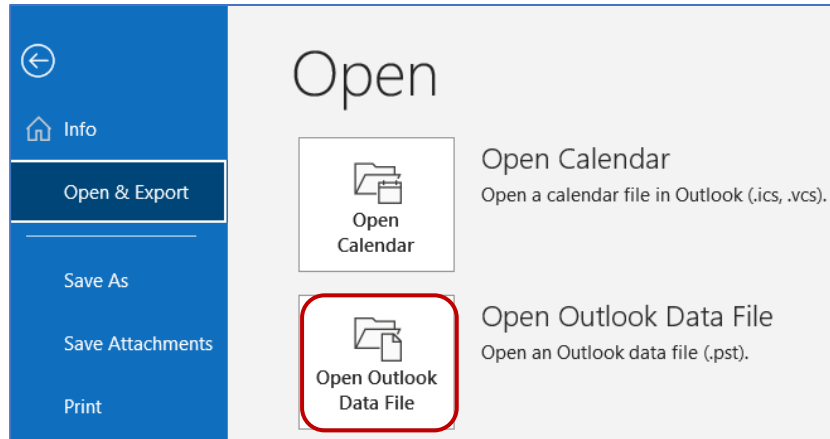
---

Open the FILE (.pst) grouping your contacts.



- Open Outlook, click File, "**Open and Export**",
- Click "Import/Export".
- In the Import and Export Wizard, select **Open Outlook Data File**





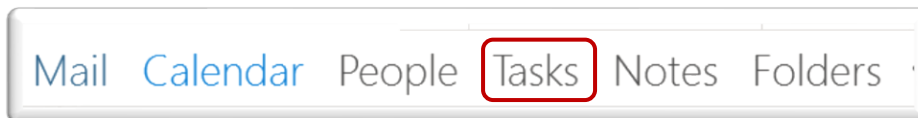
- Navigate to the location where you saved the **.pst** and open it.
- Make sure your contacts appear in Outlook



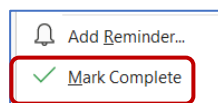
## Tasks

### Create a task.

Many users keep to-do lists, either on paper, in a spreadsheet, or on both paper and electronic media. In Outlook, you can merge multiple lists into one, receive reminders, and track tasks.





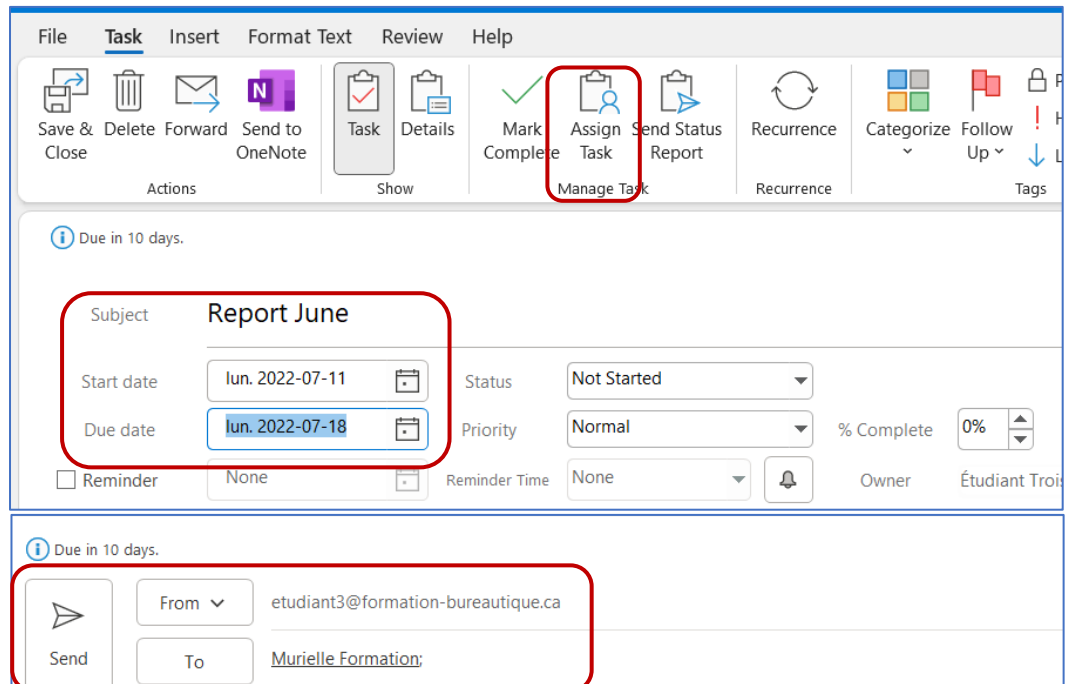
1. Open Outlook. On the **Home** tab, select group **New**, and then select **New Items**. Or **New Task** from **Task in Navigation**.
2. Select **Task**, fill out the task form, and then select **Save and Close**.
  - Keyboard shortcut: Press **Ctrl + Shift + K**.
  - When the task is **complete**, right click, **Mark Complete**.



## Assign a task.

You are too overwhelmed or have other obligations, delegate some of your tasks by assigning them to your colleagues or employees.

1. Select  in the quick access bar or **Tasks** on the navigation bar.
2. Do one of the following:
  - Select  on the ribbon or press **Ctrl + Shift + K** to create a task.
  - OR**
  - **Open** an existing task.
3. Select **Assign Task**.
4. In the Task form, do the following:
  - In the **To** box, enter a name or email address.
  - Add an **Object**, select a **Start Date** and **Due Date**, and set the **Status** and **Priority** as needed.
  - Select or clear the default selection of check boxes Keep an updated copy of the task in my task list and send me a status report when the task is complete.
  - If necessary, type a message in the content block under the check boxes.



The screenshot shows the Microsoft Task form interface. The 'Task' ribbon is active. The 'Assign Task' button is highlighted with a red box. Below, the task details form is shown. The 'Subject' field contains 'Report June'. The 'Start date' is 'lun. 2022-07-11' and the 'Due date' is 'lun. 2022-07-18', both highlighted with a red box. The 'Status' is 'Not Started' and 'Priority' is 'Normal'. The 'To' field contains 'etudiant3@formation-bureautique.ca' and the 'From' field contains 'Murielle Formation', both highlighted with a red box.

- If you want the task to repeat, select **Recurrence** on the ribbon, select the options that you want in the Task Recurrence dialog box, and then click **OK**.
- Select **Send**.

## Accept or decline an assigned task.

When a task is created and assigned to you, it appears in your Inbox.

✓ Accept ✗ Decline

- In the reading pane, select **Accept** or **Decline**.

OR

- Open the task, select **Accept** or **Decline** from the ribbon, and whichever option you choose, select **Edit Reply Before Sending** or **Send Reply Now**, and then click **OK**.
- Notice that accepted tasks appear in your Outlook task list.

If you open a task, you can **reply**, **reply to all**, or **forward** to the person who assigned the task to you, as appropriate. You can also include a comment in the message block.


**If you are starting the task and wish to notify your manager that it is in progress but not completed:**

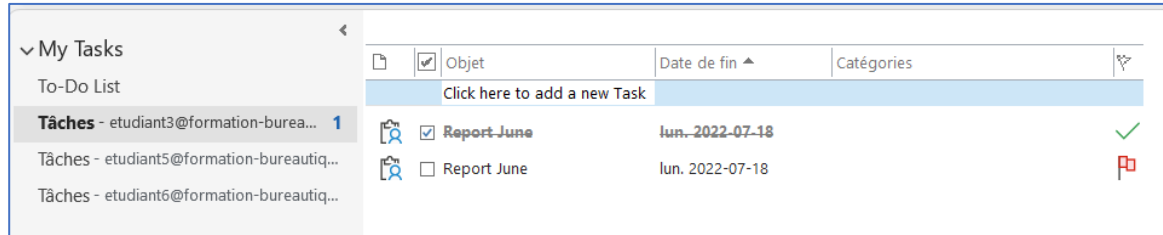
- Open the task, check the percentage already done and **Send report**

The screenshot shows the Outlook 'Task' ribbon with the following options: Save & Close, Delete, Send to OneNote, Task, Details, Decline, Reply, Reply All, Forward, Mark Complete, Assign Task, Send Status Report (highlighted), Categorize, Follow Up, and Tags. Below the ribbon, the task details for 'Report June' are visible. The start date is 'lun. 2022-07-11' and the due date is 'lun. 2022-07-18'. The status is 'In Progress', priority is 'Normal', and the completion percentage is '50%'. The owner is listed as 'Étudiant Cinq'.

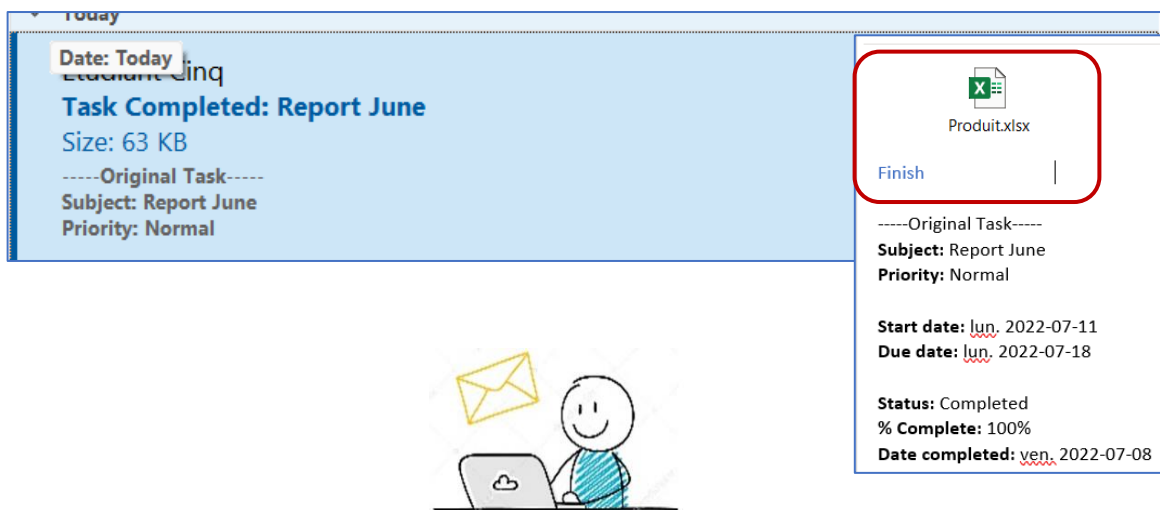
- When you have finished the work, put **100%** in **% Completed**
- You can even insert a file into the message to be sent.
- This will appear as **Completed** to the person who assigned you this task.

## View a task.

1. Open Outlook, and then on the Quick Access Toolbar, select .
2. In your **Task List** or **My Tasks**, double-click an item to display the full form.



3. Email will be received also with confirmation "Task Completed"



## A LITTLE ADVICE

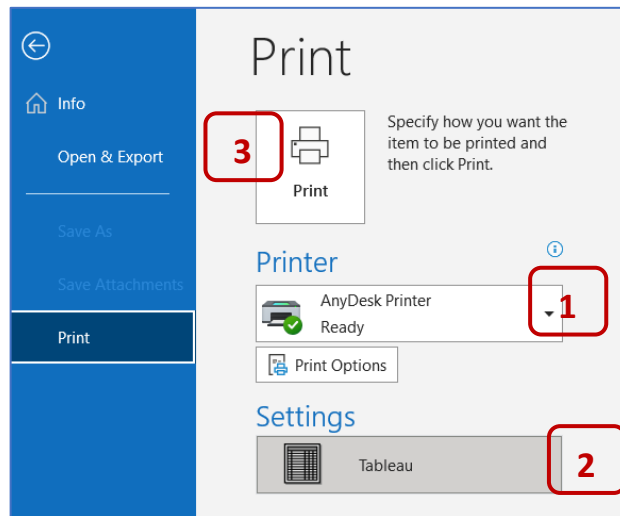
*If you assign a recurring task, a copy of that task remains in your task list but is never updated. If you select the **Send me a status report when this task is complete** check box, you receive a status report for each completed occurrence of the task.*

*Outlook allows you to track the progress of a task assigned to a single person. If you want multiple people to work on a task, divide the task into subtasks or assign the task individually. For example, to track a report to be written by three authors, create three separate tasks, and then assign each individual task to the appropriate author.*

## ➔ Print an email, contact, or calendar item or a note.

In Outlook, you can print individual items (such as email, contacts, or calendar items) or larger views (such as calendars, address books, or email folder content lists).

1. Select an Outlook item or folder that you want to print.
2. Select **File, Print**.



1. Choose printer.
2. Change printing options as needed.
3. Send to print

## ➔ To Do

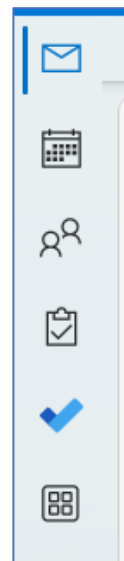
**To Do** is a cloud-based task management application.

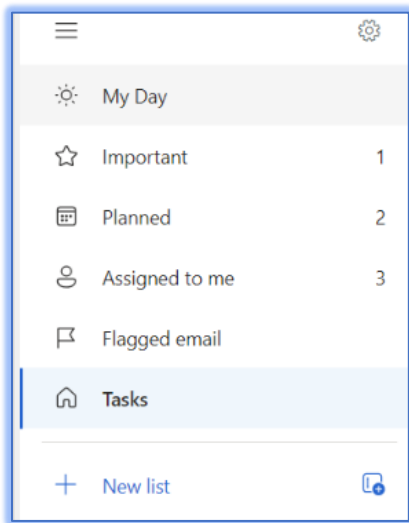


This allows us to manage tasks from a smartphone, tablet, and computer.

### Understanding Display in To Do?

- Tasks are ranked better, they are grouped together
- Tasks can be organized by lists. You can easily manage tasks by project.



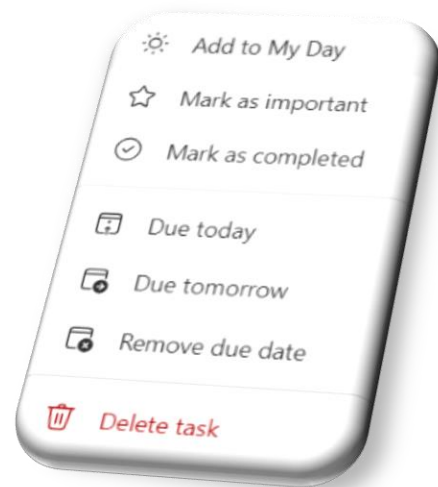


### Flag

A message that has been flagged can also be located in "**My Day**"

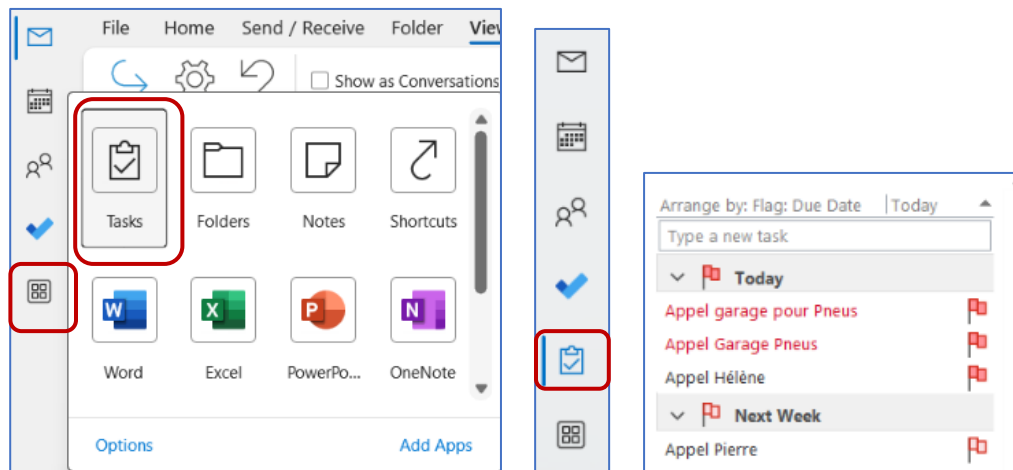
In "**To Do**", an item can be marked as "**Scheduled**" and also marked as "**Important**"

We can change the important or due date at any time or delete with the right mouse button



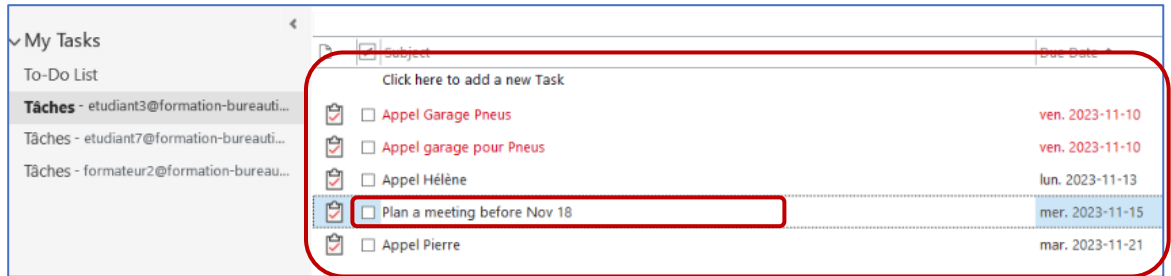
## Normal Task

- To get "Normal Task", click in "**More APPS**"
- Then choose "**Tasks**"

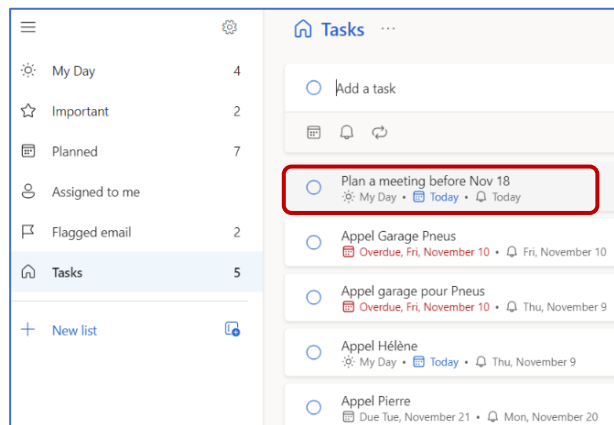


The whole thing is a matter of clearer display, here is an example:

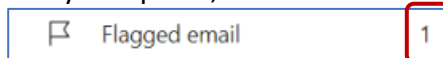
- Click on "Tasks"
- Observe: "Plan a meeting before Nov 18 "



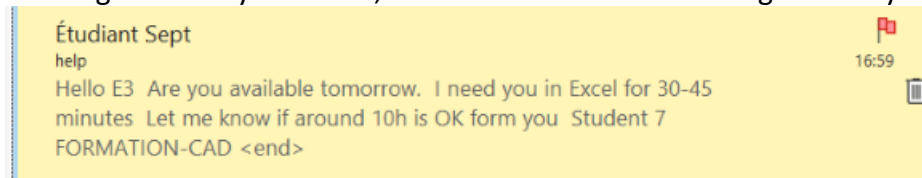
## Task in To Do



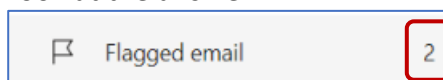
- Now look at the number of "Flagged Email " that you have
- In my computer, the answer is "1 flag "

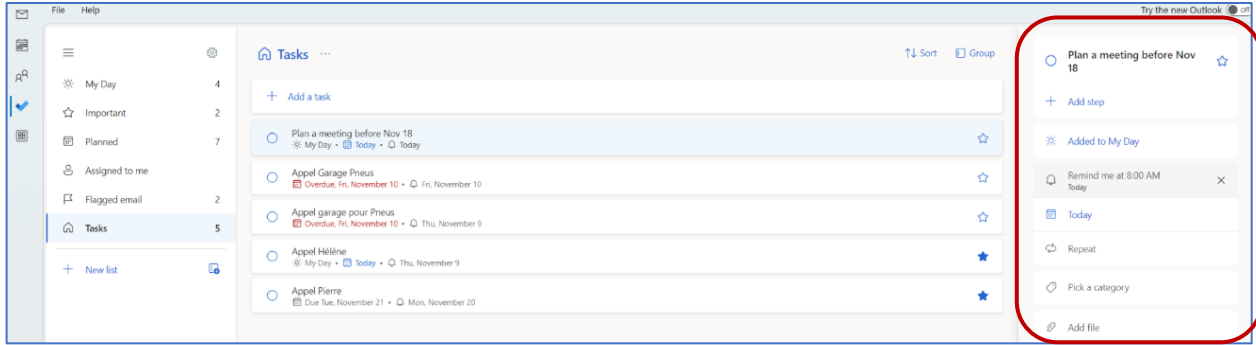


- Please go back to your Email, and mark an Email with a flag for today



- Go back to "To Do "
- Look at the answer:





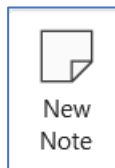
## Notes

Notes are the electronic equivalent of adhesive papers that you stick all over your screen or desk. Use the notes to write down your questions, ideas, reminders, and anything else you could write down on paper. You can leave the notes open on the screen while you work. This is handy when you use notes to save information that you would need later, such as instructions or text that you would like to reuse in other items or documents.

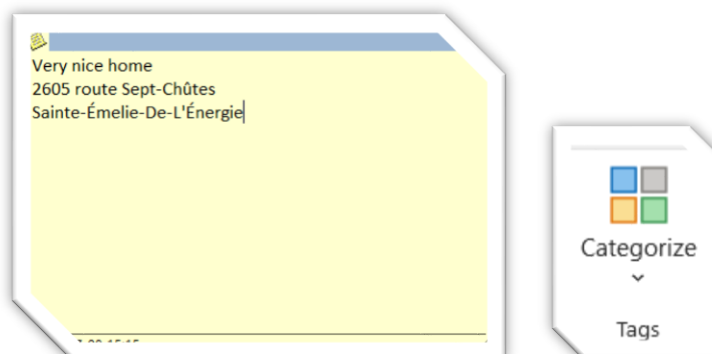
Mail Calendar People Tasks **Notes** Folders

### Create a note.


- In Notes, on the **Home** tab of the group **New**, click **New Note**.



- Type the text of the note. The note is saved automatically.
- To close, click the icon in the upper-left corner of the window or the **X** on the right





- Keyboard shortcut: Press Ctrl + Shift + N.
- Resize as needed (Lower right corner) 
- Categorize it as needed

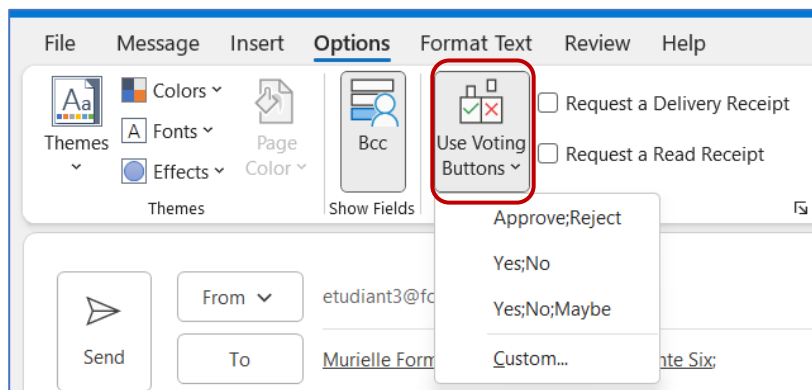
## ➔ Voting buttons

Use voting buttons to create or respond to polls.

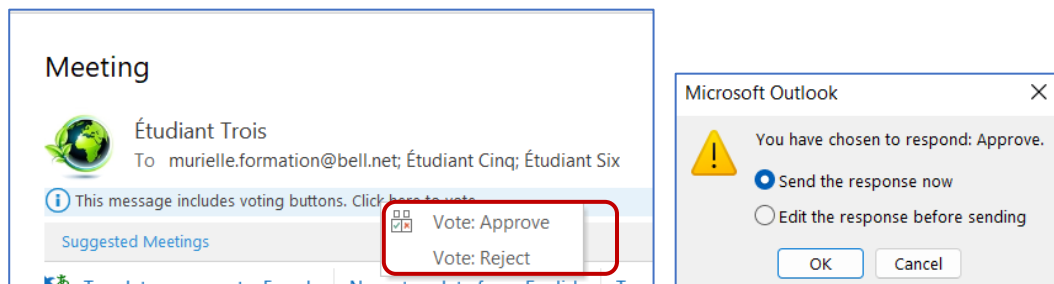
Your buttons are a great way to survey people, especially large groups of people. A Microsoft Exchange Server account is required to send and respond to voting buttons.

In some of your emails for quick and professional surveys.

1. Create a **new message**.
2. Tap "**Options**" Group ➔ "**Tracking**" "**Use voting buttons**"



3. People will receive you email and will "Approve" or "Reject"

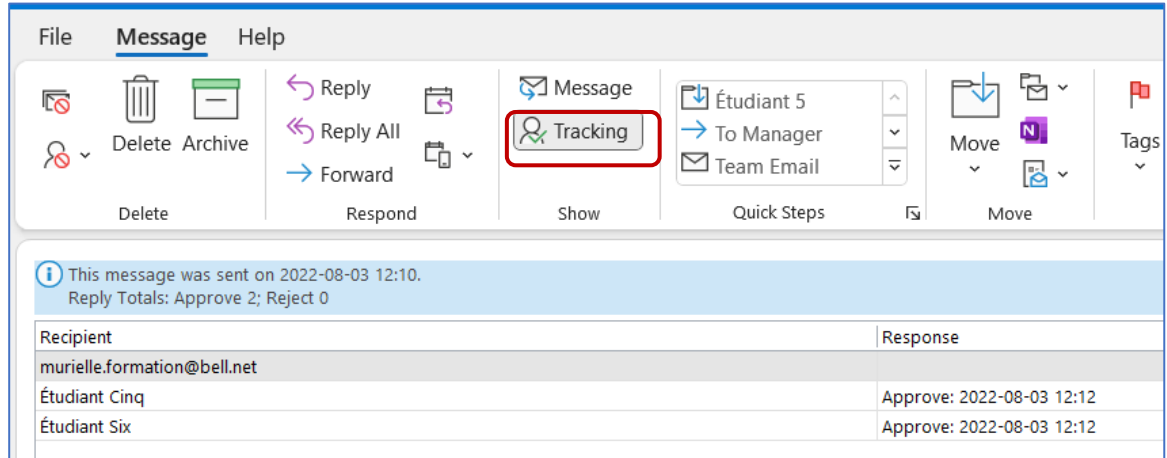


You will receive confirmation of "**Approve**" or "**Reject**" from them

## Track and print survey results.

When you create and send a survey to others, it can be helpful to track and print the results. You can either quickly copy the voting results to a blank Word document or copy them to Excel to compile the data.

1. In the Sent Items folder, open the email message that you sent that contains the survey.



2. Click **Tracking** of the **Message** Tab Group ► "Show".
3. Select your answers and **copy** or **CTRL + C**
4. Open **EXCEL** or **WORD** and **paste** or **CTRL + V**

	A	B
1	Étudiant Cinq	Approve: 2022-08-03 12:12
2	Étudiant Six	Approve: 2022-08-03 12:12



The Track button does not appear until a vote has been returned.

5. You can now analyze your data.

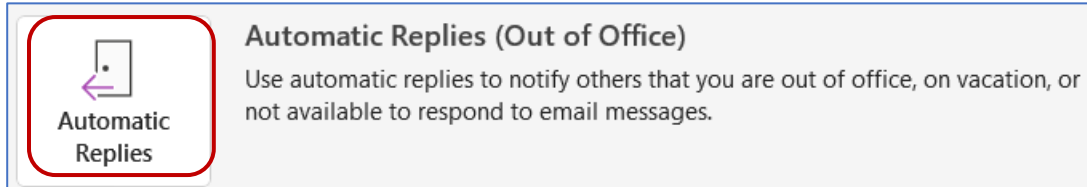
## ➔ Absence Manager

There are two methods available to send automatic out-of-office replies. The method to use depends on the type of email account you have.

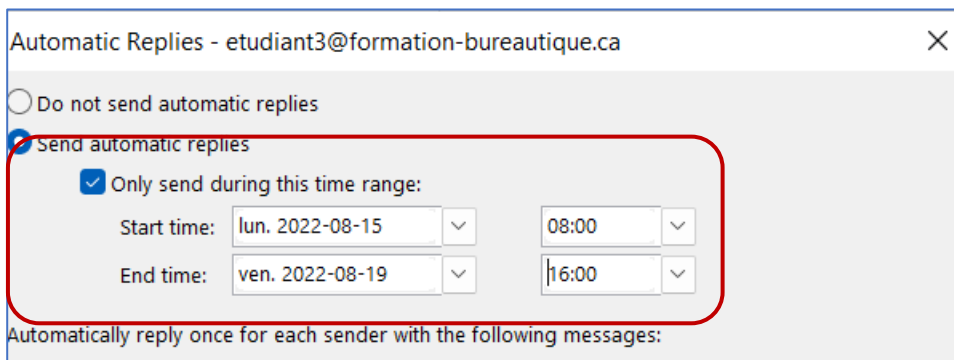
Click **File**, and then select the image for your version of Outlook.

### Set up an automatic reply.

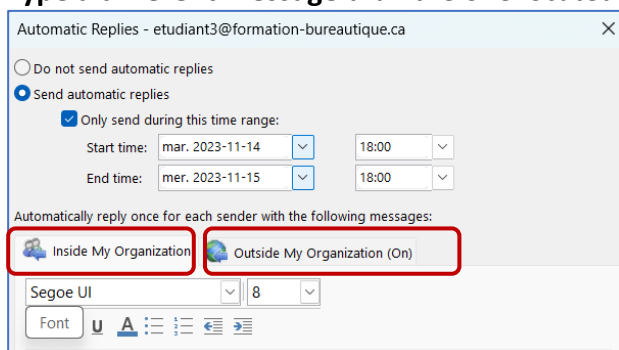
1. Select File, **Automatic Replies**.



2. In the **Automatic Replies** dialog box, select **Send Automatic Replies**.
3. Set a date range for your automatic replies.



4. In the **Inside My Organization** tab
  - Type the answer you want to send to your colleagues when you are away from the office.
5. On the **Outside My Organization** tab (**Enabled**)
  - Click the Outside My Organization tab (Enabled)
  - **Type a different message** than the one located in Inside my organization



6. Click **OK**



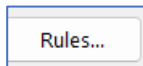
Often the message of absence is different from the one addressed to the people who work within your organization than the one who work outside your organization.

## Create a rule (Out of Office)

You can create one or more rules. Example:

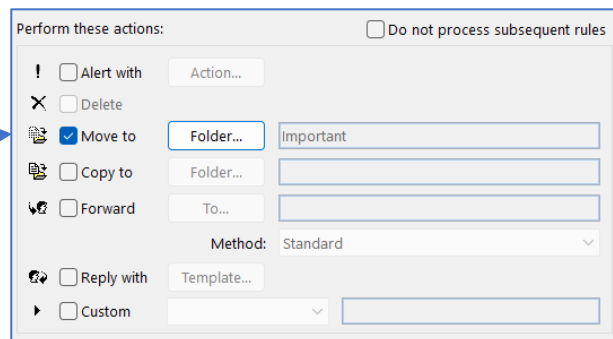
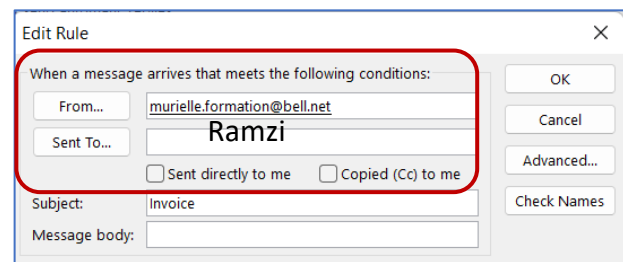
Your messages come from a particular person; the message must be sent to another person.

1. In the Automatic Replies window, click Rules, located in the left corner at the bottom of the window.



2. **"From..."** » Type the name of the person from whom the message comes.
3. **"Sent to..."**. Type the name of the person you want to send the message to.
4. You can create other rules, example:

- Alert with
- Delete
- Move to - **"Folder"**
- Copy to
- Forward



## Turn off automatic out-of-office responses.

When Outlook is configured to send automatic replies, a message appears under the ribbon with this information. Check **Do not send automatic reply** to turn off automatic out-of-office responses.

