

OUTLOOK 2016

# 3 Working with People

In this chapter, you will manage Outlook's People element, the electronic equivalent of a Rolodex® card file that used to be found on every desk. Outlook provides you with an address book in which to store your contacts. After you create them, you can always go back and edit or even delete contacts. Storing contacts in the Contacts list makes addressing messages much simpler than typing the addresses each time. And, the Contacts list can be sorted in numerous ways. You can search for and choose one or more recipients from the Contacts list to go into the header section of a message. In this chapter, you will also learn how to save time addressing messages to the same group of people over and over again by creating contact groups.

## LEARNING OBJECTIVES

- Explore the People views
- Work with contacts
- Use contact groups
- Use the People pane

## CHAPTER TIMING

- Concepts/Develop Your Skills: 1 hr 30 mins
- Self-Assessment: 15 mins
- Total: 1 hr 45 mins

## PROJECT: WORKING WITH PEOPLE

Ann Hitchcock feels pretty good now about using Outlook for email, so she is ready to learn how to work with the People element of Outlook. She will learn how to enter contacts in Outlook, send messages to contacts, create groups of contacts, manage contacts, and work with the People pane.

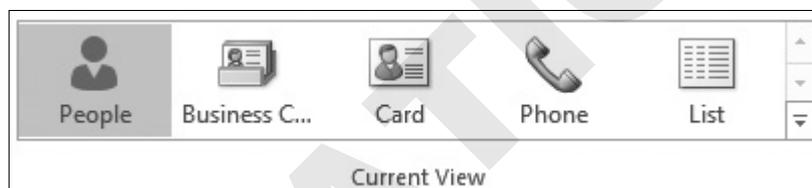
# Managing People in Outlook

Outlook offers several ways to display your contacts, or the people with whom you communicate. Don't be confused by the terminology here: Outlook calls the element where you store your contacts "people." The terms "contacts" and "people" are used somewhat interchangeably, so don't get caught off-guard.

You can save all contacts in the default Contacts folder, or you can create separate folders in which to store related contacts (such as work, school, and so forth). You can maintain varied amounts of information about different contacts in Outlook's Contacts list. For example, you may keep only Aunt Helen's email address, while, for a business client, you might want to store the company name, address, phone numbers, and email address. Contacts can be edited or deleted at any time in the People element. You can delete a contact as you delete any other item: Select it and tap **Delete**.

## The Contacts List

There are five standard ways to view your contacts: People, Business Card, Card, Phone, and List. You can also create your own view. Which view you choose is a personal preference. The view options are found in the Current View group on the Home and View tabs when the People element is selected. As your list of contacts grows, you can scroll through the list or use the Search Contacts box to find a particular contact. You will learn more about finding contacts later in this chapter.

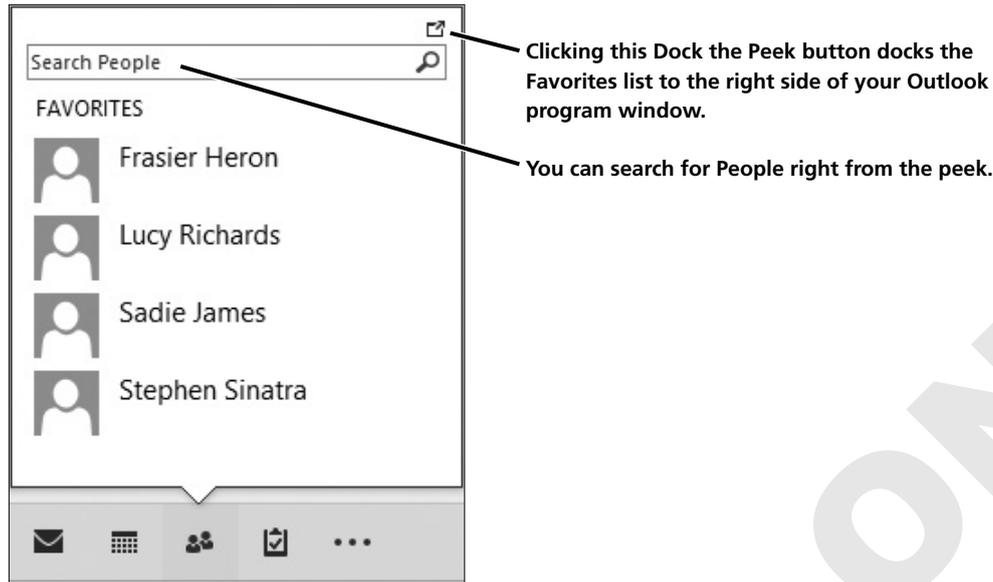


By default there are five standard views available in the People element of Outlook.

## Peek-a-Booing with People

One feature in Outlook allows you to "peek" at your list of favorite people when you are in other elements of Outlook.

When you peek at People in Outlook, you can choose to communicate with any of your favorite contacts; exactly how you can communicate is based on the information you have entered for the person. This feature also allows you to quickly view contact information while active in other elements of Outlook, such as email addresses. When you view a peek, you can choose to dock it on the right side of your window, thereby adding it to your workspace. You will learn how to mark people as your favorites later in this chapter.



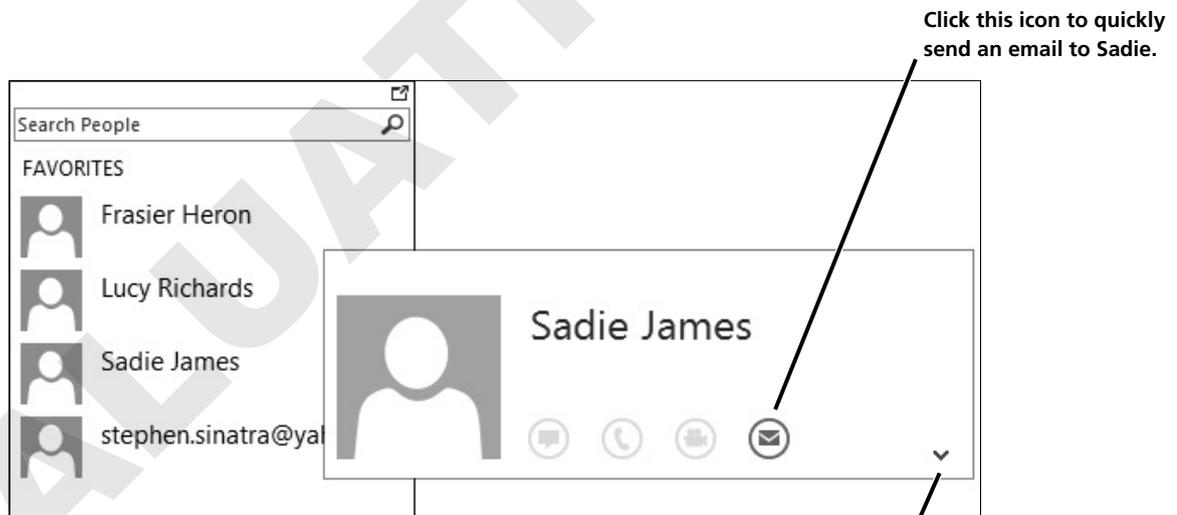
Clicking this Dock the Peek button docks the Favorites list to the right side of your Outlook program window.

You can search for People right from the peek.

When you move your mouse pointer over People on the Navigation bar, you can “peek” at your Favorites contacts.

### People Toolbar

When you hold your mouse pointer over a name in Outlook, a toolbar appears. This toolbar enables you to quickly chat, call, schedule a meeting, or send an email to the person shown in your Favorites list here. Use the icons along the bottom of the toolbar to perform the action.



Click this icon to quickly send an email to Sadie.

If you move your mouse pointer to rest over a favorite contact, a toolbar appears.

Click the drop-down arrow to open the People Card for Sadie.

## DEVELOP YOUR SKILLS OU3-D1

*Sometimes you need quick access to a phone number, address, or other contact information. In this exercise, you will use the peek feature to review contact information without leaving the message list.*



**You can complete this exercise “live” or via the online WebSim.**

1. Follow the step for your situation:
  - If using the WebSim: In your web browser, go to <http://labyrinthelab.com/2016/websim/OU3D1>.
  - If using Outlook “live”: Continue with step 2.
2. Hover your mouse pointer over the People link  in the lower-left part of the window.
3. Move your mouse pointer up the peek and hover it over *Sadie James* until the toolbar appears. If you aren't using the WebSim, hover your mouse pointer over any contact available. If no contacts are available, return to this exercise after assigning contacts to your Favorites (in the next exercise).
4. Click the **Send Email Message**  button on the Sadie James toolbar.
5. Close the Message window, choosing to not save changes.
6. Click the **People**  link in the Navigation bar to view the People element.
7. Choose **Home**→**Current View**→**Business Contact**  to change the view.
8. Choose **Home**→**Current View**→**Phone**  to change the view again.
9. Choose **Home**→**Current View**→**People**  to return to People view.

## Working with Contacts

When you create a contact, Outlook stores it in the Contacts folder of your Outlook data file. You will find it to be a time-saver to address your messages by selecting your contacts from People rather than typing them manually. The default format for storing the information is Last Name, First Name. This format is helpful because you then have an option to sort your list by either first or last name. You will learn more about sorting your contacts later in this chapter.

### Creating a Contact in People

You can create a contact in the Contacts window and store as much information as you want about the person. The more information you put in, the more you will be able to see when you “peek” and when you view your contacts in the People element, which can be quite helpful. For example, you may need to call someone but don't know the number. If you had entered the phone number in People, you could view it right there in front of you.

The Social Network connector no longer connects to Facebook, LinkedIn, or other networks because the interfaces could not be maintained. The add-in for Social Network 2016 may be installed, but it is not active. One thing to keep in mind is that people can be added only individually. While you may wish to add a bunch of contacts all at once, importing a contacts file is the only way to do so.

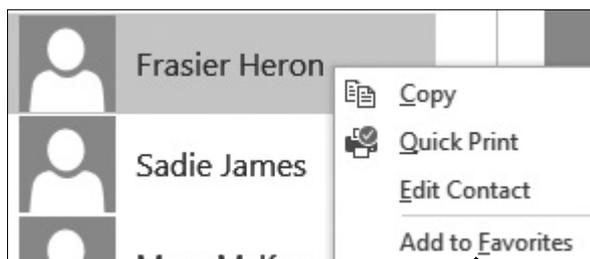
Note the fields available for you to populate when you create a new contact. You can choose the level of detail that you include in a contact record.

## Turning a Person Included on an Incoming Message into a Contact

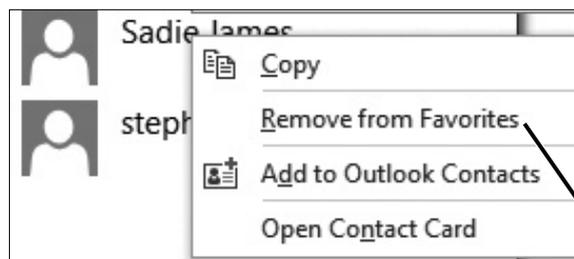
Another method of adding a contact is to right-click the email address of someone in the header on an incoming message and choose Add to Outlook Contacts. After you add it, a contact window opens automatically, giving you the opportunity to enter additional information.

## Making a Contact a Favorite

To turn a contact into a favorite so you can view it on the People peek, you simply right-click it and choose Add to Favorites from the options menu. To remove a contact, you must click the Dock the Peek button in the upper-right corner of the peek. Then, you can right-click on a contact and choose Remove from Favorites.



To add a contact to your favorites, right-click the contact from the People element and choose Add to Favorites.



To remove a contact from your favorites, you must click the Dock the Peek button in the upper-right corner of the peek. Then, you can right-click on a contact and choose Remove from Favorites.

## DEVELOP YOUR SKILLS OU3-D2

Outlook's address book is just a click away. In this exercise, you will add a new contact to Outlook and to your Favorites.



You can complete this exercise “live” or via the online WebSim.

- Follow the step for your situation:
  - If using the WebSim: In your web browser, go to <http://labyrinthlab.com/2016/websim/OU3D2>.
  - If using Outlook “live”: Continue with step 2.
- Choose **Home**→**New Items**→**Contact** .
- Follow these steps to create a new contact:

Full Name...	Mary McKay
Company	From Shelter to Home
Job title	Bookkeeper
File as	Mckay, Mary
Internet	
E-mail...	mary.mckay@mail.com
Display as	mary.mckay@mail.com
Phone numbers	
Business...	(503) 555-7856

- Type **Mary McKay** as the full name.
- Tap **[Tab]** and type **From Shelter to Home**.
- Tap **[Tab]** and type **Bookkeeper**.
- Click in the **E-mail** field, type **m**, and then choose Mary's email from the list.
- Click in the **Business Phone** field and type **503-555-7856**. (Outlook will add the parentheses.)

- Choose **Contact**→**Actions**→**Save & Close** .
- Click the **Mail**  link on the Navigation bar.
- Click **Inbox** in the Favorites list and then click the email from **Stephen Sinatra**.

7. Follow these steps to set up Stephen as a contact:

**A** Right-click **Stephen Sinatra** in the Reading pane.

**B** Choose **Add to Outlook Contacts** from the menu.

**C** Click the plus button next to Phone.

**D** Choose **Mobile**.

**E** Type **(503) 555-1741**.

**F** Click **Save** and then close the contact window.

8. Click the **People**  link in the **Navigation bar**.
9. Right-click **Frasier Heron** or another contact and then close the contact window and choose **Add to Favorites**.

## Editing Contacts

To edit information, you must first find the desired contact and open the associated window. You can either scroll to find the contact or perform a search. When you peek at the People element, a Search People box appears at the top of the peek. If you are in the People element, you will see a Search Contacts box at the top of the list of contacts. As you begin to type in either of these boxes, the Contacts list filters contacts to display the names that contain those letters.

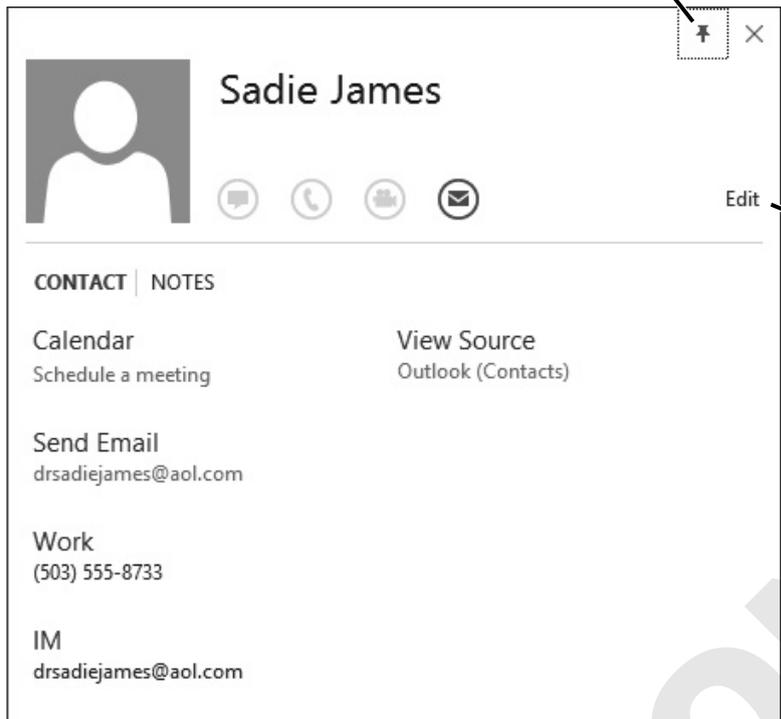
Another tool to aid you in locating a contact if you are in People, Business Card, or Card view is to click one of the letters along the left side of the Contact list to move to contacts that start with that letter.

## Viewing People Cards

The People Card helps you to keep track of all your contact information in one easy location and can be accessed from a variety of places throughout Outlook.

You can access a People Card by double-clicking a contact in People view or by clicking the drop-down arrow at the bottom-right corner of a contact toolbar. When you open a card from a contact toolbar, you have an option to “pin” it so it does not go away when you move on to another area of Outlook. If a People Card is opened from People view, it is opened in editing mode, and there is no pin icon. If you make a change and click Save or click Cancel, you will see the pin icon and can then pin the People Card.

When the card is pinned, the pin icon is vertical.



To pin the People Card, click the horizontal pin at the top right of the card.

If you wish to edit your contact information, you can click the Edit link.

**CONTACT | NOTES**

Calendar  
Schedule a meeting

View Source  
Outlook (Contacts)

Send Email  
drsadiejames@aol.com

Work  
(503) 555-8733

IM  
drsadiejames@aol.com

When the People Card is pinned, it will not “go away” when you move away from it in Outlook, and you can view it alongside or on top of other windows.

### DEVELOP YOUR SKILLS OU3-D3

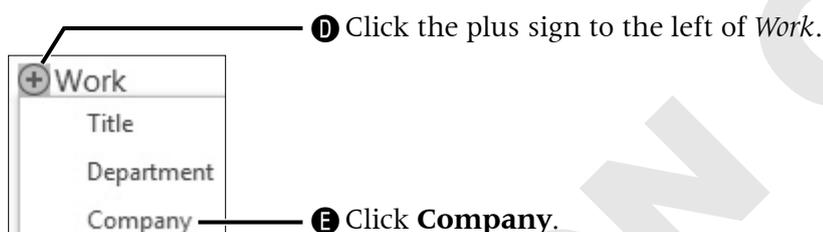
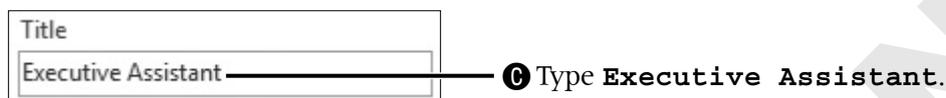
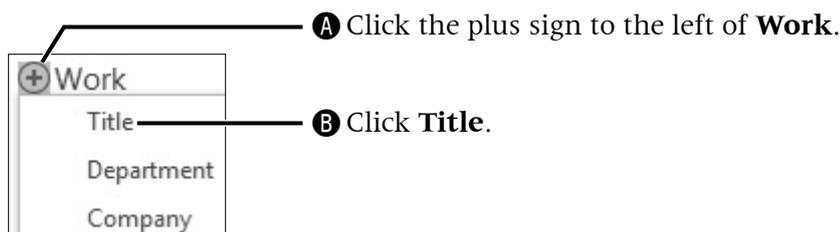
Sometimes you need to modify or add additional contact information. In this exercise, you will edit a People Card so it stores more detailed information.



**You can complete this exercise “live” or via the online WebSim.**

1. Follow the step for your situation:
  - If using the WebSim: In your web browser, go to <http://labyrinthlab.com/2016/websim/OU3D3>.
  - If using Outlook “live”: Continue with step 2.
2. Double-click **Stephen Sinatra** to open his People Card in edit mode.

3. Follow these steps to edit the contact:



4. Click the **Save** button.
5. Click the **pin**  at the top left of the People Card window.
6. Click the **Close**  button to close the window.

## Sorting the Contacts List

By default, the Contacts list is sorted alphabetically by last name; however, you may wish to have it sorted differently. For example, if you deal with a variety of companies, you may wish to sort your list by company name. Or, if you have stored all your contacts by first name first, you may wish to sort by first name. When you are viewing the list in Phone or List view, you can use column headers at the top of each column for sorting. The first click on a header sorts the list in ascending order, and the second click changes the sort to descending order. When you change the sort order, it remains in that order until you change it again—even if you close and reopen Outlook. You can also change the order in which the columns appear and the width of the columns. While we don't cover it in this book, be aware that you can also choose which columns to display in the Manage All Views window.

	FULL NAME	COMPANY	FILE AS ▲	BUSINESS PHONE	MOBILE PHONE	E-MAIL
Click here to add a new ...						
	Frasier Heron		Heron, Frasier	(503) 555-7989		frasier.heron@yahoo.com
	Sadie James		James, Sadie	(503) 555-8733		drsadiejames@aol.com
	Mary McKay	From Shelter to ...	McKay, Mary	(503) 555-7856		mary.mckay@mail.com
	Stephen Sinatra	From Shelter to ...	Sinatra, Stephen	(503) 555-1741		stephen.sinatra@yahoo.com

Here, columns have been rearranged so those that Ann uses most are to the left. Note the triangle to the right of File As, which indicates that the list is sorted alphabetically by this column. If the triangle were pointing down, the list would be sorted in reverse alphabetical order.

## DEVELOP YOUR SKILLS OU3-D4

Outlook allows you to sort your Contacts based on a large number of criteria. In this exercise, you choose the order in which the columns of data appear.



**You can complete this exercise “live” or via the online WebSim.**

- Follow the step for your situation:
  - If using the WebSim: In your web browser, go to <http://labyrinthlab.com/2016/websim/OU3D4>.
  - If using Outlook “live”: Continue with step 2.
- Choose **Home**→**Current View**→**Phone** .
- Follow these steps to move a column header and resize a column:

**A** Place your mouse pointer over the **Business Phone** heading.

	FULL NAME	COMPANY	FILE AS ▲	Country/Region	BUSINESS PHONE
Click here to add a new ...					
	Frasier Heron		Heron, Frasier		
	Sadie James		James, Sadie		(503) 555-8733
	Mary McKay	From Shelter to ...	McKay, Mary		(503) 555-7856
	Stephen Sinatra	From Shelter to ...	Sinatra, Stephen		

**B** Click and drag to the left, releasing the mouse button when the black box is to the left of the Country/Region column.

FILE AS ▲	BUSINESS PHONE
Heron, Frasier	
James, Sadie	(503) 555-8733
.. McKay, Mary	(503) 555-7856
.. Sinatra, Stephen	

**C** Place your mouse pointer on the line between the File As and Business Phone columns until you see the adjust pointer.

**D** Drag the line to the left to decrease the size of the File As column to be just large enough to fit the widest entry.

- Click the **Full Name** column header to sort by that column. Click it again to reverse the order of the sort.

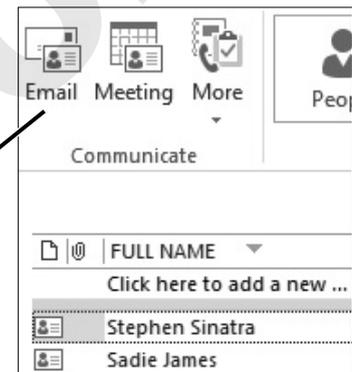
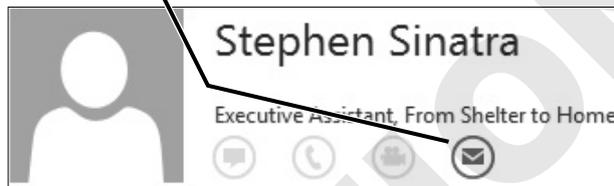
## Sending Messages to Contacts

When you have contacts entered in the People element, addressing email messages is easy. When you type an email address, there is always the possibility of typing it incorrectly. In addition, as your list of contacts grows, remembering all of them becomes more difficult. After you open a new message window, you can click the To, Cc, or Bcc button to display a list of your contacts. In addition, if you begin typing a contact in the To, Cc, or Bcc field, you can choose to have it fill in for you. If you do not want recipients to see other recipient names, address the message in the Bcc box rather than the To box.

The way in which you go about sending an email from the Contacts list depends on which view is displayed. In People view, you click the Email button below the contact name in the Reading pane. In all other views, you select a contact and then choose the Email command from the Ribbon.

When in People view, click the Email button to send a message to a contact.

In all other views, select a contact and then choose the Email command from the Ribbon.



### DEVELOP YOUR SKILLS OU3-D5

Once you have saved a person's contact information, Outlook offers shortcuts for working with that person. In this exercise, you will see how easy it is to send messages to a contact on file.



**You can complete this exercise "live" or via the online WebSim.**

1. Follow the step for your situation:
  - If using the WebSim: In your web browser, go to <http://labyrinthlab.com/2016/websim/OU3D5>.
  - If using Outlook "live": Continue with step 2.

2. Follow these steps to send an email to Stephen from Phone view:

**A** Click to select **Stephen Sinatra**.

**B** Click the **Email** command.

**C** Click in the **Subject** field and type **Set Up Budget Review Time**.

**D** Click in the message box and type the message as displayed.

3. Send the message.

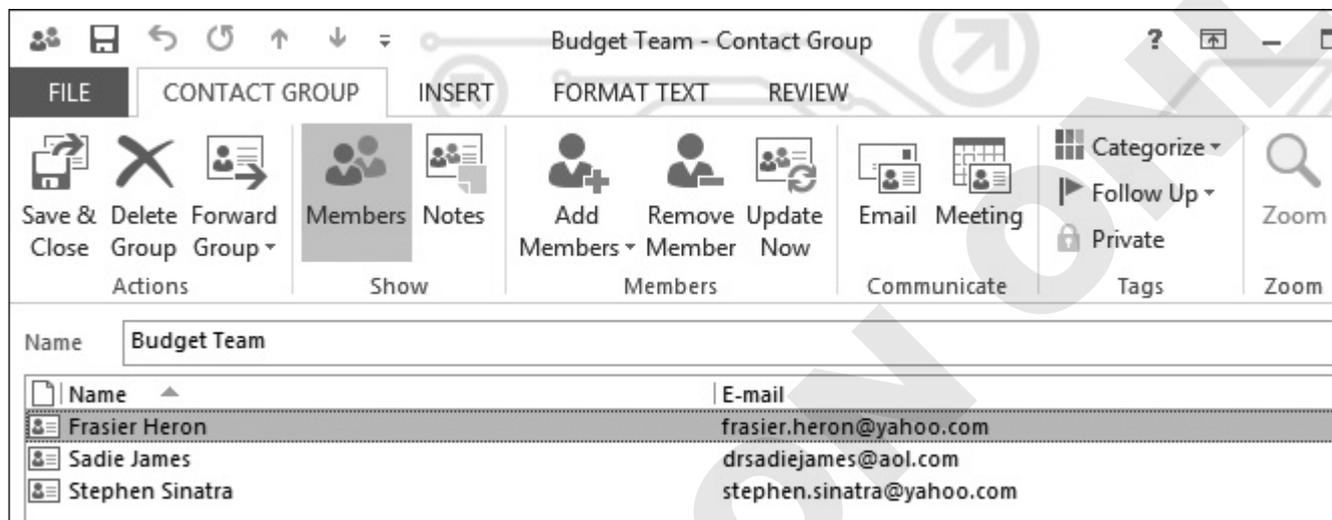
## Working with Contact Groups

A quick way to send messages to the same group of people is to create a contact group, formerly called a distribution list. This feature can definitely save you time if you find yourself sending messages to the same group, such as a project team. When you create a group, its name appears alphabetically in the address book. When you want to send a message to the group, you address the message by using the group name, either selecting it from the list or typing it in the To box. The contacts you place in a group will still appear individually in the address book, so you can continue sending them individual messages, and they can be members of multiple groups.

### Creating Contact Groups

You start creating a group by choosing the command from the Home tab in the New group. There are two options: using the New Contact Group button and choosing Contact Group from the New Items list. Both commands open a blank Contact Group window in which you give your group a name and begin adding members. You can also remove someone from a group. For example, if you create a contact group for your team and someone leaves, you can remove that person and add a replacement.

One thing for you to be aware of is that contact groups are made up of only the contacts you have listed in the People element. So, if you wish to add a new member to a contact group, you must either first add that person as a contact or add the person as a contact while creating the group. Contact groups cannot be created in Outlook with POP3 accounts such as Outlook.com and Gmail. However, you can place copies of all of your contacts in your Outlook data file and then create the groups; they just won't be available to you if you are accessing your email online. If you are working on an Exchange server, you are able to create contact groups.



You can add contacts as members of a contact group.

## DEVELOP YOUR SKILLS OU3-D6

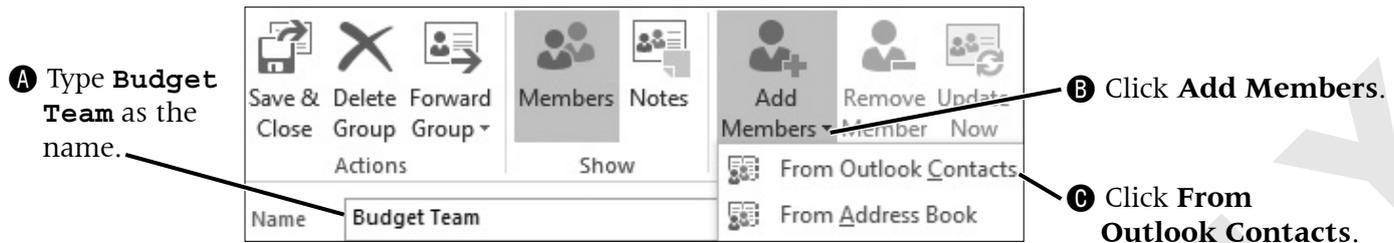
Using groups makes it easy to communicate with a number of people. In this exercise, you will create a contact group that will allow you to send messages to many people at one time.



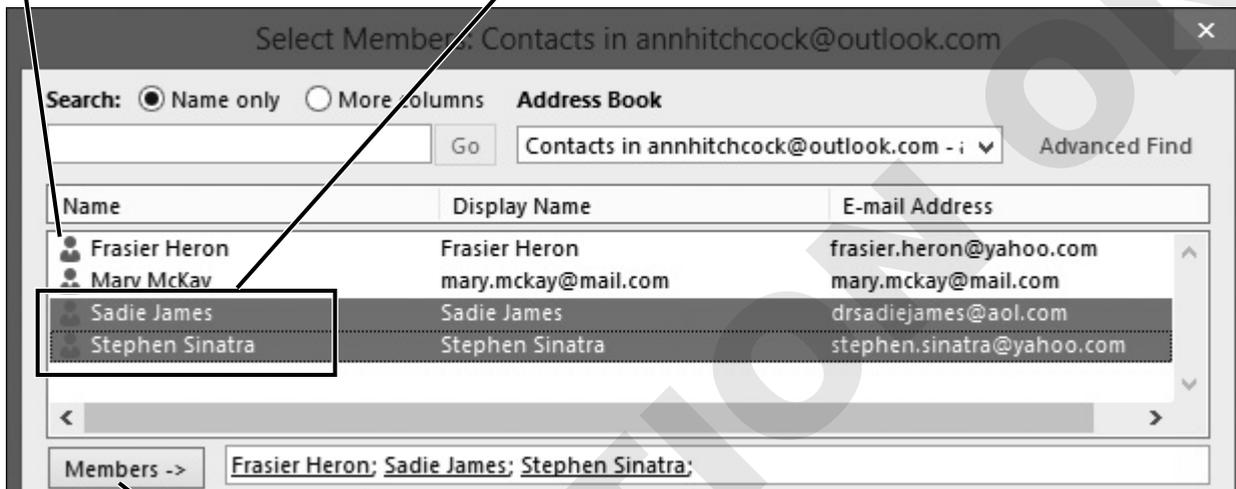
**You can complete this exercise “live” or via the online WebSim. If working “live,” create three sample contacts or use existing ones.**

- Follow the step for your situation:
  - If using the WebSim: In your web browser, go to <http://labyrinthelab.com/2016/websim/OU3D6>.
  - If using Outlook “live”: Continue with step 2.
- Choose **Home**→**New**→**New Contact Group** .

3. Follow these steps to create the new group:



**D** Double-click **Frasier Heron**. **E** Click **Sadie James**. Then hold down **Ctrl** and click **Stephen Sinatra**.

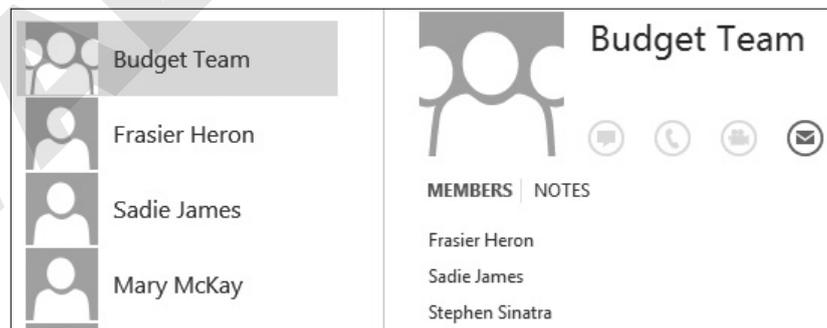


**G** Click **OK**.

4. Choose **Contact Group**→**Actions**→**Save & Close**

## Sending Messages to Groups

When you create a contact group, its name appears in the list of contacts in alphabetical order. A contact group is denoted in the People view by an icon with multiple people on it.



Notice how a contact group appears in People view.

To send a message to everyone in a contact group while in a new message window, you enter the group name where you normally enter a contact's name. Another easy method is to click on the Mail icon in the People pane when you have the group name highlighted in the list. This will open a new message window with the group name already in the To field.

## DEVELOP YOUR SKILLS OU3-D7

*Let's communicate! In this exercise, you will create a new message and send it to a group.*



**You can complete this exercise “live” or via the online WebSim.**

1. Follow the step for your situation:
  - If using the WebSim: In your web browser, go to <http://labyrinthelab.com/2016/websim/OU3D7>.
  - If using Outlook “live”: Continue with step 2.
2. Click the **Mail**  link on the Navigation bar.
3. Choose **Home**→**New**→**New Email** .
4. Follow these steps to create a message for the budget team:

**A** Type **b** and then tap **Tab** to choose **Budget Team** from the list.

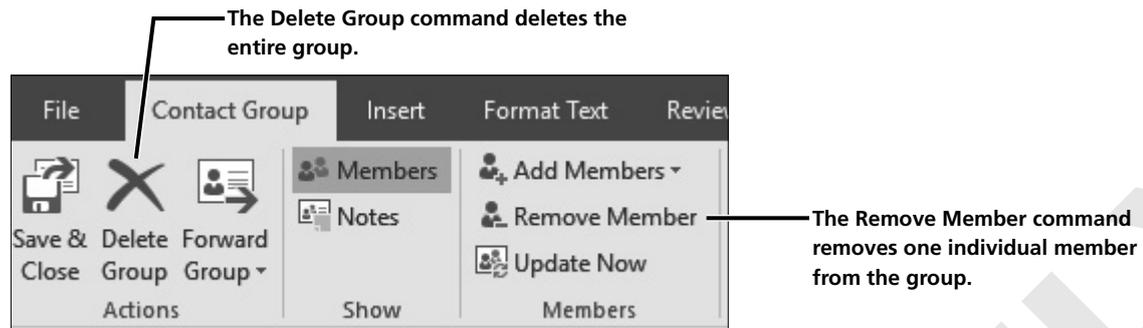
**B** Click in the **Subject** field and type **Next Budget Meeting**.

**C** Type the message as displayed.

5. Send the message.

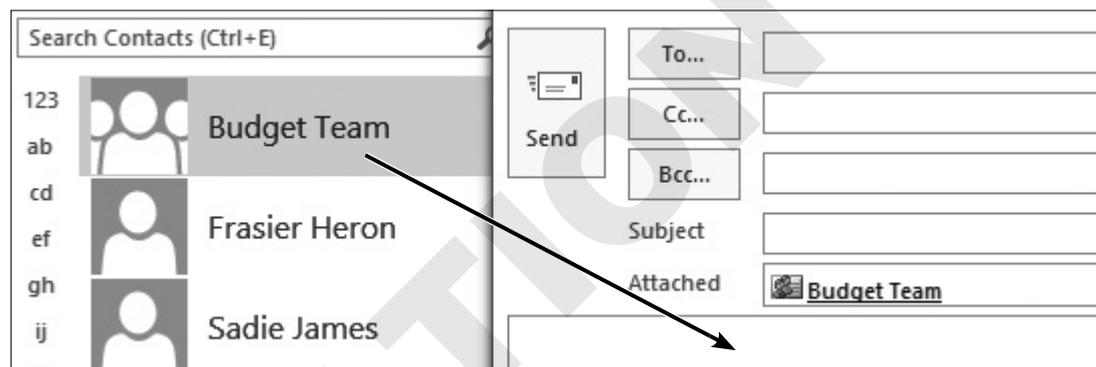
## Revising a Contact Group

You can remove one member by using the **Delete** key or the Remove Member command in the Members group. Delete an entire group by using the Delete Group command in the Actions group on the Ribbon. When you remove a member or delete a group, you cannot undo the action. When you delete a member from a group, the contact is not deleted from your address book. However, when you edit the information of someone in the group, the address book information is automatically updated. Make sure to choose Remove Member rather than Delete Group from the Ribbon when removing a person from a contact group, or you will have to recreate the contact group from scratch. (I speak from experience on this one!)



You can also add members to a contact group at any time by opening the group and choosing to Add Members in the same way you did when you first created the group.

One nice feature of Outlook is the drag-and-drop capability. When a contact group is created, you can drag it into an email message and send it to other Outlook users for them to add to their People element. Or you can click on the Forward Group button in the Actions group and Outlook will create an email message with the details of your group members attached.



If you drag a contact group into the message field of an open email message, Outlook will add the group as an attachment and the recipients can add it to their own Contacts lists.

## DEVELOP YOUR SKILLS OU3-D8

*Group memberships frequently change. In this exercise, you will add a new member, for whom you don't have a saved contact, to an existing contact group.*

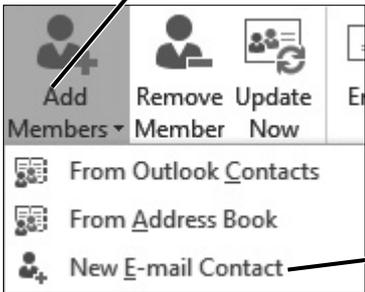


**You can complete this exercise “live” or via the online WebSim.**

1. Follow the step for your situation:
  - If using the WebSim: In your web browser, go to <http://labyrinthelab.com/2016/websim/OU3D8>.
  - If using Outlook “live”: Continue with step 2.
2. Click the **People**  link in the Navigation bar.
3. Double-click the **Budget Team** contact group.

4. Follow these steps to add a new group member who is not yet a contact:

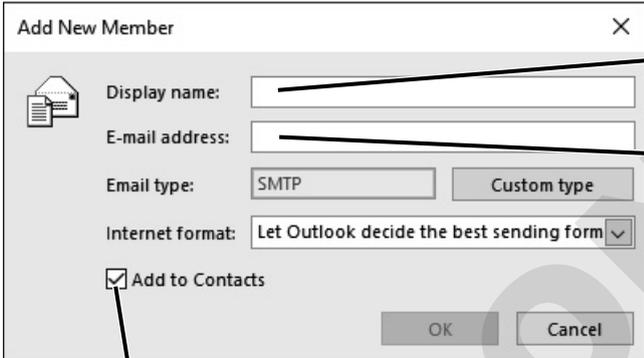
**A** Click **Add Members**.



**B** Choose **New E-mail Contact**.

**C** Type **Sam Vashon**.

**D** Tap **[Tab]** and type **samuel.vashon@gmail.com**.



**E** Ensure that **Add to Contacts** is selected.

**F** Click **OK**.

5. Click **Save & Close** .

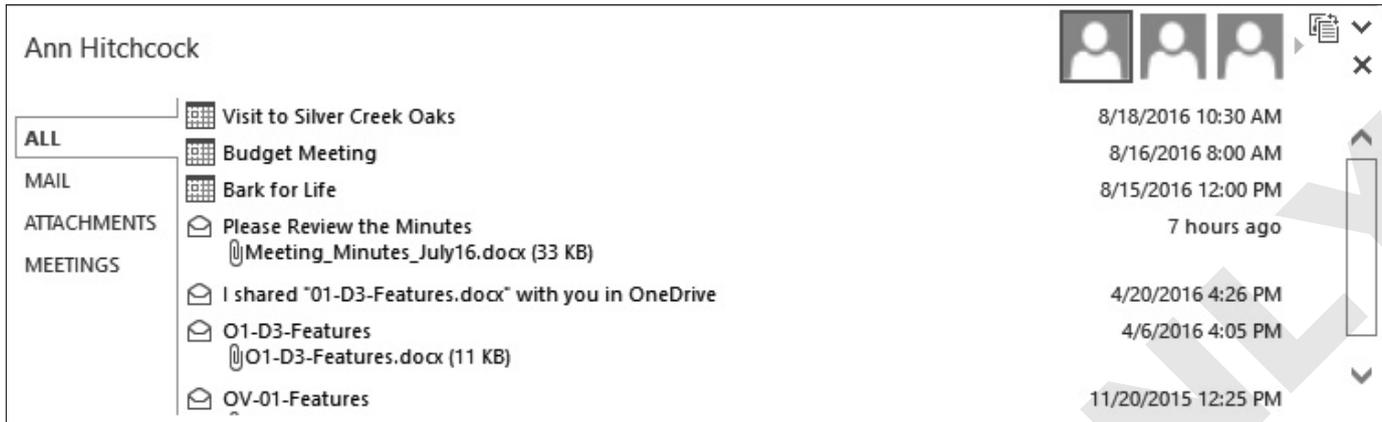
## Staying Connected with People

Outlook makes it easy to stay connected with people, not just via email, but also by tracking files and meetings and other actions in Outlook.

### The People Pane

The People pane keeps track of all Outlook actions—emails, attachments, meetings, etc.—that you have with your contacts. When you are in the Mail element, the People pane can be displayed below the Reading pane or as part of the To-Do bar along the right side of the program window.

The People pane can be maximized so you can see a list of communications with a contact when you click an item, such as an email or meeting. When you activate the People pane and click an item, two icons appear on the right of the pane: One is always your icon, and the other is for the selected contact. When the pane is open, four tabs along the left side filter the items to show Mail, Attachments, Meetings, and All (this allows you to view all of the previous four options in one location).



The People pane helps you keep track of emails, files, and meetings for your contacts.

## DEVELOP YOUR SKILLS OU3-D9

*In this exercise, you will use the People pane as a quick way to email a contact.*



**You can complete this exercise “live” or via the online WebSim.**

1. Follow the step for your situation:
  - If using the WebSim: In your web browser, go to <http://labyrinthlab.com/2016/websim/OU3D9>.
  - If using Outlook “live”: Continue with step 2.
2. Click the **Mail**  link on the Navigation bar.
3. Click to select the email from Ann Hitchcock.
4. Click the expand button on the People pane.



5. Hover over the contact icons on the upper-right side of the People pane.

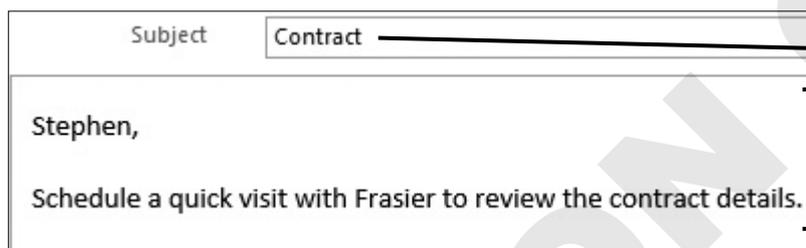


6. Follow these steps to send an email to Stephen Sinatra from the People pane:



**A** Hover your mouse pointer over the middle People icon to pop up the toolbar containing Stephen Sinatra's information.

**B** Move your mouse over the toolbar and click the **Send Email** button.



**C** Type **Contract** as the subject.

**D** Tap **Tab** and type the message displayed.

7. Send the message.

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# Self-Assessment

Check your knowledge of this chapter's key concepts and skills by completing the Self-Assessment. The answers to these questions can be found at the back of this book.

1. Every field must be filled in for each contact in the Contacts list. True False
2. You can search for People from a peek off the Navigation bar. True False
3. You can add a large number of contacts at one time in Outlook. True False
4. The People Card helps you to keep track of all your contact information in one location, and it can be accessed from a variety of places throughout Outlook. True False
5. When you put a contact in a contact group, the name disappears from the complete list of contacts. True False
6. You can sort the Contacts list by clicking any of the column headers in Phone or List view. True False
7. Once someone is added to a contact group, they cannot be removed from it. The contact group must be deleted or recreated. True False
8. The People pane can keep track of your contacts' social network profiles. True False
9. When you delete a member from a group, the contact is also deleted from your address book. True False
10. To delete someone from a contact group, select the name from the opened list and tap **Delete**. True False
11. Which of the following is NOT a view available in the People Home tab, Current View group?
  - A. Business cards
  - B. Peek
  - C. Phone
  - D. People
12. What does the People toolbar associated with a contact NOT enable you to do?
  - A. Quickly chat
  - B. Schedule a meeting
  - C. Send an email
  - D. Add a new contact
13. What happens when you type a contact group name in the To box of a message?
  - A. Each group member's name appears separately in the To box.
  - B. The message is sent to each group member.
  - C. Both A and B
  - D. None of these options
14. What happens when you edit the information of someone in a contact group?
  - A. The information is updated in the contact group only.
  - B. You cannot edit the information of a contact in a contact group.
  - C. The information in the complete address book is updated automatically.
  - D. All information is deleted.