

Contact Groups in Microsoft Outlook 2010

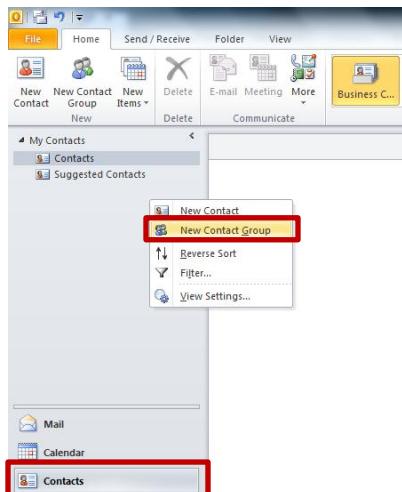
What are Contact Groups?

A contact group is a collection of contacts in your email. It provides an easy way to send e-mail messages to a group of people. For example, if you frequently send messages to the marketing team, you can create a contact group – called “Marketing Team” – that contains the e-mail addresses of everyone on that team. A message sent to this contact group goes to all recipients listed in the contact group. You can include contact groups in email messages, task requests, meeting requests, and even in other contact groups.

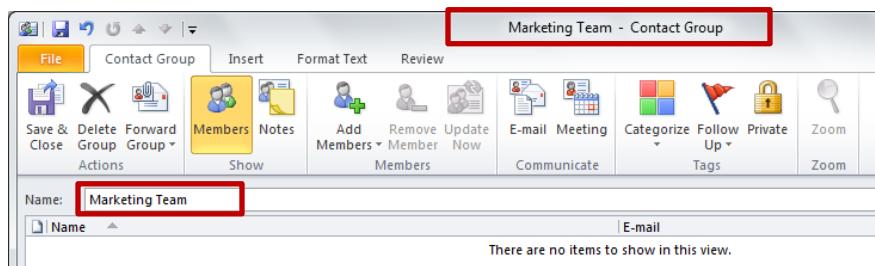
Note: Prior to Outlook 2010, contact groups are referred to as Distribution List in 2007.

Create the Contact Group

1. On the Outlook home page, click the **Contacts** Button, located in the left pane. Right-Click the white space and click **New Contact Group**.



2. In the name box enter a meaningful name for your group. Press the **Enter** key on your keyboard. This will cause the title at the top of your window to change to the name you have just entered. I.E. “Marketing Team”.



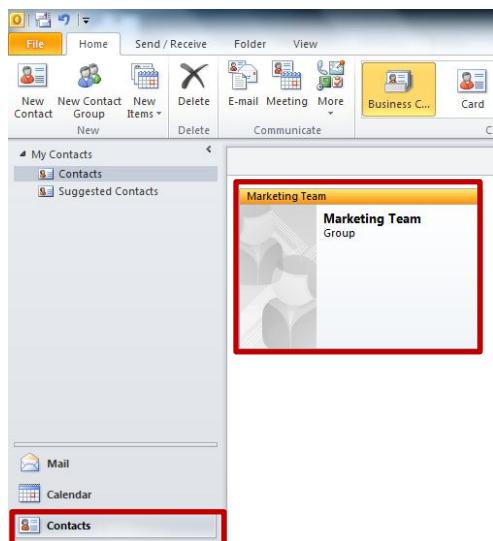
Your contact group is now created; you can begin to add email contacts to your contact group.

Add Contacts to Your Contact Group

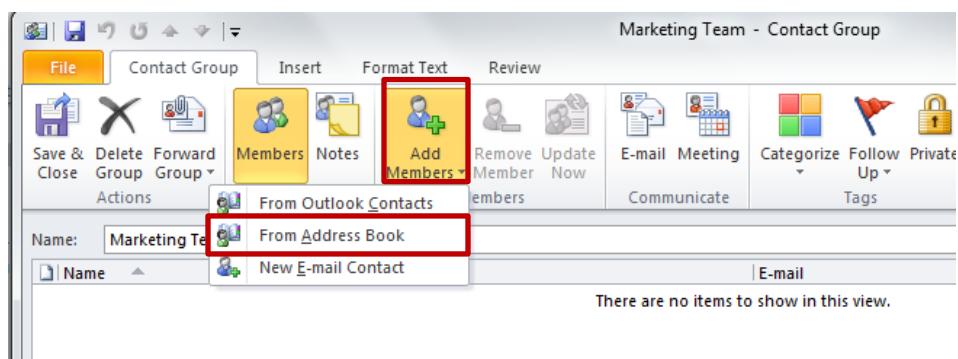
Once your contact group has been saved in the contacts folder you can begin adding email contacts to your contact group. In this section and in the following, we demonstrate the use of adding members from the address book, manually entering new contacts, and copying contacts from an email message.

Adding Contacts from Address Book

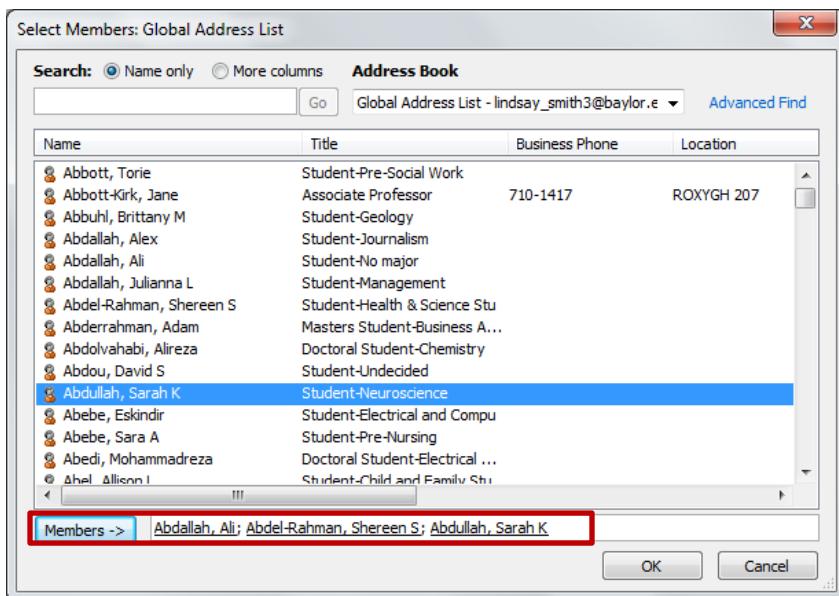
1. Ensure the contact group that you wish to add contacts to is open. (By double clicking the contact group from the Contacts tab.)



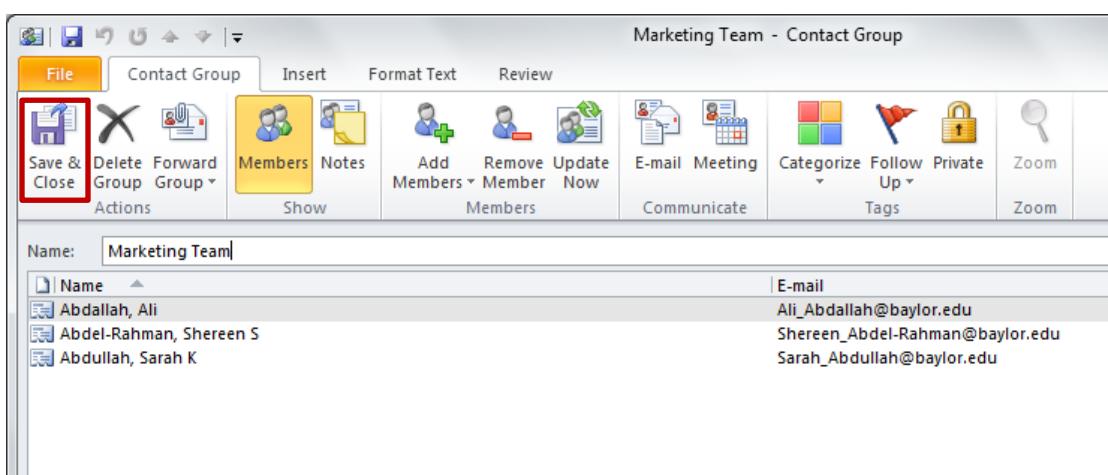
2. Click the **Add Members** button to add members from your Address Book. Then, click **From Address Book** from the drop-down menu.



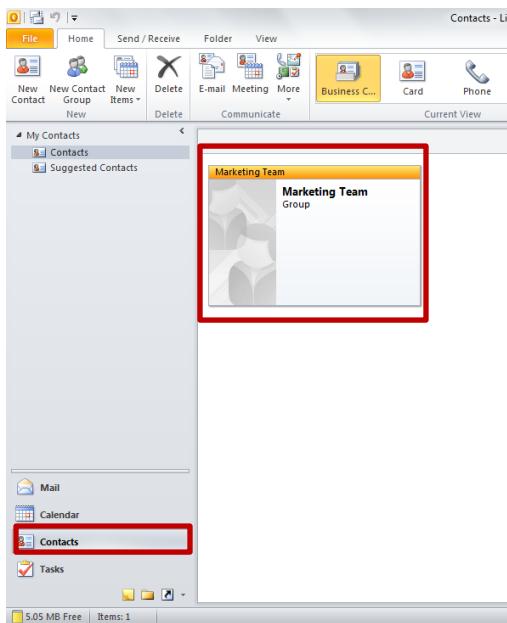
3. Click on the contact you wish to add to your contact group, then click the **Members** button on the bottom left of the screen. This will add the selected contact to the text box next to the **Members** button. Add as many contacts as you wish by repeating the selection process just described. Alternatively, you can use the search box to find a specific contact. Click **OK** when finished.



4. Once you have clicked **OK**, your Contact group should now show your newly added contacts. An example appears below.
5. Once you have added all email contacts to your Contact group, click the **Save & Close** icon at top left of your screen.

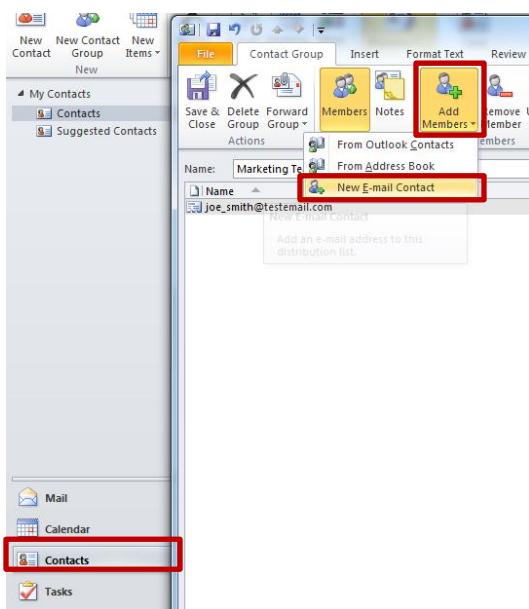


6. To open your Contact group, click the **Contacts** tab on the left side of your home page. You will see your Contact group in the white space to the right. To return back to your mailbox, select the **Mail** tab.

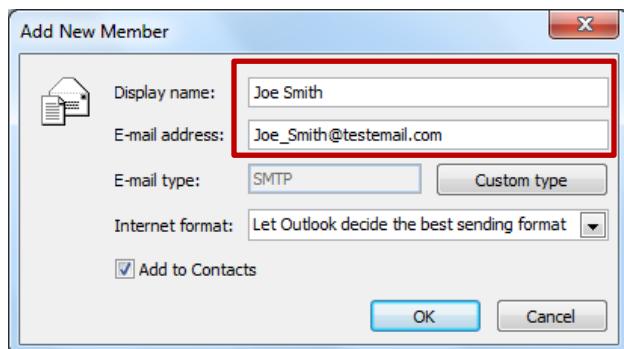


Adding Contacts Manually

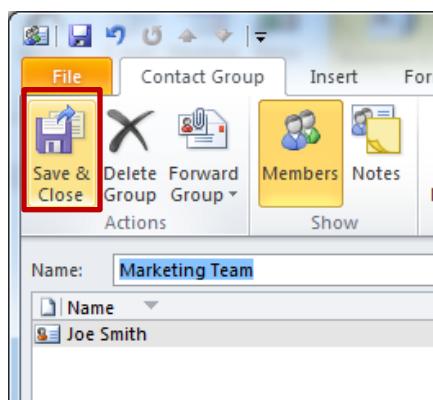
1. Ensure the contact group that you wish to add contacts to is open. By double clicking the contact group from the Contacts tab.
2. Click the **Add Members** button to add members manually. Then, click **New E-mail Contact** from the drop-down menu.



- Fill in the **display name** with what you want to appear as the contact name. Type the contact's email address into the **E-mail address** text box. Leave the **E-mail type** and **Internet format** options on their automatic settings, and make sure the **Add to Contacts** box is checked. Click **OK**.

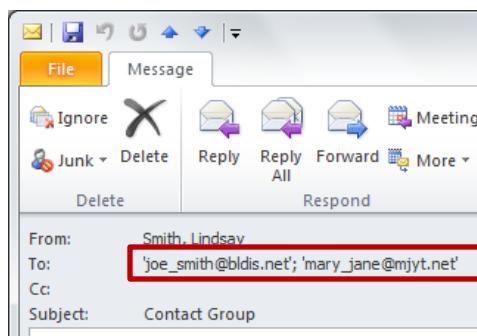


- Click **Save & Close** when finished. This will add your new contact to the contact group. Repeat the previous steps for each additional contact you want to manually add to the group.



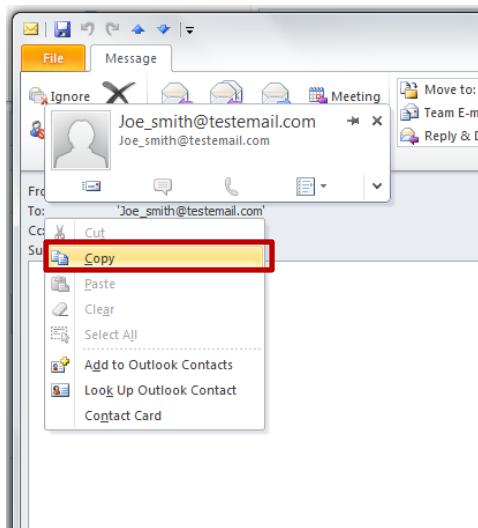
Adding Contacts from an Email Message

- Open the email message that you wish to copy a contact from (this can be a sent or received message). With your mouse, hover over the name(s) in the **From** or **To** box that you wish to copy to your Contact group. Hovering over the desired contact(s) will cause it to turn blue.

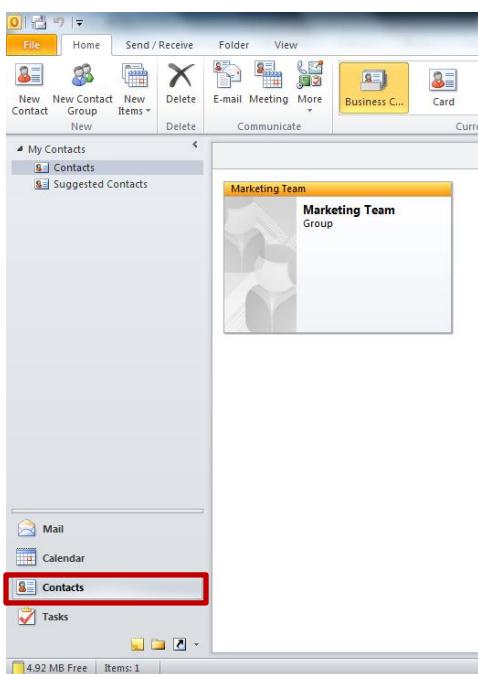


2. Right click on the contact(s) you are currently hovering over and select **Copy** from the dropdown menu. Then, you can close the email.

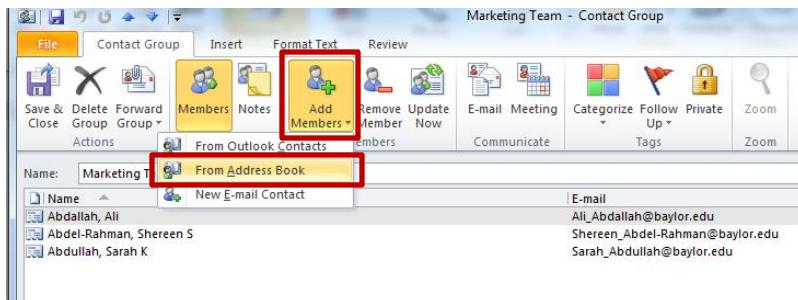
Note: Hovering over a contact will display a contact box to appear showing additional information, and allowing you to do additional actions if desired. You can ignore this for the purpose of copying the contact.



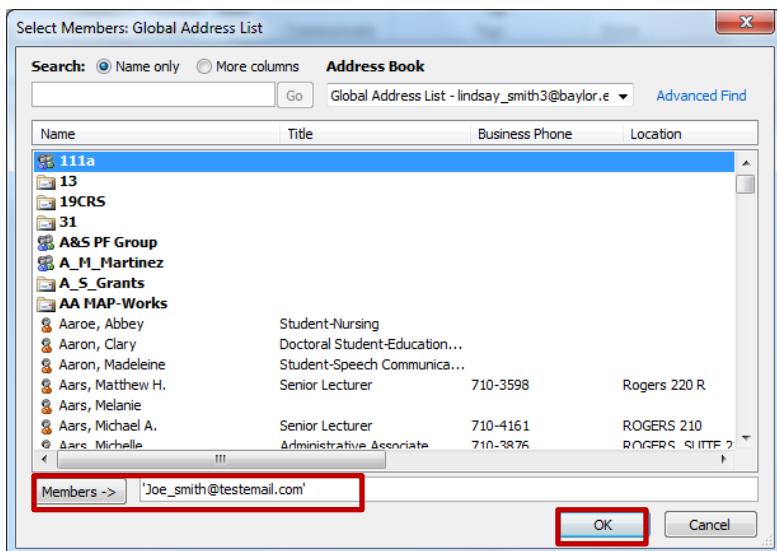
3. On the Outlook 2010 home page, click the **Contacts** button located in the left pane. Open your desired contact group by double clicking it.



4. Once you have double clicked on your contact group, click the **Add Members** button, on the **Contact Group** tab, in the **Members** group. Select **Address Book**.

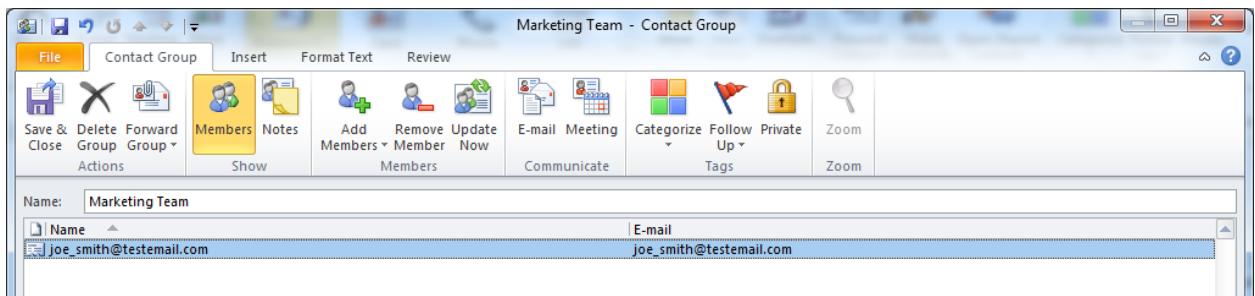


5. At the bottom of the **Select Members** dialog box, in the **Members** box, right-click and then **Paste** your contact(s) into the members text box. Click **OK** when done.



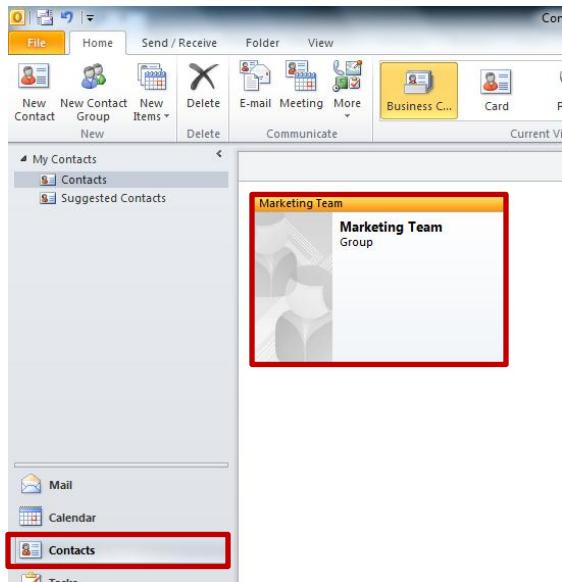
The member's e-mail address will be included when you copy and paste from the original e-mail message.

6. The contact is now added to your contact group.

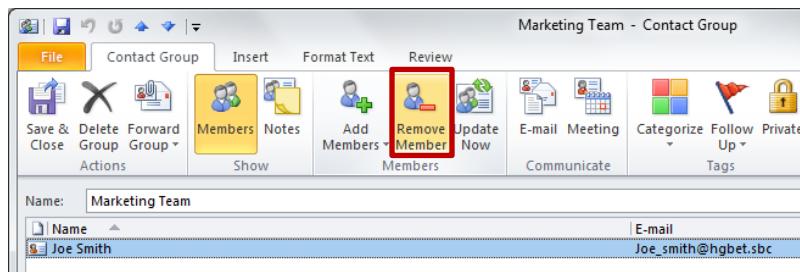


Deleting a Contact from a Contact Group

1. On the Outlook 2010 home page, click the Contacts Button located in the left pane. Double click the contact group you want to edit.

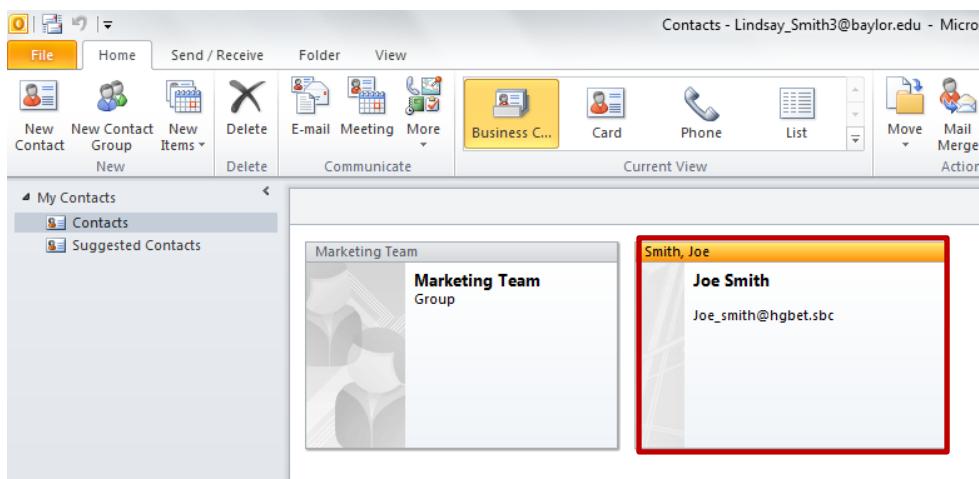


2. Click the contact you want to delete, and then click **Remove Member** under the Contacts tab.

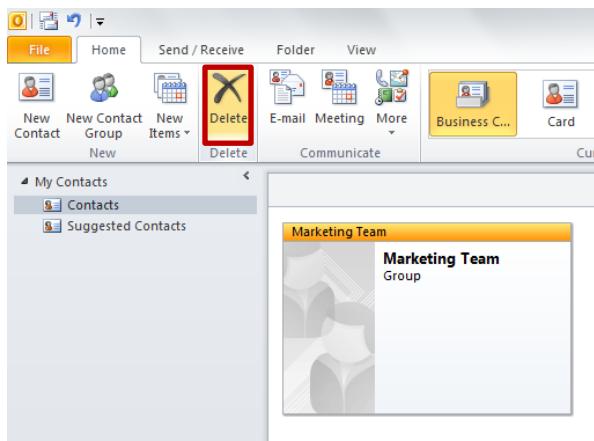


Deleting an Entire Contact Group

1. On the Outlook 2010 home page, click the **Contacts** Button located in the left pane.
2. Highlight the contact group you want to delete by clicking it once.



3. Click the **Delete** button, located at the top under the **Home** tab.



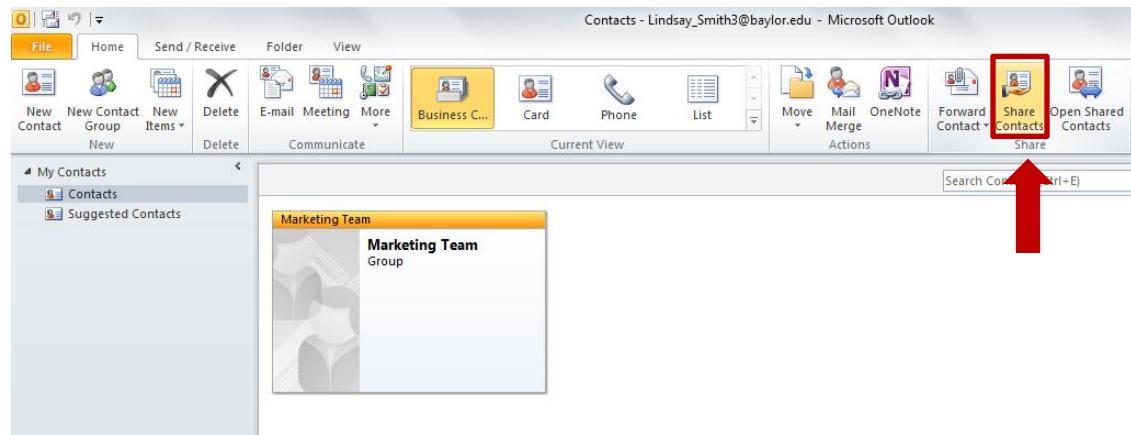
Note: You can also delete your Contact group by right clicking it and selecting Delete.

Sharing a Contact Group

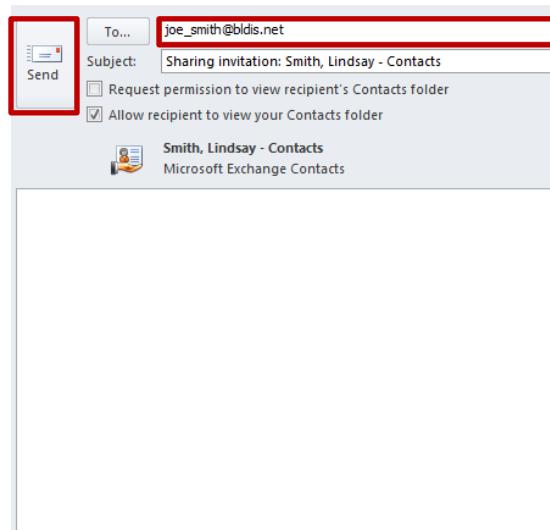
You can share a contact group with others by including it in an email message. The recipient(s) can then save it to their Contacts. There are two methods for generating the email with your contact group attached – both methods are described next.

Method One for Sharing a Contact Group

1. Highlight the contact or contact group you want to share by clicking it once. Click the **Share Contacts** button.

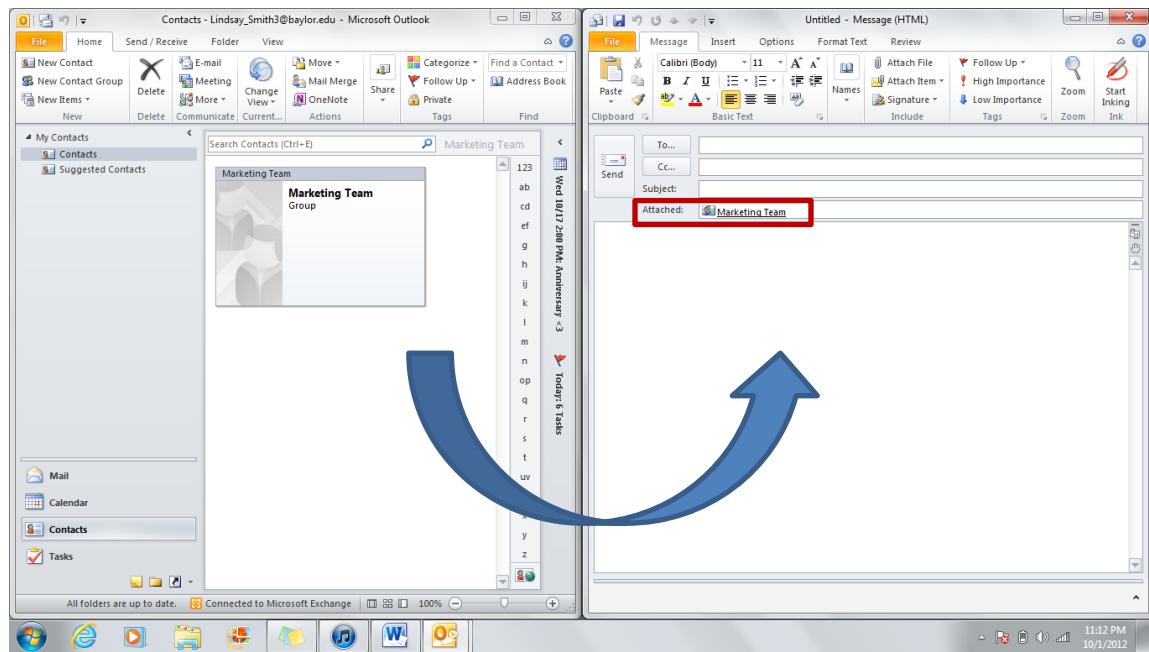


2. This action will cause a new email message to appear. Enter in the desired email addresses you want to share your contact group with. Press **Send** when finished.

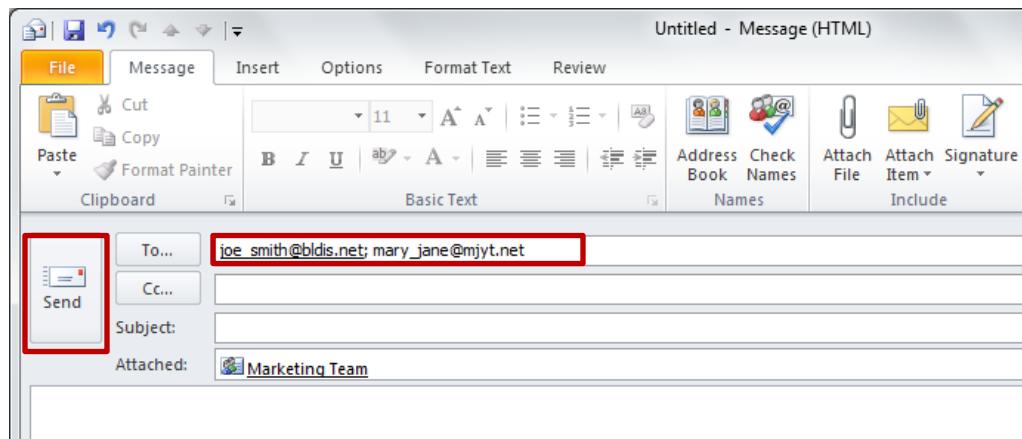


Method Two for Sharing a Contact Group

1. Create a new email.
2. With that email still open, go to the main Outlook 2010 window. Go to the navigation pane and click the **Contacts** button to open the contact group window.
3. Drag the contact group that you want to share into the new email message body. Your Contact group will appear in the **Attachment** text box of your email.



4. Enter the recipients you want to share the contact group with, then press **Send**.



Scheduling Meetings and Conference Rooms in Outlook 2010

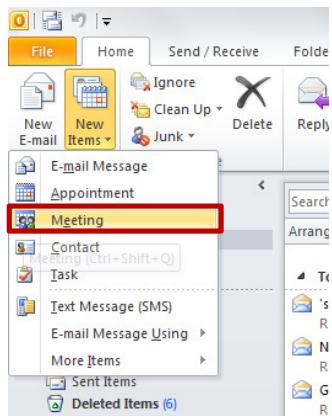
Overview of Scheduling Meetings in Outlook 2010

A meeting is an appointment in which you invite people or reserve resources for conference rooms, conference phones, projectors, and many other things. You can create and send meeting requests and reserve resources for face-to-face meetings or for online meetings. When you create a meeting, you identify the people to invite and the resources to reserve and you pick a meeting time. Responses to your meeting invitation appear in your **Inbox**. You can also add people to an existing meeting or reschedule a meeting.

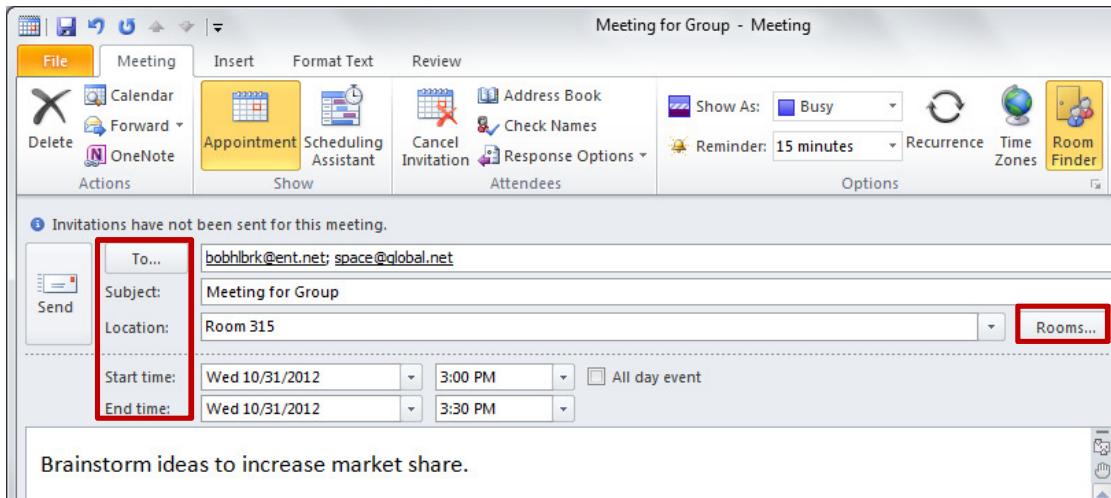
There are two types of ways to schedule a meeting; first, when you have predetermined the time you want to set the meeting time, and second, when the predetermined time has not been scheduled and you need to search for available meeting times.

Scheduling a Meeting for a Predetermined Time

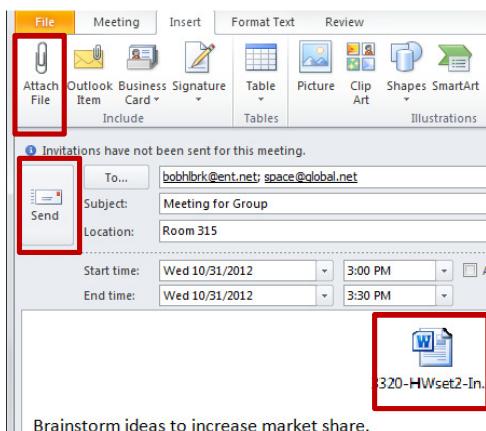
1. Under the **Home** tab, click the **New Items** button, then select **Meeting** from the drop down list.



2. Next, we will identify the meeting specifics.
 - a) In the **To** box, select the email(s) by clicking **To** or entering them manually. In the **Subject** box, type a description of the meeting.
 - b) In the **Location** box, type the location of the meeting or, if meeting rooms have been defined in advance to Outlook, click **Rooms** to choose from rooms available for automatic scheduling by using Microsoft Exchange (See the Conference Room Scheduling section).
 - c) In the **Start time** and **End time** lists, select the start and end date(s) and time for the meeting. If this is an “all day” event, select the **All day event** check box.
 - d) Type any information about the meeting that you want to share with the recipient(s) in the white space below the meeting logistics information.



3. You can also attach files related to your meeting to the meeting invitation. Go to **insert tab**, click on **attach file**, find the files you want to attach and click insert. Click **send** to send the meeting invitation to the recipients you indicated.

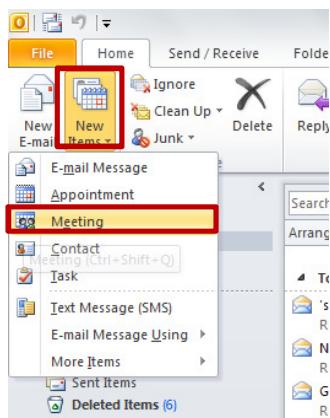


4. When you click on Calendar the meeting now appears on your Calendar and will appear on the recipient's calendar when they accept the meeting invitation.

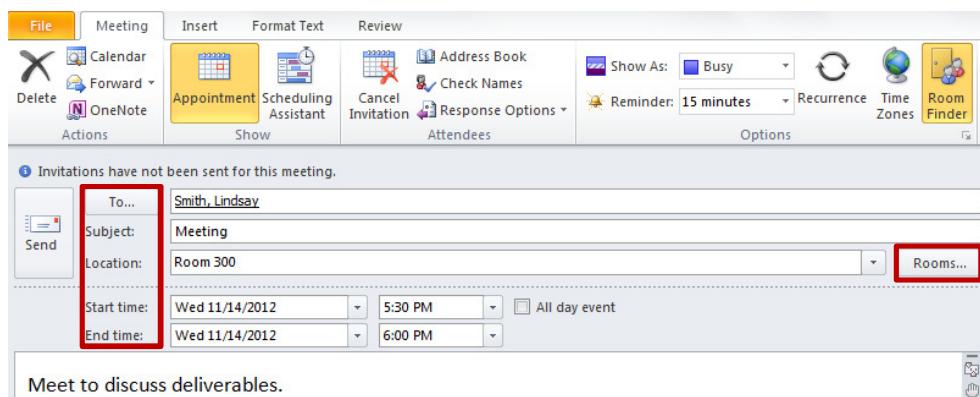


Scheduling a Meeting and Finding the Best Time

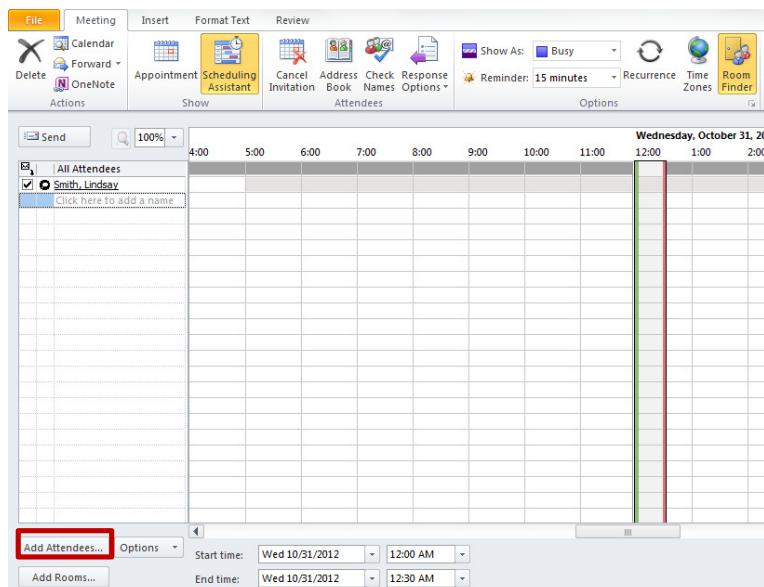
- Under the **Home** tab, click the **New Items** button, then select **Meeting** from the drop down list.



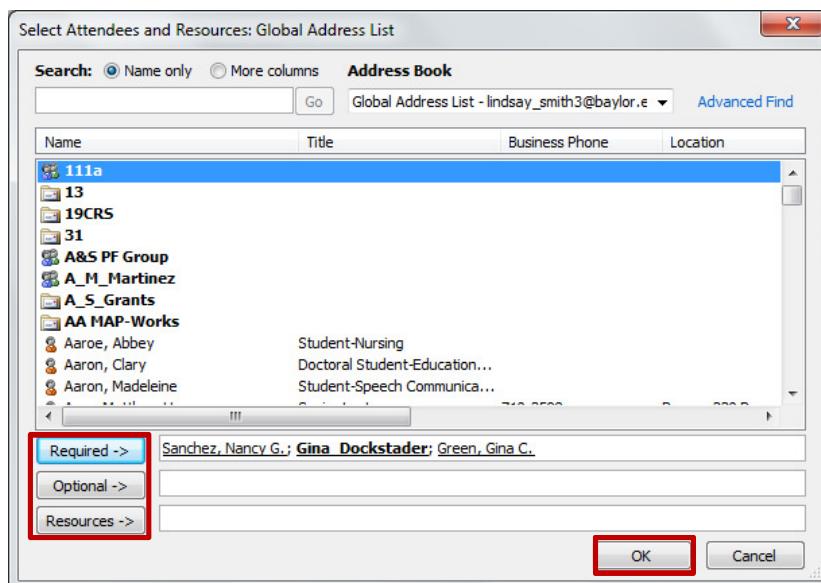
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 - In the **To** box, select the email(s) by clicking **To** or entering them manually. In the **Subject** box, type a description of the meeting.
 - In the **Location** box, type the location of the meeting or, if meeting rooms have been defined in advance to Outlook, click **Rooms** to choose from rooms available for automatic scheduling by using Microsoft Exchange (See the Conference Room Scheduling section).
 - Note that Outlook will provide a default start date and time for the meeting; however in the next steps we will determine the actual start dates and times.



3. On the **Meeting** tab, in the Show group, click **Scheduling Assistant**. The Scheduling Assistant helps to find the best time for your meeting. Click **Add Attendees** and then select the address book of choice.

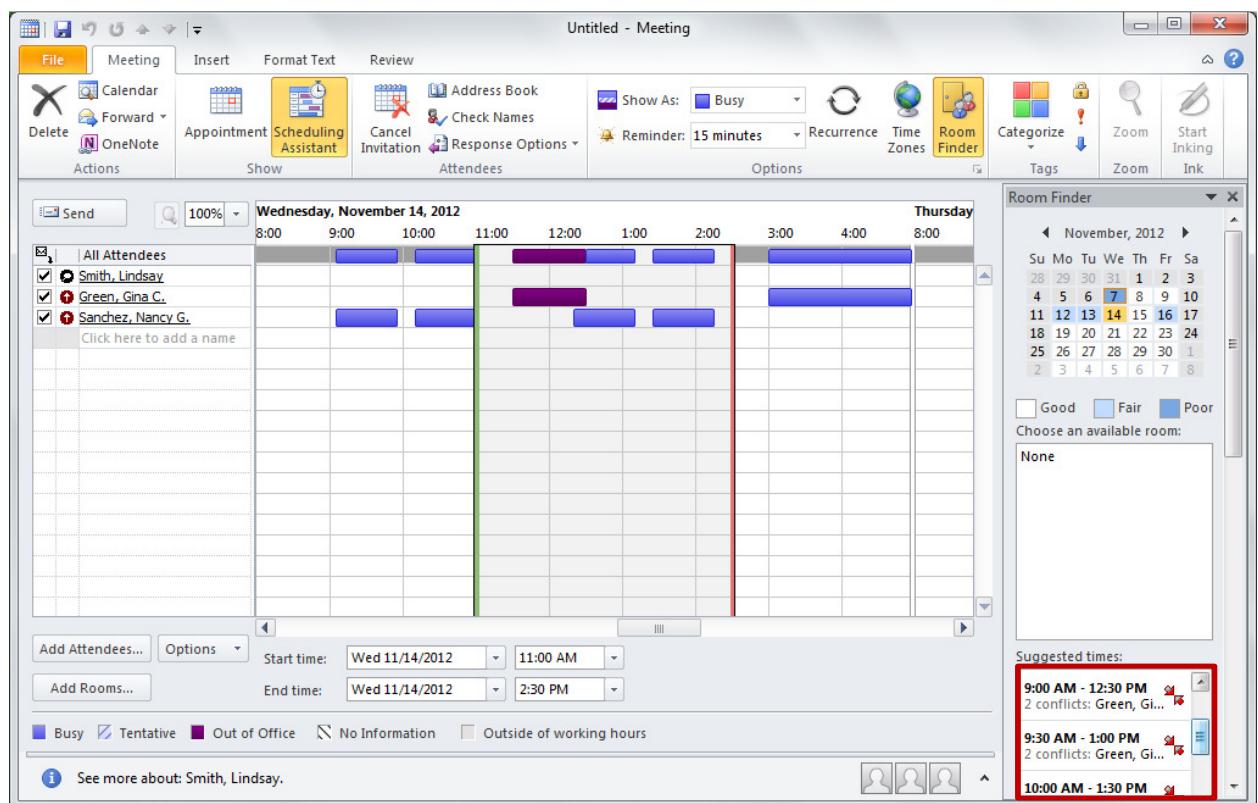


4. Select each name you want to invite to the meeting and click **Required**, **Optional**, or **Resources**. Required and Optional attendees appear in the TO box in the meeting tab, and Resources appear in the Location box. Click **OK** when you are done selecting all of your attendees.

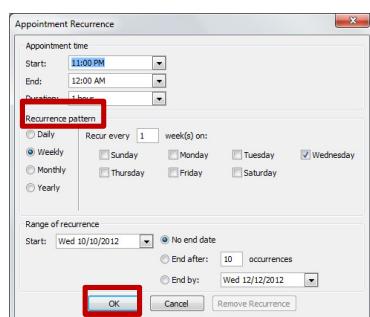


5. The free/busy grid shows the availability of attendees. A green vertical line represents the start of the meeting. A red vertical line represents the end of the meeting. Blue horizontal bars indicate when attendees are busy. Purple horizontal bars indicate when attendees are out of the office.

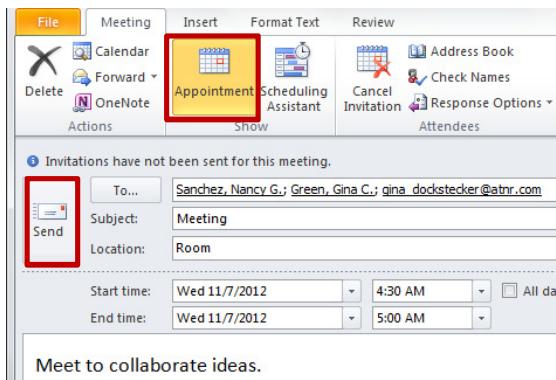
The **Suggested Times** pane locates the best time for your meeting, which is defined as the time when most attendees are available. It will also show who has a scheduling conflict. The pane is located in the Room Finder section at the bottom right of the screen. The best meeting time appears at the top of the pane. To select any of the suggested times, click the time suggestion in the pane. You can also manually pick a time on the free/busy grid.



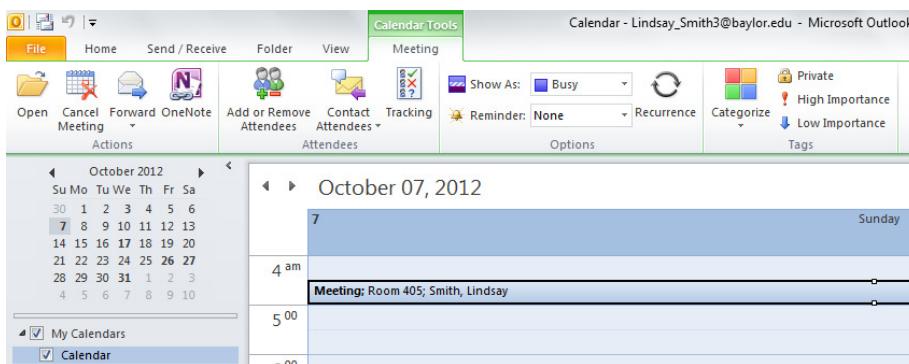
6. If you want to make the meeting occur on a regular basis, on the **Meeting** tab, in the **Options** group, click **Recurrence**, select the recurrence pattern, and then click **OK**. When you add a recurrence pattern to a meeting request, the Meeting tab changes to Recurring Meeting.



7. Within the **Meeting** tab, click **Appointment** located in the Show group. Click **send** to send the meeting invitation to the recipients you indicated.



8. When you click on Calendar, the meeting now appears on your calendar and will appear on the recipient's calendar when they accept the meeting invitation.



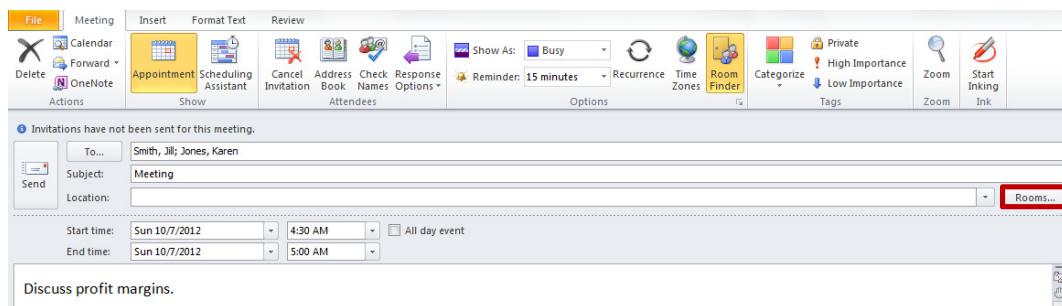
Conference Room Scheduling

Overview of Conference Room Scheduling in Outlook

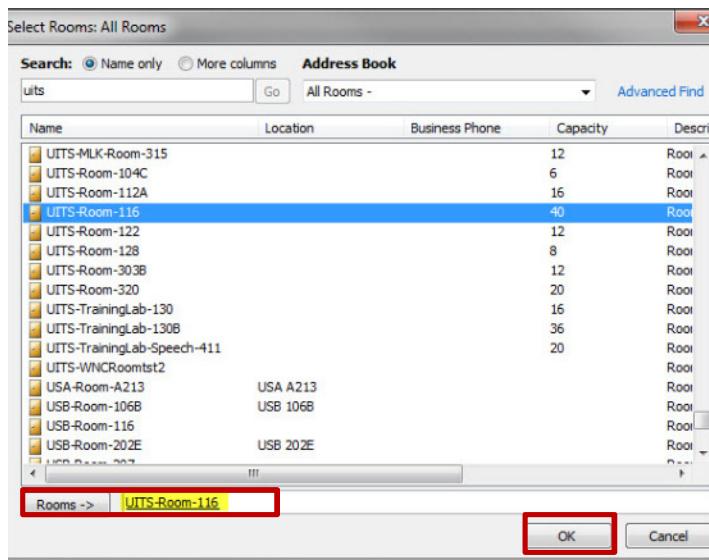
You can reserve conference rooms as you are scheduling meetings. In order to reserve these conference rooms they must have been set up in advance by your system administrator.

How to Schedule a Conference Room for a Meeting

- Schedule your meeting as indicated in the previous sections. Before sending the meeting invitation, click the Rooms button to select the room desired for your meeting.



- Click to highlight your desired conference room from the list, and then click the **Rooms** button to select that conference room. Click **OK**.



3. Click **Send** to send the meeting invitation including the reserved room.

