



University Information
Technology Services

Microsoft Office
Outlook 2016 for Windows

Using Outlook with Zimbra

Copyright © 2016 KSU Division of University Information Technology Services

This document may be downloaded, printed, or copied for educational use without further permission of the University Information Technology Services Division (UITS), provided the content is not modified and this statement is not removed. Any use not stated above requires the written consent of the UITS Division. The distribution of a copy of this document via the Internet or other electronic medium without the written permission of the KSU - UITS Division is expressly prohibited.

Published by Kennesaw State University – UITS 2016

The publisher makes no warranties as to the accuracy of the material contained in this document and therefore is not responsible for any damages or liabilities incurred from UITS use.

Microsoft product screenshot(s) reprinted with permission from Microsoft Corporation.

Microsoft, Microsoft Office, and Microsoft Visio are trademarks of the Microsoft Corporation.

University Information Technology Services

Microsoft Office: Outlook 2016 for Windows Using Outlook with Zimbra

Table of Contents

Introduction	5
Learning Objectives.....	5
Connecting Outlook 2016 to your Zimbra Account	6
Creating an Email Message	6
Addressing the Email Message	6
Setting the Global Address List as Default.....	9
Formatting your Message.....	10
Changing the Background of your Message	11
To apply a solid color background	11
To apply any other type of background.....	12
To insert a picture as a background.....	14
Proofing your Message	16
Adding New Words to the Dictionary.....	17
Attachments.....	18
To attach a file:	18
To attach another message or appointment:.....	19
Creating Signatures in Outlook	20
Setting Message Importance Level.....	22
Delay Message Delivery	22
Saving a Message as a File	23
Tell Me and Smart Lookup	24
The Smart Lookup Tool	26
Accessing the Calendar	27
Creating an Appointment	27

Creating a Recurring Appointment	29
Scheduling a Meeting.....	30
New E-mail Notifications	32
Automatically Archiving Emails.....	34
Manually Archive Emails	35
Additional Help	36

Introduction

Using Microsoft Outlook 2016 as a “desktop client” for Zimbra gives the end-user added functionality not available in Zimbra, due to the fact that the latter is a web-based application. This document covers the basic use of the Mail and Calendar features of Outlook 2016.

Learning Objectives

After completing the instructions in this booklet, you will be able to:

- Create, format, and proof an email message before sending it to recipients
- Add attachments to your email message
- Save email messages as a file
- Access the calendar
- Customize email notifications
- Create appointments and invite others
- Automatically/manually archive email folders

Connecting Outlook 2016 to your Zimbra Account

This documentation assumes that you have already connected Outlook 2016 with your Zimbra account. If this is your first time running Outlook 2016, or have not yet connected Outlook 2016 with your Zimbra account, please refer to the **Connecting Outlook 2016 with Zimbra** guide found on the UITS Document Center at: <http://uits.kennesaw.edu/cdoc>.

Creating an Email Message

Creating an email message consists of three parts: addressing the message to a recipient(s), editing the message, and sending the message.

Addressing the Email Message

By using the *address book*, you can select recipients from your existing contacts, or from other faculty/staff at KSU using the *global address list*: The following explains the steps required to create and send a message.

1. From the *Home* tab, under the *new* grouping, click the **New Email** button.

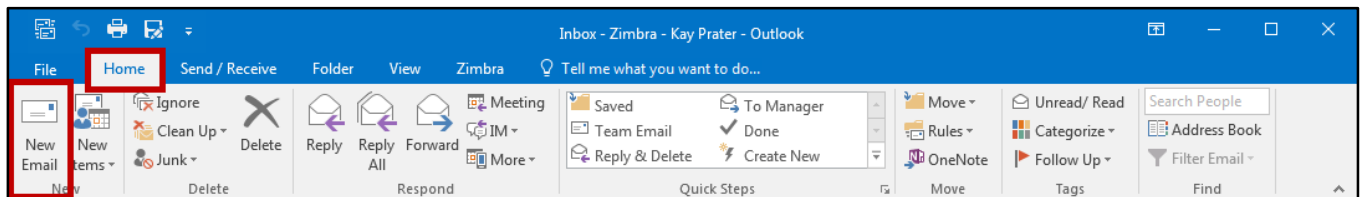


Figure 1 - New Email

2. The *Message* window opens and displays the email. Click one of the following buttons:
 - a. **To:** The primary recipients of the message. Usually, they are directly involved with the contents of the email. All recipients will see email addresses in this field (See Figure 2).
 - b. **Cc:** Secondary recipients of the message. They are not directly involved, but are copied on the message for additional information. All recipients will see email addresses in this field (See Figure 2).
 - c. **Bcc:** Email addresses listed in this field will not be displayed to recipients. Useful when you want to include a party(s) on an email, but don't want recipients to see their email address (See Figure 2).

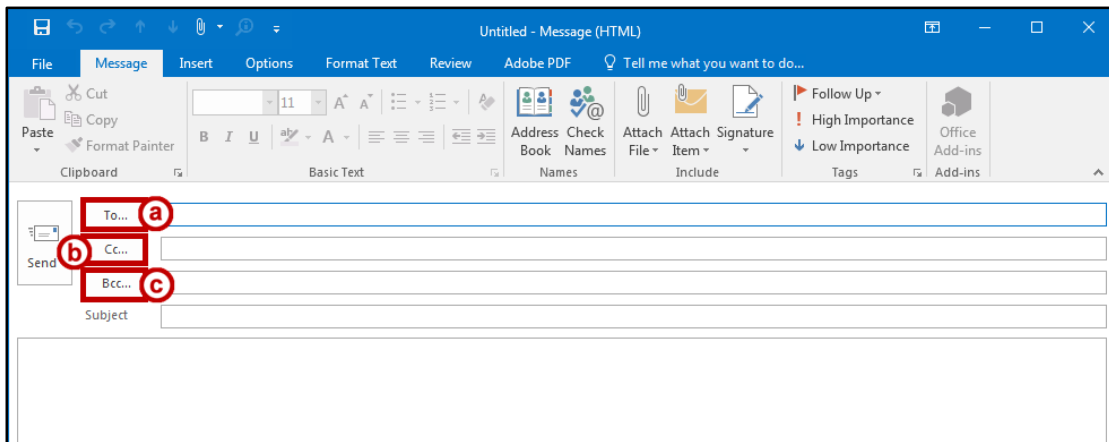


Figure 2 - To, Cc, and Bcc Fields

Note: If the *Bcc* field is not displayed, click **Bcc** under the *Options* tab.

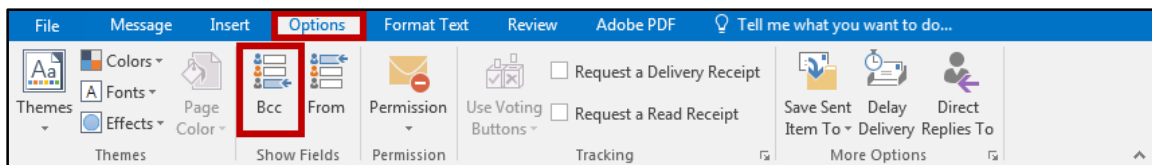


Figure 3 - Display Bcc Field

3. The *Select Names* window will appear. In the search field, type in the name of a **recipient**.

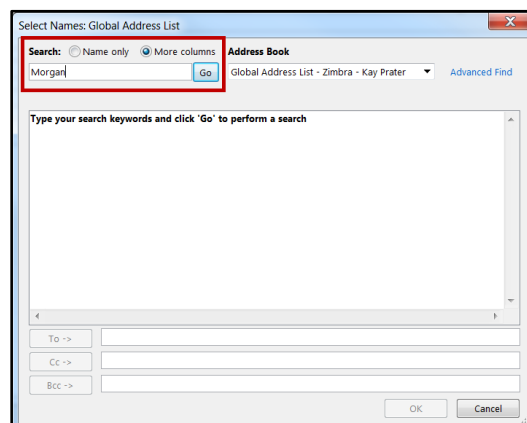


Figure 4 - Search for Recipient Email

Note: If the recipient is a KSU employee, make sure the *Global Address List – Zimbra Collaboration* is selected under *Address Book* (see Setting the Global Address List as Default).

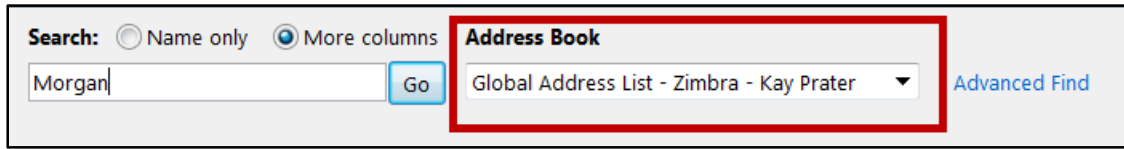


Figure 5 - Global Address List Selected

4. Click the **Go** button to run your search.

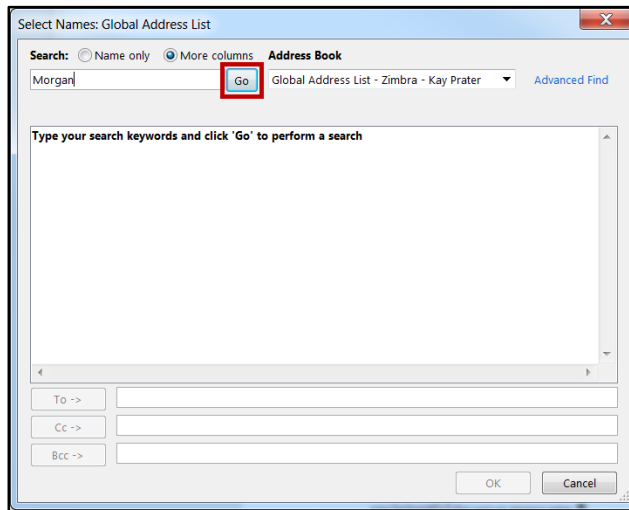


Figure 6 - Conduct Search

5. A list of names will appear. Select the recipient(s) and click the **To**, **Cc**, or **Bcc** button to add your recipient(s) to your message.

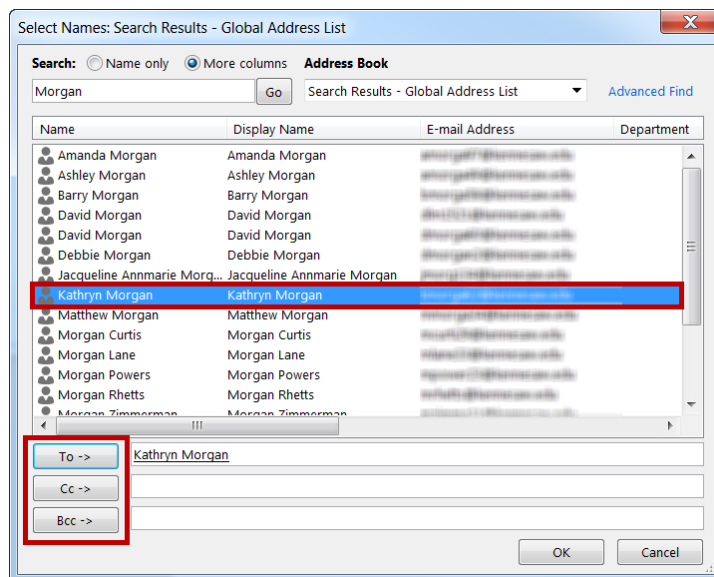


Figure 7 - Add Recipient to Email

Note: Double-clicking on the recipient(s) name will automatically add it in the **To** field.

- Repeat the search if you need more names.
- Click **OK** when you are done adding names.
- Your recipients will be added to your email message.

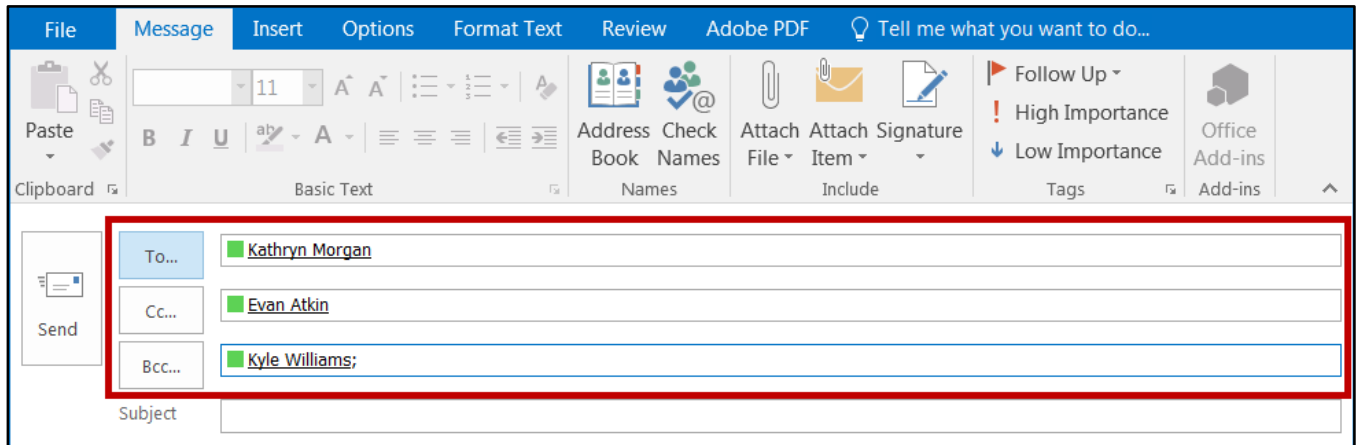


Figure 8 - Recipients Added to Email

Setting the Global Address List as Default

Addressing email messages in Outlook works a little differently than it does in Zimbra. In order to have access to the *Global Address List*, you will need to click the *To...* or *Cc...* button, rather than simply entering the name into the *To* or *Cc* field (typing a name into the *To* or *Cc* field only reveals names in the *address book*).

By default, the *Global Address List – Zimbra Collaboration* is selected to be the first address list shown when accessing your contacts:

- From the *Home* tab, under the *Find* grouping, click **Address Book**.

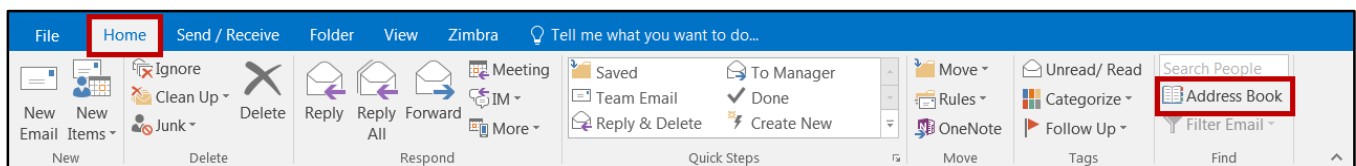


Figure 9 - Address Book

- The *Address Book* window appears. On the menu bar under *Tools*, click **Options**.

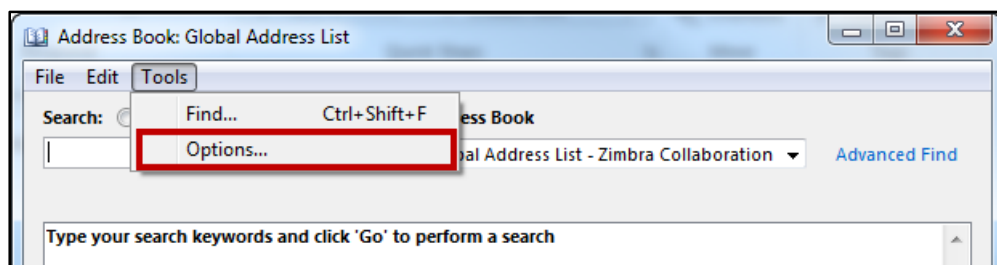


Figure 10 - Access Address Book Options

3. The *Addressing* window opens. Ensure that the **Start with Global Address List** is selected, and **Global Address List** is selected under *When opening the address book, show this address list first*.

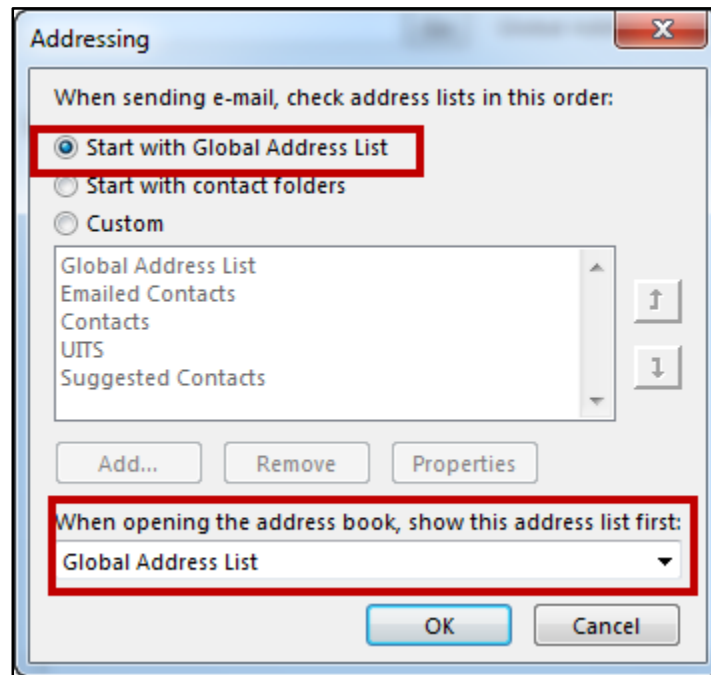


Figure 11 - Enable Global Address List as Default

4. Click **OK**.
5. Close the *Address Book* window.

Formatting your Message

Outlook 2016 provides some basic text formatting options that you can use in the body of your email while composing your message:

1. You can access *Basic Text* formatting options from the *Message* tab on the ribbon.

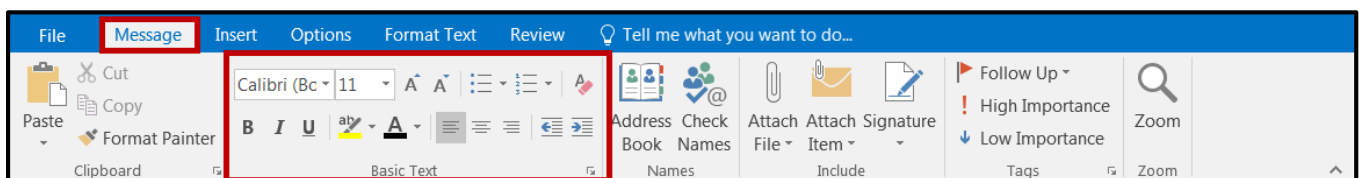


Figure 12 - Basic Text Formatting

2. You can access additional formatting options from the *Format Text* tab, including font, paragraph and styles properties.

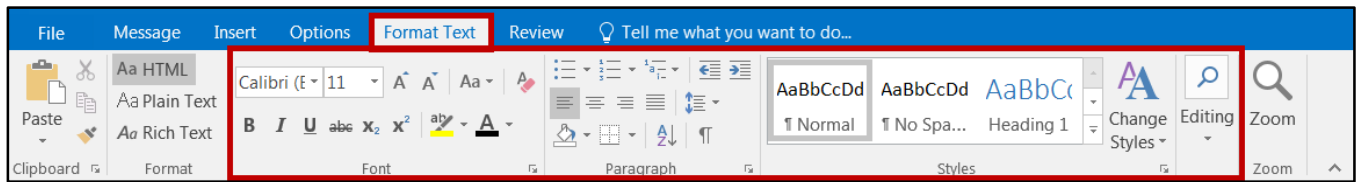


Figure 13 - Additional Formatting Options

3. From the *Format Text* tab, you can also format your message in *html*, *plain text*, or *rich text*:

HTML	Default message format. Best for making messages that look like traditional documents with various fonts, colors, bulleted/numbered lists and showing pictures (See Figure 14).
Plain Text	This format works for all email programs, but it doesn't support bold or italic text, colored fonts, other text formatting, and showing pictures inside the message (pictures can still be included as an attachment) (See Figure 14).
Rich Text	Only supported by Microsoft Exchange Client 4.0, 5.0, and all versions of Microsoft Outlook. This can format text with bullets, alignment, and other options, and you can include linked objects. Attachments appear as icons in the message body (See Figure 14).

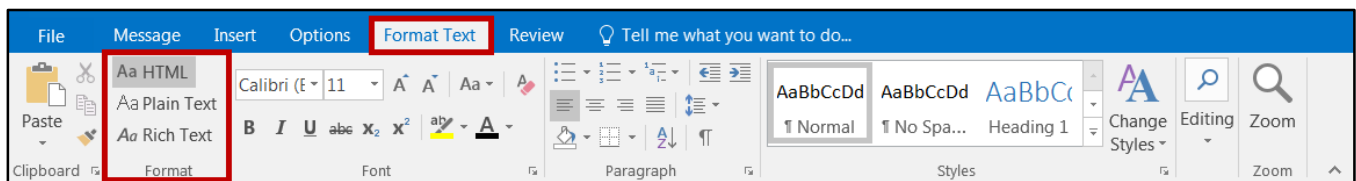


Figure 14 - Message Format

Note: How the message appears to the person receiving it depends on their email program. This cannot be controlled by the sender.

Changing the Background of your Message

You can apply different types of backgrounds to your message such as a solid color, gradient fill, textured, patterned, or you can use a picture as a background.

To apply a solid color background

1. From the *Options* tab, click **Page Color**.

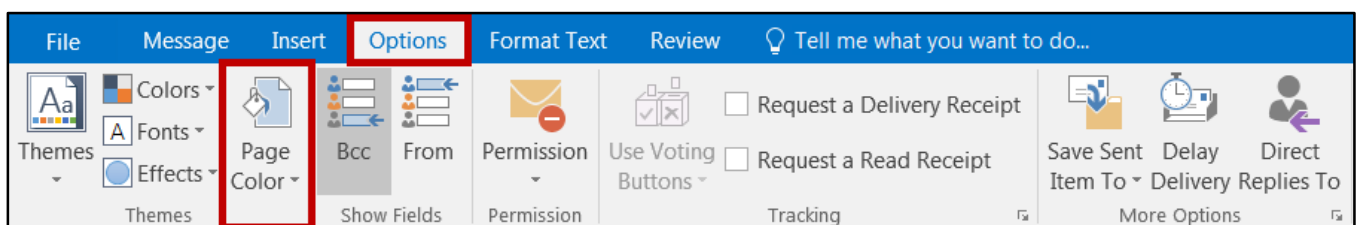


Figure 15 - Page Color

2. A dropdown will appear with several *Theme Colors* and *Standard Colors* to choose from. Click a **color** to select it as your background.

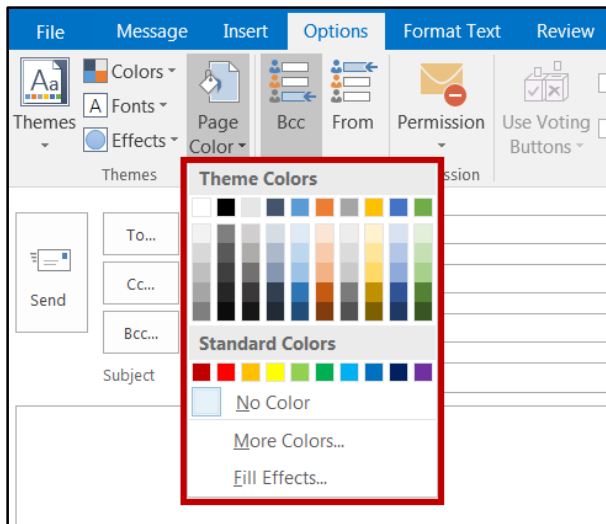


Figure 16 - Color Options

3. The selected background color will be applied to your email message.

To apply any other type of background

1. From the *Options* tab, click **Page Color**.

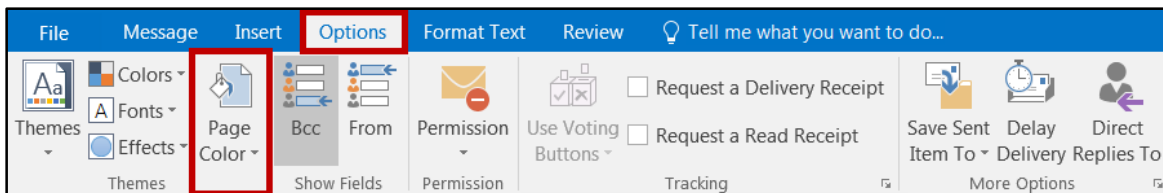


Figure 17 - Page Color

2. A dropdown menu will appear. Click **Fill Effects**.

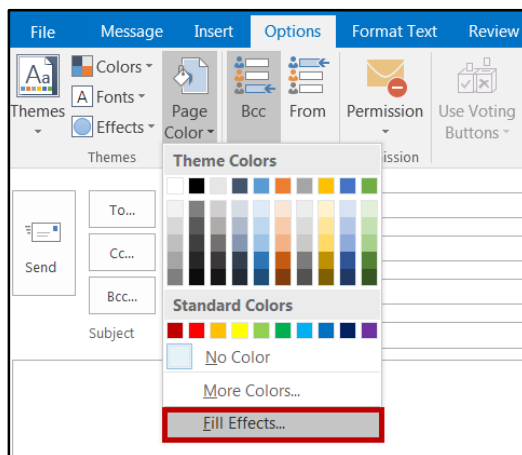


Figure 18 - Fill Effects

3. The *Fill Effects* window will appear. Under the *Gradient* tab, click **one color**.

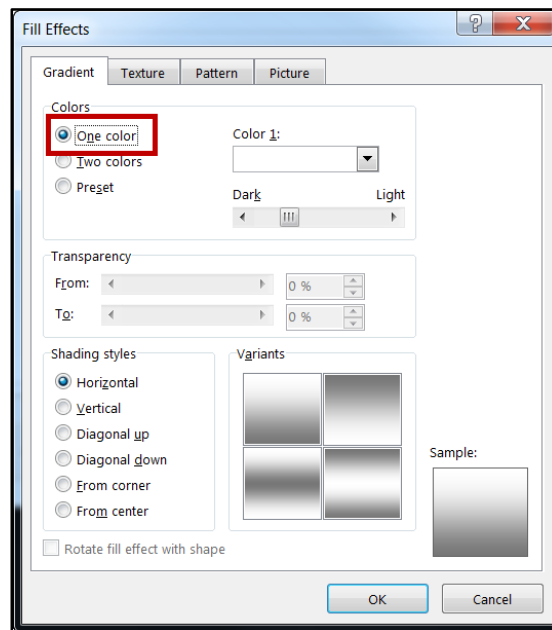


Figure 19 - One Color Gradient Fill

4. From the dropdown under *Color 1*, select a **Color**.

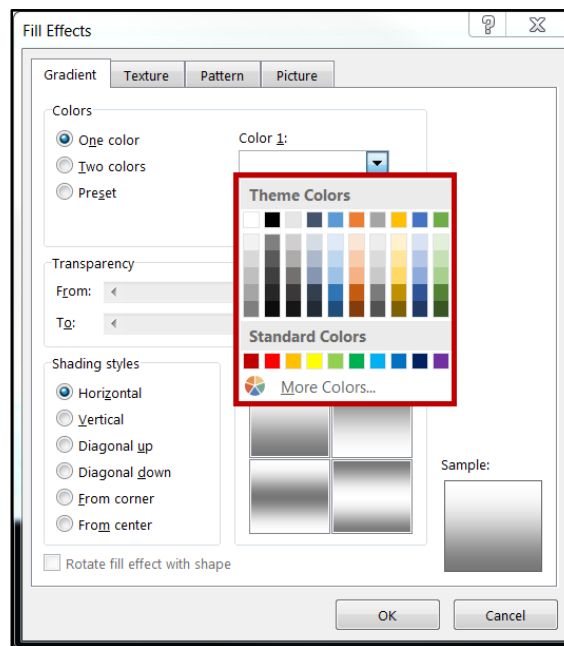


Figure 20 - Select a Color

5. Click the **OK** button. The gradient fill effect has been added to your message.

To insert a picture as a background

1. From the *Options* tab, click **Page Color**.

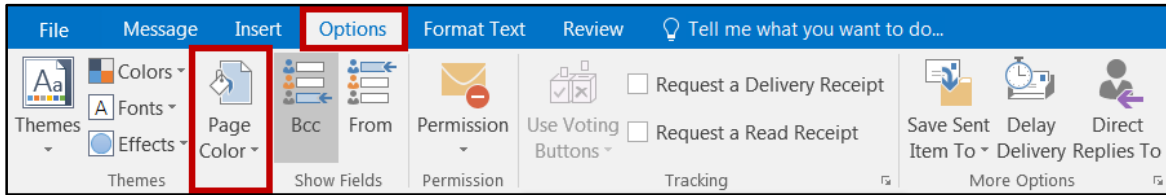


Figure 21 - Page Color

2. A dropdown menu will appear. Click **Fill Effects**.

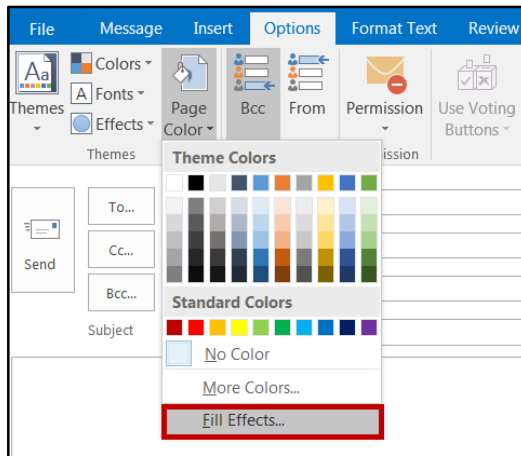


Figure 22 - Fill Effects

3. The *Fill Effects* window will appear. Click the **Picture** tab.

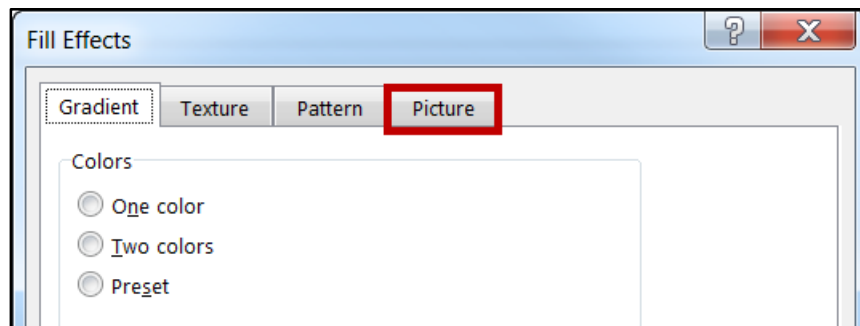


Figure 23 - Picture Tab

4. Click the **Select Picture** button.

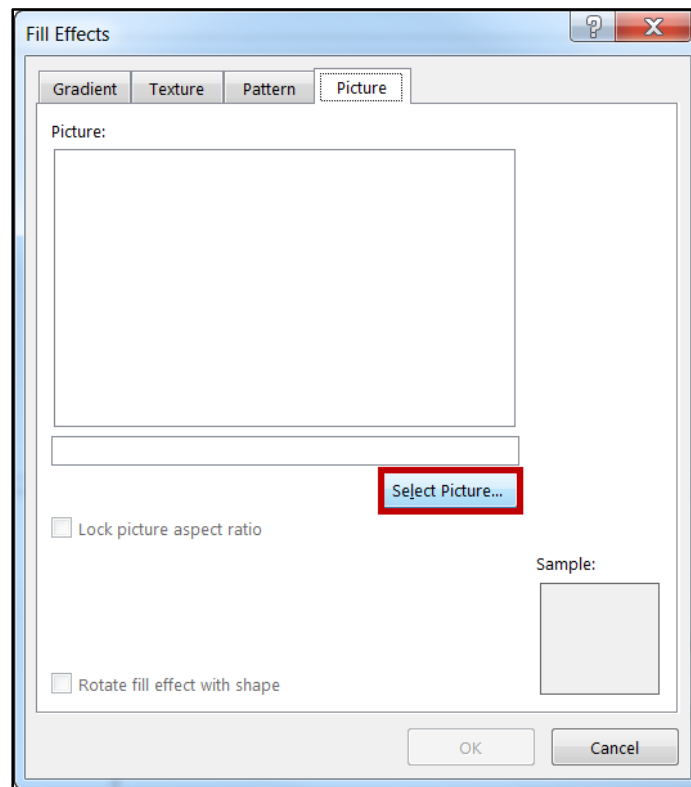


Figure 24 - Select Picture

5. The *Insert Pictures* window will open. Next to *From a file*, click **Browse**.

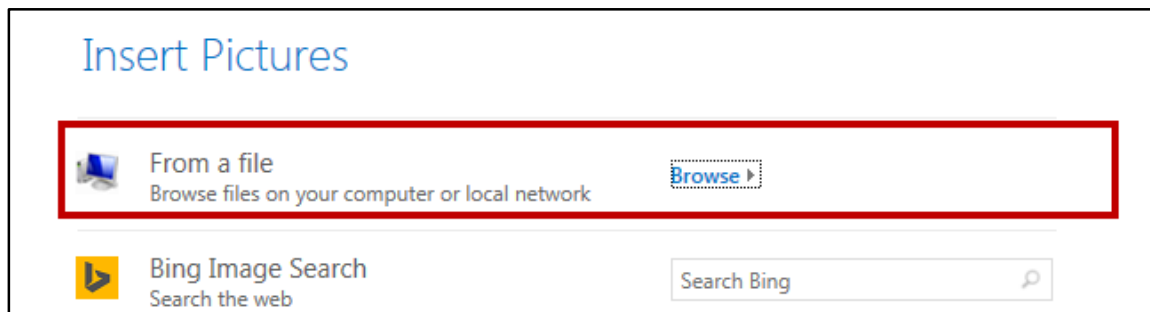


Figure 25 - Insert Pictures

6. Select a picture from your computer, and click the **Insert** button.

7. A preview will appear under *Picture*. Click **OK** to apply the background.

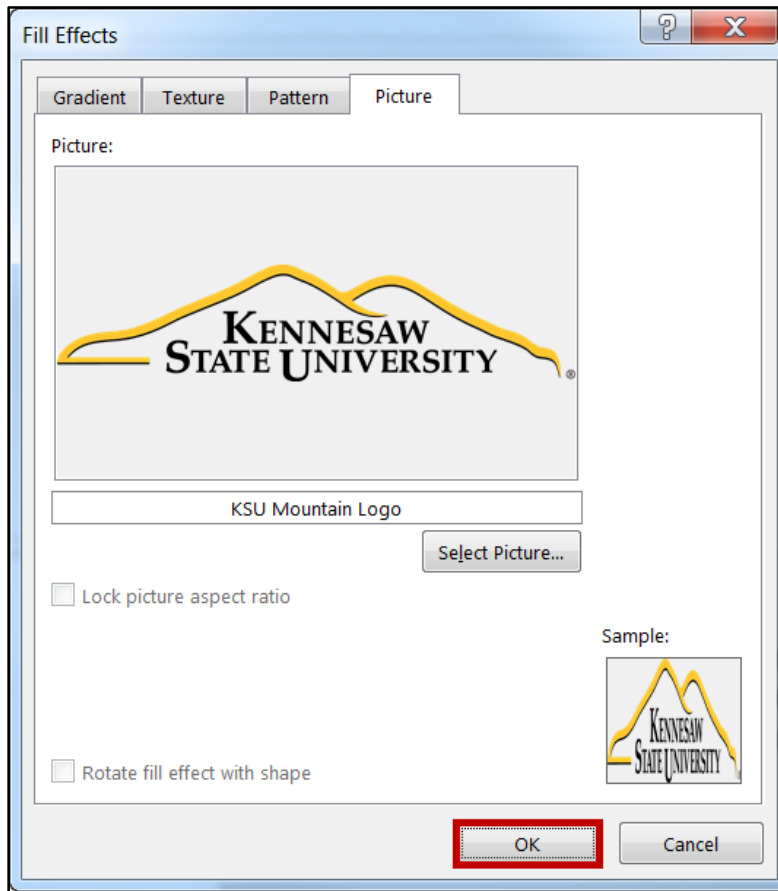


Figure 26 - Picture Background

Proofing your Message

Outlook 2016 is set to automatically check your message as it is being typed for misspellings and grammar errors. Any misspelled words will be underlined in red, while grammar errors will be underlined in blue (See Figure 27). To correct a misspelled word:

1. Right-click the misspelled word or grammar error.

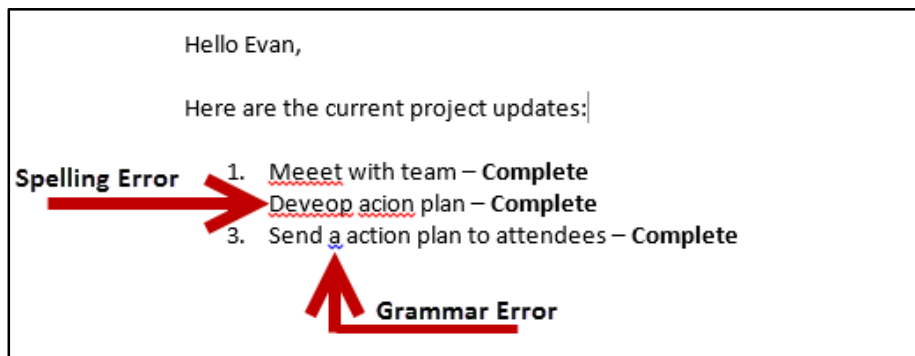


Figure 27 - Underlined Errors

2. A menu will appear with spelling suggestions. Click the **correct spelling** or **grammar** to apply it to your message.

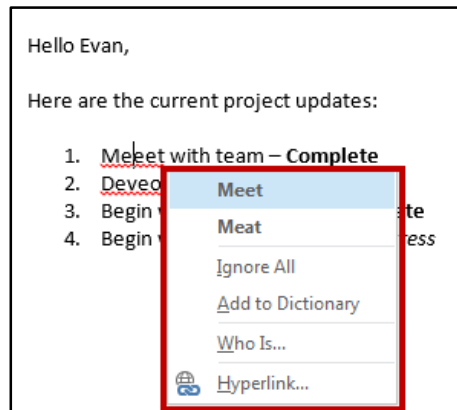


Figure 28 - Select the Correct Spelling

Adding New Words to the Dictionary

Sometimes, *Outlook 2016* will mark unrecognized words as misspelled. If the spelling is correct, you can choose to add the word to the dictionary so *Outlook 2016* will recognize the word in the future.

1. Right-click the **unrecognized word**.
2. A menu will appear with spelling suggestions. Click **Add to Dictionary** to add the word to *Outlook's* dictionary.

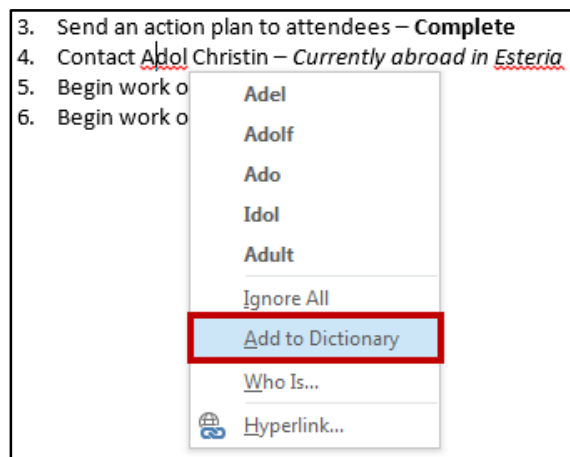


Figure 29 - Add Word to the Dictionary

Attachments

In Outlook 2016, you can attach files to an email message, as well as other *Outlook* items like messages, contacts, or tasks.

To attach a file:

1. From the *Insert* tab in the *Include* grouping, click **Attach File**.

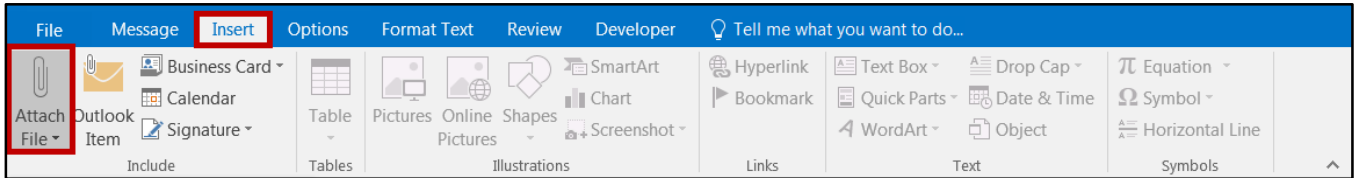


Figure 30 - Attach File

2. A drop-down box appears with your most recently used files. Click any **file** in the list to attach to your message. If the file you want to attach is not listed in recent files.
3. Click **Browse This PC...** to access files stored on your computer.

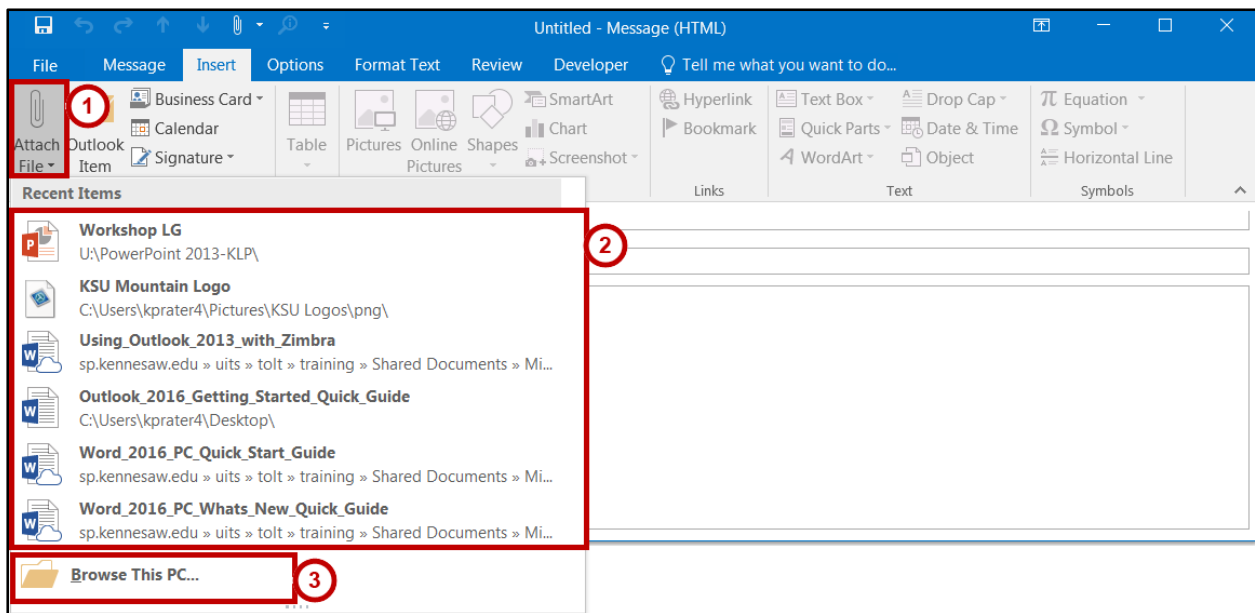


Figure 31 - Select File to Attach

4. The file will be attached to your message.



Figure 32 - File Attached

Note: You can also drag the file from your computer onto the body of your email to attach.

To attach another message or appointment:

1. From the *Insert* tab in the *Include* grouping, click **Outlook Item**.

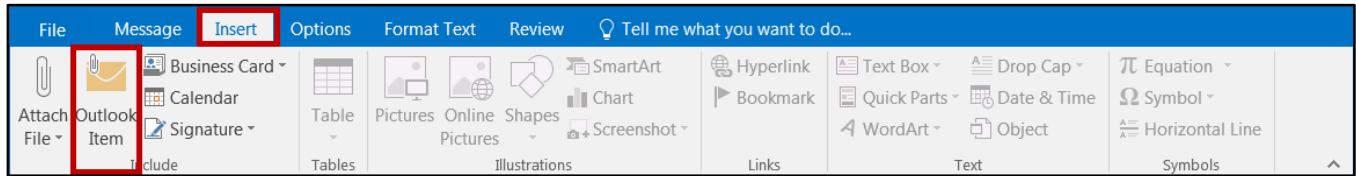


Figure 33 - Outlook Item

2. The *Insert Item* window will appear and display your *Zimbra* mail folders and appointments. Select a **folder** from under the *Look in* field, and select an **email** from the *items* section.

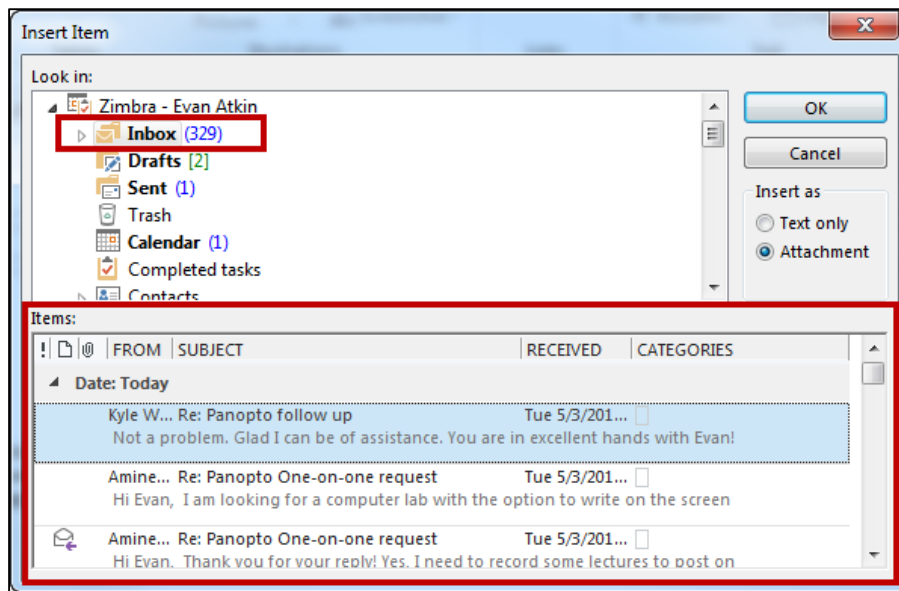


Figure 34 - Insert Item Window

3. Under *Insert as*, select **Text only** (inserts only text from the selected email) or as **Attachment** (attaches the original email as a downloadable file, along with any attachments included in the original email).
4. Click the **OK** button.
5. The selected message or appointment will be added to your email.

Creating Signatures in Outlook

1. Click the **File** tab.
2. The *backstage view* will open. Click **Options**.

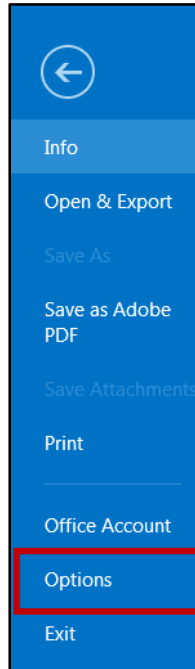


Figure 35 - Access Outlook 2016 Options

3. The *Outlook Options* window will open. Select **Mail** from the list on the left and click the **Signatures** button.

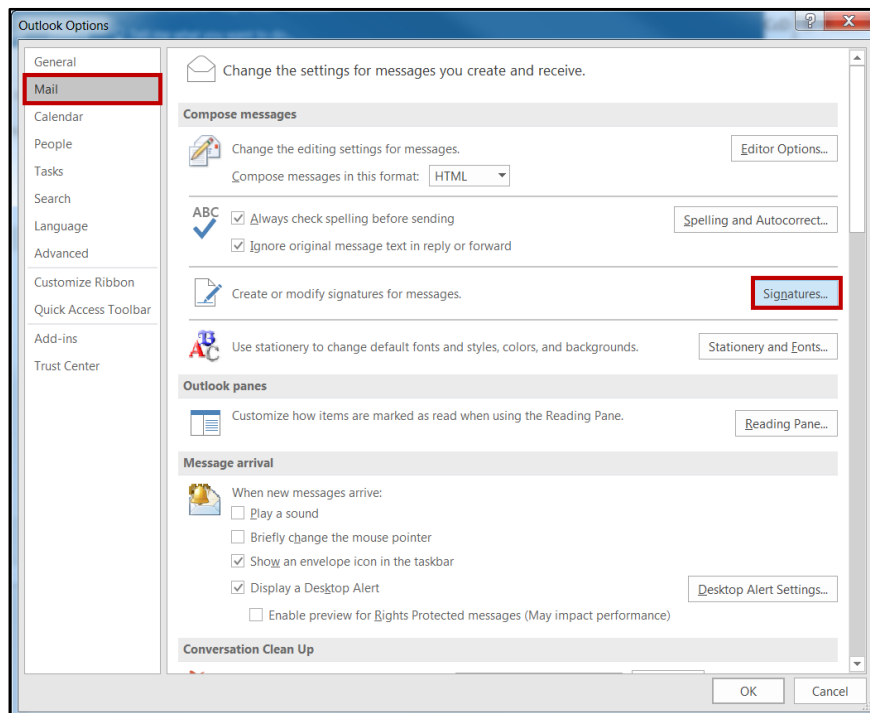


Figure 36 - Outlook Options

4. The *Signatures and Stationery* window will open. From the *E-mail Signature* tab, click the **New** button.

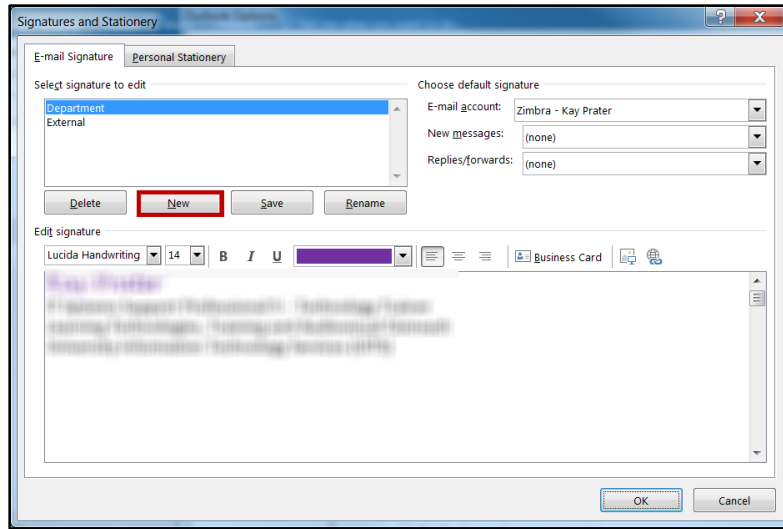


Figure 37 - Signatures and Stationery Window

5. The *New Signature* window will open. Type a name for your new signature and click **OK**.
6. You will be returned to the *E-mail Signature* tab. Click in the **Edit signature** area and type your signature as you want it to appear (see Figure 38).
7. Click the **Save** button (see Figure 38).
8. Select the signature you want to use as the default from the drop-down lists for your *New Messages* and *Replies/forwards* (see Figure 38).
9. Click the **OK** button to exit the *Outlook Options* screen (see Figure 38).

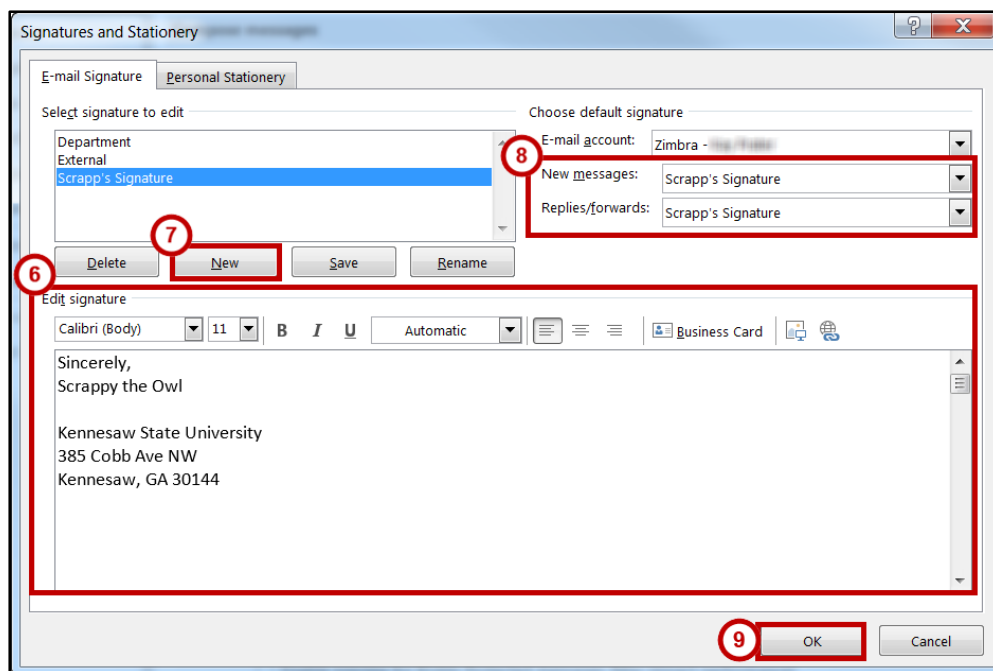


Figure 38 - Edit Signature

Setting Message Importance Level

To mark an outgoing email message as *high priority*:

1. While composing an email message, make sure you are on the *Message* tab.
2. Click **High Importance** in the Tags group.

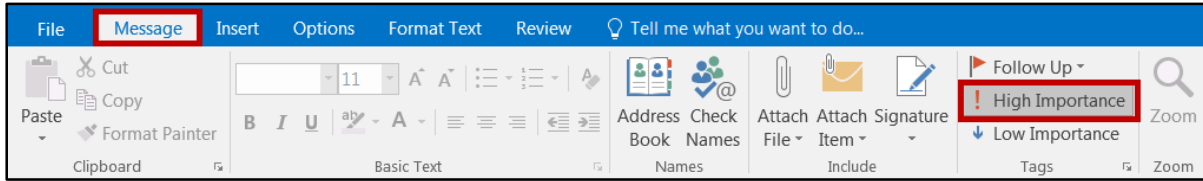


Figure 39 - High Importance

Delay Message Delivery

Outlook allows you to delay delivery of a message until a particular date and time. However, in order for the message to be sent out at the scheduled time, Outlook must be running.

1. In the *Message* window, click the **Options** tab (see Figure 40).
2. In the *More Options* group, click **Delay Delivery** (see Figure 40).

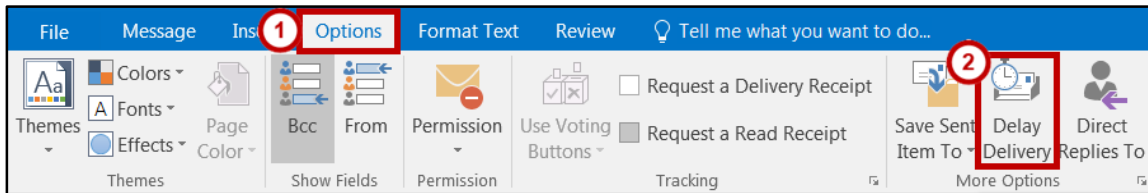


Figure 40 - Delay Delivery

3. The *Properties* window opens. In the *Delivery options* section, check the **Do not deliver before** checkbox (see Figure 41).
4. Enter the **date and time** after which you want the message delivered (see Figure 41).
5. Click the **Close** button (see Figure 41).

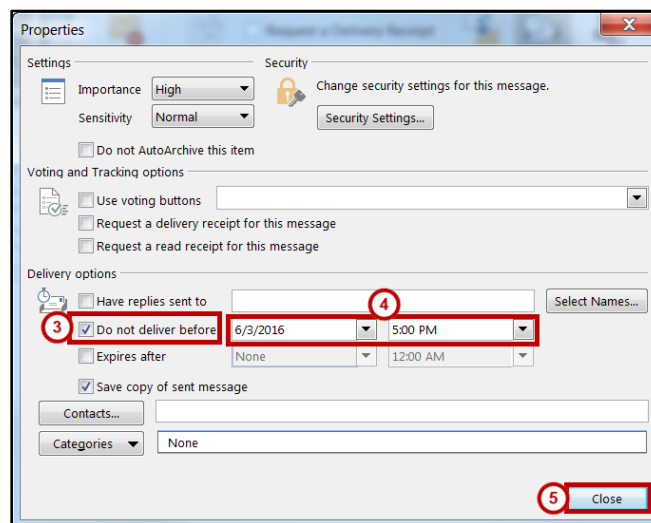


Figure 41 - Set Delayed Delivery Date/Time

- Continue drafting your email. When finished, click **Send**. The email will be sent out after your set delayed delivery date expires.

Note: Outlook must be running at the time the delivery is scheduled in order for the message to be sent out.

Saving a Message as a File

Both sent and received messages can be saved as files.

- Locate and left-click the **message** to save.
- Click the **File** tab.
- Click **Save As**.
- The *Save As* window opens. Select a **location** on your computer to save your email message.
- In the *Save as type* field, choose **one** of the following options (see Figure 42):

Text Only	Saves the message as a .txt file. Does not save formatting, embedded pictures, or attachments. Can be easily opened and does not require Outlook to view.
Outlook Template	Saves the message as an Outlook Template
Outlook Message Format	Saves the message as an Outlook file and saves all formatting, embedded pictures, and attachments. Requires Outlook to open.
Outlook Message Format – Unicode	Default option. Saves the message as an Outlook file with Unicode support. and saves all formatting, embedded pictures, and attachments. Requires Outlook to open.
HTML	Saves the message as an HTML file with an accompanying folder. Saves all formatting and embedded pictures, but no attachments. Opens with default web browser. Requires the .HTML file and HTML Folder in order to view the message. .
MHT Files	Saves the message as an MHT file. Saves all formatting and embedded pictures, but no attachments. Support varies between browsers, but Internet Explorer is default. Saved as a single file.

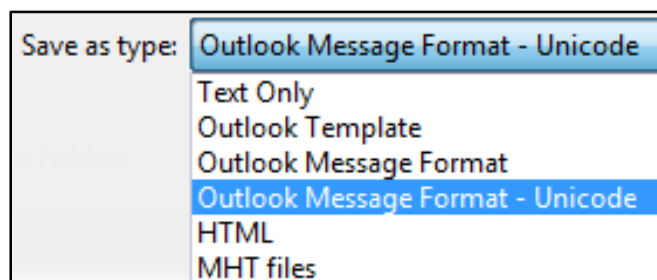


Figure 42 - Save As Type

- Click **Save** to save your message.

Tell Me and Smart Lookup

The **Tell Me** dialog box lets you enter keywords and phrases related to what you want to do next to quickly access features or actions. It can also be used to look up helpful information related to the topic. It is located on the *Menu bar*, above the *Ribbon*. The following explains how to use the *Tell Me* functionality.

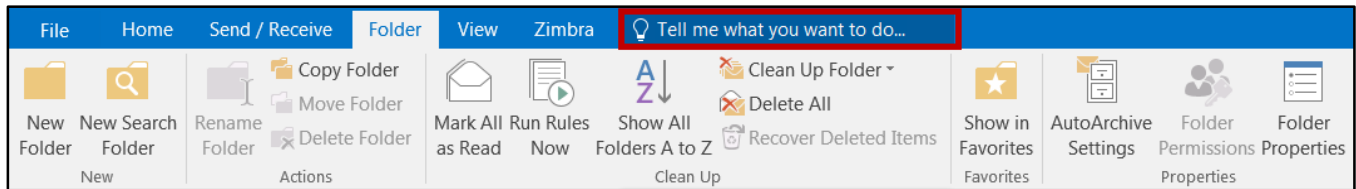


Figure 43 - Tell Me Dialog Box

1. Enter a **keyword or phrase** into the dialog box to view a list of commands and features.
2. A drop-down list of options for selection appears based on the topic entered.

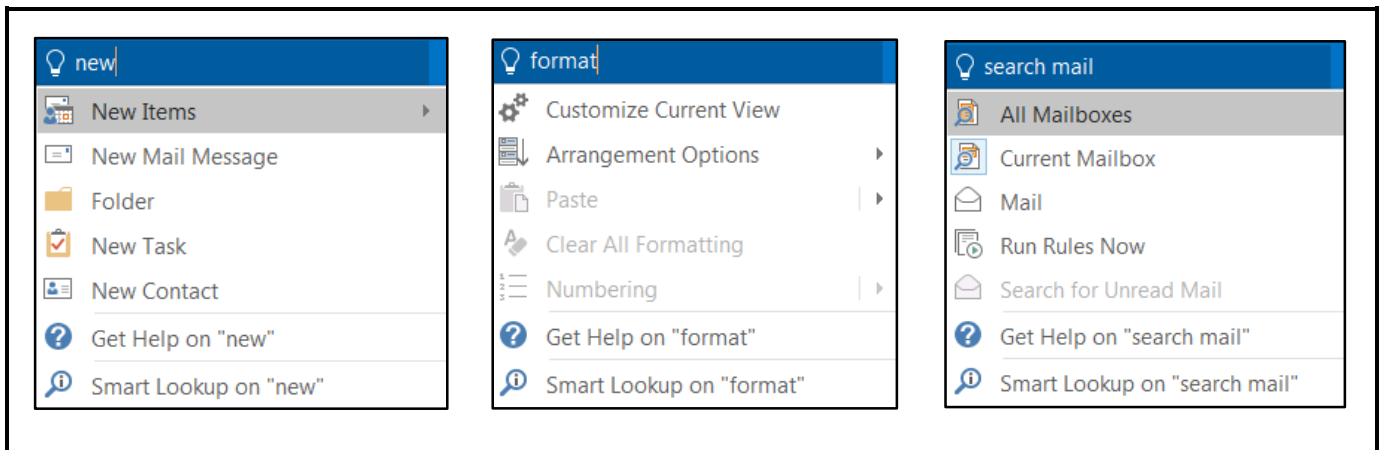


Figure 44 – Examples of Tell Me Searches

3. Click the command or function you want to use. For this example, click **New Mail Message**.

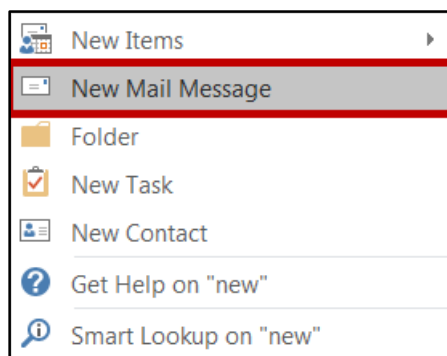


Figure 45 - New Mail Message

4. Outlook will open a *New Mail* dialog box.

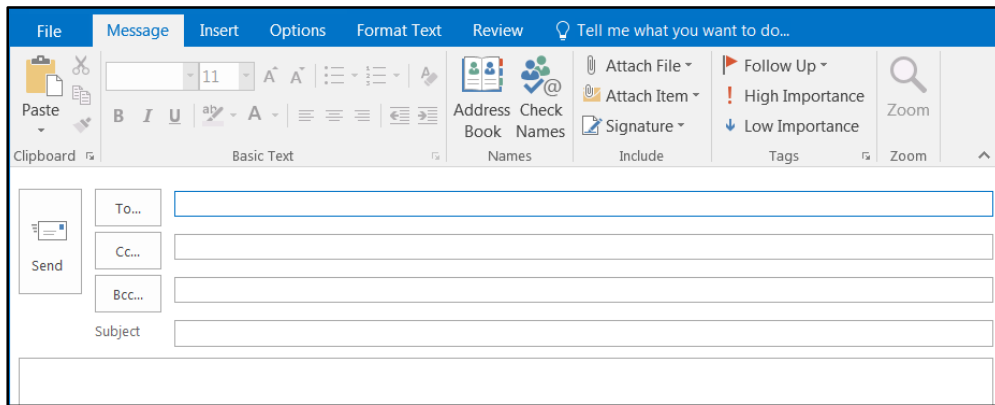


Figure 46 - New Mail Message

5. At the bottom of the drop-down list, there are also buttons to **Get Help** from Microsoft (see Figure 47) and **Smart Lookup** (see Figure 47) to provide access to helpful articles, links, pictures, and definitions from the Web.

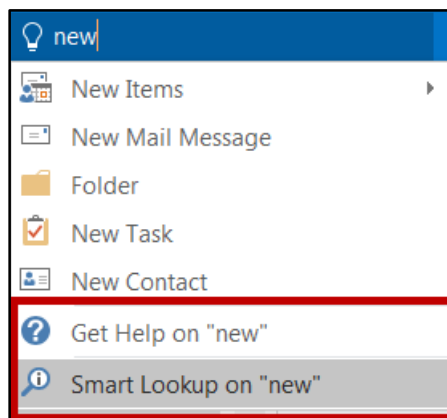


Figure 47 - Get Help Display

The Smart Lookup Tool

Smart Lookup uses *Bing* to provide you with search results for your selected term or phrase. It is located under the *Review* tab within the *Insights* section. The following explains how to use the *Smart Lookup* functionality.

1. Highlight the **word or phrase** you want to find information about.
2. Right-click the **word or phrase**.
3. Click Smart Lookup.
4. The *Insights* pane displays the information relevant to your selection.

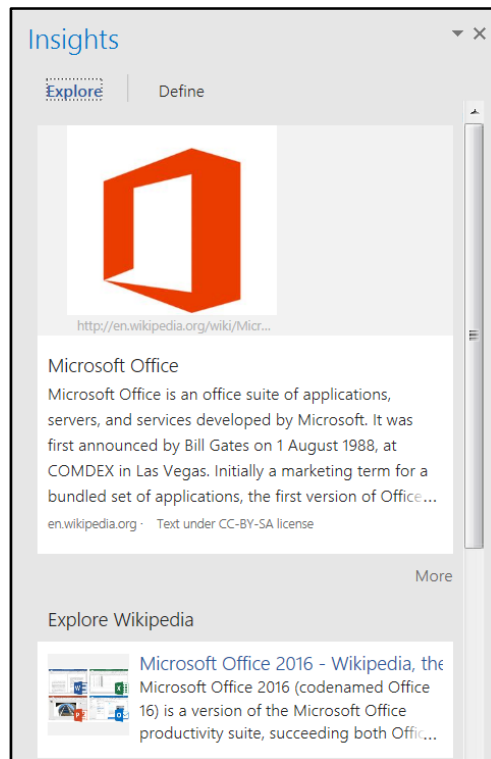


Figure 48 - Smart Lookup

5. To close the *Smart Lookup Insights* pane, click the **Exit (X)** button in the top right corner of the pane.



Figure 49 - Exit Smart Lookup Insights Pane

Accessing the Calendar

To view the *Calendar*, click the **Calendar** tab in the Navigation Bar.

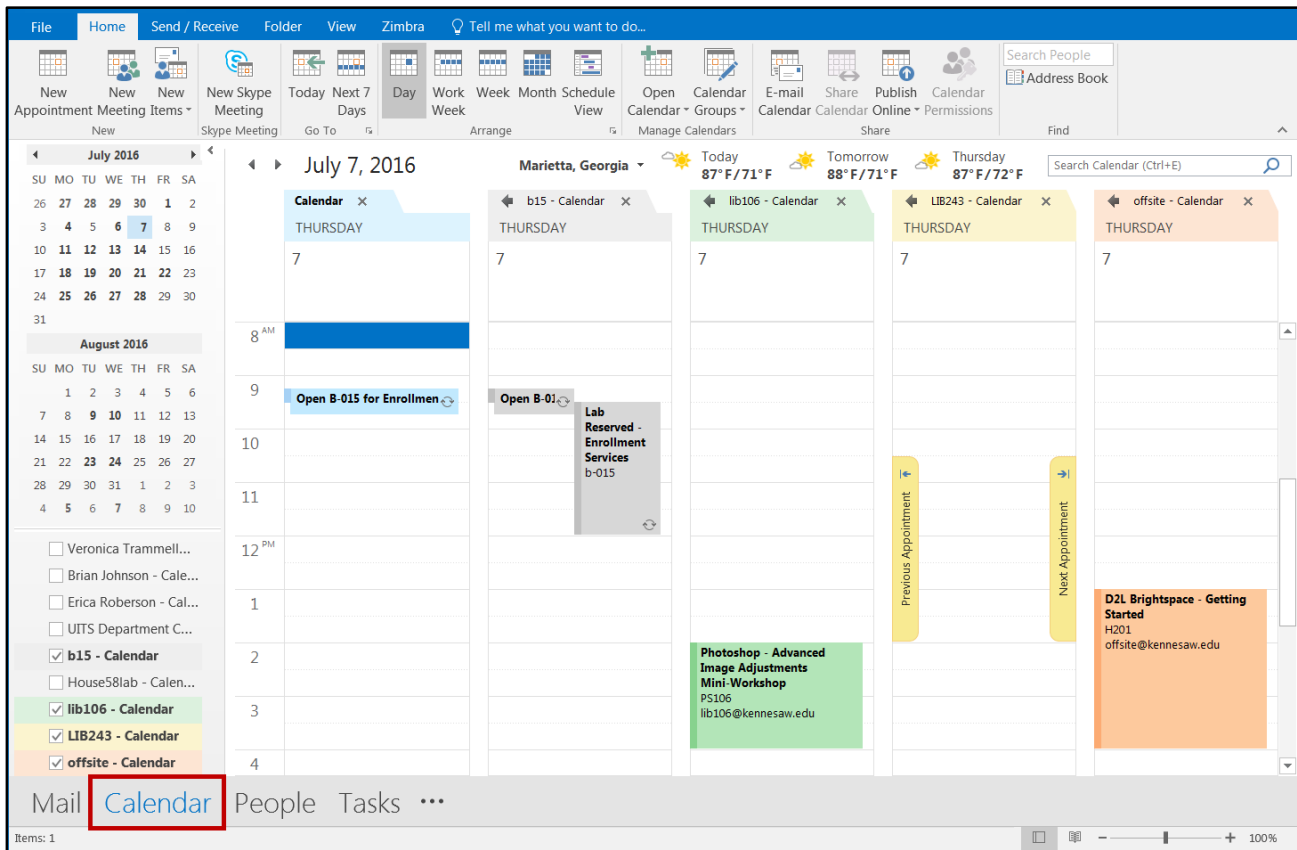


Figure 50 – Calendar

Creating an Appointment

1. Within the *Calendar* view on the *Home* tab, click **New Appointment**.

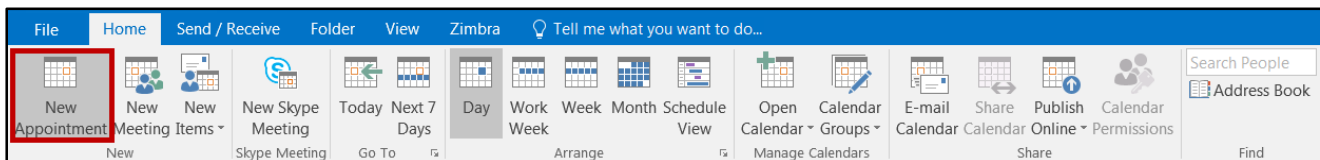


Figure 51 - New Appointment

2. The *Appointment* window will open. Enter the appointment information in the **Subject**, **Location**, **Start/End time** fields.

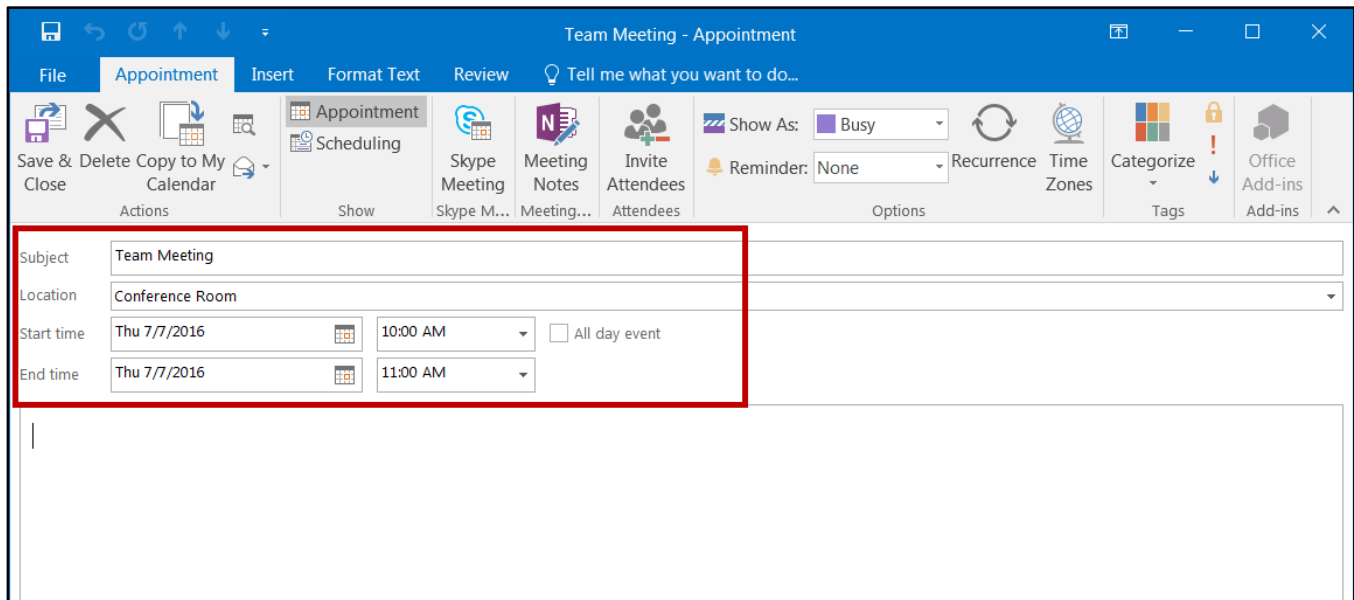


Figure 52 - Edit Appointment Information

3. Under the *Appointment* tab in the *Options* grouping, select how you would like to display the status of the appointment in the Calendar from the **Show As** drop-down list (see Figure 53).
4. Within the *Options* grouping, select the **Reminder notification** time from the drop-down list (see Figure 53).
5. Click **Save & Close** to create the appointment (see Figure 53).

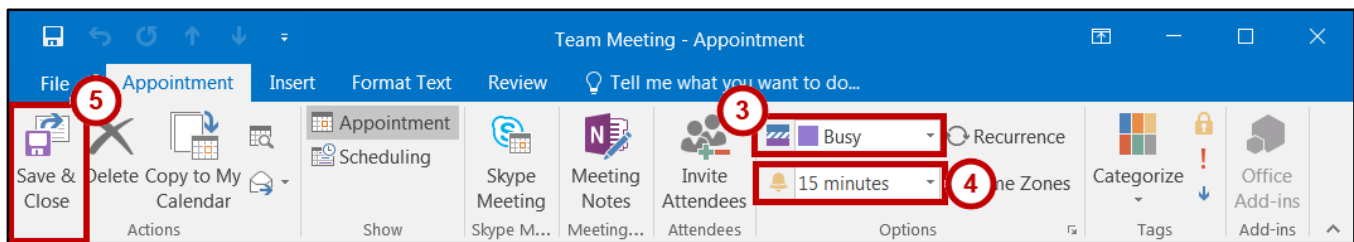


Figure 53 - Additional Appointment Settings

Creating a Recurring Appointment

1. Follow steps 1-4 in the *Creating an Appointment* section.
2. Under the *Appointments* tab in the *Options* group, click **Recurrence**.

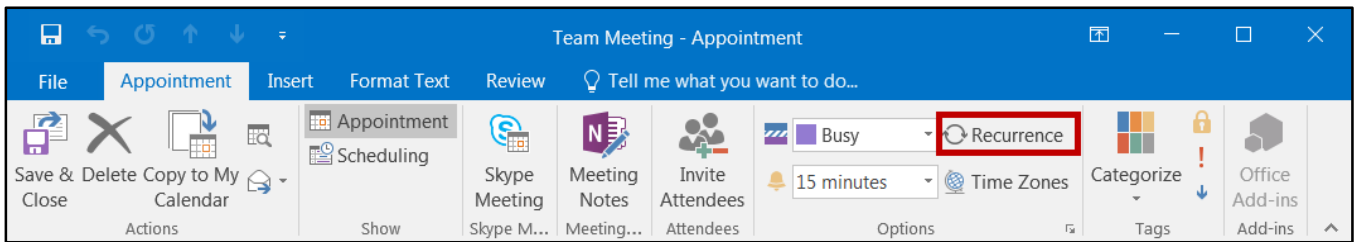


Figure 54 - Click Recurrence

3. The *Appointment Recurrence* window appears. Set the **Appointment time**, **Recurrence pattern**, and the **Range of recurrence**.

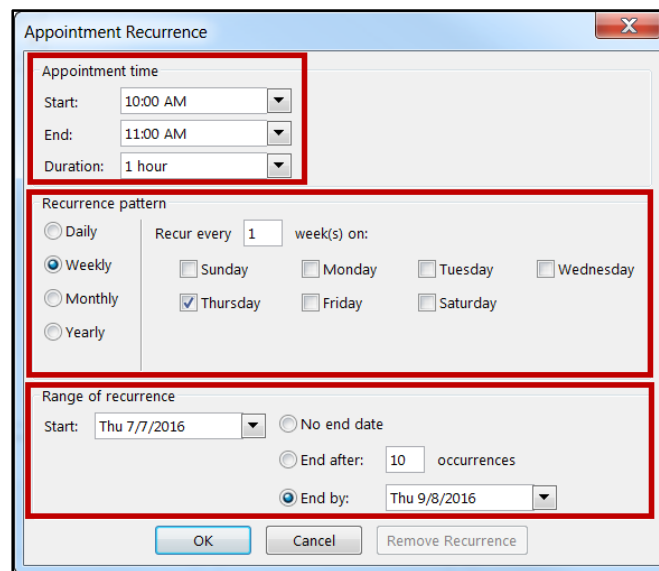


Figure 55 - Appointment Recurrence

4. Click the **OK** button.
5. The recurrence will be set and displayed under the *Location* field on the appointment.

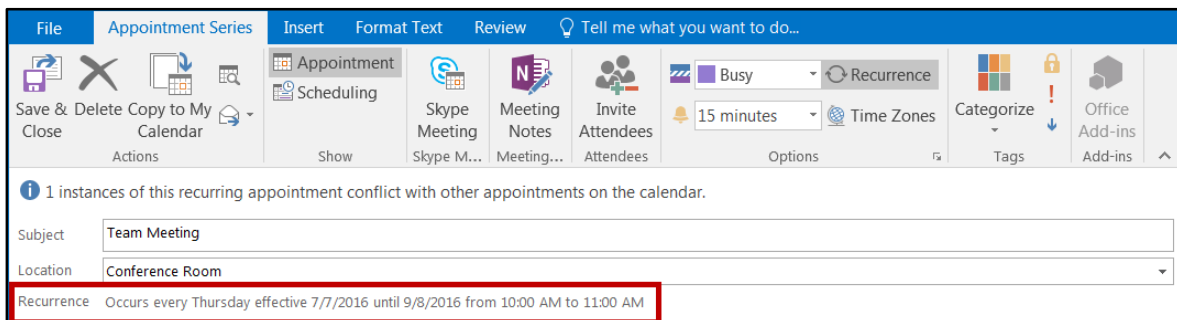


Figure 56 - Recurrence Set

6. Click the **Save & Close** button.

Scheduling a Meeting

The *Invite Attendees* feature allows you to send an appointment invitation via email to people that you want to attend a meeting.

1. Follow steps 1-4 in the *Creating an Appointment* section.
2. Under the *Appointments* tab in the *Attendees* group, click **Invite Attendees**.

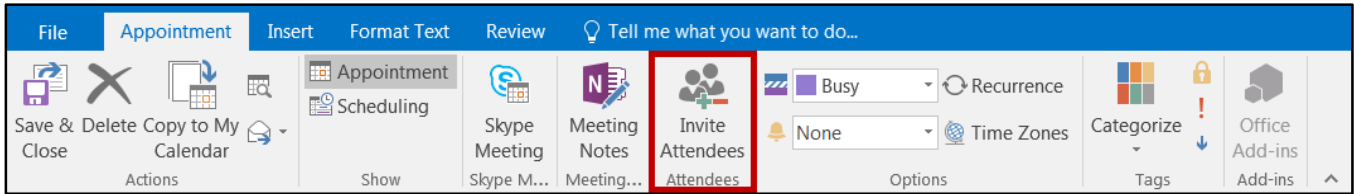


Figure 57 - Invite Attendees

3. A *From* and *To:* field will be added to the appointment. Click **To...**
4. The *Select Attendees and Resources* window will appear. In the search field, type in the name of an **attendee**.

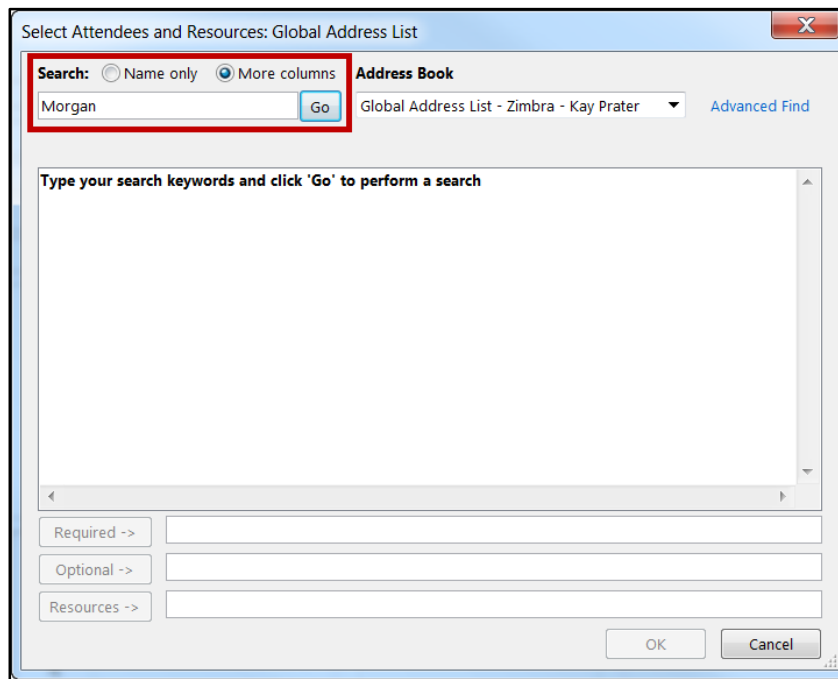


Figure 58 - Select Attendees and Resources

Note: If the recipient is a KSU employee, make sure the *Global Address List – Zimbra Collaboration* is selected under *Address Book*.

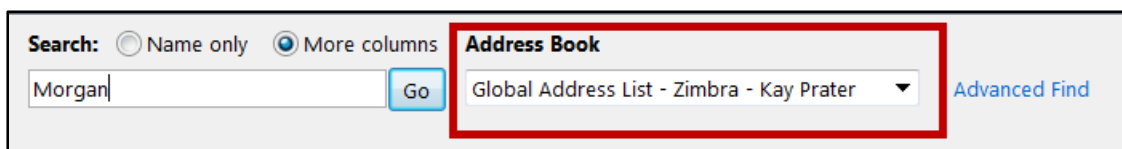


Figure 59 - Global Address List Selected

5. Click the **Go** button to run your search.

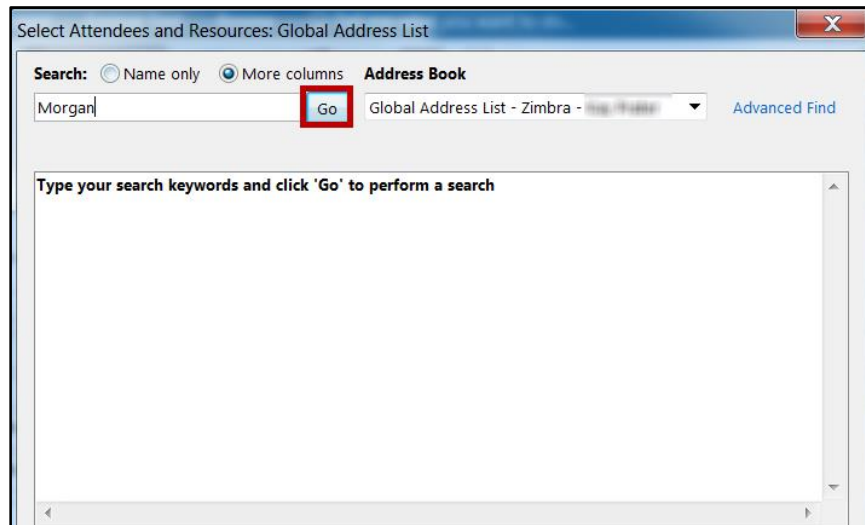


Figure 60 - Conduct Search

6. A list of names will appear. Select the recipient(s) and click the **Required**, **Optional**, or **Resources** button to add your attendee(s) to your appointment.

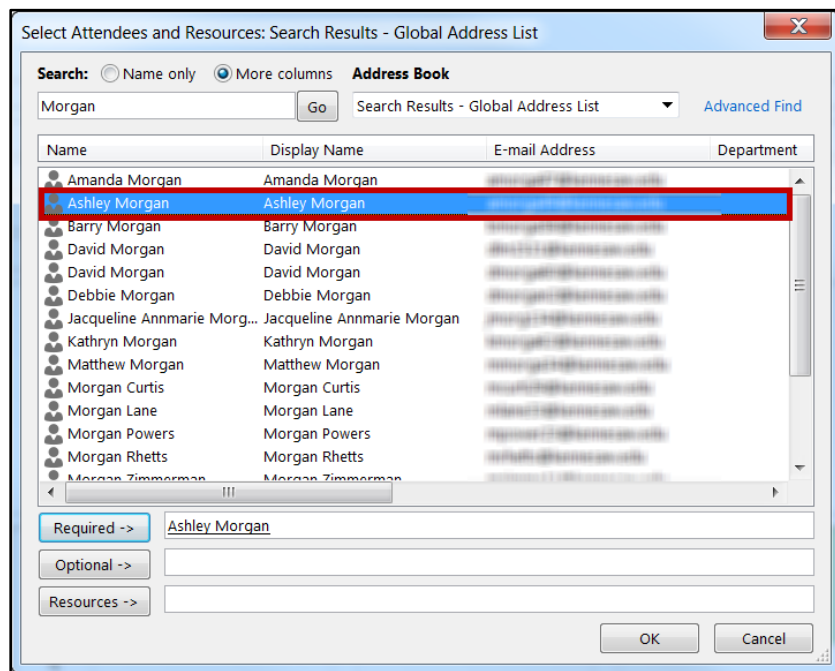


Figure 61 - Add Recipient to Email

Note: Double-clicking on the recipient(s) name will automatically add it in the **Required** field.

7. Repeat steps 4-6 if you need more names.
8. Click **OK** when you are done adding names.

9. You will be returned to the *Appointment* window and your recipients will be added to your appointment.
10. Click **Scheduling** in the *Show* group to check the schedules of the prospective attendees and see if they are available at the time of the meeting (see Figure 62).
11. In the *Scheduling* area, you will see the name of each attendee and their status during the time of the meeting (see Figure 62).
12. If necessary, you can change the date and/or time of the meeting on this screen (see Figure 62).
13. Click the **Send** button to send the appointment invitation email.

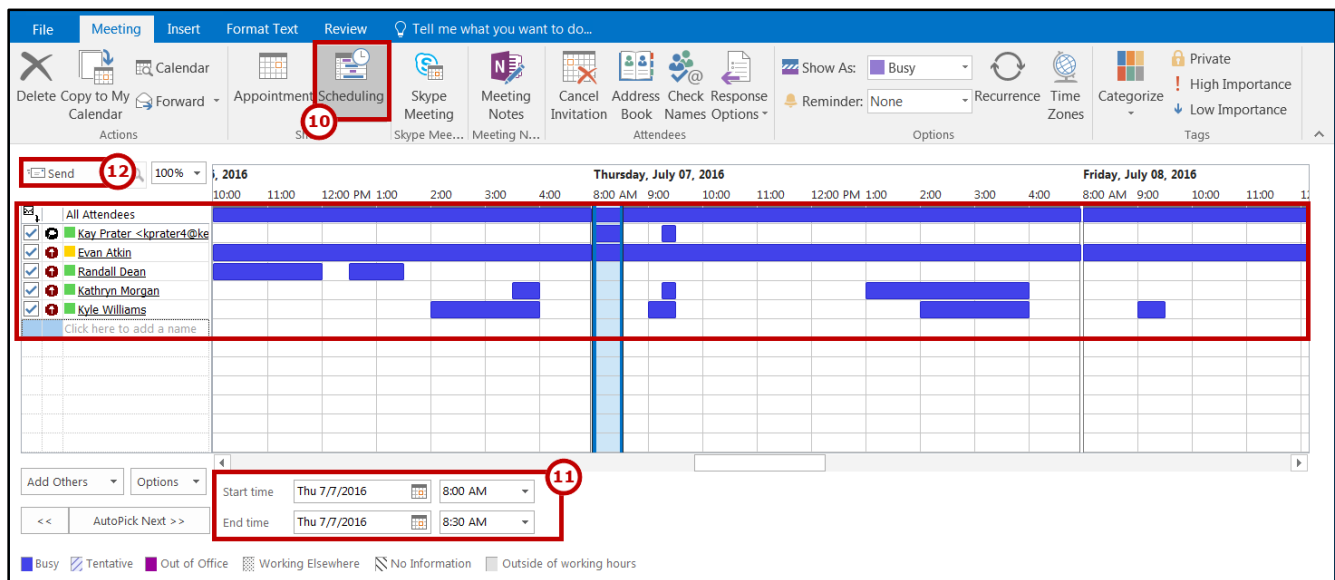


Figure 62 - Scheduling

New E-mail Notifications

Depending on your configuration, *Outlook 2016* may show an alert on your desktop, and display an envelope icon in the Windows taskbar, whenever new e-mail, meeting requests, or other items arrive. You can customize the *Desktop Alert Settings* from the *Outlook Options* screen.

1. Click the **File** tab.
2. Click **Options**. The *Outlook Options* screen appears.

3. Click **Mail** (see Figure 63).
4. Under the *Message Arrival* section, click the **checkboxes** of the events that you wish to occur when new messages arrive (see Figure 63).
5. To further adjust the *Desktop Alert* display, click **Desktop Alert Settings...** (see Figure 63).

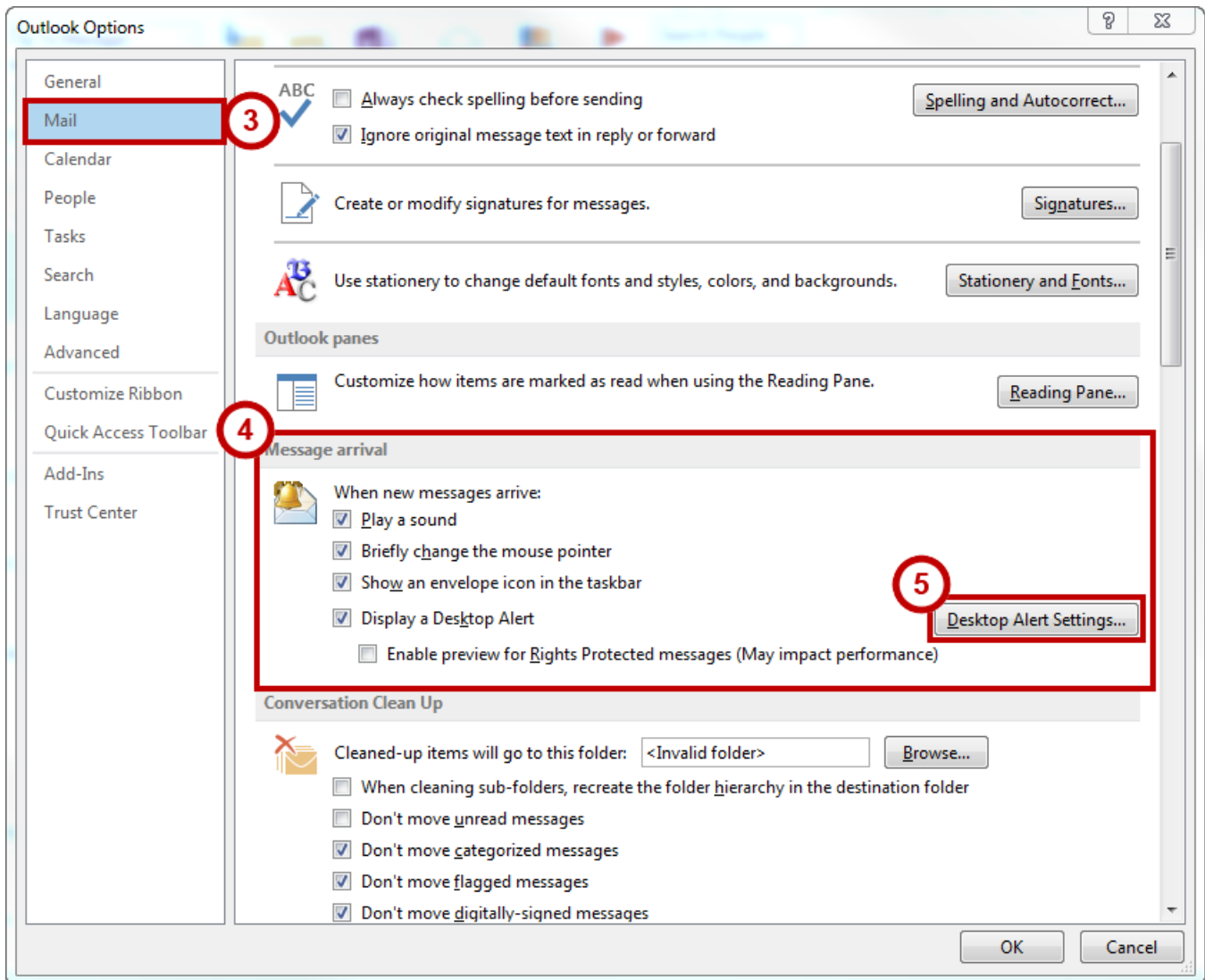


Figure 63 - Message Arrival Alert Settings

Note: The *Desktop Alert* is a small notification that is displayed in the lower-right corner of your screen when a new message is received.

Automatically Archiving Emails

AutoArchive is turned off by default. To adjust the *AutoArchive* settings to automatically archive an email folder:

1. Click the **folder** you would like to archive. (e.g. Inbox).
2. Click the **Folder** tab (see Figure 64).
3. In the *Properties* grouping, click **AutoArchive Settings** (see Figure 64).

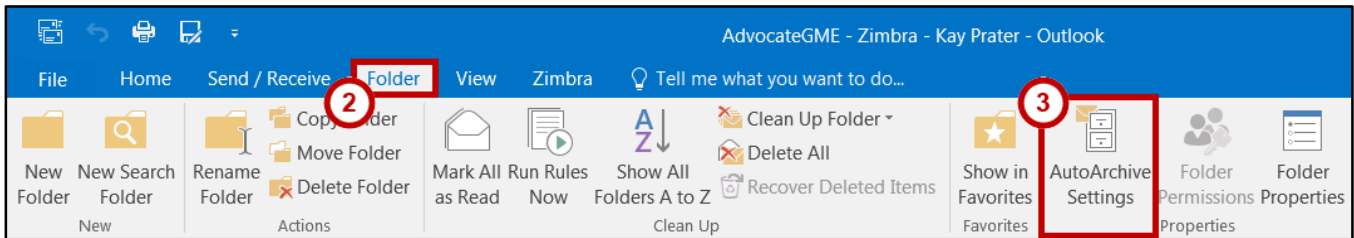


Figure 64 - AutoArchive Settings

4. The Folder Properties screen appears. Select **Archive this folder using these settings:** (see Figure 65).
5. Next to *Clean out items older than*, enter a **time** (see Figure 65).
6. Select **Move old items to:** (see Figure 65).
7. Click **Browse...** (see Figure 65)
8. The *File Explorer* window will open. Select a location on your computer to store your Outlook archive and click **OK**.
9. Click **Apply** (see Figure 65).
10. Click **OK** (see Figure 65).

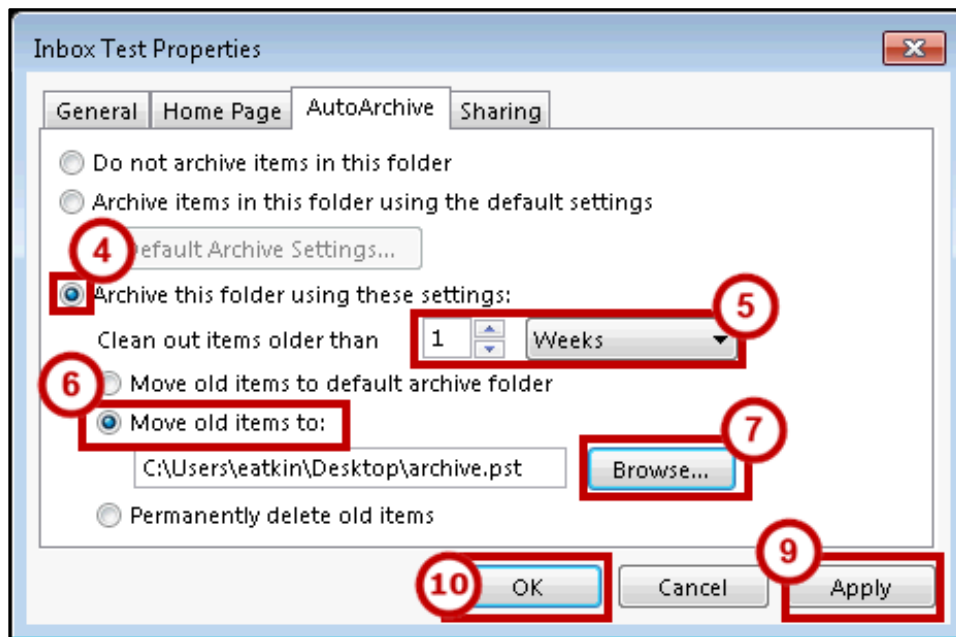


Figure 65 - Set Up AutoArchive

Manually Archive Emails

To manually archive an email folder in *Outlook*:

1. Click the **File** tab
2. The *Backstage view* opens to the *Info* tab. Click **Mailbox Cleanup** (see Figure 66).
3. From the *drop-down* menu, click **Archive...** (see Figure 66).

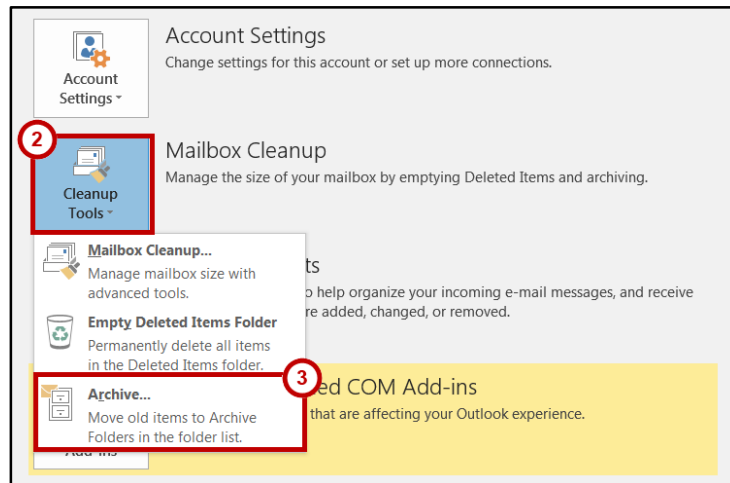


Figure 66 - Cleanup Tools and Archive

4. The *Archive* screen appears. Make sure **Archive this folder and all subfolders** is selected (see Figure 67).
5. In the *folder view*, select a **folder** you wish to archive (see Figure 67).
6. In the *Archive items older than* field, set a **date** (see Figure 67).
7. If you want to change the location of your archive file, click the **Browse** button, and then navigate to the location you want (see Figure 67).
8. Click the **OK** button (see Figure 67).

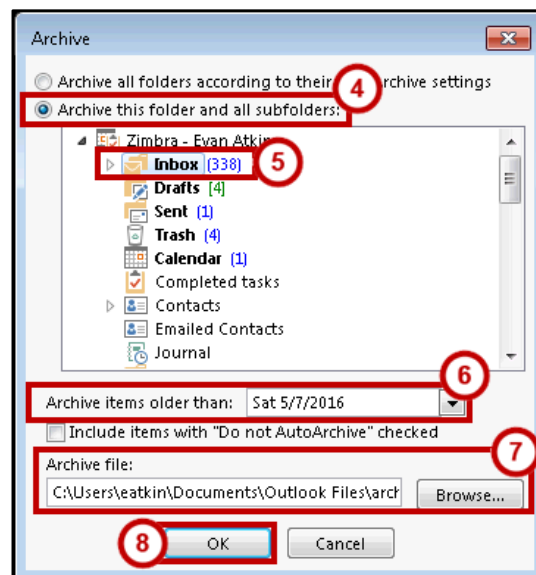


Figure 67 - Choose Manual Archive Settings

9. Exit *backstage view* and return to your email. In your Folder List, you will now see an entry called *Archives*.

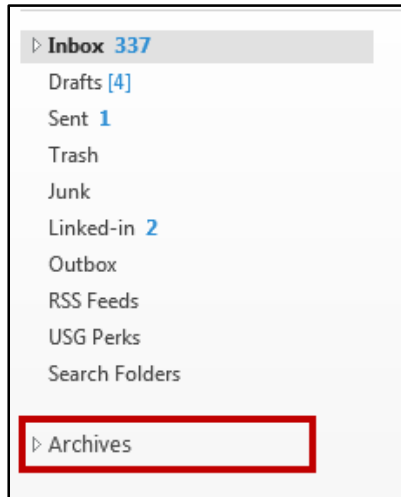


Figure 68 - Archives Added to Folder List

10. Click the arrow next to the *Archives* folder to expand the folder list and reveal any folders that you have archived. The existing folder structure of your mailbox will be maintained and you can move individual items in and out of archived folders by dragging and dropping.

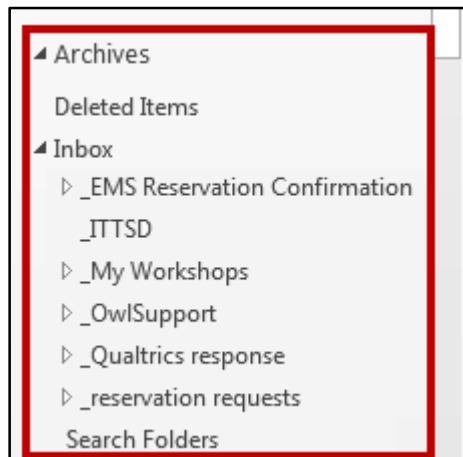


Figure 69 - Archive Folder Structure

Additional Help

For additional support, please contact the KSU Service Desk:

KSU Service Desk for Faculty & Staff

- Phone: 470-578-6999
- Email: service@kennesaw.edu
- Website: <http://uits.kennesaw.edu>