

# Communicating and getting organised with Outlook

**Course objective:** know how to use the messaging system (Outlook) offered at Université Lumière Lyon 2. This course should allow you to be independent in the advanced use of your messaging application, to manage your messages, your contacts, to schedule a meeting and to share a calendar.

## Course outline:

<b>1</b>	<b>General information</b>	<b>2</b>
<b>2</b>	<b>Webmail or email client?</b>	<b>2</b>
<b>3</b>	<b>Configuring Outlook</b>	<b>3</b>
<b>4</b>	<b>Outlook webmail interface</b>	<b>4</b>
<b>5</b>	<b>Composing an email message</b>	<b>8</b>
5.1	Digital identity	8
5.2	Netiquette	8
5.3	Creating and sending a message	9
5.4	Replying to an e-mail	15
<b>6</b>	<b>Organising your emails</b>	<b>16</b>
<b>7</b>	<b>Managing contacts: managing your contacts, creating and managing contact groups, importing and exporting contacts</b>	<b>17</b>
7.1	Creating a contact	17
7.2	Creating a contact list	19
7.3	Editing or deleting contacts	21
<b>8</b>	<b>Collaborating</b>	<b>22</b>
8.1	Scheduling a meeting	23
8.2	Sharing a calendar	28
<b>9</b>	<b>Conclusion</b>	<b>32</b>

## 1 General information

Electronic messaging is a tool for exchanging messages (electronic mail or e-mail) through an electronic mailbox identified by an e-mail address. Communication is asynchronous.

This tool can be presented as software installed locally (mail client or Outlook application installed on your computer) or as a web application (webmail).


## 2 Webmail or email client?

Here are some elements that will help you decide whether your use of your email account is more suitable for webmail or whether it is better to use an email client application (comparison based on:

<https://www.arobase.org/softs/webmail-ou-logiciel.htm>)

	<b>Webmail</b>	<b>Email client</b>
<b>Setting</b>	Immediately operational, there is no configuration to perform.	Email account(s) to configure.
<b>Access to messages</b>	You must be connected to the Internet. Some webmails allow you to activate an offline mode (Outlook).	The messages received are stored on the hard drive; you can access them without an Internet connection. You have the option of preparing messages for sending, which will take place the next time you connect to the Internet.
<b>User-interface</b>	Fairly simple, suitable for new internet users.	Complex, but all the controls and settings are accessible in a few clicks
<b>Formatting messages</b>	Simple	Elaborate
<b>Multiple accounts</b>	A single account is managed (a single email address)	Allows the use of multiple email accounts

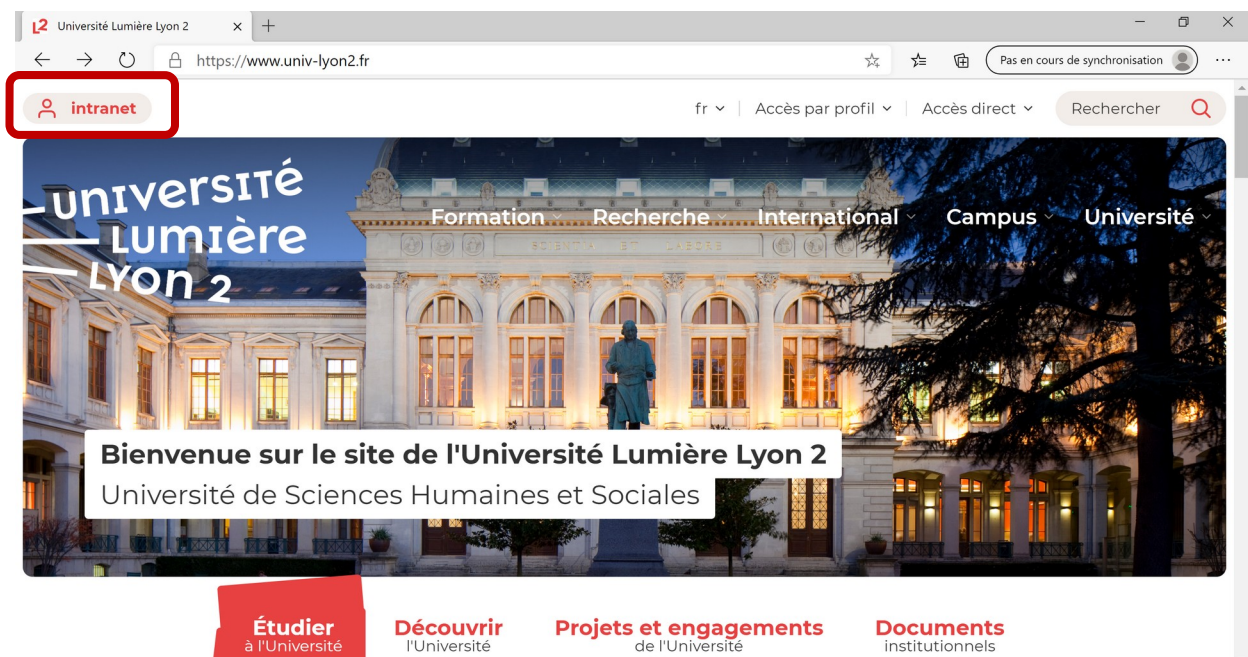
### 3 Configuring Outlook

To view your e-mail messages with webmail, there is nothing to configure. You can use it right away with your Lyon2 account by going to the address <https://applis.univ-lyon2.fr/> and clicking on the **Mail**  icon:

If you decide to install the Outlook application on your computer, just follow these steps:

- Install Office 365 on your computer (the Outlook application is included);
- Configure the Outlook application on your computer.

On the [University's website](#), in the **Intranet** (see the login button at the top left of the screenshot below):



Consult the article “Office 365 Free Education” (<https://www.univ-lyon2.fr/numerique/office-365-education-gratuit>): “As a member of the Lyon 2 community, for the duration of your studies, your contract and/or your assignment at the University, you can benefit for free, on a private basis, from the Office 365 Education offer”. This document also specifies the steps to follow to use and/or download Office 365.

The Outlook email client is part of the Office 365 suite. Once the email client is installed on your computer, you have a setup wizard that starts automatically the first time you launch the Outlook application. You will

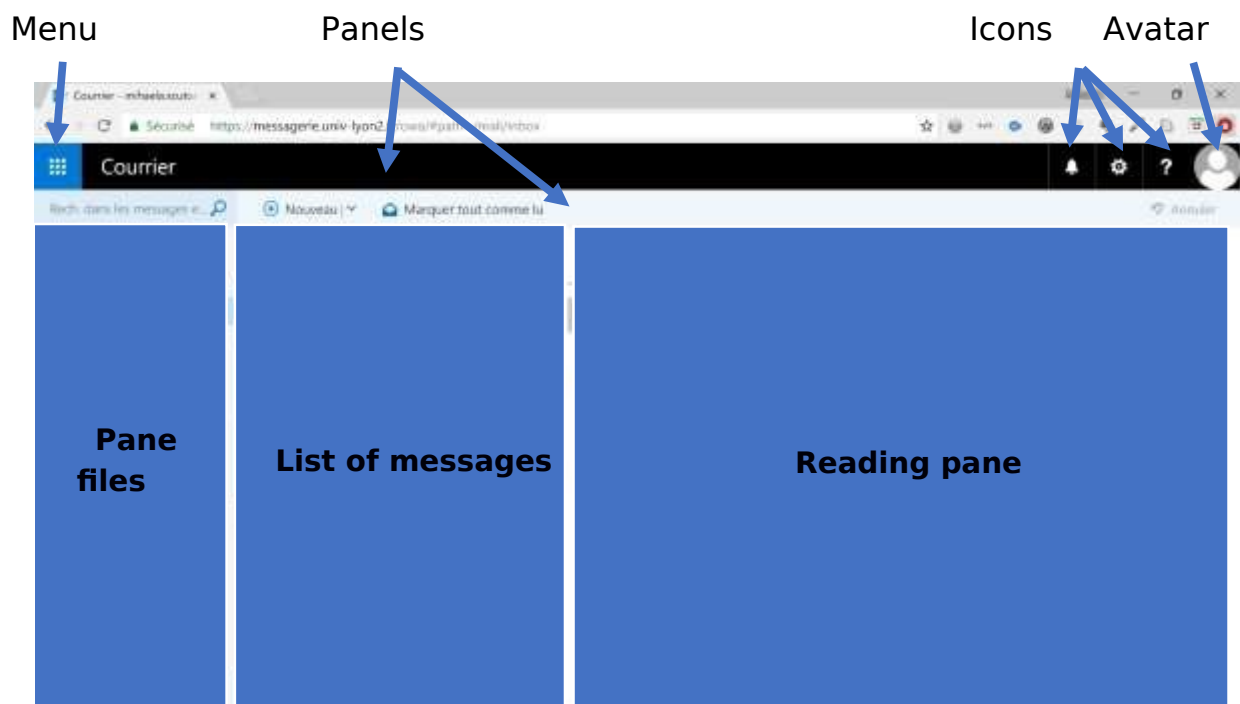
find the configuration steps by consulting the “Configure Outlook on my computer” page (<https://www.univ-lyon2.fr/numerique/parametrer-outlook-sur-mon-ordinateur>).

The remainder of this document deals with the use of webmail, because it allows you to access your messages from anywhere, on any computer or tablet with a web browser.

If you want to go further in using the mail client — which offers more options, you will find more tutorials on Outlook mail (also available on the site <https://support.microsoft.com>) regroupés sur cette page : <https://www.univ-lyon2.fr/numerique/messagerie-outlook>.


## 4 Outlook webmail interface

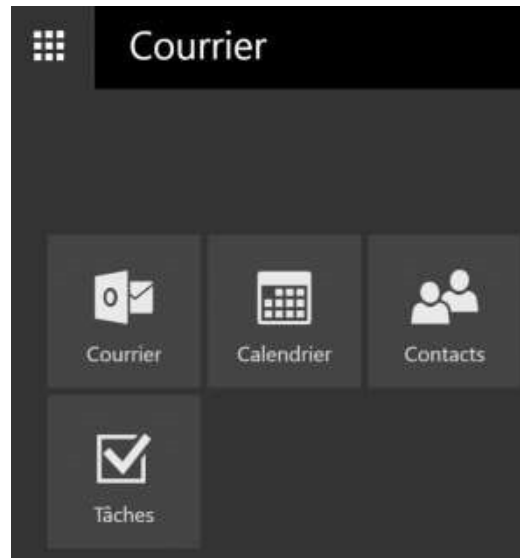
Once logged in to Webmail, the interface looks like this:






The interface contains:

- Two **panels** at the top of the window,
- The **folders pane** on the left,
- The **list of messages** in the middle,
- The **reading pane** on the right.

In the first panel, at the top left, is the **menu**  that provides access to the different modules of the web application: **Mail**, **Calendar**, **Contacts** and **Tasks**.



The menu is part of a first panel containing the name of the current module (Mail by default) and several icons:


- Notification 
- Options 
- Help 
- The avatar...

The avatar is an image the user chooses to represent him/her in the digital



work environment. By default, it looks like this:

By clicking on the avatar you get a window containing the e-mail address, an image that you can modify by clicking on the “Modify” link and, below the image, the links to connect to another account or to disconnect:



Test Demoicom  
test.demoicom@univ-lyon2.fr

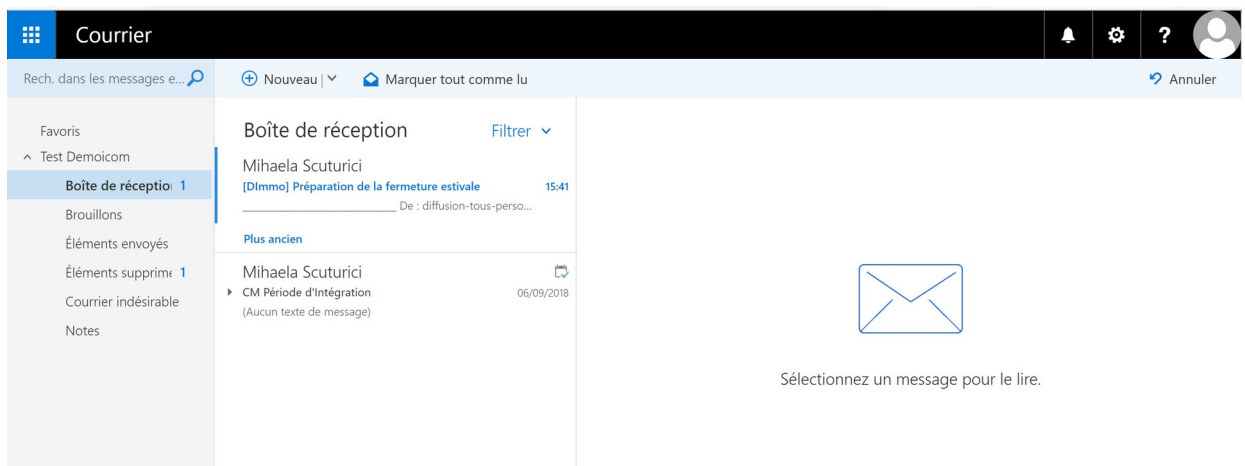
[Modifier](#)

Ouvrir une autre boîte aux lettres...

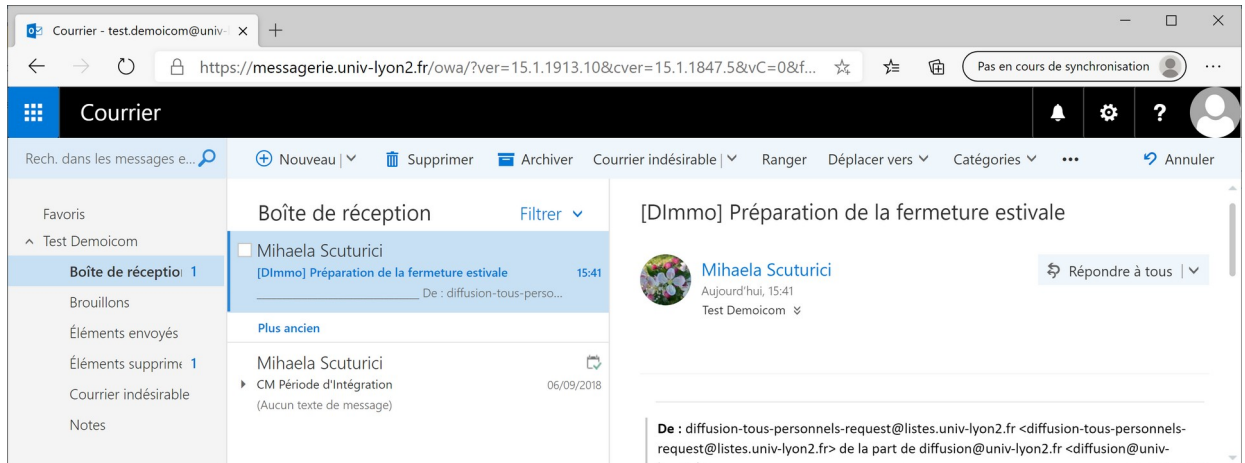
Se déconnecter

A second panel, which is below the first, contains on the left a search field specific to the module in which you are (Default **Mail**, or **Calendar**, **Contacts**, **Tasks**) and on the right a **contextual menu**. This context menu adapts depending on where you are:

- While you are in the **Inbox** (folder pane — left column) and without any message selected, there are just two options: write a new message and/or mark all messages as read.



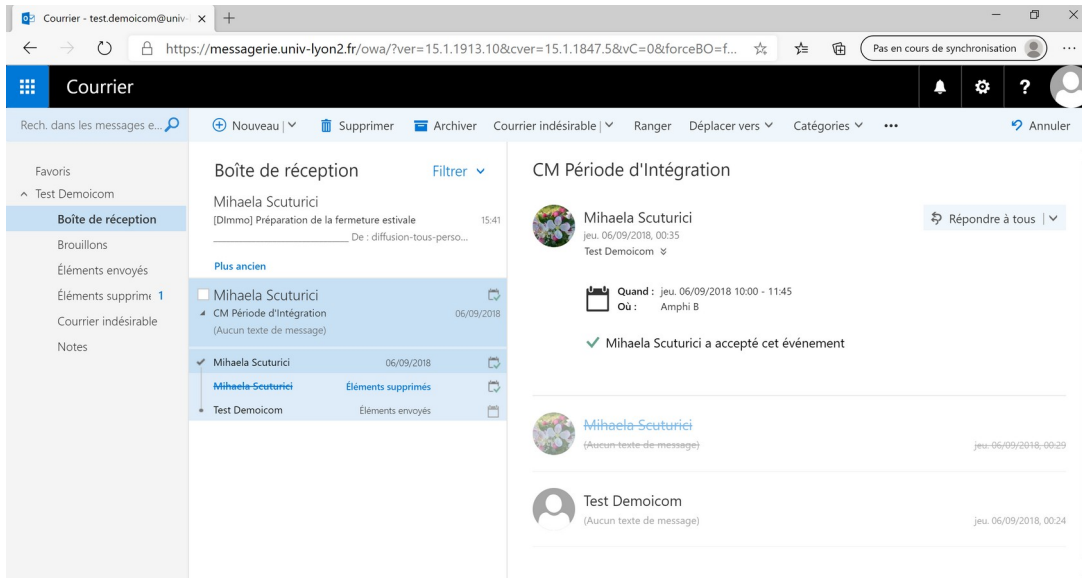
- By selecting a message from the list, you have more options in this same context menu: write a new message, delete the message, archive it, identify it as spam, etc.



Below the context menu, in the **Mail** module you will find:

- On the left, in the **Folders pane**: all email folders, i.e. inbox, drafts, sent and deleted items, folder containing junk mail, deleted messages, etc.
- Then the **list of messages** belonging to the folder which is selected in the Folders pane (here the inbox);
- On the right, in the **reading pane**, the message selected in the message list.

Attention: by default, in the message list, the messages received are organised by **conversation** thread. This means that messages from the same subject are grouped together and a small triangle to the left of the message indicates that there are multiple messages in the conversation thread. By clicking on the small triangle, you have the option to display all the messages in the conversation thread:



## 5 Composing an email message

### 5.1 Digital identity

In general, to maintain control over their **digital identity** (personal and professional), a person is supposed to choose wisely the username or email address to use according to their activity.

Depending on the context, the user can use different identifiers:

- **Professional or institutional identifiers** created by the employer and linked to their professional activity — in our case the identifiers and the email address of the University;
- **Private identifiers**, whether created at the initiative of the user to access online services for their personal use (social network, online sales, messaging, online banking, Internet service provider, etc.) or given to him/her as part of online public services (online tax declaration, etc.).

Regarding electronic messaging, **messages sent as part of your studies at the University must be sent from your Lyon 2 account.** For example, if you contact an instructor or if you are looking for an internship, you must use your Lyon 2 email address, otherwise you risk not being taken seriously or the message may not be read.

### 5.2 Netiquette

Netiquette forms part of the rules of good practice to be observed when using digital technology: when communicating on the Internet (electronic mail, forum, etc.), the user must **comply with the rules of good behaviour and courtesy.**



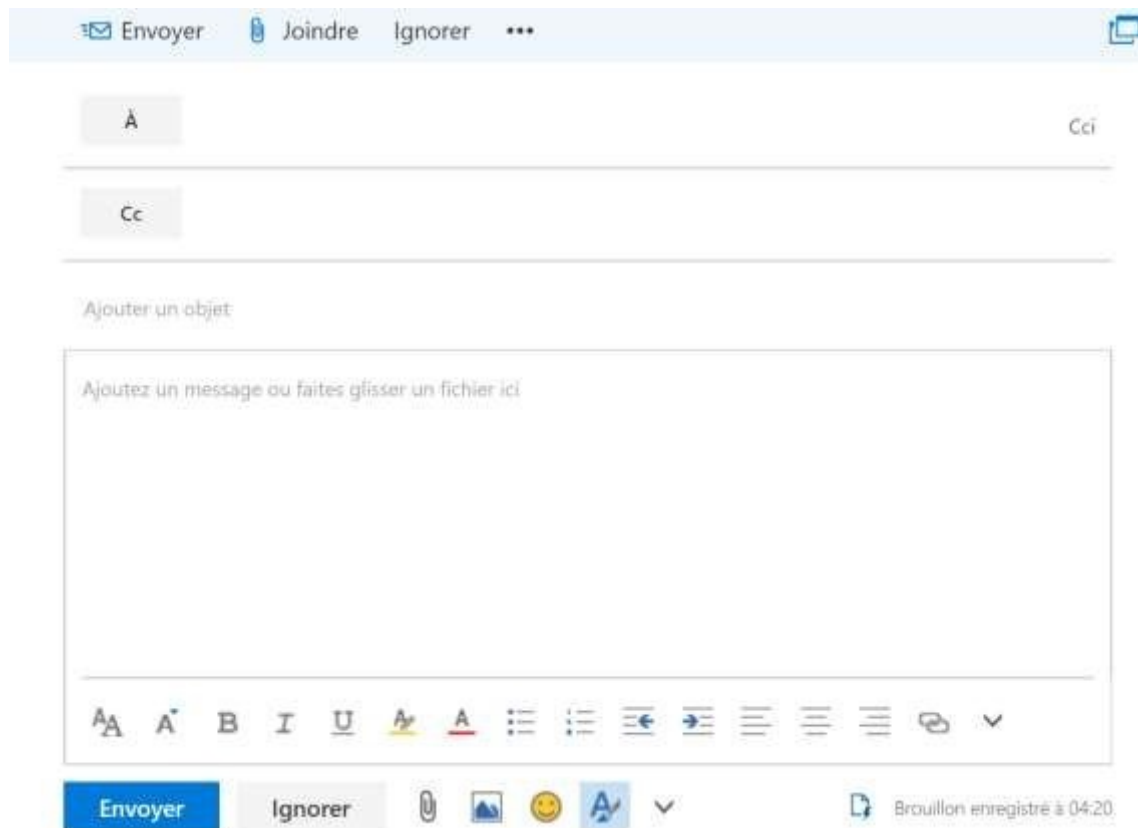
Among the rules of good behaviour regarding the use of email:

- Each email must have a subject in the header that reflects the content of the message;
- To start an electronic message, a simple “Hello” is often sufficient, but it can be replaced by “Madam” or “Mr.” depending on the importance of your contact;
- To conclude an email, use a polite phrase: a simple “Best Regards” is sufficient in most cases.
- Add a signature to your messages: you can create several versions depending on the nature of the information you want to give. As a student, you will be able to use: last name, first name, student number, year (L1, L2, etc.), component.
- Do not use capital letters, this corresponds to a cry and can be likened to aggression;
- Your message should be concise, precise and not too long;
- Consider a reasonable size for attachments (5MB is a generally acceptable limit). If you exceed this limit, compress attachments or use a file transfer service;
- If information is to be transmitted to several people who do not know each other, it is preferable to place their addresses in hidden copy (Bcc — Blind Carbon Copy or “*Cci — Copie carbone invisible*” in French).

### 5.3 Creating and sending a message

To put it simply, creating and sending an email is a three-step process:

1. Click on the “**New**” button (keyboard shortcut: the n key).



2. Add participants, a subject, and a message in the body of the email. Don't forget to sign your message.
3. Click on the “**Send**” button.

Here are some more detailed observations about the content of email messages.

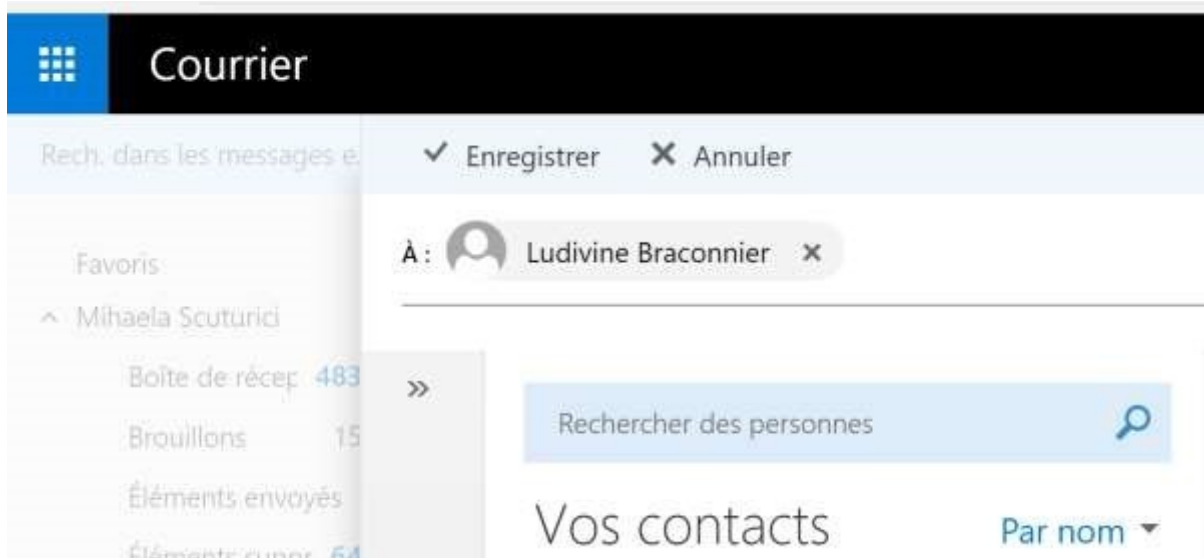
In the Subject box, enter the subject of the message which will help your correspondents, at first glance, to get an idea of the content of the message.

Enter the names or e-mail addresses of the correspondents in the “To” fields for those to whom the message is addressed, “Cc” (carbon copy) for those who receive a copy of the message, or “Bcc” (blind carbon copy) for those who receive a blind copy of the message. Separate the different correspondents with a semicolon.

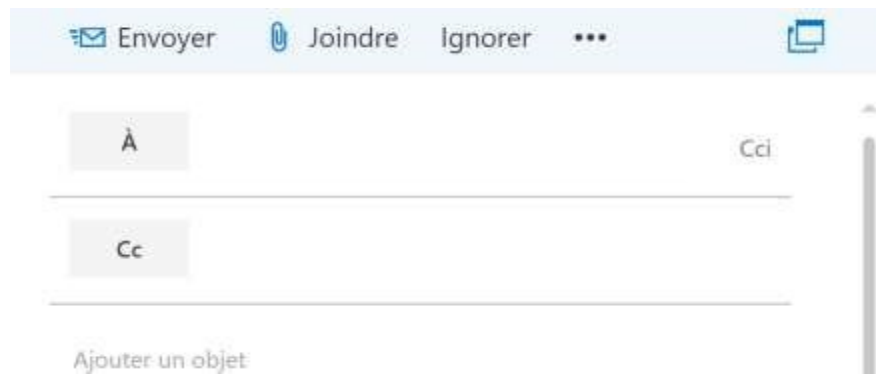
When you start typing a correspondent's name, Outlook suggests the names of people you've emailed before. In the example below, starting with the letter “b”. a first person whose name begins with a “b” will be displayed, because he/she is one of your recent correspondents or is in the address book of the sender.

À	b
Cc	 Ludivine Braconnier Ludivine.Braconnier@univ-lyon2.fr

You can choose a name from the list, type a full name or email address, or click the “**To**”, “**Cc**” or “**Bcc**” buttons to select one or more names from the address book. In this case, all you have to do is double-click on the name of each person concerned and the e-mail addresses will be added automatically. To exit the address book, click on “**Save**” or “**Cancel**”.



The “**Bcc**” area is not enabled by default. You can activate it by clicking on “**Bcc**” to the right of the “**To**” correspondent field:



Regarding the format of the messages, there are two options:

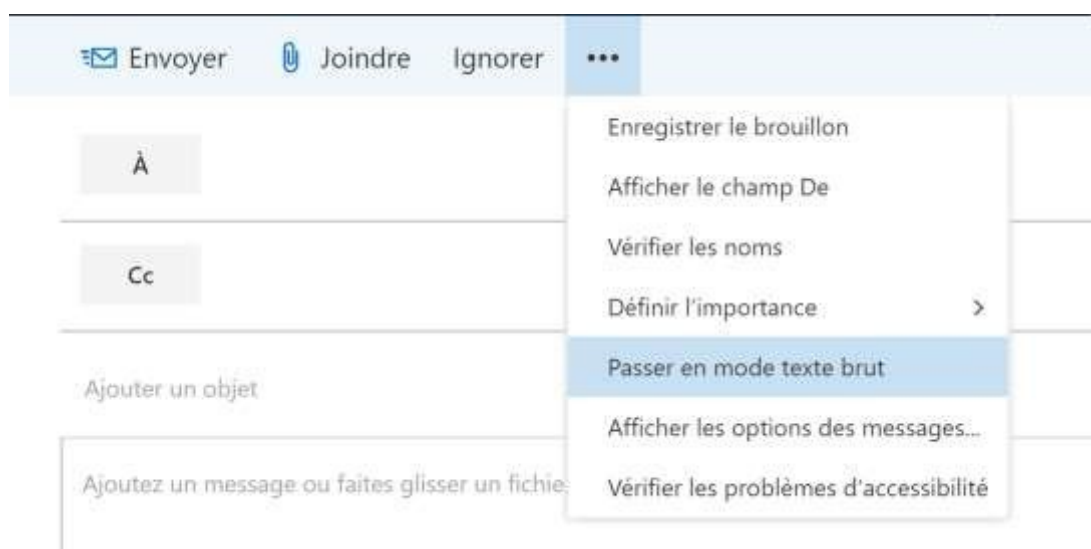
- **HTML** format (default);
- The **plain text** format.

**HTML** format allows you to insert images, tables, hypertext links and text formatting in the content of your message.

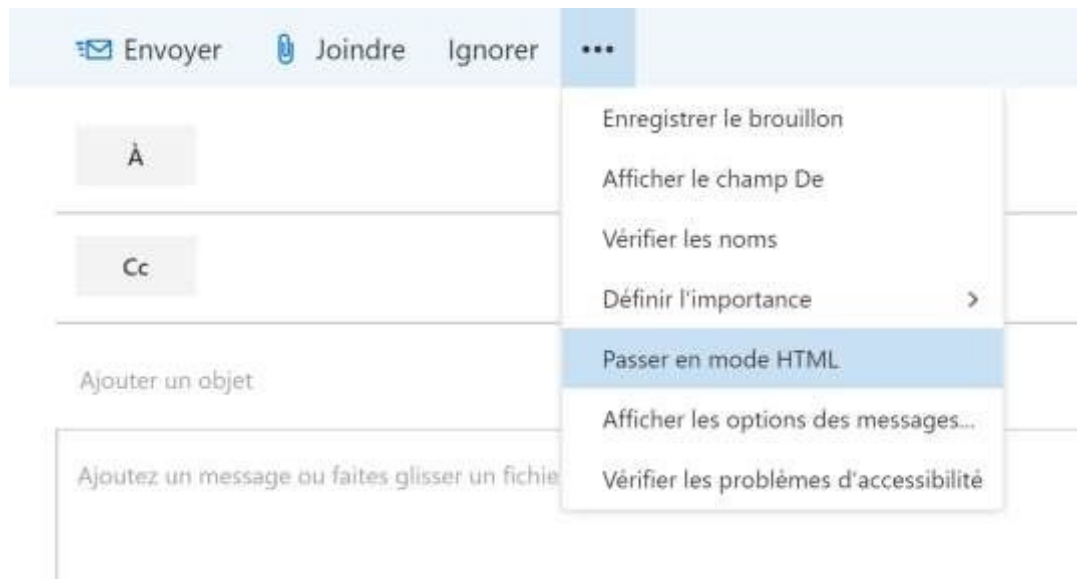
The **plain text** format allows you to write only text, without having the option of formatting.

You can change the HTML format to plain text (and vice versa) by clicking on the button in the banner containing the search field and the context menu. Below, you have an example of switching **from HTML** mode

(default) to **plain text** mode:



Below is an example of switching from **plain text mode** to **HTML mode**:



In **HTML mode**, at the bottom of the page there are two **toolbars**:

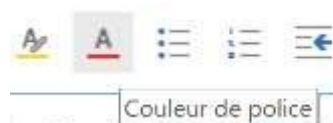
- The formatting toolbar:



- A second toolbar allowing you to add an attachment, add an image in the body of the message, insert emojis or show/hide the formatting toolbar:


















By hovering the mouse over each button, a small label gives you an indication of the function of the button. In the example below, by hovering over the button you can change the font colour:



You can apply formatting elements to an earlier selection or to the text that will be written from the cursor position. Here are (from left to right) the buttons present in the formatting toolbar and their functions:




-  Choose the font, display the list of available fonts;
-  Change the font size, display the available sizes;
-  Format the text in bold;
-  Format the text in italics;
-  Underline the text;
-  Highlight the text;
-  Change the colour of the text;
-  Create a bulleted list;
-  Create a numbered list;
-  Reduce paragraph indentation;
-  Increase paragraph indentation;
-  Align left;
-  Centre;
-  Align right;
-  Insert a hyperlink.


The button allows you to have more options related to formatting: ▼




In order, from top left to bottom right, you have the following options: remove hyperlink, superscript, subscript, strike out, add text to an image (when inserting an image into the body of the text and for **digital accessibility** reasons, each image must have an alternative text which describes, in a few words, the contents of the image), writing from left to right, writing from right to left, undo the last operation, redo the last operation, remove the formatting, insert a table.<sup>1</sup>

Do not hesitate to test all the available options. Make sure, however, that in order for your correspondent to benefit from the formatting you apply to your message, their mail application is configured to display messages in HTML mode. If his/her email client is configured in plain text mode, he/she will see only the textual content of your message, without any formatting and without any images inserted in the body of the message.

In this context, if you insert images in the body of the text with the button , an email client who has a read mode in plain text format will not display the images. They will either be deleted or replaced with the replacement text if it exists.

To prevent the “disappearance” of an image due to the format configured in your recipient's mailbox, you can add it as an attachment using the button . In this case, the image will be attached to your message and not inserted in the body of the message. The attachment does not depend on the playback format configured by your correspondent; it is a separate file.

To add an attachment, you can either click the button  or drag and drop a file from your computer's file explorer to the content area of your message.

Don't forget to sign your message. You will find a tutorial for creating a Lyon 2 signature with Outlook at the following address: <https://www.univ-lyon2.fr/vie-pratique/communication/parametrer-sa-signature-lyon-2>

---

<sup>1</sup> Digital accessibility makes digital resources available to all individuals, regardless of their hardware or software, network infrastructure, mother tongue, culture, geographic location, or physical or mental ability. For more details see: <https://www.w3.org/Translations/WCAG20-fr/>.

## 5.4 Replying to an e-mail

Here are the steps to follow to reply to an email:

1. Select an email you want to reply to.
2. Select Reply.
3. Type an answer.
4. Select Send.

**Attention:** when you reply to a message, **by default, the contextual menu suggests “Reply to all”**. This means that your reply will be broadcast to all those who have received the message, that is to say the addresses in the “To” and “Cc” fields.

If you want to reply only to the sender and not to other people who are among the recipients or as a copy of the message, click the “**Reply to all**” button and select “**Reply**”. This allows you to send your reply only to the sender of the message you are replying to.



Using the “**Reply to all**” option does not also allow you to reply to people who are in a hidden copy of the message (**Bcc**).

You can change the setting of your Outlook webmail to reply, by default, only to the sender (see <https://www.univ-lyon2.fr/numerique/conseils-de-parametrage-de-votre-outlook>).

## 5.3 Forwarding to share mail with other people

To forward an email:

1. Select a message to forward.
2. Select “**Transfer**”.
3. Enter the names of the people to whom you want to forward the message.
4. Add a note in the body of the mail if you wish and/or attachments.
5. Select “**Send**”.



## 6 Organising your emails

When you receive a lot of emails, it is a good idea to organise them, classify them/tidy them up. This is done by right-clicking on one of the folders in the Folders pane, on the left side of your interface. This allows you to:

- Create a new folder — when you right click on the root folder with the name of your email account:




- Create a new subfolder when you click on another folder: **Inbox**, **Sent Items**, etc. :



To move messages, all you have to do is select them in the message list and drag and drop them into the desired folder or subfolder.

## 7 Managing contacts: managing your contacts, creating and managing contact groups, importing and exporting contacts

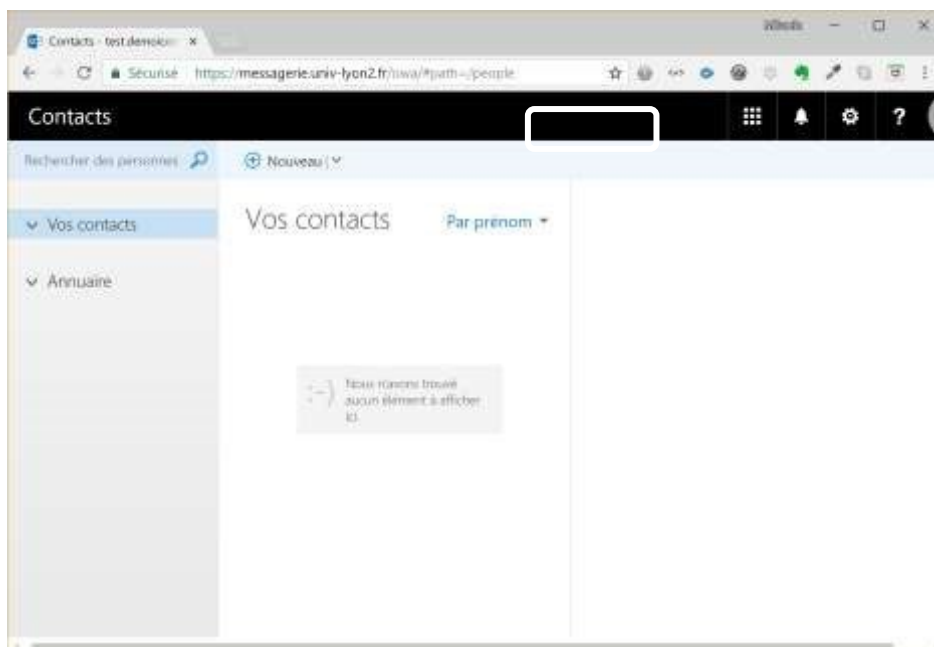
**Contacts** are the people you communicate with frequently, whether through email or other digital means of communication. You can store contacts in an **email address book**.

The **Contacts** module (your email address book in Outlook) is accessible through the **menu**  and allows you to manage the list of your contacts.

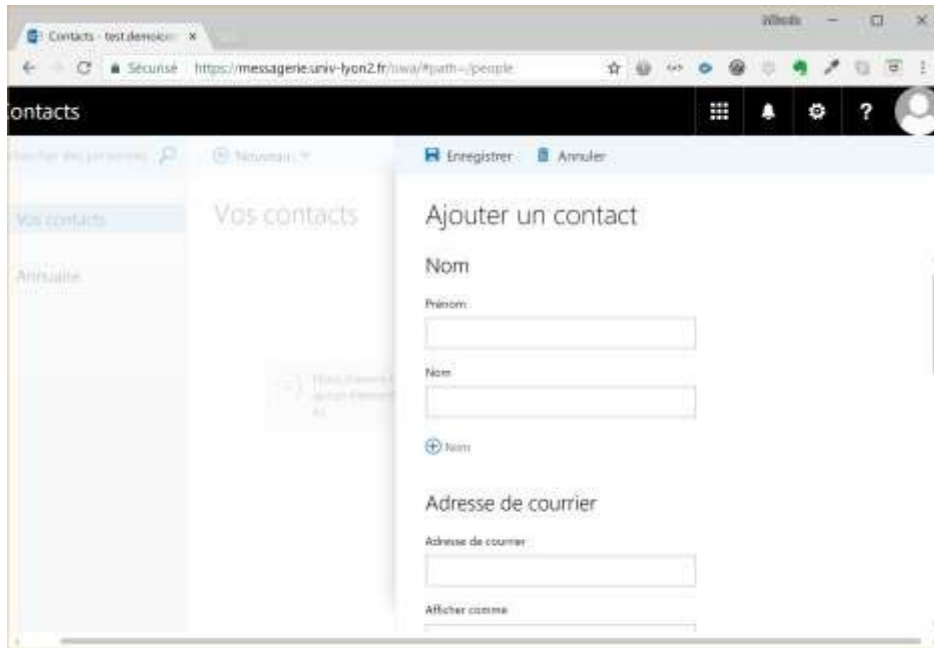
### 7.1 Creating a contact

To **create a new contact**:

1. Select New > Contact



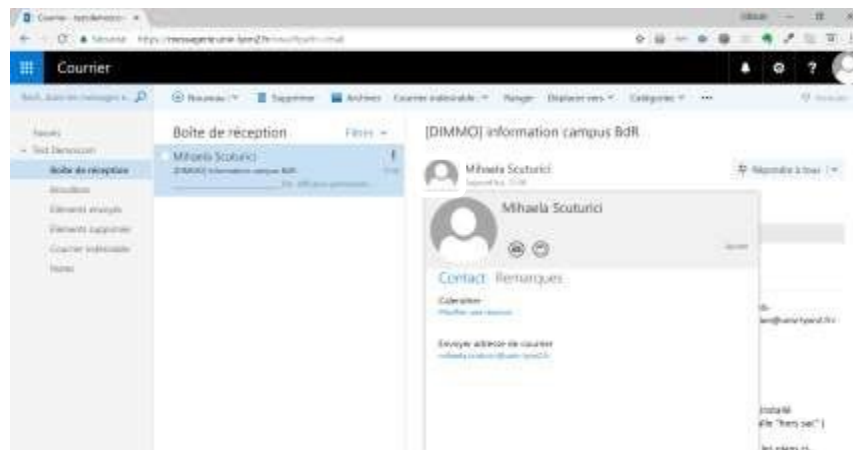
2. Complete the information relating to your contact: first name, last name, e-mail address, postal address, telephone number, instant messaging, web page, birthday, school, work data, nickname, etc.



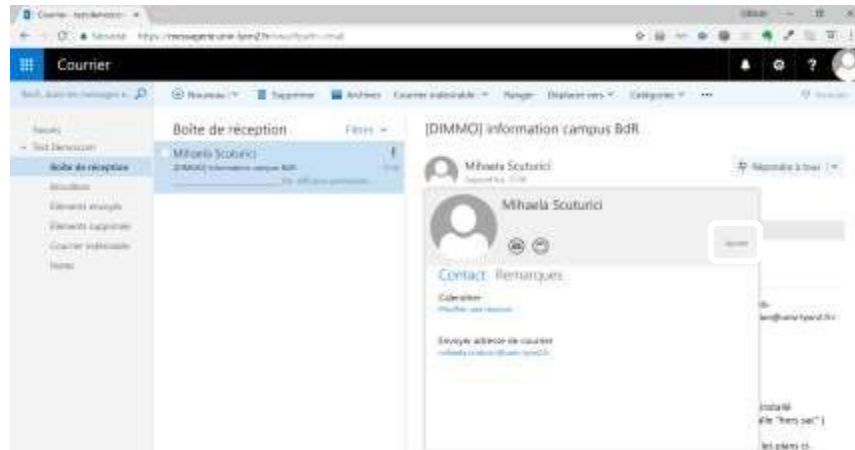
3. Click on the “**Save**” button to save it.

You can also create a contact from an email message:

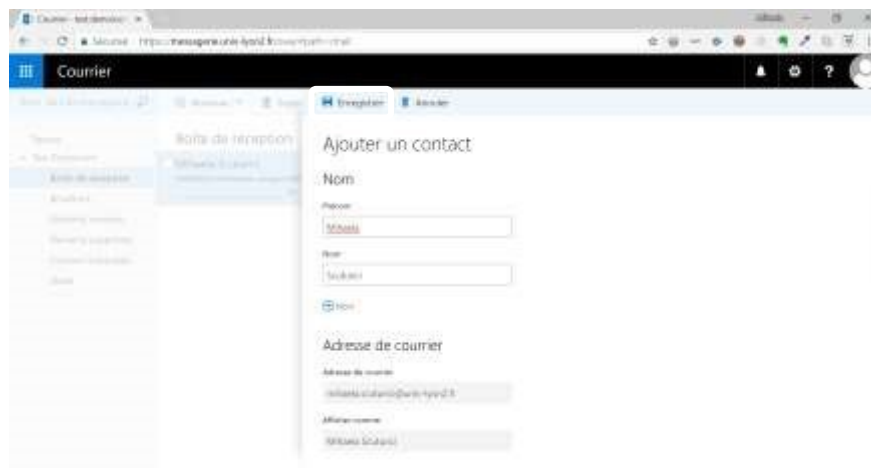
1. Open an email message and click the sender avatar.



2. Click on “**Add**”. Complete the additional information.



3. Click on “**Save**” to add this contact to the application.

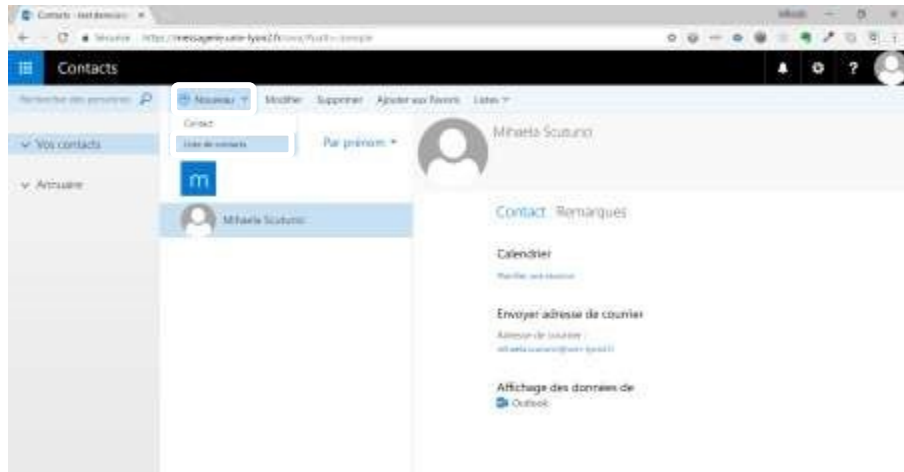


## 7.2 Creating a contact list

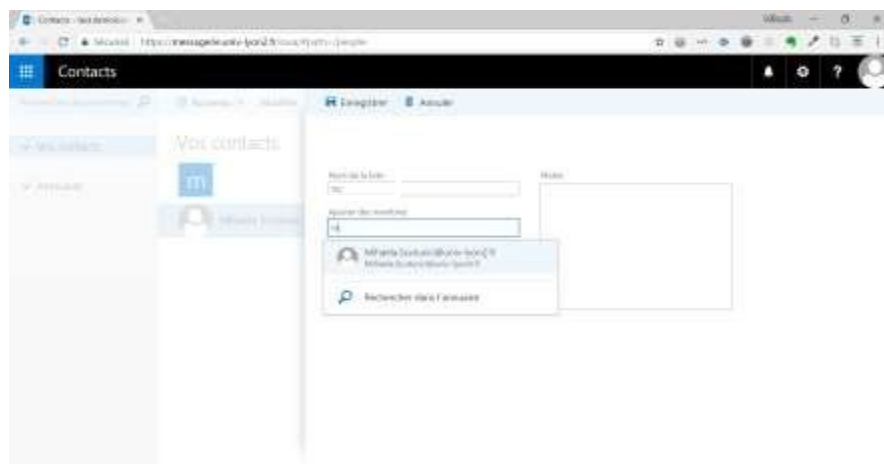
You can also create **contact lists** that allow you to associate several contacts as part of the same group. A list allows you to send an email to several people at the same time, without having to enter or select each address. Identify by name a list of contacts to which you write frequently: to write to them, just enter the name of the list in the chosen sending field.

To create a contact list:

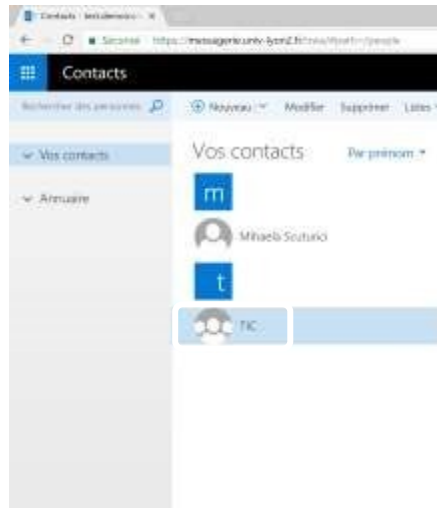
1. Click on the “**New**” button, then “**Contact list**”.



2. Enter the name of the list and add contacts by entering the first letters and selecting the proposed contacts.



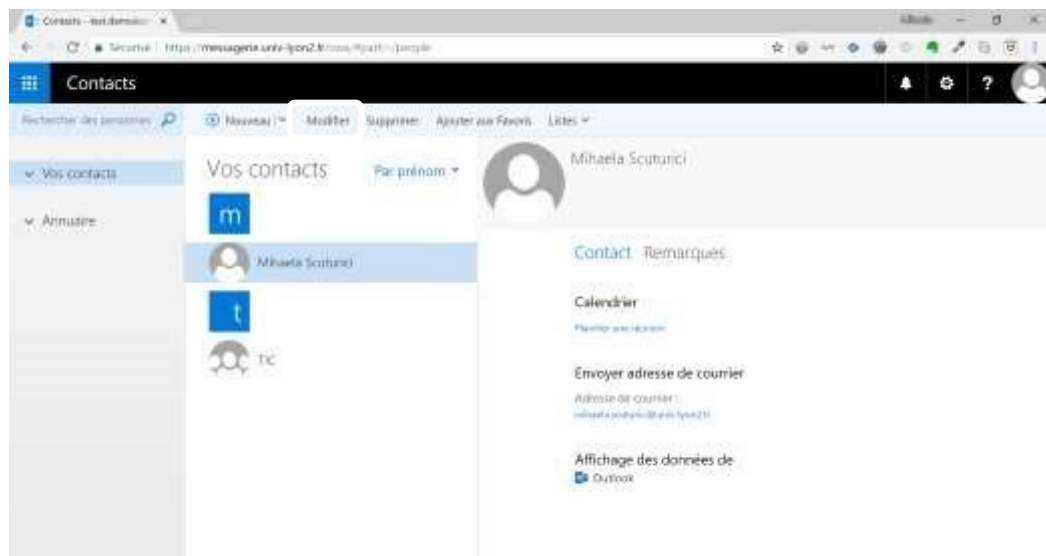
3. Click on “**Save**” to save the list. This list will be added to your contacts and is marked with a specific icon.



### 7.3 Editing or deleting contacts

To edit a contact:

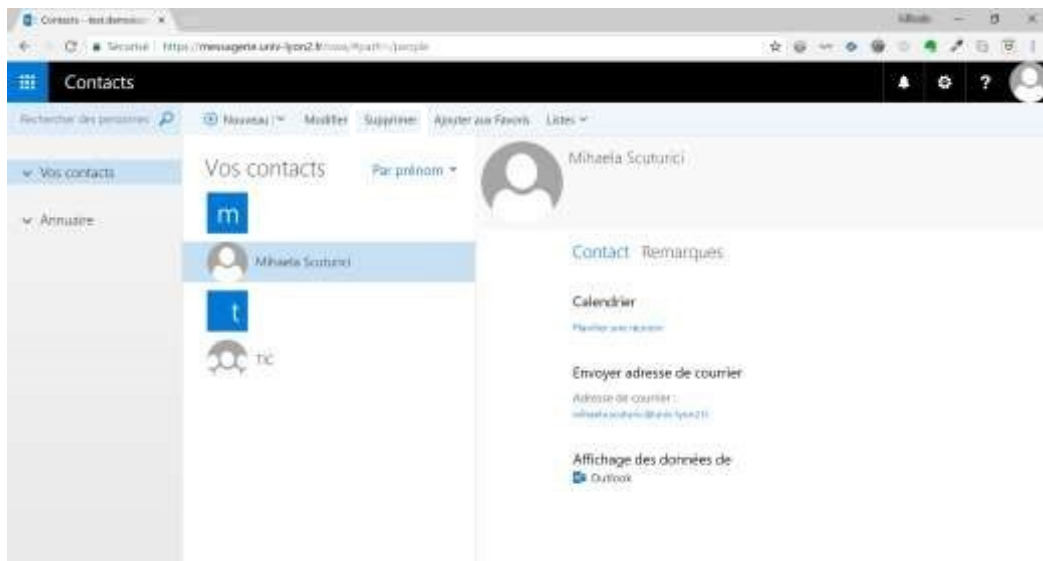
1. Select the contact from the list and press “**Edit**”.



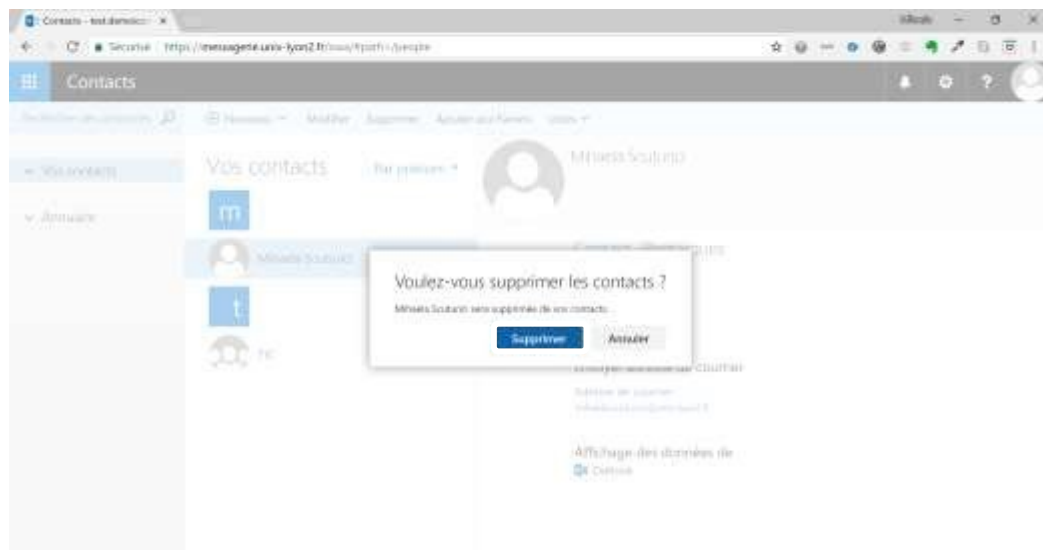
2. Make the necessary changes
3. Save the changes.

To delete a contact:

1. Select the contact from the list.
2. Press “**Delete**”.



3. Validate the deletion.

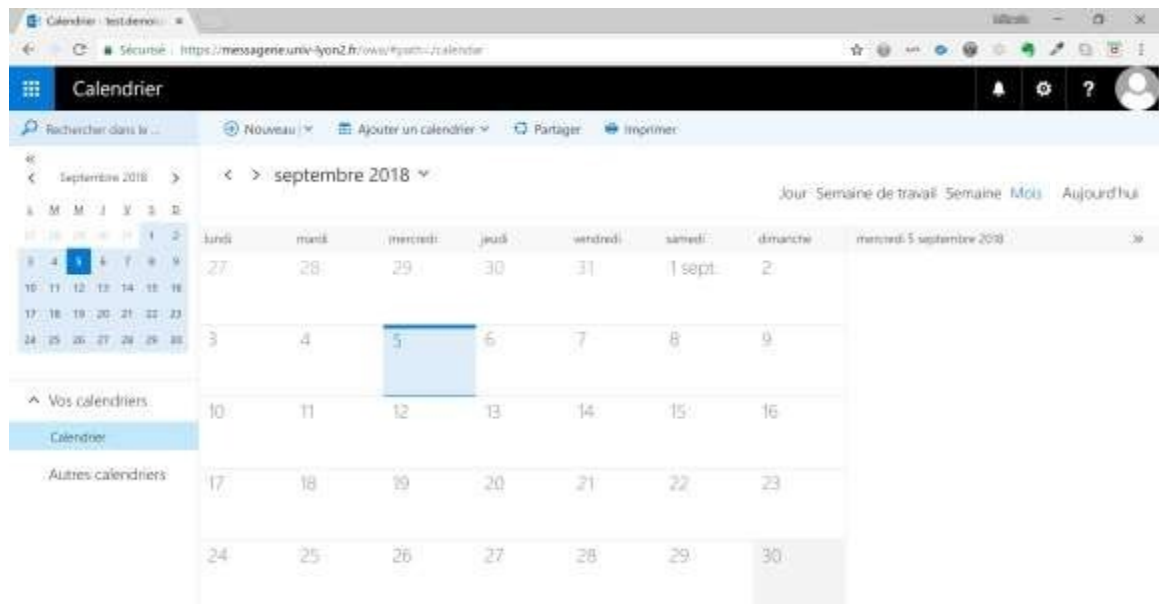


## 8 Collaborating

In a working group, the members come together around a common project. Polling or date picker tools help make simple decisions, like picking a meeting date that works for everyone.

The **calendar** in Outlook may be used to create and follow appointments and meetings. You can create multiple calendars, link your calendar to other people's calendars, and even share it with others in your organisation.

You can choose from four different views: **Day**, **Work week**, **Week** and **Month**.

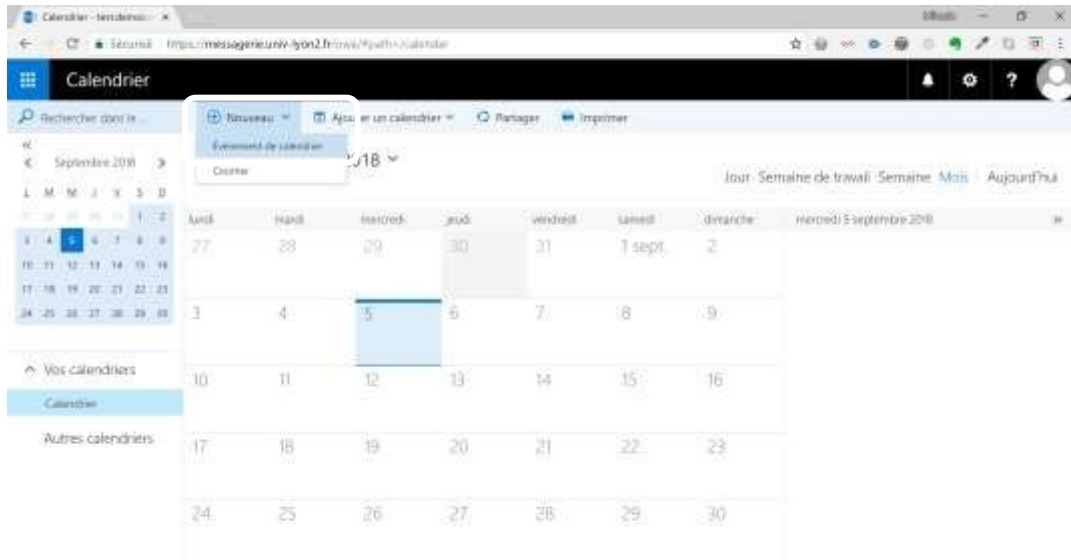


## 8.1 Scheduling a meeting

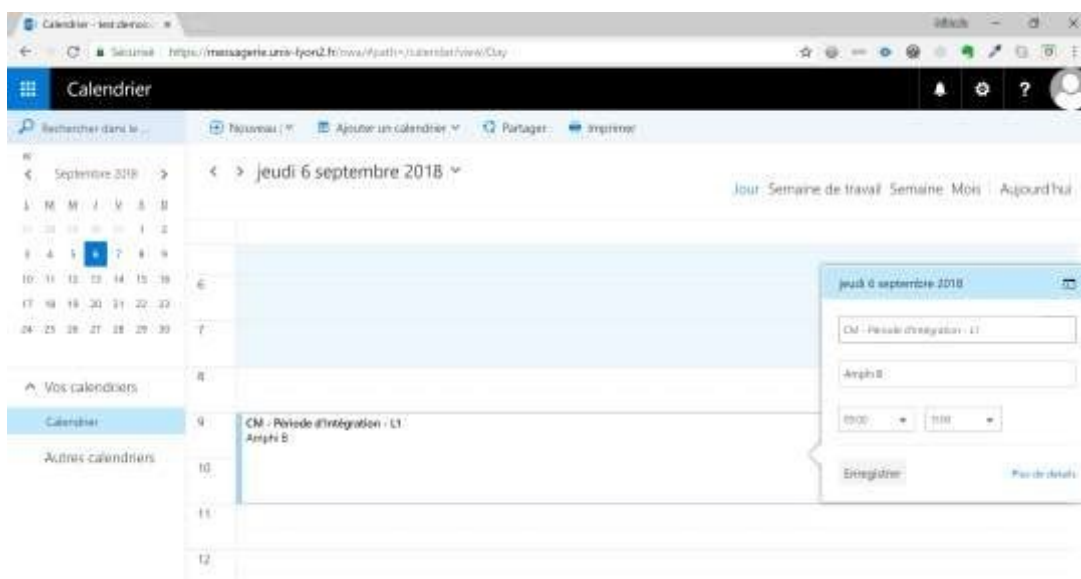
Any event you create displays your name as the creator and includes a link to edit or delete the event. To create an event:

1. Click **New** > **Calendar Event** or double-click, click, or select a time slot on the desired day.

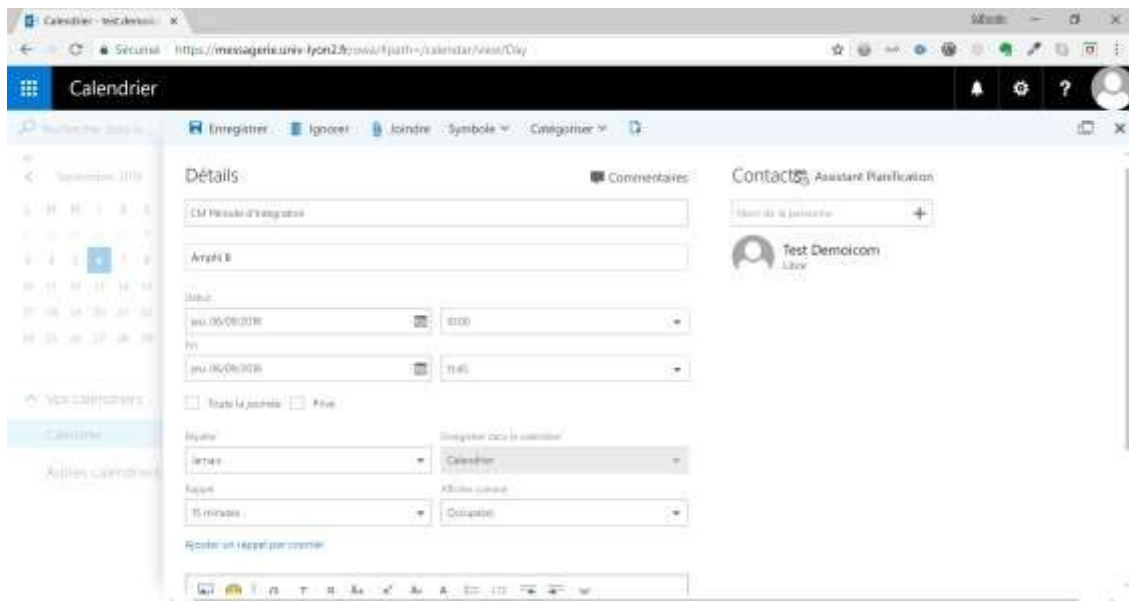




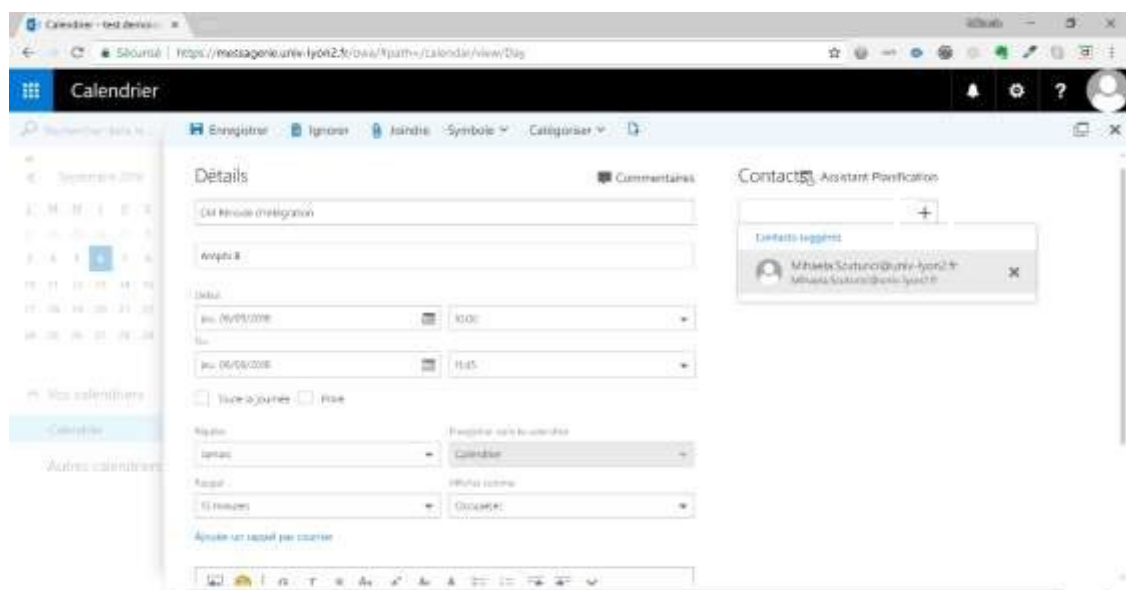
By selecting or simply clicking on a time slot, you have a simplified input interface that allows you to enter a name and location, change the time slot and record the event. A **“More details”** link provides access to the complete input interface.



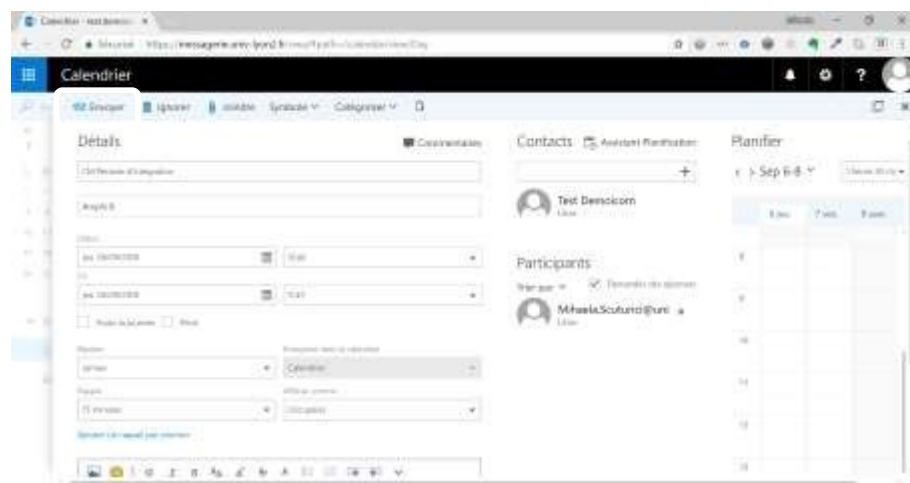
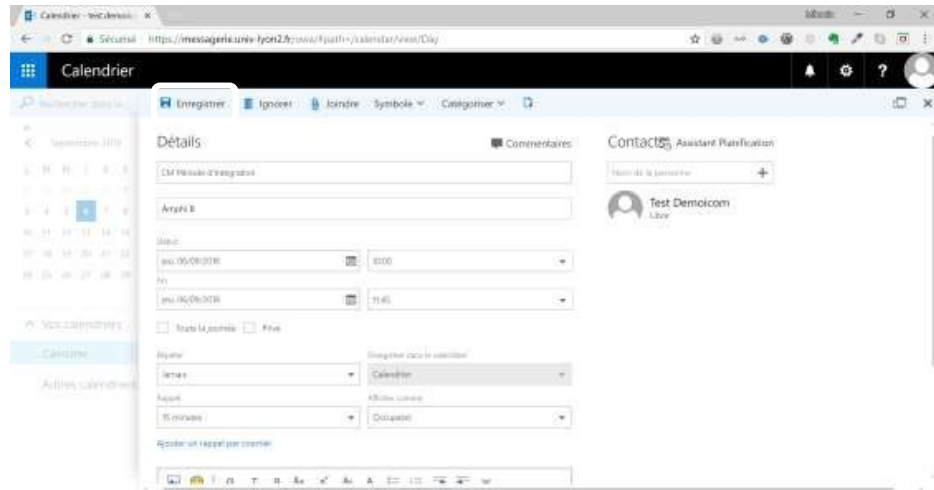
By choosing **“New > Calendar event”** or by double-clicking on a time slot, you will have access to a more complete input interface:



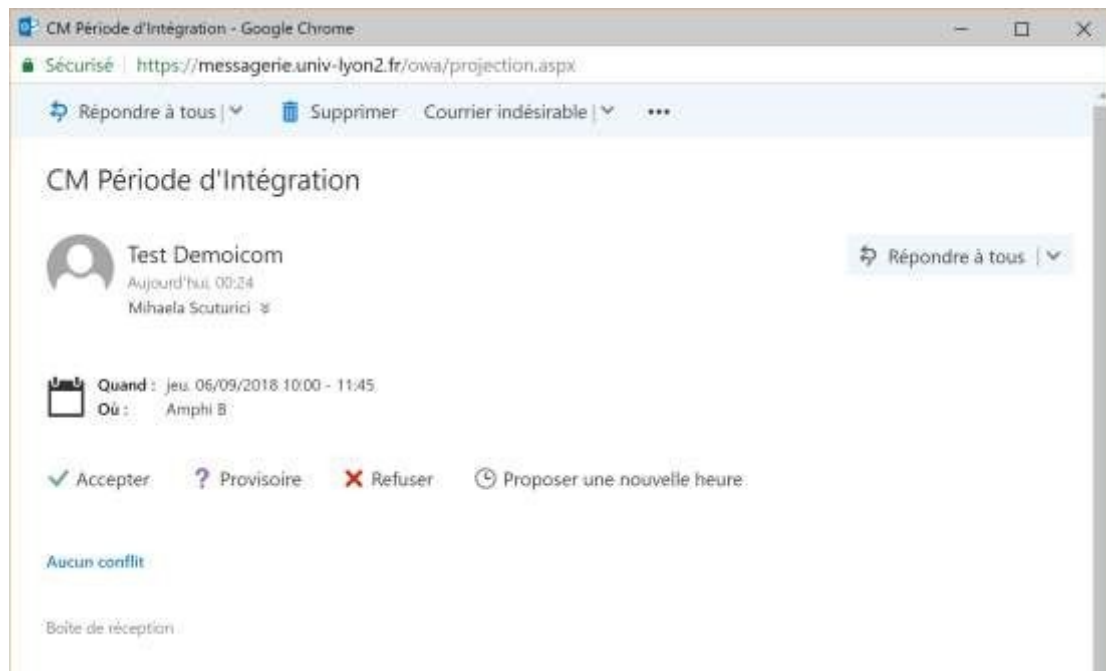
2. Enter the information and choose the people with whom you will share this event from the list of your contacts.



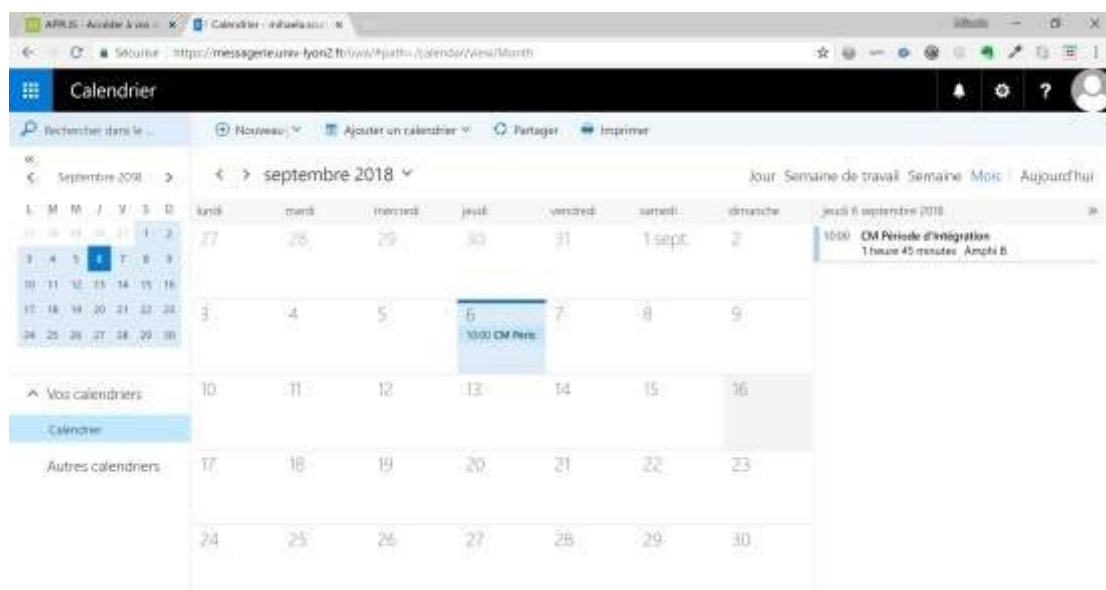
3. Register the event or send the invitation if you have selected contacts with whom you are sharing the event.



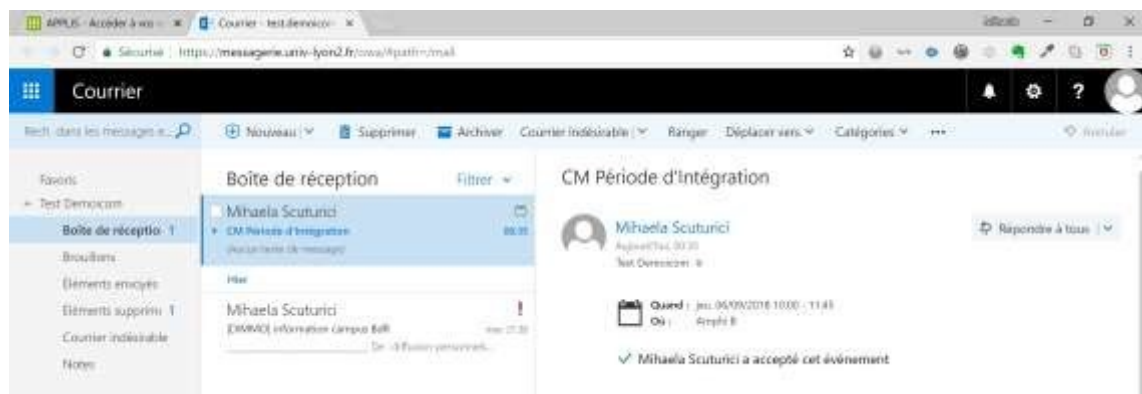
Any meeting to which you are invited will display the name of the host and include links to respond to the invitation. If the host has included an invitation to an online meeting, you'll also see a link to join the meeting. Below is the message received after sharing the event. The person has the option of accepting the event — definitively or provisionally — of rejecting it or proposing a new time.



Once the event is accepted by the person receiving the message, **it is automatically entered in their calendar.**



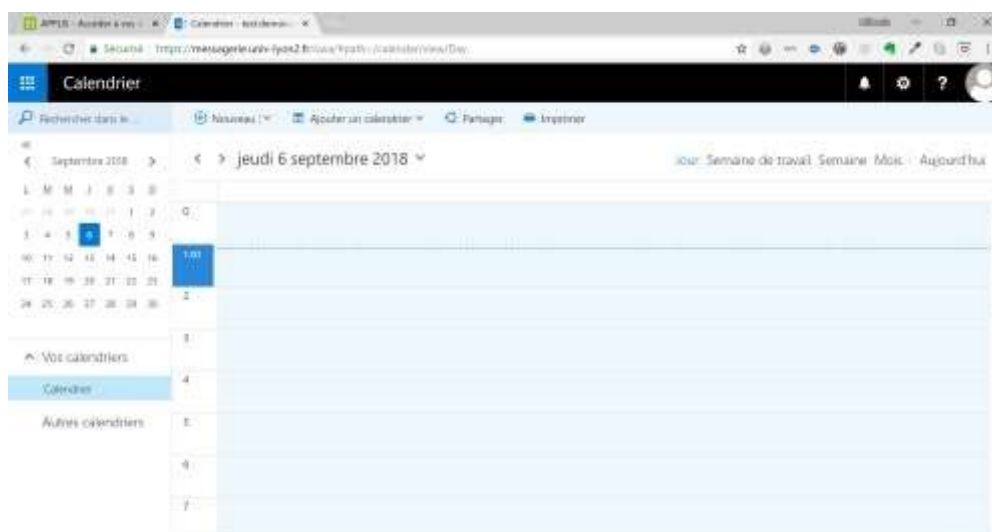
The event creator will receive an email confirming acceptance of the event by the person invited:



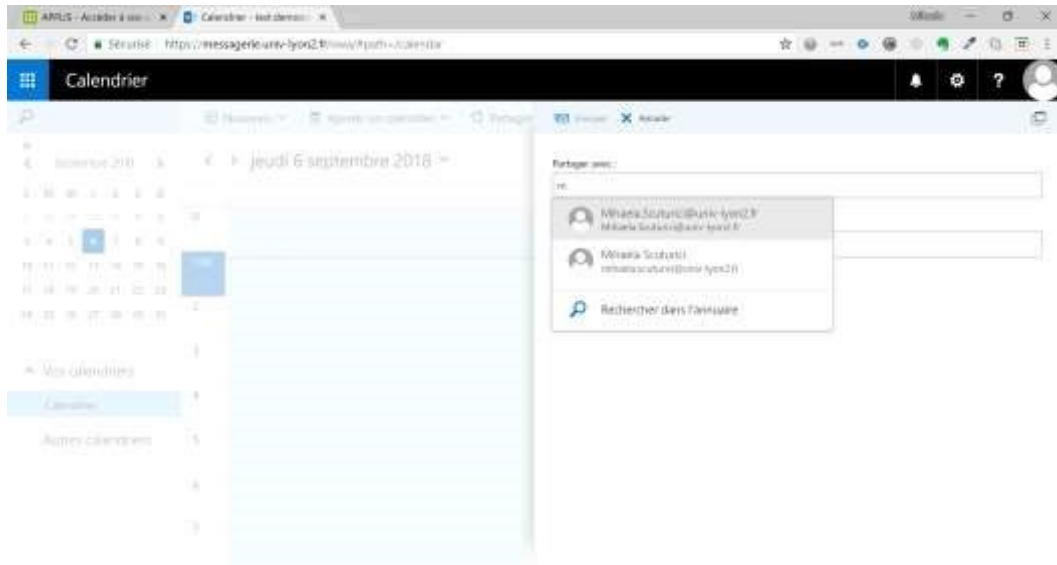
## 8.2 Sharing a calendar

You can easily share your calendar with others at the University.

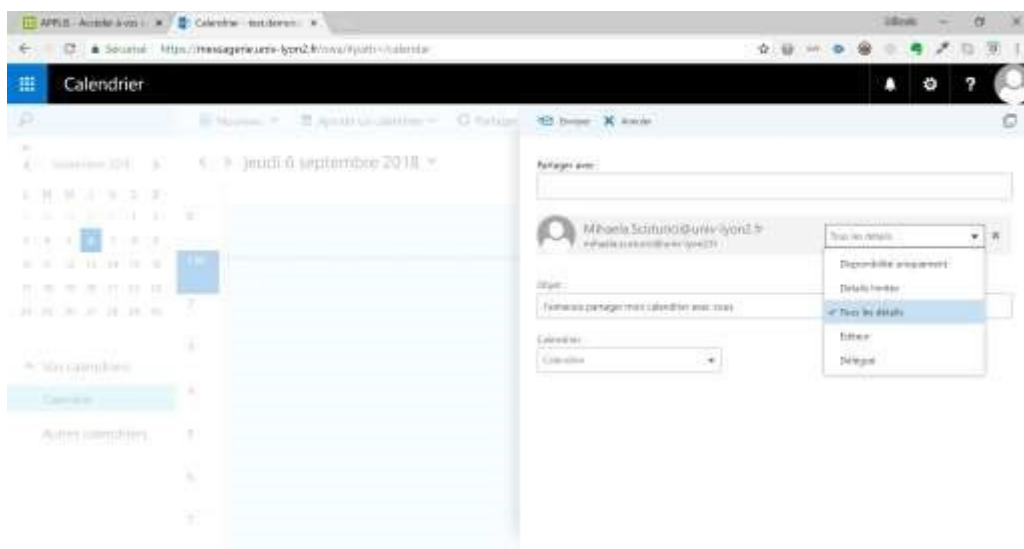
1. Start by choosing “**Share**” at the top of the calendar window.



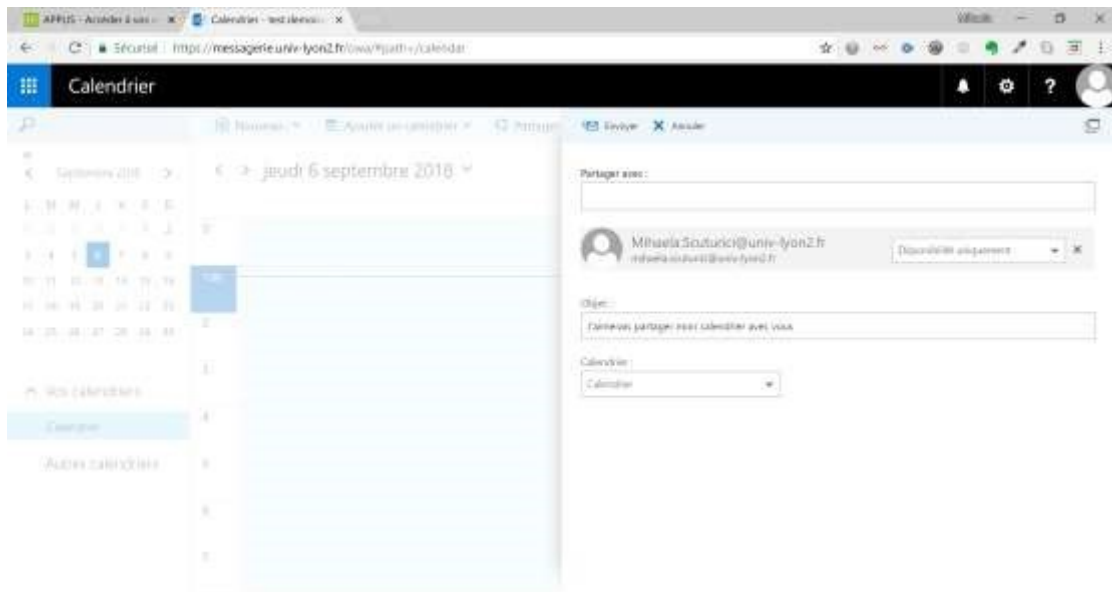
2. In the “**Share with**” box, type the name of the person with whom you want to share your calendar. Outlook will automatically find the name in your address book. Once the person is selected, they are automatically added to the list of people with whom to share the calendar. You can add as many people as you want.



- Then choose the level of information to share: **“All the details”** (default option) allows the person to see all the available information about the events on your calendar, except those that you have marked as private. **“Limited Details”** displays the purpose and location of the event. **“Availability only”** shows that you have an event scheduled at this time, but without further details. Private events are always displayed as Busy. You can grant users permission to edit your calendar by selecting **“Editor”**. To give someone permission to send — and respond to — meeting requests on your behalf, select **“Delegate.”**



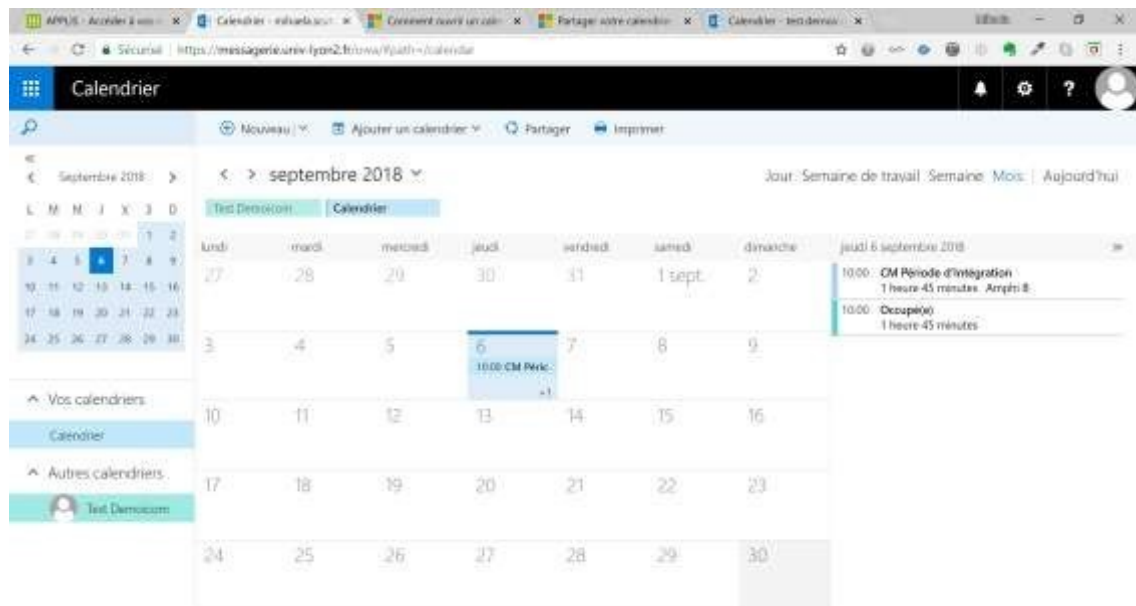
4. You can edit the subject if you want. If you have multiple calendars, choose the ones you want to share. Most people share their default calendar (named Calendar), but you can share any calendar that is in your mailbox.
5. After adding all the people with whom you want to share and setting their access level, select **“Send”** to share the invitation or **“Ignore”** to cancel.



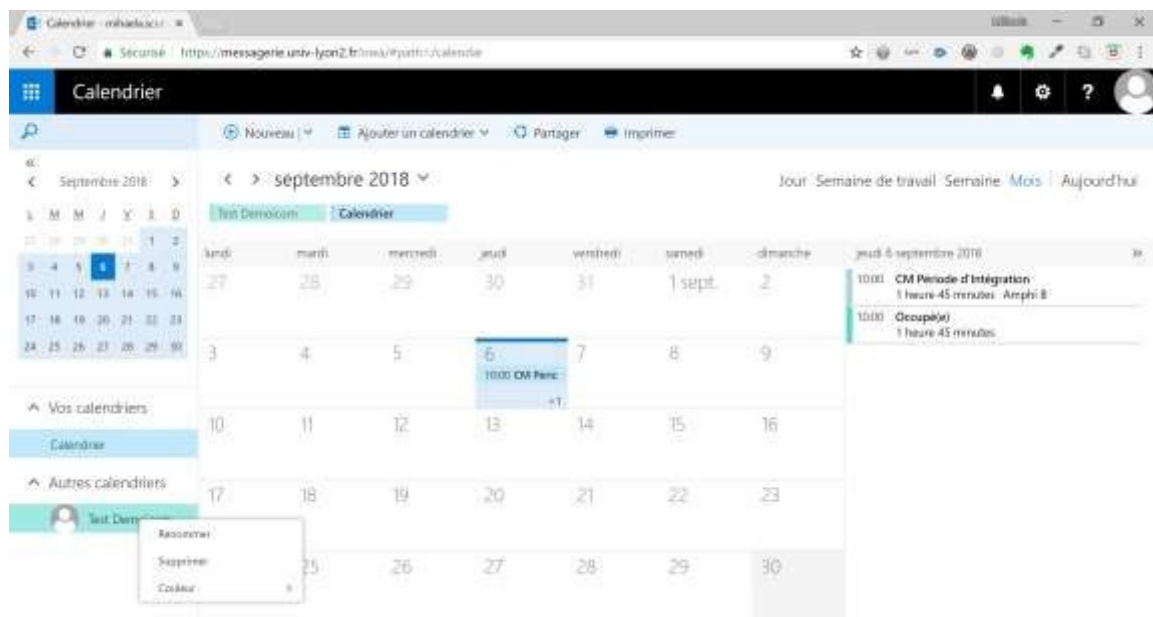
When sharing a calendar that is different from your main calendar, for example a project calendar that you created, you cannot select **“Delegate”**.

Calendar items marked as private are protected. The people with whom you share your calendar will see only the time of items marked as private, not the title, location, or other details.

If you receive an invitation to share a calendar from another person, click **“Accept”** in the message to add their calendar to your **“Calendar”** view. It will appear in the **“Other calendars”** section with a different colour from your calendar(s).

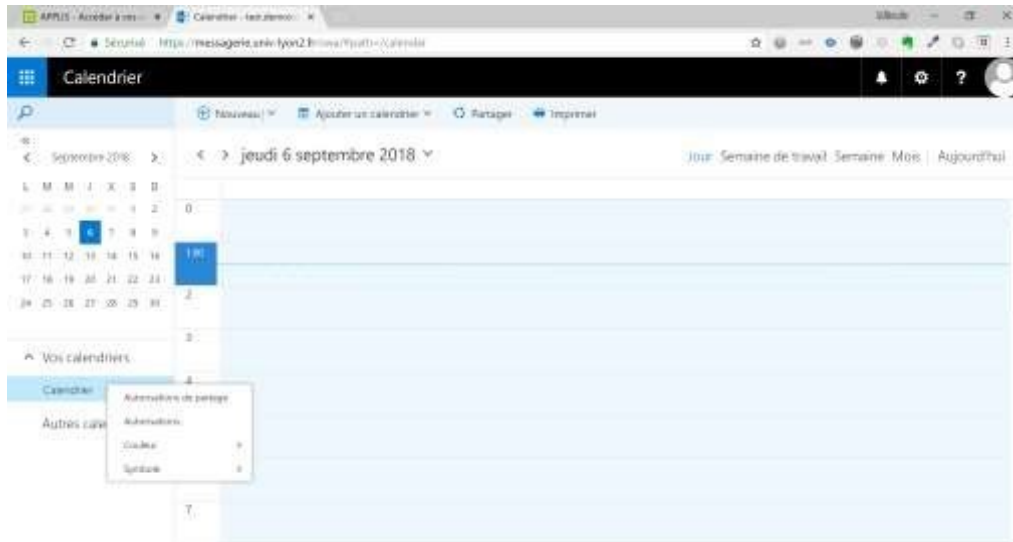


Once you have added a calendar, you can select it in order to add it, remove it from your “**Calendar**” module view, or use the context menu to rename it, change its colour or remove it from your view.



If you want to change the sharing permissions for a calendar, right-click on the calendar for which you want to update the sharing settings, then select “**Sharing permissions**”.





Find the person whose permissions you want to change, then choose a different permission level or select “**Remove**” to stop sharing your calendar with that person.

When you remove a person from the list of people with whom you shared your calendar, the URL that was sent to that person will no longer work.

## 9 Conclusion

In this document we have presented a part (far from being exhaustive) of the Outlook web Application options for three modules: email, contacts and calendar.

For the knowledge of this course to be assimilated, you must practise by attempting to reproduce the procedures which are described.