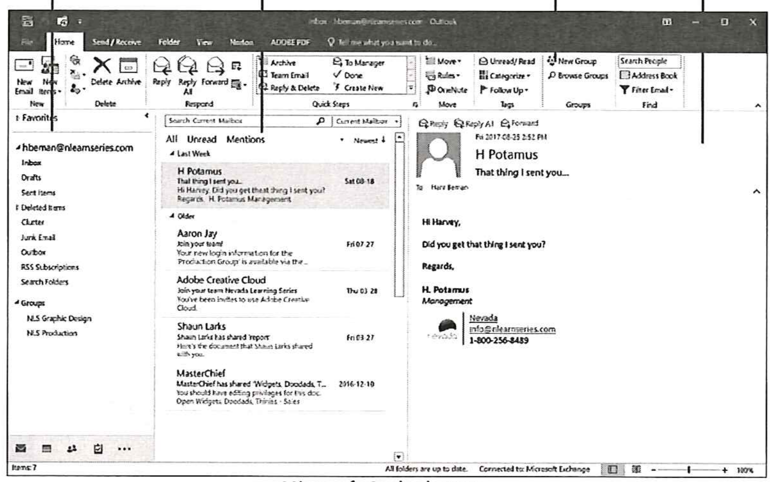
IBM Notes 9 to Outlook 2016

Getting to Know Outlook 2016

Much of Outlook 2016's Mail app will be familiar if you're used to Mail in IBM Notes 9, though Outlook has many additional features that you can take advantage of to make your work easier. The Toolbar Ribbon and tabs in Outlook 2016 provide easy access to a number of tools to organize your email and create messages, while the **Tell me what you want to do...** search bar allows you to easily access hard to find options or operations.

IBM Notes 9



Microsoft Outlook 2016

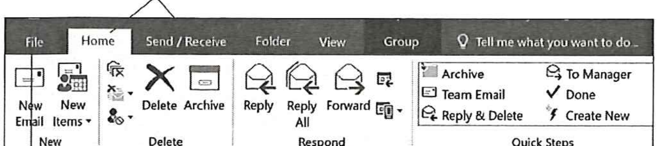
File Menu

Click the **File** tab on the Ribbon to open the File Menu, where you will find options to **Open**, **Print**, and **Save** Outlook items, as well as tools to create **Inbox Rules** and **Automatic Replies**, and to share Outlook content.

The Ribbon

The Ribbon is a series of toolbars located along the top of your Outlook window. These replace the toolbar located on the top of the IBM Notes 9 interface. The Ribbon is organized by various tasks, known as Ribbon tabs. Once you click on a Ribbon tab, the relevant toolbar displays associated commands and buttons. For example, the **Home** Ribbon tab displays commonly-accessed commands such as New Email, Reply, Reply All, and Forward.

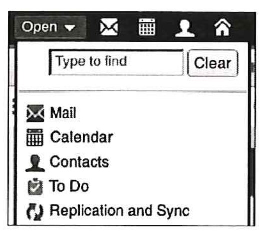
Ribbon tabs



Click **File** to open Outlook's File Menu.

The Open Button → The Navigation Bar

While IBM applications are stored under the **Open** button, Outlook applications (*e.g.*, Mail, the Calendar, Tasks, People) are available in the Navigation Bar located at the bottom of the Folder Pane, or, if expanded, across the bottom of the Outlook window.



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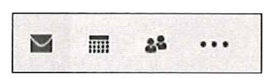

Note: Navigation buttons can also be expanded as shown below. Access settings by clicking the ellipsis ••• on the right end of the Navigation Bar and selecting **Navigation Options**.

Mail Calendar People Notes Tasks Folders

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Outlook Interface Features & Working with Mail

Outlook Interface Features

Mail (Known as Mail in IBM Notes 9)

Mail is the default view in Outlook 2016. You can also select **Mail** from the Navigation bar to display your Inbox and all emails. See below for more information on *Working with Mail*.

Calendar (Known as the Calendar in IBM Notes 9)

Click **Calendar** in the Navigation bar and check the box ☐ for the calendar you want to display under **My Calendars**. Use the buttons in the **Arrange** group on the **Home** tab, or in the **Arrangement** group on the **View** tab, to change the calendar view.

People (Known as Contacts in IBM Notes 9)

In IBM Notes 9, all of your contact information is stored under Contacts. In Outlook 2016, click **People** in the Navigation Bar to display the contacts page, where you can add, delete, change, and search contact information.

Tasks (Known as To Do in IBM Notes 9)

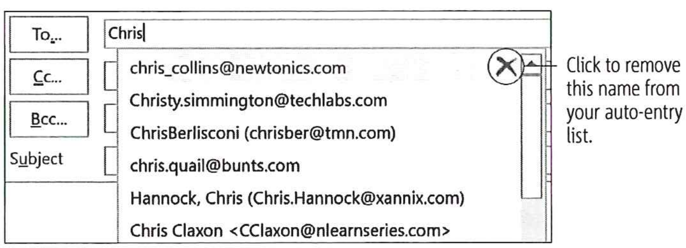
In Outlook 2016, To Do items are called Tasks. You can create a task item for yourself, or assign one to someone else. Click **Tasks** on the Navigation Bar display the task list.

Working with Mail

The Mail feature in Outlook can be considered your central hub for email management and composition. Similar to IBM Notes 9, this is the area of the application where you can create, reply, forward, and read messages.

Creating New Messages

1. On the **Home** tab, click **New Email**, or click **New Items** ▶ **E-mail Message**. Alternatively, press Ctrl+N while in Mail.
2. In the new message window, address your message using one of the following methods:
   - Type the recipients' email addresses, separated by semicolons, in the **To**, **Cc** or **Bcc** field. As you type, matching names or email addresses you've used previously will appear in the **Show Fields** group on the **Options** tab in your email window.

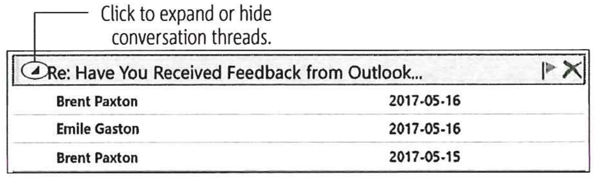


   - Click one of the recipient buttons (*e.g.*, To...) or, in the **Names** group, on the **Message** tab, click **Address Book**. Select names and click the appropriate recipient button (*e.g.*, To->) to add them.
3. Fill in the **Subject** field. Type your message in the composition area, using the **Basic Text** group to format text as needed.
4. When your message is complete, click **Send**. Your message is transferred to the **Outbox**, and then copied to the **Sent Items** folder once it is sent.

Note: If the blind carbon copy (Bcc) field is not visible, enable it by clicking **Bcc** in the **Show Fields** group on the **Options** tab in your email window.

Conversation View

Emails with the same subject can be grouped together as a conversation.



To enable conversation view: on the **View** tab, check the **Show as Conversations** box ☐ in the **Messages** group.

Additional Message Options

To set message importance: while composing a message, on the **Message** tab, select an importance level from the **Tags** group.

To set message sensitivity: while composing a message, on the **Message** tab, click the Message Options button at the bottom of the **Tags** group. In the **Properties** dialog box, choose the desired **Sensitivity** (or **Importance**) level in the **Settings** section. Click **Close**.

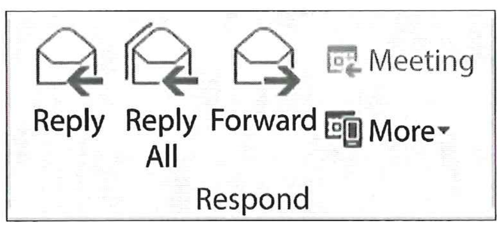
To request a read or receipt notice: while composing a message, on the **Options** tab, check the appropriate box ☐ in the **Tracking** group.

Responding to a Message

1. Click the message in the Message list and then, choose an option in the **Respond** group on the **Home** tab.
2. Type your reply above the original message text and click **Send**.

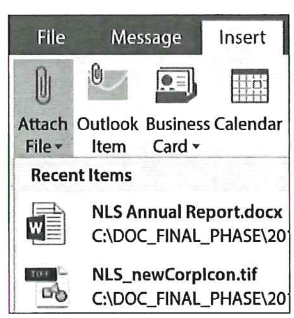
Enhanced Attachment Management

When attaching a file to a new email in Outlook 2016, you can browse a list of recently-used documents, or go directly to your local or cloud directories. Additionally, attaching files from your SharePoint, OneDrive Personal or OneDrive for Business cloud account(s) lets you set viewing and editing permissions for your recipients on a per-attachment basis.



To attach online files and set their permissions:

1. In your new email's window, click the **Insert** tab, then click **Attach File** in the **Include** group.
2. Mouse over **Browse Web Locations**, and select your online location. Browse to your desired file and click **Insert**. Your file will appear in the **Attached** field beneath the **Subject** field.
3. All attachments are set to **Recipients can edit** by default. To change these permissions, click the attachment's drop-down arrow and select **Change permissions**.



Creating Signatures

To create a signature: click **File ▶ Options ▶ Mail**. Click **Signatures...**. Click **New**. Type a descriptive name for your signature and click **OK**. Type and format the signature text.

Note: To include an electronic business card, click **Business Card**. Select your name from the address book and click **OK**.

To automatically add a signature to outgoing messages: in the **New messages** drop-down menu of the **Signatures and Stationery** dialog box, select the signature you want to use. You can also choose a signature to use for **Replies/ forwards**, if desired.

Note: Choose **(none)** to stop automatically inserting a signature.

To manually insert a signature: while composing a new message, click **Signature** on the **Message** tab, and choose a signature from the list.

Creating an Out-of-Office Message

An out-of-office message is a response that is automatically sent in reply to incoming messages while you're away from the office.

1. Click **File ▶ Info**. Click the **Automatic Replies** button.
2. In the **Automatic Replies** dialog box, select ◉ **Send automatic replies**. Choose a start and end time and date for your out-of-office period, if desired.
3. Under the **Inside My Organization** tab, write and format your message. Click the **Outside My Organization** tab to create a second message for external contacts. Click **OK**.

Creating and Managing Inbox Folders

To create a new folder: right-click the main **Inbox** folder (or any sub-folder, if desired) and choose **New Folder** from the menu. Alternatively, on the **Folder** tab, click **New Folder** in the **New** group. Enter a name and press Enter, or click **OK**.

To move a folder: click and drag a folder to a new location. Note that you can also drag one folder into another to make it a sub-folder.

To rename or remove a folder: right-click the folder and choose the desired option from the menu. Alternatively, select the folder and, on the **Folder** tab, select an option from the **Actions** group.

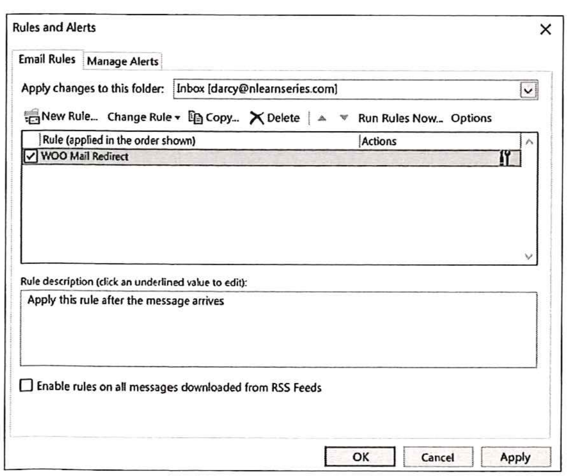
Sorting and Filtering with Inbox Rules

Use Inbox Rules to automatically move messages to folders based on chosen criteria.

To create a new rule: click **File**, and then click the **Manage Rules & Alerts** button. Click **New Rule**. Follow the prompts in the **Rules Wizard**.

Tip: To create a rule for a selected message (or its sender), on the **Home** tab, in the **Move** group, click **Rules ▶ Create Rule**. If necessary, click **Advanced Options** to open the Rules Wizard.

To make changes to a rule: in the **Rules and Alerts** dialog box (see below), select the rule. Click **Change Rule ▶ Edit Rule Settings**.



Working with Calendar

Your Outlook Calendar operates similarly to your IBM Notes 9 Calendar, in that it helps you to schedule appointments and organize your time. With the Outlook Calendar, you can manage different calendar views, create group calendars, and set up and respond to meetings. All of this functionality will feel very familiar to you, as the steps outlined below are similar to those that you take in IBM Notes 9.

Calendar Views

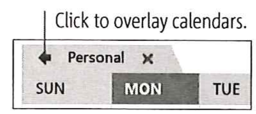
You can access the calendar by clicking the **Calendar** icon at the bottom of the Outlook window. Use the buttons in the **Arrange** group on the **Home** tab, or in the **Arrangement** group on the **View** tab, to change the calendar view.

Creating Calendars

Calendars are displayed within groups in the Calendar Folder List in the Navigation pane.

To create additional calendars: on the **Home** tab, in the **Manage Calendars** group, click **Open Calendar ▶ Create New Blank Calendar**. Alternatively, right-click in a calendar group (*e.g.*, **My Calendars**) in the Calendar Folder List and choose **New Calendar** from the menu. In the **Create New Folder** dialog box, name the calendar and click **OK**.

To display multiple calendars: check the box ☐ beside the calendars in the Calendar Folder List that you want to display. By default, calendars are displayed side-by-side. They can also be set to overlay, showing both calendars together.



To create additional calendar groups: on the **Home** tab, in the **Manage Calendars** group, click **Calendar Groups**, and choose an option. Name the new group and click **OK**.

Scheduling Appointments and Meetings

Appointments are usually personal events, while meetings require attendees.

Note: If you are creating a personal appointment, you can skip step 2, below.

1. With the Calendar displayed, on the **Home** tab, click **New Appointment** or **New Meeting**.
2. Click **To...** or, in the **Attendees** group, click **Address Book**. Select attendees and add them to the invite list using the **Required** or **Optional** buttons. Click **OK**.

Note: Alternatively, type names in the **To...** field to add them quickly.

3. Select a time using the **Start time** and **End time** controls.
   - **To create a recurring event:** click **Recurrence** in the **Options** group. Choose when and how often the event will repeat, and click **OK**.

Tip: Use the options in the **Tags** group to set importance, if necessary.

   - **To set response options:** on the **Meeting** tab, click **Response Options** in the **Attendees** group.
4. Create a message explaining the appointment or meeting in the space provided. When finished, click **Send**.

To create a Calendar entry from a Message: click and drag the message to **Calendar** on the Navigation Bar. Follow above steps to create an appointment or meeting entry on the Calendar.

Using the Scheduling Assistant for Meetings

The Scheduling Assistant displays the schedules of invitees connected to your Exchange Server, and can be useful in selecting a meeting time when all invitees will be free.

While scheduling a meeting: in the **Show** group, click **Scheduling Assistant**. Use the scroll bars to find times when all invitees will be available, then click a time slot. Busy time slots contain colored bars (*e.g.*, ▇). Once you've selected a free time, click **Appointment** to enter more meeting details.

Replying to a Meeting Request

Meeting requests appear in your Inbox with meeting icons.

To respond to a meeting request: right-click the meeting request and choose a response from the menu (*e.g.*, ✓ **Accept**). Alternatively, double-click to open the request and choose a response from the **Respond** group.

Tip: Click **Calendar** in the response menu or open the meeting request to see if the request conflicts with your schedule.

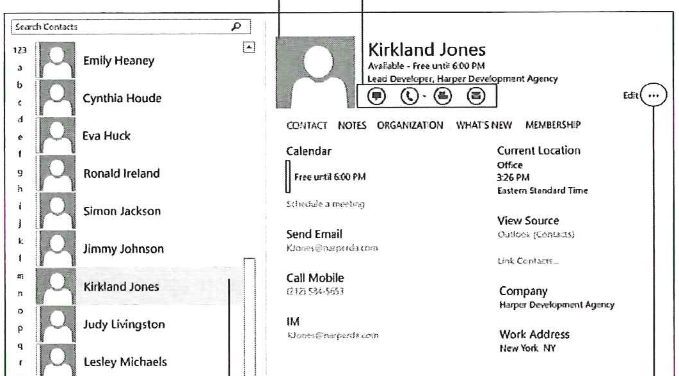
To respond to a meeting request with a message: select the message in the Message List and click **Reply**.

Working with the People List

Your address book in IBM Notes 9 is located in the Contacts window. In Microsoft Outlook 2016, you can find it in the People List. Click People in the Navigation Bar. On the Home tab in the Current View group, the People view makes it easy to manage and communicate with your contacts.

Your colleague's Exchange server status.

Click to communicate with a contact.



Click contact names to view or edit them, or right-click a name for more options.

Click and select **Link contacts** to combine multiple contacts for the same individual in one place.

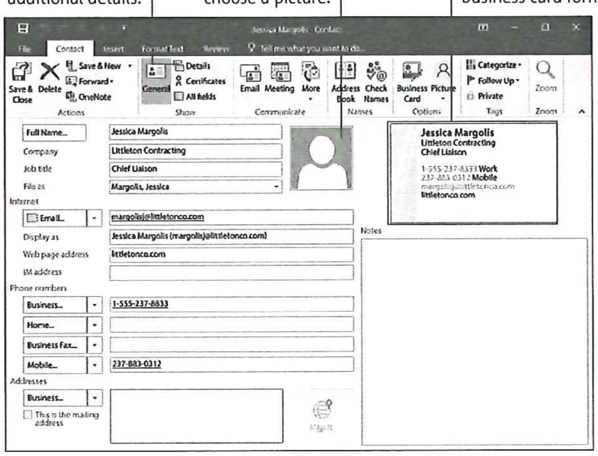
Creating a Contact

1. Click **People** in the Navigation Bar. On the **Home** tab, in the **New** group, click **New Contact**. Alternatively, press Ctrl+N.
2. Enter as much information as possible in the provided fields.

Click to enter additional details.

Double-click to choose a picture.

Double-click to edit the business card format.



Tip: Click the drop-down arrow boxes to add or change contact fields.

3. Click **Save & Close** to save the contact.

To create a Contact Group:

1. Click **New Contact Group** in the **New** group of the **Home** tab.
2. Click **Add Members** in the **Contact Group** tab, and choose an option. Add contacts as needed.
3. When finished, click **Save & Close** on the **Contact Group** tab. Contact Groups are listed in the People List.

To print a Contact Card: double-click a contact to open it. Click the **File** tab and then click **Print**.

Working with Tasks

Your IBM Notes 9 To Do items are now replaced with Microsoft Outlook 2016's Tasks feature. Tasks are to do items you can create for yourself or assign to others. Click Tasks in the Navigation bar to display the Tasks list.

Creating a New Task

1. Double-click a blank space on the Tasks list or, on the **Home** tab, click **New Task**. Alternatively, press Ctrl+N.
2. Name the task in the **Subject** field. If applicable, use the **Start date** and **Due date** areas to set a time frame, and complete the **Status, Priority,** and **% Complete** sections. Type details about the task in the composition area.

Reminders: check the **Reminder** box ☐ and use the drop-down controls to choose a date and time.

Recurring tasks: on the **Task** tab, click **Recurrence**. Choose when and how often the task will repeat, and click **OK**.

To view and edit task details: click **Details** in the **Show** group.

3. Click **Save & Close**. The task appears in your Tasks list and in the Calendar.

To create a Task from a Message: click and drag the message to **Tasks** on the Navigation Bar. Edit task details as needed and click **Save & Close**.

Assigning a Task to a Colleague

1. Double-click a blank space on the Tasks list or, on the **Home** tab, click **New Task**. Alternatively, press Ctrl+N.
2. In the new task window, click **Assign Task** in the **Manage Task** group.
3. Enter the contact name or email address in the **To** field.
4. Set additional task details (*e.g.*, **Due date**) as needed and click **Send**.

Responding to a Task Assigned to You

In your Inbox, double-click the task message (shown with a task icon). Choose a response from the **Respond** group on the **Home** tab (*e.g.*, ✓ **Accept**).

Note: Click **Assign Task** in the **Manage Task** group to delegate an assigned task.

To send a Status Report: with the assigned task open, click **Send Status Report** in the **Manage Task** group. Compose the message and click **Send**.

The To Do Bar

The **To-Do Bar** appears on the right side of the Outlook window and helps you keep track of your assigned tasks, scheduled meetings, and flagged messages.

To view the To-Do Bar: click the **To-Do Bar** button on the **View** tab, in the **Layout** group, and select the items you want to display. Select **Off** to close the To-Do bar.

Tip: Right-click items in the To-Do bar to work with them, or double-click calendar dates to go to them in your Calendar app.

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