FILE area for customising Outlook

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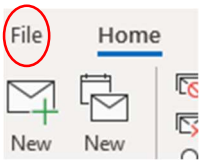
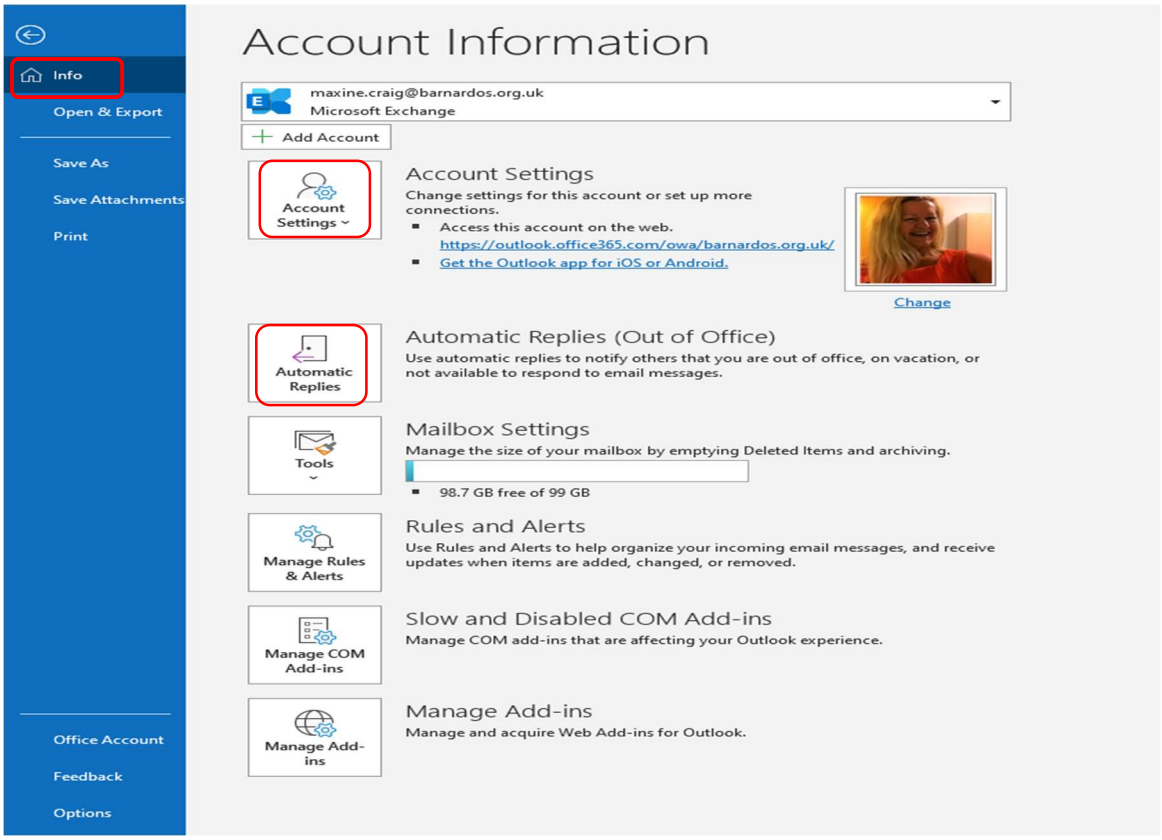
The File area in top left of your Outlook gives you access to a lot of tools to customise your Outlook, both for sending and receiving emails. It also gives you access to your Out of Office message, Account settings, and Rules and Alerts.



Info (Account Information)

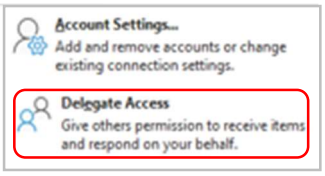
This is where you can switch on and set your Automatic Replies (out of office message), check how much storage you have left in your mailbox, set up rules and alerts and manage add-ins.



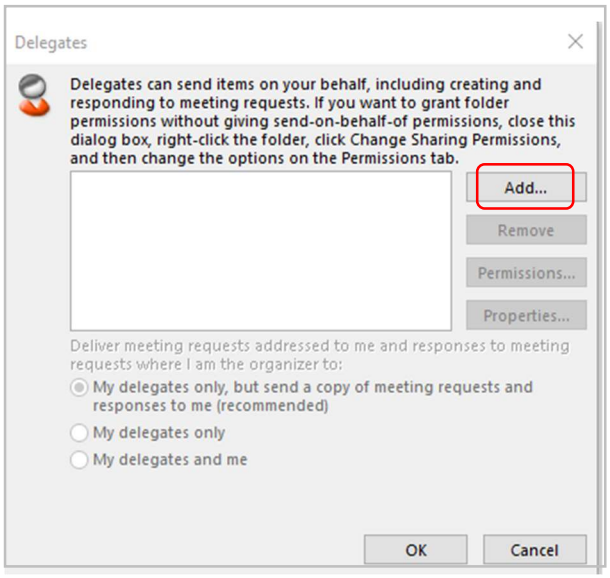
Account Settings – Delegate access

If you click onto the dropdown arrow on Account Settings, you can add someone (or more than one person) as a **Delegate** for your Outlook account. Delegates can perform some actions on your behalf, such as:

- Sending emails and replying to emails in your inbox
- Creating meetings in your calendar
- Responding to meetings you are invited to

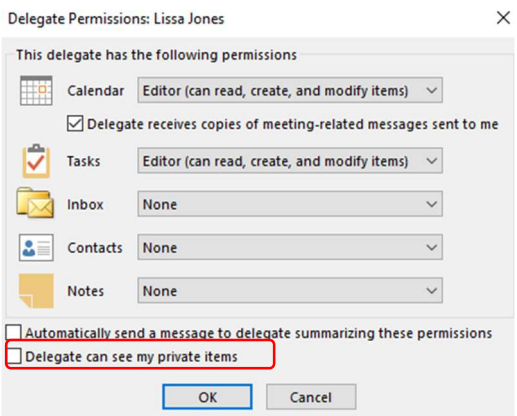


When you choose 'Delegate Access', a set-up box appears for you to add someone's name.

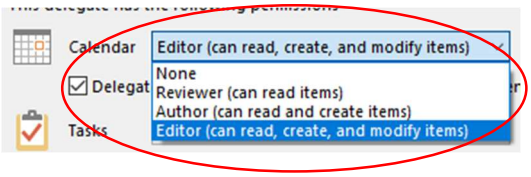


Click on 'Add' and the Global Address List opens for you to find the relevant name.

When you click OK, another box will open for you to set your controls for Calendar, Tasks Inbox, Contacts and Notes, although you may only want them to have editing rights to your calendar and/or your inbox.



Every dropdown has the same options: None, Reviewer, Editor or Author. Consider what you need your Delegate to undertake on your behalf – reading, creating or modification?

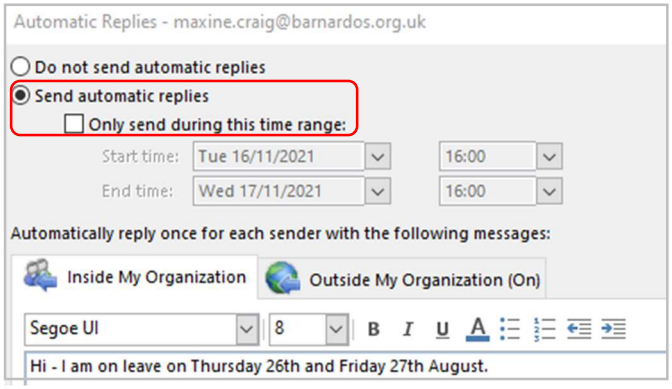


A Reviewer can only read items, an Author can read and create items, and Editor can read, create and change items.

As you can see, there is also a tick box to allow Delegates to see your items marked as Private, but this defaults to Off.

Automatic Replies

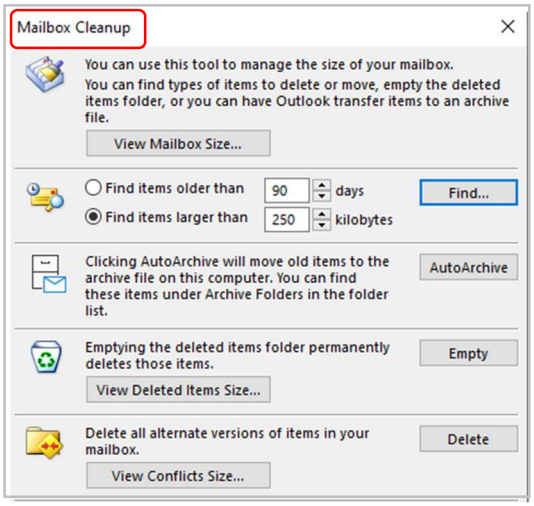
Set your Out of Office message here. You can choose either to have an automatic reply permanently with a relevant message or use the tick box to only have your message in a specific time range, e.g. whilst you are off work.



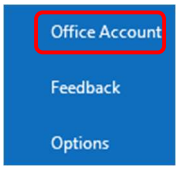
Remember to set a message both for internal colleagues and external senders as this may be different.

Mailbox Settings

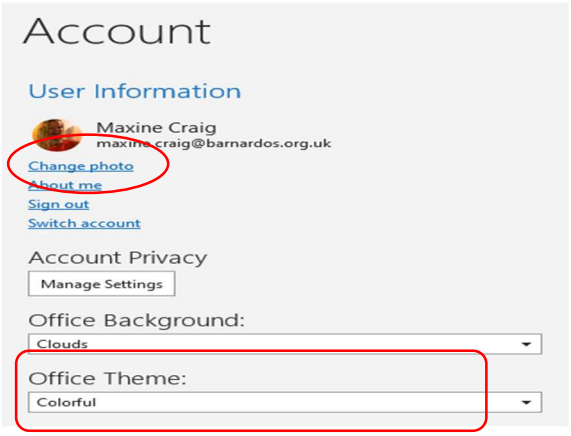
Here you can choose Mailbox Clean-up to perform commands such as finding items older than a set amount of days or larger than a set size, or auto-archive.



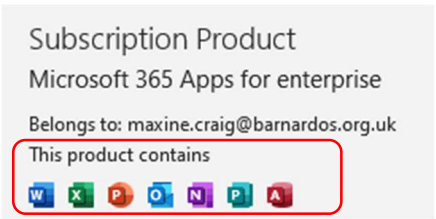
Office Account



You can easily change your Office Theme from 'colourful' to either grey, black or white. Or you can add/change your photo.

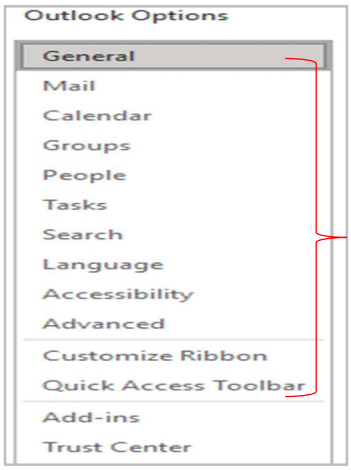


This area will also display the icons of the applications you have access to in Microsoft 365.



Options

Within Options at bottom left, you will find the sections and commands for customising Outlook to suit you. There are several categories, including General, Mail, Calendar, Groups, People, Tasks, Language, Accessibility**,** Advanced, Customise ribbon, and Quick access toolbar.

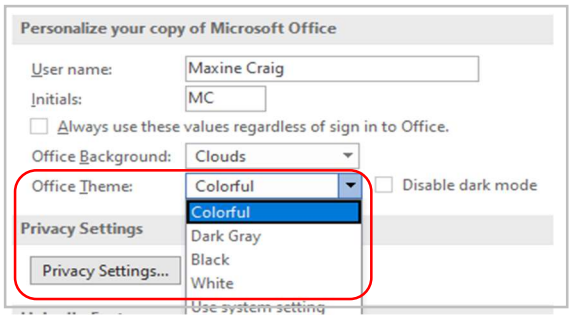


General

This section deals with general settings for working with Outlook, including personalising your Outlook, start-up options and attachment options.

Personalise Outlook

Here you can set your 'office theme' which changes the display colour for Outlook (and other Office apps such as Word, Excel, PowerPoint).

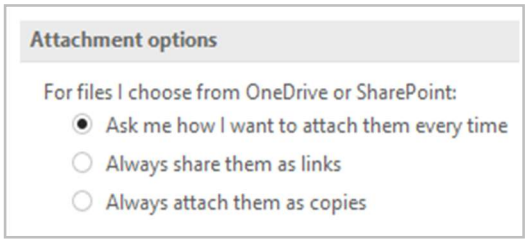


Use the drop-down arrow for Office Theme to set your preferred display mode.

- You can stay with 'colourful' which displays Outlook and Word with blue banners, Excel as green and PowerPoint as orange.
- The dark grey theme is for those who prefer softer visuals.
- The black theme provides the highest-contrast visual.
- The white theme displays the classic look of Office.

Attachment options

This is where you set how you want to attach documents from OneDrive. The default is 'ask me how I want to attach them every time' so if that is what you prefer, you don't have to do anything.



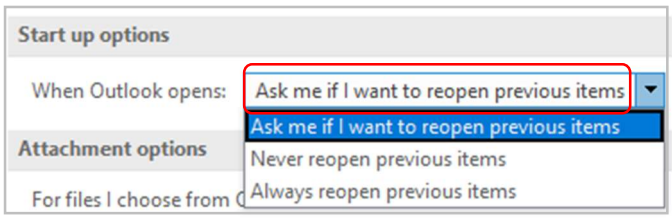
If you want control each time you attach a file, leave the default on as above, but if you always want to attach as a copy or always want to share as links instead, choose the relevant option.

To clarify – **a copy** takes up space on your email and each person you send the document to has their own copy so any changes made will have to be collated by you. **Sharing as a link** allows more than one of you to open and work on a document at the same time, plus is useful for large files that emails won't be able to send.

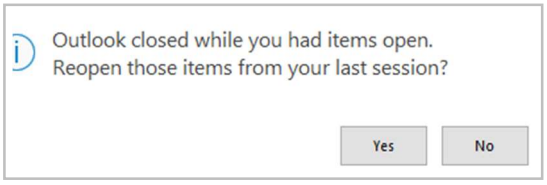
Start-up options

This reopens any Outlook windows that were live when Outlook closed, meaning that open emails and meetings can reappear automatically when Outlook restarts.

This will work no matter how Outlook closed down – a crash, system update or manually closed.



The 'ask me' option is on by default. If there were open items last time, Outlook will start with a prompt -



But if you want a more definite result, choose 'never reopen' or 'always reopen'.

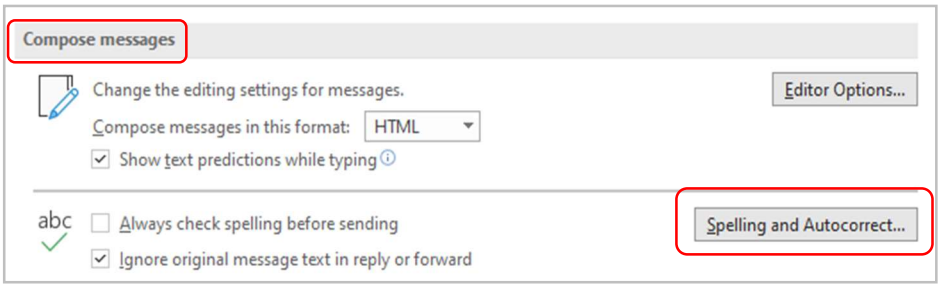
Mail

The Mail section within Options is where you change the settings for messages you create and receive. There are settings for composing messages, message arrival, conversation clean-up, replies and forwards, saving messages sending messages, MailTips and tracking.

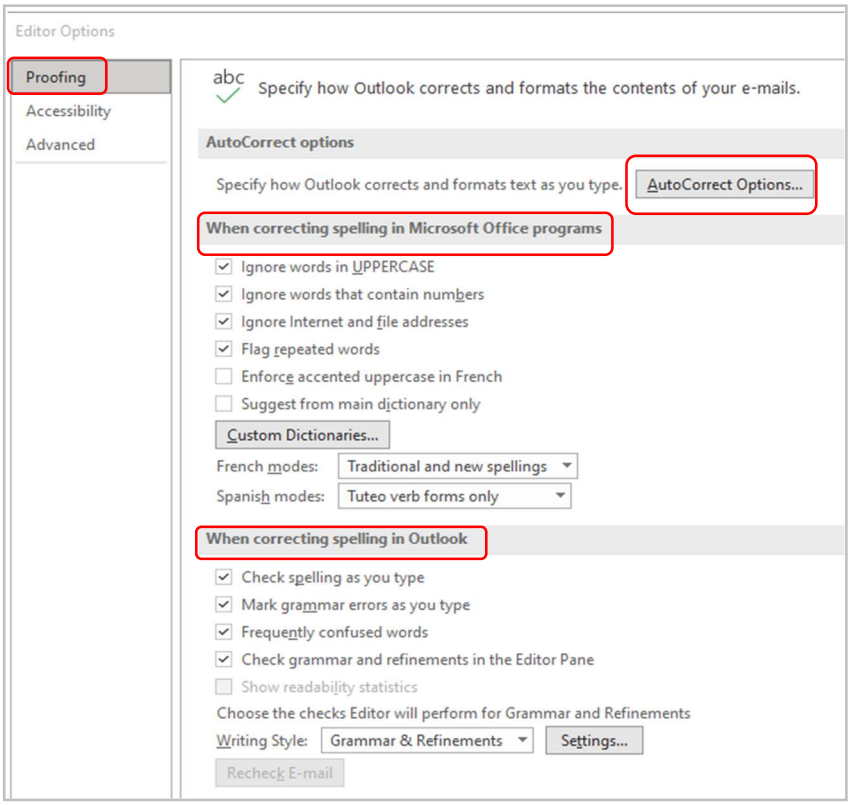
Compose messages

Under this section, you'll find Spelling and AutoCorrect options and your email signature setting.

Spelling and Autocorrect

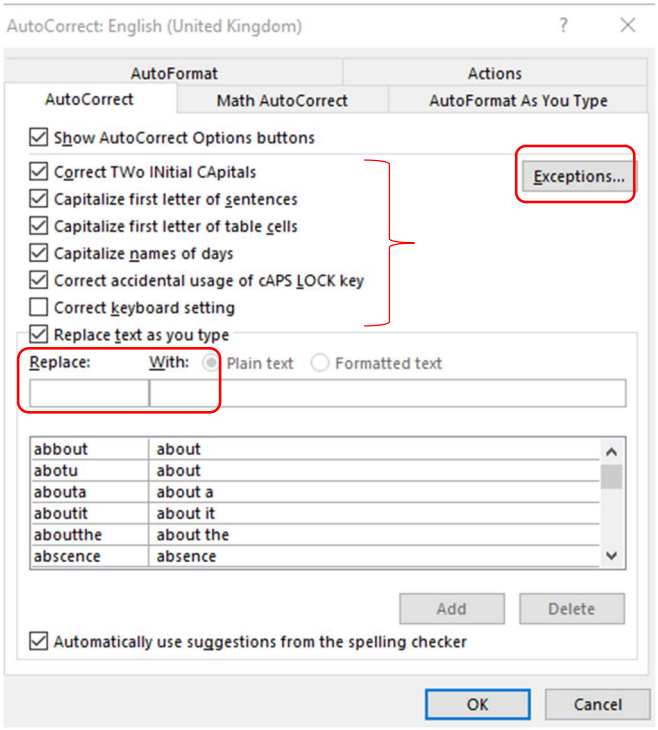


When you click onto the 'Spelling and AutoCorrect' button, you are taken into 'Proofing', which is a really useful area that allows you to set AutoCorrect options and spelling and grammar rules that suit you.



Proofing - AutoCorrect Options:

Do you repeatedly mis-type or struggle to spell the same word? AutoCorrect lets you manually add to a pre-loaded list of frequently mis-typed and mis-spelt words. There are already many words in this list that Microsoft knows are frequently mis-typed or spelled incorrectly.



In the 'Replace' field, type the word you want to add to the AutoCorrect list – **remember to add the mis-spelt/mis-typed version here!**

Then type the correct spelling into the 'With' field.

Then press **'Add'** and your word will be added to the list. Whenever you type the wrong spelling, it will be auto-corrected as soon as you click space or tab after it.

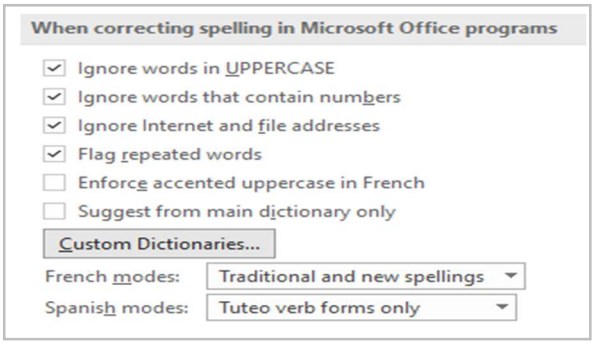
Also in this AutoCorrect box are tick boxes for the system to automatically correct when you type two capital letters and the rest of a word in lower case, to capitalise the names of days and first letter of a new sentence, to correct accidental usage of Caps lock, and to replace text as you type. (which links to the tick box for 'automatically use suggestions from the spelling checker).

In the Exceptions button, you can add words or abbreviations that are NOT to be corrected. For example, something like PAs or IDs would normally fall under the 'two capital letters' correction but need to be an exception as they are commonly used in this form.

Proofing - When correcting spelling in Office programs

This sub-section has tick boxes for you to tell Office to ignore words in uppercase, ignore words containing numbers, and warn you when you repeat words, such as 'the the'.

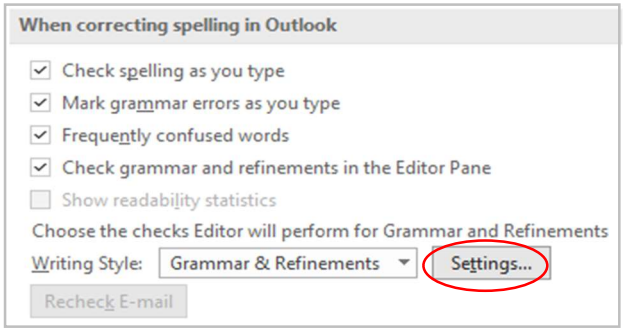
Note that this is for all your Office programs, including Word and PowerPoint.



Proofing - When correcting spelling in Outlook

This sub-section allows you to switch on or off the following – check spelling and marking grammar mistakes as you type, highlight frequently confused words, and check grammar and refinements using Editor.

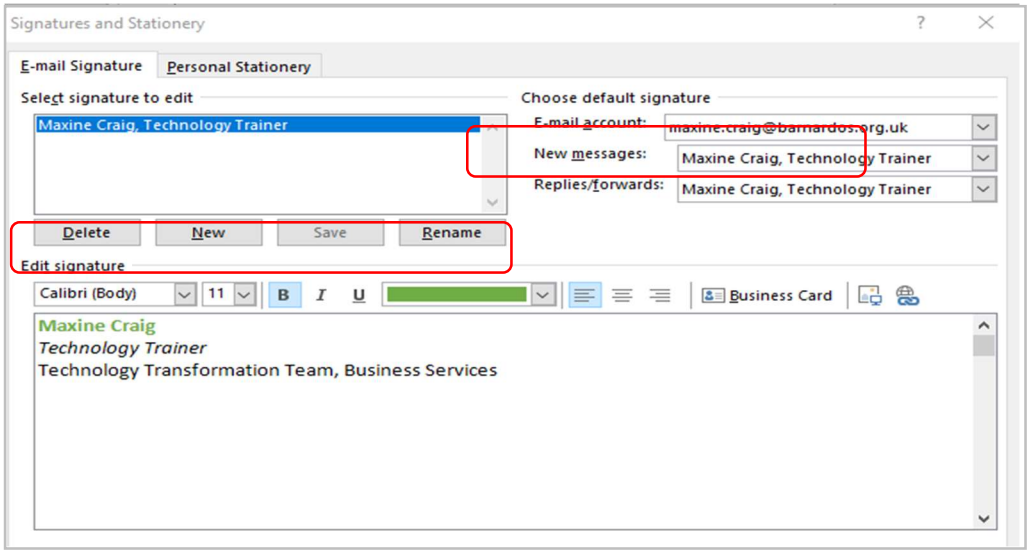
Under the 'Writing Style' you can also go into Settings and see a long list of points for grammar, clarity, conciseness, formality, inclusiveness, vocabulary and punctuation that your writing is checked against. You can switch any of these on or off.



Signatures

Still under 'Compose messages' section, you can set your signature for emails.

Click onto 'Signatures' and you see the set-up box.

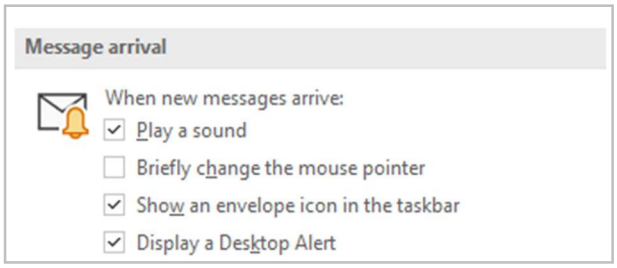


Here you can change your email signature or add to it. You can also add edit the colour, font or size using the tools under 'Edit signature'.

You can set your signature to appear on new outgoing messages and/or on replies and forwards.

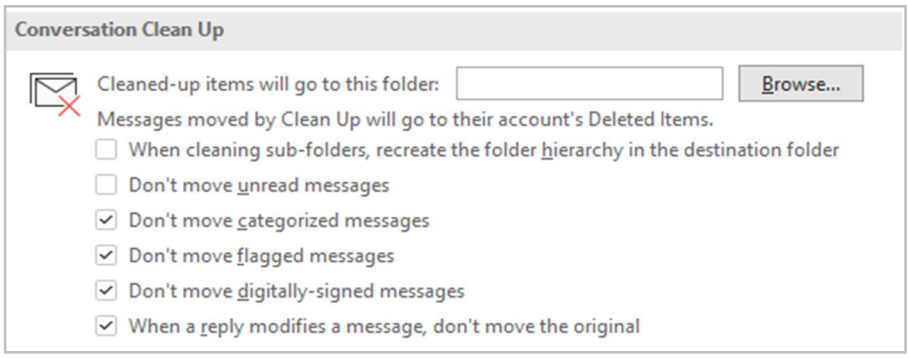
Message Arrival

You can set a few alerts: have a sound played when a new email arrives in your inbox, show an envelope on your Outlook icon in the bottom taskbar, or display a desktop alert. By default, these three are already switched on for you.



Conversation Clean-up

The Clean-up tool is a really useful and easy way of keeping your inbox tidy and free from clutter (or any folder you choose)



Clean Up evaluates the contents of each message in every email conversation. If a message is completely included within one of the following replies, the previous message is deleted as it is not needed separately.

The section above lets you set some commands for how clean-up works for you.

Please see the separate user guide for Conversation Clean-up on the Inside Barnardos Outlook training page.

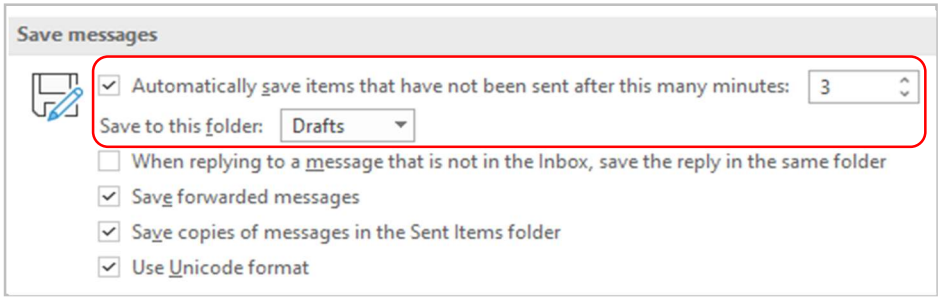
https://inside.barnardos.org.uk/outlook-training-and-guidance

Save messages

This sub-section has an important tick box that lets Outlook automatically save an unfinished email into the Drafts folder, although you can even change which folder it is saved in (Inbox, Sent or Outbox).

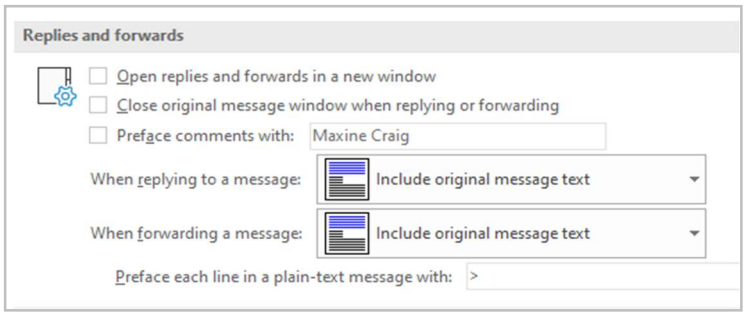
Default time after which it saves is 3 minutes, but you can set anything between 1 minute to 99 minutes (if you choose 0 minutes, it unticks this box).

You can also save forwarded messages and save copies of replies in your Sent folder. Or you can set a reply to be saved in the same folder in which the original is stored.



Replies and forwards

This sub-section allows you to set some rules around what happens when you reply to or forward a message.



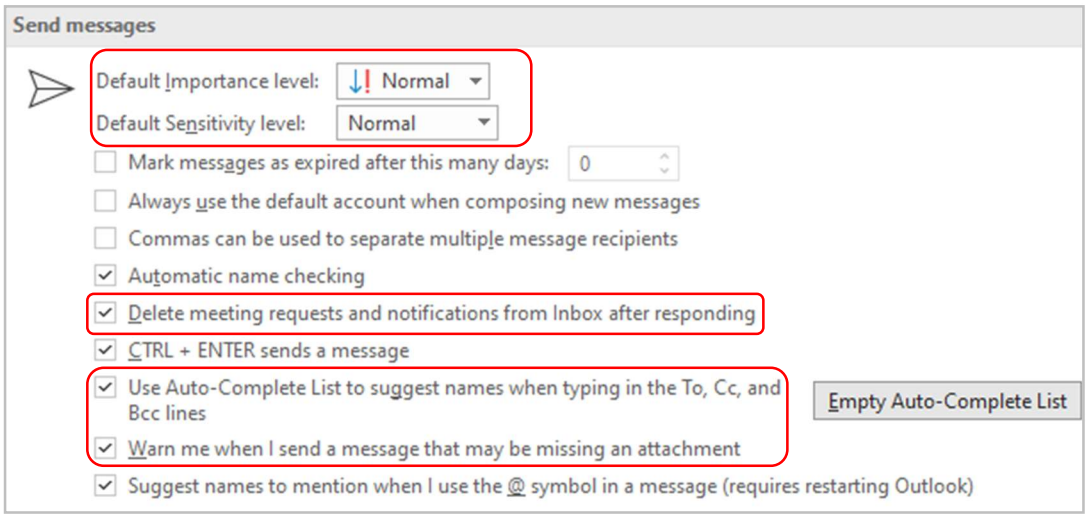
Do you want to open a new window when you create your reply messages?

Do you want to close the original message when replying /forwarding?

Did you know that when replying to or forwarding an email, you can choose what is included of the original? The default for both, as above, is 'include original message text' but - as seen below- you can amend this to not include original message, include original message as an attachment instead, indent the original message, or prefix each line of the original. The small picture next to each option shows you the layout of that choice.

Send messages

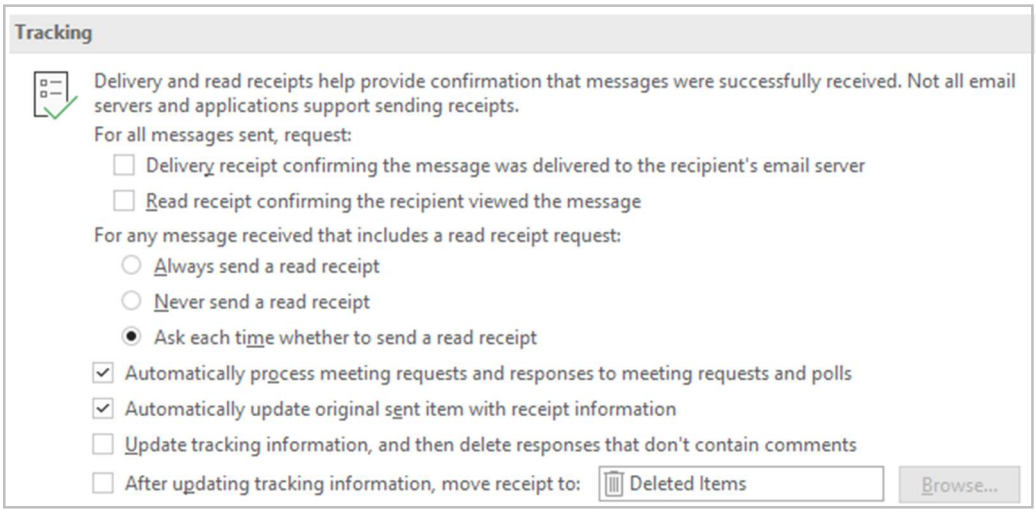
This sub-section allows you to set some rules around your sent emails.



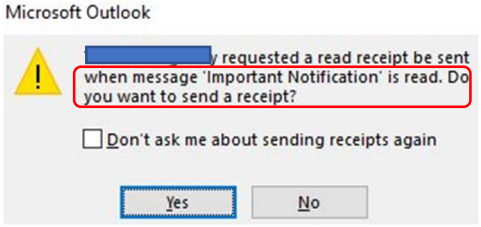
- You can change your default importance and sensitivity levels from Normal to Low or High.
- You can set it so a comma can separate multiple recipients' addresses.
- You can have meeting requests auto-deleted from your inbox once you have responded.
- You have an Auto-Complete list which suggests names you start to type in To fields.
- You have a tick box to remind you if Outlook thinks you should have attached a file (it takes its cue from what you have typed into the email body).

Tracking

This is where you can set 'delivery receipt' or 'read receipt' for all your sent messages (of course, you can also do it on an individual basis via the commands within each email). *Remember that the delivery receipt does not mean that your email has been read, merely delivered to their inbox.*



You can also choose what to do if a message you receive has a 'read receipt' request – always send, never send or ask each time. Therefore, it is important to remember that your recipients also have a choice whether or not you get a read receipt and that no read receipt does not mean they have not read your email.



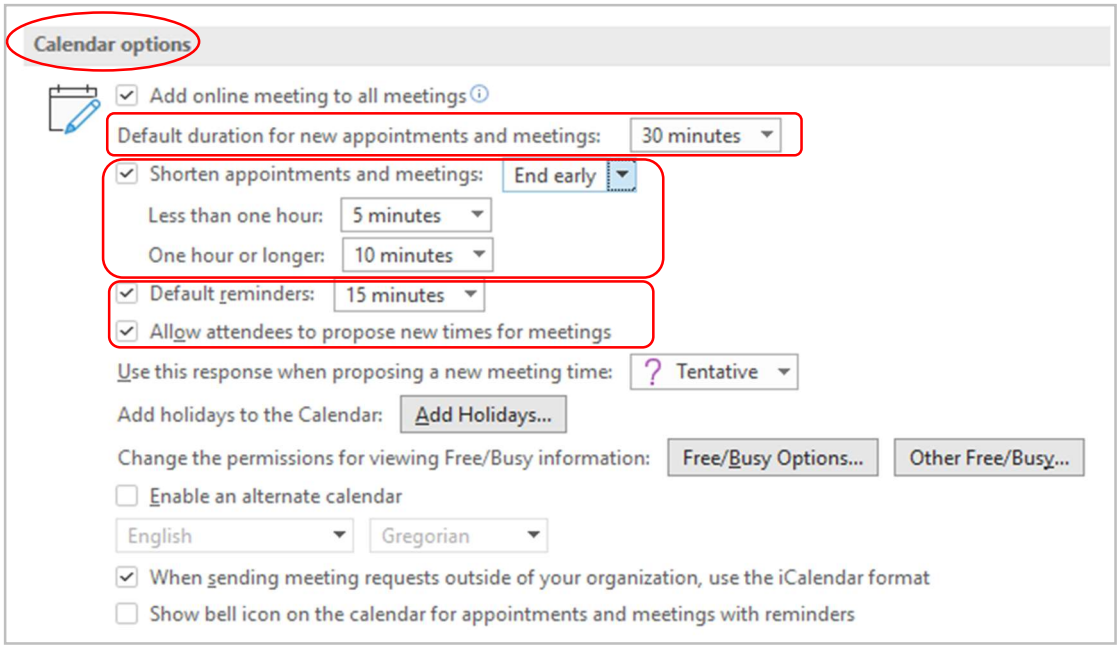
If the recipient does say Yes, you receive a message telling you the time and date of viewing.

Calendar

In the calendar section you can change the view of your calendar, set defaults on meetings and reminders, shorten meetings automatically, or change the time zone on your Outlook.

Calendar Options

Useful settings in this section include adding online meeting capabilities to all meetings, setting the default duration of new appointments/meetings, shortening appointments by having them start later or finish earlier than the full hour, changing the default reminder of 15 mins, setting allowance for invitees to propose new times.



Default duration

When you create a new meeting, Outlook automatically makes it 30 minutes long. If you want another default, choose between 30 mins, 1 hour, 1.5 hours or 2 hours.

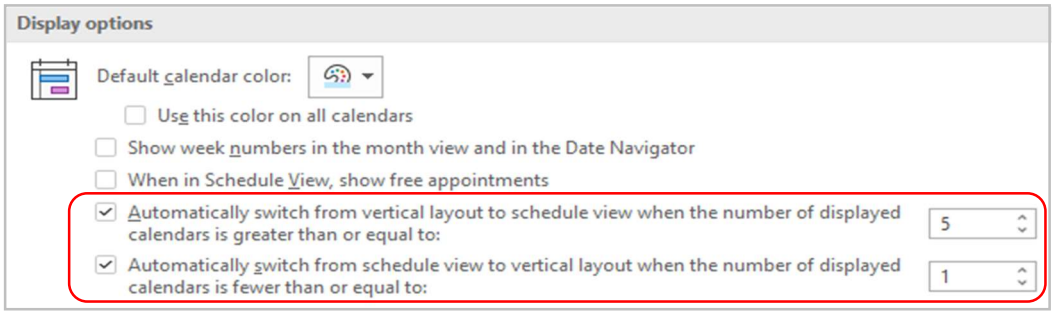
Shortening meetings

This enables you to adapt the meetings you create so that they are not 'back-to-back'. For a meeting shorter than one hour, you can choose to start a meeting 5/8/10 minutes late or end a meeting 5/8/10 minutes early, even when you have booked 'on the hour' in your calendar. If the meeting is one hour or longer, the choices are 5/10/15 minutes. This gives people time to have a small comfort break if they have a lot of meetings.

Default reminder

If you are someone that likes a reminder to be half an hour before a meeting, or 5 minutes before rather than the default 15 minutes, you can set it here. There is a range of timescales from 0 minutes to 30 mins, from 1 hour to 18 hours, or 1-4 days and 1-2 weeks.

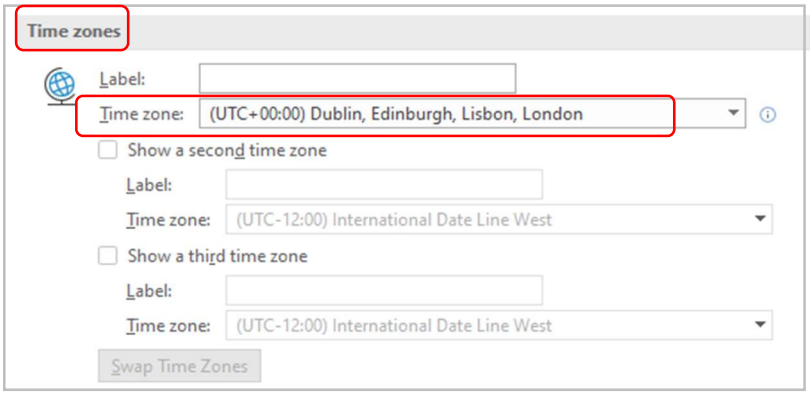
Display options



The default maximum number of calendars displayed in vertical view is 5, which means when you open 6 or more calendars to look at, Outlook automatically switches to Schedule View to make it easier for you to see all calendars. You can change this via the dropdown arrow (from 2 up to 30).

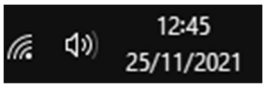
The default minimum number of calendars displayed in vertical view is 1, which means when you open one calendar to look at, Outlook will always open it in vertical view unless you choose another view. You can change this via the dropdown arrow (from 1 up to 29).

Time Zones



At any time, you can change the time zone in Outlook so that it matches your current geographic location. Changing the time zone in Outlook is the same as changing it in the Windows Control Panel, and the change is reflected in the time displays in all other Microsoft Windows-based programs.

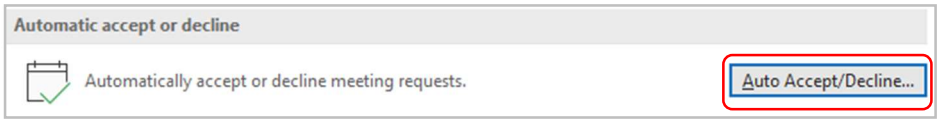
Click the time zone you want to use. When you change time zones, the Windows clock in bottom right of your screen changes too.



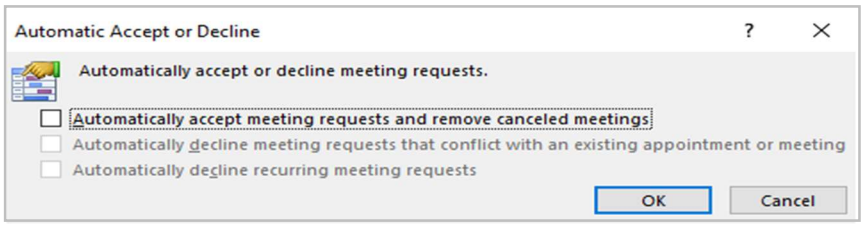
For more help on Time Zones and how to use a second and third time zone, please see Microsoft's 'Add, remove or change a time zone' page.

https://support.microsoft.com/en-us/office/add-remove-or-change-time-zones-5ab3e10e-5a6c-46af-ab48-156fedf70c04

Automatic accept or decline



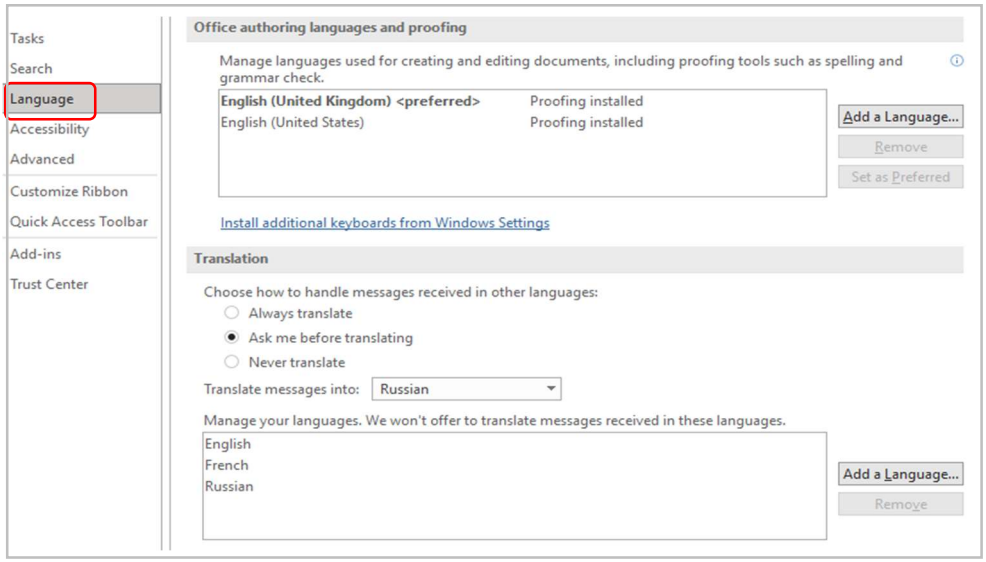
You can set auto-actions on meeting invites. Click onto the Auto Accept/Decline button and an options box appears for you to tick to either 'automatically accept meeting requests and remove cancelled meetings', or 'auto- decline meeting requests that clash with an existing meeting', or 'auto-decline recurring meeting requests.



Language

The language section of Options is where you set your language preferences for Office. Note that this is for all Office programs, not just Outlook.

Default is English so you do not have to do anything if this is the language you work in.



However, if you regularly work in another language, you can set it to proofing so Office runs the same grammar and spelling checks as it does in English.

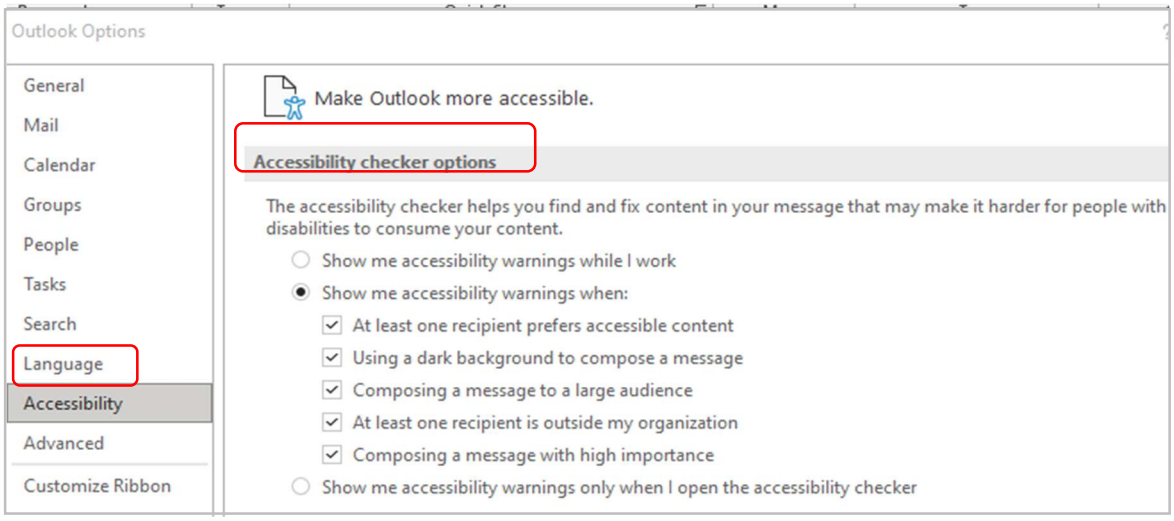
You can also set how Outlook deals with emails received in other languages.

For further help with the proofing and translation tools in Outlook, please see the separate Microsoft Translation Tools guide on inside Barnardos.

https://inside.barnardos.org.uk/microsoft-365-translation-tools

Accessibility

This section in Options helps you to make Outlook more accessible.



Accessibility checker options

This finds and advises you to fix content in your email that could make it harder for people with disabilities to read or understand your text.

You can tick or untick the various settings above, including either show accessibility warning whilst you work or only show them in certain instances such as when composing to a large audience or with high importance.

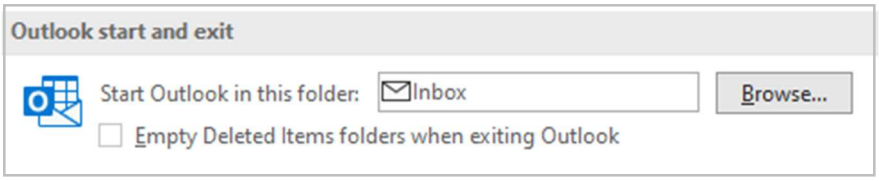
Automatic Alt Text

Alt text helps people with screen readers to understand what your pictures are showing. You can generate a description automatically or input Alt Text manually.

Advanced

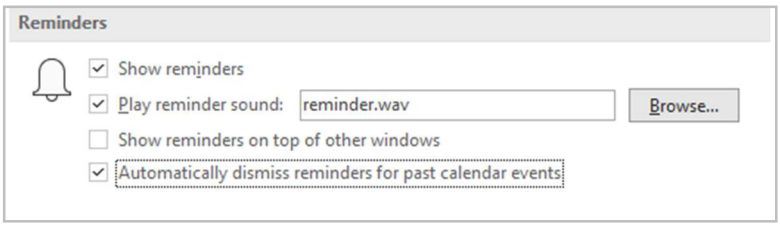
The Advanced section of Options presents some more advanced ways of working with Outlook.

Outlook start and exit



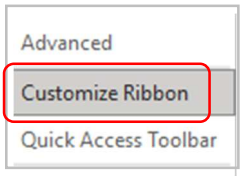
Here, you can set Outlook to start with a certain folder (default is Inbox) , or for it to empty your deleted folder each time you leave.

Reminders

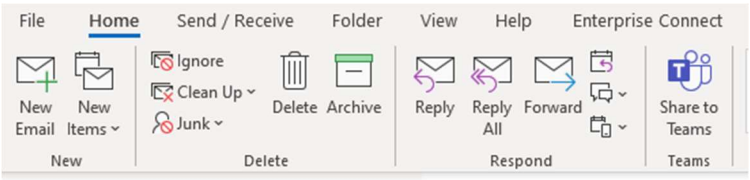


You can switch off reminders for calendar events and automatically dismiss reminders that are for past events.

Customise ribbon



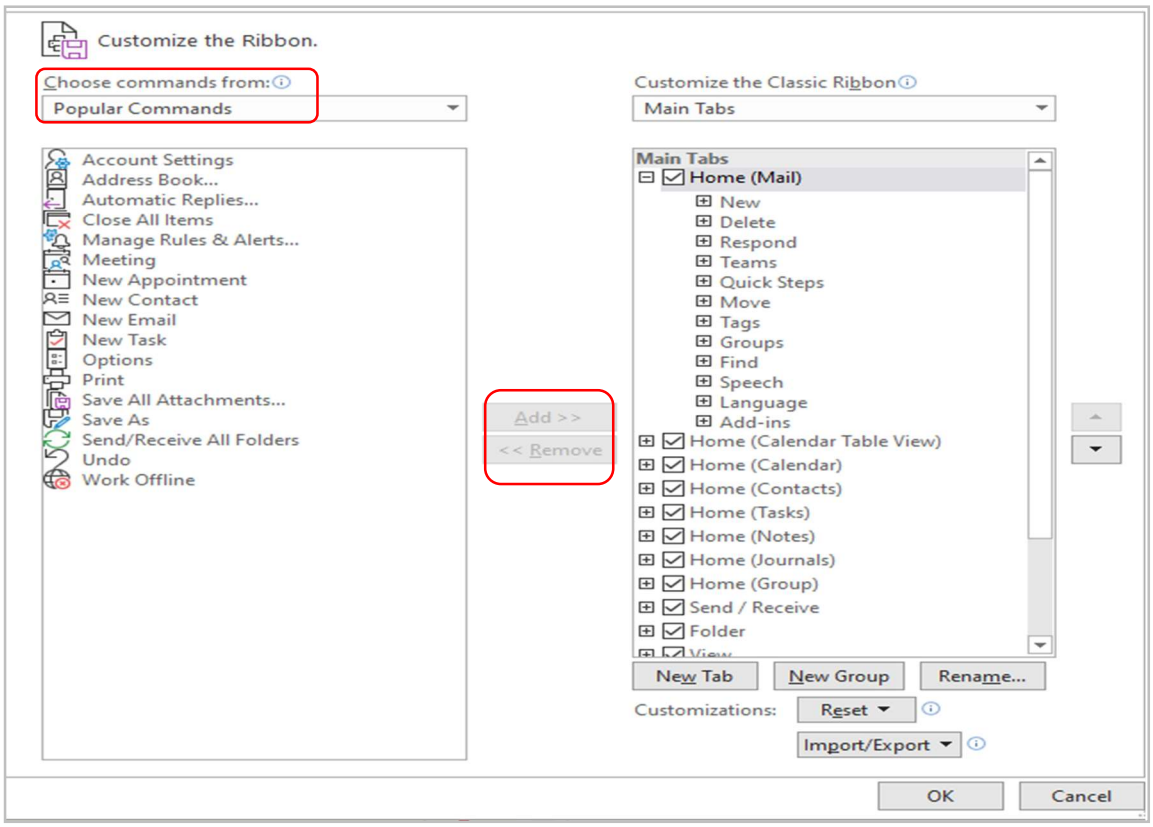
Your ribbon is the space that runs along the top of your Outlook. It has tabs called File, Home, Send/Receive, Folder, View, Help and Enterprise Connect. Each tab has 'groups' that are a set of related functions under that tab.



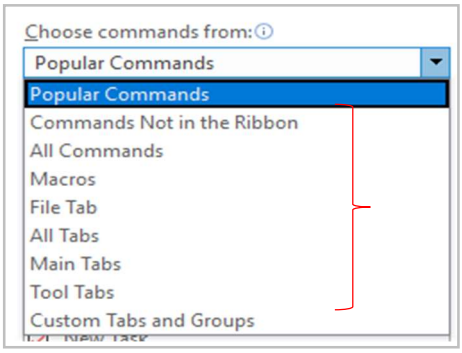
These are your default tabs and groups, but you can add to the ribbon or remove any that you never use.

Click onto 'Customise ribbon' and it will open an options box.

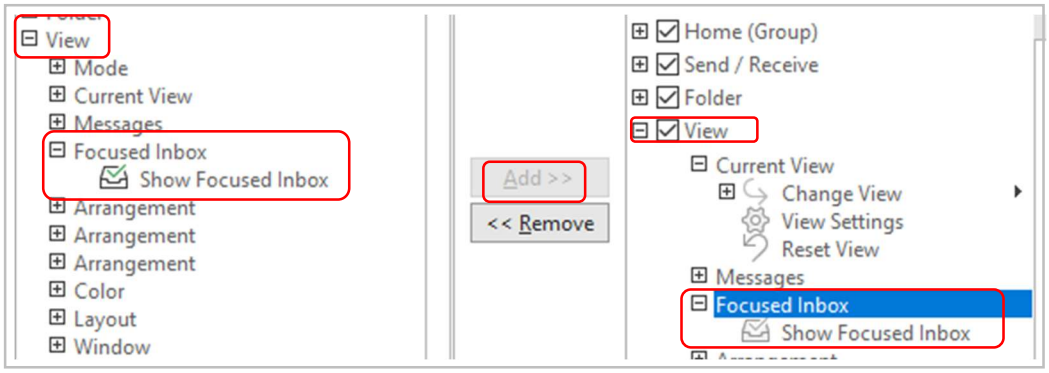
It looks complicated but just remember that on the left are the things you could add, and on the right are the things you already have on your ribbon. In the middle are your **Add/Remove** buttons (these are greyed out until you click onto either column)



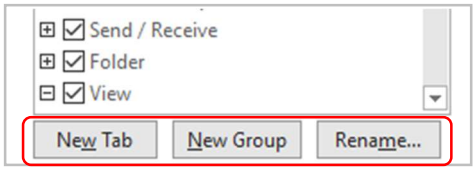
In the ‘Choose commands from’ dropdown, you can see the default is ‘Popular Commands’, but you can change this to All Commands to give you a full list to choose from.



Or you can select a single tab to add commands into – such as the View tab, For example, if you know you will never use Focused Inbox, you could remove it from your ribbon.



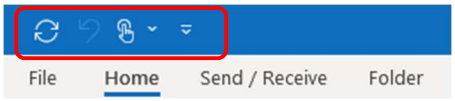
You can even create your own tab and customise it.



Quick Access Toolbar

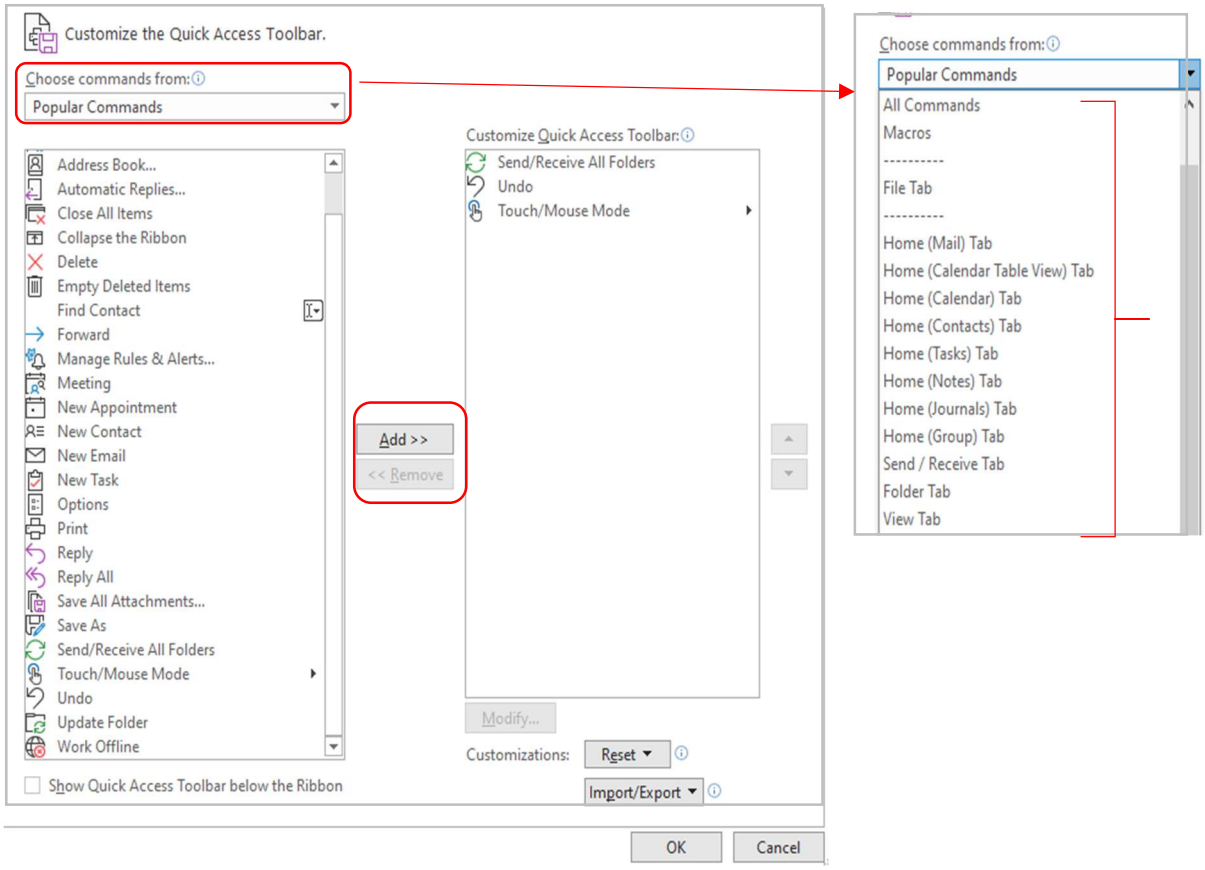
In the same way as customising your ribbon, you can also customise your Quick Access Toolbar.

The Quick Access toolbar is the small area that runs along the very top left of your Outlook (and Word, Excel, etc). It gives you quick access to the commands you put there, rather than going along the tabs and groups to find them.



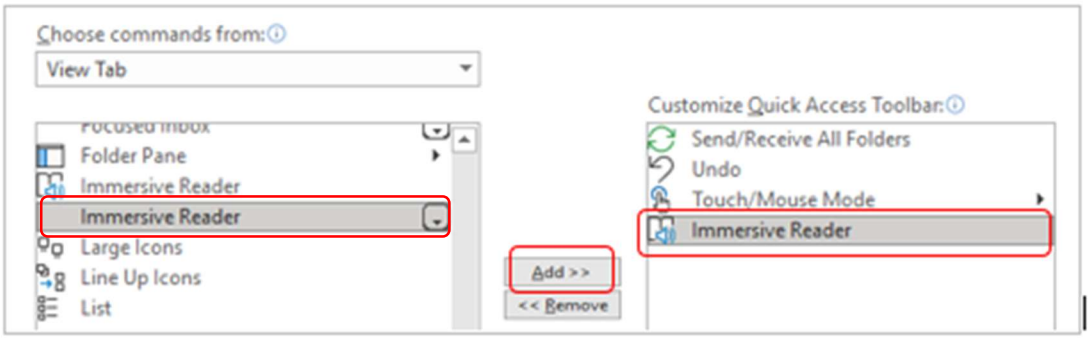
If you click onto the small downwards arrow and choose ‘More Commands’ or click onto the Quick Access Toolbar area in Options, a command box will open.

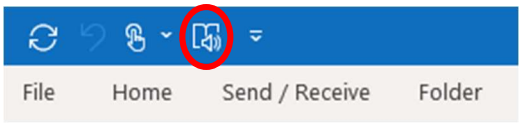
Your available-to-add commands are on the left, and your current QA toolbar commands are on the right.



Find what you want in the list on the left. It defaults to Popular commands, but if you can’t find what you want in that list, just use the drop-down arrow to select something else like All Commands, Home Tab commands, etc.

Click onto the command you want to add to your quick access area and then press ‘Add’ so it appears in the list on the right.
For example, adding ‘Immersive Reader’ below:



Click on OK.

It is now in your quick access area along the top of Outlook and will remain there.