

e-Contacts EP instructions for Outlook 2016

1. General
2. Closing a prior version of **e-Contacts EP** in Outlook
3. Opening **e-Contacts EP** in Outlook
4. Using the predefined list views
5. Creating custom views
6. Copying and exporting lists
7. Group mailings
 - 7.1 Creating mailings or printing labels in Word
 - 7.2 Group Faxes
 - 7.3 Group E-mails
8. Assistants

1. General

These instructions describe how to install and use **e-Contacts EP**. They are based on Microsoft Outlook 2016. Mailings through e-mail, fax, printout, etc. depend on your installations. Below, we describe various methods of selecting and preparing data for mailings and other purposes.

Instructions assume the user's basic general familiarity with the Microsoft Windows environment and with basic standard operations such as "drag-and-drop", "cut-and-paste", use of menus and dialogue boxes, etc.

e-Contacts EP is an "outlook data file" file (.pst), the standard format used and created by MS Outlook. Its use follows the standard Outlook procedures, as described in Outlook Help (accessible e.g. by pressing the "F1" function key on your keyboard). **e-Contacts EP** is also available in alternative formats (Excel, Access, CSV) which are compatible with other database and communications software's.

If at any point you have a question not answered by this documentation or Outlook Help, you may:

- Check the Microsoft Office Outlook site:
<https://products.office.com/nl-be/outlook/email-and-calendar-software-microsoft-outlook>
- E-mail questions to: **e-contactsep@eamonnbates.com**

Abbreviations:

You have the possibility to sort members of a Committee, Delegation or Other Body by their job position, simply by clicking on the "Company" column:

- Chairs of a Committee, Delegation or Other Body are identified by the suffix "**-Ch**";
- Vice-Chairs of a Committee, Delegation or Other Body are identified by the suffix "**-VC**";

- Political Group Coordinators and Deputy Political Group Coordinators of a Committee are identified by the suffix “-GC” and “-DGC”;
- The President of the Parliament’s Bureau and of the Conference of Presidents (MEP Martin Schulz) is identified by the suffix “-Pr”;
- As before, regular Members of a Committee, Delegation or Other Body have no suffix;
- As before, Substitute members of a Committee or Delegation are identified by the suffix “-S”.

NB: The Committee for Economic and Monetary Affairs, the Committee for Employment and Social Affairs and the Committee for Internal Market and Consumer Protection have an additional position (Deputy Group Coordinator), which is identified by suffix “-DGC”.

NB 2: The Delegation for the ACP-EU Joint Parliamentary Assembly does not have a Chair, it has a “Co-President”. The identifying suffix is “-CP”.

All the information about MEP Activities (i.e. Committees, Delegations, Other Bodies) is organized in a way to make the product easy to use. Activities are categorized as follows:

- Names of Committees are preceded by “C - ”;
- Names of Delegations are preceded by “D - ”;
- Names of “Other Bodies” are preceded by “O - ”.

Here are some practical examples:

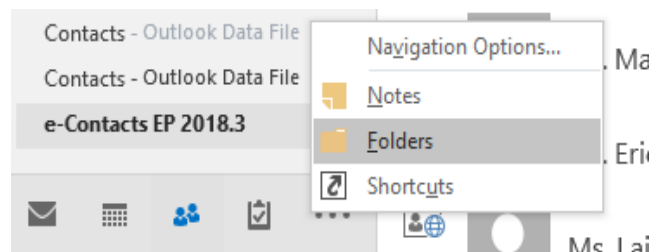
- “C - **AgricultureRuralDevelopment-Ch**” refers to the Chair of the Committee on Agriculture and Rural Development;
- “D - **Canada-VC**” refers to a Vice-Chair of the Delegation for relations with Canada;
- “O - **Conference of Committee Chairs-Ch**” refers to the Chair of the Conference of Committee Chairs.

2. Closing a prior version of e-Contacts EP in Outlook

If you are installing **e-Contacts EP** for the first time you can skip this section and go straight to chapter 3.

Although new versions of **e-Contacts EP** may co-exist with older ones, it is recommended you delete old versions from both Outlook and your hard disk.

However, if you have entered your own data into the old Outlook file, this will also disappear. In this case, it will, therefore, be necessary to keep and manually transfer this information.



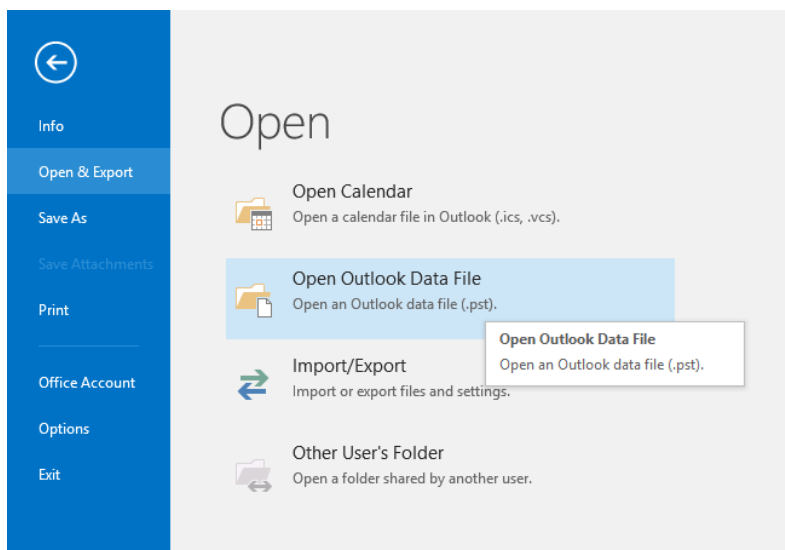
1. Make sure that the **Folder List** is visible.
2. In the **Folder List**, right-click on “e-Contacts EP xxxx.x” and click on “Close e-Contacts EP xxxx.x”.
3. To delete the old **e-Contacts EP** file from your hard disk, make sure Outlook is closed and then delete the old version of **e-Contacts EP** from your custom location.

If you are sharing **e-Contacts EP** as a MS Exchange Public Folder, select it in the **Folder List** (under **All Public Folders**) and delete it. This will remove all data from MS Exchange Server.

3. Opening e-Contacts EP in Outlook

Before you can use **e-Contacts EP** you need to copy the data file to your hard disk and make it readily available for Outlook.

1. Make sure no previous version of **e-Contacts EP** is open in Outlook. If so, we advise you to close and delete it (see chapter 2 above).
2. Double-click on the outlook file attachment in the email (e-Contacts EP xxxx.x) and save the zip file.
3. Extract the compressed file and save the outlook data file in a location of your choice.
4. On the Outlook menu, select the **File** tab and then **Open / Open Outlook Data File...**



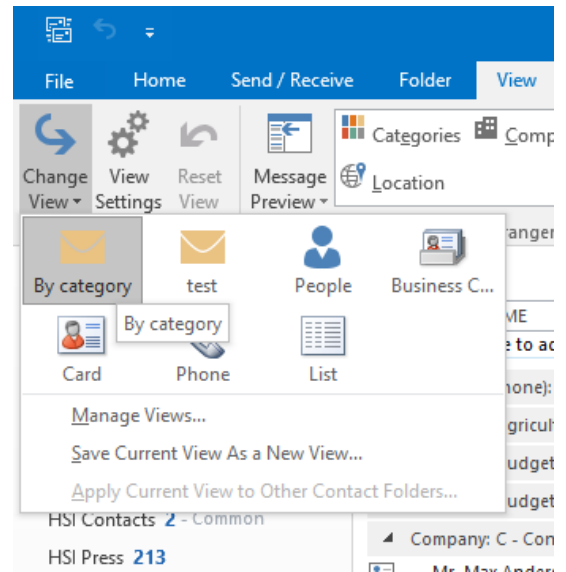
5. Navigate to the folder where you saved the outlook data file, select and open it.
6. You will see that "e-Contacts EP xxxx.x" has appeared in the **Folder List**. Click on the **People** tab to view the full list of MEPs.
7. If you want to share **e-Contacts EP** as an MS Exchange Public Folder on the network copy it into your **All Public Folders**. You can achieve this by clicking on the "e-Contacts EP xxxx.x" folder and dragging it to **All Public Folders**.

4. Using the pre-defined list of views

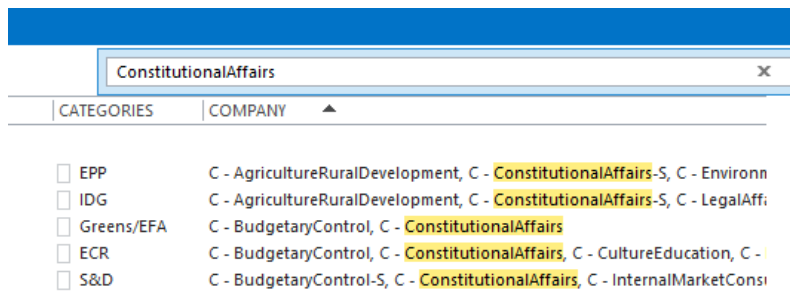
Views can be used for printout, mail merges or for copy and paste into other programs. Some standard views are available in Outlook. You may also consider creating a custom view if you would like to select/regroup MEPs in a different manner (see next chapter).

To choose a pre-defined view:

1. Clicking on the **View** tab and then on **Change View** will display the pre-defined views.
2. Clicking on an entry will activate that view.



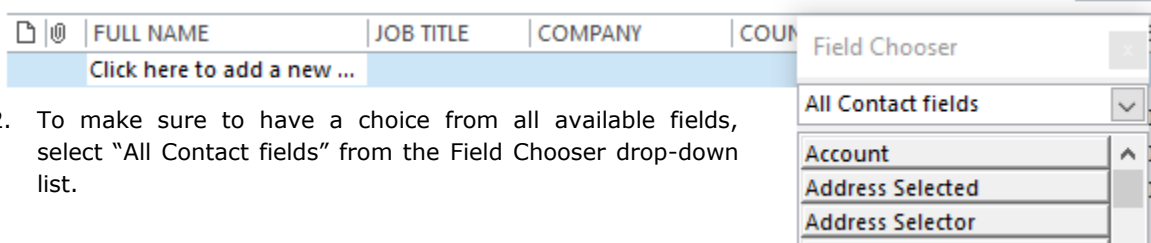
To view assorted contacts, such as members of the Constitutional Affairs Committee for example, select "By Category" from the "Change View" list box. This will display a collapsed view of all MEPs, grouped in the EP Committees they belong to. (Remember: each Committee has a Chair as in "C - ConstitutionalAffairs-**Ch**", a number of Vice-Chairs as in "C - ConstitutionalAffairs -**VC**"), a number of Political Group Coordinators as in "C - ConstitutionalAffairs -**GC**", a set of regular Members as in "C - ConstitutionalAffairs", and a set of Substitute Members as in "C - ConstitutionalAffairs -**S**").



To display additional fields:

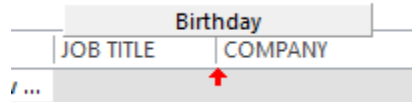
In addition to the displayed fields (e.g. Full Name, Company (Political Group), E-Mail, Category, Business Phone, Business Fax), you may require other fields. To add other fields to the view:

1. Right-click on the "Column Header Row" (displayed below) and select "Field Chooser" from the menu.



2. To make sure to have a choice from all available fields, select "All Contact fields" from the Field Chooser drop-down list.

3. Scroll down, click on "Birthday" for example, and drag it (keeping the left mouse button pressed) to the "Column Header Row" where you want to place it.



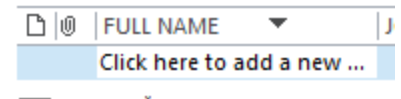
4. To change the position of a field, drag its heading to another position in the "Column Header Row".
5. To delete a field, drag its heading down until it is displayed with an "X". Drop to delete from view.

To rename Column Headers in a view:

1. Right-click on the "Column Header Row".
2. On the drop-down menu, select "View settings", followed by "Format Columns".
3. Change the entry in the "Label:" field.

To sort by a field:

Click on the corresponding Column Header. Clicking once will sort by ascending; clicking again will sort by descending order (as displayed by the arrow).



5. Creating custom views

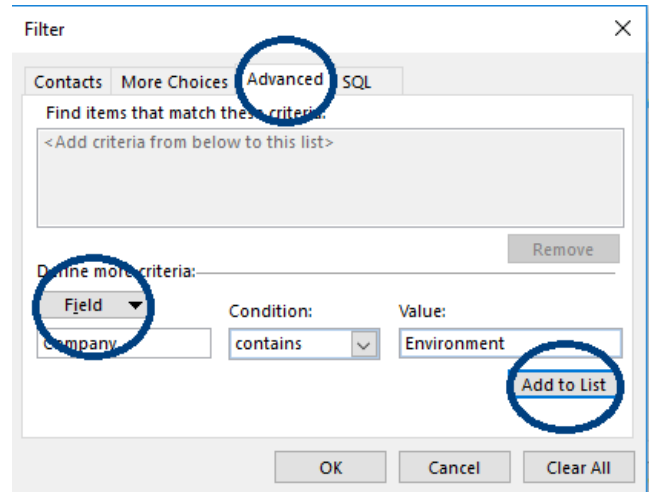
If there is a group of MEPs that you communicate with on a regular basis which cannot be categorized according to the pre-defined list of views, you may consider creating your own custom view which will then be easily accessible via the "Change View" drop down list on your tool bar.

As an example, we will describe creating a view that displays all "Environment, Public Health and Food Safety" Committee Members (Chair, Vice-Chairs, Political Group Coordinators, Full Members and Substitute Members).

1. On the Outlook menu: **View / Change View / Manage Views...**
2. Select a view you want to base your custom view on – in this case: "By Company"

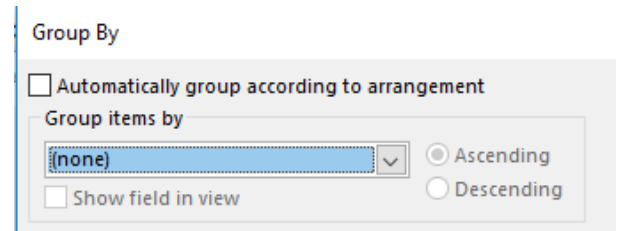
Manage All Views		
Views for folder "e-Contacts EP 2018.3...":		
View Name	Can Be Used On	
<Current view settings>	This folder (private)	Tab
By category	This folder (private)	Tab
People	All Contact folders	Car
Business Card	All Contact folders	Bus

3. Click the "Copy..." button on the right.
4. In the "Name of new view" field of the "Copy View" window, type "Environment Committee Members".
5. In the "Advanced View Settings" window, click on the "Filter" button.
6. In the "Filter" window, click on the "Advanced" tab.
7. Click on the "Field" drop-down menu, rest the cursor on "the "Frequently used fields" entry, and click on "Company". The "Condition" field is automatically set to "contains".
8. Type "Environment", in the "Value" field.
9. Click the "Add to list" button, and close the next two windows by pressing "OK" twice, which brings you back to the "Manage All Views" window.
10. Press the "Apply View" button.



The view you have now created displays only Members of the "Environment, Public Health and Food Safety Committee" Committee, but note that they are categorized according to the other Committees, Delegations and Other Bodies they work in. Although this may be helpful in some cases, you may want a list of the Environment Committee which is not further broken down. To achieve this, some more steps are required:

1. On the Outlook menu click on: **View / View Settings...**
2. Click on the "Group by..." button.
3. In the "Group items by..." drop-down list, select the top entry: "(none)"
4. Close all windows with "OK". This gives you an 'uncategorised' list of Committee Members.



6. Copying and exporting lists

Any Outlook list may be printed directly from Outlook, copied into a separate Outlook folder for re-use (e.g. as a distribution list for mailings by e-mail, fax, print, etc.), and/or copied to a separate application (e.g. Access, Excel, etc.).

Copying a list into an Excel sheet:

As an example, we will use the "Environment Committee Members" list to create a separate contacts folder.

1. Make sure the "Environment Committee Members" view is active in the **View / Change View** list box.
2. Scroll to the top of the list, and select the first entry.
3. Keeping the "Shift" key on your keyboard pressed, use the arrow keys on your keyboard to scroll to the last list entry. This will select all entries.
4. Press "Ctrl + C" to copy (or right click on the selected list and select "Copy").
5. Open a new sheet in Excel and make sure the first field (A1) is selected, and *Paste*.
6. A new table is created, with the field labels in the first row.

7. Group mailings

7.1. Creating mailings or printing labels in Word

To perform a mail merge:

1. Prepare the letter or label layout you would like to use for your mailing (the so-called "starting document"). Save and close the document.
2. In Outlook, select and mark the recipients you want to send the letter to.
3. Go to **Home / Mail Merge...**
4. Follow the instructions in the "Mail Merge Contacts" window and select the starting document.
5. The starting document will open automatically.
6. Now you can insert/modify the greeting line or the address block and finish the mail merge.

7.2. Group Faxes

Sending a group fax from Outlook to a selected set of recipients depends on the user's fax environment. All fax operations, such as setting up and managing recipient lists, including entries that contain more than one recipient, will work in exactly the same way as with any other Outlook Contacts data.

7.3. Group E-mails

An e-mail to a selected group of recipients is an extremely simple operation:

1. Configure a list view to show those MEPs to whom you wish to send an e-mail.
2. Select all. You may choose to select or de-select some by clicking on entries while keeping the "Ctrl" key on your keyboard presses.
3. On the Outlook menu, click **Home / E-mail**. A blank e-mail form with all of the recipients in the "To" field will appear. At this point, you may still add or delete recipients before sending the mail.