

e-Contacts EP instructions for Outlook 2007

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1. General

These instructions describe how to install and use **e-Contacts EP**. They are based on Microsoft Outlook 2007. 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 a "PST" file, 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.

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

- Check the Microsoft Office Outlook site:
<http://office.microsoft.com/en-us/outlook/FX100487751033.aspx>
- E-mail questions to: **econtactsep@eamonnbates.com**

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.

Although new versions of **e-Contacts EP** may co-exist with older ones, you may first want to delete old versions from Outlook and your hard disk. If you have entered your own data into the old Outlook file, this will also disappear. It will, therefore, be necessary to keep and transfer this information.

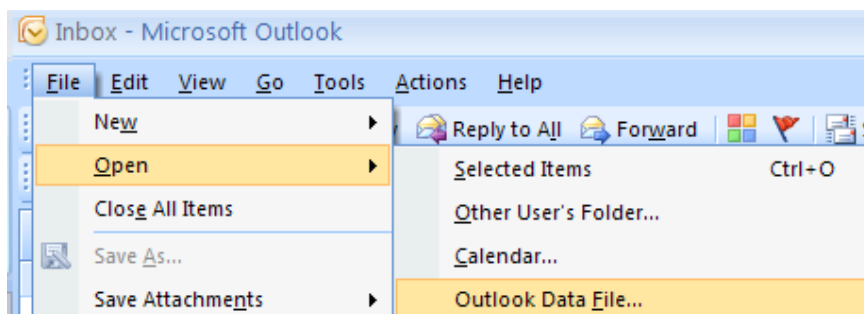
1. Make sure that **Folder List** is visible.
2. In the **Folder List**, right-click on "e-Contacts EP xxxx.x" and click on "Close "e-Contacts EP xxxx.x".
3. To delete the old **e-Contacts EP** file from your hard disk, make sure Outlook is closed and then delete the old version of **e-Contacts EP** 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 e-mail file attachment (e-Contacts EP xxxx.x) and save the zip file.
3. Extract the compressed file and save the .pst file in a location of your choice.
4. On the Outlook menu, select **File / Open / Outlook Data File...**



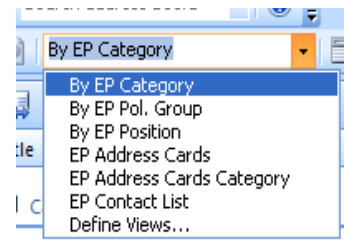
5. Navigate to the folder where you saved the .pst file, select and open it.
6. In the **Folder List**, find "e-Contacts EP xxxx.x" and click on the "+" to expand the view.
7. If you want to share **e-Contacts EP** as an MS Exchange Public Folder on the network copy it into your **All Public Folders**. 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 **e-Contacts EP**, such as viewing "By EP Category", which shows the MEPs by EP Committee or "By EP Pol. Group" which shows the MEPs by Political Group for example. 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. Make sure the "Current View" box (which you can see on the image to the right) is displayed in your Outlook Menu. If necessary, make the "Advanced Toolbar" visible (select **View / Toolbars / Advanced**).
2. Clicking on the list box arrow on the right will display the pre-defined views.
3. Clicking on an entry will activate that view.




In the following section, we will describe how to view assorted contacts, using the "Budgetary Control" Committee as an example.

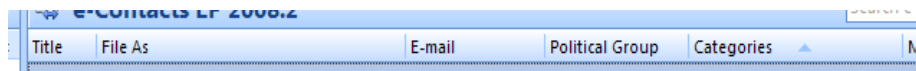
1. From the "Current View" list box, select "By EP Category". This will display a collapsed view of all EP Committees, Delegations, etc.
2. Clicking on the "+" next to "Budgetary Control" will display a list of its Members (Remember: In each Committee, there is a set of full members as in "Budgetary Committee", and a set of substitute members as in "Budgetary Control-S").

Title	File As	E-mail	Political Group	Categories	Member
Categories: BudgetaryControl (40 items, 40 unread)					
Mr.	Audy, Jean-Pierre	mailto:jean-pier...	PPE-DE	BudgetaryControl	France
Ms.	Ayala Sender, Inés	mailto:ines.ayal...	PSE	BudgetaryControl	Spain
Mr.	Bösch, Herbert	mailto:herbert.b...	PSE	BudgetaryControl	Austria
Mr.	Botopoulos, Costas	costas.botopoul...	PSE	BudgetaryControl	Greece

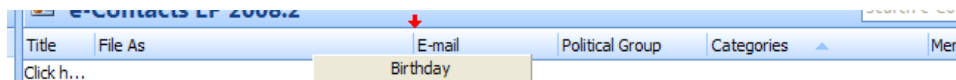
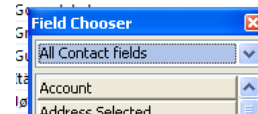
To display additional fields:

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

1. Click on the "Field Chooser" icon in the "Advanced Toolbar"  or 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 "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).

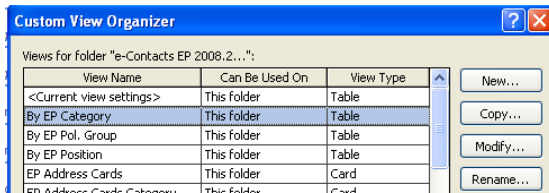


5. Creating custom views

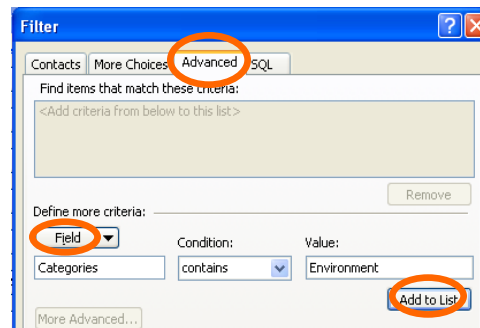
If there is a group of MEPs that you communicate with on a regular basis which cannot be categorised according to the pre-defined list of views, you may consider creating your own custom view which will then be easily accessible via the "Current View" drop down list on your tool bar.

As an example, we will describe creating a view that displays all Environment Committee Members (full and substitute).

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

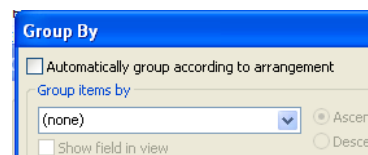


3. Click the "Copy..." button on the right.
4. In the "Name of new view" field of the "Copy View" window, type "Environment Committee Members".
5. In the "Customize View" window, click on the "Filter" button.
6. In the "Filter" window, click on the "Advanced" tab.
7. Click on the "Field" drop-down menu,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



The view you have now created displays only Members of the "Environment" Committee, but note that they are categorised according to the other Committees and Delegations 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 / Current View / Customize Current View...**
2. In the "Customize View" window, 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 a '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 "E-Contacts EP xxxx.x" folder.
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 to scroll to the last list entry. This will select all entries.
4. Press "Ctrl + C" to copy (or use the Menu: **Edit / 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 **Tools / 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 **Actions / Create / New Message to Contact**. 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.

8. e-Contacts EP fields

In order to make vital fields available for Mail Merge, we changed labels for some fields in Outlook. Below is a list of all fields and how these data fields will appear in Word Mail Merge.

E-Contacts EP	Outlook	Comment
Title	Title	
First Name	First Name	
Last Name	Last Name	
Party	Department	changed label
Member State	Home state	changed label
Group	Company	changed label
EP Position	Job Title	changed label
EP E-mail	E-mail Address	renamed
Brussels fields		
BRU Street	Business Street	renamed
BRU Street 2	Business Street 2	renamed
BRU Street 3	Business Street 3	renamed
BRU Postal Code	Business Postal Code	renamed
BRU City	Business City	renamed

BRU Country	Business Country	renamed
BRU Office Number	Office Location	changed label
BRU Phone	Business Phone	renamed
BRU Phone 2	Business Phone 2	renamed
BRU Fax	Business Fax	renamed
Strasbourg fields		
STR Street 1	Other Street	renamed
STR Street 2	Other Street 2	renamed
STR Street 3	Other Street 3	renamed
STR Postal Code	Other Postal Code	renamed
STR City	Other City	renamed
STR Country	Other Country	renamed
STR Office Number	Location	changed label
STR Phone	Other Phone	renamed
STR Phone 2	Callback	changed label
STR Fax	Other Fax	renamed
User data fields		
Language	Language 1	
Web Page	Web Page	
Categories fields		
Committee	Categories	changed label