“Getting Started with Outlook 2013 Client”
What you will learn:

- Access Outlook 2013 and Getting Started
- Viewing, Creating, and Sending Email
- Managing and Organizing your Email
- Utilizing “To-do” lists to manage and organize your tasks
- Your Next Steps?
- Accessing resources and support moving forward
Getting Started:

- Accessing Outlook
- Add your Signature (your current signature will not migrate from GroupWise)
- Add your photo (optional)
Accessing Outlook

Outlook 2013 Client Access:

1. Select MS Ribbon
2. Select All Programs
3. Select Microsoft Office 2013
4. Select Outlook 2013
Accessing Outlook (OWA)

1. www.myoffice.uwo.ca

2. Enter Western Email Address
   (jsmith6@uwo.ca)

3. Enter Western Password

4. Select Mail
1. Open Outlook 2013
2. Click File
3. Click Options
4. Click Mail
5. Click Signatures
6. Click the “New” button and enter a name for your signature
7. Copy/Paste or Enter your Signature into the box
8. Click OK
Add Your Signature (OWA)

1. Go to http://myoffice.uwo.ca and login, go to your Inbox
2. Click the Gear icon OWA Settings Gear in the top right
3. Under 'Your App settings' click 'Mail'
4. Under 'Mail' > 'Layout', click 'Email Signature'
5. Enter an email signature into the box.
6. Click 'Save'
Add Your Signature - Practice

Take 5 minutes to add your Signature either using Outlook or OWA using the template provided
Add Your Photo (OWA)

1. [www.myoffice.uwo.ca](http://www.myoffice.uwo.ca)
2. Enter Western Email Address (jsmith6@uwo.ca)
3. Enter Western Password
4. Select “Your Name” top right hand corner
5. Select View Account on right hand side of screen
6. Select Personal Info on the left hand tool bar
7. Select Upload/Change Photo
8. Select Browse and upload Photo
Viewing, Creating & Sending Email

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Viewing Email

1. Who the email is from.
2. Subject and date.
3. First sentence of the email.
4. Paperclip – email has an attachment.
5. Envelop with an arrow pointing left – you have replied to this email.
6. Red flag - email marked for follow-up.
7. Envelope with arrow pointing right - you have forwarded this email.
Viewing Email: Setting Viewing Preferences

1. Select “View” tab
2. Select Preferences for “Message Preview” viewing
3. Select Preferences for “Folder Pane” viewing
4. Select Preferences for “Reading Pane” viewing
5. Select Preferences for “To-do Bar” viewing
6. Select Preferences for “People Pane” viewing
Creating and Sending Email

Overview:

- Creating email
- “Ink feature”
- Email Options (including “Requesting a Delivery Receipt”)

In Outlook you must Request Receipt to Track Email when Sending!
Sending Email with Attachments or Hyperlinks

Overview:

- Including Attachments (files, emails, business cards, signatures, inserting hyperlinks, etc)

In Outlook Attachments must be Opened or Saved
Replying/Forwarding Email

Overview:
1. Reply
2. Reply All
3. Forwarded

In Outlook, Attachments originally included in an email will be removed when replying. To include an attachment in an email you've received, Forward the email to your recipient.
Saving and Reusing Email Content ("Quick Part")

1. After typing text into email, Select **Insert**
2. Select **Quick Parts**.
3. Save Selection to Quick Part Gallery.
4. In the **Create New Building Block** box, add **Name**, **Gallery**, **Category**, **Description**, & **Save**
Recalling/Replacing Email

1. Don’t Panic!
2. Open “Sent” message
3. Select Blue “File” Tab
4. Select “Message Resend and Recall” Box
5. Select “Recall” or “Resend” option

Outlook can retract email messages, but whether successful or not, the recipient knows that the attempt was made (and the attempt includes the subject line).
1. Select Blue “File” Tab
2. Select “Automatic Replies (Out of Office)
3. Select “Date/Time Range”
4. Insert Message(s) (Inside & Outside Org)

Vacation/Out of Office Alerts in GroupWise will NOT migrate into Outlook and will need to be re-created
Managing and Organizing your Email

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Setting Email Colour Coding
Flags, Reminders, & Overview:

1. Colour Coding
2. Flags
3. Reminders
Email Folders

Create a folder or subfolder:

1. Right-click Inbox and select New Folder
2. Type a name for the folder and press Enter.
Utilizing “To-do” lists to manage and organize your tasks

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Creating Tasks

1. Select Tasks.
3. In Subject, type the subject of the task.
4. Select a Start Date, Due Date, Status, Priority, or % Complete.
5. Select Reminder to set a reminder for the task.
6. Finish by selecting Save & Close.
Creating Tasks - Practice

Take 5 minutes to create (3) tasks in your calendar.
Assigning Tasks

1. Select Tasks
3. In Subject, type the subject of the task.
4. Select a Start Date, Due Date, Status, Priority, or % Complete.
5. Select Reminder to set a reminder for the task.
7. Select To… to add contacts from address book or type name or email address.
8. Add Notes to the task.
9. Select Send.
10. Select OK to confirm.

Outlook is unable to update a task sent to multiple recipients. A change or recall would have to be done for each individual recipient.
Assigning Tasks - Practice

Take 5 minutes to assign one of the tasks recently created in your calendar.
View Tasks & To-do Lists

My Tasks contains two folders:

1. **Tasks** - See all of your tasks.

2. **To-Do List** - See all the items which are flagged in your contact and emails.

In Outlook you cannot view future tasks. Clicking on a day in the future changes only the appointments, not the tasks. To see future tasks, you must look at the task list.
Your Next Steps?
Your Next Steps…

✓ Clean up and organize emails in GroupWise prior to migration as well as other tasks noted on the Migration Checklist

✓ Review the “What Items will be Migrated Checklist” and make note of permissions related to shared & assigned delegates that will have to be re-established in Outlook following migration

✓ Set aside 5-10 minutes a day to review Video Tutorials or User Guide for topics you still want to learn more about

✓ Save User Guide on your Desktop for easy access over the next few weeks
Your Next Steps…

- Register for “Utilizing the Advanced Functions of Outlook Workshop” if applicable to you

- Schedule time in your Calendar for Monday, June 5th if possible, to refigure rules, permissions, delegation, and other configurations required the first business day after migration
Support and Resources
Moving Forward
Outlook Training & Resources

Learn more about Outlook Client and how it can assist you in your role.

- Migration Checklist
- Quick Start Card
- Outlook 2013 Client User Guide

- Video Tutorials
- Workshop: Getting Started with Outlook 2013 Client
- Workshop: Utilizing the Advanced Features of Outlook 2013 Client