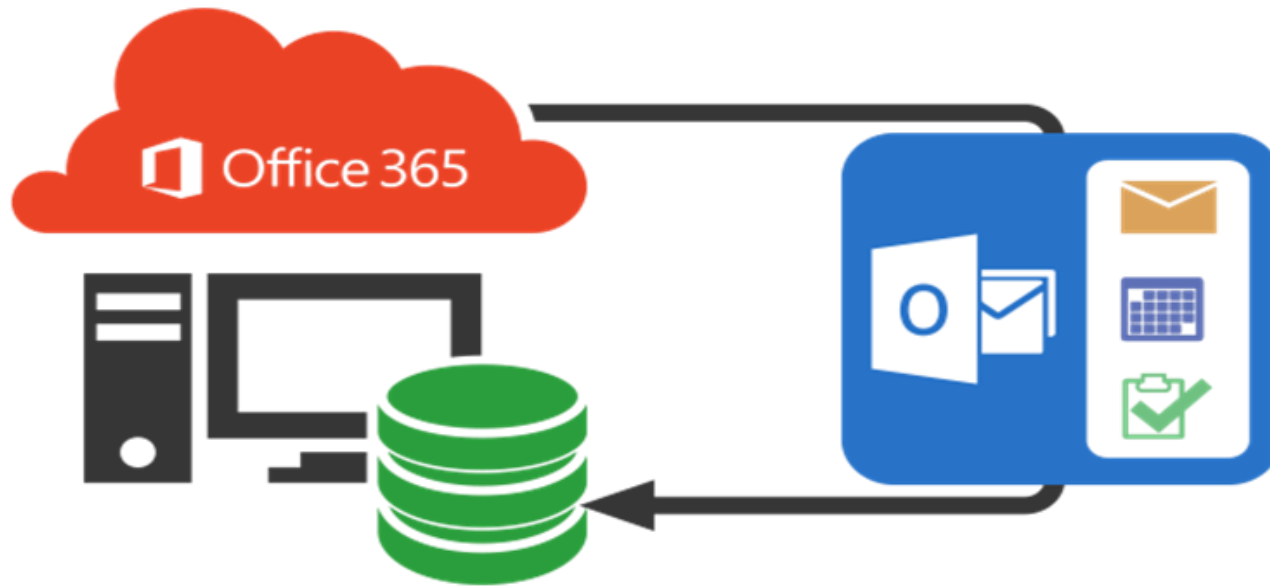




Schulich

MEDICINE & DENTISTRY

“Utilizing the Advanced Features of Outlook 2013 Client”



What you will learn:

- Managing and Organizing your Contacts
- Managing, Organizing, and Sharing Calendars
- Scheduling and Organizing Meetings
- Advanced Email functions
- Your Next Steps
- Accessing resources and support moving forward

Managing & Organizing Contacts

**Outlook Client 2013 User Guide
Pages 26 - 31**

Adding Contacts

2

5

3

4

Jennifer Bernardo - Contact

FILE CONTACT INSERT FORMAT TEXT REVIEW

Save & Close Delete Save & Forward OneNote

General Details Certificates All Fields Show

Email Meeting More Communicate

Address Book Check Names Names

Business Picture Card Options

Categorize Follow Up Tags

Update Zoom Start Inking

Update Zoom Ink

Full Name... Jennifer Bernardo

Company Schulich School of Medicine & Dentistry

Job title Instructional Trainer

File as Bernardo, Jennifer

Internet

E-mail... jennifer.bernardo@schulich.uwo.ca

Display as Jennifer Bernardo (jennifer.bernardo@schulich.uwo.ca)

Web page address www.schulich.uwo.ca

IM address

Phone numbers

Business... (519) 661-2111 x81415

Home...

Business Fax...

Mobile...

Addresses

Business... 1151 Richmond Street
Clinical Skills Building, Room 3720
London, ON N6A5C1

☒ This is the mailing address

Map It

Notes

Jennifer Bernardo
Schulich School of Medicine & Denti...
Instructional Trainer

(519) 661-2111 x81415 Work
jennifer.bernardo@schulich.uwo.ca
1151 Richmond Street
Clinical Skills Building, Room 3720
London, ON N6A5C1
www.schulich.uwo.ca

1. Select People.
2. Select New Contact
3. Enter in the details such as Full Name, Phone Numbers and E-mail.
4. Enter Notes about the contact.
5. Select Save & Close.

Organizing Contacts:

Categories

1 2 3

Full Name... Jennifer Bernardo

Company Schulich School of Medicine & Dentistry

Job title Instructional Trainer

File as Bernardo, Jennifer

Internet

E-mail... jennifer.bernardo@schulich.uwo.ca

Display as Jennifer Bernardo (jennifer.bernardo@schulich.uwo.ca)

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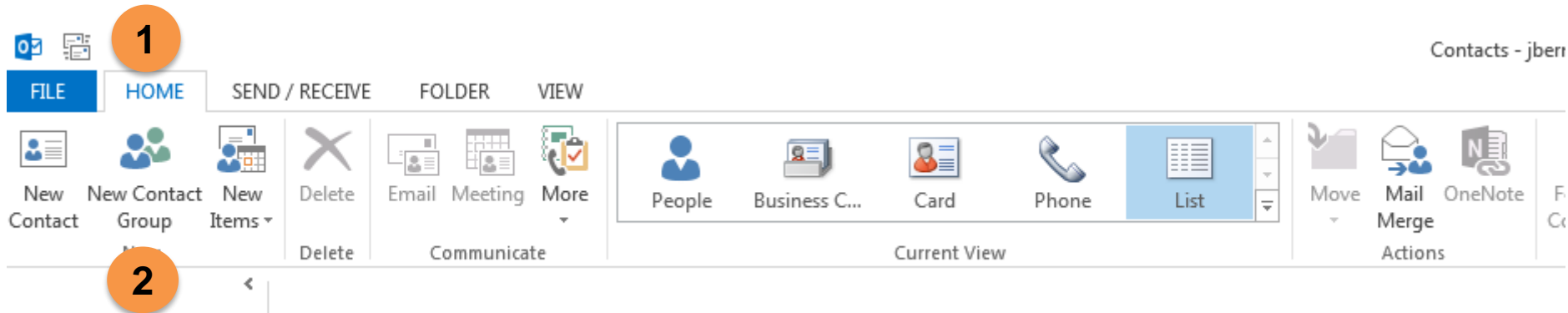
Notes

Jennifer Bernardo
Schulich School of Medicine & Dentistry
Instructional Trainer
(519) 661-2111 x81415 Work
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www.schulich.uwo.ca

- 1 Categorize by Colour
- 2 Mark for Follow-up
- 3 Mark as Private
4. Add Contact to Favourites

NOTE: Frequent Contacts will NOT migrate from GroupWise to Outlook

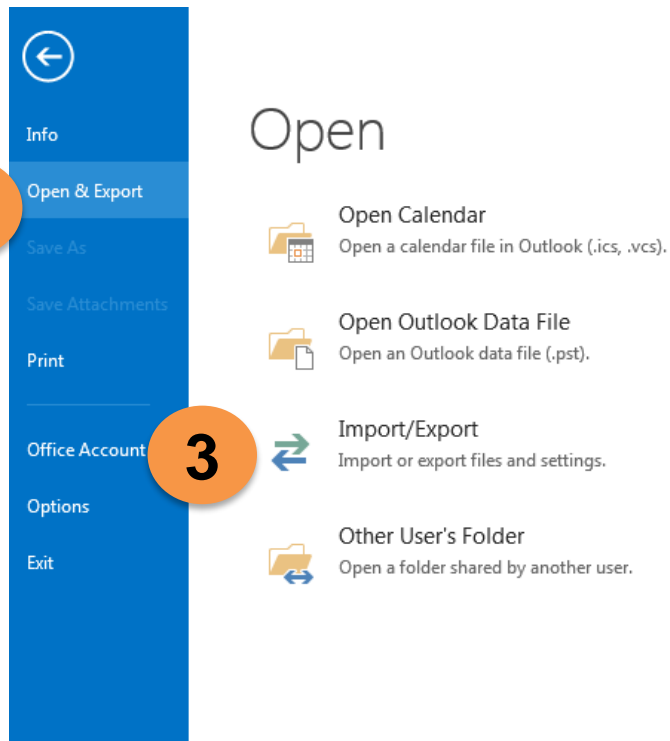
Organizing Contacts: Contact Groups/Lists (DL)



Create a contact group:

- 1 Select **Home > New Contact Group**.
- 2 In the **Contact Group** box, type the name for the group.
3. Select **Contact Group > Add Members**, and then select an option:
4. Select **From Outlook Contacts**.
5. Select **From Address Book**.
6. Select **New E-mail Contact**.
7. Add people from your address book or contacts list, and choose **OK**.
8. Choose **Save & Close**.

Importing & Exporting Contacts



1. **Select File**

2. **Select Open & Export**

3. **Select Import/Export**

Managing, Organizing & Sharing Calendars

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Pages 32 - 37

View Your Calendar:

The screenshot shows the Outlook calendar interface. At the top, five orange circles with numbers 1 through 5 are positioned above the view selection buttons. The buttons are: 1. Day, 2. Work Week, 3. Week, 4. Month, and 5. Schedule View. The 'Month' button is currently selected. Below the buttons, the calendar grid for May 2017 is displayed. The grid shows days of the week as columns and dates as rows. A blue box highlights the date '3' under 'WEDNESDAY'. To the right of the date '3', there is a blue box containing the text: '12:00pm Bersin by Deloitte Webinar The New Bersin by Deloitte Leadership Framework; Online Webinar;'. The interface also includes a search bar at the top right, a weather forecast for London, Canada, and a sidebar on the left showing a mini-calendar for May and June 2017.

Calendar - jbernar6@uwo.ca - Outlook

FILE HOME SEARCH

Change View View Settings Reset View

Current View

Day Work Week Week Month Schedule View

Arrangement

Time Scale

Overlay Working Hours

Color

Daily Task List

Folder Pane

Reading Pane

To-Do Bar

People Pane

Reminders Window

Open in New Window

Close All Items

London, Canada

Today 52° F / 39° F

Tomorrow 42° F / 40° F

Friday 45° F / 37° F

Search Calendar (Ctrl+E)

May 2017

SU MO TU WE TH FR

30 1 2 3 4 5

7 8 9 10 11 12

14 15 16 17 18 19

21 22 23 24 25 26

28 29 30 31

June 2017

SU MO TU WE TH FR

1 2

4 5 6 7 8 9

11 12 13 14 15 16

18 19 20 21 22 23

25 26 27 28 29 30

2 3 4 5 6 7

SUNDAY MONDAY TUESDAY WEDNESDAY THURSDAY FRIDAY SATURDAY

Apr 30 May 1 2 3 4 5 6

7 8 9 10 11 12 13

14 15 16 17 18 19 20

- 1 Day
- 2 Work Week
- 3 Week
- 4 Month
- 5 Schedule View (horizontal layout when multiple calendars viewed simultaneously)

Customize Your Calendar:

The screenshot shows the Outlook calendar interface for May 2017. The interface includes a ribbon with tabs for FILE, HOME, SEND / RECEIVE, FOLDER, and VIEW. The VIEW tab is active, showing options for Time Scale, Color, Daily Task List, Folder Pane, Reading Pane, To-Do Bar, People Pane, Reminders Window, Open in New Window, and Close All Items. The calendar view is set to 'Month' and 'Month' view is selected. The calendar shows dates from Sunday, April 30, to Saturday, May 6. A weather forecast for London, Canada is displayed at the top right, showing Today (52° F / 39° F), Tomorrow (42° F / 40° F), and Friday (45° F / 37° F). A search bar is located at the bottom right of the calendar view.

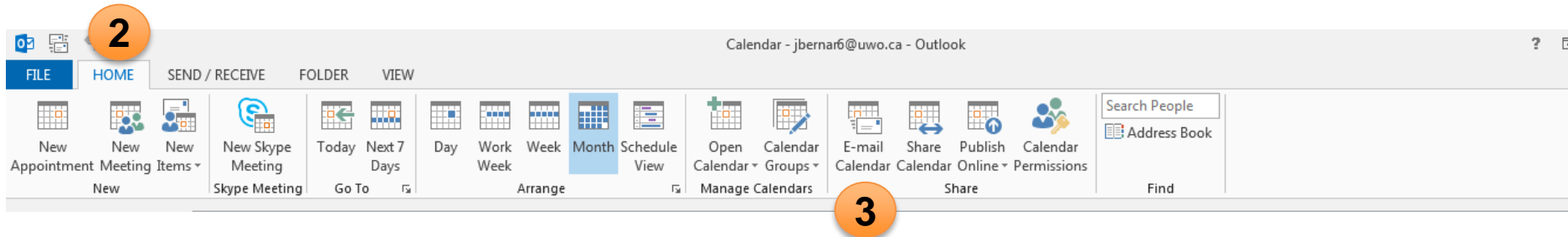
1 Time Scale/Zone

2 Colour

3 Daily Task List

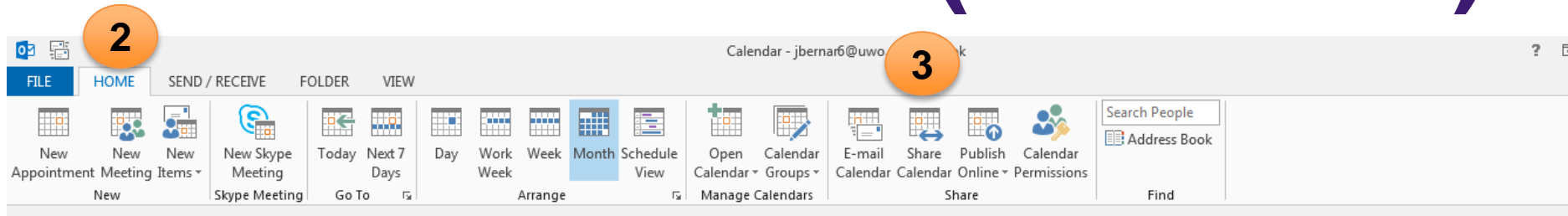
4 Weather Location

Email Your Calendar



1. Select **Calendar**.
2. Select **Home**
3. Select **E-mail Calendar**.
4. Select the **Calendar**, **Date Range**, and **Detail**.
5. Select **Advanced** to change the **E-mail Layout**, **Daily schedule**, and **List of events**.
6. Select **OK**. (**NOTE:** Your calendar entries populate in the email)
7. Address the email and select **Send**.

Share Calendar (= Access)

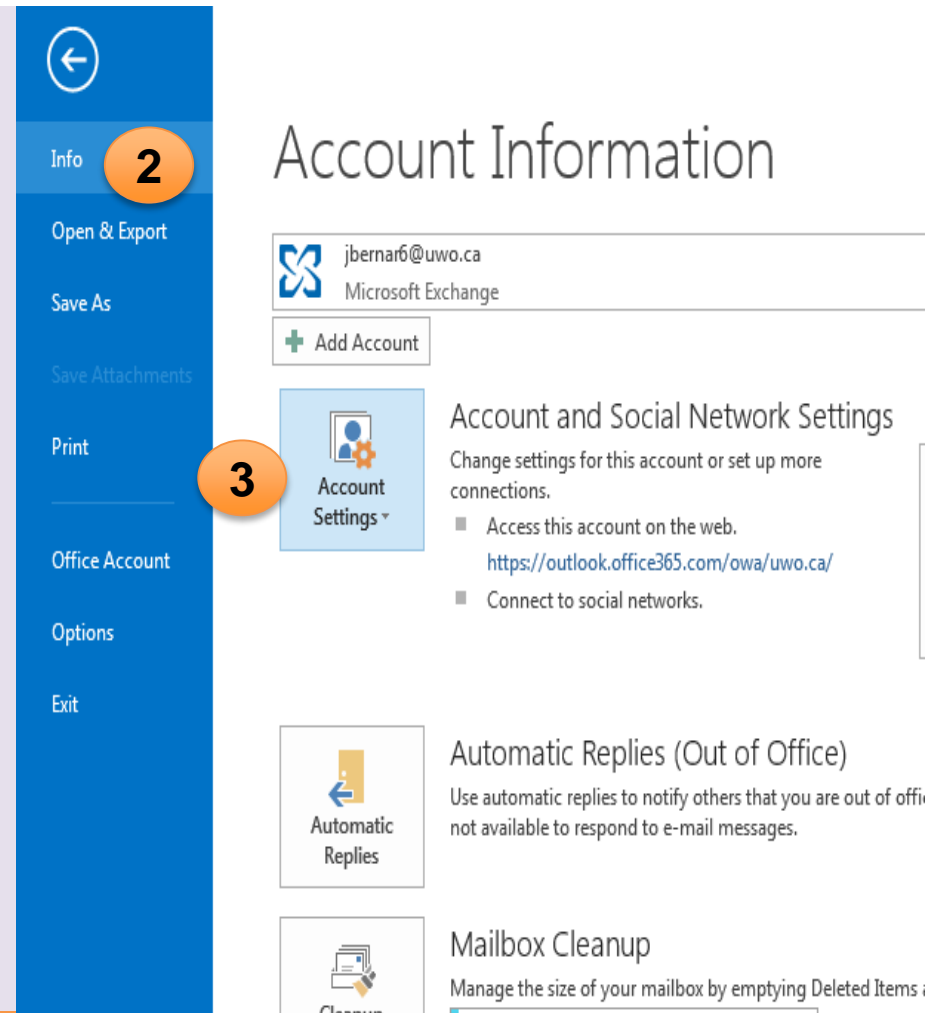


1. Select **Calendar**.
 2. Select **Home**
 3. Select **Share Calendar**.
 4. Select **Individuals**
 5. Select **Level of Details** to share
 6. Select **Check Box** if you would like to **Request to review Recipients Calendar**.
 7. Select **Send**
 8. Select **Yes** to Confirm sharing of Calendar before email sent
- NOTE:** If recipient agrees to share their calendar, you will receive an email message

Following Migration from GroupWise to Outlook, you will need to re-establish any permissions to “Share” Calendars

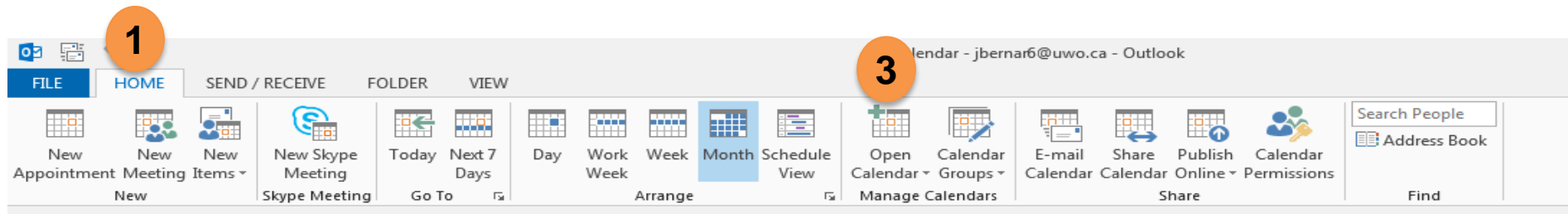
Delegate Calendar (= Manage)

1. Select **File**.
2. In **Info**,
3. select **Account Settings**.
4. Select **Delegate Access** from the drop-down list.
5. In the **Delegates** box, select **Add**.
6. Select a contact name from the **Address Book**.
7. Select **Add->**, and then select **OK**.
8. Select **Delegate Permissions**
9. Select the **Delegate receives copies** checkbox if you want this.
10. Select the **Automatically send a message to delegate**
11. Select **OK** to set the permission levels.
12. Select the **left arrow** to return to Outlook.



Following Migration from GroupWise to Outlook, you will need to re-assign "Delegates" (also known as "Proxy")

Opening/Viewing Multiple Calendars

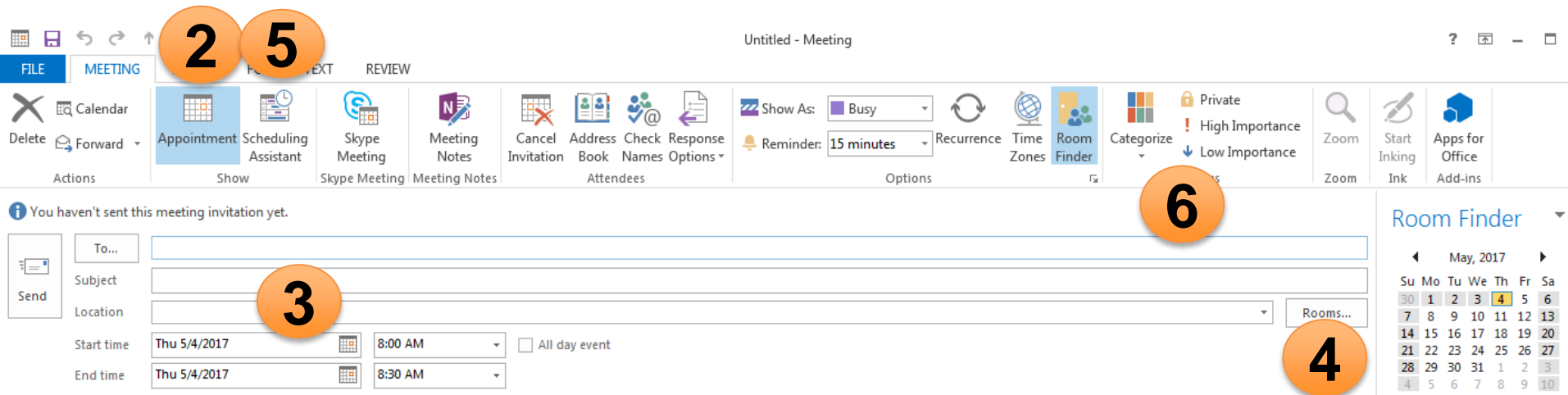


1. Select **Calendar**.
2. Select **Home**
3. Select **Open Calendar**
4. Select **From Address Book...**
5. Select a contact
6. Select **Calendar**
7. Select **OK**.

Scheduling & Organizing Meetings

**Outlook Client 2013 User Guide
Pages 38 - 40**

Schedule a Meeting



1. Select Home
2. Select New Appointment
3. Insert Subject, Location, and time
4. Book Room
5. Add Invitees (“To”, “Scheduling Assistant”)
6. Other Options: Colour Code, Private, Importance

In Outlook, **Recipients of Meetings Can Accidentally Move the Item without warning** (as only copies of meetings are sent).

Also, **Unaccepted Meetings** will migrate into Outlook, but will **show as “Accepted”**

Schedule Recurring Meetings

Untitled - Meeting

1

FILE MEETING INSERT FORMAT TEXT REVIEW

Delete Calendar Appointment Scheduling Assistant Skype Meeting Meeting Notes Cancel Invitation Address Book Check Names Response Options

Actions Show Skype Meeting Meeting Notes Attendees

Show As: Busy Recurrence Time Zones Room Finder Categorize Private High Importance Low Importance Tags Zoom Start Inking Apps for Office Add-ins

You haven't sent this meeting invitation yet.

To... Subject Location Start time Thu 5/4/2017 8:00 AM End time Thu 5/4/2017 8:30 AM

Rooms...

Room Finder

May, 2017

Su	Mo	Tu	We	Th	Fr	Sa
30	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3
4	5	6	7	8	9	10

Good Fair Poor

Show a room list:

None

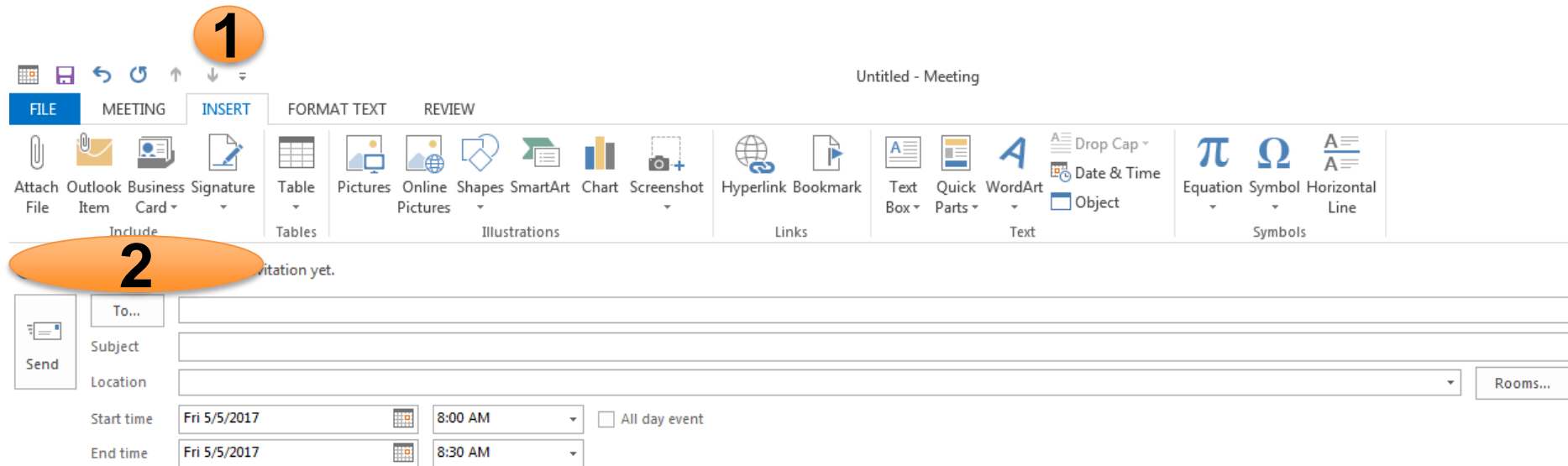
Choose an available room:

- 1 Select Recurrence
2. Select Appointment Times
3. Select Recurrence Pattern
4. Select Range Of Recurrence
5. Select OK

Recurring Meetings **will migrate as separate appointments** into your Outlook Calendar

In Outlook, if you **delete a recurring meeting, it is not recoverable**

Including Attachments with Meeting Invitations



- 1 Select Insert
- 2 Attach File, Outlook Item, Business Card, Signature
3. Select OK

When an **Outlook item is attached**, it includes all info you have saved for that item (including personal notes).

Advanced Email Functions

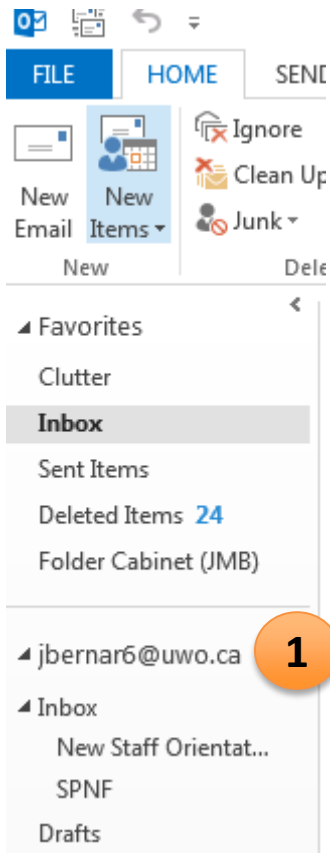
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Sharing Email Folders

Providing someone permission to access a folder in your Office 365 account it involves **giving permission in two places.**

1. Permission to access your Office 365 e-mail account Mailbox (e.g., schulich@uwo.ca)
2. Permission to access each Folder/Subfolder you want to share.
3. Once an individual has been given permission they must follow steps to Access the Email folders

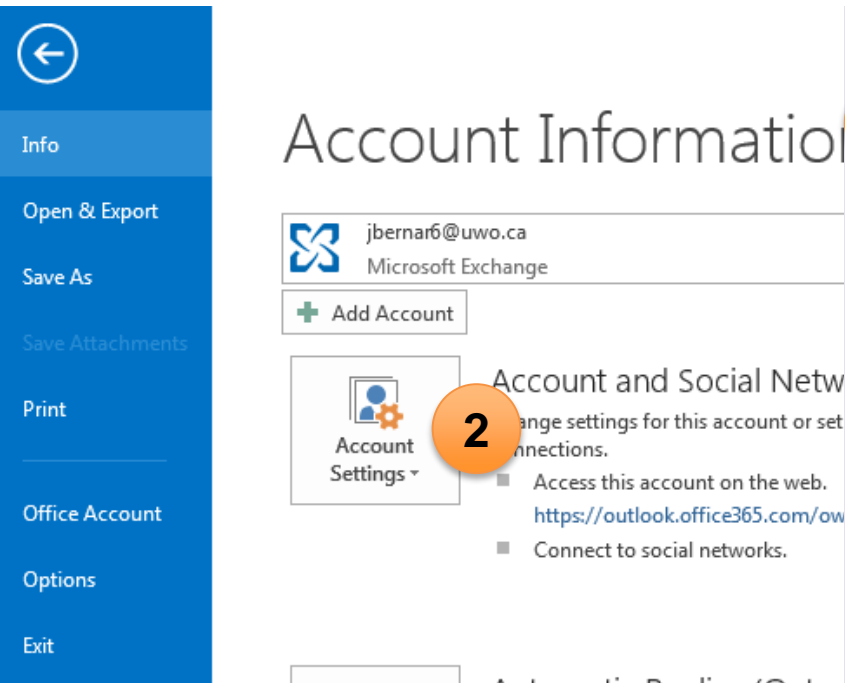
Providing Permission



1. Right-click on your Mailbox
2. Select **Folder Permissions**.
3. Select the **Permissions** tab.
4. Select the **Add** button.
5. Select the person you wish to give permission
6. Select **Add** button.
7. Press the **OK** button.
8. Click on the person's name & appropriate permissions from (Reviewer rights are recommended at the Mailbox level)
9. Select the option "**Folder Visible**".
10. Click the **OK** button.

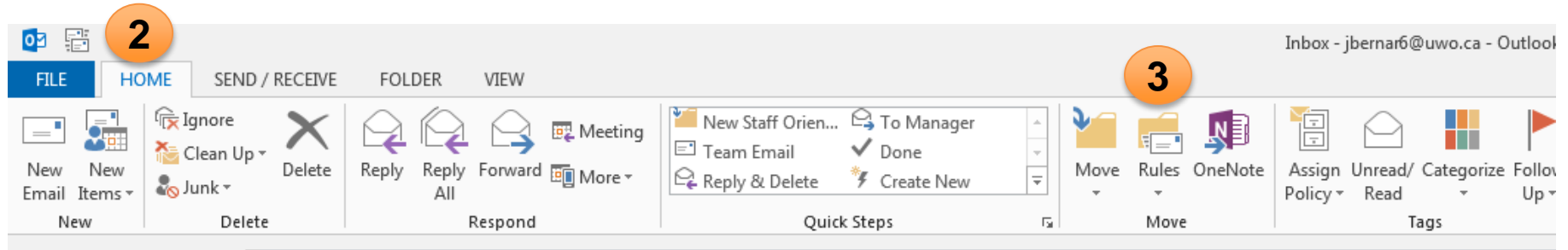
To share additional folders/subfolders, right-click on the folder or subfolder, click on **Properties** and then click on the **Permissions tab** of the folder you wish to share, and follow steps 2-7 above.

Accessing Email Folders



1. Choose **File**
2. Select **Account Settings**.
3. Select your **Office 365 account** and click the **Change** button.
4. Click the **More Settings** button.
5. Click the **Advanced** button.
6. Under Mailboxes, 'Open these additional mailboxes:' click on the Add button and type the person's name providing permissions, and click **OK**
7. Click the **OK** button.
8. Click the **Next** button.
9. Click the **Finish** button.
10. **Restart Outlook.**

Manage Email Messages with “Rules”



1. Select the email message for which you want to create a rule.
2. Select **Home**
3. Select **Rules**.
4. Suggested rules appear,
5. Select an option:
6. Select a destination folder, and then select OK.

Following Migration from GroupWise, you will need to re-create “Rules” in Outlook

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
- ✓ **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

[GET HELP ▼](#)[ONLINE FORMS ▼](#)[SERVICES ▼](#)[RESOURCES ▼](#)[ABOUT US ▼](#)[Home](#) > [Resources](#) > [Office 365](#) > [Outlook Training Resources](#)

Resources

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Migration Project](#)[Outlook Training Resources](#)[Video Tutorials](#)[Phishing](#)

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](#)



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