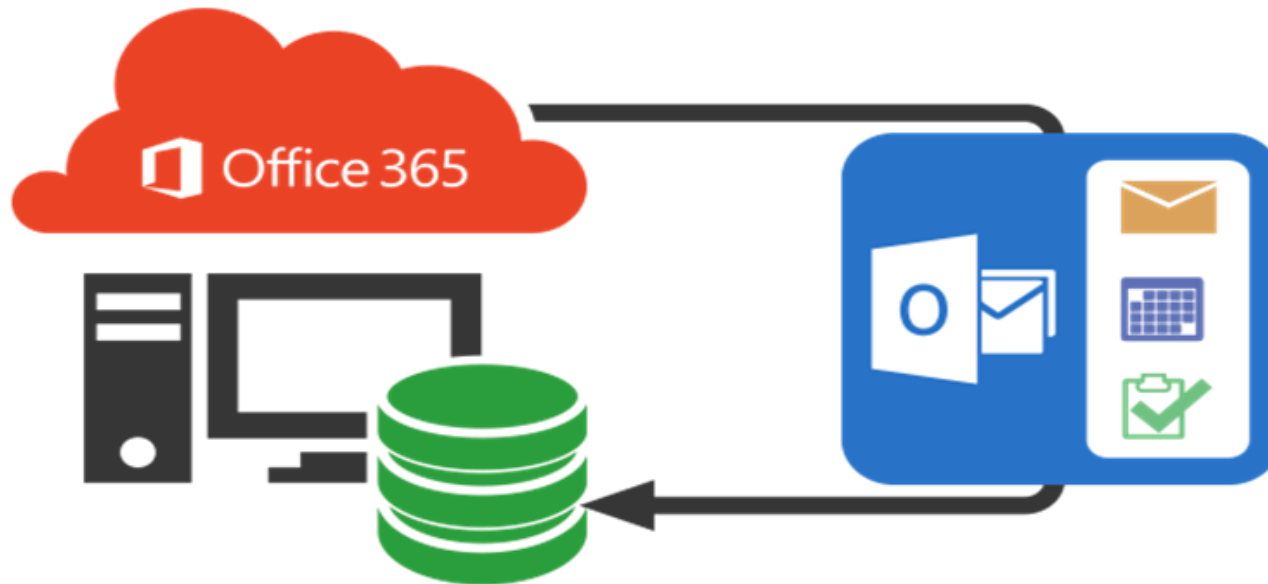




Schulich

MEDICINE & DENTISTRY

“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


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Pages 6 - 8**

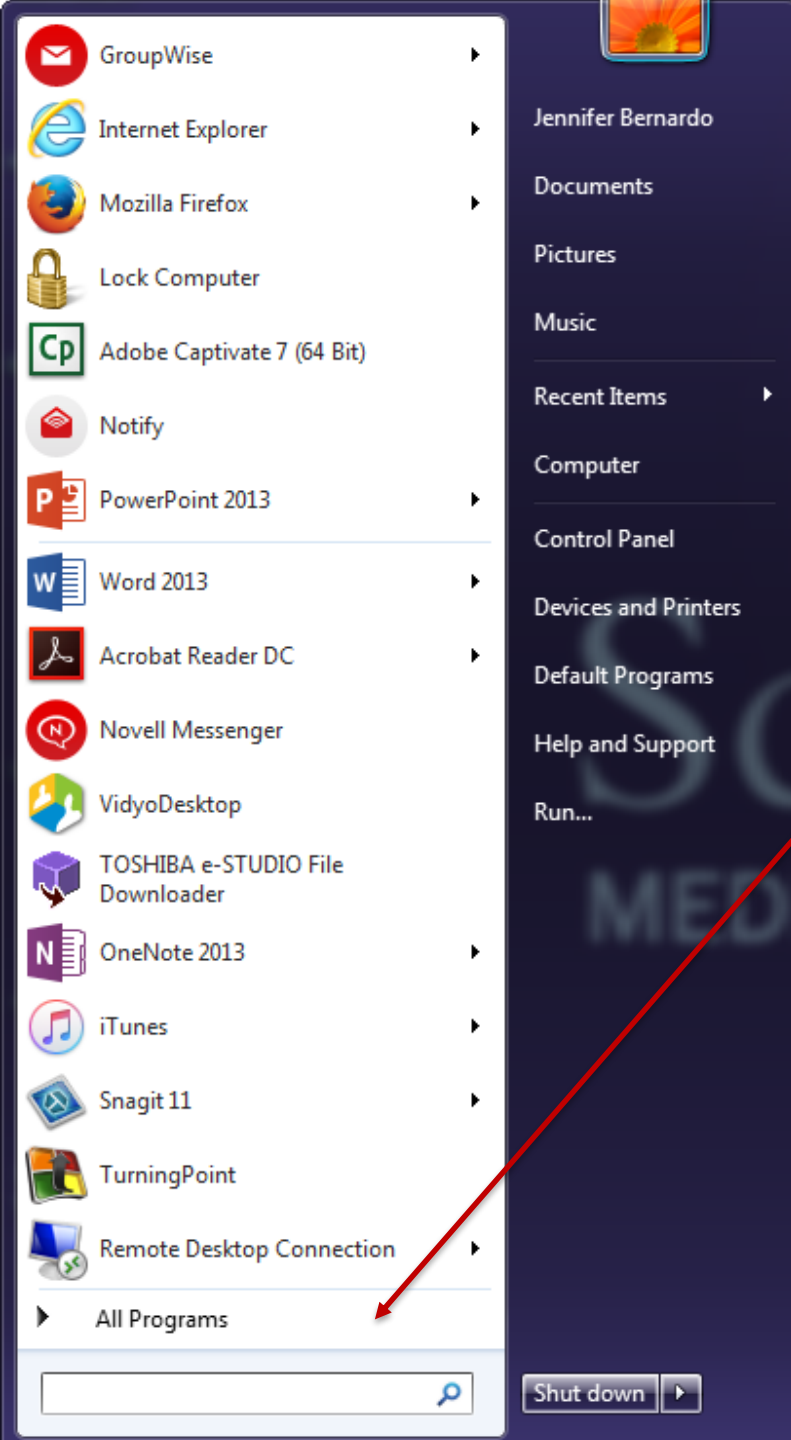
Getting Started:

- 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)



Sign in with your organizational account

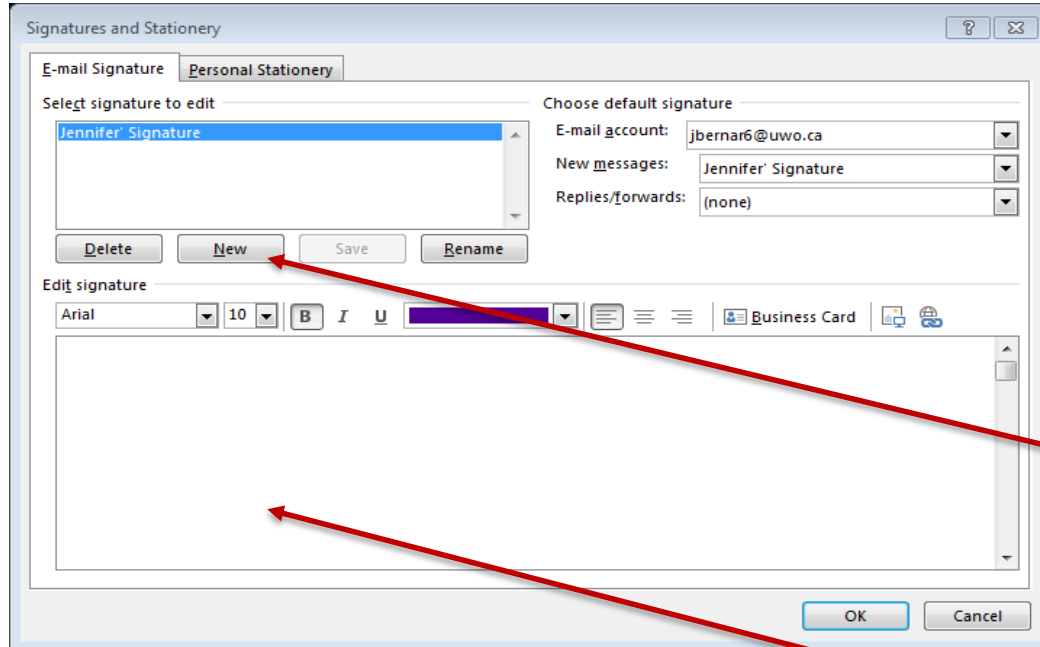
[Sign in](#)

Sign in with userID@uwo.ca
For help please visit the [Western Office 365 Help Page](#)

© 2013 Microsoft Help

1. www.myoffice.uwo.ca
2. Enter Western Email Address
(jsmith6@uwo.ca)
3. Enter Western Password
4. Select Mail

Add Your Signature



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)

Options

- Shortcuts
- General
- Mail
 - Automatic processing
 - Automatic replies
 - Clutter
 - Undo send
 - Inbox and sweep rules
 - Junk email reporting
 - Mark as read
 - Message options
 - Read receipts
 - Reply settings
 - Retention policies
 - Accounts
 - Block or allow
 - Connected accounts
 - Forwarding
 - POP and IMAP
 - Attachment options
 - Storage accounts
 - Layout
 - Conversations
 - Email signature
 - Focused inbox
 - Link preview
 - Message format
 - Message list
 - Quick actions
 - Reading pane
 - S/MIME
 - Calendar
 - People

Save Discard

Email signature

☒ Automatically include my signature on new messages I compose

☐ Automatically include my signature on messages I forward or reply to

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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'

Settings

Search all settings

Automatic replies

Create an automatic reply (Out of office) message.

Display settings

Choose how your Inbox should be organized.

Manage integrations

Connect Outlook to your favorite apps and services.

Theme

Default theme

Notifications

On

Your app settings

Office 365

Mail

Calendar

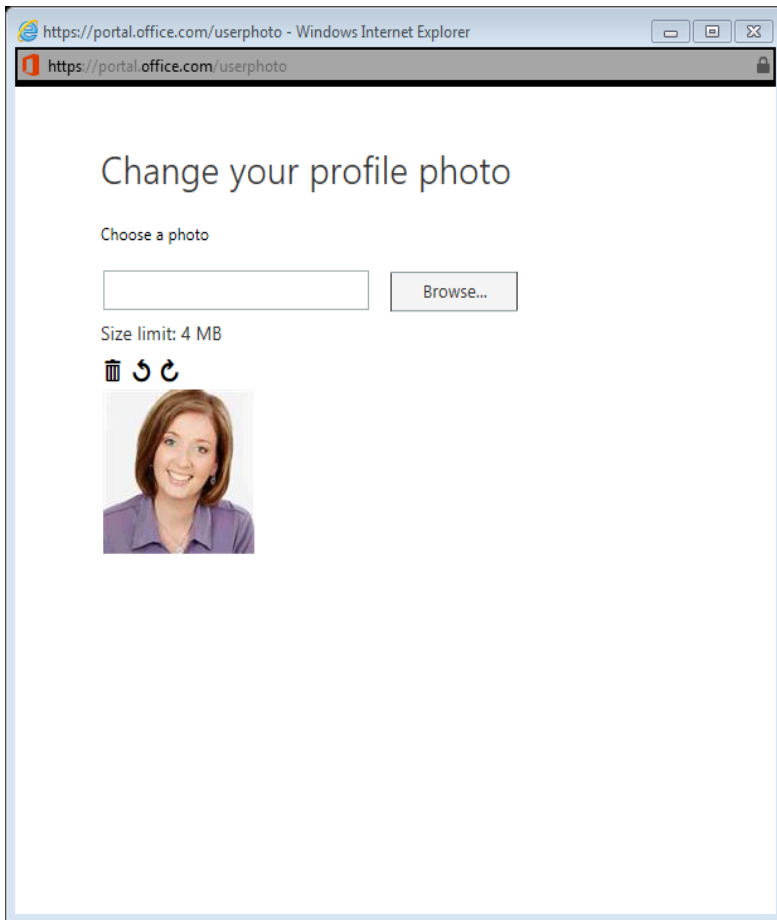
People

Yammer

Add Your Signature - Practice

Take 5 minutes to add your Signature either using Outlook or OWA using the template provided

Add Your Photo (OWA)

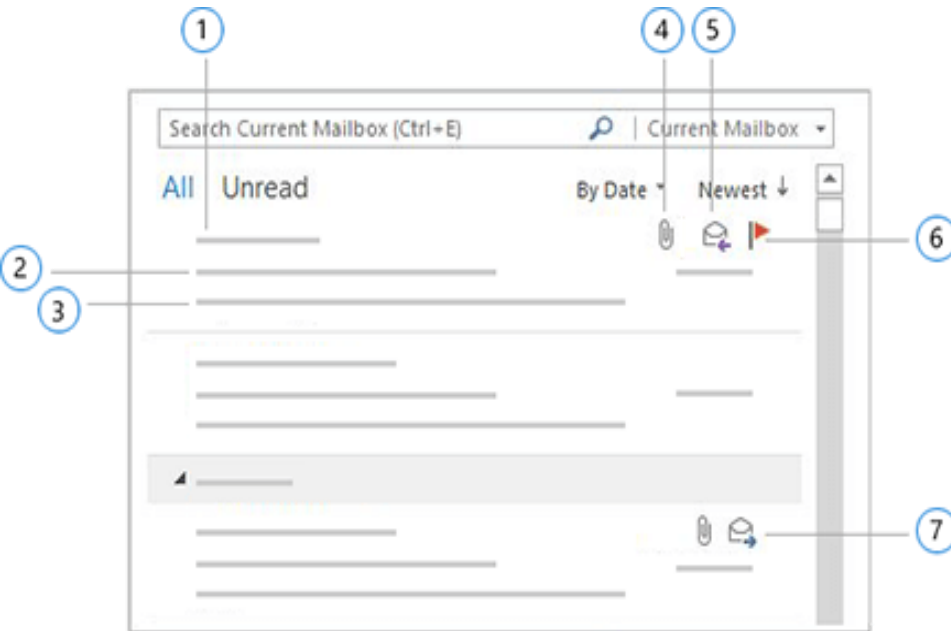


1. www.myoffice.uwo.ca
2. Enter Western Email Address (jsmith6@uwo.ca)
3. Enter Western Password
4. Select “Your Name” top right hand corner
5. Select **View Account** on right hand side of screen
6. Select **Personal Info** on the left hand tool bar
7. Select **Upload/Change Photo**
8. Select Browse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

Viewing, Creating & Sending Email

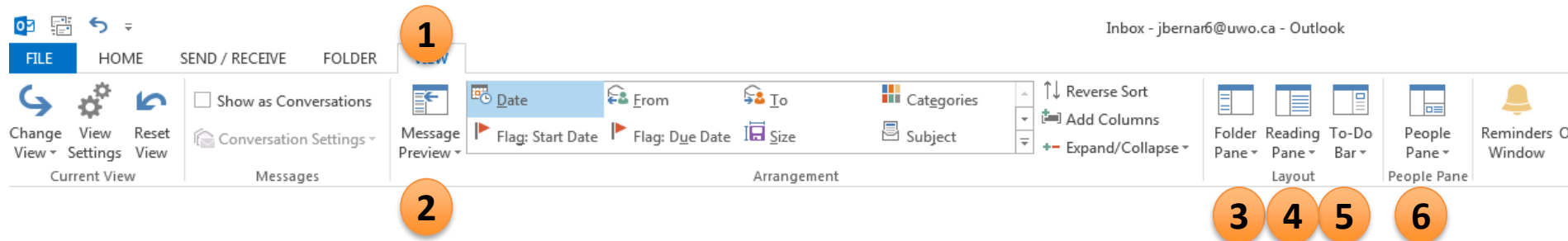
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Viewing Email



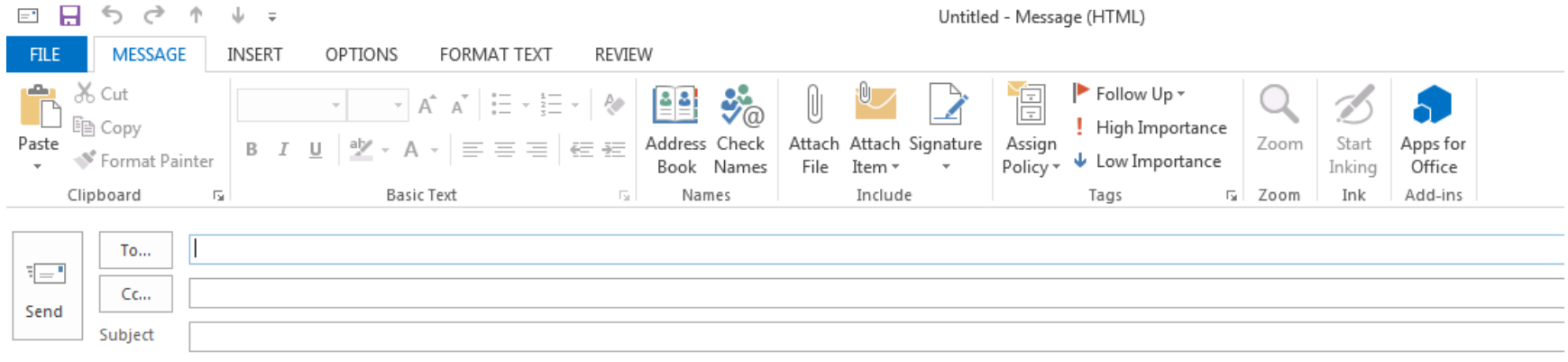
1. Who the email is from.
2. Subject and date.
3. First sentence of the email.
4. **Paperclip** – email has an attachment.
5. Envelop with an **arrow pointing left** – you have replied to this email
6. **Red flag** - email marked for follow-up.
7. Envelope with **arrow pointing right** - you have forwarded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

Viewing Email: Setting Viewing Preferences



- 1 Select “**View**” tab
- 2 Select Preferences for “**Message Preview**”
- 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

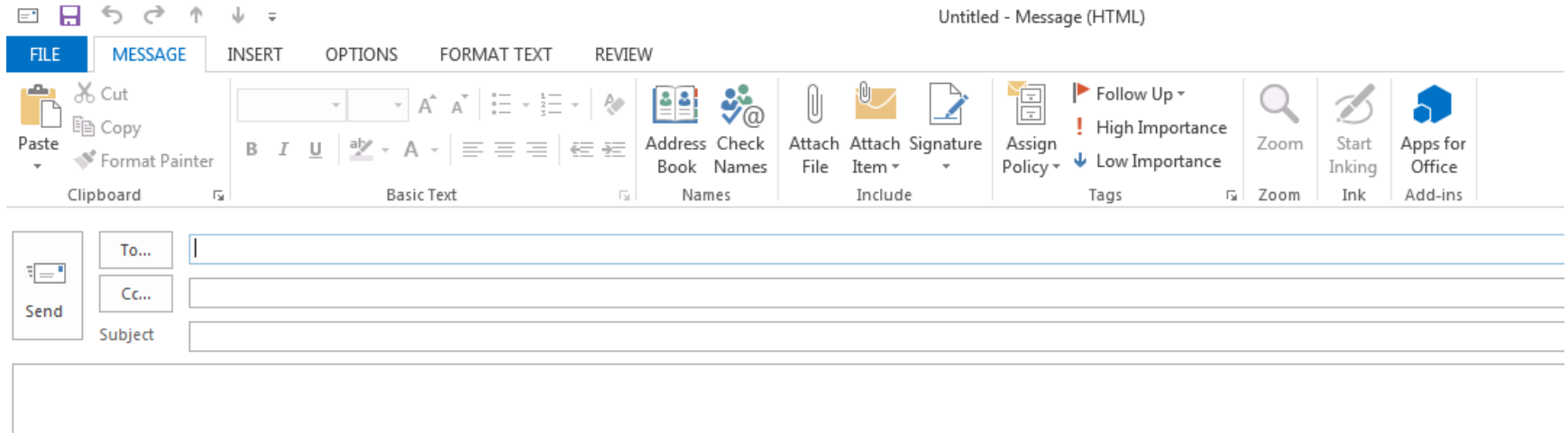


Overview:

- ☐ 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

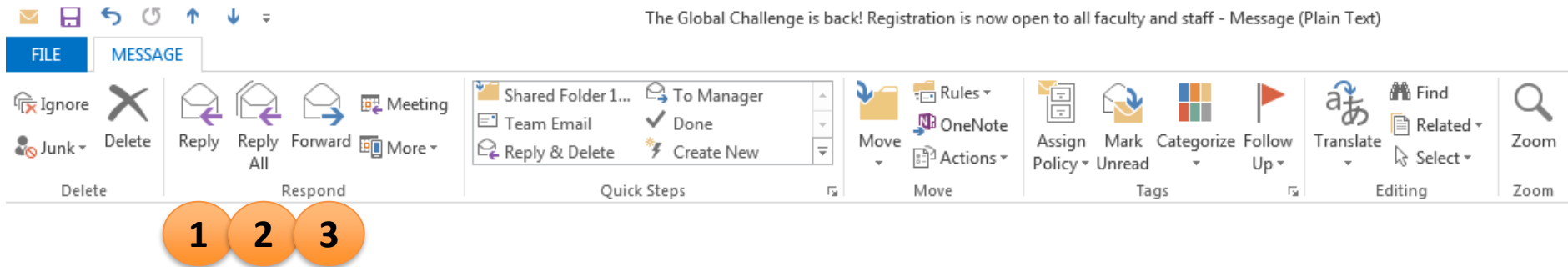


Overview:

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

**In Outlook
Attachments
must be
Opened or
Saved**

Replying/Forwarding Email

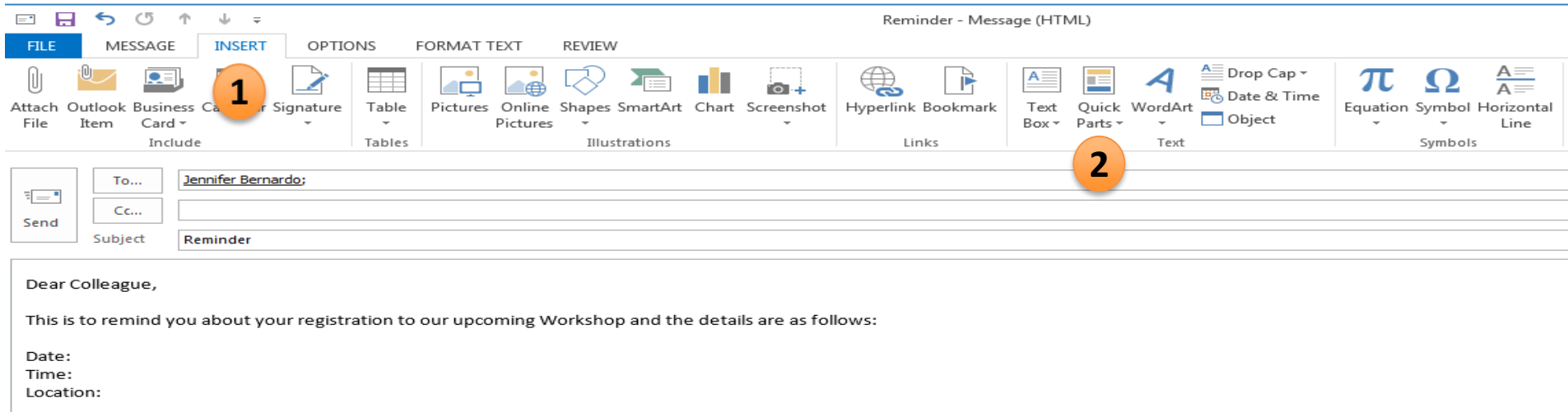


Overview:

- 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).

test - Message (HTML)

test

Info

Save

Save As

Save Attachments

Print

Close

Office Account

Options

Restrict permissions to this item

Set up restrictions for this item. For example, you may be able to restrict recipients from forwarding the e-mail message to other people.

Move item to a different folder

Move or copy this item to a different folder.

■ Current Folder: Sent Items

Message Delivery Report

Review delivery report for this e-mail message, including the date and time the message was delivered to the recipients.

Message Resend and Recall

Resend this e-mail message or attempt to recall it from recipients.

Properties

Set and view advanced options and properties for this item.

■ Size: 7 KB

4

Vacation/Out of Office Alerts

1. Select Blue “File” Tab
2. Select “Automatic Replies (Out of Office)”
3. Select “Date/Time Range”
4. Insert Message(s) (Inside & Outside Org)

The screenshot displays the Outlook 'Account Information' page. On the left, a blue sidebar contains the 'File' tab menu with options: Info, Open & Export, Save As, Save Attachments, Print, Office Account, Options, and Exit. The main content area is titled 'Account Information' and shows settings for the account 'jbernar6@uwo.ca' (Microsoft Exchange). A red circle with the number 2 highlights the 'Automatic Replies (Out of Office)' section. Other sections visible include 'Account and Social Network Settings', 'Mailbox Cleanup', 'Rules and Alerts', and 'Manage Add-ins'.

Account Information

jbernar6@uwo.ca
Microsoft Exchange

+ Add Account

Account Settings

Account and Social Network Settings
Change settings for this account or set up more connections.

- Access this account on the web.
<https://outlook.office365.com/owa/uwo.ca/>
- Connect to social networks.

Automatic Replies (Out of Office)
Use automatic replies to notify others that you are out of office, on vacation, not available to respond to e-mail messages.

Mailbox Cleanup
Manage the size of your mailbox by emptying Deleted Items and archiving.

49.4 GB free of 49.5 GB

Rules and Alerts
Use Rules and Alerts to help organize your incoming e-mail messages, and receive updates when items are added, changed, or removed.

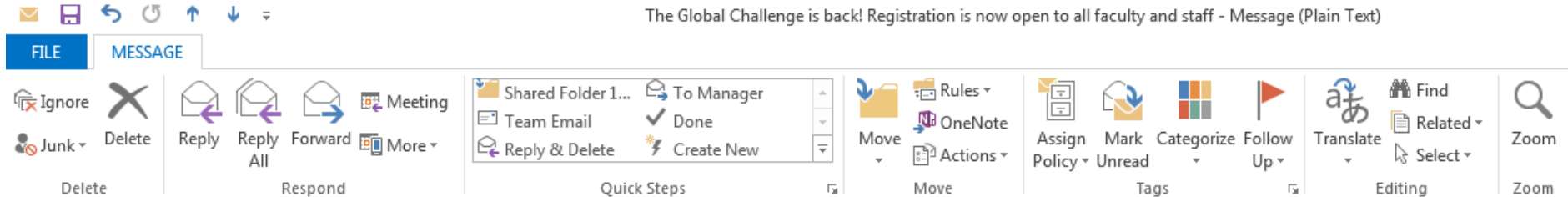
Manage Add-ins
Manage and acquire Web Add-ins for Outlook.

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, &



1

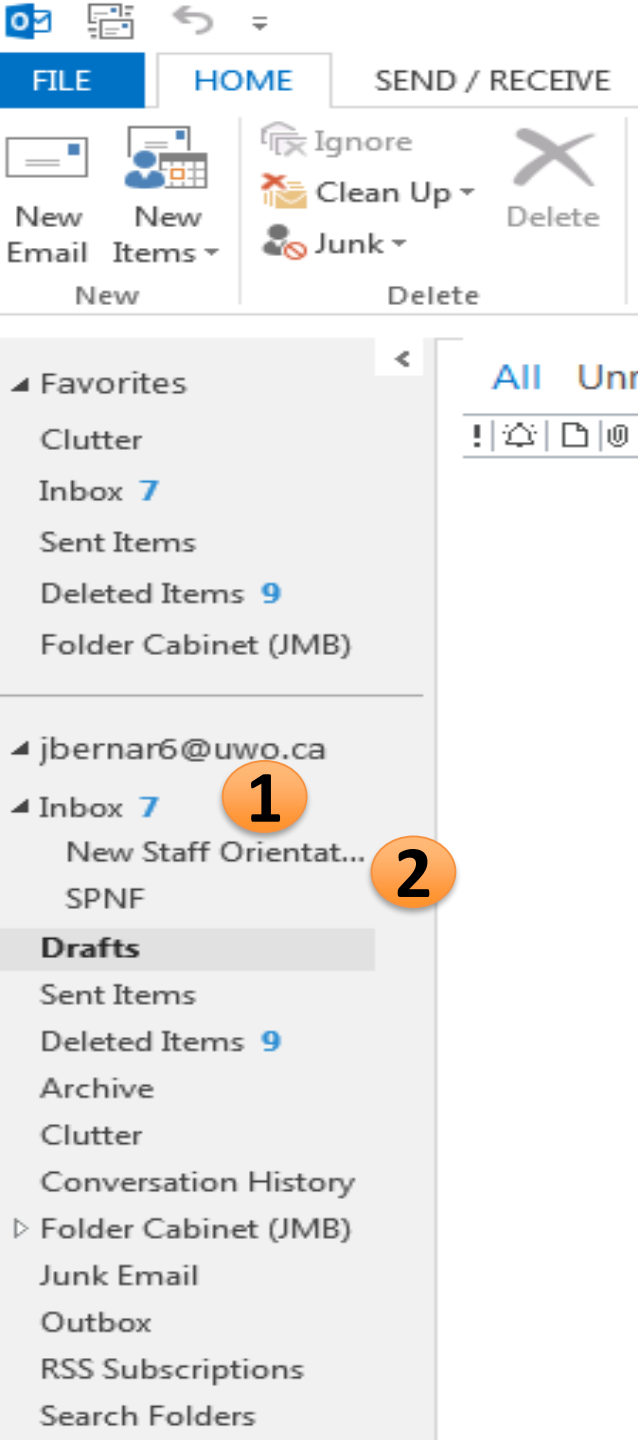
2

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

**Outlook Client 2013 User Guide
Pages 23 - 25**

Creating Tasks

The screenshot displays the Microsoft To Do application interface. At the top is a ribbon with tabs: FILE, TASK, INSERT, FORMAT TEXT, and REVIEW. The TASK tab is active, showing a group of icons for 'Actions' (Save & Close, Delete, Forward, OneNote), 'Show' (Task, Details), 'Manage Task' (Mark Complete, Assign Task, Send Status Report), 'Recurrence' (Recurrence), 'Tags' (Categorize, Follow Up, Private, High Importance, Low Importance), 'Zoom' (Zoom), and 'Start Inking' (Start Inking). Below the ribbon is the task creation form. It includes a 'Subject' field (callout 3), 'Start date' and 'Due date' fields (both set to 'None', callout 4), a 'Status' dropdown (set to 'Not Started', callout 4), a 'Priority' dropdown (set to 'Normal', callout 4), a '% Complete' field (set to '0%', callout 4), a 'Reminder' checkbox (callout 5), and an 'Owner' field (set to 'Jennifer Bernardo', callout 4). The 'Save & Close' button is highlighted with a callout 6.

1. Select Tasks.
2. Select New Task.
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

The screenshot shows the 'Assign Task' dialog box in Microsoft Outlook. The 'TASK' tab is selected in the ribbon. Callout 3 points to the 'Subject' field. Callout 4 points to the 'Status' dropdown menu, which is currently set to 'Not Started'. Callout 5 points to the 'Reminders' checkbox, which is currently unchecked. Callout 6 points to the 'Assign Task' button in the 'Manage Task' group.

Subject **3**

Start date Status **4**

Due date Priority % Complete

☐ Reminders **5** Owner Jennifer Bernardo

6

1. Select Tasks
2. Select New Task.
- 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** Select Assign 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

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Resources

[System Health Status](#)[Software Downloads](#)[Equipment Loans](#)[Room Technology](#)[Conferencing](#)[Qualtrics](#)[Livestream Information](#)[Office 365](#)[O365 Resources](#)[Status of Groupwise
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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