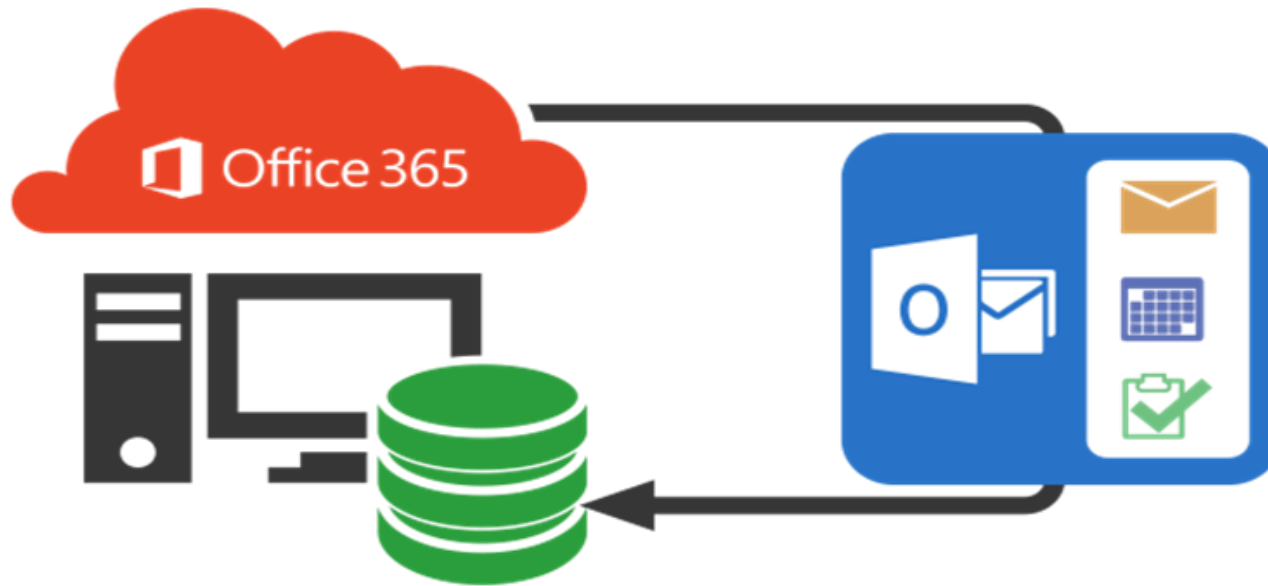




Schulich

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

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Adding Contacts

The screenshot shows the Microsoft Outlook interface for a contact named Jennifer Bernardo. The window title is "Jennifer Bernardo - Contact". The ribbon includes FILE, CONTACT, INSERT, FORMAT TEXT, and REVIEW. The CONTACT ribbon is active, showing options like Save & Close, Delete, Forward, OneNote, General, Certificates, All Fields, Communicate, Names, Options, Tags, Private, Update, Zoom, and Ink. The contact details are as follows:

- 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
- 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

Numbered callouts indicate the following steps:

- 2: Save & Close button
- 5: Save & Forward button
- 3: Business phone number field
- 4: Notes field

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

The screenshot shows the Outlook contact details for Jennifer Bernardo. Three orange circles with numbers 1, 2, and 3 are overlaid on the ribbon to indicate the steps:

- 1** Categorize by Colour: The 'Categorize' button in the ribbon is highlighted.
- 2** Mark for Follow-up: The 'Follow Up' button in the ribbon is highlighted.
- 3** Mark as Private: The 'Private' button in the ribbon is highlighted.

The contact details form includes the following information:

- 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
- Phone numbers:**
 - Business:** (519) 661-2111 x81415
- Addresses:**
 - Business:** 1151 Richmond Street, Clinical Skills Building, Room 3720, London, ON N6A5C1

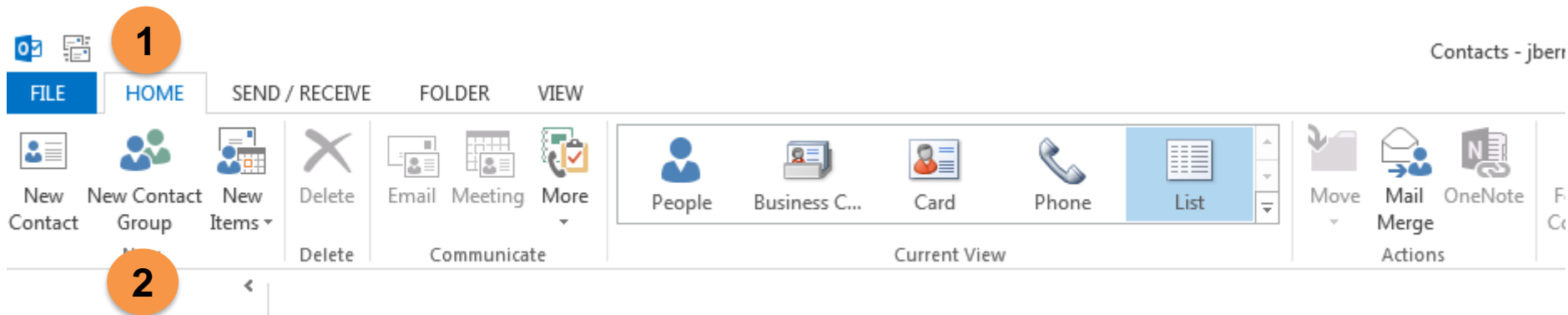
The contact card on the right displays the name, title, and contact information:

Jennifer Bernardo
Schulich School of Medicine & Dentistry
Instructional Trainer
[\(519\) 661-2111 x81415](tel:5196612111x81415) Work
jennifer.bernardo@schulich.uwo.ca
1151 Richmond Street
Clinical Skills Building, Room 3720
London, ON N6A5C1
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

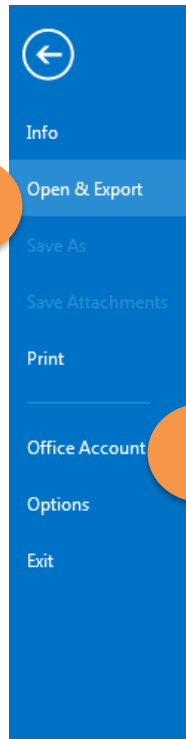
Organizing Contacts: Contact Groups/Lists (DL)







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



Open

-  **Open Calendar**
Open a calendar file in Outlook (.ics, .vcs).
-  **Open Outlook Data File**
Open an Outlook data file (.pst).
-  **Import/Export**
Import or export files and settings.
-  **Other User's Folder**
Open a folder shared by another user.

3

1. **Select File**

2 **Select Open & Export**

3 **Select Import/Export**

Managing, Organizing & Sharing Calendars

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View Your Calendar:

The screenshot shows the Outlook calendar interface. At the top, there are five orange circles numbered 1 through 5, corresponding to the view options in the ribbon. The ribbon includes 'Change View', 'View Settings', and 'Reset View'. The 'Month' view is selected, and the ribbon also shows 'Arrangement' (Day, Work Week, Week, Month, Schedule View), 'Color', 'Daily Task List', 'Folder Pane', 'Reading Pane', 'To-Do Bar', 'People Pane', 'Reminders Window', 'Open in New Window', and 'Close All Items'. Below the ribbon, the calendar shows the month of May 2017. The current date is Wednesday, May 3rd. A weather forecast for London, Canada is shown, with today at 52°F/39°F, tomorrow at 42°F/40°F, and Friday at 45°F/37°F. A search bar for the calendar is also visible.

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
Apr 30	May 1	2	3	4 12:00pm Bersin by Deloitte Webinar The New Bersin by Deloitte Leadership Framework; Online Webinar;	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)

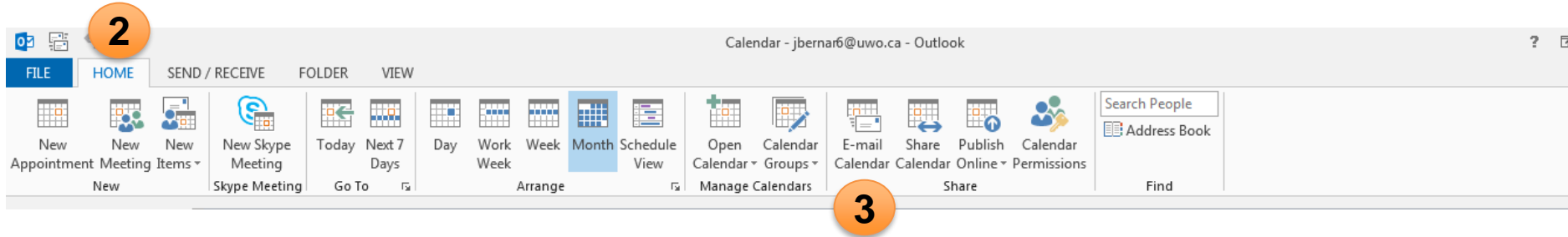
Customize Your Calendar:

The screenshot shows the Outlook calendar interface. The ribbon is set to 'VIEW'. Callout 1 points to the 'Time Scale' dropdown menu. Callout 2 points to the 'Color' dropdown menu. Callout 3 points to the 'Daily Task List' dropdown menu. Callout 4 points to the weather and location information at the top of the calendar grid.

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
Apr 30	May 1	2	3	4 12:00pm Bersin by Deloitte Webinar The New Bersin by Deloitte Leadership Framework; Online Webinar;	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20

- 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**.

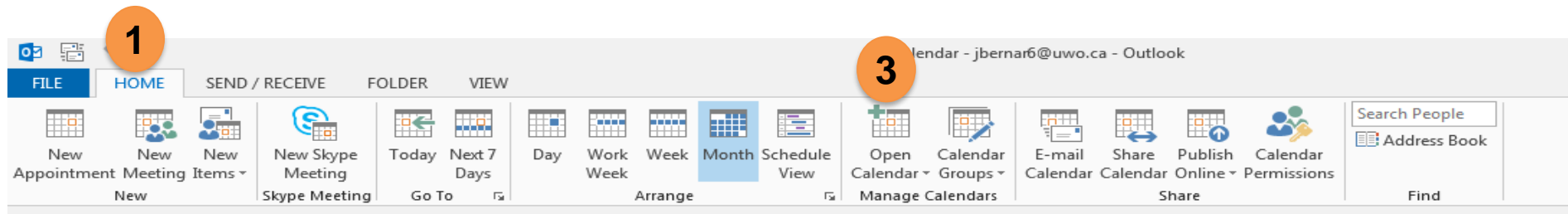
Delegate Calendar (= Manage)

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.

The screenshot shows the Outlook interface. On the left, a blue sidebar contains a list of options: Info (highlighted with a red circle and the number 2), Open & Export, Save As, Save Attachments, Print, Office Account, Options, and Exit. The main content area is titled 'Account Information' and displays the email address jbernar6@uwo.ca and 'Microsoft Exchange'. Below this, there is a '+ Add Account' button and a section for 'Account and Social Network Settings' with a dropdown arrow. A red circle with the number 3 highlights the 'Account Settings' dropdown. Other sections visible include 'Automatic Replies (Out of Office)' and 'Mailbox Cleanup'.

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

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Schedule a Meeting

The screenshot shows the Outlook 'Schedule a Meeting' dialog box. The title bar reads 'Untitled - Meeting'. The ribbon is set to 'MEETING'. The 'Appointment' button is highlighted with a callout '2'. The 'Scheduling Assistant' button is highlighted with a callout '5'. The 'To...' field is empty, and the 'Subject' field is highlighted with a callout '3'. The 'Location' field is empty. The 'Start time' is set to 'Thu 5/4/2017 8:00 AM' and the 'End time' is 'Thu 5/4/2017 8:30 AM'. The 'Room Finder' button is highlighted with a callout '4'. The 'Options' section includes 'Show As: Busy', 'Reminder: 15 minutes', 'Recurrence', 'Time Zones', and 'Room Finder'. The 'Room Finder' panel is open on the right, showing a calendar for May 2017 with the 4th highlighted. The 'Room Finder' panel also has a callout '6'.

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

FILE MEETING INSERT FORMAT TEXT REVIEW

Calendar Appointment Scheduling Assistant Skype Meeting Meeting Notes Cancel Invitation Address Book Check Names Response Options Show As: Busy Recurrence Time Zones Room Finder Categorize Private High Importance Low Importance 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 All day event
End time: Thu 5/4/2017 8:30 AM

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

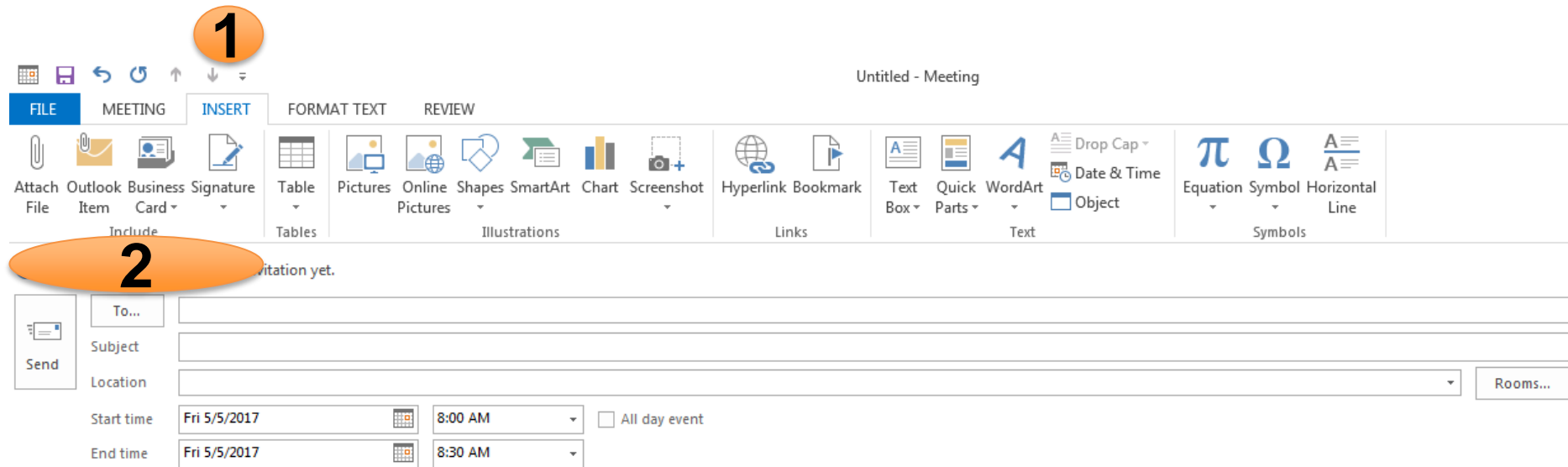
Choose an available room:

- 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

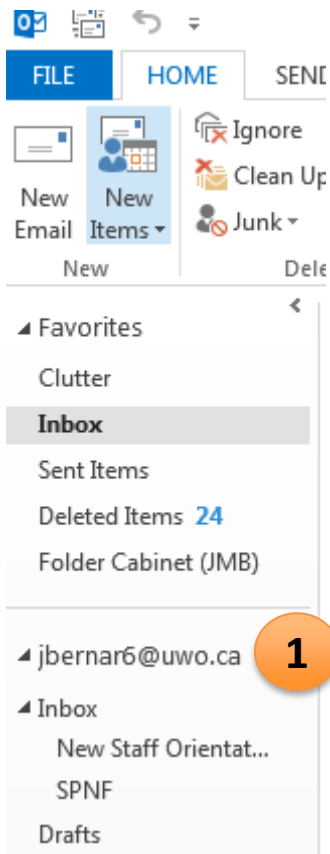
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Sharing Email Folders

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

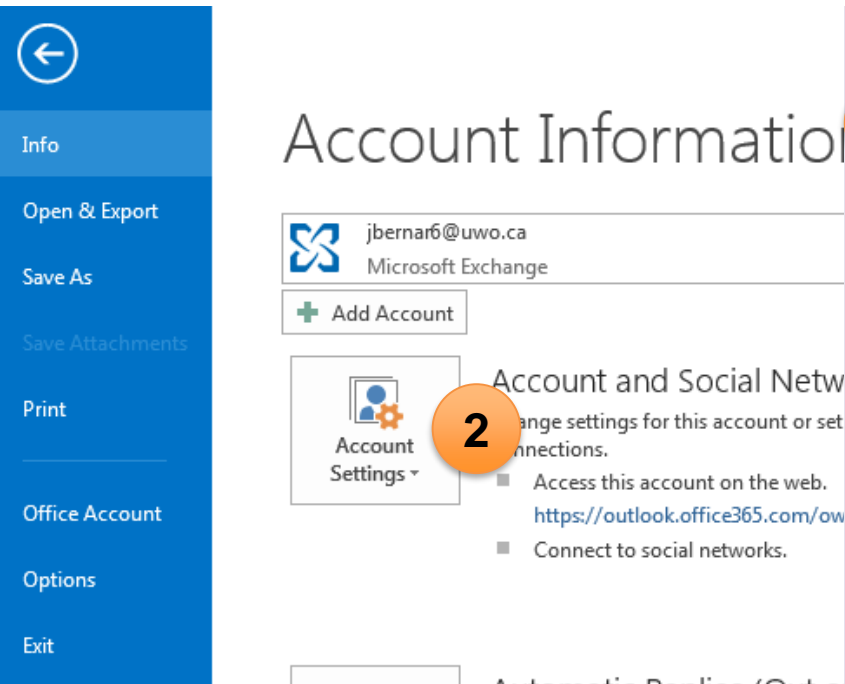
Providing Permission



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.

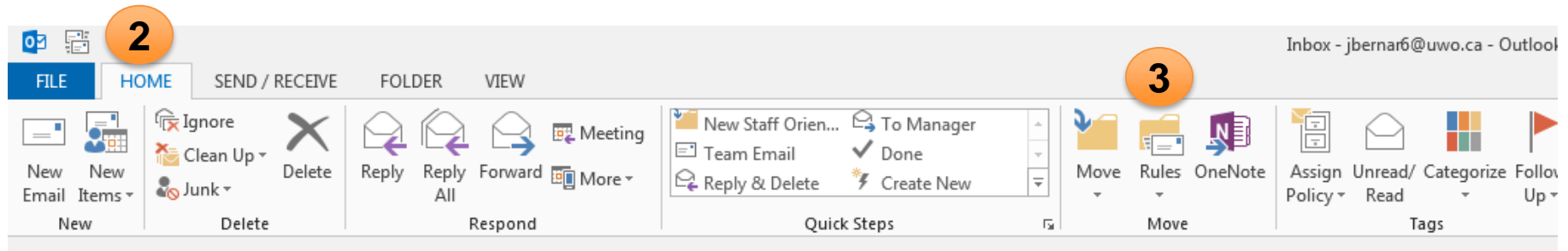
To share additional folders/subfolders, right-click on the folder or subfolder, click on **Properties** and then click on the **Permissions tab** of the folder you wish to share, and follow steps 2-7 above.

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




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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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