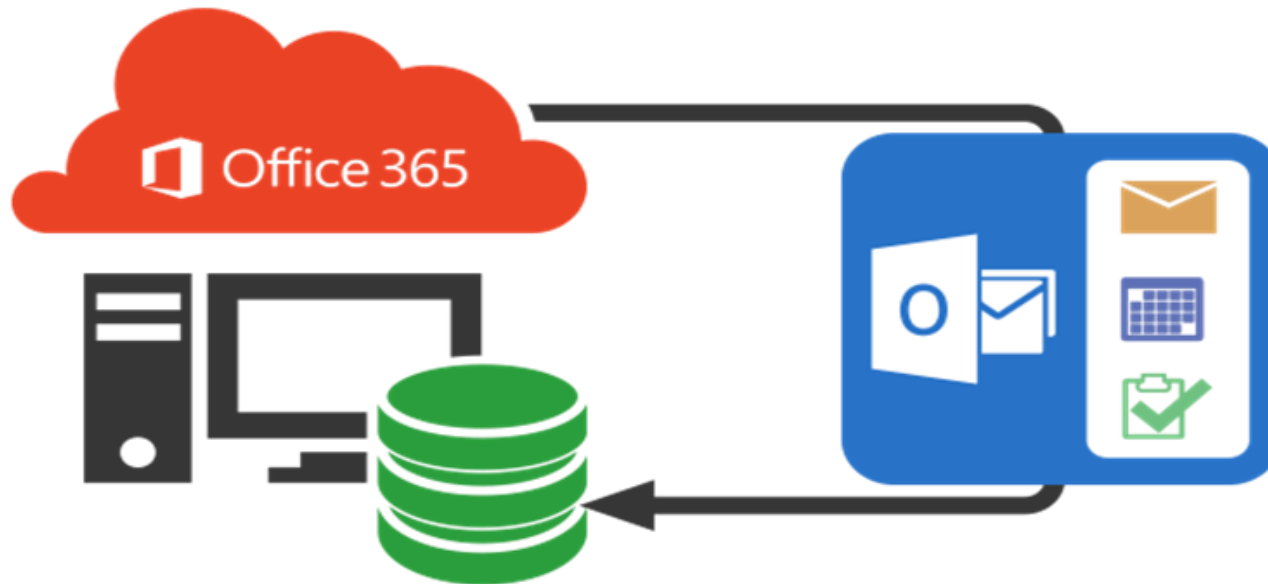




Schulich  
MEDICINE & DENTISTRY

# *“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**

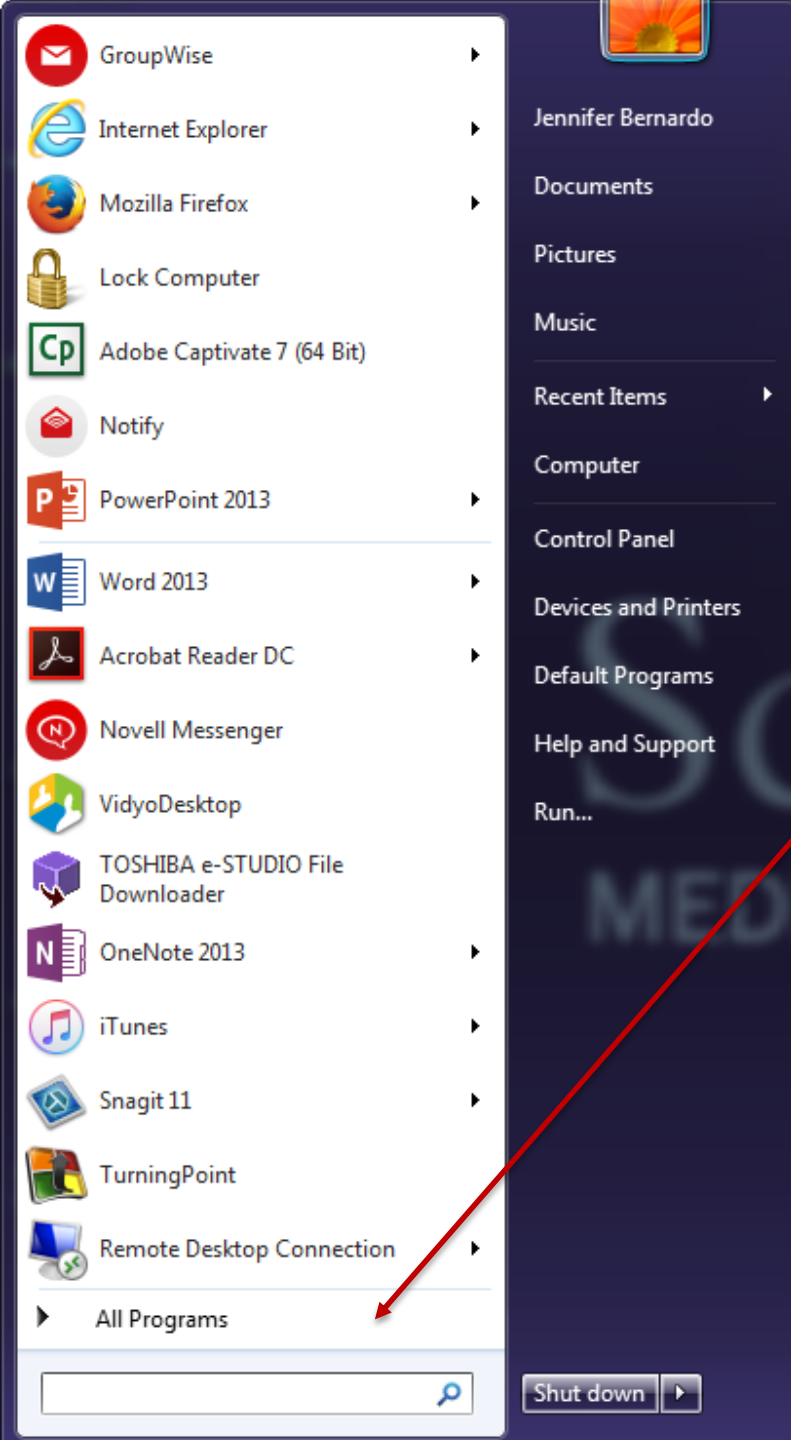
# Getting Started:

- 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

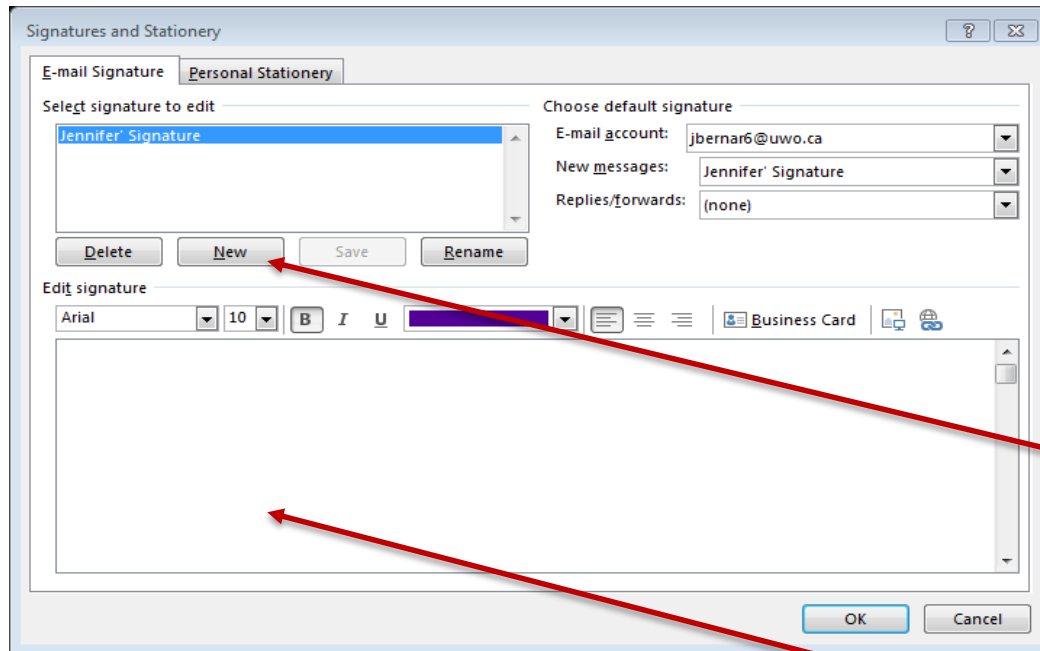
Sign in

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

© 2013 Microsoft Help

1. [www.myoffice.uwo.ca](http://www.myoffice.uwo.ca)
2. Enter Western Email Address  
([jsmith6@uwo.ca](mailto: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)

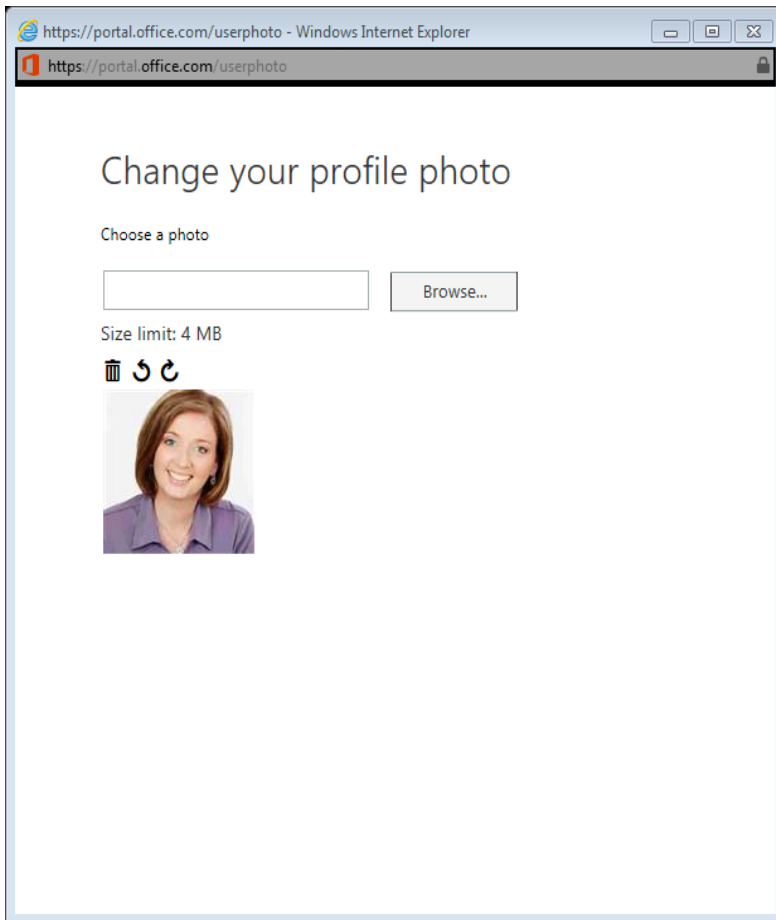
The screenshot shows the Outlook Web App (OWA) interface. The browser address bar displays <https://outlook.office365.com/owa/?path=/options/mail/signatures>. The page title is "Email signature". The "Options" sidebar on the left is expanded to "Mail" > "Layout" > "Email signature". The main content area shows the "Email signature" settings with a text editor containing the signature: "Jennifer Bernardo, MEd, CTDP | Instructional Trainer  
Schulich School of Medicine & Dentistry | Western University  
Clinical Skills Building RM 3720 | London ON N6A 5C1  
ph: 519-661-2111 x8125 | e: [jennifer.bernardo@schulich.uwo.ca](mailto:jennifer.bernardo@schulich.uwo.ca)". The "Settings" pane on the right is open to "Your app settings" > "Mail". A central text box contains six numbered steps with red arrows pointing to the corresponding elements in the screenshot.

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)

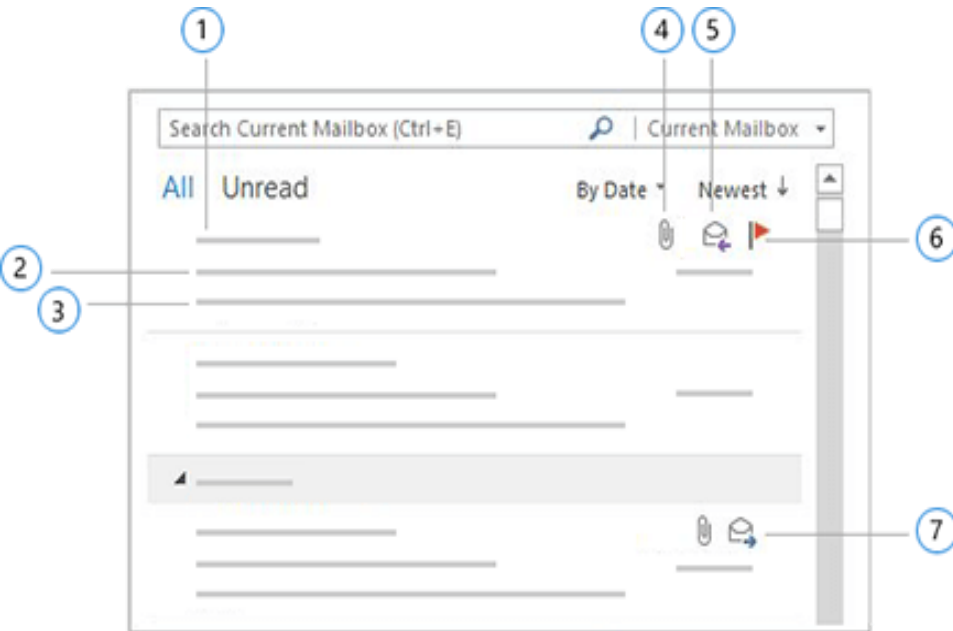


1. [www.myoffice.uwo.ca](http://www.myoffice.uwo.ca)
2. Enter Western Email Address (jsmith6@uwo.ca)
3. Enter Western Password
4. Select “Your Name” top right hand corner
5. Select **View Account** on right hand side of screen
6. Select **Personal Info** on the left hand tool bar
7. Select **Upload/Change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

# Viewing, Creating & Sending Email

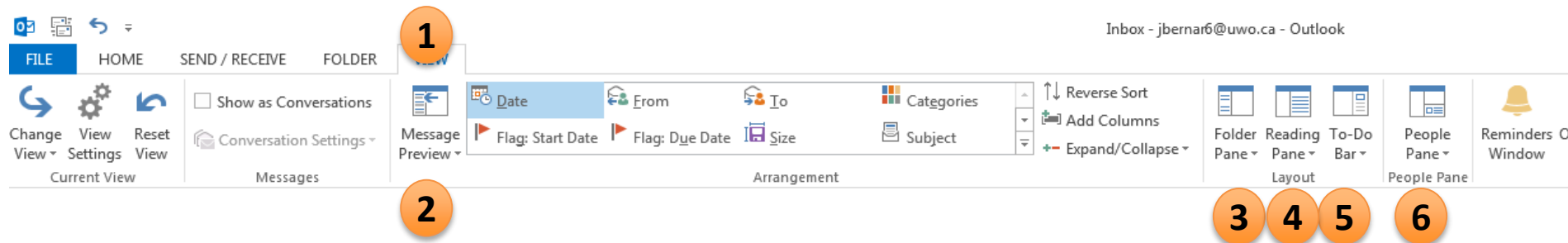
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# Viewing Email



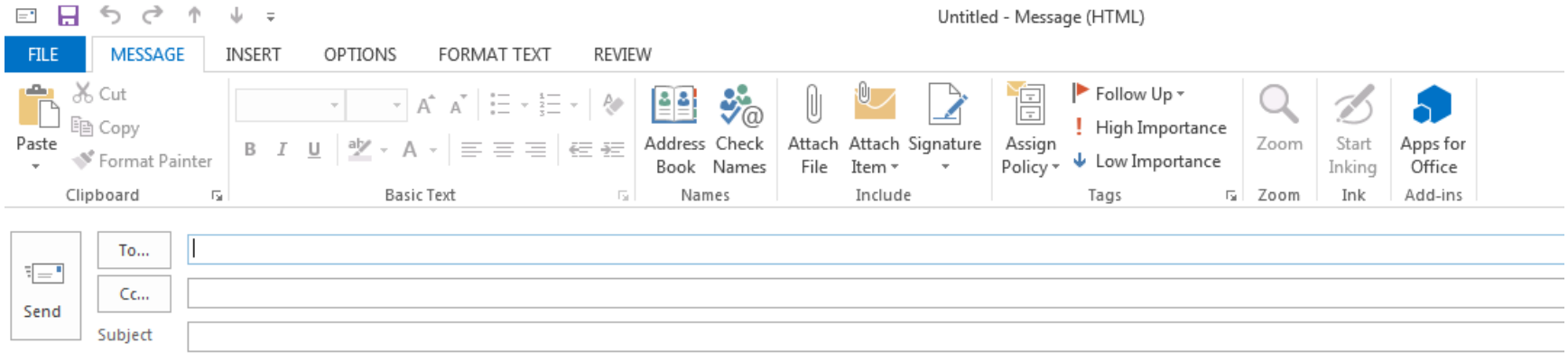
1. Who the email is from.
2. Subject and date.
3. First sentence of the email.
4. **Paperclip** – email has an attachment.
5. Envelop with an **arrow pointing left** – you have replied to this email
6. **Red flag** - email marked for follow-up.
7. Envelope with **arrow pointing right** - you have forwarded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

# Viewing Email: Setting Viewing Preferences



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

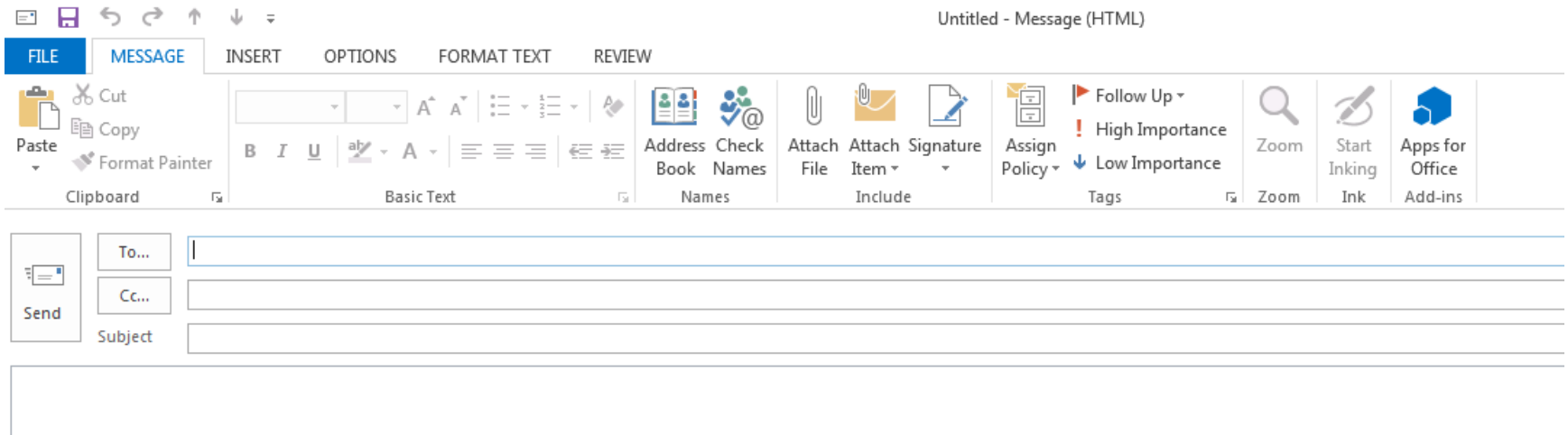


## Overview:

- 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

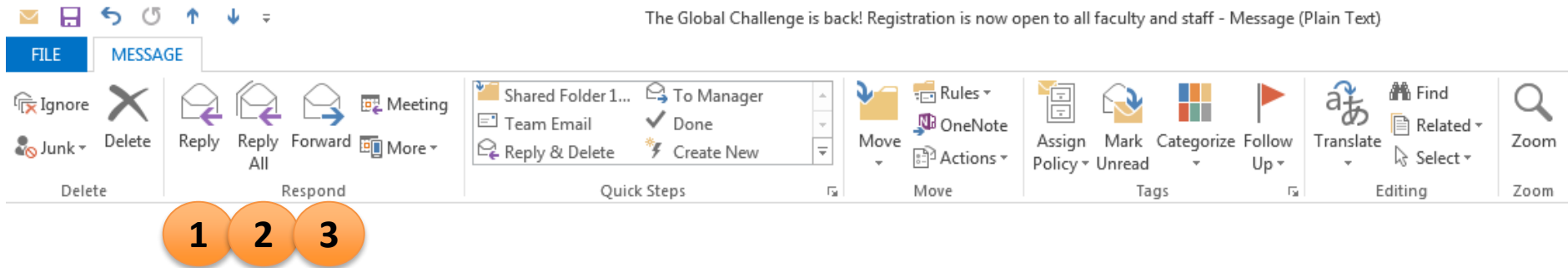


## Overview:

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

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

# Replying/Forwarding Email

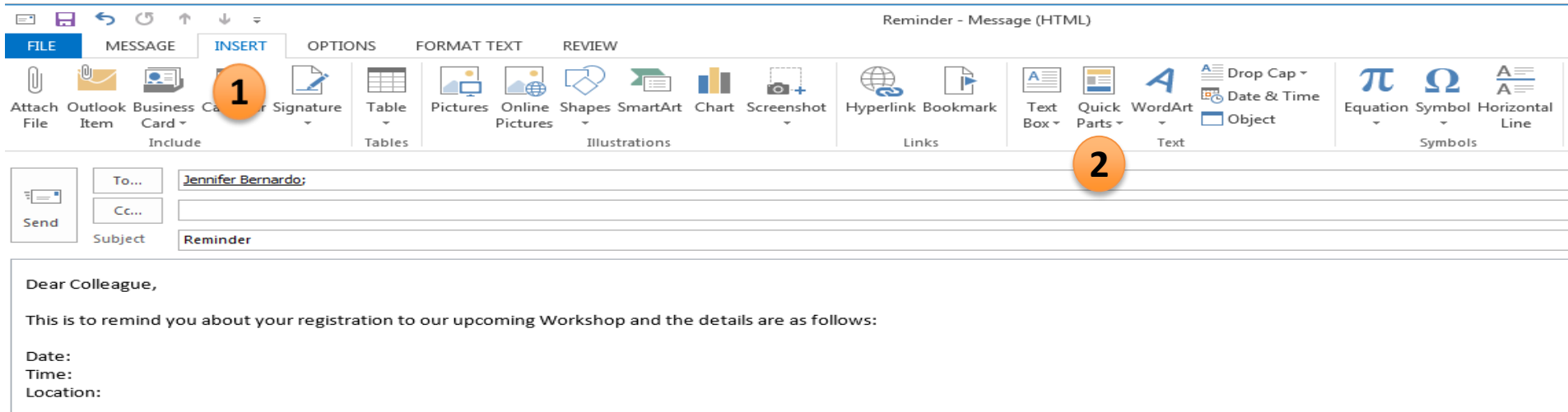


## Overview:

- 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).

The screenshot shows the Outlook context menu for an email titled "test". The menu is displayed on a blue background with a white arrow icon at the top left. The menu items are: Info, Save, Save As, Save Attachments, Print, Close, Office Account, and Options. The "Options" menu item is expanded, showing a list of actions: "Set Permissions", "Move to Folder", "Message Delivery Report", "Message Resend and Recall", and "Properties". Each action has a small icon and a brief description. The "Message Resend and Recall" option is highlighted with a blue background. A large orange circle with the number "4" is overlaid on the right side of the screenshot.

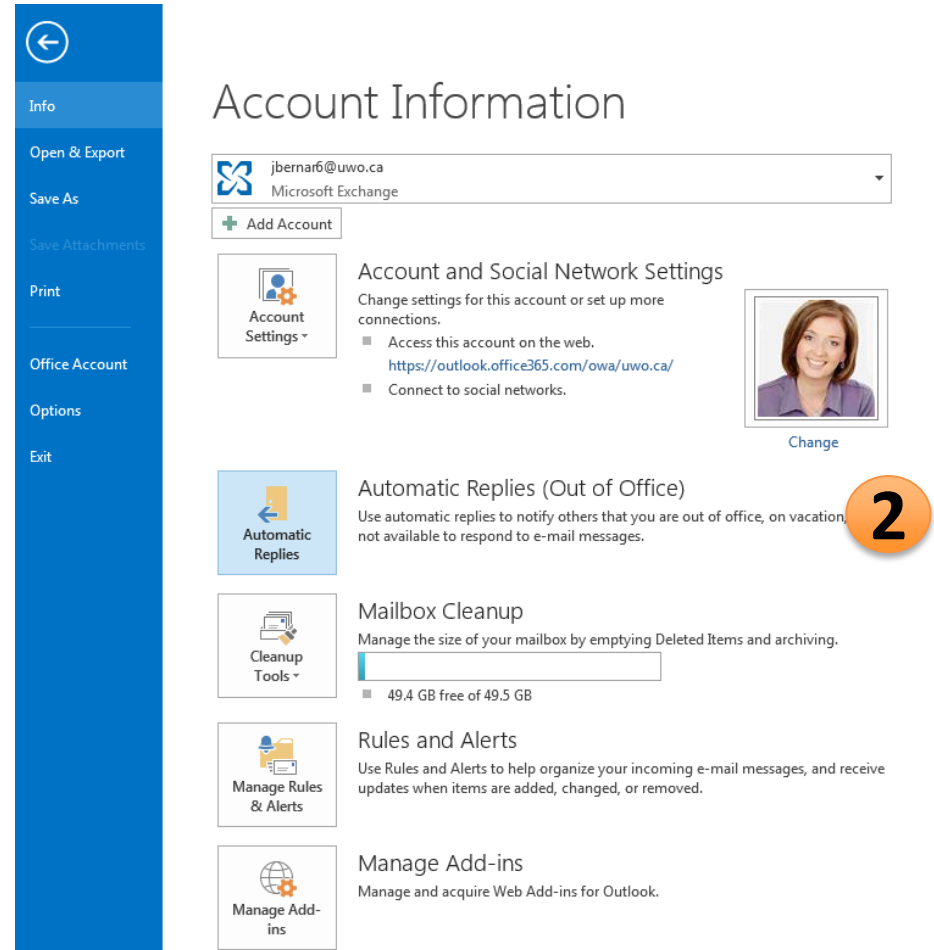
test - Message (HTML)

test

- Set Permissions  
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 to Folder  
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

# 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)



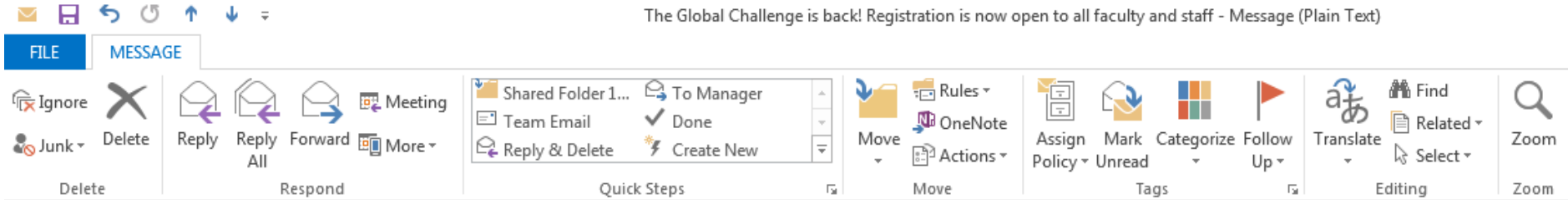
The screenshot shows the Outlook 'Account Information' page. On the left is a blue navigation pane with options: Info, Open & Export, Save As, Save Attachments, Print, Office Account, Options, and Exit. The main content area is titled 'Account Information' and shows the account 'jbernar6@uwo.ca' on Microsoft Exchange. Below this are several settings sections: 'Account and Social Network Settings' (with a profile picture and a 'Change' link), 'Automatic Replies (Out of Office)' (with a '2' in a blue circle next to it), 'Mailbox Cleanup' (showing 49.4 GB free of 49.5 GB), 'Rules and Alerts', and 'Manage Add-ins'.

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

# Managing and Organizing your Email

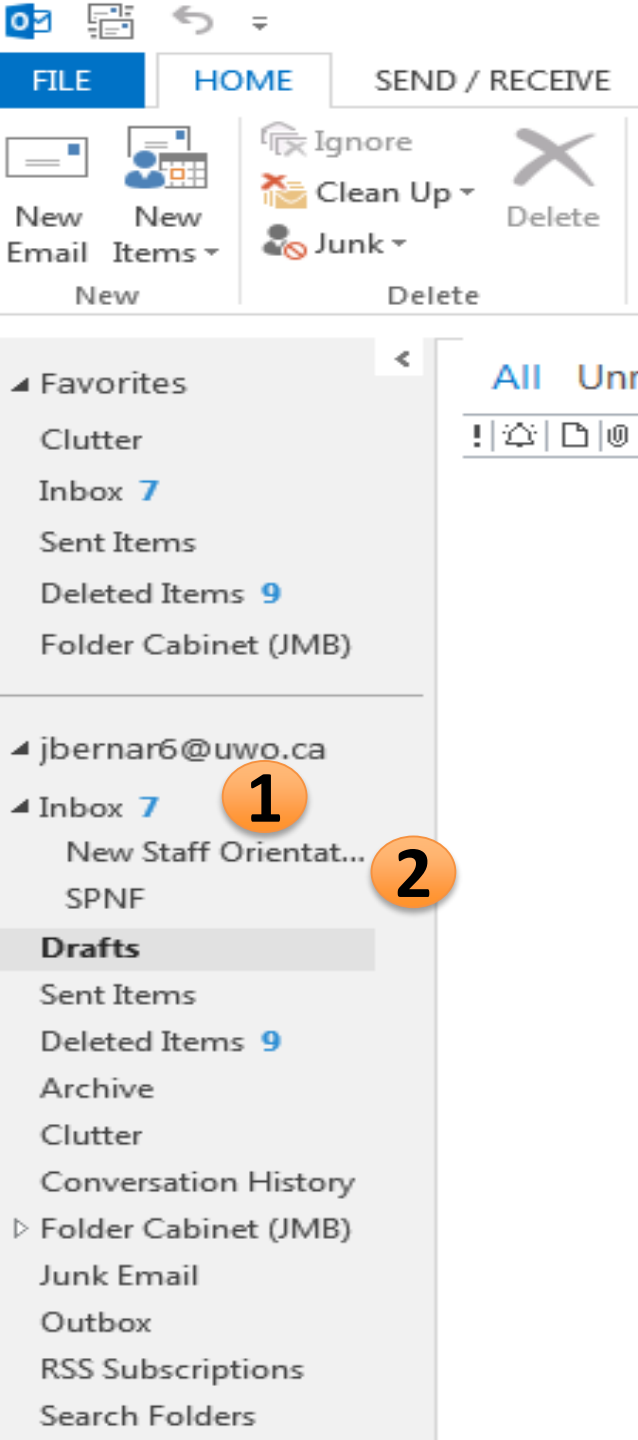
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**Pages 19 - 22**

# Setting Email Colour Coding Flags, Reminders, &



## Overview:

- 1 Colour Coding
- 2 Flags
3. Reminders



# Email Folders

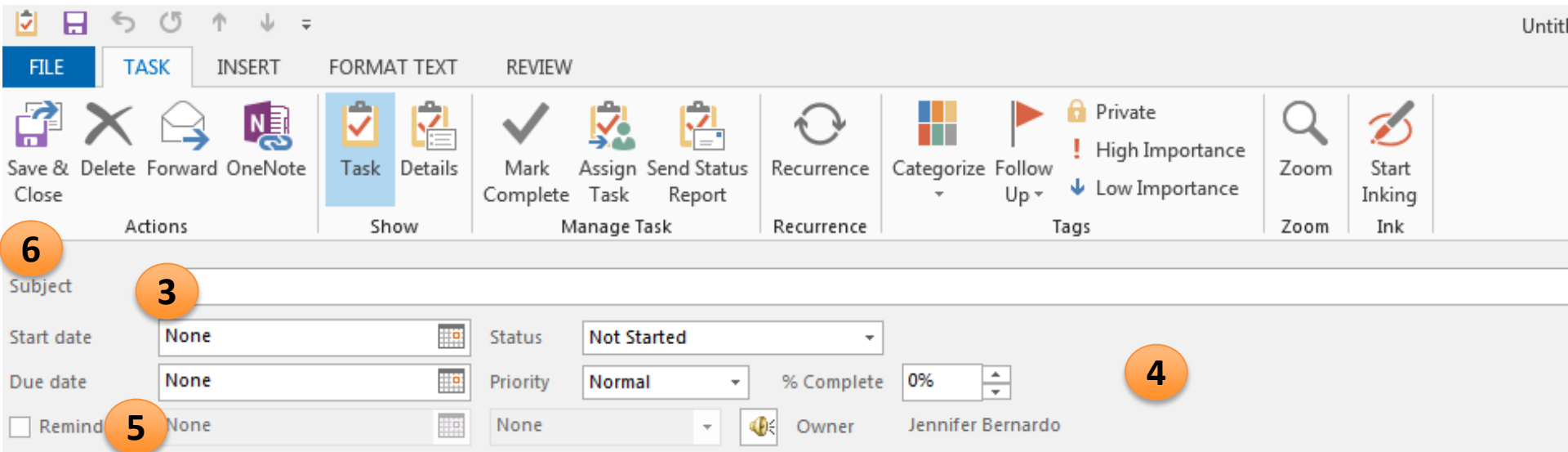
## Create a folder or subfolder:

- 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

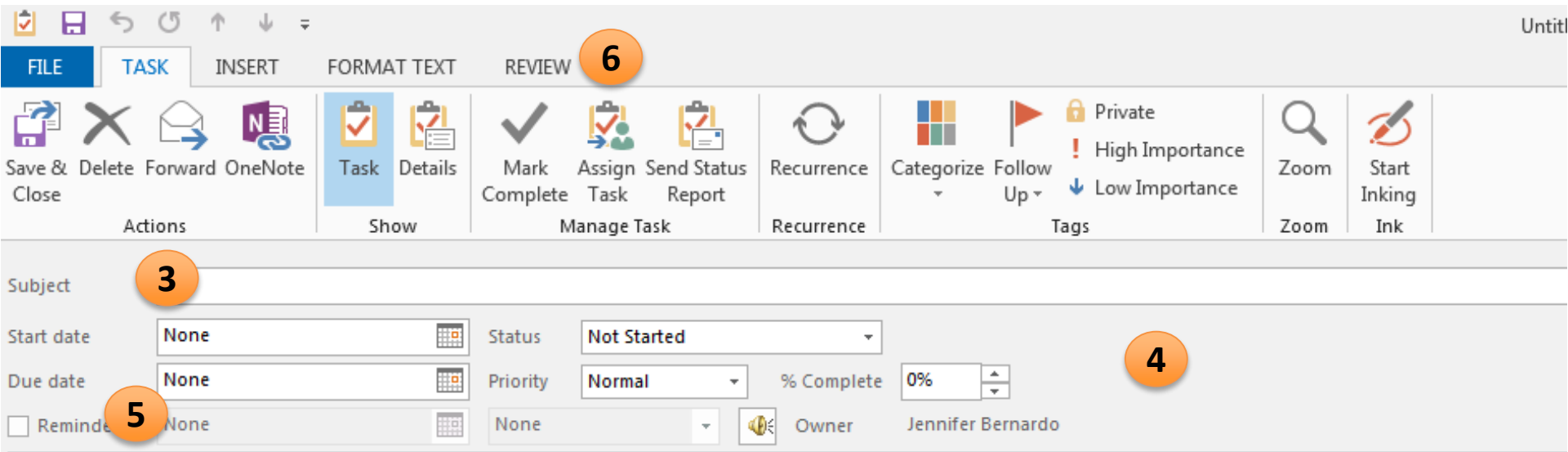


1. Select Tasks.
2. Select New Task.
3. In Subject, type the subject of the task.
4. Select a Start Date, Due Date, Status, Priority, or % Complete.
5. Select Reminder to set a reminder for the task.
6. Finish by selecting Save & Close.

# Creating Tasks - Practice

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

# Assigning Tasks



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 5<sup>th</sup>** 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](#)

[http://www.schulich.uwo.ca/information/services/resources/office\\_365/outlook\\_training\\_resources/index.html](http://www.schulich.uwo.ca/information/services/resources/office_365/outlook_training_resources/index.html)



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