Schulich

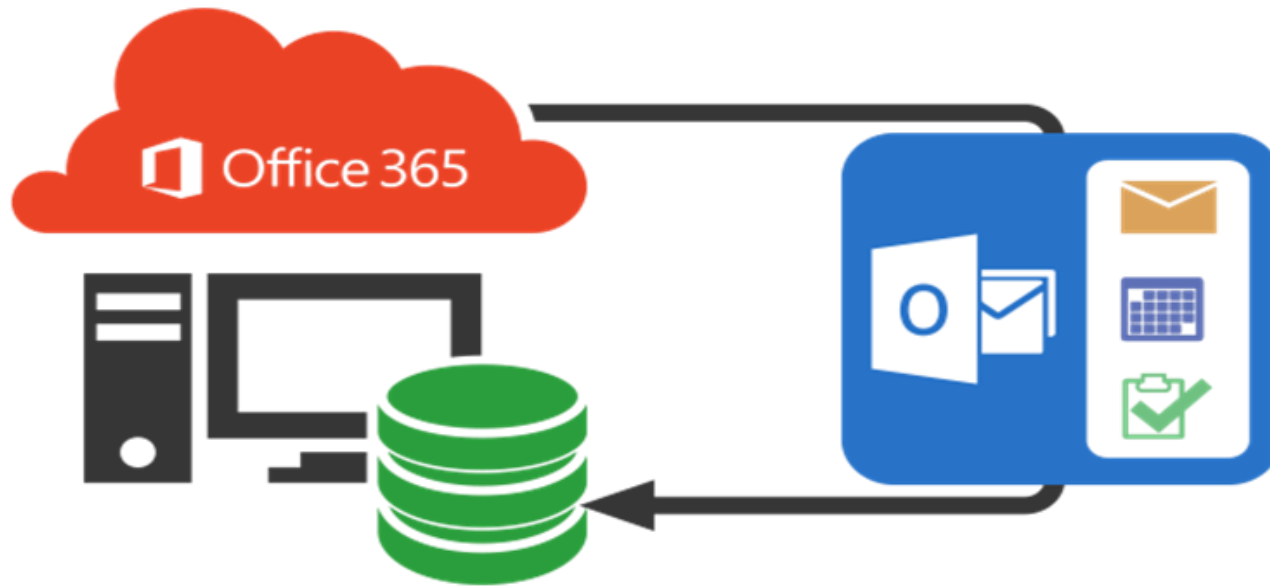## MEDICINE & DENTISTRY

"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
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Adding Contacts

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. **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)

-
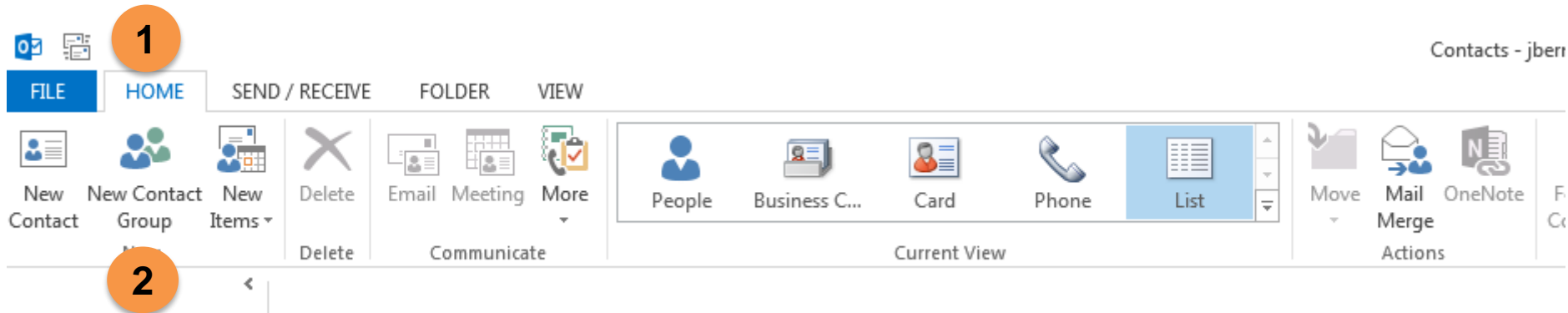
Create a contact group:

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
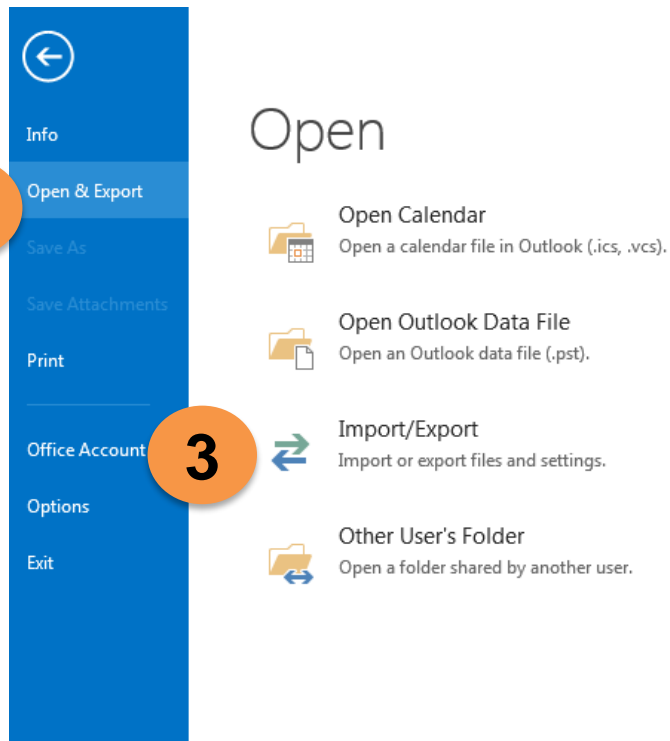
1. **Select File**

2. **Select Open & Export**

3. **Select Import/Export**

Managing, Organizing & Sharing Calendars

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View Your Calendar:

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

Customize Your Calendar:

1. Time Scale/Zone
2. Colour
3. Daily Task List
4. Weather Location

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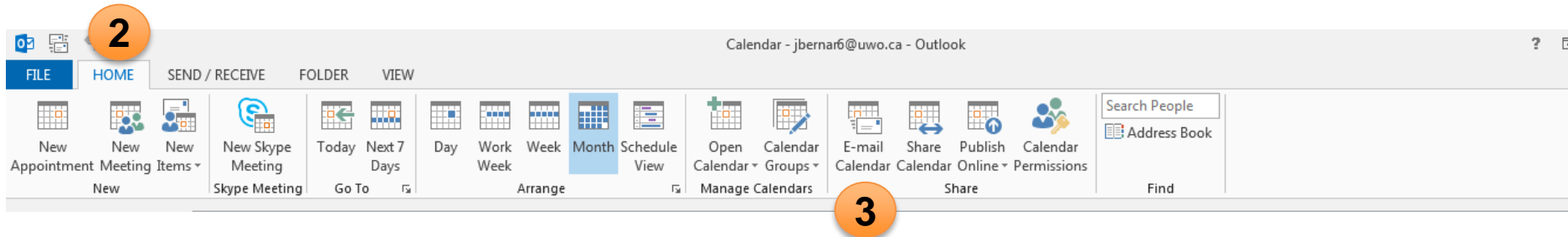
1. Select **Calendar**.
2. Select **Home**
3. Select **E-mail Calendar**.
4. Select the **Calendar**, **Date Range**, and **Detail**.
5. Select **Advanced** to change the **E-mail Layout**, **Daily schedule**, and **List of events**.
6. Select **OK**. (**NOTE:** Your calendar entries populate in the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

Share Calendar (= Access)
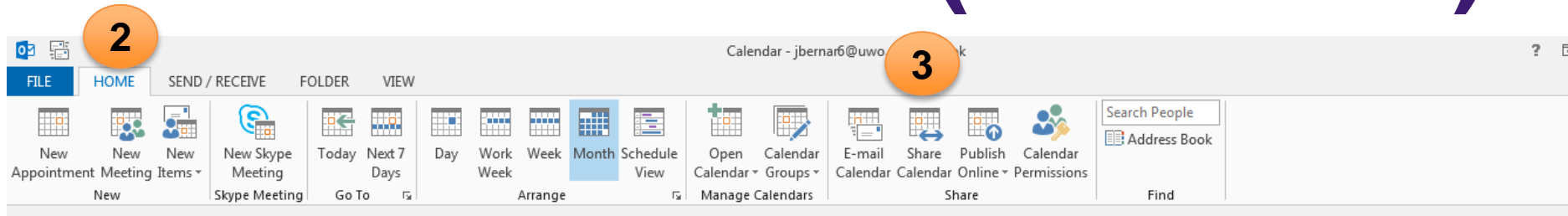
1. Select **Calendar**.
2. Select **Home**
3. Select **Share Calendar.**
4. Select **Individuals**
5. Select **Level of Details** to share
6. Select **Check Box** if you would like to **Request to review Recipients Calendar.**
7. Select **Send**
8. Select **Yes** to Confirm sharing of Calendar before 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.

Account Information

jbernar6@uwo.ca
Microsoft Exchange

+ Add Account

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.

Account Settings ▾

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

Automatic Replies

Mailbox Cleanup
Manage the size of your mailbox by emptying Deleted Items a

Info · Open & Export · Save As · Save Attachments · Print · Office Account · Options · Exit

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

Opening/Viewing Multiple Calendars
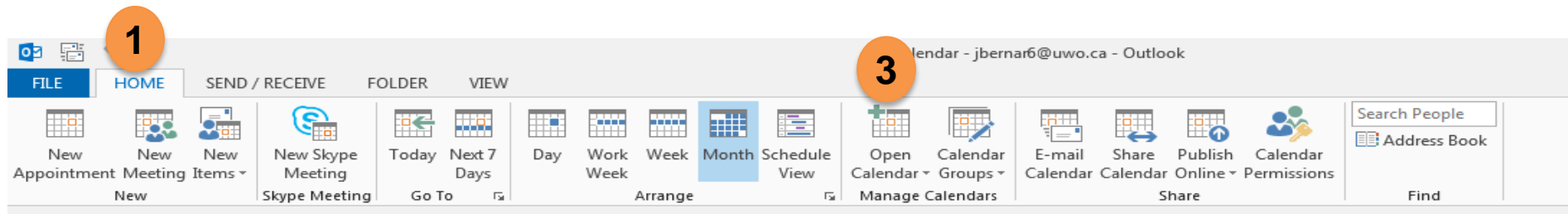
1. Select **Calendar**.
2. Select **Home**
3. Select **Open Calendar**
4. Select **From Address Book…**
5. Select a contact
6. Select **Calendar**
7. Select **OK**.

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Scheduling & Organizing Meetings

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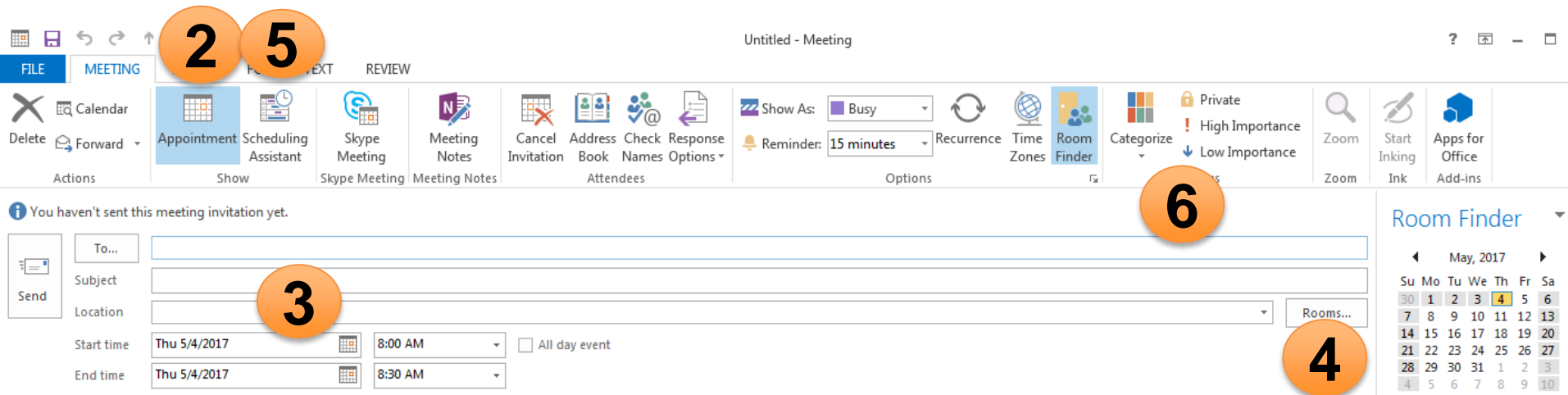
1. Select Home
2. Select New Appointment
3. Insert Subject, Location, and time
4. Book Room
5. Add Invitees ("To", "Scheduling Assistant")
6. Other Options: Colour Code, Private, Importance

In Outlook, **Recipients of Meetings Can Accidently 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

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
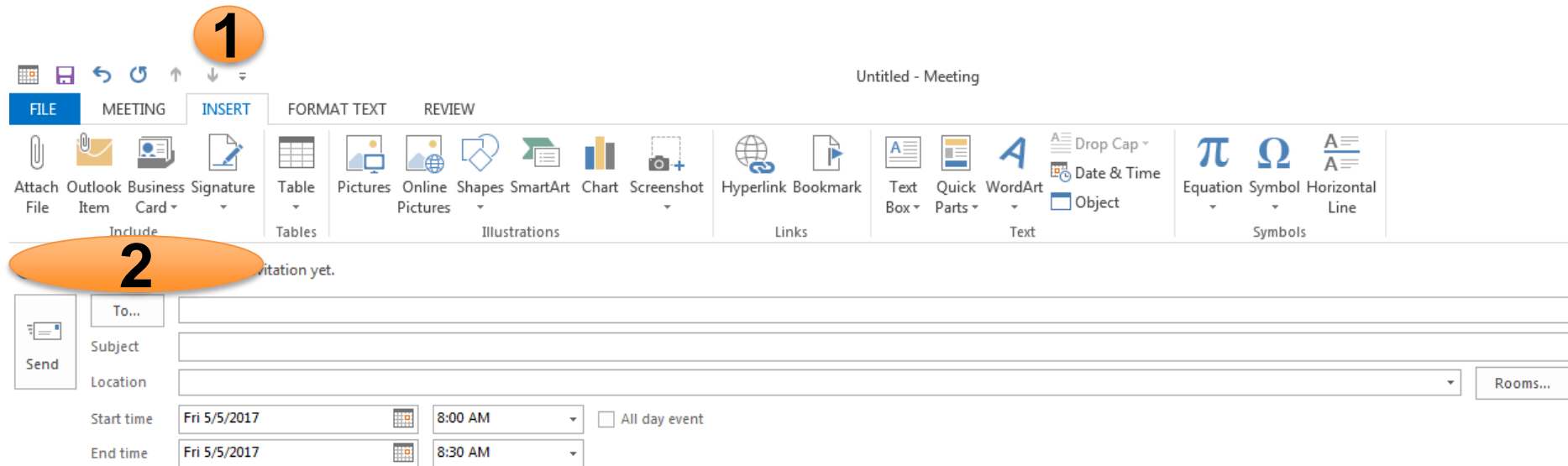
1 Select Insert

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

Outlook Client 2013 User Guide
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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
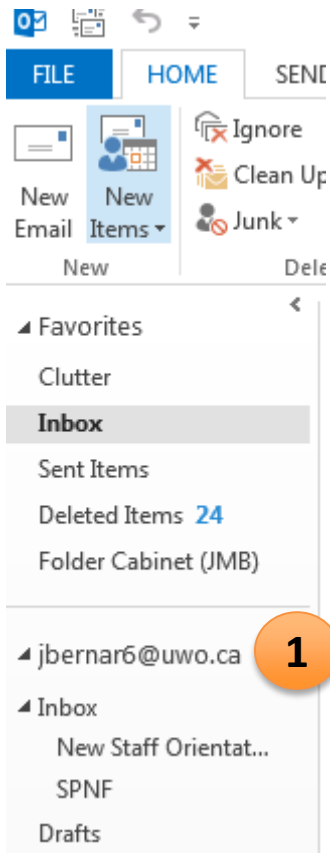
1. Right-click on your Mailbox
2. Select **Folder Permissions.**
3. Select the **Permissions** tab.
4. Select the **Add** button.
5. Select the person you wish to give permission
6. Select **Add** button.
7. Press the **OK** button.
8. Click on the person's name & appropriate permissions from (Reviewer 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.

FILE   HOME   SEND

Ignore
Clean Up
New Email   New Items ▾   Junk ▾
New   Dele

◂ Favorites
Clutter
Inbox
Sent Items
Deleted Items 24
Folder Cabinet (JMB)

◂ jbernar6@uwo.ca
◂ Inbox
New Staff Orientat...
SPNF
Drafts

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Accessing Email Folders
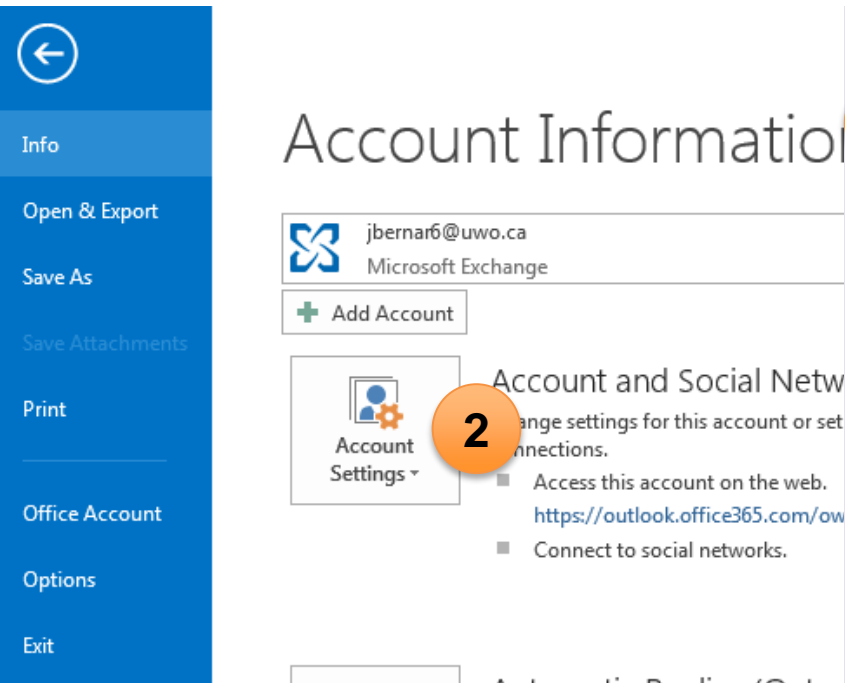
1. Choose **File**
2. Select **Account Settings**.
3. Select your **Office 365 account** and click the **Change** button.
4. Click the **More Settings** button.
5. Click the **Advanced** button.
6. Under Mailboxes, 'Open these additional mailboxes:' click on the Add button and type the person's name 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"
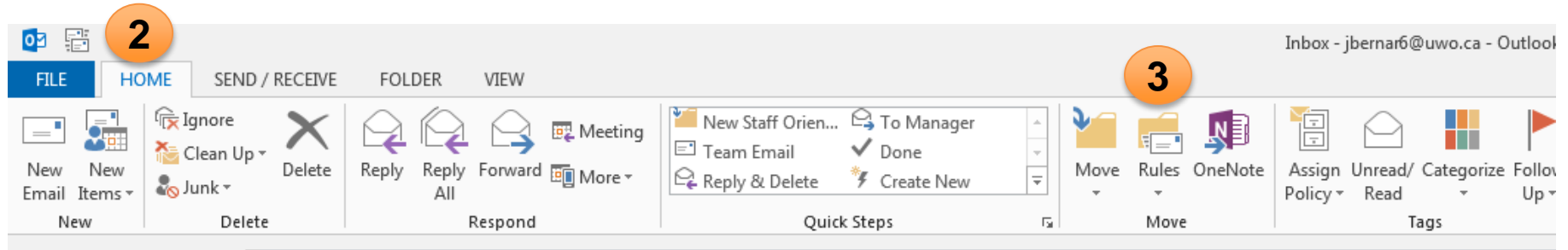
1. Select the email message for which you want to create a rule.
2. Select **Home**
3. Select **Rules.**
4. Suggested rules appear,
5. Select an option:
6. Select a destination folder, and then select OK.

Following Migration from GroupWise, <u>you will need to re-create "Rules" in Outlook</u>

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

Information Services

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Search the School | Go! |

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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