



UBC FASmail Usage Guide for Email and Calendaring (Microsoft Outlook 2013)

Provided by
UBC Information Technology



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About this Guide

This usage guide is intended to showcase E-mail, Calendaring and the Global Address List lookup in FASmail using Outlook 2013.



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The Outlook Layout

The Outlook client separates the Email layout into various components including:

- Email accounts and folders
- Listing of Emails
- Preview window for an Email
- Calendar with reminders

The rest of this guide will give you an introduction to each of the components above.



Outlook layout

The screenshot displays the Outlook interface for a 'UBC IT Test Account'. The ribbon at the top includes 'FILE', 'HOME', 'SEND / RECEIVE', 'FOLDER', and 'VIEW'. The left sidebar shows a hierarchy of folders under 'UBC IT Test Account', including 'Inbox 4', 'Drafts [2]', 'Sent Items', 'Deleted Items 2', 'Junk E-Mail', 'Outbox', 'RSS Feeds', and 'Search Folders'. The main pane shows a list of emails, with the top one selected. A red box highlights the 'Email Accounts & Folders' section in the sidebar. Another red box highlights the 'List of Emails for the account' section in the main pane. A third red box highlights the 'The selected Email's Content' section on the right. The selected email is from 'Young, Maria' with the subject 'Canceled:'. The content shows a calendar entry for Wednesday, June 12, 2013, from 11:00 AM to 11:30 AM AM, with the status 'Canceled:'. The bottom status bar shows 'ITEMS: 6 UNREAD: 4' and 'ONLINE'.



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Outlook Features - Tabs

Tabs in Outlook offer you the ability to quickly switch between Mail, Calendar, Contacts, and Tasks functionalities within the same Outlook 2013 window.

Examples:

- Clicking the Mail tab shows Email on your screen.
- Clicking the Calendar tab shows calendaring on your screen.



How to Compose an Email (1)

In order to compose an Email, ensure that you are in the Mail section.

Then, click on the “New Email” icon at the top left hand side to create a new Email message.



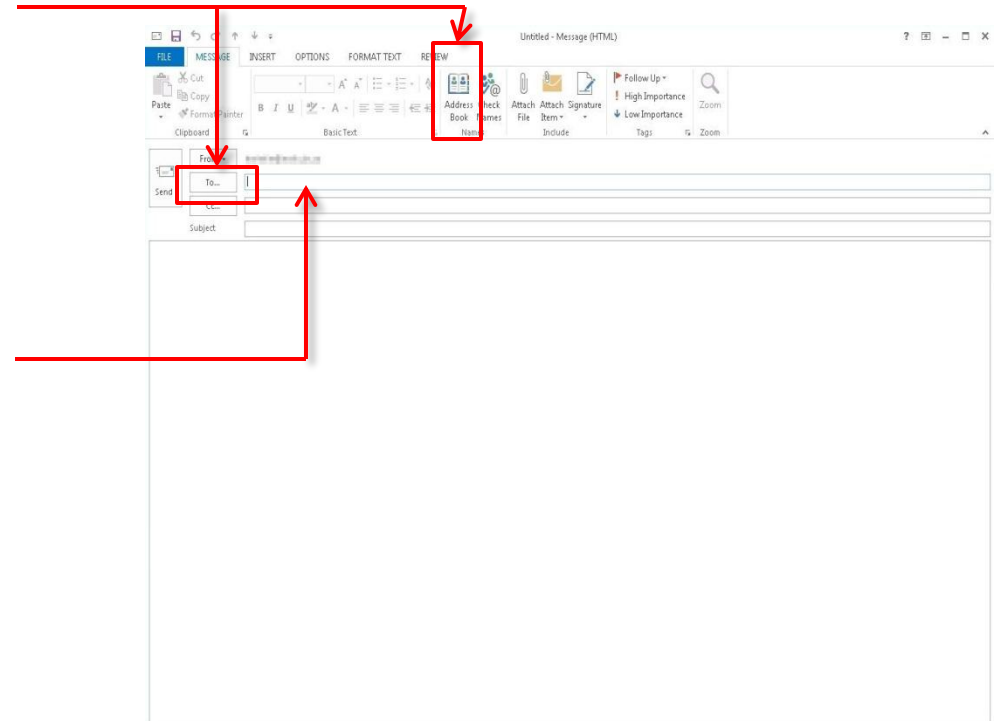
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How to Compose an Email (2)

Once the new Email box appears, you can search for an Email address by clicking on the “To...” button or on the Address Book button.

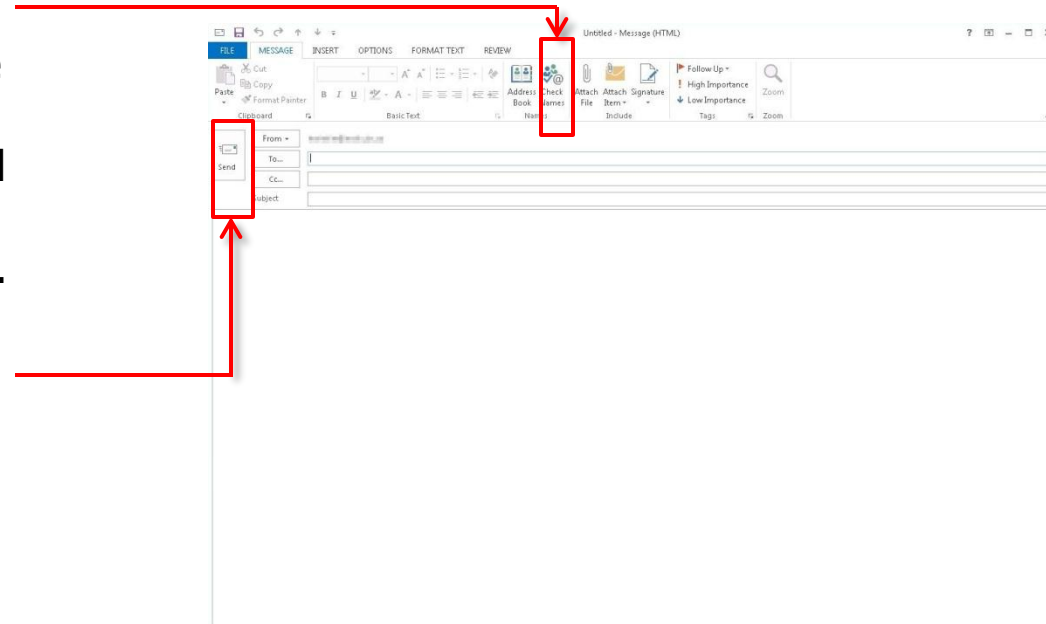
If you know the Email address of the intended recipient, you can type it into the Email box next to the “To...” button.



How to Compose an Email (3)

You can also type in a person's name [lastname, firstname] in the "To", "Cc", and "Bcc" fields and press "Check Names". FASmail will then try to look up their Email address in the Global Address List.

Type in the subject, content, and click the "Send" button to send your Email.



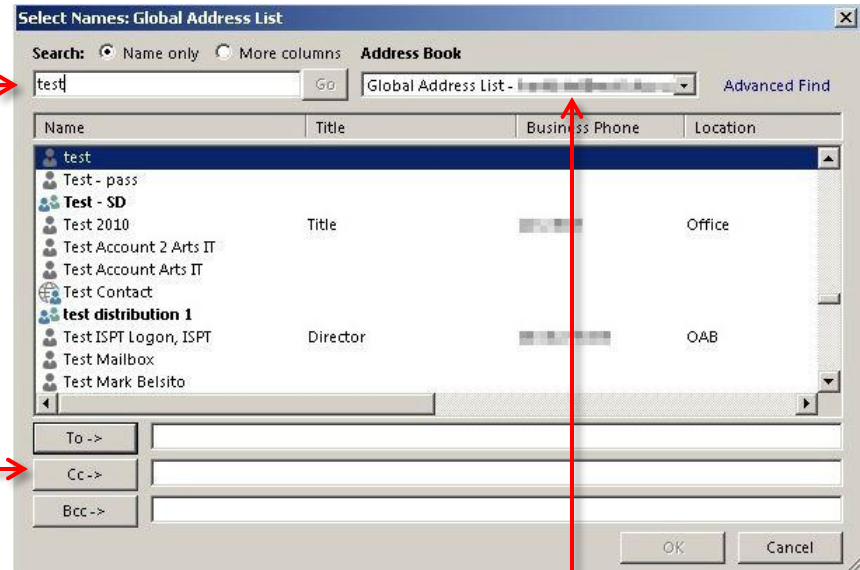
Using the Global Address List

Once you click on the "Address Book", the Global Address List will show up.

First, try to find a user [lastname, firstname] in search field, and select the appropriate entry from the search results.

Second, click on the "To", "Cc", or "Bcc" to add the result.

You can also narrow down the search results by selecting a department from the address book drop down list.

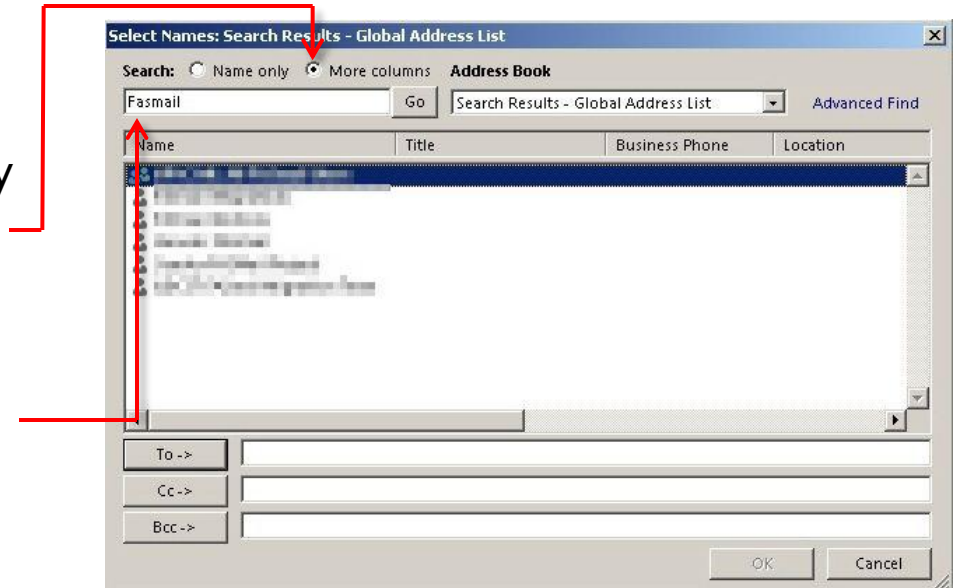


Using the Global Address List (2)

Advanced Search:

The advanced search is available by clicking on the “More columns” button.

This view allows you to perform partial name searches such as [firstname] while the “Name only” view requires exact [lastname, firstname] searches.

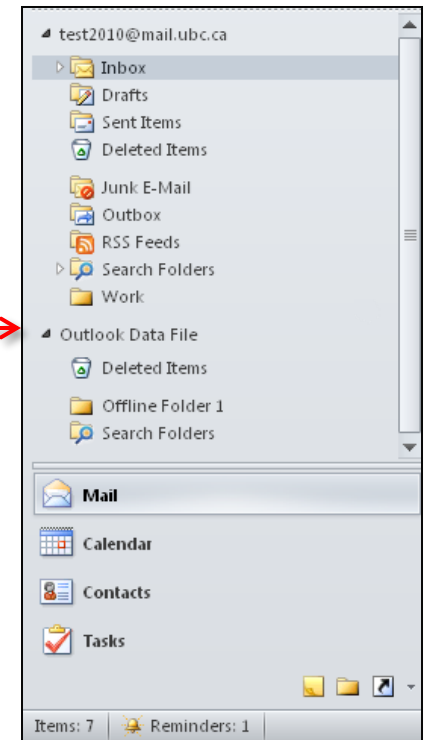


Outlook Data File

Personal/Archive Folders:

This folder contains archived Emails or large attachments.

Messages in these folders are typically stored locally on your own computer, while the contents inside the Inbox is stored on the server.



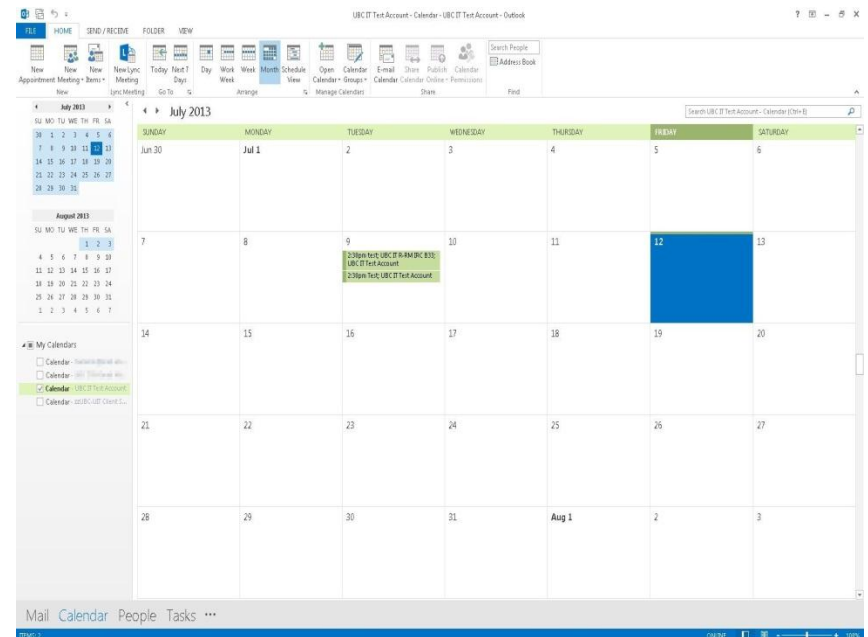
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The Calendar Tab

The Calendar tab gives you access to a multitude of features such as:

- Personal calendaring with day, week, or month views.
- Seeing recipient's availabilities, and sending conflict-free meeting requests.
- Sharing your calendar with trusted FASmail users such as an assistant.
- Setting reminders to trigger minutes to several hours before a meeting.
- Booking of resources such as meeting rooms and equipment (e.g. projectors.)



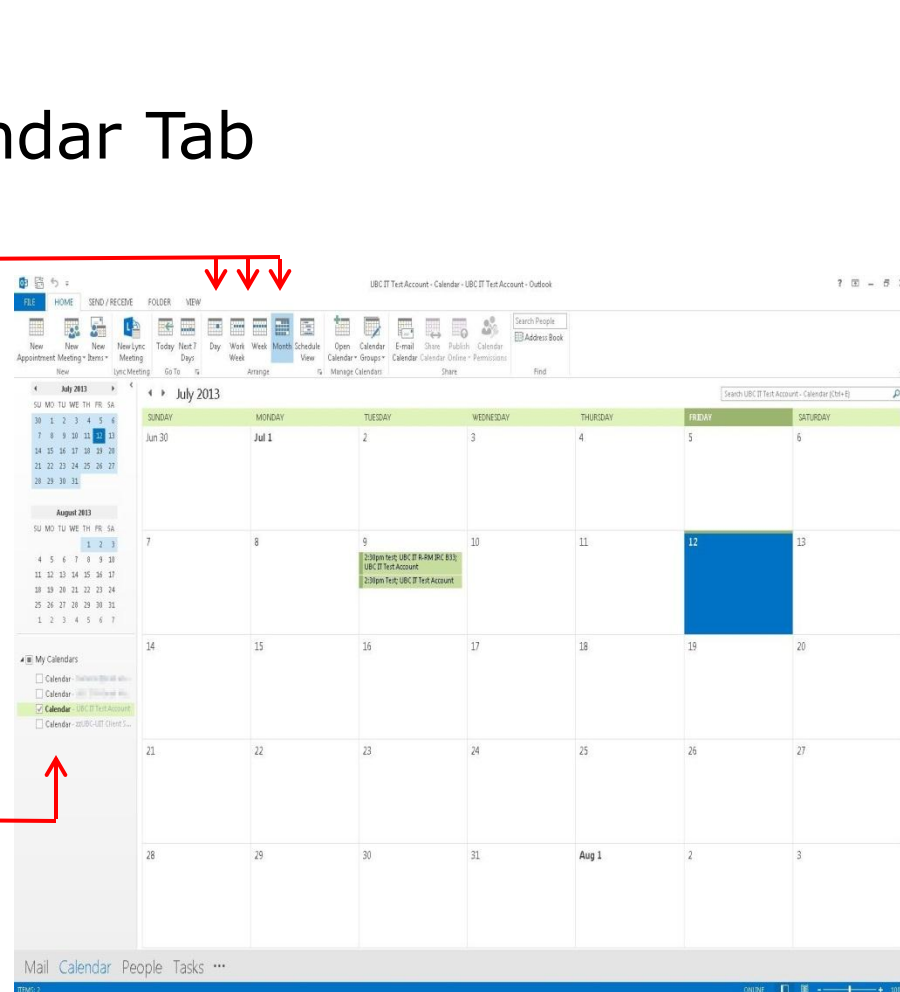
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The Calendar Tab

You can change the calendar view by clicking on “Day”, “Week”, “Month”, or “Work Week” views.

If you have access to public calendars, shared calendars, or delegated access to someone else’s calendar, they will show under “My Calendars”.



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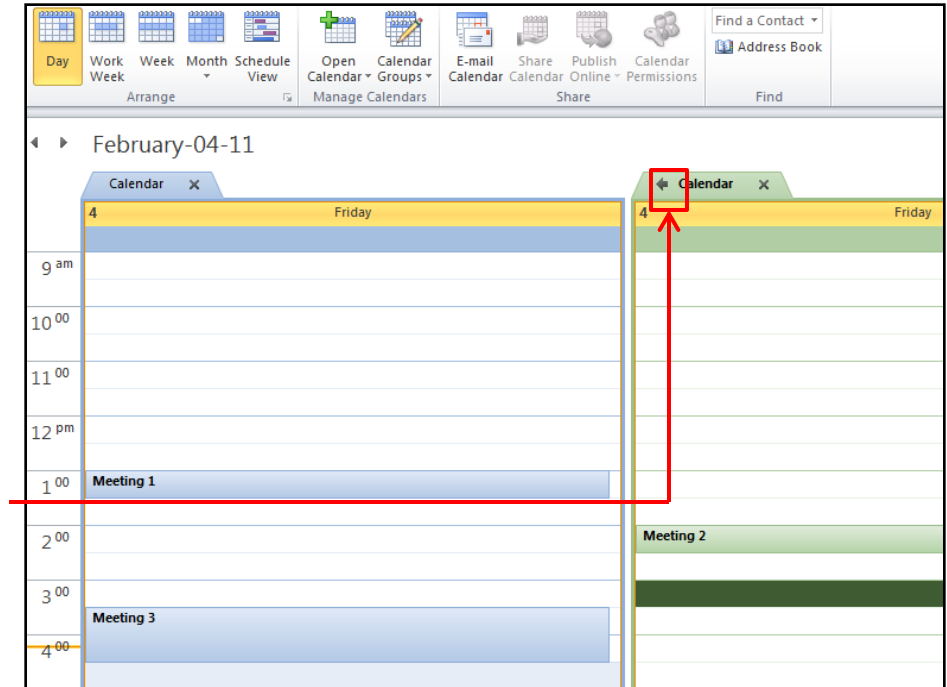
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Multiple Calendars and View Management (1)

With FASmail, you can view your own calendar along with other calendars side by side.

You can also superimpose calendars overtop of each other to see how your entire day looks like.

Simply click on the left arrow on each calendar to overlap them together.



Multiple Calendars and View Management (2)

Once they have overlapped, you can see what your work day looks like.

Options: Show As: Busy, Reminder: 15 minutes, Recurrence, Categorize, Private, High Importance, Low Importance, Tags.

February-04-11

Calendar x Calendar x

4 Friday

9 am

10⁰⁰

11⁰⁰

12^{pm}

1⁰⁰ Meeting 1

2⁰⁰ Meeting 2

3⁰⁰ Meeting 3

4⁰⁰

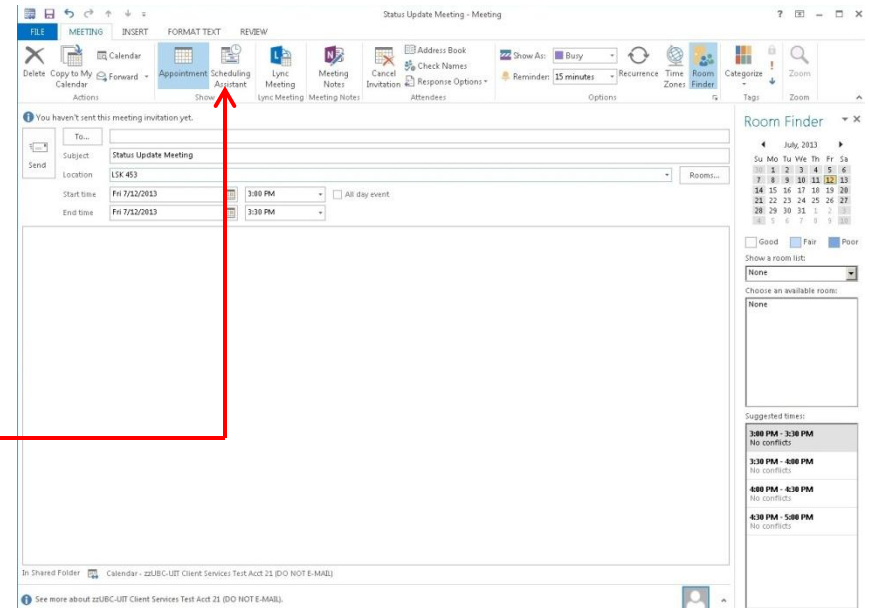


Scheduling a Meeting (2)

Once you click on “New Meeting”, a new window will appear.

Simply enter:

- Subject
- Date
- Start and end time
- Location*
- Click on “Scheduling Assistant”



**This feature is available only if your department has meeting rooms and equipment setup as resources.*



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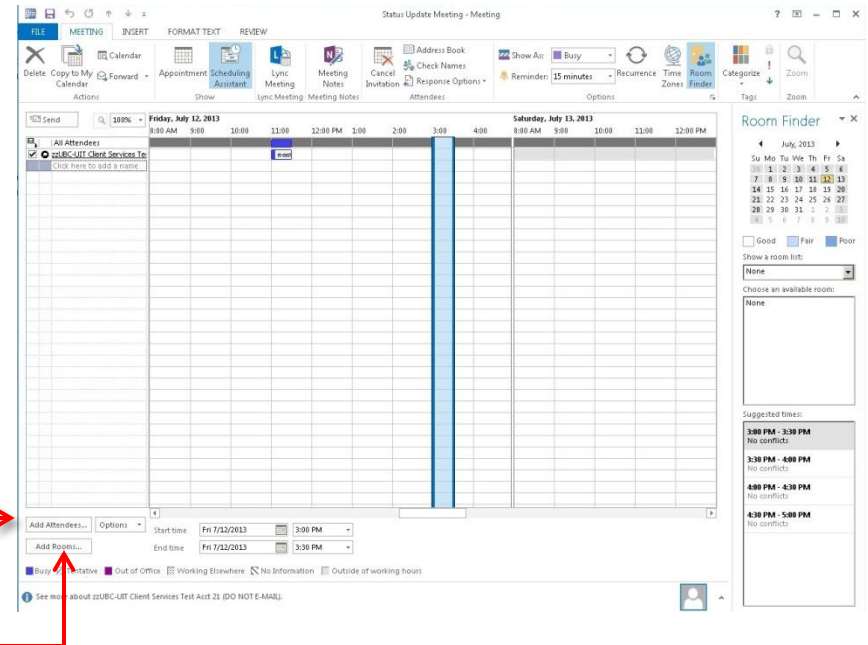
Scheduling a Meeting (3)

Once the Schedule Assistant appears, click on:

"Add Attendees..."* to add FASmail users to your meeting.

"Add Rooms..." to add a FASmail resources to your meeting.

- Examples: Laptops, Rooms, Projectors, etc...



**Non-FASmail attendees may produce unexpected behaviours. Results will vary across different Email service providers.*



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Scheduling a Meeting (4)

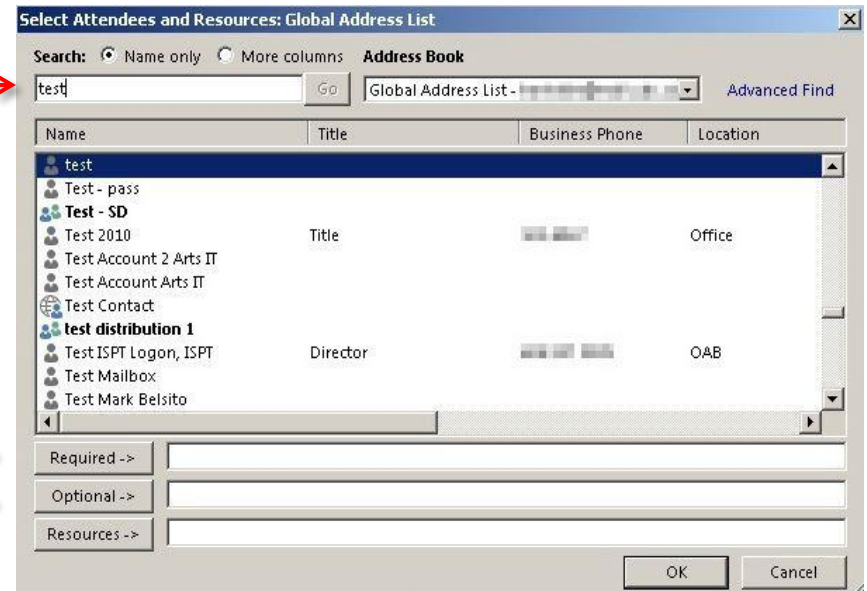
Once you have clicked on “Add Attendees”, the FASmail Global Address List (GAL) of all FASmail users and resources will appear.

Find the FASmail user in the Search field.

Then click on “Required” or “Optional” attendee respectively.

The same process applies for “Add Rooms...”

- Once you have found a resource, click on “Resources” to add it.

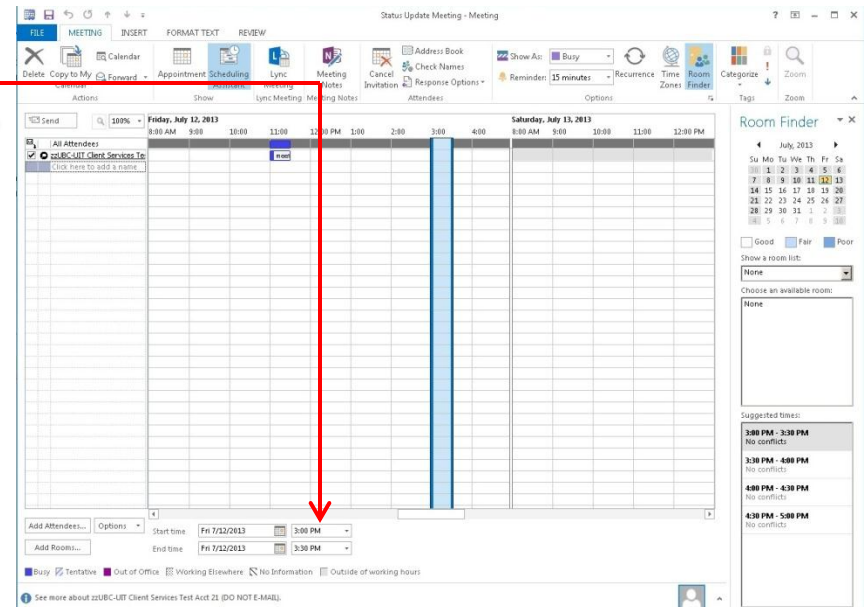


Scheduling a Meeting (5)

Once you have added all of the FASmail users and resources of interest from the GAL, you'll see their availabilities.

You can then pick a time that is available for all users.

Click Send to send the meeting invitation.

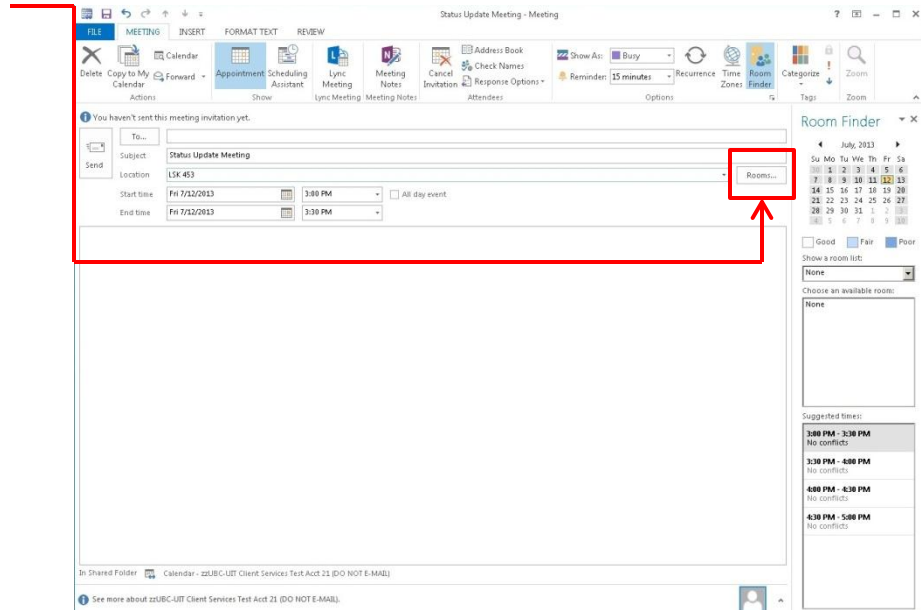


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Details on Booking Resources (1)

In order to book a resource in FASmail, click on "Add Rooms..." from the New Meetings button.



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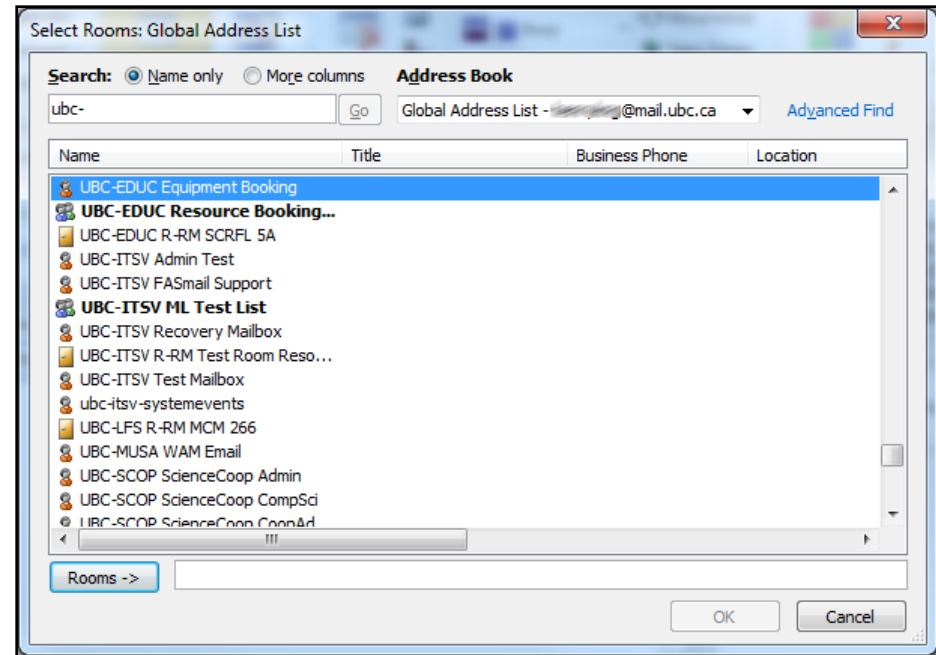
Details on Booking Resources (2)

FASmail resources are categorized into two types:

- Room Resources
- Equipment Resources

Room resources are typically common-space, designated meeting rooms within a department*.

Equipment resources are typically laptops, projectors, etc. within a department.



**Departmental Administrators may choose to lock down resources for use within their own department.*



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Details on Booking Resources (3)

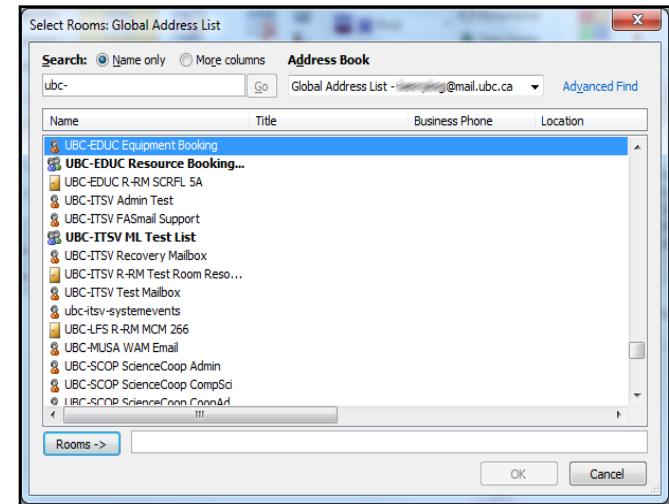
Like booking a FASmail user for a meeting, you can book resources in a similar way.

Room resources take on the convention of:

- [IAM Client Display Name] R-RM [BLDG] Room#
- Ex:UBC IT R-RM LSK 201

This specifies that the room resource belongs to the UBC's Information Technology unit and it's in the Leonard S. Klinck building Room 201.

- [IAM Client Display Name] is the department's common name that was selected as a prefix for all non-user mailboxes.
- [BLDG] is the 3 – 5 character acronym of the building as defined in the UBC Facilities Archibus database.



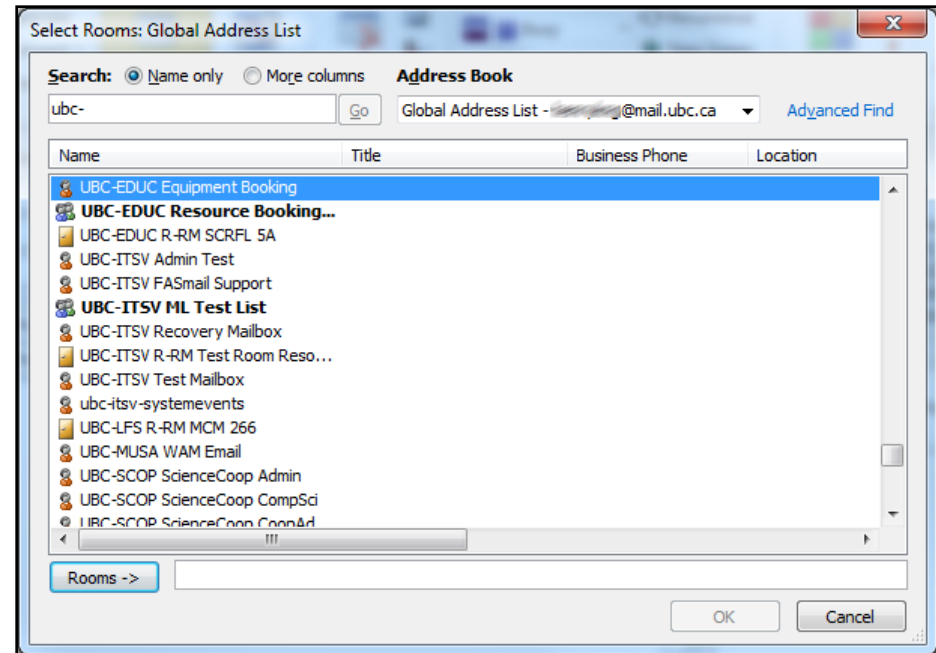
Details on Booking Resources (4)

Similarly, equipment resources take on the convention of:

- [IAM Client Display Name] R-EQ [equipment name]
- Exg:UBC IT R-EQ Laptop1

This specifies that the equipment resource belongs to the UBC's Information Technology unit and it's their loaner laptop 1.

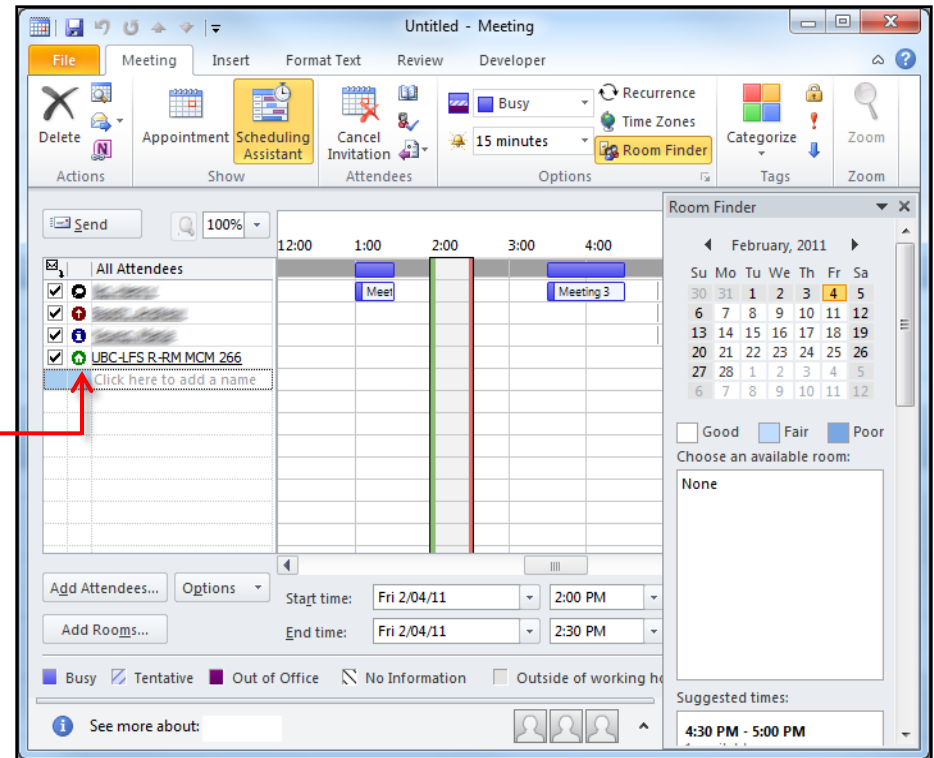
- [IAM Client Display Name] is the department's common name that was selected as a prefix for all non-user mailboxes.



Details on Booking Resources (5)

When you want to book a meeting with people and resources, ensure that they are booked together to ensure that both the attendee and resource are available.

Note: Resources will have a green circle with a "house" in it. If it is not green, then the resource booking may not work.



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Calendar Availability Legend

When you are in the process of scheduling resources or people, there are blocks of colour. These colours represents the states of availabilities.

The information contained here explains what the colours mean.

Busy: The recipient is currently booked and not free at the time slot.

Tentative: The recipient is has accepted your meeting but may not be able to attend if something else arises.

Out of Office: The recipient is not in the office that day.

- Example: Working from home or away.

No Information:

- Outlook not connected to the Internet.
- You are looking at information that is too far ahead.

Outside of working hours: Some recipients have specified their work hours. They may not be able to attend a meeting if it is booked outside of their working hours.

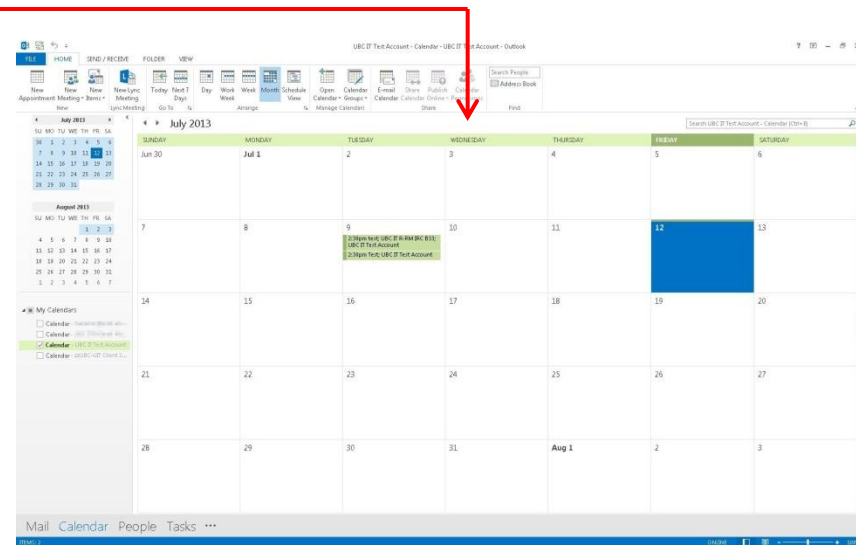
 Busy  Tentative  Out of Office  No Information  Outside of working hours



View a Meeting

You can click on the calendar to view a meeting.

If you see a white, striped bar on the left edge, this indicates that the recipient has not accepted your meeting yet.



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Accept a Meeting Request (1)

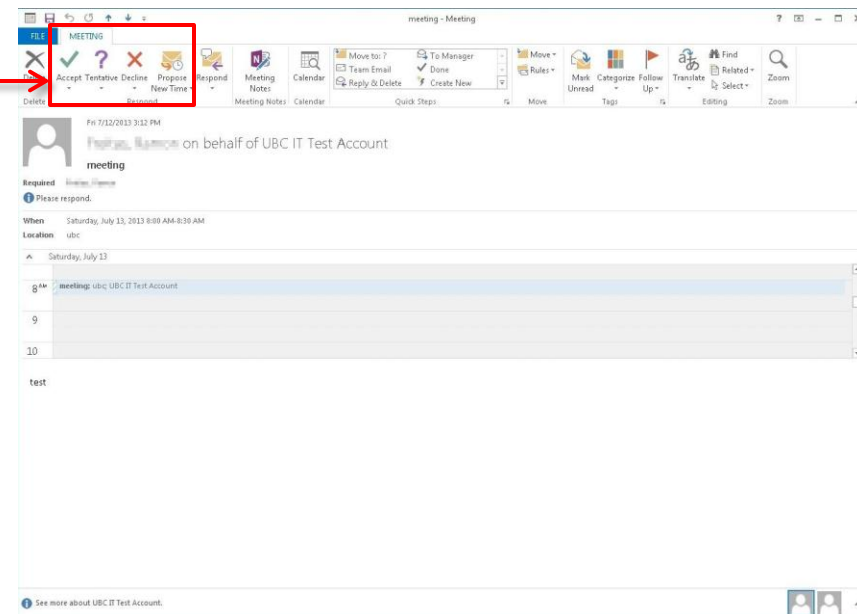
When you open up an Email meeting request, you have a few options:

Accept: Accept the meeting with the proposed date, time, and location.

Tentative: Accept the meeting, but you may not make it if something else comes up.

Decline: You will not attend the meeting.

Propose New Time: Propose a new date, time, and or location to the meeting requestor.



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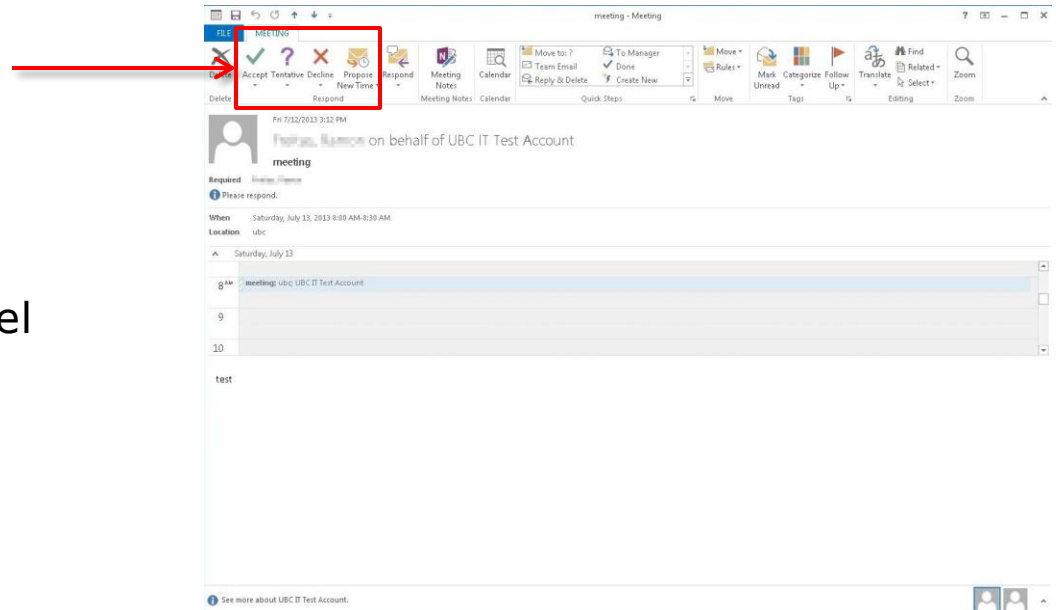
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Accept a Meeting Request (2)

Open up the FASmail meeting invitation.

Click "Accept".

An event will appear in your Outlook's Scheduled Events Panel from the previous slide.



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Meeting Reminders

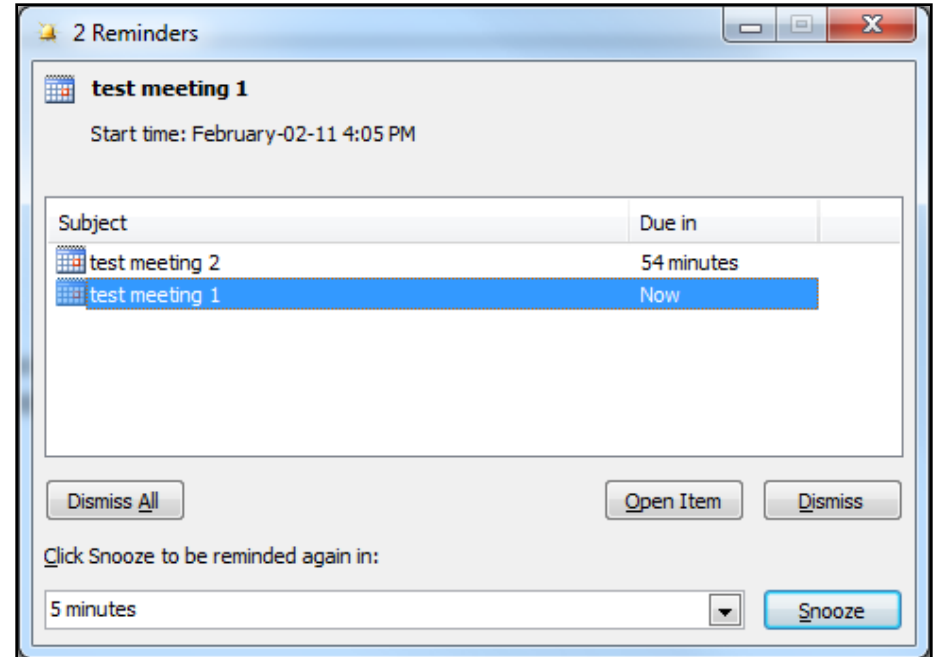
After accepting a meeting, you will get a reminder before the start of the meeting.

Click:

“Snooze” to delay it.

“Open Item” to view the meeting details.

“Dismiss” to remove the reminder.



Benefits of FASmail

Efficiently and easily schedule meetings with other UBC FASmail users

- Simple meeting invitations.
- Propose changes in date, topic, location that all invited attendees receive.
- Informs you of conflicts with other scheduled tasks/events.
- Automatically set reminders through scheduling.
- Book meeting rooms and other resources.
- Fast and reliable.
- Mailbox backups and restores are available for up to a year.
- Available as part of an Email Client or online using the Outlook Web Application.
- Personal and shared calendaring abilities.
- Mobile device integration (BlackBerry/iPhone/etc...)

