

# SETTING UP OUTLOOK

**Information Technology Department**

DIOCESE OF ROCHESTER Created: March 2017



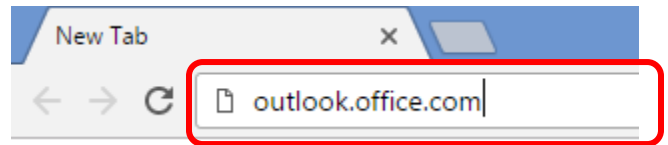
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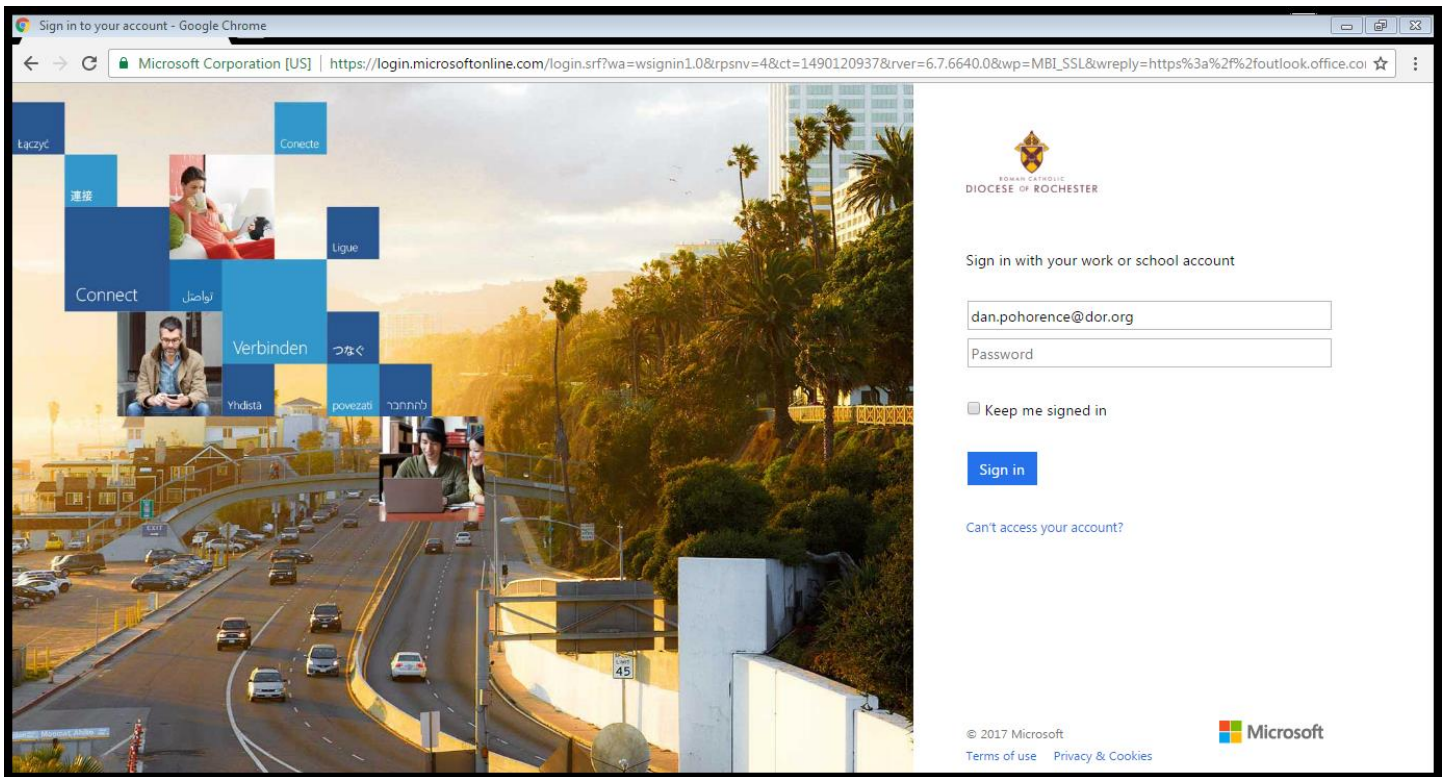
## Getting Started in Outlook 365

To log on to the web version of outlook, open up a web browser (Google Chrome, Internet Explorer, Firefox)

In the address bar, type **outlook.office.com**



The following page will appear in the browser.



Enter in your username and password.

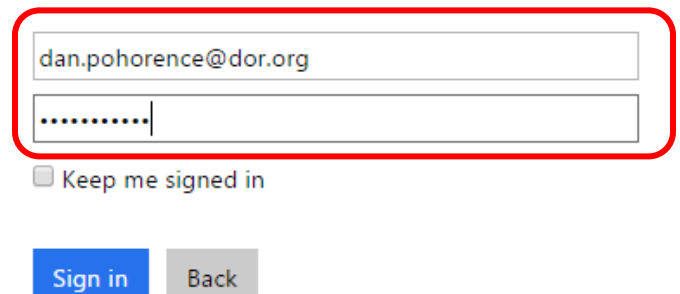
Your username is formatted as **firstname.lastname@dor.org**

Your password is the same password used to log onto the network / computer.

Click  when completed.



Sign in with your work or school account



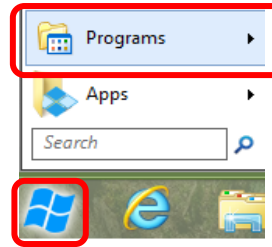
You have now logged onto the web based version of Outlook.

The screenshot displays the Outlook web interface in a Google Chrome browser window. The address bar shows the URL <https://outlook.office.com/owa/>. The page title is "Office 365 Outlook". The interface includes a left-hand navigation pane with "Folders" such as "Inbox", "Sent Items", "Drafts", "Deleted Items", and "Dan Pohorence". The main area shows the "Inbox" with a list of emails, including one from "Dan Pohorence" regarding a calendar sharing request and another from "Mark Darling" with the subject "test three". A large envelope icon is centered in the main area with the text "Select an item to read" and "Click here to always select the first item in the list". On the right, a "Settings" panel is open, showing options for "Automatic replies", "Display settings", "Offline settings", "Manage integrations", "Theme" (set to "Default theme"), and "Notifications" (set to "On"). The top right corner features icons for search, notifications, settings, help, and a user profile.

## Setting up the Client version of Outlook

If you have Outlook installed as part of your office suite, we can synchronize your account information to the client version (Outlook installed onto your computer).

Click on **Start**, then expand your **Programs** menu.

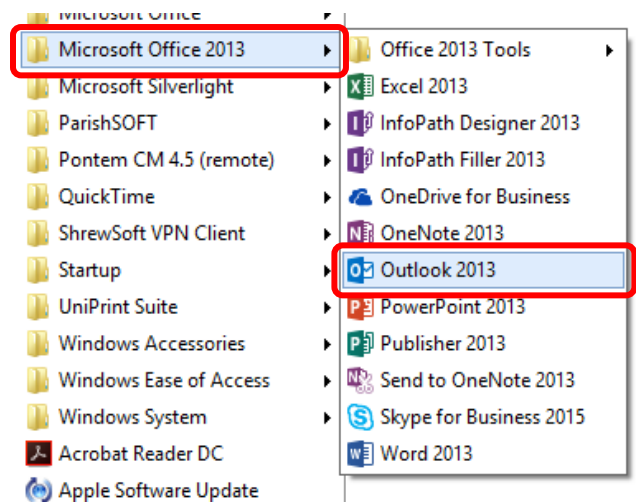


Look for the **Microsoft Office 2013** folder, and select **Outlook 2013**.

*Note: If you use Office 2010 look for the folder named Microsoft Office 2010, and select Outlook 2010.*

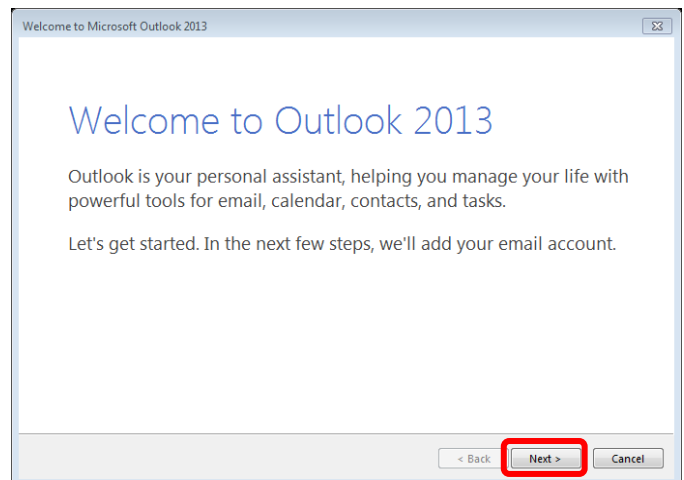
*Note: If you use Office 2016, look for Outlook 2016*

*Note: If you do not have a version of Outlook installed, see instructions for installing Office 2016. (Go to Installing Office 2016 section of handout)*



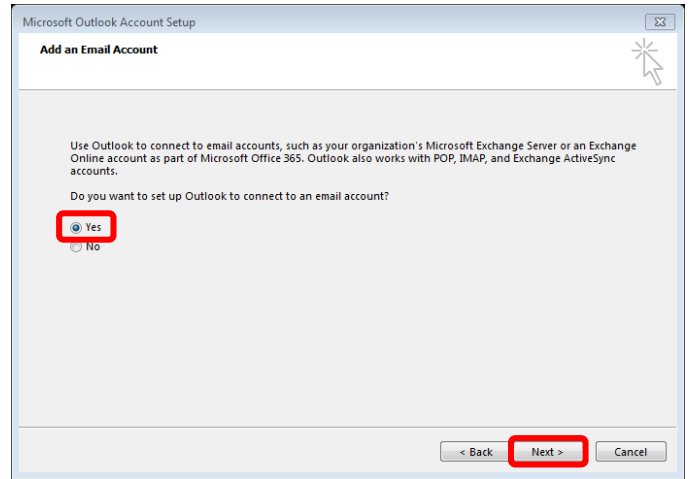
Outlook will open and the setup process will start on this first screen.

Click **Next** to continue.



On the *Microsoft Outlook Account Setup* screen, select **Yes** to the question **Do you want to set up Outlook to connect to an email account?**

Click **Next** to continue.



On the *Add Account* screen, select **E-mail Account**.

Complete the following fields:

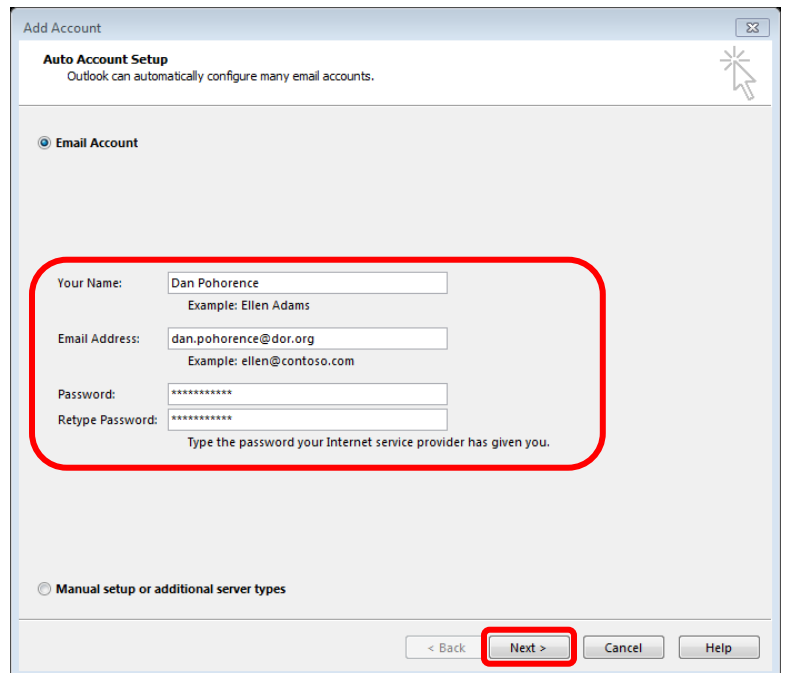
**Your Name** – Type in your first and last name.

**E-Mail Address** – Type in your email address (firstname.lastname@dor.org)

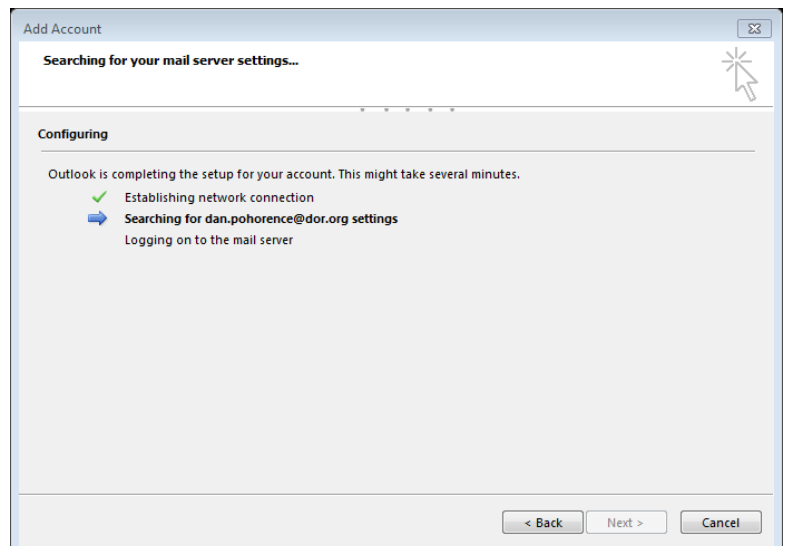
**Password** – Type in your email password to log onto the site outlook.office.com

**Retype Password** – Retype in the password from the previous field.

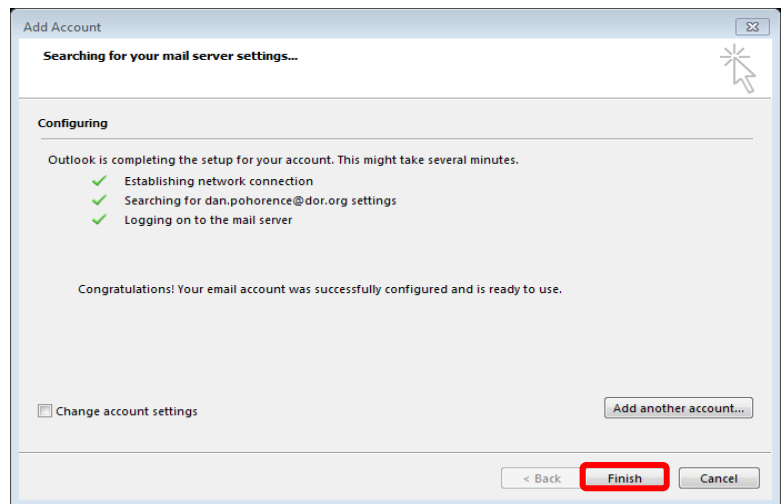
Click **Next** to continue.



The program will automatically configure your account. The process might take a few minutes.



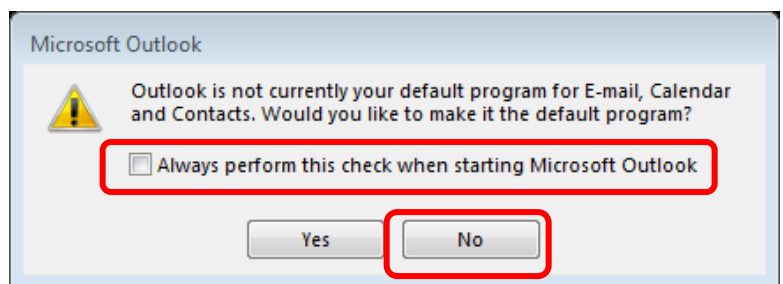
When it has finished configuring and you have received the congratulations message, click **Finish**.



Outlook will open with your current mailbox.

Before opening, you will be asked to make Outlook your default program for E-mail, Calendar, and Contacts.

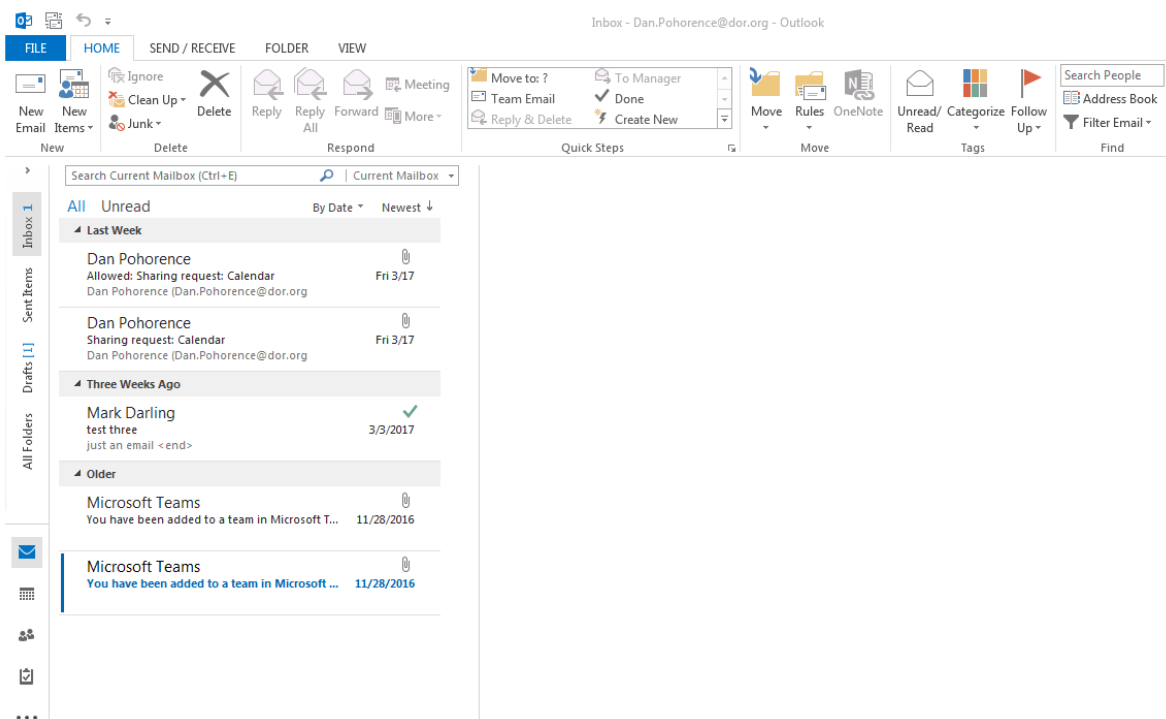
Leave the box checked next to **Always perform this check when starting Microsoft Outlook**.



Click **No** to continue.

When we officially switch to Outlook on the week of May 15<sup>th</sup>, click **Yes** to make Outlook the default program for E-mail.

Outlook has now been configured for your computer.

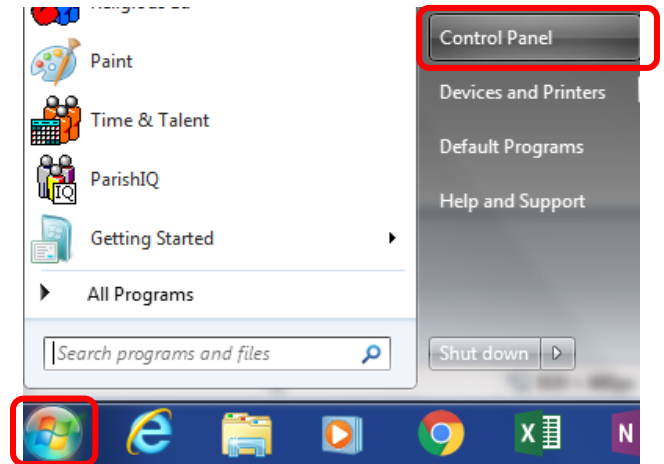




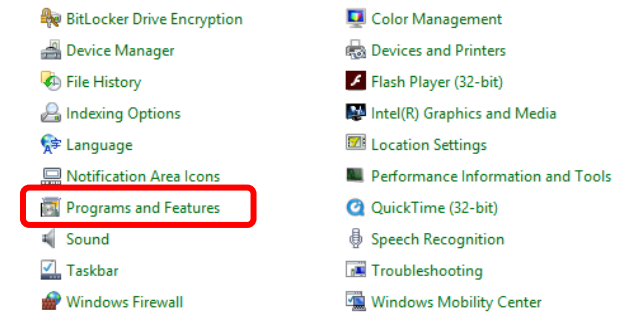
# Installing Office 2016

If you need to install Outlook onto your computer, you will need to complete the following steps to install Office 2016. Before installing Office 2016, you will need to remove your older version of Office from your computer.

On your computer, click on the **Start** button, then click on **Control Panel**.



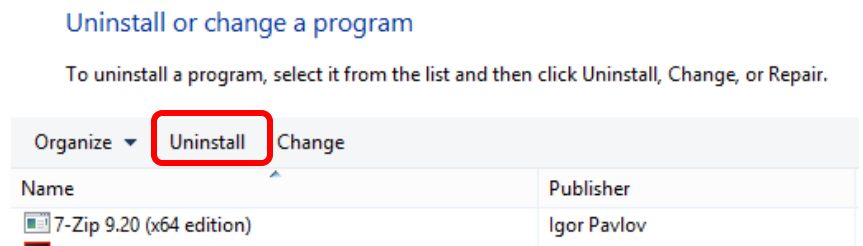
In the **Control Panel**, Click on **Programs and Features**.



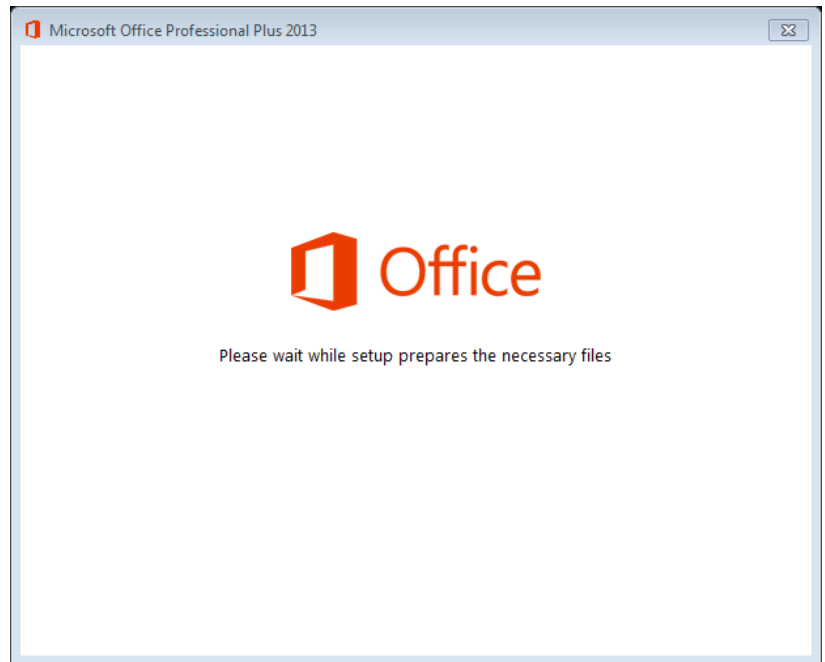
From the list of programs, look for and then single click on **Microsoft Office Professional plus 2010 / 2013**.

Microsoft ASP.NET MVC 2	Microsoft Corporation	2/7/2016	850 KB	2.0.60926.0
Microsoft Office Professional Edition 2003	Microsoft Corporation	4/9/2014	843 MB	11.0.8173.0
<b>Microsoft Office Professional Plus 2013</b>	Microsoft Corporation	3/7/2016		15.0.4569.1506
Microsoft Power Query for Excel	Microsoft Corporation	2/4/2016	159 MB	2.27.4163.242

On the toolbar of the *Uninstall or Change a program* list, click **Uninstall**.



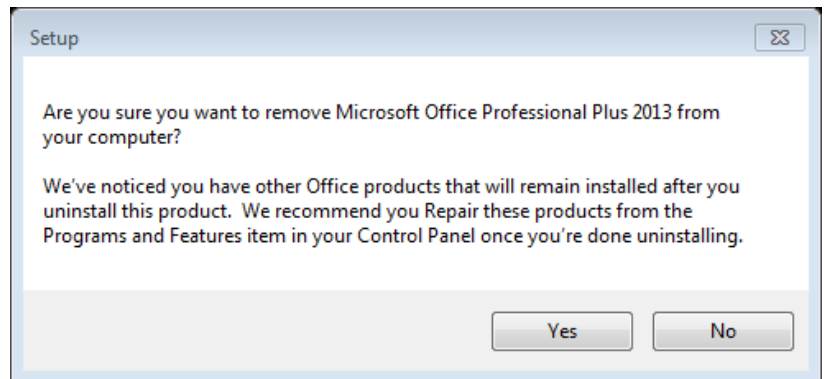
The Microsoft Office Professional Plus 2010 / 2013 uninstall screen will appear.



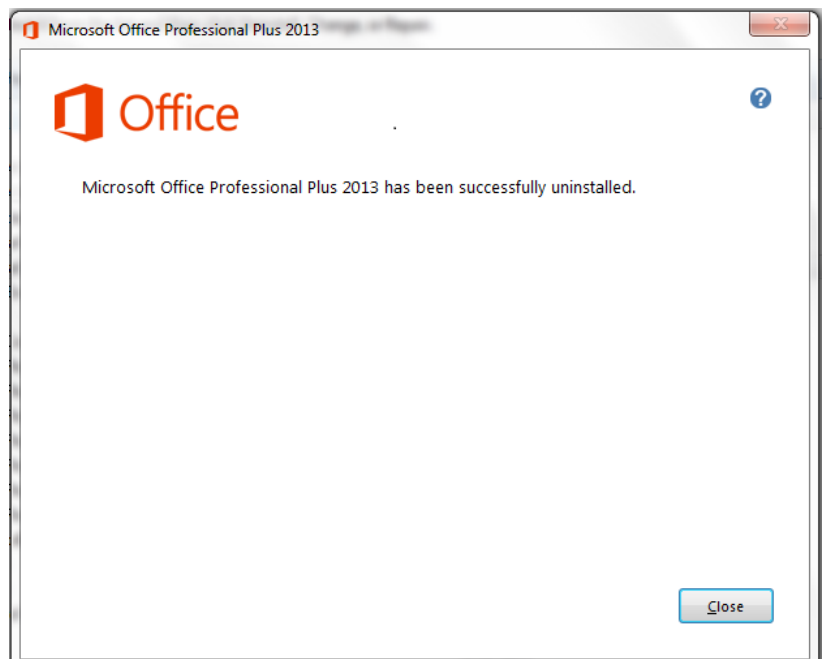
The message asking if ***you want to remove Microsoft Office from your computer*** will appear.

Click **Yes** to remove Office.

The uninstall process will take several minutes.

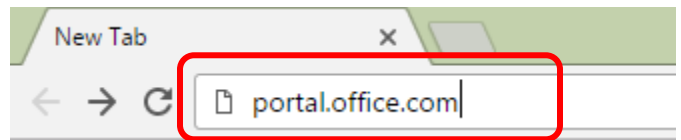


Once Office has been successfully uninstalled, click **Close** on the message window.

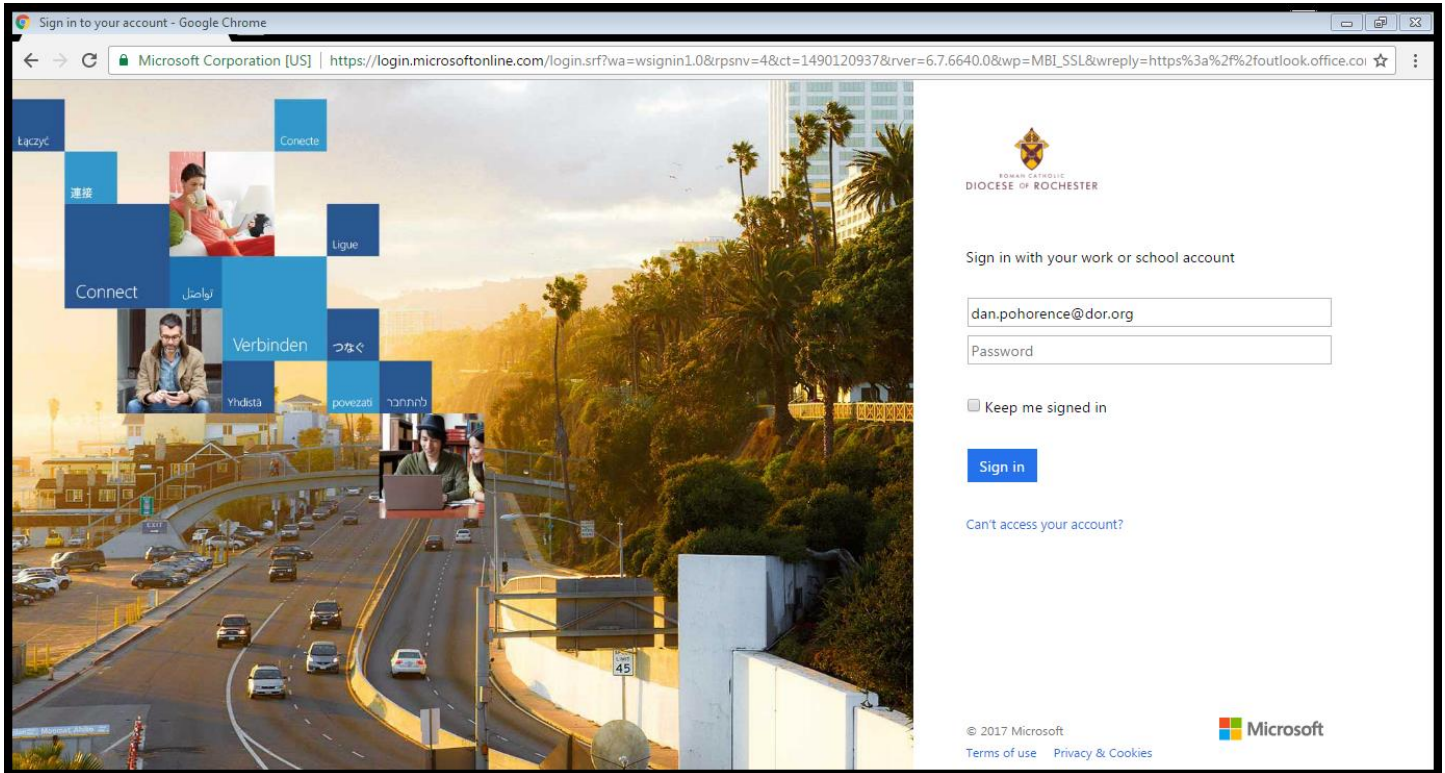


Open up a web browser (Google Chrome, Internet Explorer, Firefox)

In the address bar, type **portal.office.com**



If the following page appears in the browser, you will need to logon to your Office 365 account.



Enter in your **username and password**.

Your username is formatted as ***firstname.lastname@dor.org***



Your password is the same password used to log onto the network / computer.

Click  when completed.

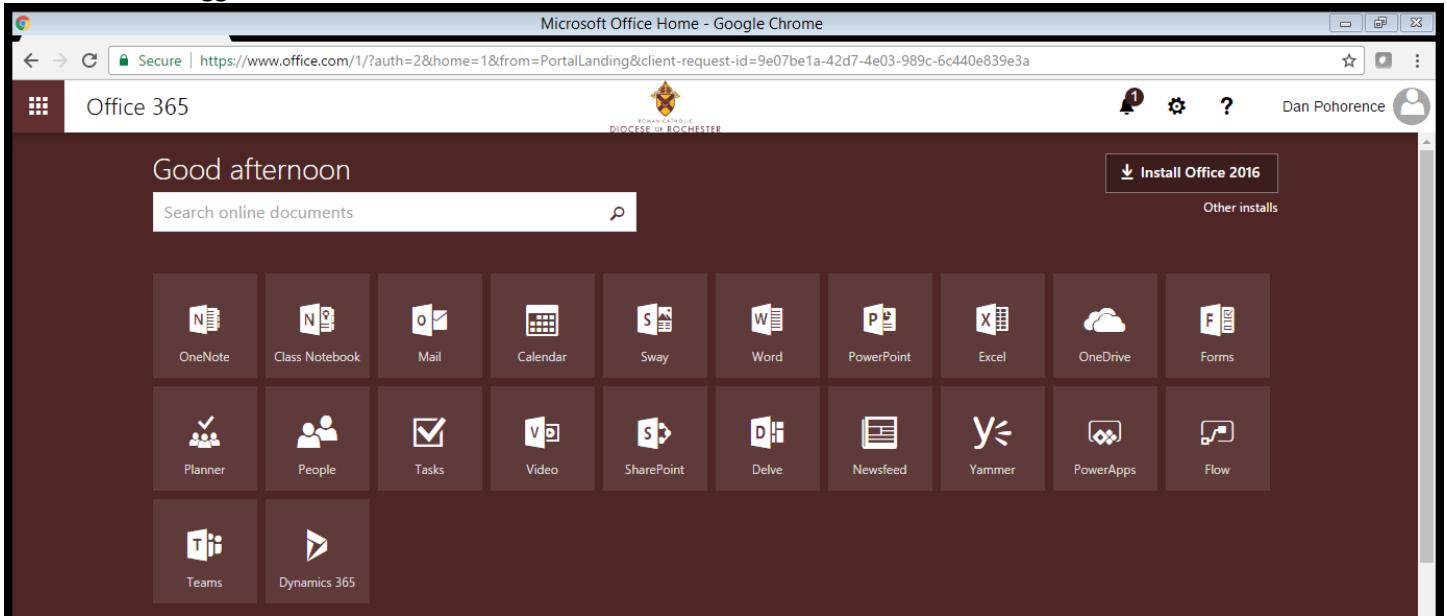


Sign in with your work or school account

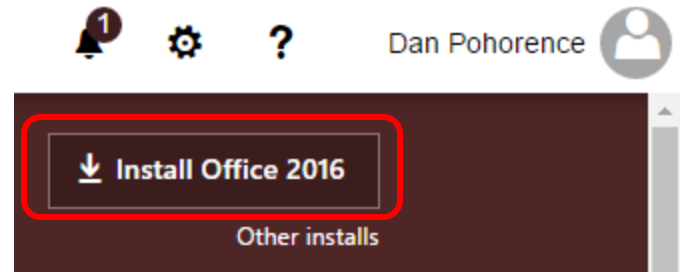
A screenshot of the login form from the previous image. The text input field containing 'dan.pohorence@dor.org' and the password input field with '.....' are highlighted with a red rectangular box. Below the password field is a checkbox for 'Keep me signed in'.

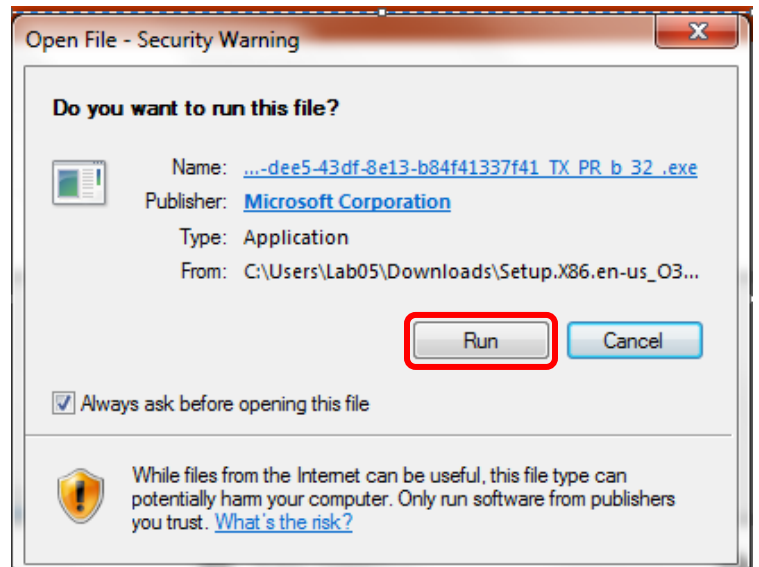
You have now logged onto Office 365.



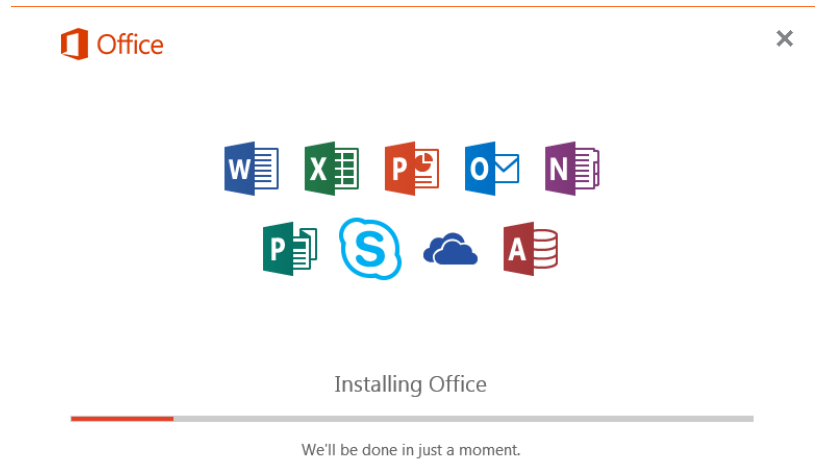
On the upper right corner of the Office 365 screen, click the **Install Office 2016** button.



The Office 2016 installation file will download. Once the file is finished downloading, the File Installation screen will appear, click **Run**.

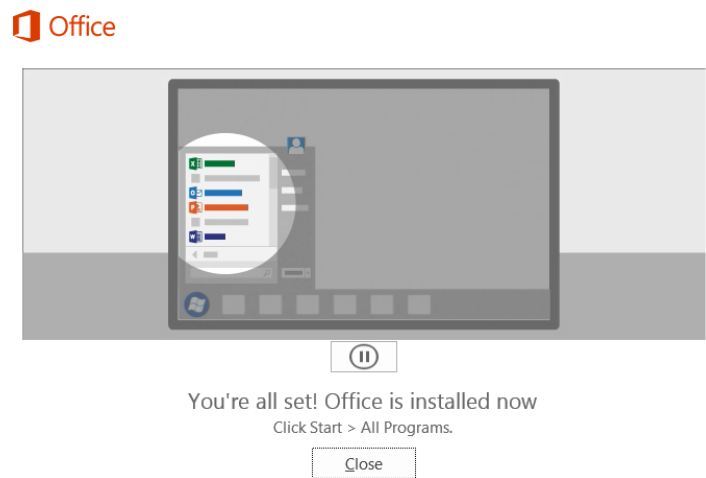


Installation of Office will take several minutes.



You will see the following screen if Office has successfully installed on your computer. Click Close to exit the screen.

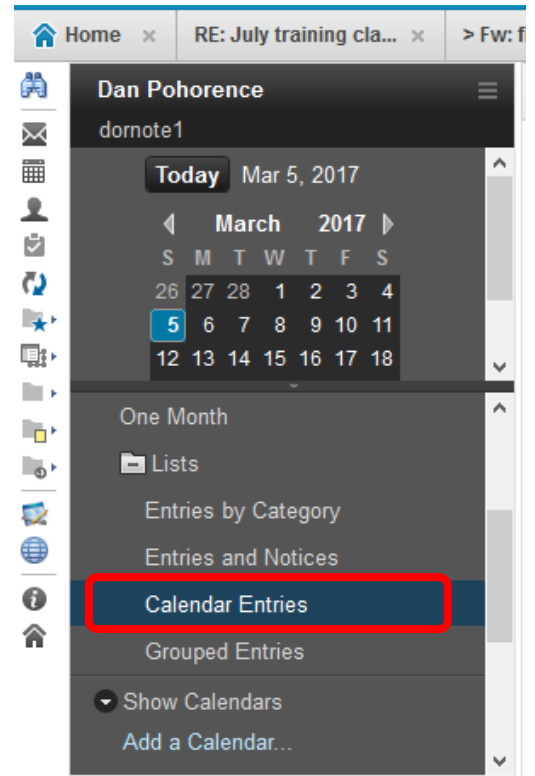
**Follow the instructions on Page 4 to set up your Outlook Account on the computer.**



# Importing your Lotus Notes Calendar to Outlook 365

Logon to your Lotus Notes account and view your calendar.

On the left side of the screen, change the calendar from a grid layout to a list layout by selecting Calendar Entries.



From the list of calendar entries, select the calendar entries you wish to bring forward.

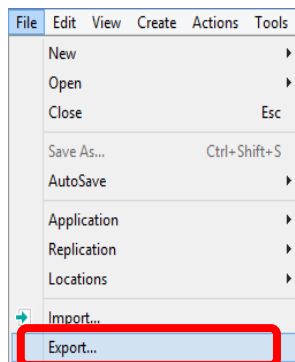
To select all entries, click on the first entry and then press CTRL + A

To only select certain entries: click the first event, hold down the CTRL key and continue clicking the events you wish to bring forward.

New	Participant Actions	Copy Into New	More	Search	Show
<input checked="" type="checkbox"/>					
<input checked="" type="checkbox"/>					
<input checked="" type="checkbox"/>					
<input checked="" type="checkbox"/>					
<input checked="" type="checkbox"/>					
<input checked="" type="checkbox"/>					
<input checked="" type="checkbox"/>					

***If you have recurring events, only select one of the dates the event recurs. When imported into the outlook calendar the event will show as a recurring event.***

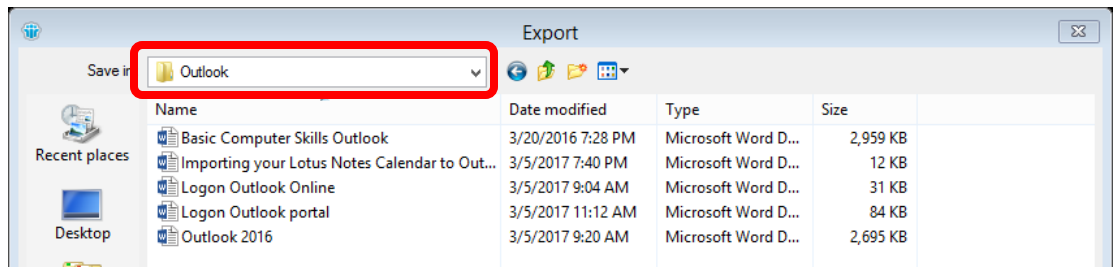
On the main toolbar, click File, then select Export.



The export screen will appear. This will create an export file containing your calendar entries.

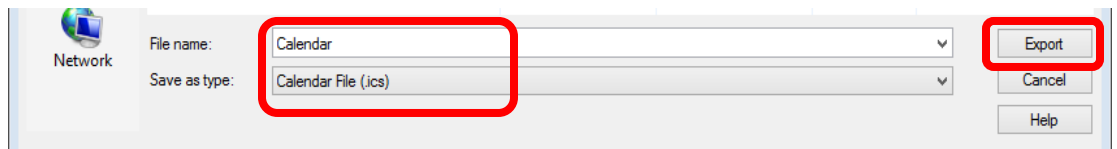
Select the location you wish to save the export file to.

(i.e. My Documents or Desktop)



Type in a File Name.

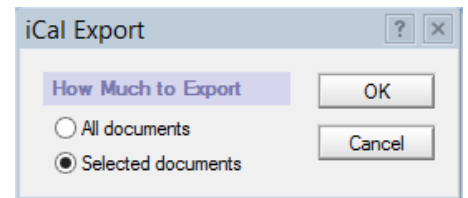
Change Save as type to Calendar File (.ics)



Click Export

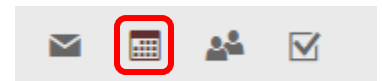
The iCal Export screen will ask if you want to export All Documents (if you selected all entries) or Selected Documents (if you selected particular documents).

Click OK

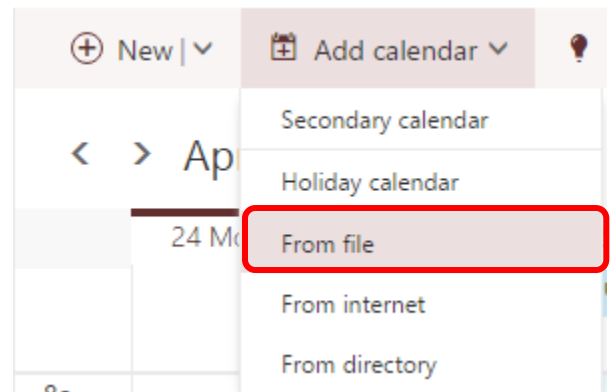


Now you are ready to import your calendar entries into Outlook 365.

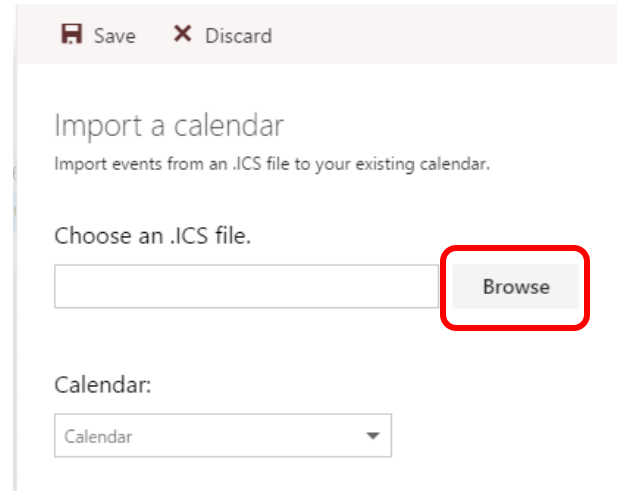
Logon to Outlook. Go to your calendar by clicking on the calendar icon located at the bottom left sidebar.



On the toolbar, click on drop down arrow next to Add calendar, then click on From file.



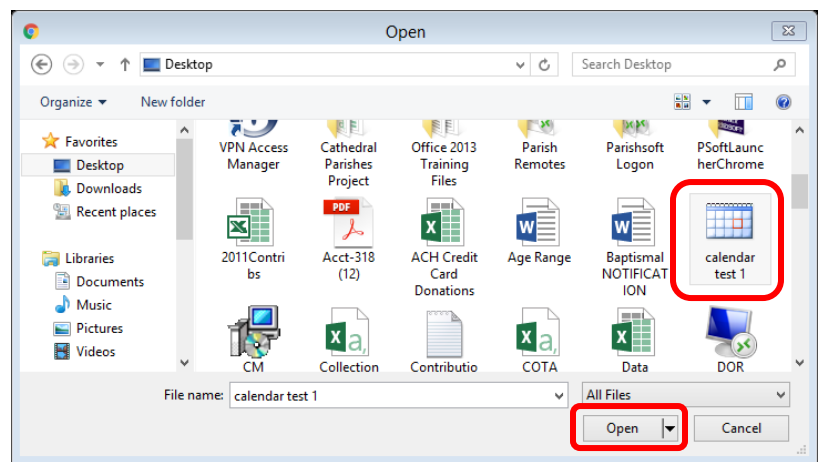
On the Import a calendar screen, click Browse to search for the exported Lotus Notes calendar file.



The Open window will appear, locate the saved calendar file.

Click on the file.

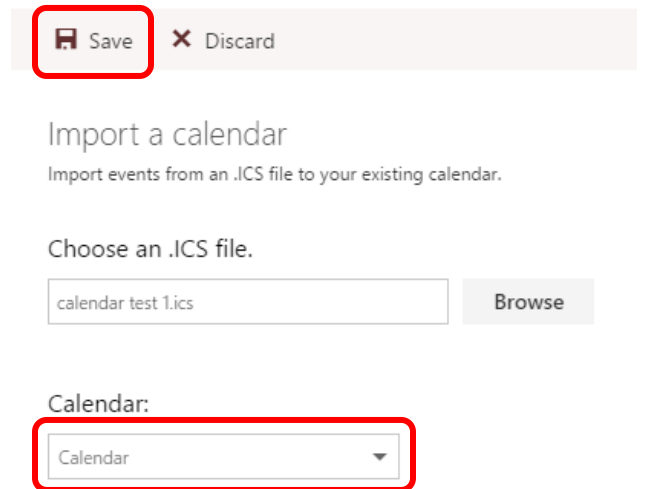
Click Open.



Your selected calendar file will appear.

Select the calendar you wish to add the events to.

Click Save when done.





Your imported events will now appear on your calendar.

Office 365 Outlook

Search Calendar | New | Add calendar | Interesting calendars | Share | Print

April 2017

S	M	T	W	T	F	S
26	27	28	29	30	31	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	1	2	3	4	5	6

Your calendars

- Calendar
- United States holi
- Birthdays

Other calendars

People's calendars

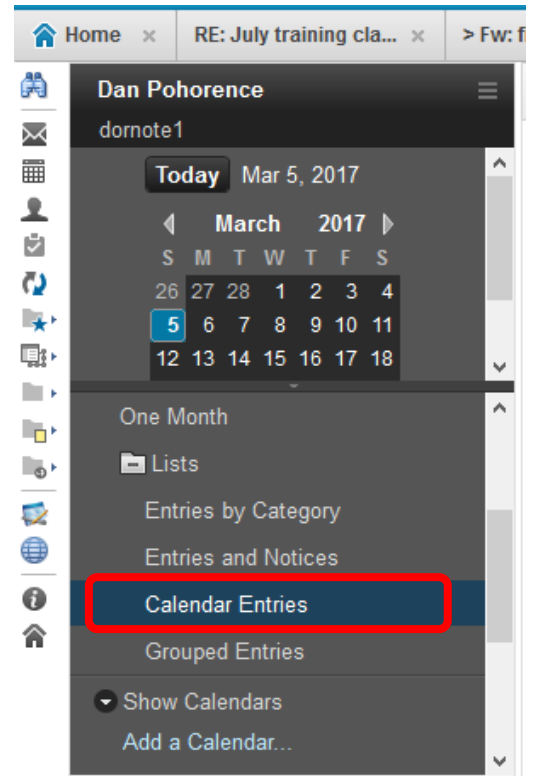
Groups

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
26	27 9a	28	29	30	31	Apr 1
2	3	4	5	6 9a Office Training	7	8
9	10 9a Staff Meeting	11	12	13	14 Out Of Office	15
16	17	18	19	20	21	22
Out Of Office						
23	24 3p Outlook Trani	25 Outlook Training	26 Outlook Training	27 8:30a Outlook Tr	28 9:30a Outlook Tr	29
Out Of Office						
30	May 1	2	3	4	5	6
Outlook Training						
8a Outlook Trani						
8:30a Outlook Tr						
8:30a Appointme						

# Exporting Calendar Entries from Lotus Notes to Outlook (Client Version)

Logon to your Lotus Notes account and view your calendar.

On the left side of the screen, change the calendar from a grid layout to a list layout by selecting **Calendar Entries**.



From the list of calendar entries, select the calendar entries you wish to bring forward.

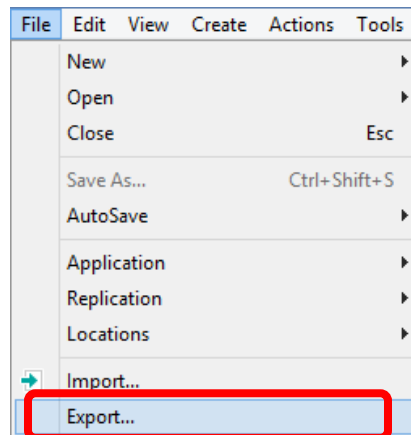
To select all entries, click on the first entry and then press **CTRL + A**

To only select certain entries: click the first event, hold down the **CTRL** key and continue clicking the events you wish to bring forward.

New ▾	Participant Actions ▾	Copy Into New ▾	More ▾	Q ▾	Show ▾
Meeting Time ▾	Subject	Chair	Last Modified	Entry Type	
<input checked="" type="checkbox"/>	03/07/2017 09:00 AM	Accepted: Office 365 Meeting	David Kilpatrick	03/03/2017 07:48 PM	Meetings
<input type="checkbox"/>	03/04/2017	Out Of Office		03/05/2017 08:34 AM	All Day Events
<input checked="" type="checkbox"/>	03/01/2017 09:00 AM	ConnectNow Training @ Mother of Sorrows	Dan Pohorence	01/27/2017 08:58 AM	Meetings
<input checked="" type="checkbox"/>	02/10/2017 10:00 AM	Accepted: Pontem Mapping	Ray LeChase	02/03/2017 06:17 PM	Meetings
<input type="checkbox"/>	01/30/2017	Out Of Office		01/30/2017 10:35 PM	All Day Events
<input type="checkbox"/>	01/30/2017	Out Of Office		02/01/2017 06:52 AM	All Day Events
<input checked="" type="checkbox"/>	01/13/2017 10:00 AM	Accepted: Dan Pohorence /Tom V - Meet on Clyde's Cemetery Data	Thomas Veeder	01/10/2017 04:09 PM	Meetings
<input type="checkbox"/>	12/30/2016	Out Of Office		12/29/2016 04:07 PM	All Day Events
<input checked="" type="checkbox"/>	12/22/2016 09:00 AM	Accepted: ParishSoft Training	Timothy Reetz	12/08/2016 09:49 AM	Meetings
<input checked="" type="checkbox"/>	12/13/2016 09:00 AM	Accepted: Staff Meeting	David Kilpatrick	12/01/2016 11:12 PM	Meetings

If you have recurring events, only select one of the recurrent entries.

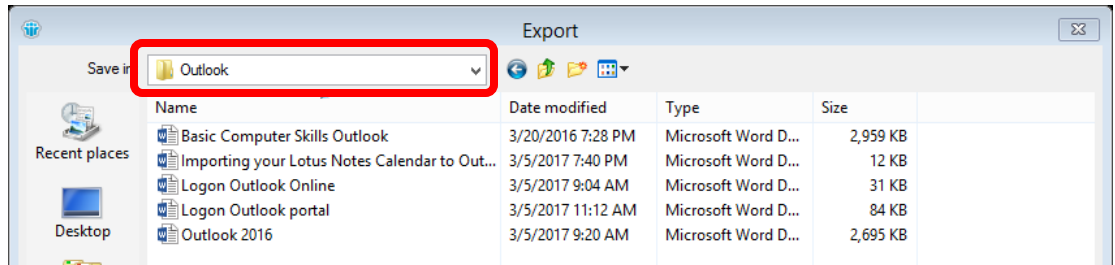
On the main toolbar, click **File**, then select **Export**.



The export screen will appear. This will create an export file containing your calendar entries.

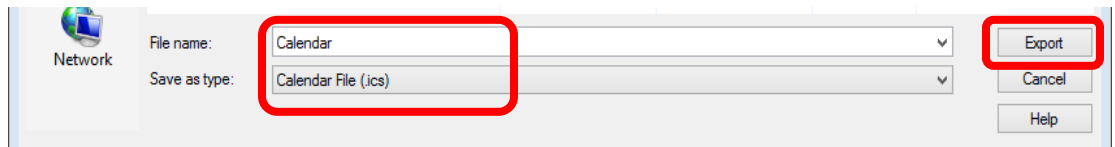
Select the location you wish to save the export file to.

(i.e. My Documents or Desktop)



Type in a **File Name**.

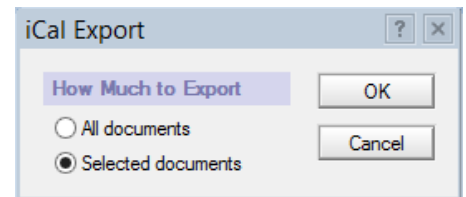
Change Save as type to **Calendar File (.ics)**



Click **Export**

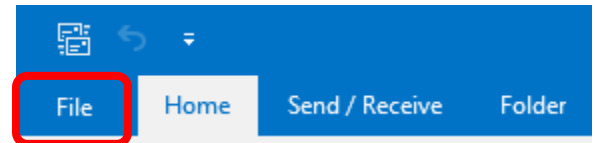
The iCal Export screen will ask if you want to export **All Documents** (if you selected all entries) or **Selected Documents** (if you selected documents).

Click **OK**

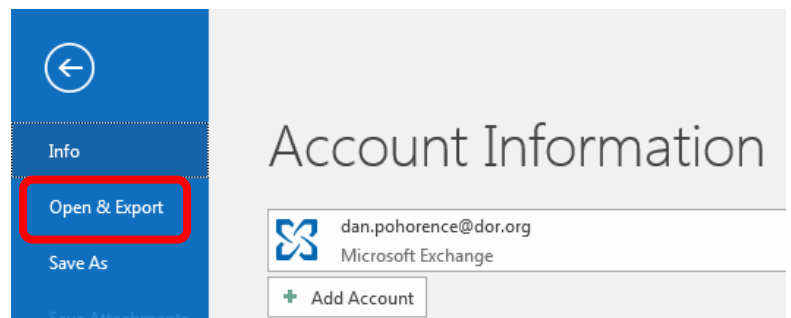


Now you are ready to import your calendar entries into Outlook.

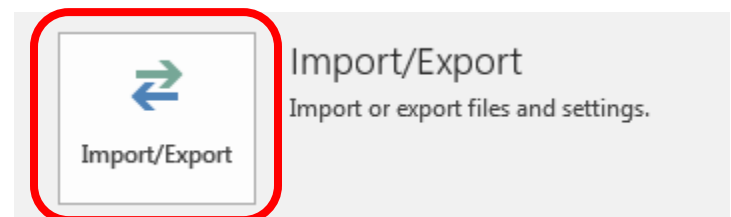
Logon to Outlook. On the toolbar, click on **File**.



Click on **Open & Export**

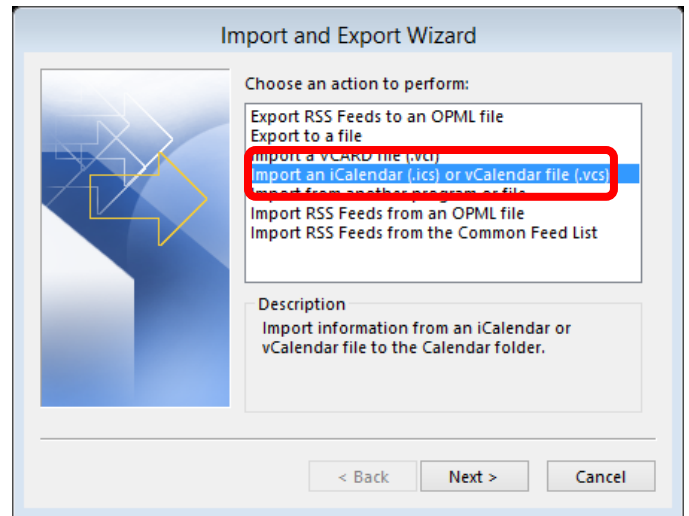


Click on **Import / Export**



The Import and Export Wizard will appear. Under Choose an action to perform, select Import from another program or file.

Click **Next**

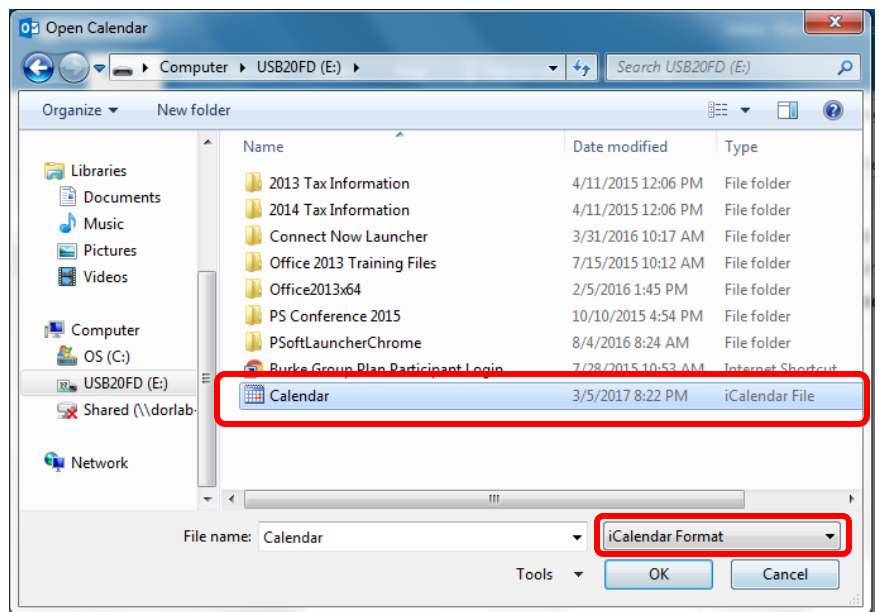


The Browse window will appear, locate the saved calendar file.

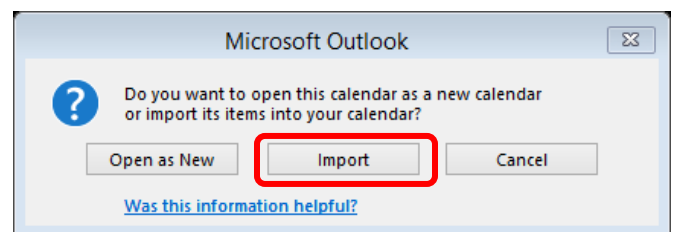
Click on the file.

Verify iCalendar Format is selected as file type.

Click OK.



Import the items into your calendar.



When the calendar file finishes importing the data all your selected Lotus Notes calendar entries will appear.

The screenshot shows the Outlook calendar interface for Dan.Pohorence@dor.org. The main calendar view is for March 2017, with a detailed view of the week from Sunday, Feb 26 to Saturday, Mar 4. The calendar shows several imported entries:

- Mar 1:** 9:00am ConnectNow Training @ Mother of Sorrows; Mother of Sorrows Parish Office
- Mar 7:** 9:00am Office 365 Meeting
- Mar 14:** Test Meeting
- Mar 17:** 8:00am Meeting
- Mar 20:** 10:00am Meeting with HEART group; 2nd Floor Conference Room
- Mar 23:** 9:00am Office Training; Webex - My Desk
- Mar 27:** 9:00am Team Meeting; Dan Pohorence

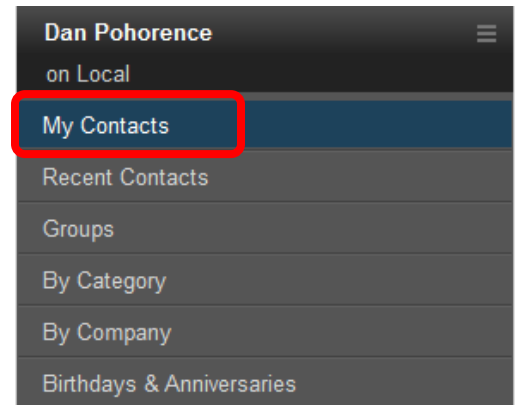
The interface includes a navigation pane on the left with a calendar overview for March and April 2017, and a list of calendars under 'My Calendars' (Calendar, United States holidays, Birthdays) and 'Other Calendars'. The top ribbon shows various calendar actions like 'New Appointment', 'New Meeting', and 'Share Calendar'. The bottom status bar indicates 'ITEMS: 7', 'ALL FOLDERS ARE UP TO DATE', and 'CONNECTED TO: MICROSOFT EXCHANGE'.

# Importing your Lotus Notes Contacts to Outlook 365

Logon to your Lotus Notes account and open your contacts.



On the left side of the screen, verify that My Contacts is selected.



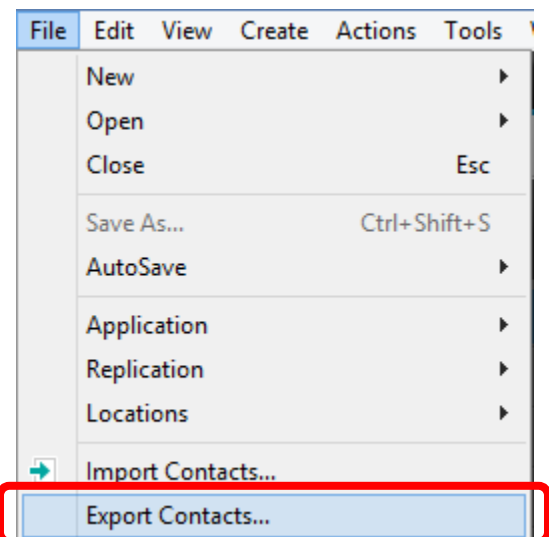
From the list of your contacts, select the contacts you wish to bring into Outlook.

To select all entries, click on the first entry and then press CTRL + A

To only select certain entries: click the first event, hold down the CTRL key and continue clicking the events you wish to bring forward.

	Name	E-mail	Phone	Company	Modified	Category
All	Barth, Trisha	Trisha Barth <tbarth@parishsoft.com>	Business: 866-930-4774 x119 Fax: 734-205-1011	Parishsoft	03/07/2017	
A-B	Dickinson, Bob	Bob Dickinson <bdickinson@parishsoft.com>			03/06/2017	
C-D	Miklosovic, John	John Miklosovic <jmiklosovic@parishsoft.com>			01/12/2016	
E-F	Support, ParishSOFT	"Joseph Adams (ParishSOFT Support)" <support@parishsoft.com>			01/14/2016	
G-H	Tank, Elaine	Elaine Tank <etank@parishsoft.com>	Business: 866-930-4774 x641 Fax: 734-205-1011	Parishsoft	03/13/2017	
I-J	Zettel, Ted	Ted Zettel <tzettel@parishsoft.com>			03/06/2017	
K-L						
M-N						
O-P						
Q-R						
S-T						

On the main toolbar, click File, then select Export.

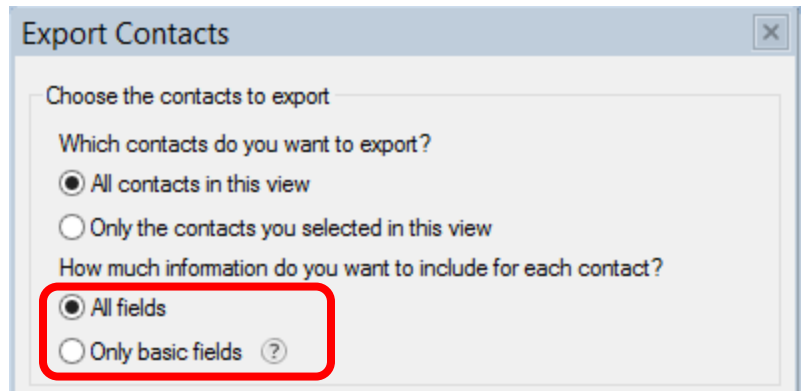


The Export Contacts screen will appear. This will create an export file containing your contacts.

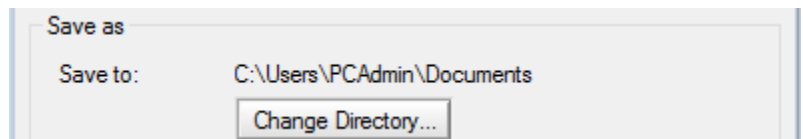
Verify that you wish only to exports all the contacts or the contacts your selected.

You are also asked if you want to include all the fields associated with the contacts or only the basic fields.

**\*\*\* Note: Selecting only basic fields ONLY imports your contacts: Name, primary e-mail address, phone numbers, company, and category. \*\*\***



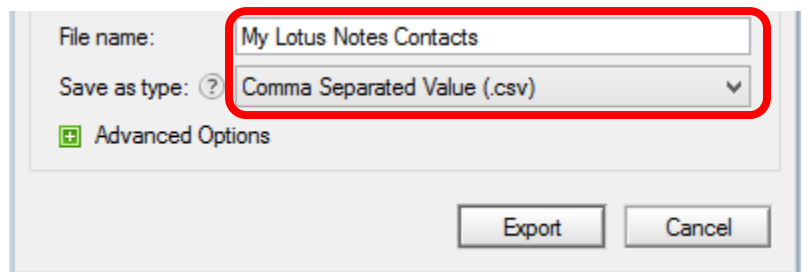
Select the location you wish to save the export file to. (i.e. My Documents or Desktop)



Type in a File Name.

Change Save as type to Comma Separated Value (.csv)

Click Export



Open the exported contacts file.

Locate the following columns: **Internet Address, Business Mail 2, and Personal Mail**. Rename these columns to **E-mail, E-mail 2, and E-mail 3**.

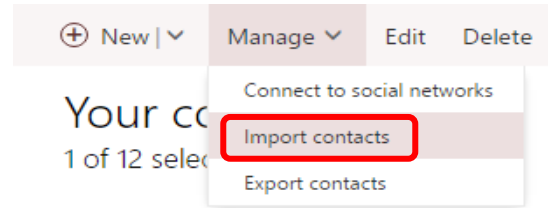
	AM	AN	AO	AP	AQ	AR	AS	AT	AU	AV	AW
1	Assistant's Birthday	Category	Children	Directory	Business Address	E-mail	E-mail 2	Assistant's E-mail 3	Personal Mail		
2					Elaine Tank <etank@parishsoft.com>	etank@parishsoft.com	Test@dor.org	test@dor.org			
3						Test@email.com	Test@email.com	test@email.com			
4											

Now you are ready to import your contact entries into Outlook.

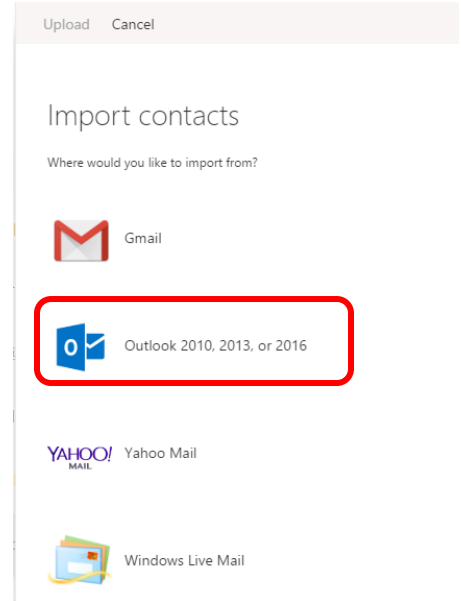
Logon to Outlook 365. On the bottom left sidebar, click on the contacts icon.



On the toolbar, expand the Manage menu by clicking on the drop down arrow. Click **Import Contacts**.



When the Import Contacts menu appears, click on **Outlook 2010, 2013, or 2016**.



Click **Browse** to search for the contacts file from lotus notes. When you have selected the file, click on **Upload**.

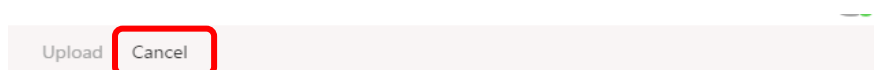


## Import contacts from Outlook 2010, 2013, or 2016

1. In Outlook, select File > Options> Advanced.
2. In the Export section, select Export.
3. In the Import and Export wizard, choose Export to a file, and then select Next.
4. Under Create a file of type, choose Comma Separated Values.
5. Under Select the folder to export from, select the contact folder you want to export, and then select Next.
6. Under Save exported file as, choose a location to save to, select OK, and then select Next.
7. Select Finish. When the Import and Export Progress box disappears, your export is complete.
8. Check to make sure the CSV file you just downloaded isn't empty by opening the file.
9. On this page, browse to the location of the file you just downloaded and select it.
10. Select Upload.



If the contacts were imported successfully, click cancel to exit screen and to return to the contact list.



## Import successful

Your contacts were successfully imported from "notes contact.csv" into your contact list.Total contacts imported: 2

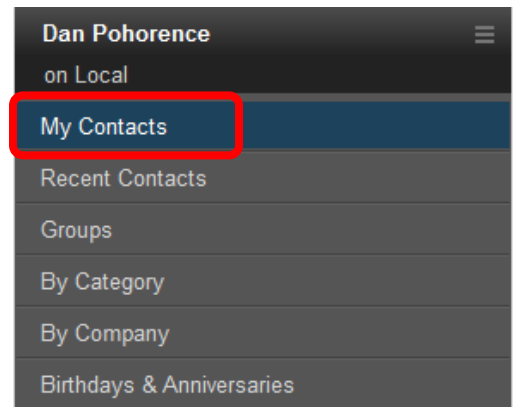


## Exporting Contacts from Lotus Notes to Outlook (Client Version)

Logon to your Lotus Notes account and open your contacts.



On the left side of the screen, verify that **My Contacts** is selected.



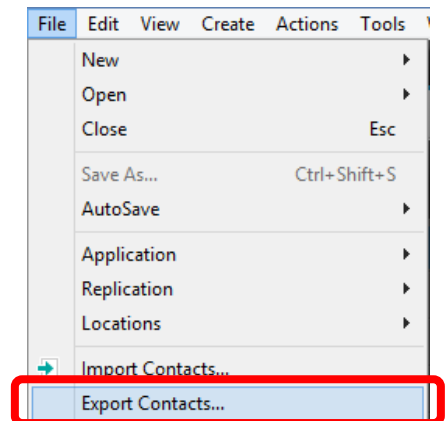
From the list of your contacts, select the contacts you wish to bring into Outlook.

To select all entries, click on the first entry and then press **CTRL + A**

To only select certain entries: click the first event, hold down the **CTRL** key and continue clicking the events you wish to bring forward.

	Name	E-mail	Phone	Company	Modified	Category
All	Barth, Trisha	Trisha Barth <tbarth@parishsoft.com>	Business: 866-930-4774 x119 Fax: 734-205-1011	Parishsoft	03/07/2017	
A-B	Dickinson, Bob	Bob Dickinson <bdickinson@parishsoft.com>			03/06/2017	
C-D	Miklosovic, John	John Miklosovic <jmiklosovic@parishsoft.com>			01/12/2016	
E-F	Support, ParishSOFT	"Joseph Adams (ParishSOFT Support)" <support@parishsoft.com>			01/14/2016	
G-H	Tank, Elaine	Elaine Tank <etank@parishsoft.com>	Business: 866-930-4774 x641 Fax: 734-205-1011	Parishsoft	03/13/2017	
I-J	Zettel, Ted	Ted Zettel <tzettel@parishsoft.com>			03/06/2017	
K-L						
M-N						
O-P						
Q-R						
S-T						

On the main toolbar, click **File**, then select **Export**.

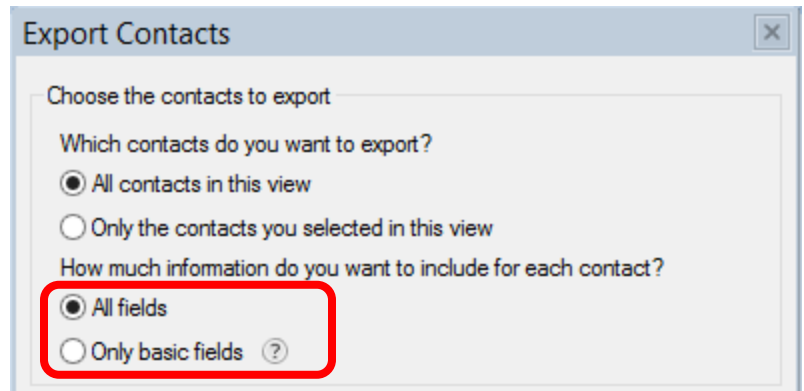


The Export Contacts screen will appear. This will create an export file containing your contacts.

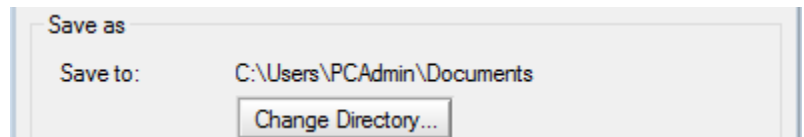
Verify that you wish only to exports all the contacts or the contacts your selected.

You are also asked if you want to include all the fields associated with the contacts or only the basic fields.

**\*\*\* Note: Selecting only basic fields ONLY imports your contacts: Name, primary e-mail address, phone numbers, company, and category. \*\*\***



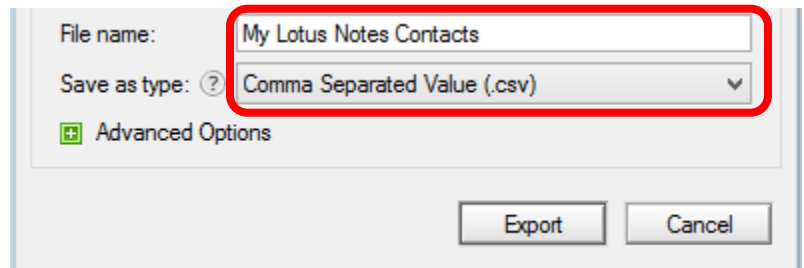
Select the location you wish to save the export file to. (i.e. My Documents or Desktop)



Type in a File Name.

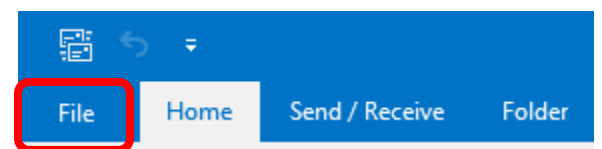
Change Save as type to **Comma Separated Value (.csv)**

Click **Export**

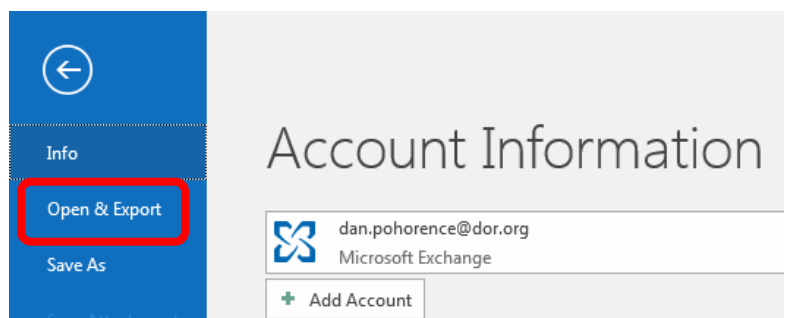


Now you are ready to import your contact entries into Outlook.

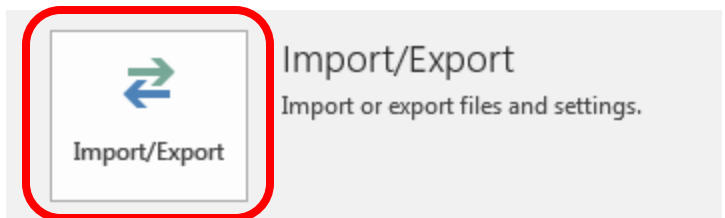
Logon to Outlook. On the toolbar, click on **File**.



Click on **Open & Export**

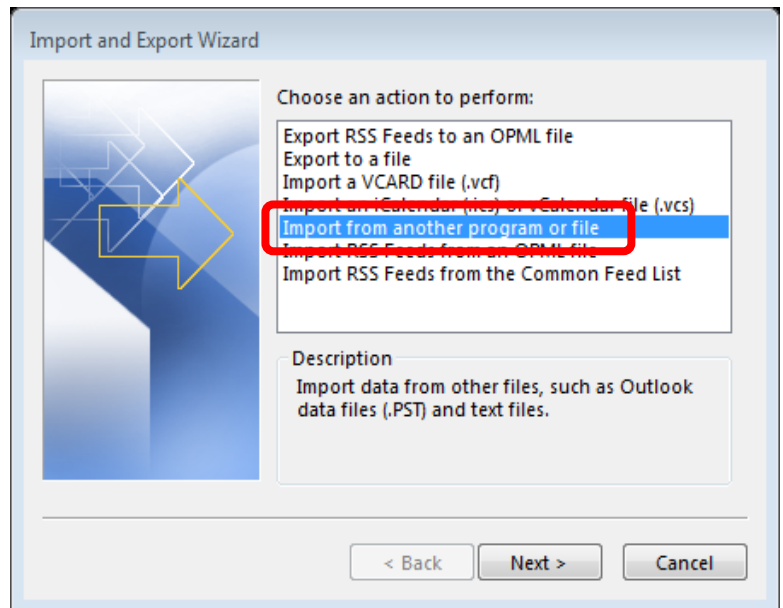


Click on **Import / Export**



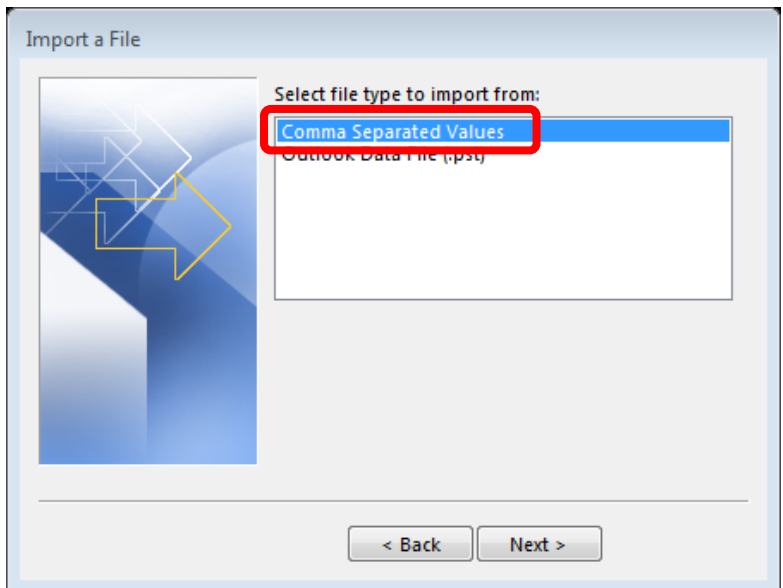
The Import and Export Wizard will appear. Under Choose an action to perform, select **Import from another program or file**.

Click **Next**

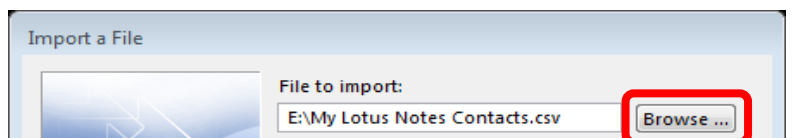


Under Select file type to import from: select **Comma Separated Values**.

Click **Next**

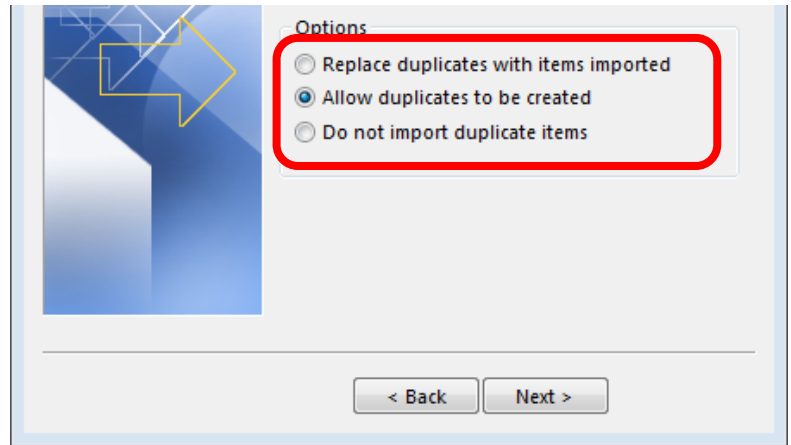


Browse for your saved contacts file.



Under Options, select whether you want to **Allow Duplicates to be Created** or **Do Not Import Duplicate Items**.

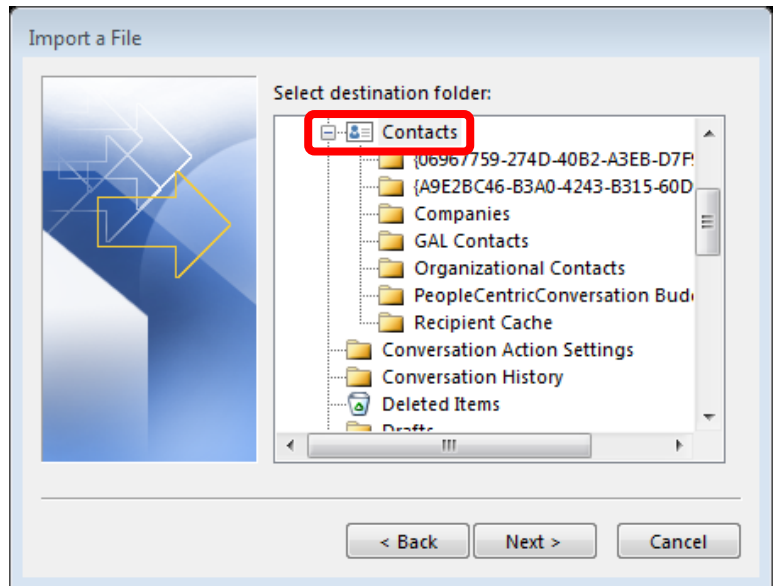
Click **Next**



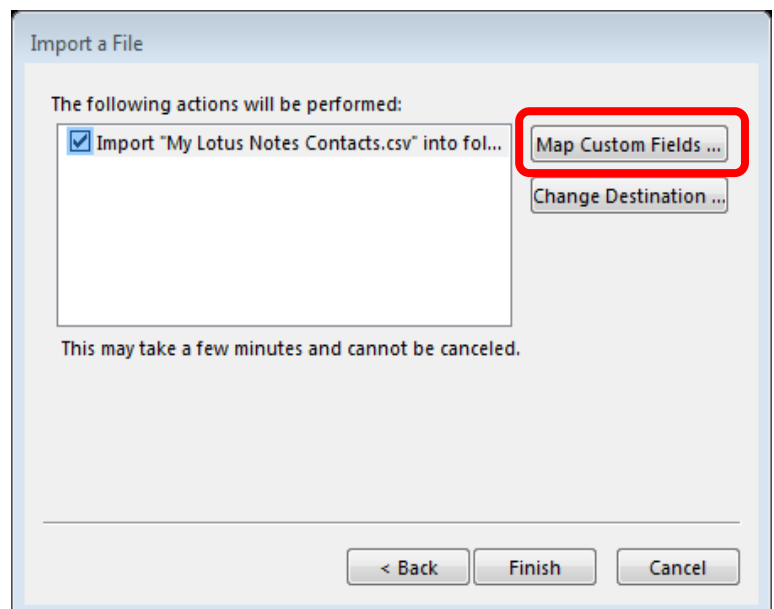
Under Select Destination Folder, select **Contacts**.

*This is the location where your Lotus Notes contacts will be transferred to.*

Click **Next**



Click on **Map Custom Fields** button.

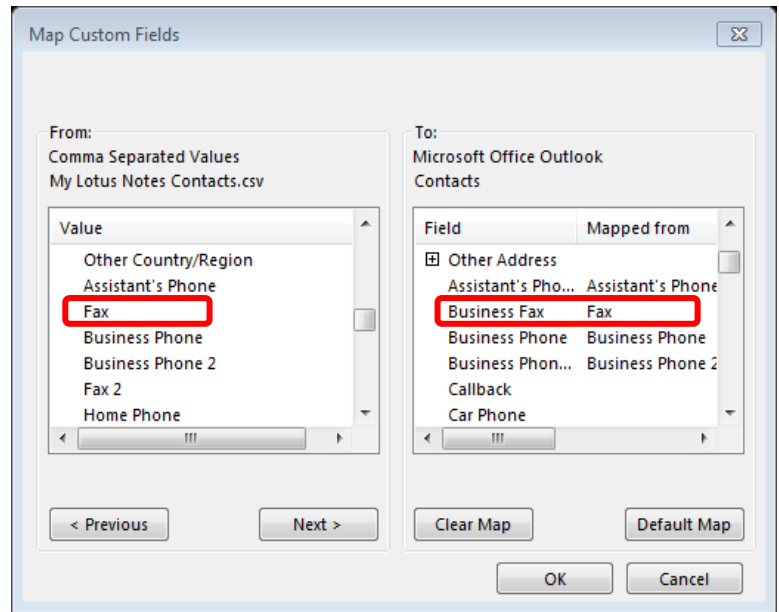


Many of the fields used to store the contact information are correctly matched for you when importing the information into Outlook.

There are some fields that have not been matched.

If you have business fax numbers stored in your Lotus Notes contacts you will need to locate **Fax** in the value column.

**Single click, hold and drag** the value Fax to Business Fax under Mapped from in the right column.



Another field that needs to be mapped are email addresses. In the Lotus Notes contact file, the following contact information has been stored under the following fields.

Internet Address = Contact's Business Email Address

Personal Mail = Contact's Personal Email Address

Assistant's Mail = Contact's Assistant's Email Address

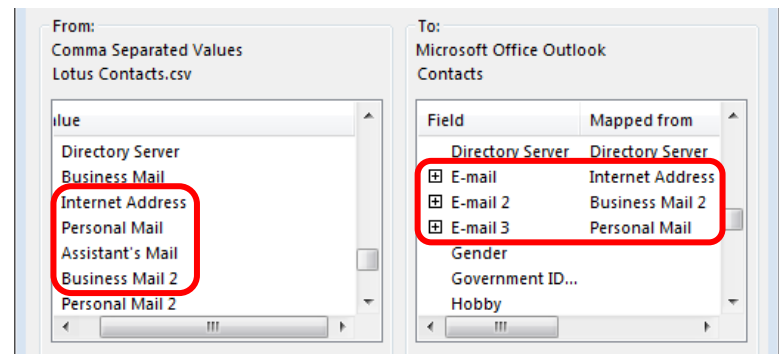
Business Mail 2 = Contact's Second Business Email Address

Personal Mail 2 = Contact's Second Personal Email Address

When mapping the fields to Outlook, you will only be able to assign up to 3 emails per contact.

**Single click, hold, and drag** the value in the left from column and assign it to the appropriate field in the right column.

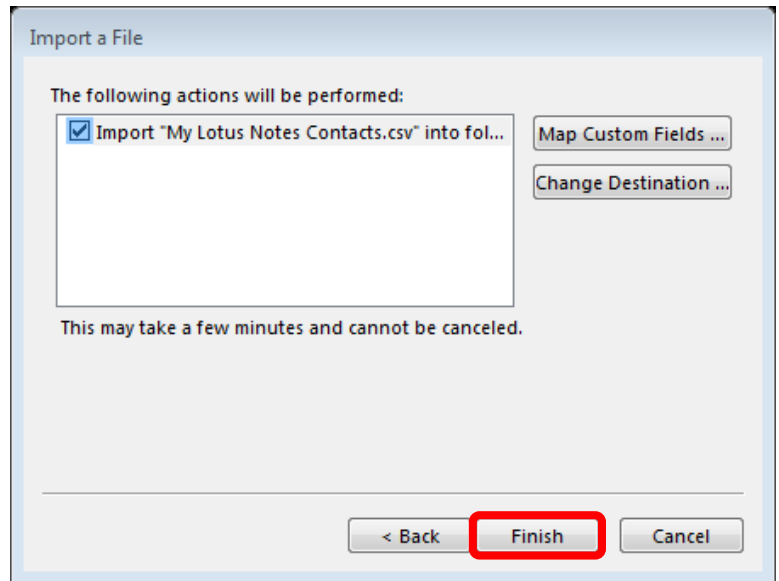
When complete click **OK** to save the field mapping.



You have completed the setup to import your contacts.

Click Finish to start the import process.

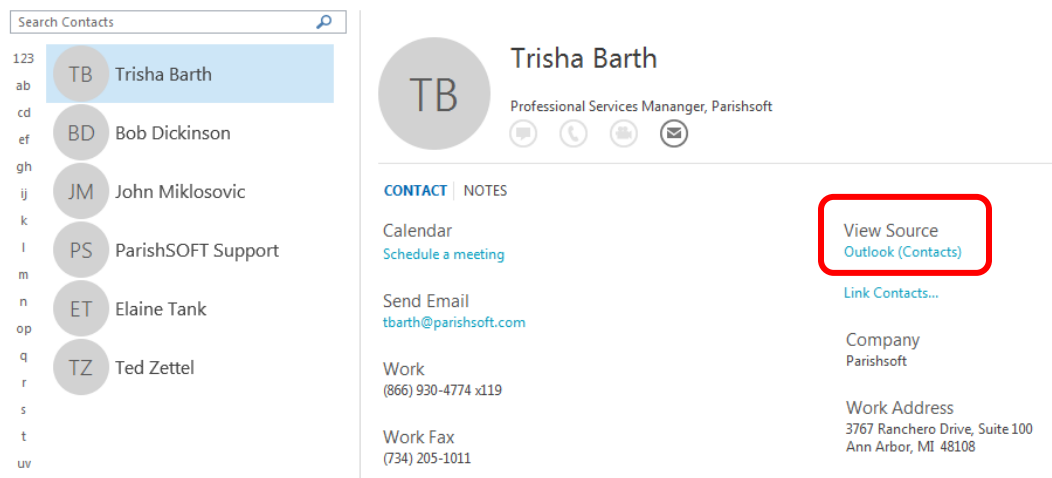
**Depending on the number of personal contacts you have, the importing procedure may take a few minutes to complete.**



When the process has finished, your personal contact will appear

Please take the time to review your contacts to ensure all the information was properly imported into Outlook.

To review, select a contact and click on the Outlook (Contacts) link located under View Source.



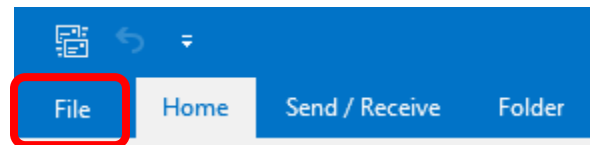
The following screen will now appear displaying the contact information imported into Outlook.

If needed, make changes or additions to the contact information.

To exit this screen, click **Save and Close**.

The screenshot shows the Outlook 'Contact' form for 'Trisha Barth'. The form is divided into several sections: 'Full Name...' (Trisha Barth), 'Company' (Parishsoft), 'Job title' (Professional Services Manager), 'File as' (Barth, Trisha), 'Internet' (Email: tbarth@parishsoft.com), 'Display as' (Trisha Barth <tbarth@parishsoft.com>), 'Web page address', 'IM address', 'Phone numbers' (Business: 866-930-4774 x112, Home, Business Fax: 734-205-1011, Mobile), and 'Addresses' (Business: 3767 Ranchero Drive, Suite 100, Ann Arbor, MI 48108). A 'Map It' button is visible next to the address. On the right, there is a contact card with a photo placeholder and a summary of the contact's information.

If you missed a field mapping, you can redo the import process by clicking on the **File** tab



Then **Open & Export** to redo the process again.

Repeat the steps above to remap the fields.

