

ADMINISTRATIVE OFFICE OF THE COURTS



Welcome!

GroupWise-to-Outlook Migration Training

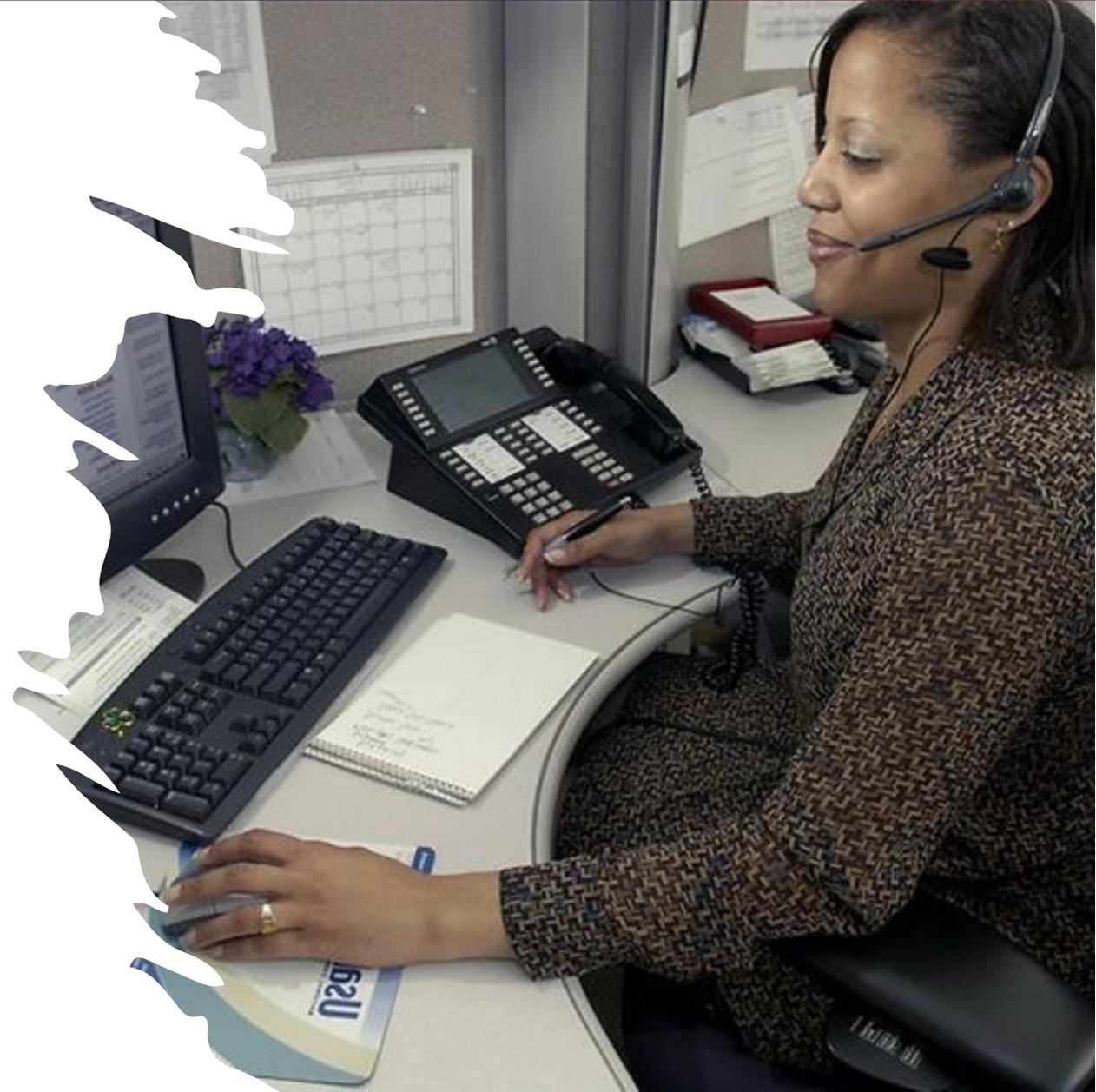
(Desktop M365 Outlook Application)

Training duration = 90 minutes

- Be present.
- You can use Q&A to ask questions.
- We will “parking lot” questions that require further research.
- Training, reference materials, and support contact information are available at:

<https://tncourts.gov/microsoft-migration>

(Password: L4wtech24)



Purpose

Introduce the Microsoft Outlook tool and available support resources.

Course Objectives

Upon completion of this course, you will be able to describe:

- Outlook capabilities.
- How to send, receive, reply, and manage email.
- How to create and manage meeting invitations.
- How to delegate and work with shared calendars and mail.
- Where to access job aids and help videos.



#	Lesson Name	Duration
1	Introduction and Outlook Overview	10 min.
2	Email Basics	10 min.
3	Managing Views and Email	15 min.
4	Calendar and Meeting Basics	15 min.
5	Sharing and Delegation	30 min.
6	Next Steps and Support Resources	5 min.

Objective: At the end of this lesson, you will be able to describe . . .

- Benefits of moving to Outlook
- How to access Outlook
- How to navigate Outlook at the highest level:
 - Menu/Ribbon structure
 - Mail
 - Calendar
- Global search (very powerful!)





Improved integration with other state agencies



User-friendly, streamlined interface



Updated technology and security



Prepares the way for greater collaboration via other Microsoft apps



Demonstrates our commitment to be forward-thinking and responsive to change.





1. Double-click the Outlook desktop shortcut.

Result: The application displays.

Note: Mobile access is available for those who currently have mobile access. Those who are interested can contact the helpdesk to request it. Access occurs through the Outlook app on the App Store or Google Play.

Outlook Navigation

Lesson 1

A primary feature in all Microsoft Office applications (Outlook, Word, Excel, PowerPoint) is the “ribbon.”

Just like hanging pot and utensil holders, ribbons enable you to find the tool you want without hunting through cabinets.



Outlook Navigation

Lesson 1

The screenshot shows the Outlook interface with several annotations:

- Menu / Ribbon:** A dark blue box with white text pointing to the top ribbon area.
- Hide Ribbon:** A dark blue box with white text and a red arrow pointing to the 'x' icon in the top right corner of the ribbon.
- App Selector:** A dark blue box with white text and a red arrow pointing to the left-hand navigation pane.
- Mail Folders / Shared Calendars:** A dark blue box with white text and a red arrow pointing to the list of mail folders in the left-hand pane.

The interface includes a search bar at the top, a ribbon with tabs like File, Home, Send / Receive, Folder, View, and Help. The main area displays an email from David Thomas with the subject 'Random email test for screenshot purposes'. The right-hand pane shows a calendar for May 2024 with several meetings listed.

Calendar Navigation + Shared Calendars

Lesson 1

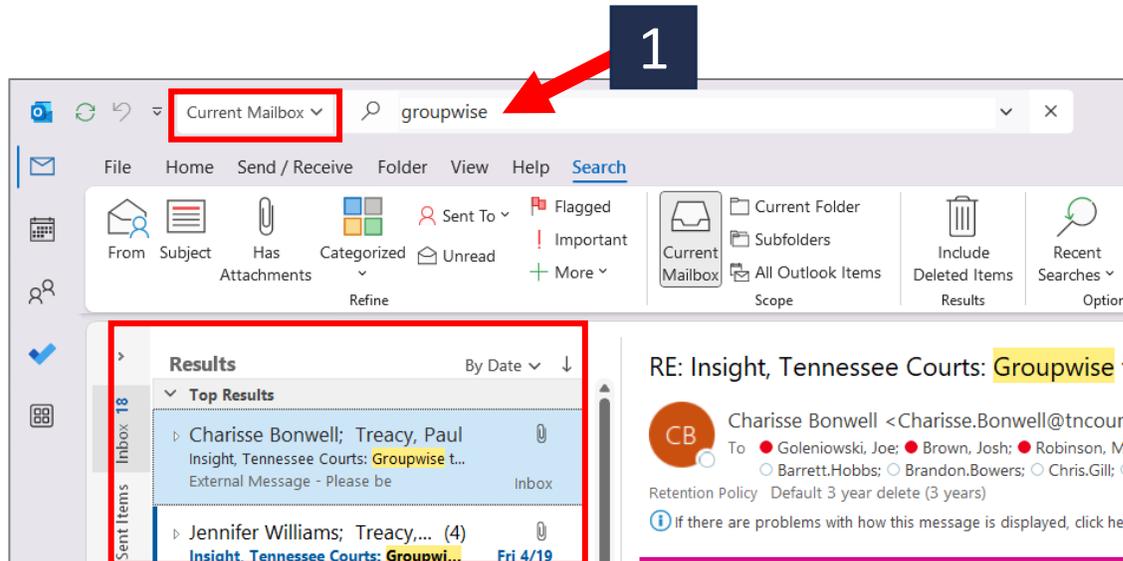
The screenshot displays the Microsoft Outlook calendar interface. The top ribbon includes tabs for File, Home, Send / Receive, Folder, View, and Help. The 'View' tab is active, showing options for Day, Work Week, Week, Month, and Schedule View. The 'Month' view is selected and highlighted with a red box. Below the ribbon, the calendar shows the month of May 2024. The 'My Calendars' section on the left is also highlighted with a red box, showing 'Calendar' and 'United States holidays' checked. The main calendar area displays a grid for May 2024 with various events and holidays. A secondary window titled 'United States holidays' is open, showing a grid for May 2024 with holidays like Mother's Day and Peace Officers Memorial Day.

Items: 6 Reminders: 1 5/20/2024 All folders are up to date. Connected to: Microsoft Exchange

Demo

Search Mail and Calendar

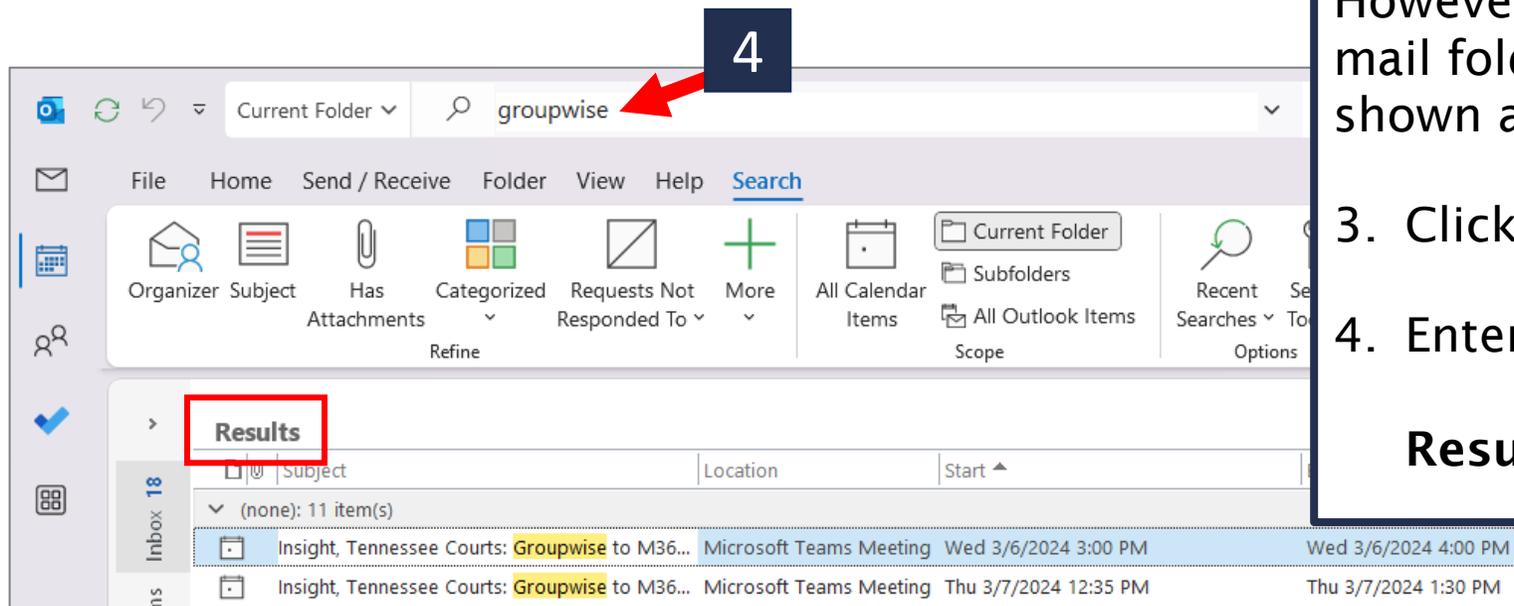
Lesson 1



By default, you are searching all **Mail** folders *and* subfolders.

1. Type a search term or phrase.
2. Press **ENTER** on your keyboard.

Result: Matching items are displayed.



However, you **MAY** search just a specific mail folder, or **Calendar** items only (as shown at left), or **All Outlook Items**.

3. Click **Calendar** in the **App Selector**.
4. Enter search terms and press **ENTER**.

Result: Only calendar items appear.

Knowledge Check

Which of the following is a correct statement about ribbons in Outlook?

- A. Ribbons are an advanced feature that few people use in Outlook.
- B. Leaving ribbons displayed is recommended. It makes it easier to find buttons and tasks you can perform.
- C. Ribbons refer to awards you receive when you use Outlook correctly for 90 days.



Objective: At the end of this lesson, you will be able to describe . . .

- How to create and send email
- Use the global address book
- Set up Automatic Replies (out of office)
- Create a new contact or contact group
- Create your email signature

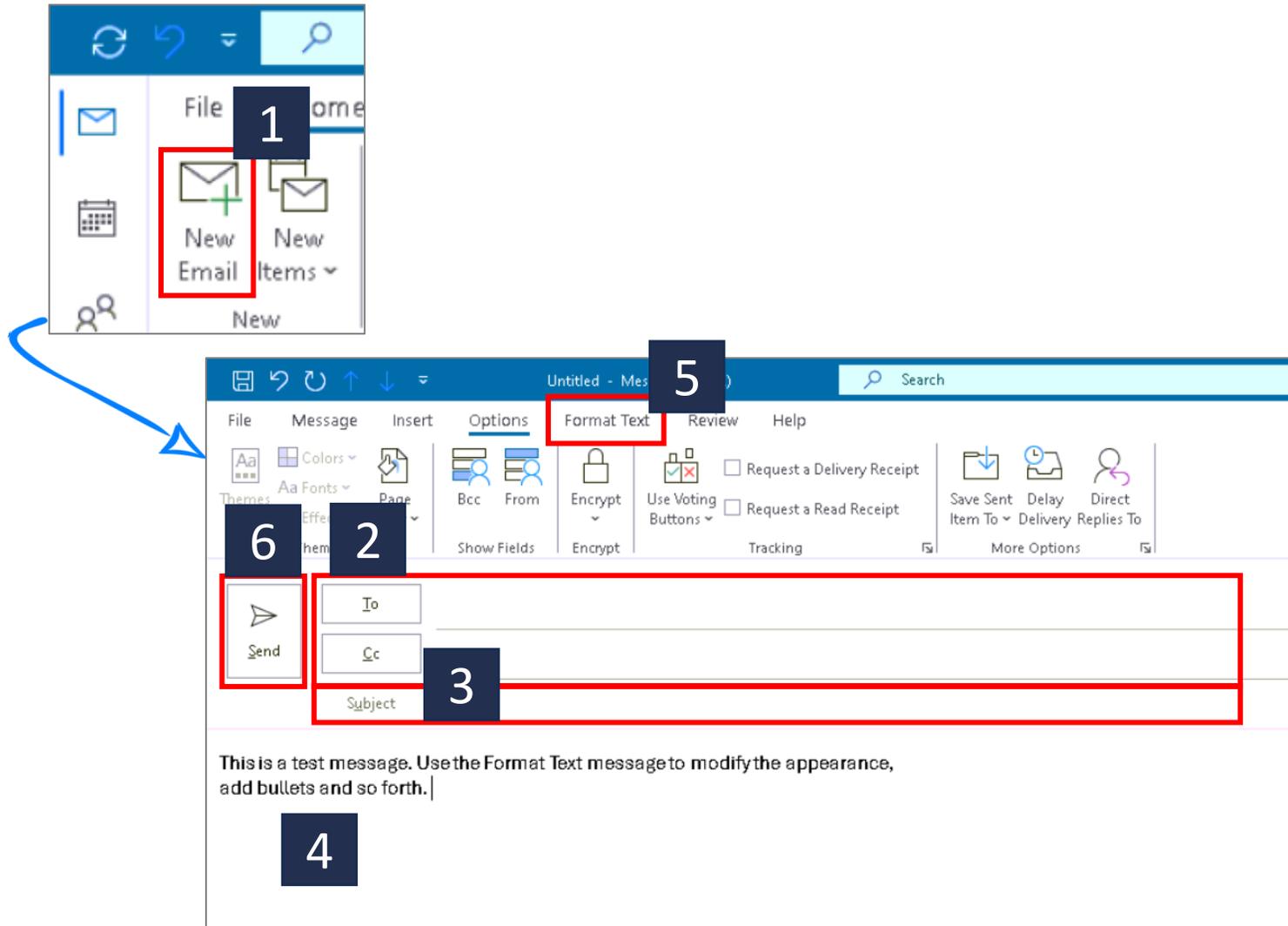
Duration: About 10 minutes



GroupWise Term	Outlook Term
Distribution List	Contact Group

Create and Send Email - Overview

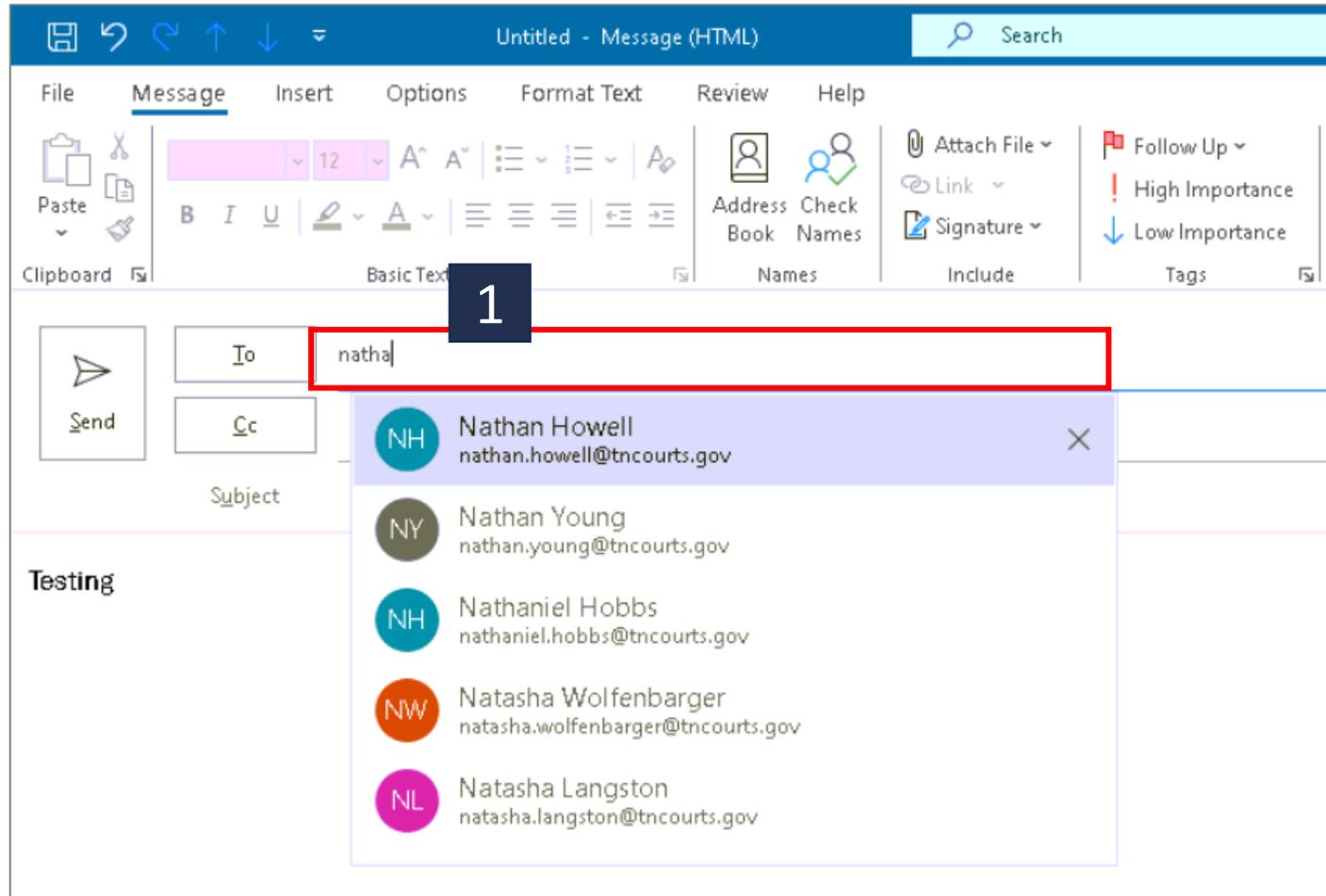
Lesson 2



1. Choose **New Email** to start a new message.
2. Enter a name or email address in the **To** and **Cc** fields (details provided on next slides).
3. In **Subject**, type the subject of the email message.
4. Place the cursor in the body of the email message to create your message.
5. Click **Format Text** menu if you need to change fonts, add bullets, indent, etc.
6. After finishing your message, click **Send**.

Type Names Directly in the To or Cc Lines

Lesson 2

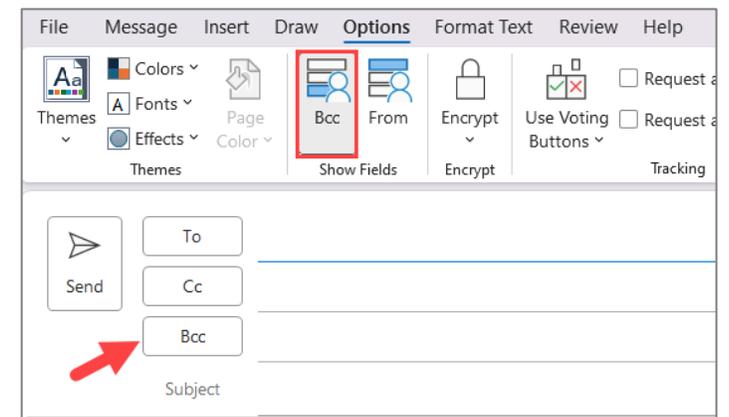


To select one or more contacts:

1. Type first few letters of first or last name in the **To** or **Cc** line.

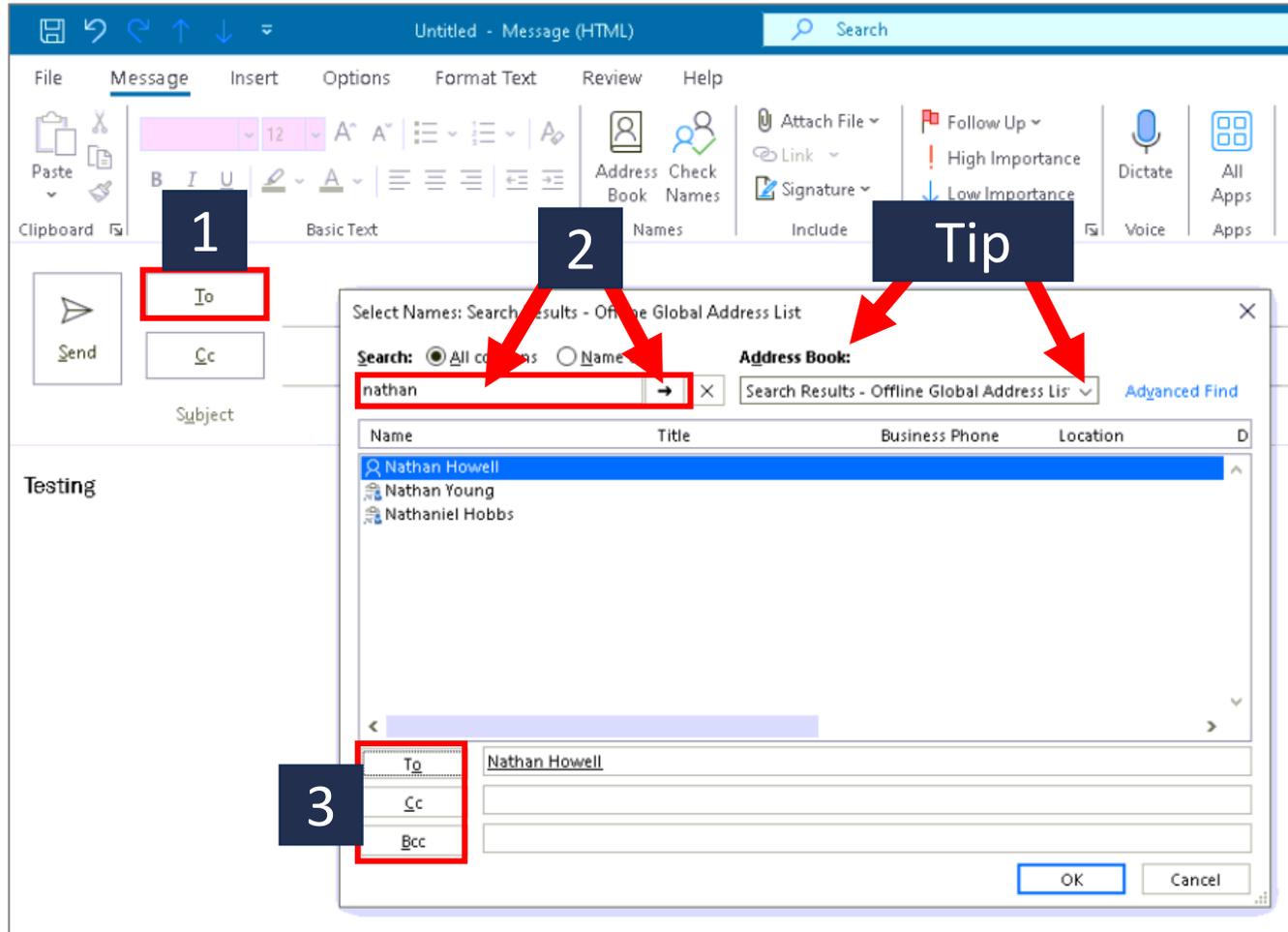
Frequently used contacts appear first. Other names from your organization appear next.

Note: To add a **Bcc**, you must click the **Options** menu, then **Bcc** (see below).



Use the Global Address Book

Lesson 2



To select one or more contacts:

1. Click the **To** button.
2. Search for a person using first or last name, then click the **right-arrow** button.
3. Click **To**, **Cc** or **Bcc** to add them to the email, then click **OK**.

Tip: Change the **Address Book** to your own **Contacts** to access names that you manage outside of the organizational directory.

Set up Automatic Replies (Out-of-Office)

Lesson 2

Inbox - insight-test04@tncourts.gov

Account Information

insight-test04@tncourts.gov
Microsoft Exchange

+ Add Account

Account Settings

Change settings for this account or set up more connections.

- Access this account on the web.
<https://outlook.office365.com/owa/tncourts.gov/>
- Get the Outlook app for iOS or Android.

2 Automatic Replies

3 Automatic Replies - insight-test04@tncourts.gov

Do not send automatic replies
 Send automatic replies

Only send during this time range:

Start time: Mon 5/6/2024 11:00 AM
End time: Tue 5/7/2024 11:00 AM

Automatically reply once for each sender with the following messages:

Inside My Organization Outside My Organization (On)

Segoe UI 8 B I U A

I will be out of the office from X to Y. Please contact so and so in my absence.

This message goes to everyone inside my organization.

I need to copy and paste this message into the Outside My Organization tab, and if I want a different message to individuals outside my organization, I can modify it there.

Then click OK.

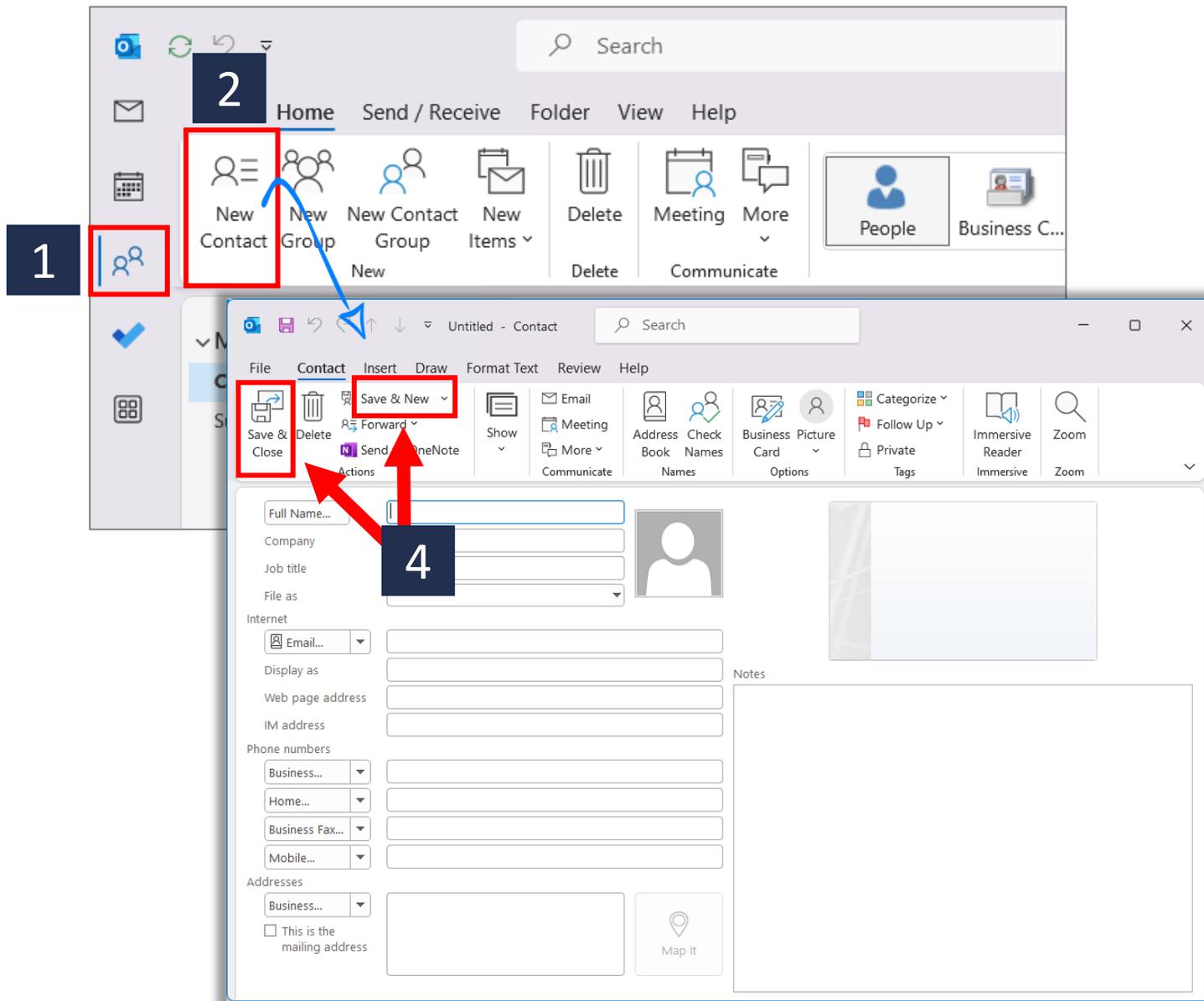
Rules... OK Cancel

1. Click the **File** menu (not shown).
2. Click **Automatic Replies (Out-of-Office)**.
3. Click the **Send automatic replies** radio button. (Check **Only send during this time range**, if you want to specify and start and end time for replies.)
4. Complete the **Inside My Organization** section with the desired message to your own organization. Copy that message (Ctrl + c) before moving on to step 5.
5. Click **Outside My Organization** and paste the above message; modify if needed.
6. Click **OK**.

Demo

Create a New Contact

Lesson 2



1. Click **People**.
2. Click **New Contact**.
3. Add desired information.
4. Click **Save & Close** to create only one contact (or **Save & New** to create another).

Create a Contact Group

Lesson 2

1. Click the **People** icon in the left sidebar.

2. Click **New Contact Group** in the ribbon.

3. Enter the name **Project A Team Members** in the **Name** field.

4. Click **Add Members**.

5. In the **Select Members** dialog, search for **wendy** and select **Wendy Wesley**.

6. Click **OK** to add the member.

7. Click **Save & Close** in the ribbon.

1. Click **People**.
2. Click **New Contact Group**.
3. Enter a **Name** for your group.
4. Click **Add Members** (or double-click in the “We didn’t find anything to show here” field).

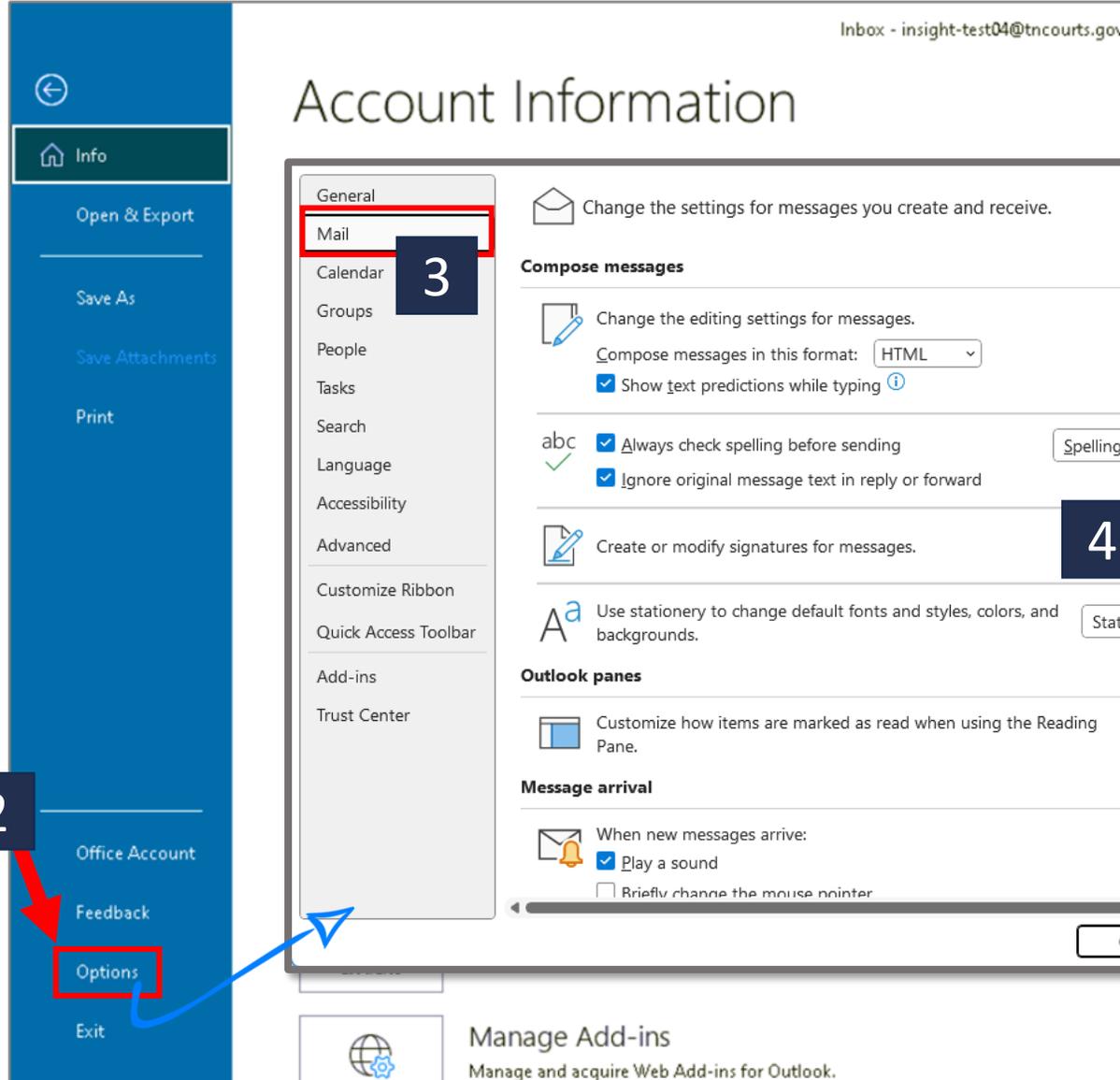
Result: Options appear to either select from your personal Outlook Contacts or from the Address Book (which is the official set of TN Courts contacts).

5. Enter the desired first or last name into the **Search** field, then click the arrow (or press ENTER).
6. Select the desired person’s name and click the **Members** button to add them to the list, and then click **OK**.
7. Repeat as needed, and then click **Save & Close**.

Demo

Set up Signature in Outlook

Lesson 2



1. Click the **File** menu (not shown).
 2. Click **Options** (lower-left)
 3. Click **Mail**.
 4. Click **Signatures**.
- (Continued next page)

Set up Signature in Outlook (continued)

Lesson 2

Signatures and Stationery

E-mail Signature Personal Stationery

E-mail account: insight-test04@tncourts.gov

Select signature to edit

Main AOC signature

New

Delete

Rename

Edit signature

Aptos (Body) 12 B I U Automatic Business Card

7

First Name Last Name
TN Administrative Office of the Courts
511 Union St., Suite 600, Nashville, TN 37219
Phone 615.741.2687 ext. 4709
Web <https://tncourts.gov/>
Email First.LastName@tncourts.gov
Mission: To serve as a trusted resource to assist in improving the administration of justice and promoting confidence in the Judiciary.

8

Save Get signature templates

Choose default signature

New messages: (none)

Replies/forwards: (none)

OK Cancel

Continued from previous page:

5. Click **New**.
6. Enter desired signature name in **New Signature** text field (not shown).
7. Type or paste signature into text block.

Tip: You can add images and hyperlinks via buttons at right.

8. Click **Save**.

Tip: See that you can enter a different signature for new messages vs. replies/forwards!

Knowledge Check



Which of the following capabilities does Outlook support?

- A. You can blind-copy emails (**Bcc**), but you have to click **Options** to enable it.
- B. You can set up different **Automatic Replies** for tncourts.gov and non-tncourts.gov email addresses.
- C. You can type directly into the **To** line of a new email to display common contacts.
- D. You can have multiple signatures.
- E. All of the above

Objective: At the end of this lesson, you will be able to describe how to . . .

- Modify views
- How to create and move mail folders
- Print an email
- Organize and manage email using rules, categories, colors, flags, etc.

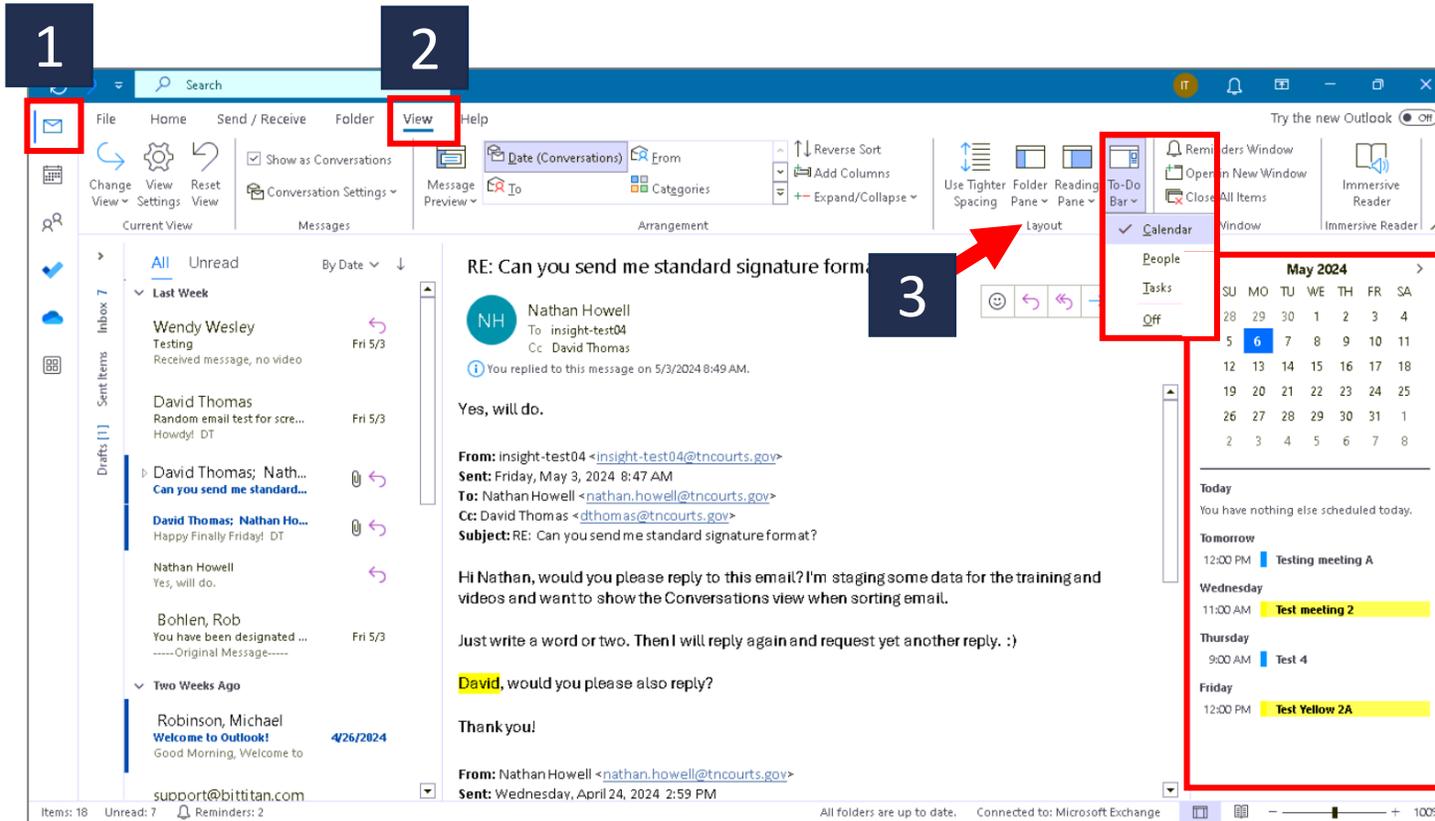
Duration: About 15 minutes



GroupWise Term	Outlook Term
Home	Outlook does not have a Home page; however, the Outlook View ribbon enables users to select layout preferences.
Categories	Outlook also uses Categories, but for some features, Outlook uses the term Tags.
Junk Mail	Junk Email
Trash	Deleted Items
Cabinet	Inbox is similar to the GroupWise Cabinet.
Open/Hide (folder pane)	Expand/Pin/Minimize (folder pane)

Modify the Outlook View

Lesson 3



1. Click **Mail**, if needed.
2. Select the **View** ribbon.
3. In the **Layout** group, select desired options in the **Folder Pane**, **Reading Pane**, and **To-Do Bar**.

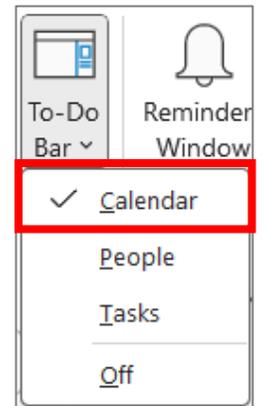
Tip: Common preferred settings are:

Arrangement: **Date (Conversations)**

Folder Pane: Normal (if you file email)

Reading Pane: Right

To-Do Bar: Only **Calendar** selected, as shown



Pin or Un-pin Folders

Lesson 3

The screenshot shows the Outlook interface with the folder pane on the left. A red box labeled '1' highlights the right-pointing arrow next to the 'Inbox' folder. A second red box labeled '2' highlights the right-pointing arrow next to the 'Inbox' folder in the expanded view. A third red box highlights the left-pointing arrow next to the 'Inbox' folder in the expanded view, with a tooltip that says 'Minimize the Folder Pane'. The main pane shows an email from Nathan Howell with the subject 'RE: Can you send me standard signature format?'.

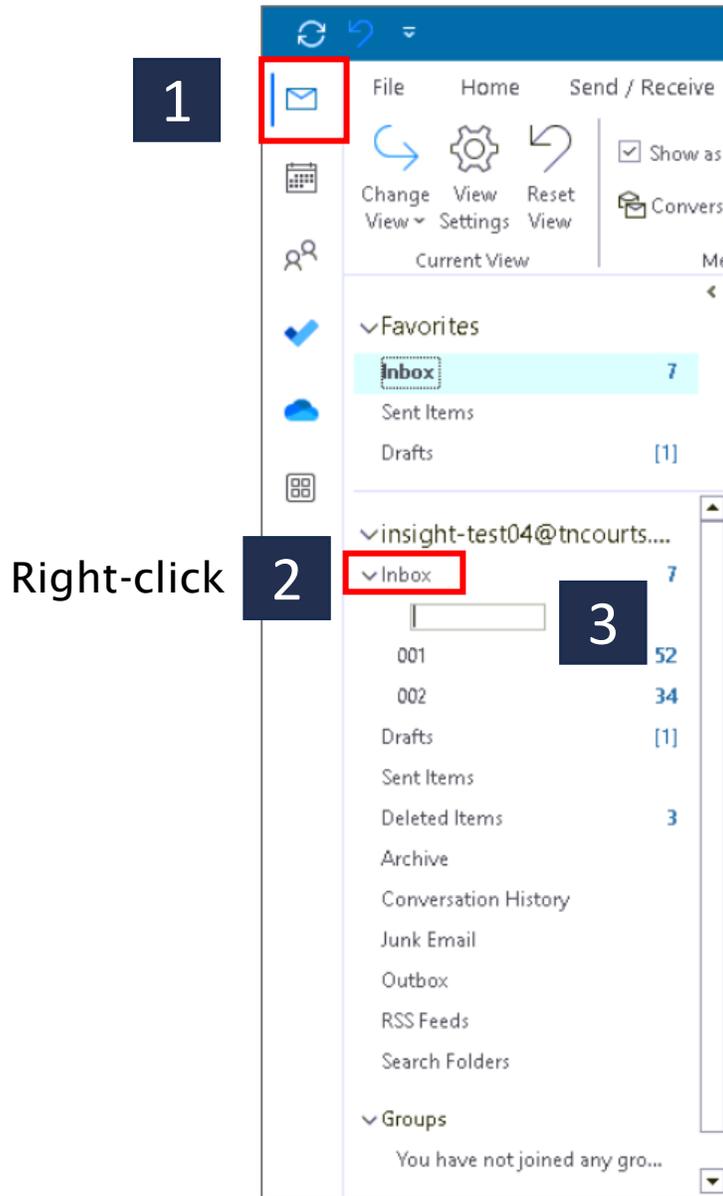
This works in either Calendar or Mail.

1. Click the tiny right-arrow (hover message says: **Click to Expand Folder Pane**).
2. Click the **Pin** button.

Result: The folders stay visible until you click the tiny left-arrow (hover message says: **Minimize the Folder Pane.**)

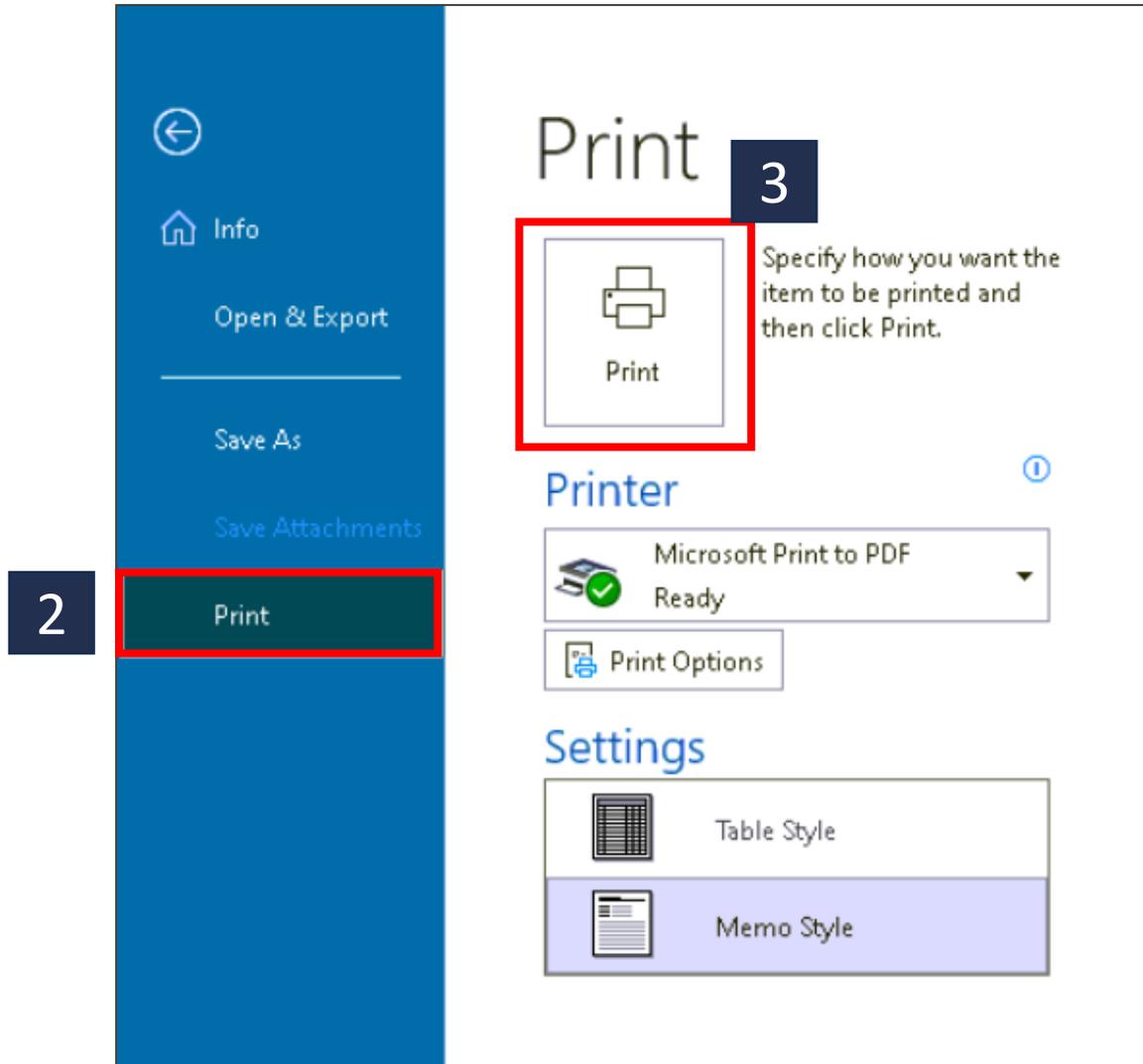
Create a New Mail Folder

Lesson 3



1. Click **Mail**, if needed.
 2. Right-click on **Inbox** (or a different folder, as desired)
- Result:** A blank text box appears below the item selected.
3. Enter a **Name** for the folder.
 4. Press ENTER on your keyboard.

Tip: You can drag email from the reading pane into any folder.



1. Click **File** menu (not shown).
2. Click **Print** (far left).
3. Click the large **Print** button (if the desired printer is showing the **Printer** field).

Notes: Microsoft Print to PDF enables you to save as a PDF file.

You can also select the drop-down arrow to the right of the Printer field to change the printer (shown at left).

Apply Tags (Reminders to take action)

Lesson 3

The screenshot shows the Outlook interface. The 'Home' ribbon is highlighted with a red box and a '2' in a black box. The 'Tags' dropdown menu is also highlighted with a red box and a '3' in a black box. The dropdown menu is open, showing options like 'Today', 'Tomorrow', 'This Week', 'Next Week', 'No Date', 'Custom...', 'Add Reminder...', 'Mark Complete', 'Clear Flag', 'Set Quick Click...', and 'Set Quick Actions...'. A yellow starburst callout points to the 'Follow-up' options in the dropdown menu.

1. Select the email you wish to tag.

2. Click **Home** ribbon, if needed.

3. Click **Tags**.

4. Select **Follow-up** for a list of options to apply to the selected email.

Tip: Categories are helpful to associate emails. **Follow-ups** help you manage your time.

RE: Can you send me standard signature format?

Nathan Howell
To: insight-test04 <insight-test04@tncourts.gov>
Cc: David Thomas

You replied to this message on 5/3/2024 8:49 AM

Yes, will do.

From: insight-test04 <insight-test04@tncourts.gov>
Sent: Friday, May 3, 2024 8:47 AM
To: Nathan Howell <nathan.howell@tncourts.gov>
Cc: David Thomas <dthomas@tncourts.gov>
Subject: RE: Can you send me standard signature format?

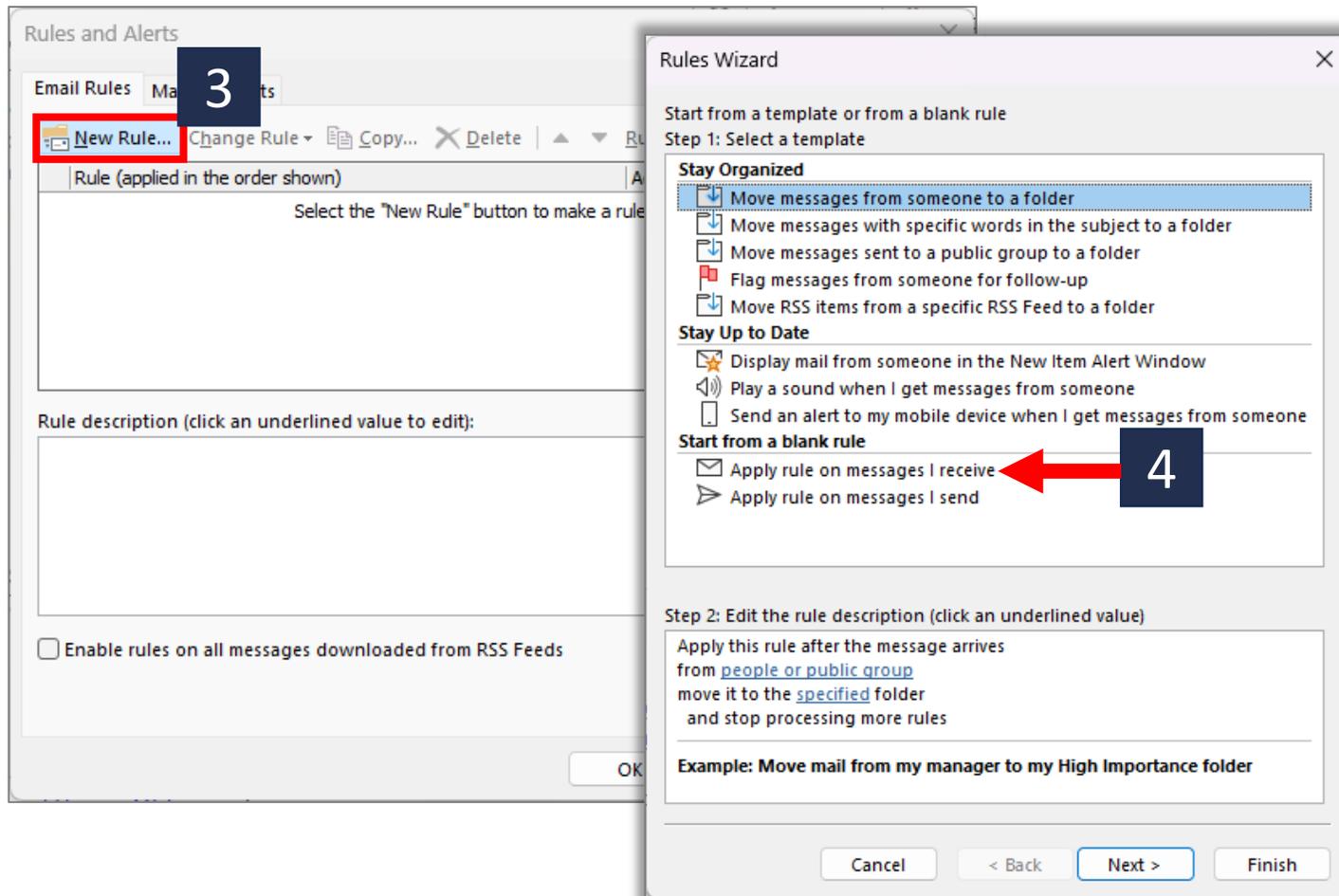
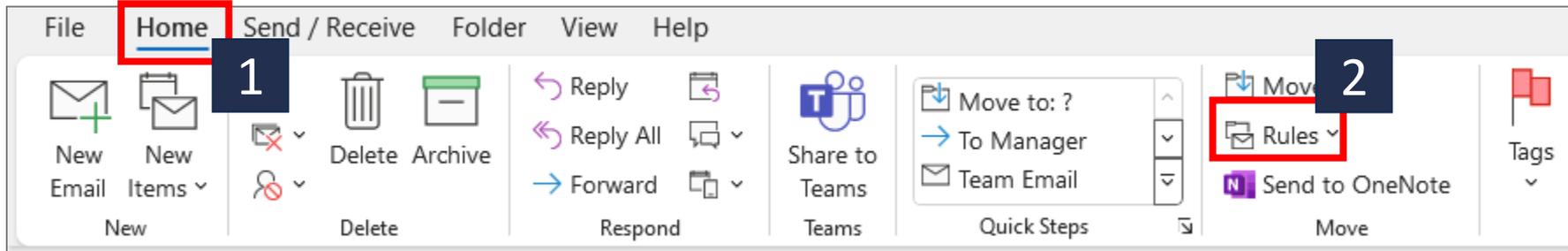
Hi Nathan, would you please reply to my previous email with some data for the training videos and want to show the Conversation view for the email.

Just write a word or two. Then I will reply again and request yet another reply. :)

You have been designated as a contact for this message. (1/1) 5/3
-----Original Message-----

Create and Manage Rules

Lesson 3



1. Click **Home** ribbon, if needed.
 2. Click **Rules**.
 3. Click **New Rule**.
 4. Create from a wizard or from scratch (see red arrow).
- Tip:** The possibilities are nearly infinite. Whatever you want to do, you can create a rule to manage it.

Knowledge Check

What's the quickest way to get your calendar be displayed on the right side of Outlook, beside your email?

- A. Mail → View → To-Do Bar → Calendar
- B. Search Google for “Display calendar on right side of mail inbox in Outlook”
- C. Ask your colleague.



Objective: At the end of this lesson, you will be able to describe how to . . .

- Change calendar views/colors
- Create a new meeting
- Add Zoom link/info
- Add AOC Resources (e.g., a room)
- Check participants' availability
- Add recurrence
- View tracking responses
- Respond to meeting invitations
- Propose new meeting times

Duration: About 15 minutes



GroupWise Term	Outlook Term
Busy Search	Scheduling Assistant
Propose New Time	Propose Time

Change Calendar Views

Lesson 4

The screenshot shows the Outlook calendar interface. A red box labeled '1' highlights the Calendar icon in the top-left corner. A red box labeled '2' highlights the 'Arrange' group in the View ribbon, which includes options for Day, Work Week, Week, Month, and Schedule View. The 'Week' view is currently selected. A context menu is open over a meeting titled 'Test meeting 1' on Monday, May 6, 2024, at 9 AM. A box labeled '3' highlights the 'Categorize' option in the context menu. Below the context menu, a list of categories is shown, including 'Blue category', 'Client meeting', 'Green category', 'Orange category', 'Out of office', 'Purple category', 'Red category', and 'All Categories...'. The calendar grid shows several meetings: 'Test meeting 1' (green), 'Testing Green 1.1' (green), 'Test 4' (blue), and 'Test Yellow 2A' (yellow). The status bar at the bottom indicates 'Items: 6', 'Reminders: 2', and 'Connected to: Microsoft Exchange'.

1. Click **Calendar**, if needed.
2. Click desired timeframe in the **Arrange** group.
3. If you wish to color-code meetings, **right-click** a meeting and select a **Category** color.

Create a New Meeting: The Basics

Lesson 4

1. From Calendar, click the **Home** ribbon, if needed.

2. Click **New Meeting**.

3. Enter the following:

- Title**
- Required** and **Optional** participants
- Start time** and **End time**

4. Update **Location** (or **Schedule a Meeting** button for Zoom).

5. Enter content (and click **Format Text** if you need to modify fonts, bullets, etc.).

6. Click **Send**.
(More details next page.)

1. From Calendar, click the **Home** ribbon, if needed.
2. Click **New Meeting**.
3. Enter the following:
 1. **Title**
 2. **Required** and **Optional** participants
 3. **Start time** and **End time**
4. Update **Location** (or **Schedule a Meeting** button for Zoom).
5. Enter content (and click **Format Text** if you need to modify fonts, bullets, etc.).
6. Click **Send**.
(More details next page.)

Untitled - Meeting

File Meeting Scheduling Assistant Insert Format Text Review Help

Delete → Schedule a Meeting Zoom Cancel Invitation Attendees Options Tags Dictate Voice Immersive Reader Immersive New Scheduling Poll Find Time Meeting Notes OneNote

ⓘ You haven't sent this meeting invitation yet.

⊗ Enter a start time and duration for your event so that the end time is later than the current time [Dismiss](#)

Send

Title

Required

Optional

Start time Mon 5/6/2024 1:00 PM All day Time zones

End time Mon 5/6/2024 2:00 PM [Make Recurring](#)

Location

In Shared Folder Calendar

Let's discuss:

- Zoom – For those who have ZoomGov accounts, it is much easier to add Zoom meetings as the location than before.
- Only AOC users can use the AOC conference rooms. Non-AOC user may have access to other conference rooms.
- Do NOT schedule conference rooms through shared calendar (proxy). Use the method shown here to schedule the meeting *first*, then add **Location**.

Use Scheduling Assistant (Busy Search)

Lesson 4

The screenshot displays the Microsoft Teams Scheduling Assistant interface. The top ribbon shows the 'Scheduling Assistant' tab selected, with a red box and the number '1' highlighting it. A blue arrow points from this tab to the 'Meeting' tab, which is also highlighted with a red box and the number '3'. Below the ribbon, the meeting title 'Sample meeting for training' is visible. The 'Start time' and 'End time' fields are set to 'Mon 5/6/2024' and '12:00 PM' to '1:00 PM' respectively, with a red box and the number '2' highlighting these fields. The main area shows a calendar view for Monday, May 6, 2024, with a red box and the number '2' highlighting the time slot for the meeting. A red arrow points from the 'Meeting' tab back to the 'Scheduling Assistant' tab. The bottom of the interface shows a legend for availability: Busy (blue), Tentative (light blue), Out of Office (pink), Working Elsewhere (grey), No Information (white), and Outside of working hours (hatched).

From a new meeting window:

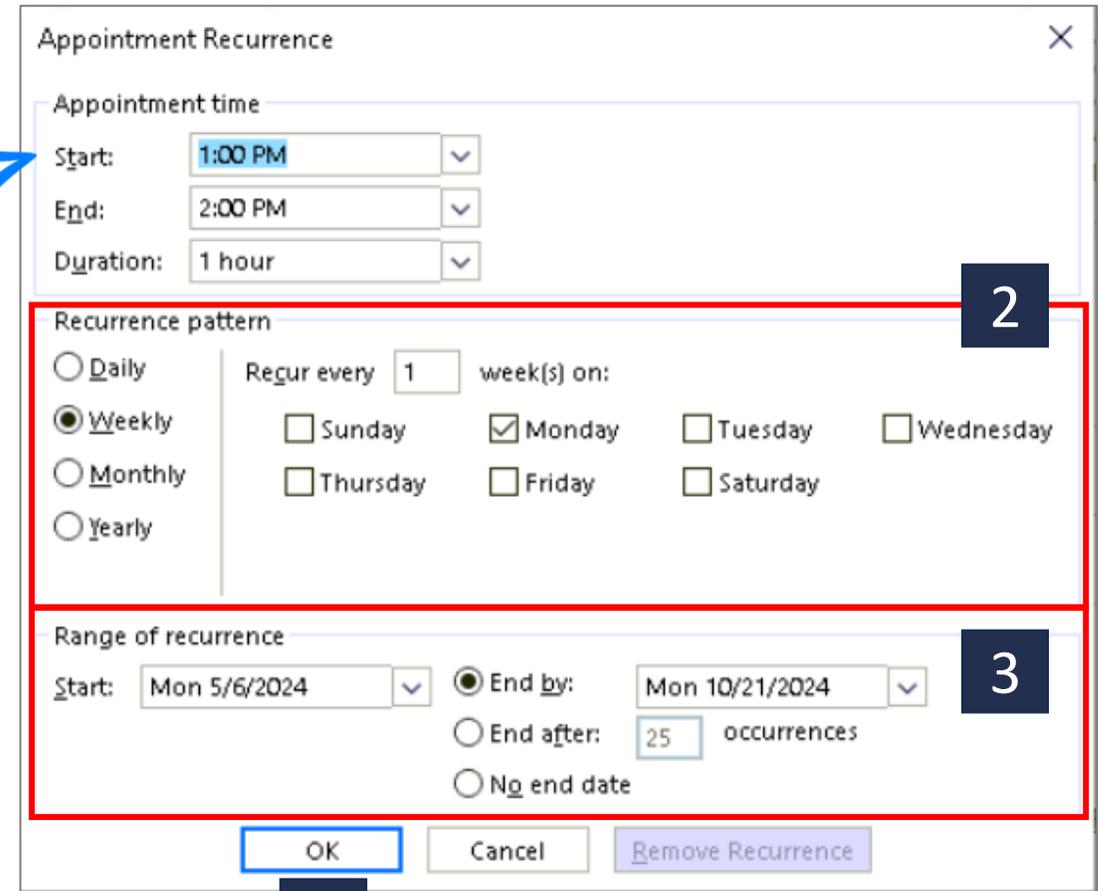
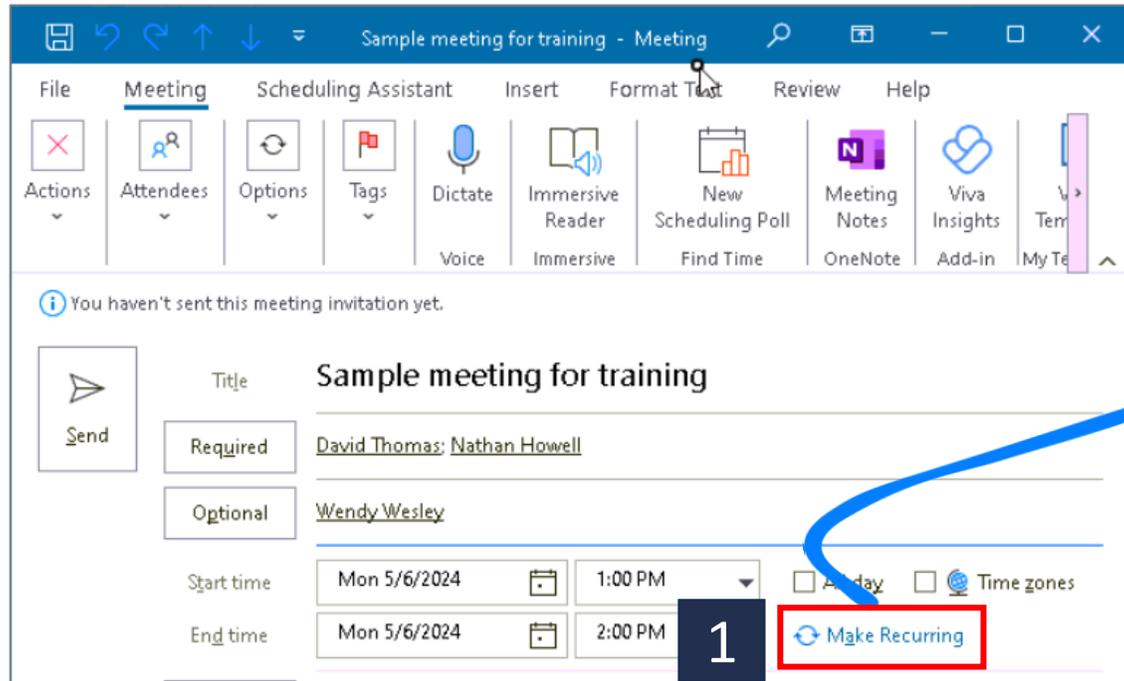
1. Click **Scheduling Assistant**.
2. Use the scroll bar to move the times and dates, as needed until you find a slot that is suitable for all participants.

Note: As you move the selection window, the Start and End date/times automatically update.

3. **Optional:** Return to **Meeting** tab to make other changes, add an agenda, etc.

Make Meeting Recurring

Lesson 4

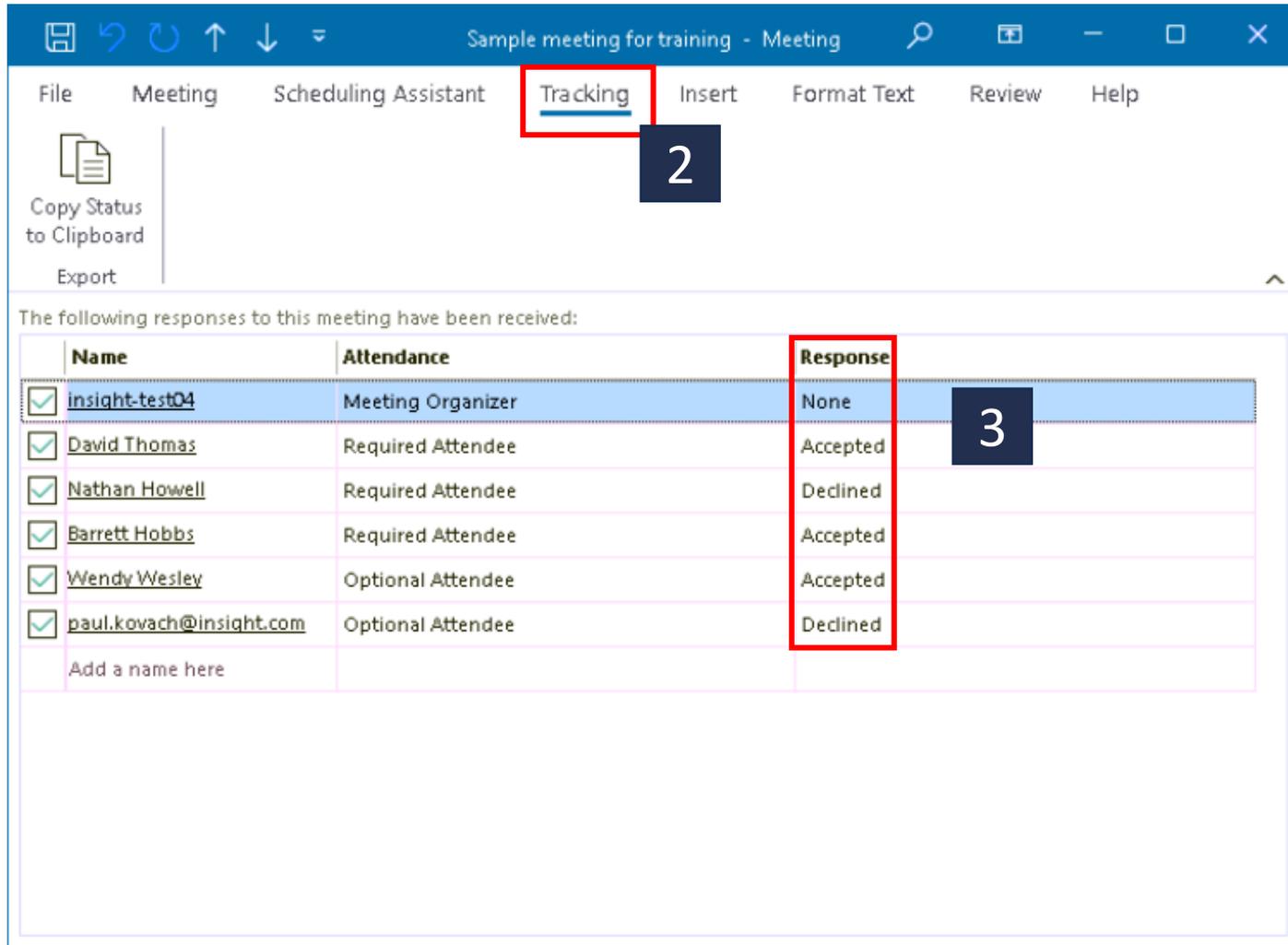


From a new meeting window:

1. Click **Make Recurring**.
2. Edit **Recurrence pattern** as needed.
3. Edit **Range of recurrence**.
4. Click **OK**.

View Tracking of Participant Responses

Lesson 4



The screenshot shows the Microsoft Word interface for a meeting titled "Sample meeting for training - Meeting". The "Tracking" menu is highlighted with a red box and a blue box containing the number "2". Below the menu, a table displays the following responses to the meeting:

Name	Attendance	Response
<input checked="" type="checkbox"/> insight-test04	Meeting Organizer	None
<input checked="" type="checkbox"/> David Thomas	Required Attendee	Accepted
<input checked="" type="checkbox"/> Nathan Howell	Required Attendee	Declined
<input checked="" type="checkbox"/> Barrett Hobbs	Required Attendee	Accepted
<input checked="" type="checkbox"/> Wendy Wesley	Optional Attendee	Accepted
<input checked="" type="checkbox"/> paul.kovach@insight.com	Optional Attendee	Declined
<input type="checkbox"/> Add a name here		

The "Response" column is highlighted with a red box and a blue box containing the number "3".

1. Double-click the desired meeting from the calendar (not shown).
2. Click **Tracking**.
3. View **Response** column to see whether Attendees have responded. Options include:
 - None
 - Accepted
 - Tentative
 - Declined

Respond to Meeting Invitation

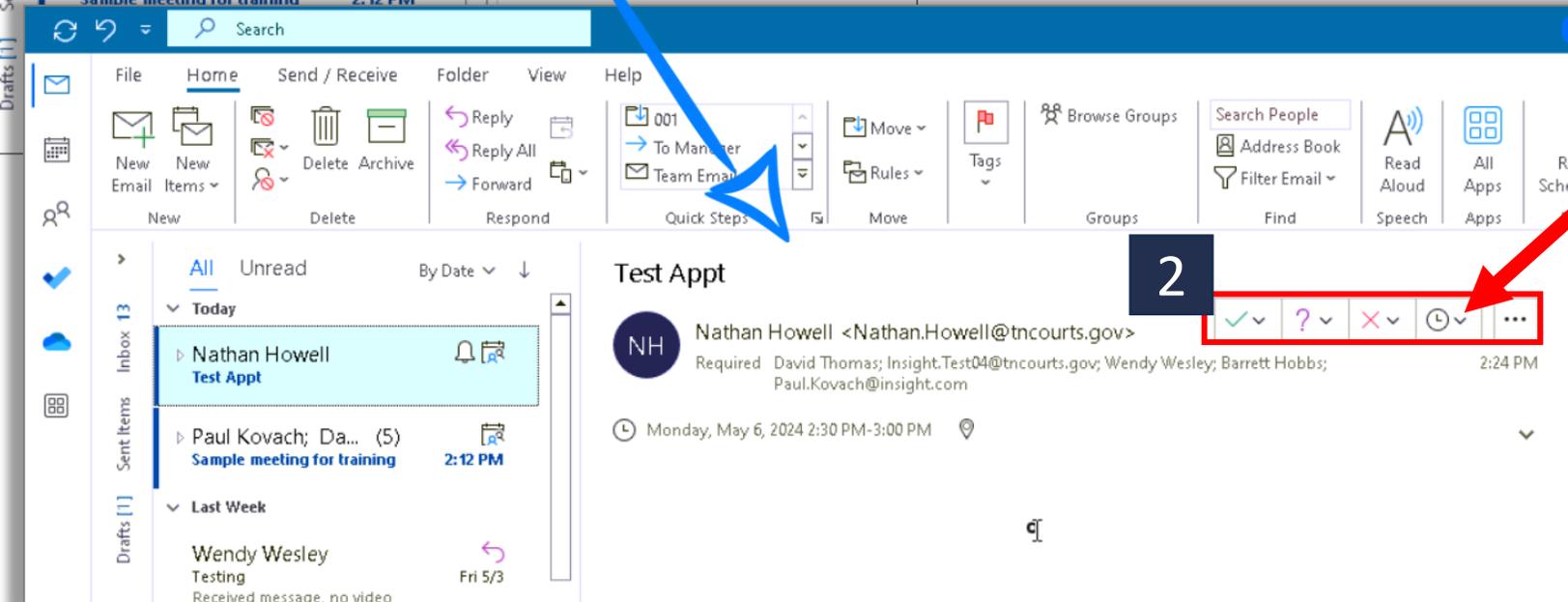
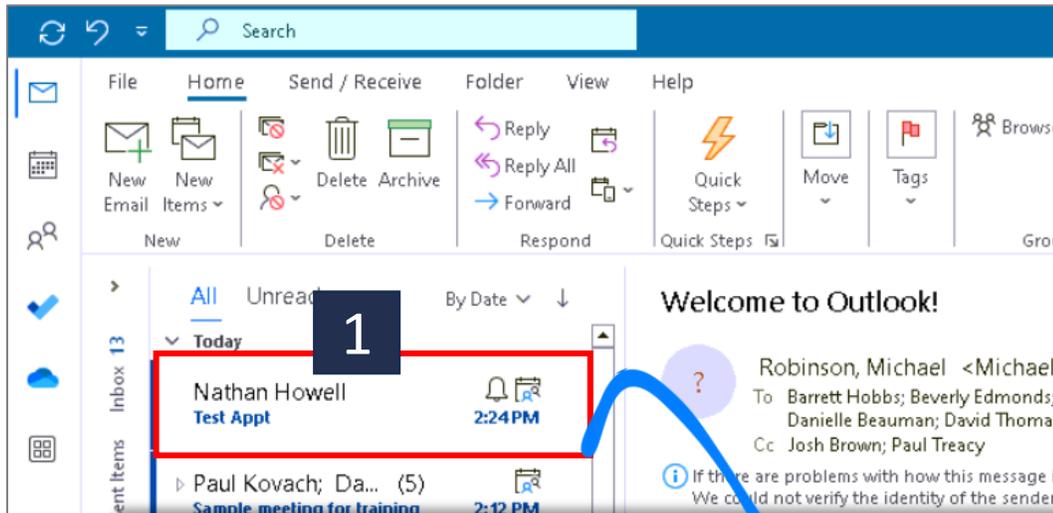
Lesson 4

1. Single-click the invitation in Mail.

Result: The preview of your calendar shows the proposed date/time with other meetings.

2. Click the **Accept**, **Tentative**, or **Decline** buttons, as appropriate.

Tip: The **Clock** button enables you to propose a new time.



Propose New Meeting Time

Lesson 4

Propose New Time: Test Appt

Zoom 100%

All Attendees

- Required Attendee
 - Nathan Howell <nathan.howell@tncourts.gov>
 - David Thomas
 - Insight.Test04@tncourts.gov
 - Wendy Wesley
 - Barrett Hobbs
 - Paul.Kovach@insight.com
- Optional Attendee
- Resource (Room or Equipme...

Meeting start time Mon 5/6/2024 2:30 PM

Meeting end time Mon 5/6/2024 3:00 PM

Options

AutoPick Next

Busy Tentative Out of Office Working Elsewhere Current Meeting Time No Information

Current Meeting Time

Propose Time Cancel

1. Click elsewhere in the same date or move the horizontal scroll bar (very tiny, under the grid) and select new meeting time.
2. Confirm date/time displayed look correct.
3. Click **Propose Time**.
Result: **New Time Proposed** draft is displayed.
4. Add a message (optional) and click **Send**.

New Time Proposed: Test Appt - Meeting Response

File Meeting Response Insert Options Format Text Review

Aptos (Body) 12 A⁺ A⁻

B I U Bold Italic Underline

Clipboard FS Basic Text FS Names Include Tags FS

To Nathan Howell <nathan.howell@tncourts.gov>

Cc

Subject New Time Proposed: Test Appt

Current Monday, May 6, 2024 2:30 PM-3:00 PM

Proposed Monday, May 6, 2024 2:30 PM-3:00 PM

Location

Type your reason for needing a new time, if appropriate.

Knowledge Check



When you want to respond to a meeting invitation by proposing a different time or date, which of the following is true?

- A. You CANNOT view all invited parties' schedules. Only the organizer's.
- B. You CAN view all invited parties' schedules, so that you can propose a time when everyone is available.
- C. You can only reply to the organizer with an email requesting your preferred time.

Objective: At the end of this lesson, you will be able to describe how to . . .

- View a shared calendar
- Share your own calendar
- Delegate mail and calendar access
- Share mail folders or calendars with a working group
- Request admin-created Shared Mailboxes, when necessary

Duration: About 30 minutes



GroupWise Term	Outlook Term
Shared Mail or Shared Calendar (same term in Outlook)	Shared Mailbox or Shared Calendar (Owned by one user, but permission is given so others can view or even edit items)
Proxy	Note: Some shared mailboxes (which include mail and calendar), are set up by admins and function more like a GroupWise proxy. Delegate (Initiated by owner; causes mail and calendar items to be sent by another “on behalf of” you. You can change the settings so they appear to be coming directly from you.)

Delegate



Your car

Not you, but behaves as if it's you behind the wheel—and the driver can do *anything* (if given permission).

Shared Mail or Calendar



Your car

You allow someone along for the ride to watch or do *one thing at a time*.

Accept Access to a Shared Calendar

Lesson 5

The screenshot shows the Microsoft Outlook interface. The top ribbon includes tabs for File, Home, Send / Receive, Folder, View, and Help. The Home tab is active, showing options for New Email, New Items, Delete, Archive, Reply, Reply All, Forward, Move, Rules, Unread/Read, Categorize, Follow Up, and Browse Groups. The left sidebar shows the navigation pane with folders like Inbox (14), Sent Items, Drafts (2), and a search bar. The main pane displays an email from Nathan Howell, dated Tue 5/7/2024 7:03 AM. The email subject is "You're invited to share this...". The body text reads: "You're invited to share this calendar. To insight-test04. Nathan Howell (nathan.howell@tncourts.gov) has invited you to view their Calendar. Click the Accept button." Below this, it says "I'd like to share my calendar with you" and "Nathan Howell (nathan.howell@tncourts.gov) would like to share an Outlook calendar with you." At the bottom of the email, a red box highlights the text: "You'll be able to see all details of events on this calendar." A red arrow points from this text to the "Accept" button, which is also highlighted with a red box.

When someone shares their calendar with you, you receive an email notification.

You must click **Accept** before you can access it.

The level of access is described.

View a Shared Calendar

Lesson 5

1

2

Items: 8

1. Click **Calendar** button, if needed.
 2. Under **Shared Calendars**, click the checkbox in front of the desired calendar name.
- Result:** The additional calendar appears to the right of your own calendar.

1. Click **Calendar** button, if needed.

2. Click **Share Calendar**.

3. Select the **Calendar** in the drop-down list.

4. Click **Add...** then select the person with whom you want to share your calendar (already selected here).

5. Select the appropriate **Permissions** radio button.

6. Click **OK**.

Result: The person will receive the email inviting them to **Accept** your calendar.

Send Calendar Info via Email (not sharing)

Lesson 5

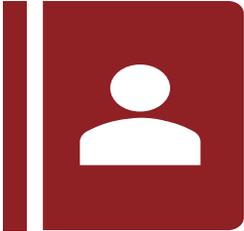
The screenshot shows the Microsoft Word interface with the 'Insert' tab selected. A red box highlights the 'Calendar' button in the ribbon, with a red arrow pointing to it from a blue box containing the number '2'. Below the ribbon, a 'Send a Calendar via Email' dialog box is open. A red box highlights the 'Date Range' dropdown menu, which is set to 'Today', with a red arrow pointing to it from a blue box containing the number '3'. Another red box highlights the 'Details' dropdown menu, which is set to 'Availability only', with a red arrow pointing to it from a blue box containing the number '4'. A third red box highlights the 'Advanced' section, which is expanded to show options, with a red arrow pointing to it from a blue box containing the number '5'. The 'Advanced' section shows three options: 'Availability only', 'Limited details', and 'Full details'. The 'Availability only' option is selected.

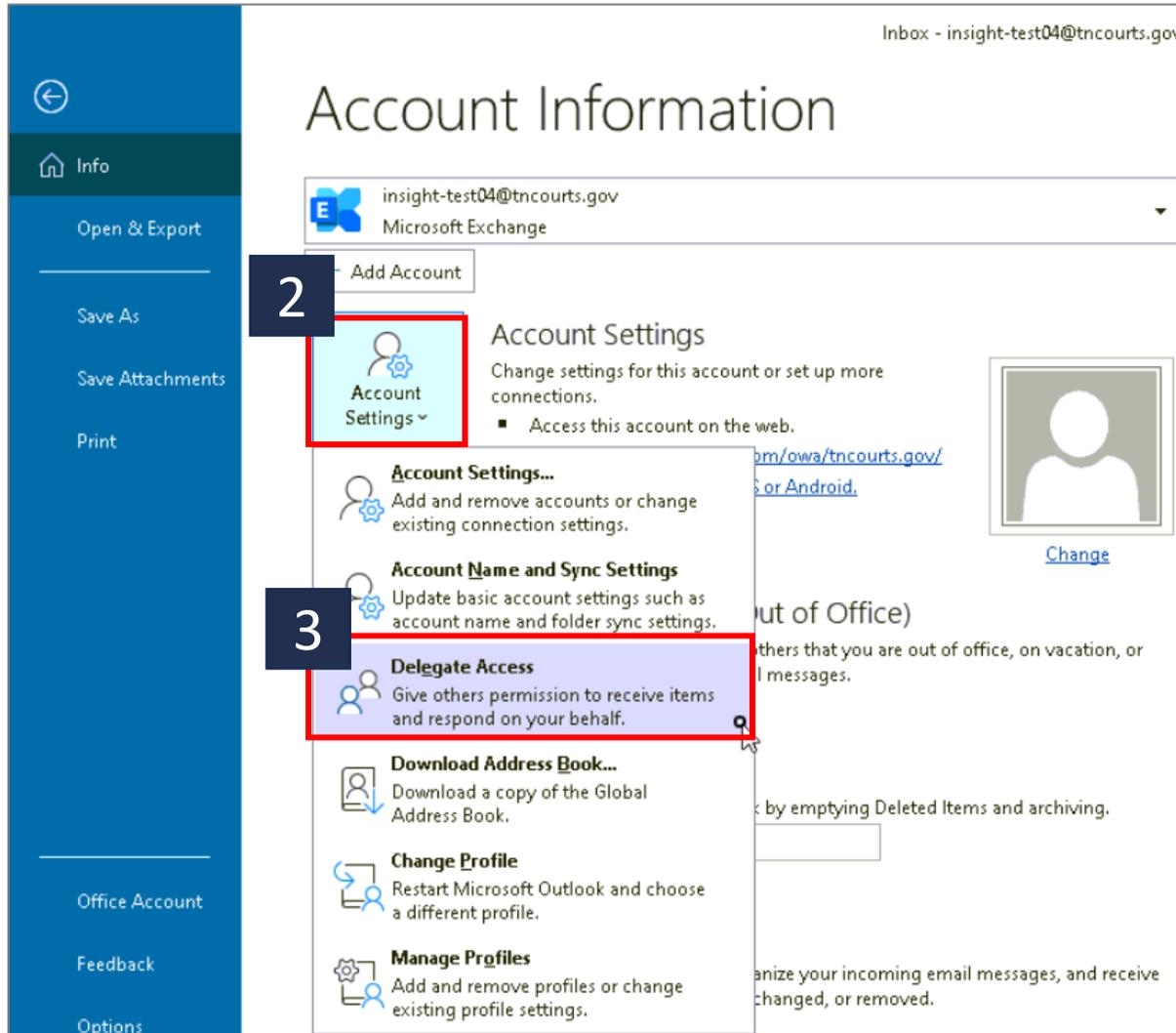
1. Open a new email.
2. Go to **Insert** → **Calendar**; a pop-up displays for the details.
3. Select the **Date Range** from the drop-down.
4. Use the **Details** drop-down to select the permissions.
5. Select **Advanced** options if necessary.
6. Click **OK** (not shown).
7. Complete the email with instructions to the recipient, because this email is their **ONLY** notification.

Note: Only dates in the range are included in the email.

Use delegation to enable someone to do things **on your behalf** so that incoming emails and meetings are sent from **your account**: “Sent by John Doe on behalf of Jane Doe.”

Delegation levels include:

Editor	Author	Reviewer
 <p>Complete control:</p> <ul style="list-style-type: none">• Read anything• Create, Edit, Delete anything, including items you created	 <ul style="list-style-type: none">• Read anything• Create, Edit, Delete items they create, but not yours	 <p>Read only</p>



1. Click **File** (not shown here).
2. Go to **Account Settings...**
3. Click **Delegate Access**.

Result: The **Delegates** popup window displays (see next page).

Delegate Mail and Calendar Access (3 of 5)

Lesson 5

Delegates

Delegates can send items on your behalf, including creating and responding to meeting requests. If you want to grant folder permissions without giving send-on-behalf-of permissions, close this dialog box, right-click the folder, click Change Sharing Permissions, and then change the options on the Permissions tab.

Nathan Howell

Add...

Remove

Permissions...

Properties...

Deliver meeting requests addressed to me and responses to meeting requests where I am the organizer to:

My delegates only, but send a copy of meeting requests and responses to me (recommended)

My delegates only

My delegates and me

Tip: As long as this first radio button is selected, you receive copies of invitations and responses so you can stay in the loop.

Delegate Permissions: Nathan Howell

This delegate has the following permissions

Calendar	Editor (can read, create, and modify items)
Tasks	None
Inbox	Reviewer (can read items)
Contacts	Reviewer (can read items)
Notes	None

Automatically send a message to delegate summarizing these permissions

Delegate can see my private items

OK

Cancel

4. Click **Add...**, then select the person to whom you want to delegate (using the Address Book, not shown here)

Result: The **Delegate Permissions:** [name you just selected] box appears.

5. Assign appropriate permissions to each of the following: Calendar, Tasks, Inbox, Contacts, Notes.
6. [Recommended]: Check the 1st check box, “Automatically send a message to delegate...”
7. Click **OK**.

Notice the Tip. It is important if you don't want to delegate to see your whole Inbox.

Delegate Mail and Calendar Access (4 of 5)

Lesson 5



FW: You have been designated as a delegate for insight-test04 - Message (Plain Text)

File Message Help

Delete Archive Reply Reply All Forward All Apps Quick Steps Move Tags Editing Immersive Translate Zoom Reply with Scheduling Poll Send to OneNote Viva Insights

You have been designated as a delegate for insight-test04

Nathan Howell
To: insight-test04
Cc: Wendy Wesley; Barrett Hobbs; David Thomas; michael.robinson@insight.com; josh.brown@insight.com

Start your reply all with: [Thank you!](#) [Got it, thanks!](#) [Received, thank you.](#) [Feedback](#)

From: insight-test04 <insight-test04@tncourts.gov>
Sent: Tuesday, May 7, 2024 12:54 PM
To: Nathan Howell <nathan.howell@tncourts.gov>
Subject: You have been designated as a delegate for insight-test04

This message was sent automatically by Microsoft Outlook to inform you that you have been designated as a delegate. You can now send messages on my behalf.

You have been given the following permissions on my folders:

Calendar:	Editor (can read, create, and modify items)
Tasks:	None
Inbox:	Reviewer (can read items)
Contacts:	Author (can read and create items)
Notes:	None

To open folders for which you have permissions, click the File Tab, and on the Open tab, click Other User's Folder. You will also be receiving copies of meeting requests sent to me and will be able to respond to them on my behalf.

You will be able to create and modify Meeting Workspaces on my behalf.

Modify or Remove Delegate (5 of 5)

Lesson 5

The screenshot shows the Outlook 'Account Information' page for 'insight-test04@tncourts.gov'. A red box highlights the 'Account Settings' link, with a '2' in a dark box next to it. Another red box highlights the 'Delegate Access' option, with a '3' in a dark box next to it. A blue arrow points from the 'Delegate Access' box to the 'Delegates' dialog box. The dialog box shows a list of delegates with 'Nathan Howell' selected. Below the list are buttons for 'Add...', 'Remove', 'Permissions...', and 'Properties...'. At the bottom of the dialog are 'OK' and 'Cancel' buttons.

1. Click **File** (not shown here).
2. Go to **Account Settings...**
3. Click **Delegate Access**.
4. Select delegate's name (if multiple).
5. Click **Remove** to remove the delegate altogether, or click **Permissions...** to modify permissions.

Share a Mail Folder (1 of 2)

Lesson 5

The image shows the Outlook interface on the left and the 'Outlook Today - [insight-test04@tncourts.gov] Properties' dialog box on the right. The dialog box has tabs for 'General', 'Home Page', 'Policy', and 'Permissions'. The 'Permissions' tab is active, showing a table of permissions:

Name	Permission Level
Default	None
Anonymous	None
Wendy Wesley	None

Below the table are buttons for 'Add...', 'Remove', and 'Properties...'. A red box highlights the 'Add...' button. Below that is another 'Permissions' section with a 'Permission Level' dropdown set to 'None'. Under 'Read', there are radio buttons for 'None' (selected) and 'Full Details'. Under 'Write', there are checkboxes for 'Create items', 'Create subfolders', 'Edit own', and 'Edit all'. Under 'Delete items', there are radio buttons for 'None' (selected), 'Own', and 'All'. Under 'Other', there are checkboxes for 'Folder owner', 'Folder contact', and 'Folder visible' (checked). A red box highlights the 'Folder visible' checkbox, which has three exclamation marks next to it. At the bottom of the dialog are 'OK', 'Cancel', and 'Apply' buttons.

Numbered steps are indicated by arrows:

1. Right-click the mail folder in the left pane.
2. Click 'Folder Permissions' in the context menu.
3. Click 'Add...' in the 'Permissions' tab of the dialog box.
4. Select a user (e.g., 'Wendy Wesley') from the list.
5. Select a 'Permission Level' (e.g., 'None') and check 'Folder visible' in the 'Other' section.

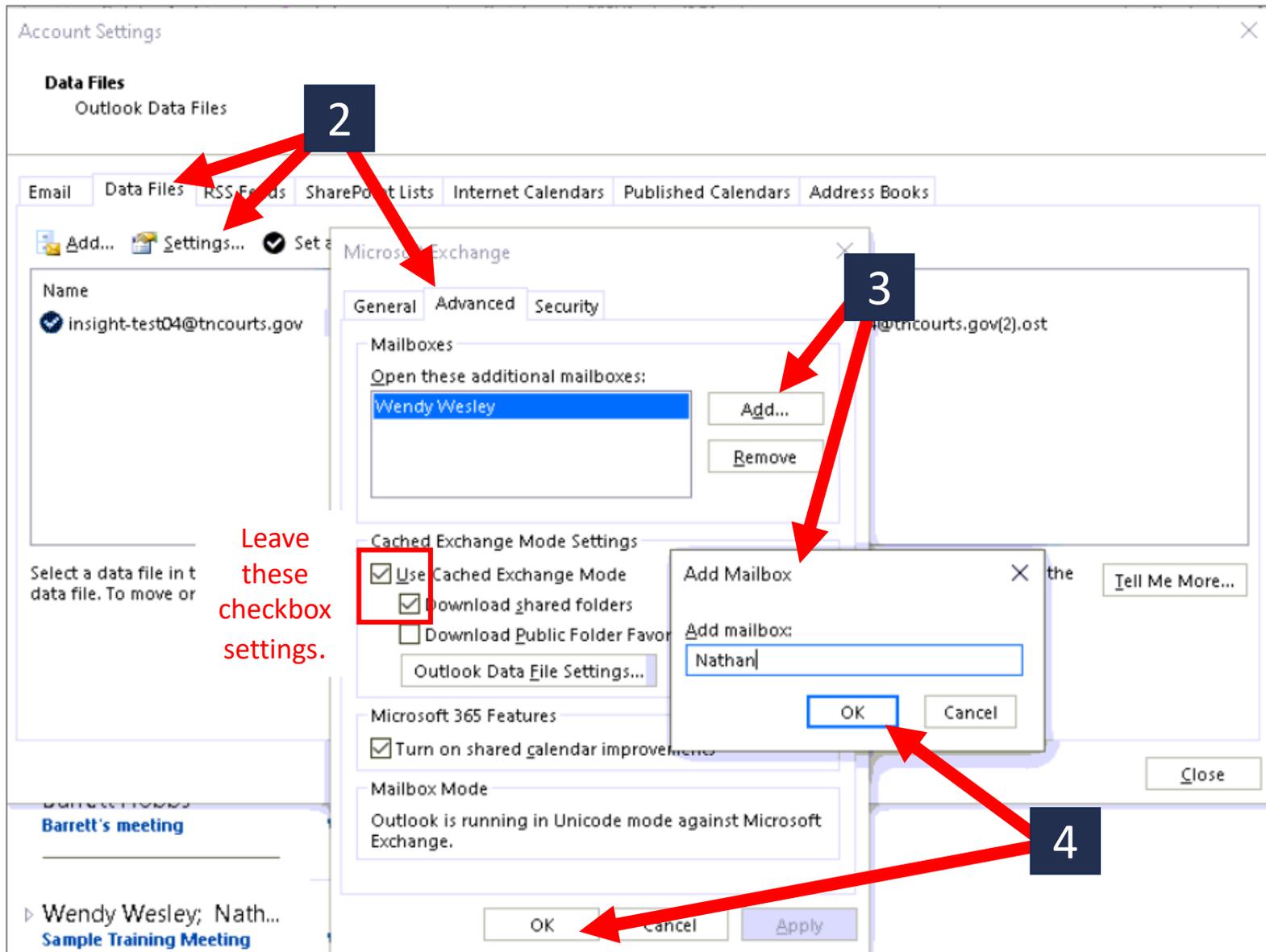
To get the process started:

1. In **Mail**, right-click the folder with your name.
2. Click **Folder Permissions**.
3. Select existing or **Add...** new contact; then select that person.
4. Select a **Permission Level** (which comprises various presets) OR select desired **Read** and **Write** options.
5. Make sure **Folder visible** is checked.

Note: Additional steps are required. See *Sharing a folder in Outlook* support document on [migration landing page](#).

Access a Shared Mail Folder (2 of 2)

Lesson 5



Note: Users do NOT receive email notification that a folder was shared with them. They must complete these steps:

1. Click **File** → **Account Settings** → **Account Settings** (not shown).
2. Click **Data Files** → **Settings** → **Advanced**.
3. Click **Add...** and type name of user who shared their mail folder with you.
4. Click **OK** and **OK** again.

Note: Additional steps are required. See *Sharing a folder in Outlook* support document on [migration landing page](#).

When to Request a Shared Mailbox

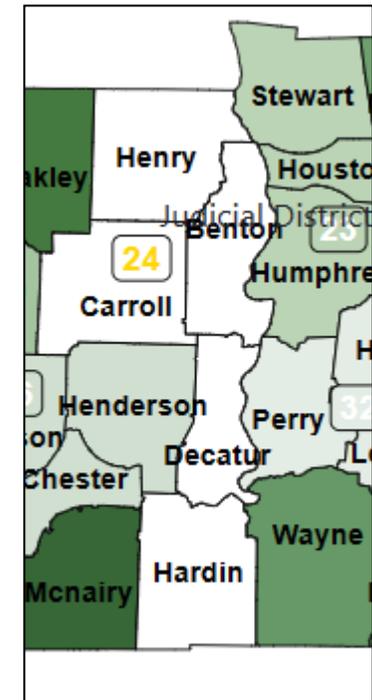
Lesson 5

In the following situations, ask an IT admin to set up a shared mailbox:

- The shared mail/calendar is intended to help people coordinate access or communicate about a particular topic.
- The shared mail/calendar will be used by multiple people for a long time.
- Persons needing access may change over time (revolving door) and you want it to be easy to update.



For example, the 5-county district 24 needs to share judge(s)' calendars to coordinate docket scheduling.



Knowledge Check



Which of the following best describes the difference between **sharing** a calendar or mail folder and **delegating** account permissions?

- A. Sharing is permanent. You can never change it or remove it. Delegation can be removed.
- B. Sharing only allows viewing; users cannot edit. Delegation allows editing or authoring.
- C. Sharing is nice when you have a large bag of M&Ms.
- D. Delegation enables you to assign multiple or even all permissions at the same time.

Objective: At the end of this lesson, you will be able to describe . . .

- Where you can access support resources
- How to contact IT support after you migrate
- Reminder regarding events leading up to migration



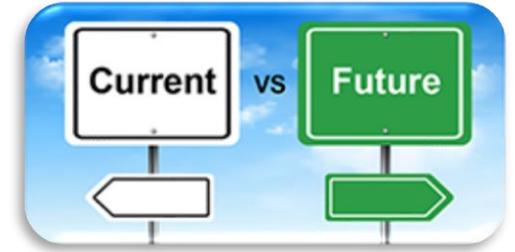
What's Changing?



Stop:
Using GroupWise after you migrate.

Continue:
Using GroupWise Messenger.

Start:
Using Outlook for all calendar, email, and contact management.



TN Courts Support Resources

Visit <https://tncourts.gov/microsoft-migration> (password: L4wtech24) to access the following:

- **AOC-specific Outlook training videos** (four, about 5 min each)
- This training PowerPoint as a PDF
- Outlook Basics job aid (3 pages)
- Outlook Rules and Delegation job aid (2 pages)
- How to install iPhone/Android Outlook app
- FAQs (frequently asked questions)

How to contact IT support:

outlook365@tncourts.gov

800-448-7980

Microsoft-produced videos/support documentation

Email

[Create, send, and reply to email](#)

[Create an email signature](#)

[Send and receive email attachments](#)

[Recall or replace a sent email](#)

[Search and filter email](#)

[Set categories, flags, and reminders](#)

[Organize email by adding folders and moving email to folders](#)

[Set up email handling rules \(basic\)](#)

[Manage email with rules \(advanced\)](#)

[Delegate email and calendar access \(allow someone else to access and send emails and calendar invitations/responses\)](#) [no video]

Calendar

[Add a contact \(personal address book\)](#)

[Create a personal contact group \(personal distribution list\)](#)

[Overview of the Outlook Calendar](#)

[Create a meeting invitation or appointment](#)

[Share your calendar with one or more people and assign certain permissions](#)

[Use calendar categories and reminders](#)

[Create an additional calendar \(to separate appointments or to share\)](#) [no video]

[continued next page]

Microsoft-produced support videos and step-by-step documentation (continued)

Contacts

[Add a contact](#)

[Create a contact group](#)

Tasks

[Create tasks and a to-do list](#)

Mobile

[Use Outlook for mobile devices \(iOS and Android\)](#) (first in a series of links for mobile)

What's Next?

Lesson 6

- You receive an email notifying you of your specific go-live date.
- You are reminded of actions you must complete.
- You receive a reminder of your go-live date.
- You are directed to complete critical tasks you **MUST** do.
 - **Reset password according to new standards**
 - **Set up authentication with a mobile device (text or phone)**
 - **Log into Microsoft 365 for the first time.**
- You log into Outlook with your new password.
- You receive a go-live Welcome email with support reminders.



GroupWise to Outlook Migration Course Summary



Now that you have completed this course, you should be able to describe:

- Outlook capabilities.
- How to send, receive, reply, and manage email.
- How to create and manage meeting invitations.
- How to delegate and work with shared calendars and mail (proxies).
- Where to access job aids, support documents, and IT support.
- What to expect in the coming weeks.



GroupWise to Outlook Migration Course Summary



Q&A

GroupWise to Outlook Migration Course Summary



Thank you!

