

MS SharePoint 2013 – Connecting HealthBC-ObgynContacts

USE MS INTERNET EXPLORER VERSION 8 OR GOOGLE CHROME TO CONNECT TO MS SHAREPOINT
Experiences may vary depending on versions of Microsoft Office (MS Office 2010 used)

The Department Faculty & Staff Directory is available as an Outlook Contact List.
 The list is maintained in the Dept Admin Database. This data is be copied periodically (monthly/on demand) to SharePoint to facilitate easy sharing, communication, emailing & mailmerge capabilities.
Note : The lists should be used with discretion.

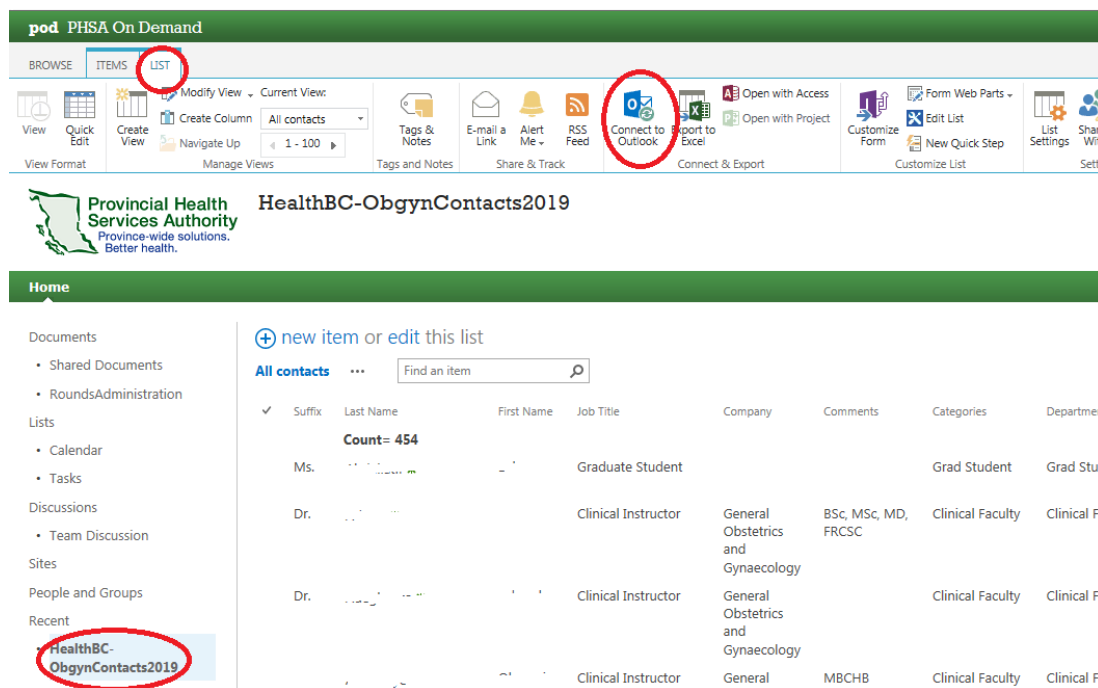
1. SharePoint Logins

The SharePoint site is common across ALL hospitals and is seamlessly tied to your hospital login.
 (See Helen to obtain access)

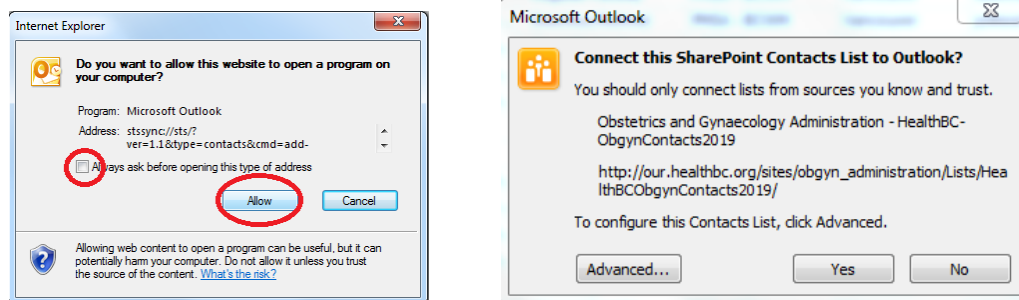
http://our.healthbc.org/sites/obgyn_administration/Lists/HealthBCObgynContacts2019/AllItems.aspx

2. Connect to Outlook

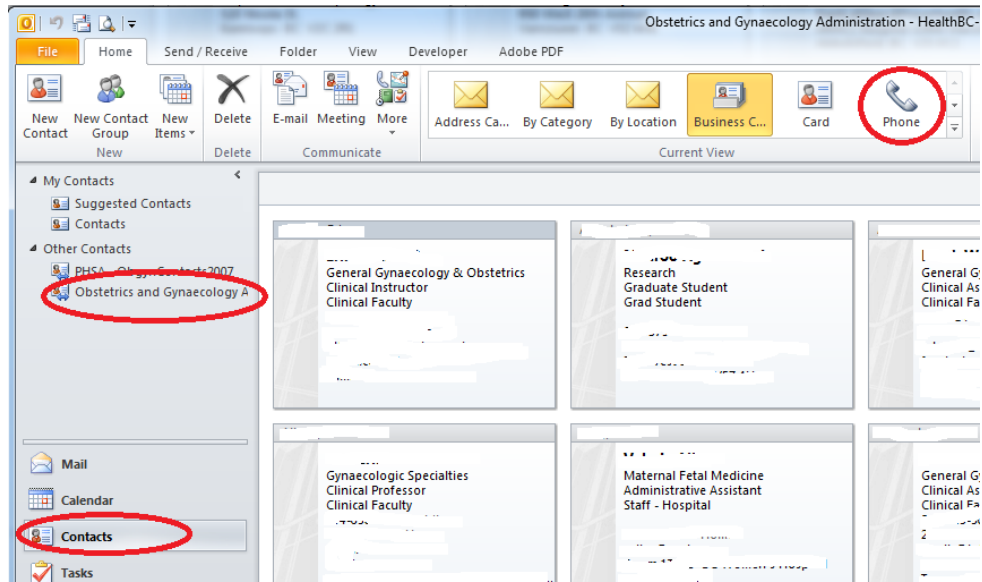
Click on List : 'HealthBC-ObgynContacts2019'



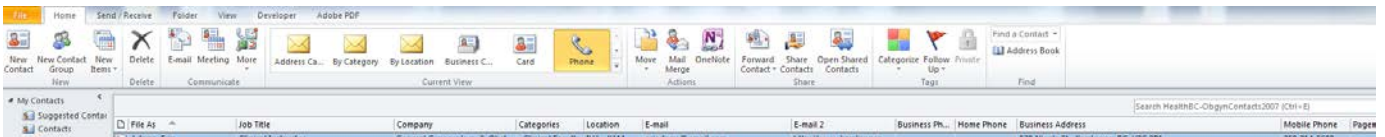
To attach to Outlook click 'Connect to Outlook', 'Allow' and answer 'Yes' to the following



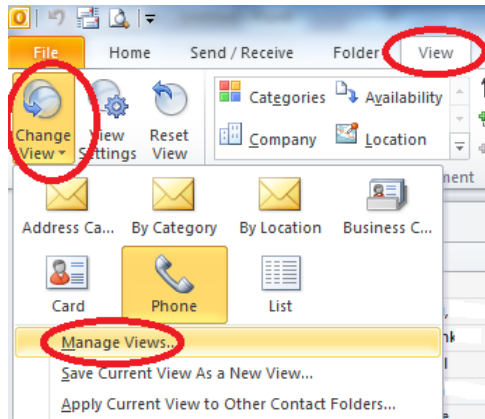
Within Outlook the list is **linked** as 'readonly' within 'Other Contacts'.
Note - When the SharePoint data is refreshed the list will automatically reflect those changes.
On opening Outlook the 'Other Contacts' are automatically linked.



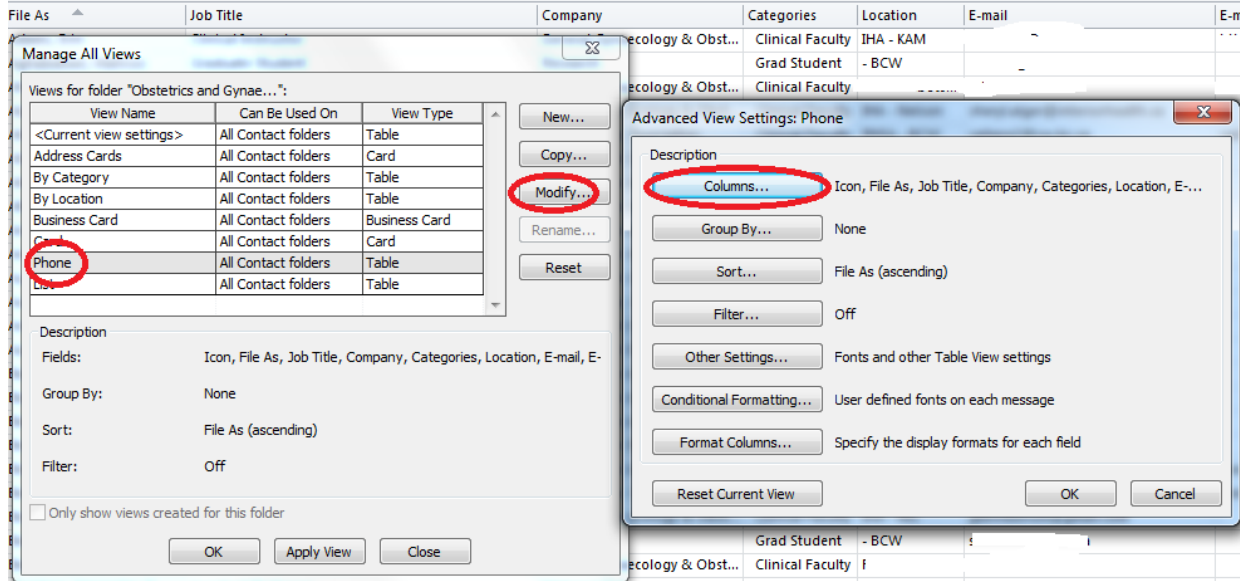
Click **Phone** to configure the Phone list as follows



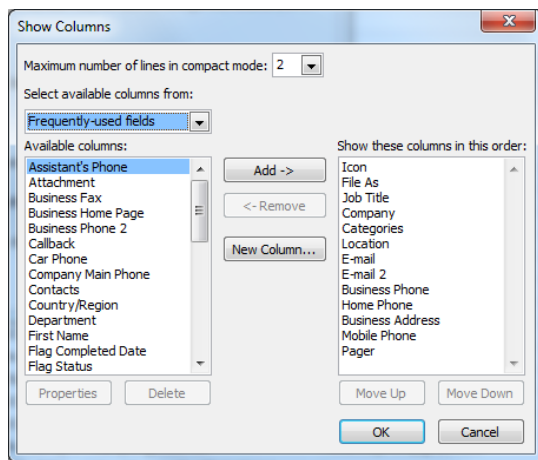
3. Outlook Contacts View Setup



Within Outlook you can 'Manage All/Current Views' to add & subtract the fields we are using. (See Appendix)



Select the data columns we have populated – sort by 'File As'



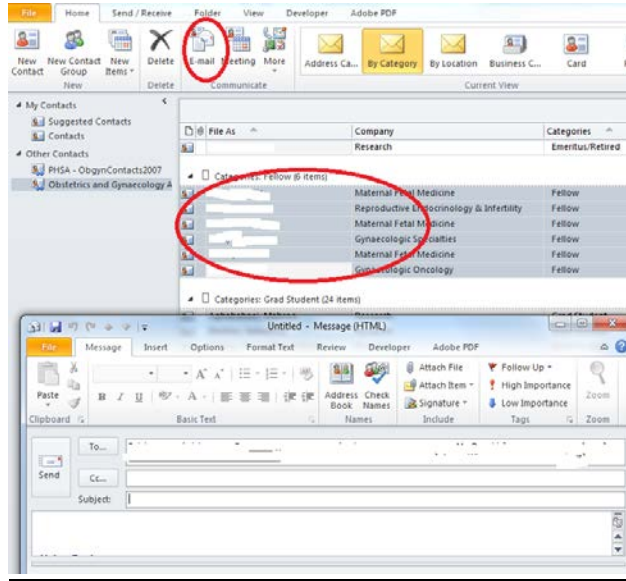
You can apply this view to Category & Location

4. Using Outlook To Email a group of people

Select Multiple people and click 'E-mail'

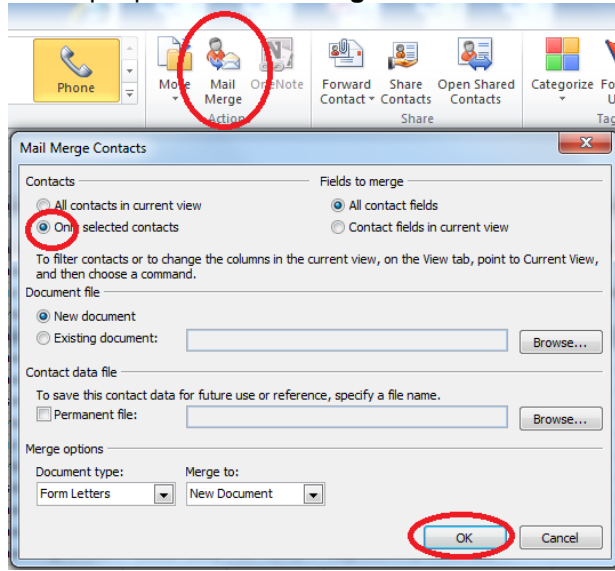
There is a max number of recipients (usually set within your Exchange Server environment – EMail Merge is recommended)

Note : The lists should be used with discretion.

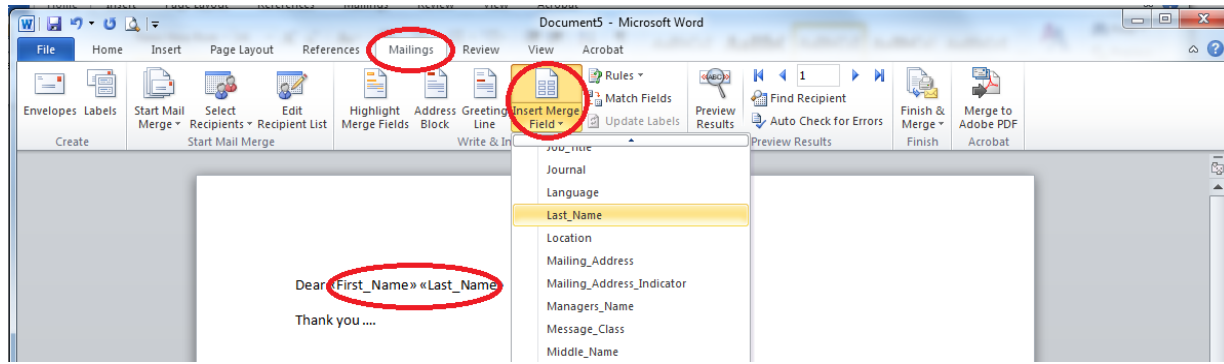


5. Using Outlook To EMailMerge a group of people

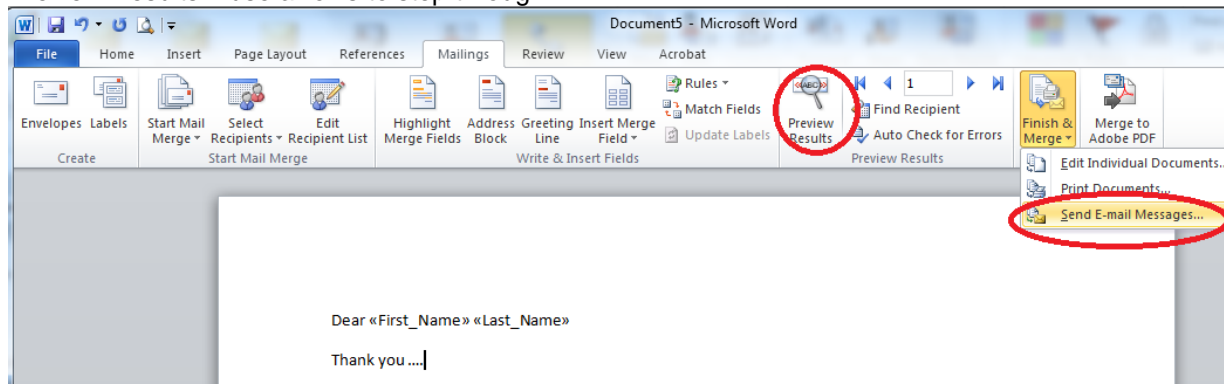
Select people click 'Mail Merge'



The fields available for mail merge are the same as shown in the Appendix.



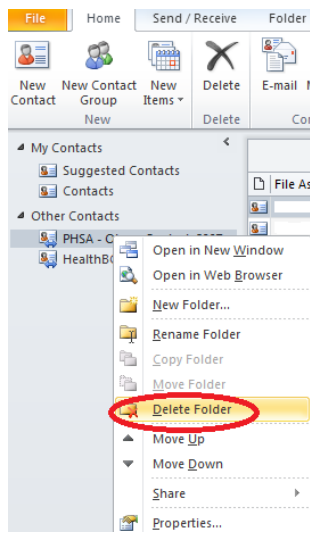
Preview Results – use arrows to step through



6. To Detach a Sharepoint List from Outlook

Please detach old lists.

Note: When the list is inactive – it will store a local copy in your Outlook which will be out of date.



Delete will detach the list from your 'Other Contacts' view (but does not delete the original)
(Note you can also Rename)

Appendix

Website Contact Data Fields	Sharepoint Fields	Outlook 2007 Differences
Salutation	Suffix	
Last Name	Last Name	
First Name	First Name	
Title (eg Professor, Fellow..)	Job Title	
Division/Dept	Company	
Credits	Comments	??????
Role (eg Clinical Faculty, Staff, Resident)	Categories	Categories available? Department duplicate if Categories unavailable
Role (eg Clinical Faculty, Staff, Resident)	Department	Location available
Site (eg BCW,VGH..)	Location	
Primary Email	E-mail address	
Secondary Email	E-mail 2	E-mail 2 available
Secretary Telephone	Business Phone	
Direct Telephone	Home Phone	
Address1 + Address2	Address (2 lines)	
City	City	
Province/State	State/Province	
Postal/Zip Code	Zip/Postal Code	
Pager	Mobile Phone	
website ID Number	Organizational ID Number	Organizational ID Number available

bold/yellow items denote most obvious naming compromises

Outlook Features

Current Views can be configured in Outlook to include or exclude fields (eg Address Cards, Phone List, By Category).

To email a subset in Outlook - Select contacts -> Email

To mail merge a subset in Outlook - Select contacts -> Mail Merge

(use mail merge fields like <<Business_Address>><<Business_City>><<Business_...>> Dear <<First_Name>>)