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Note: When the list is inactive – it will store a local copy in your Outlook which will be out of date.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

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salutation</td>
<td>Suffix</td>
</tr>
<tr>
<td>Last Name</td>
<td>Last Name</td>
</tr>
<tr>
<td>First Name</td>
<td>First Name</td>
</tr>
<tr>
<td>Title (eg Professor, Fellow..)</td>
<td>Job Title</td>
</tr>
<tr>
<td>Division/Dept</td>
<td>Company</td>
</tr>
<tr>
<td>Credits</td>
<td>Comments</td>
</tr>
<tr>
<td>Role (eg Clinical Faculty, Staff, Resident)</td>
<td>Categories</td>
</tr>
<tr>
<td>Site (eg BCW,VGH..)</td>
<td>Department</td>
</tr>
<tr>
<td>Primary Email</td>
<td>Location</td>
</tr>
<tr>
<td>Secondary Email</td>
<td>E-mail address</td>
</tr>
<tr>
<td>Secretary Telephone</td>
<td>E-mail 2</td>
</tr>
<tr>
<td>Direct Telephone</td>
<td>Business Phone</td>
</tr>
<tr>
<td>Address1 + Address2</td>
<td>Address (2 lines)</td>
</tr>
<tr>
<td>City</td>
<td>City</td>
</tr>
<tr>
<td>Province/State</td>
<td>State/Province</td>
</tr>
<tr>
<td>Postal/Zip Code</td>
<td>Zip/Postal Code</td>
</tr>
<tr>
<td>Pager</td>
<td>Mobile Phone</td>
</tr>
<tr>
<td>website ID Number</td>
<td>Organizational ID Number</td>
</tr>
</tbody>
</table>

### Sharepoint Fields

- **Appointment**: Organizational ID Number available
- **Account Information**: Organizational ID Number available

### Outlook 2007 Differences

- **Appointment**: Categories available?
- **Account Information**: Department duplicate if Categories unavailable
- **Account Information**: Location available
- **Account Information**: E-mail 2 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>>)