

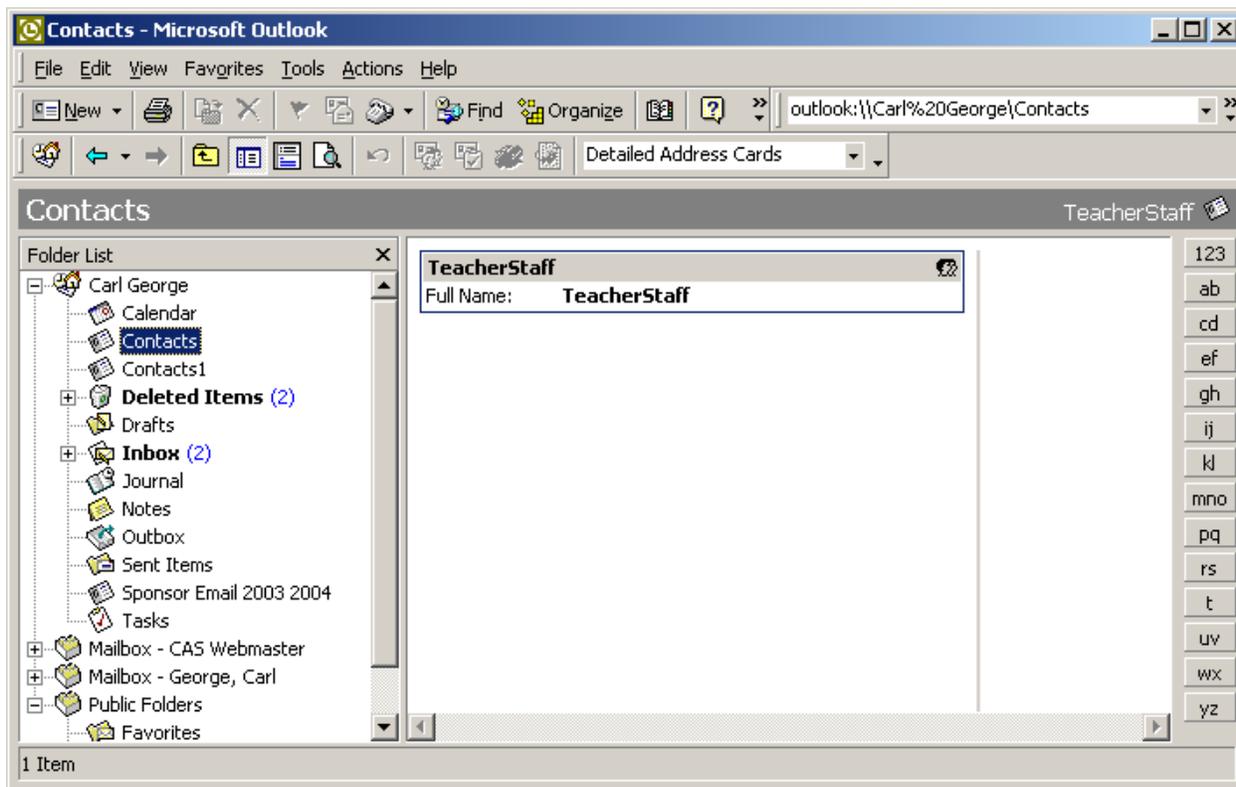
## How to Get Win School and Outlook to Talk to Each Other

### Objective 1. Import Win School contact information into Outlook.

**Requirement.** You need to have access to Win School Universal Access data files. Every time the Win School clerk runs Universal Access for those pesky monthly extracts, there are a plethora of files created in the C:/WinSchl/UADATA directory. You need the dbase file called **STUDDemo.DBF**. This database file contains most of the contact information relating to *students* in the database; if you need all the contact information for sponsors, spouses, or stateside emergency contact information, you will need another file in the UADATA directory—**STUDCTCT.DBF**. If you are familiar with database programs, you can link the two together and create a master contact information database. For the purposes of these instructions, only basic student and sponsor information will be addressed.

### Process.

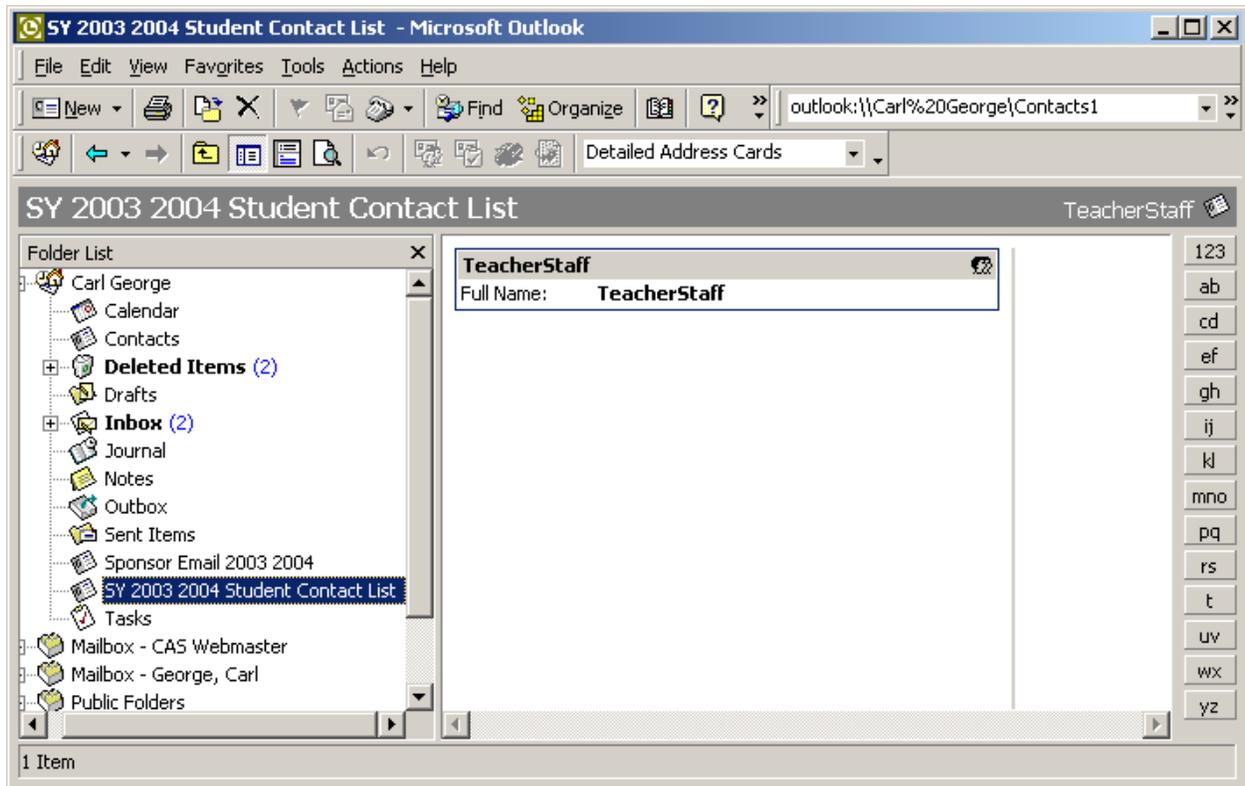
1. Open Outlook and make sure that the Folder View is checked under the View menu.



Find the Contact Folder and make a duplicate. To do this, right click on Contact folder and select **Copy Contacts**. Outlook will then ask where you want to copy the new contact folder to.

I elected to put it the root section of my personal folders. In the above screen shot, the duplicate Contact list is called **Contacts1**.

I recommend that you now right click and rename *Contacts1* something different, such as *SY 2003 2004 Student Contact List* so you don't inadvertently copy information from the database file into the original Contact folder. I have renamed the file in the next screen shot to this new name. (highlighted)



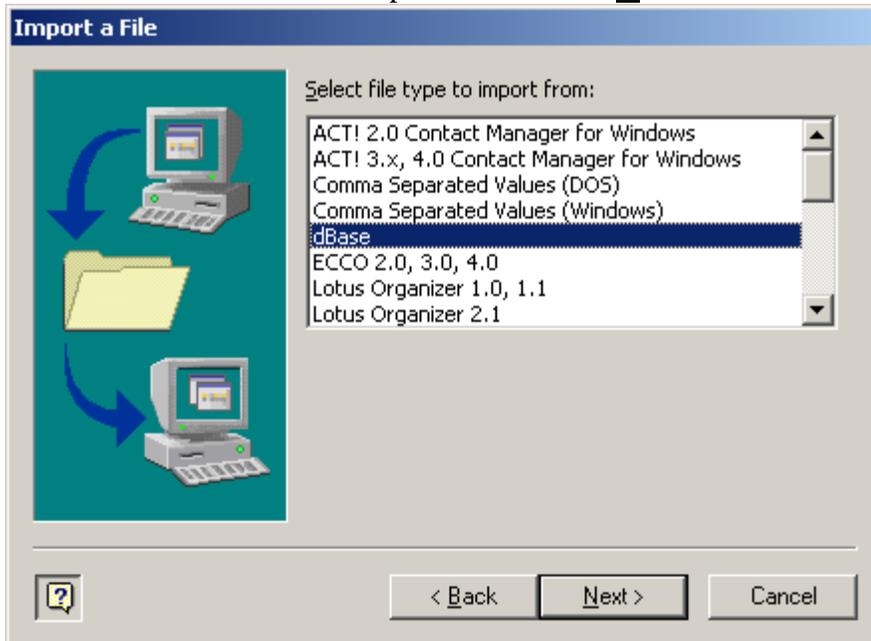
3. Importing the Win School Information in Outlook. Make sure that you have an updated version of STUDDemo.DBF. Make sure that you new Contact folder is highlighted like above.



Select **File > Import and Export > Import from another file or program** (next screen shot).

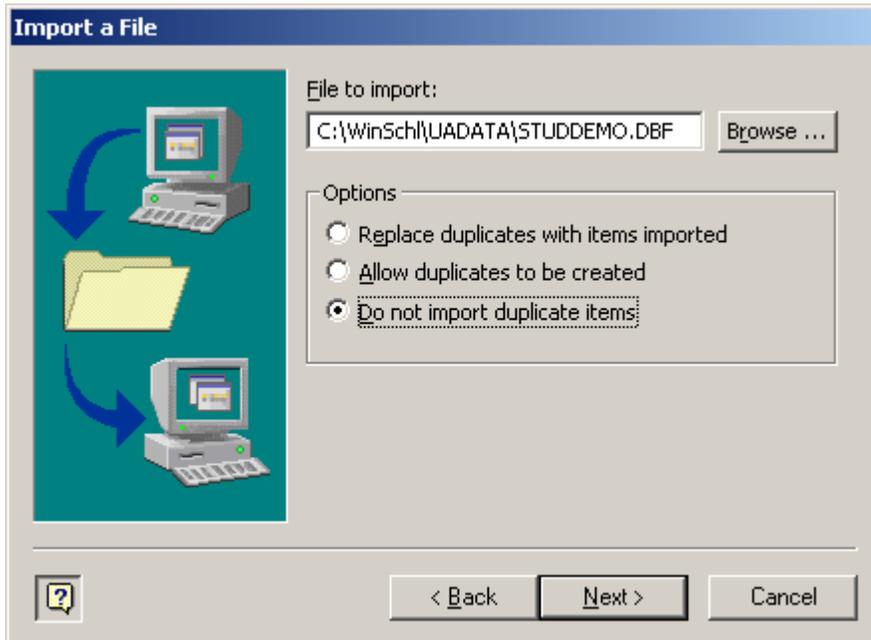
Click on the **Next** button

Select **dBase** from the listed options. Click on **Next** button.

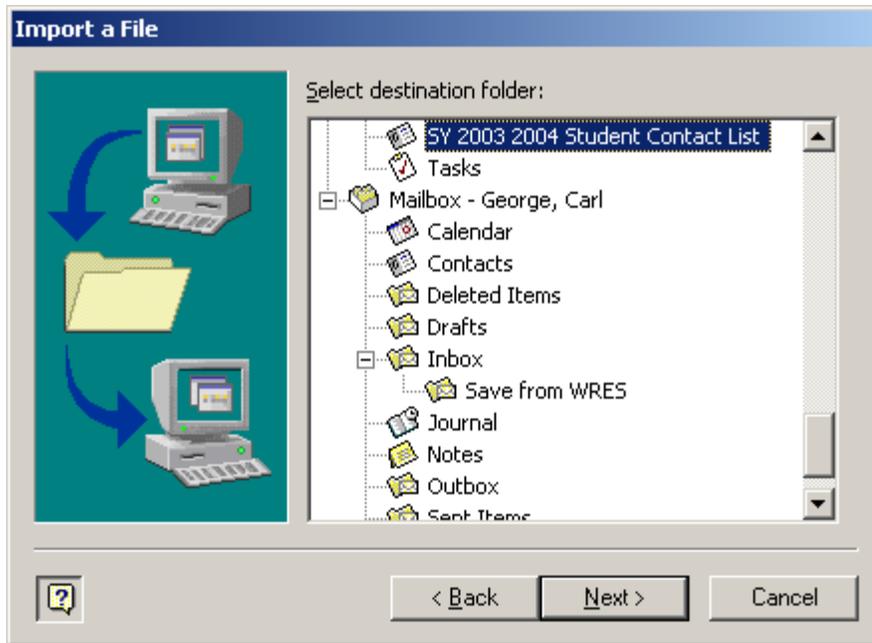


Locate the dBase File to import. In this example, I am pointing to the WinSchl directory. If this

is your first time through, you can select any of the radio button options, such as Do not import duplicate items.



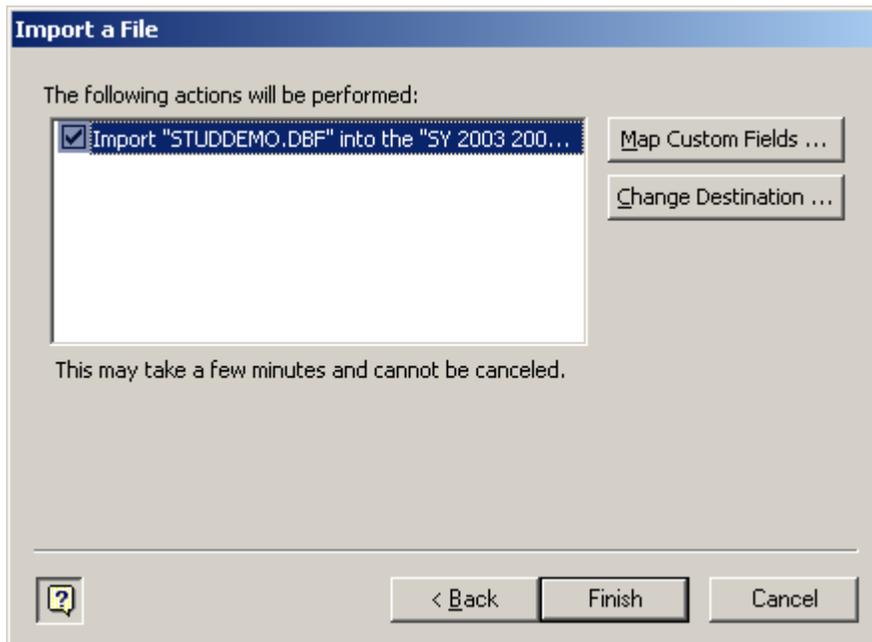
Click on the **Next** button.

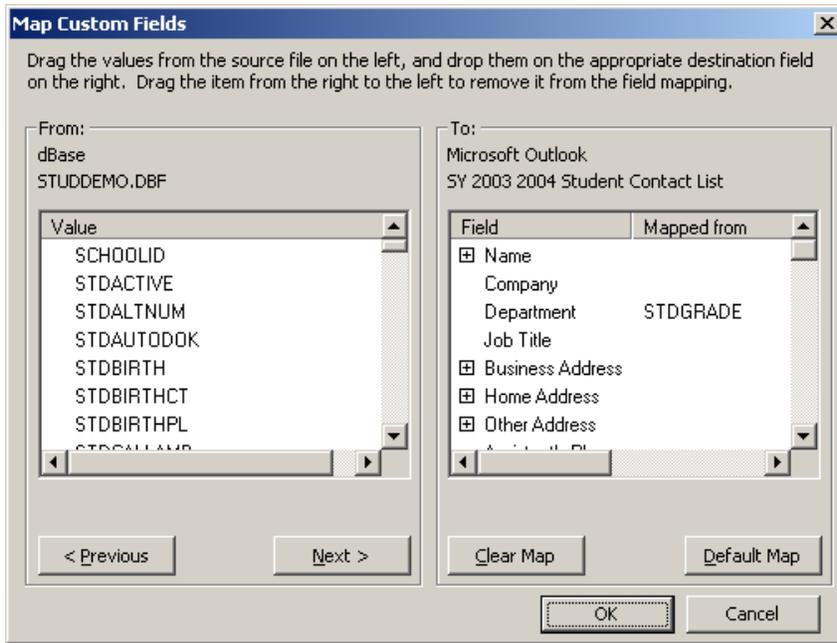


Make sure that you have selected the new Contact List folder.

Click on the **N**ext button.

4. Mapping the Fields. The next is entirely technique as you can import a lot of information into Outlook. Click on **M**ap Custom Fields





The fields from the dBase file are on the left and the standard Outlook contact fields are on the right side. The idea is to map the fields on the left to the ones on the right. Follow the instructions that says to drags the ones from the left and drop on the right. If you make a simple mistake, you don't have to Clear Map. You can select the item on the left again and drop on the correct field on the right. You can expand the Outlook options on the right by clicking on the + sign next to

the folder.

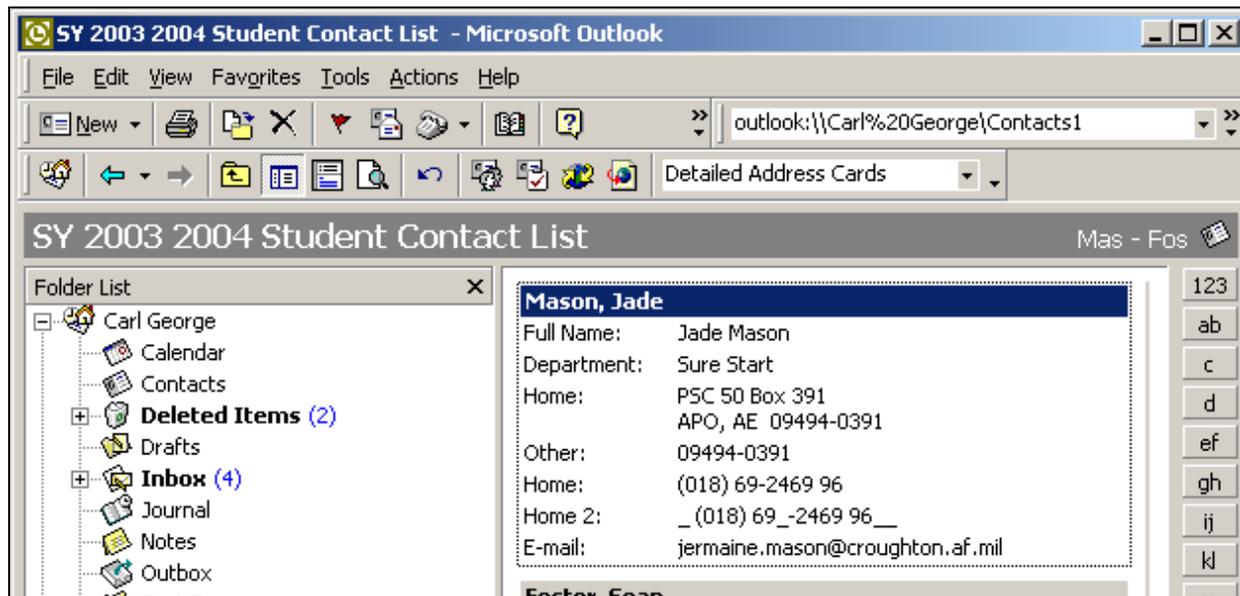
The WinSchool *Universal Access and District Extract* documentation has a complete list of all the field names and their descriptions; this will take the guess work on what each of the dBase fields really means. The dBase field names may be confusing, but here are the ones I would recommend mapping.

<b>DBase field</b>	<b>Outlook field</b>
STDGRADE (student grade)	Department. (this will allow you to sort by grade level)
STDFIRSTN (student first name)	First Name
STDLASTN (student last name)	Last Name
STDMADDR1 (mailing address e.g. PSC 50 Box 104)	Home Street
STDMCITY (APO or FPO)	City
STDMSTATE (AE)	State
STDMZIP (mailing zip)	Home Postal Code
STDHPHONE (home phone)	Home Phone
STDFLD27 (email address)	Email

When you are finished mapping all the fields you want, click the **OK** button. You will be returned to the previous menu. Click **Finish**. You can observe the process of importing the fields, which could take a long time if you are at a mega school.

By the way, once you have successfully mapped the fields, you don't have to redo all of the above steps when you need to update the master list. You have to run through the steps above, but the detailed mapping will be remembered from your previous session.

5. Viewing the Information. There are a number of views in Outlook for your Contact List. I have selected **Detailed Address Card**. You find this option on the top toolbar **View > Current View > Detailed Address Card**. It will display the contact information similar to this screen shot:



I used the **Department field** to display the Grade Level as Outlook didn't have grade level as a preset. If your contact list isn't sorted, you can do so by using the following **Customize View** option.

#### 6. Customize View Option.

From the top toolbar click on:

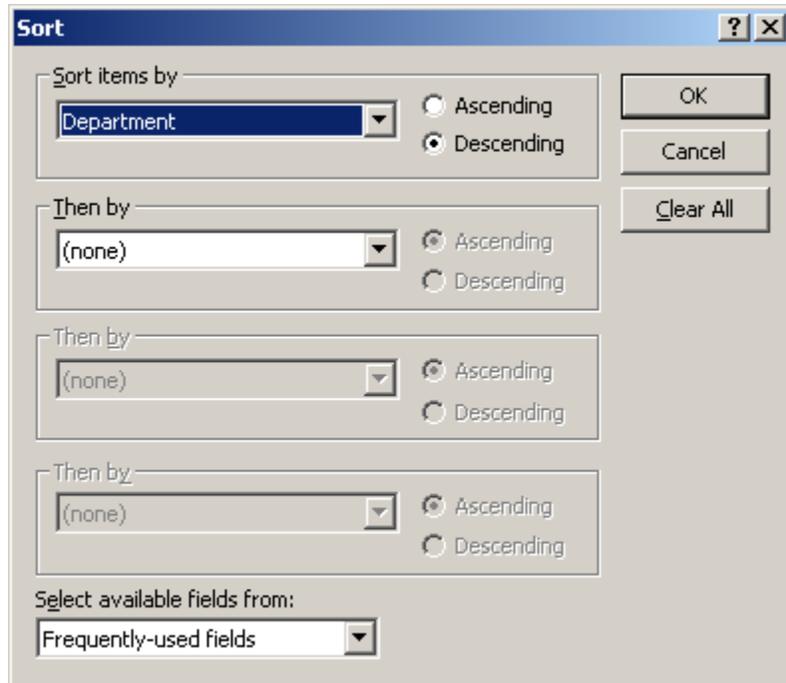
**View > Current View > Customize Current View.**

You will see this screen shot. Click on the **Sort** button to select the field(s) you want to sort on.

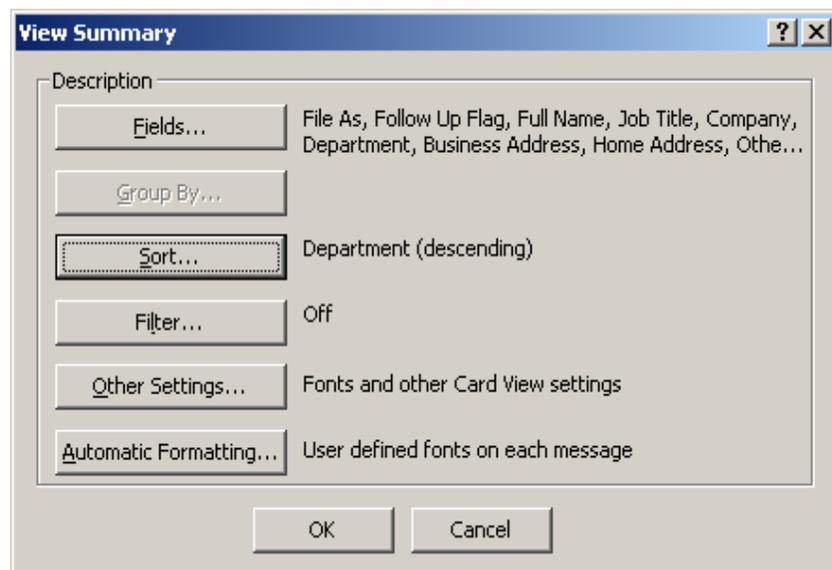


You can select the sort order you want to be displayed. In this example I have sorted by Department Only.

Click **OK** when done.



You will see your sort criteria next to the **Sort** button. Click on **OK** and your contact list should now be sorted.



7. Distributing the Contact List. Easiest way to distribute to everyone is copy/move the file from your Outlook personal folder to the school Public folders and provide your staff the instructions for copying this file back to their personal folders.

... or an alternate way—sharing folders.

8. Sharing Your Contacts. You can use this nifty tool to create shared web folders. The beauty of this is one person can be responsible for periodically updating the Outlook contact list that will automatically update information for everyone.

Please note that you can't share folders that are stored on the server, only personal folders. So your master contact list needs to be located in a personal folder, not a server folder.

Here's the instructions for the person distributing the master list.

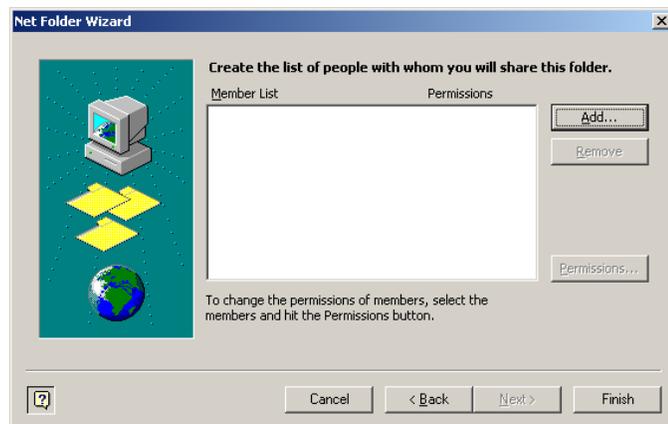
9. Once you have created the master contact list, click on **File > Share > Contacts**. You will get this screen.

Click on **Next**



10. Click on the **Add** button to select the recipients of the shared contact folder. **WARNING:** only include the people who need or are authorized the information. It is recommended that you use the Global Address List to select recipients and not your personnel contact folder.

When you click on the Add button, you will see the following screen.



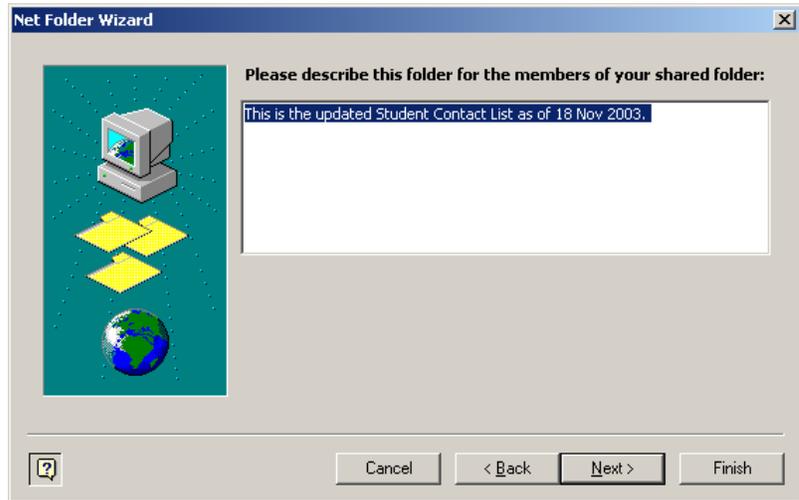
11. Here I selected the school principal and one other teacher to demonstrate. Unless you want a particular person to be able to update the list, leave everyone's permissions to **Reviewer** only.

Click on the **Next** button



12. In this dialog box you can put in a description of the shared folder.

Click on **Next** when done.



13. You are informed about how to make updates to the shared folder.

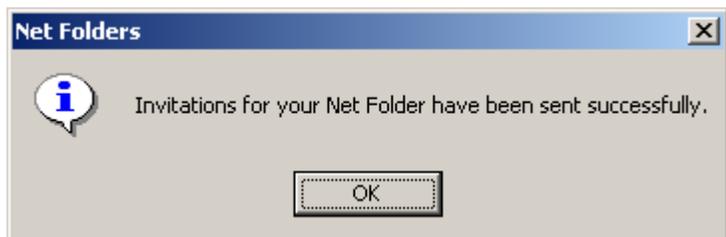
Click on **Finish** when done.



14. You will get a warning message that Outlook is trying to send an automatic email. Click on Yes to let Outlook do its thing.



15. Last screen is a notice that invitations have been sent out. Expect some phone calls here. Once the invitee accepts the invitation (and this is the scary part) Outlook starts



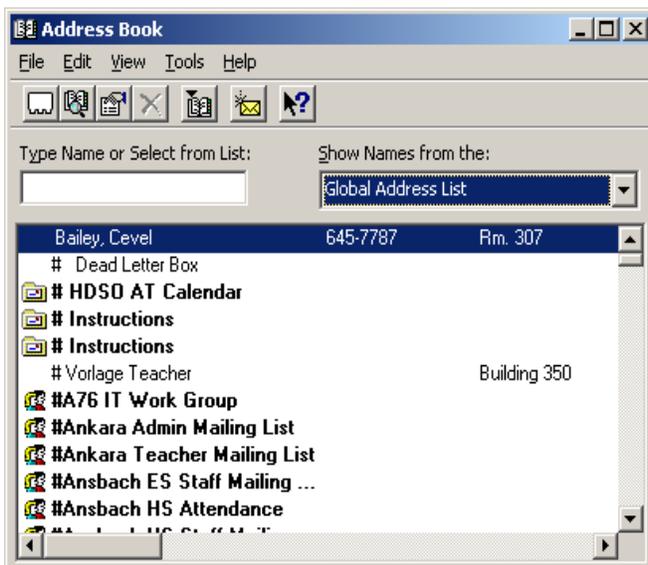
building them a contact list without their intervention. The beauty, again, is that whenever the list is updated, the contacts are automatically updated in everyone's contact list.

I've played around with this a bit here at Croughton, and I sent out a master list with all the students. Teachers were able to select and delete those students they didn't want. I then updated the list with a new entry and the teacher's list only included the new contact.

16. A Couple of Administrative Tools, Pointers. By *right clicking* on your newly created list and selecting Properties, you will see the following tabs.

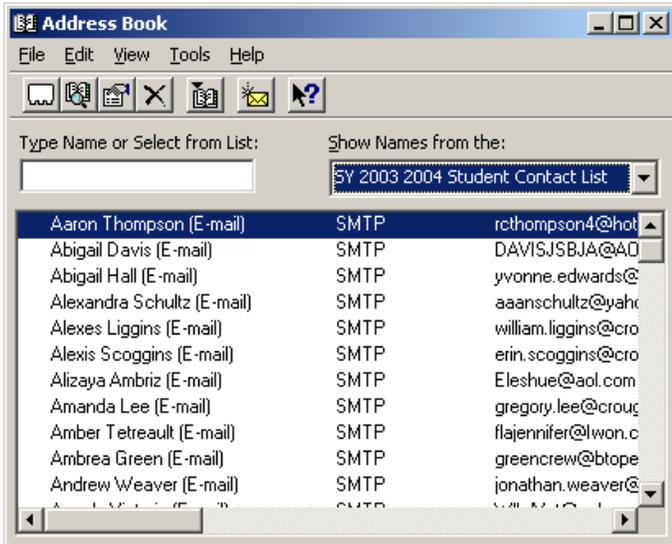


The Outlook Address Book tab has a tick mark for showing this as an email Address Book. If you don't check it and you try to use the *Check Name* function, Outlook won't find the contact information. So, I recommend checking the box.

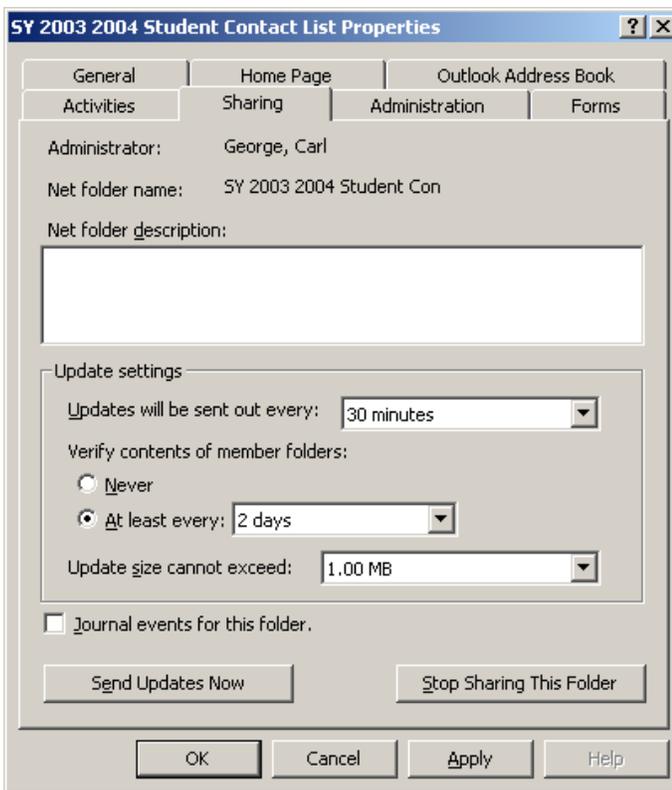


The new contact list will also not show up when selecting the master address book function or the *Check Name* function. So, you need to check this box.

Here is the master Address Book with the DoDDS generated Global Address List displayed in the right hand dialog box. If you have checked the box above designating your new contact folder as an email address book, you will be able to locate the address book by using the drop down menu and scrolling until you find your new list.



The next screen shot shows the new contact list and myriad of new names.



The next tab to be aware of is the Sharing tab. Here the person in charge of distributing the list can schedule when new updates will be sent out and also verify contents of member folders. They can also stop sharing the folder if need be.

Hopefully, this short tutorial has been beneficial. A special thanks to Pat Brew and Paul Watson (Menwith) for information on sharing contact folders. .