



How-To Guide

Creating & Using Contact Groups

Last updated: August 2010

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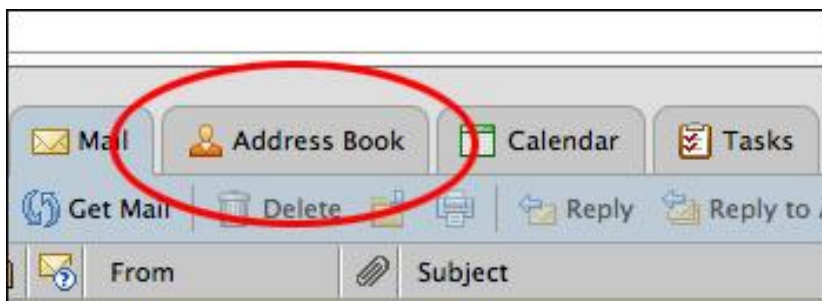
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Creating a Contact Group

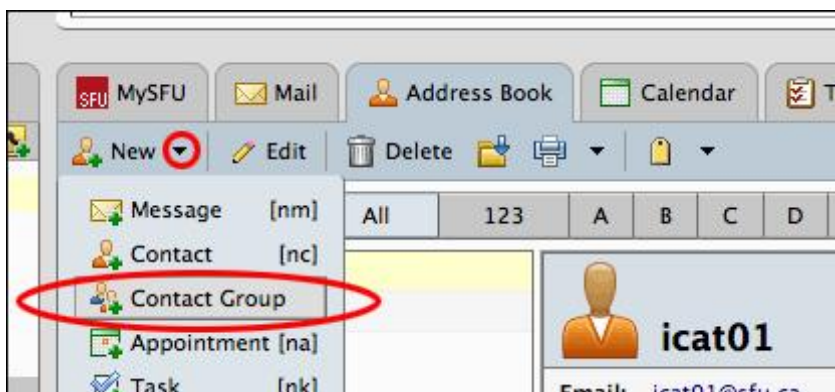
The 'New Contact Group' dialog box is shown. It has a 'Group Name' field, an 'Address Book' dropdown set to 'Contacts', and a 'Group Members' section. The 'Group Members' section has a search bar and a list of members. Below the list are 'Add' and 'Add All' buttons. At the bottom, there is a text input field for entering addresses comma-separated, with an 'Add' button.

Creating a Contact Group allows you to save a predefined set of attendees, i.e., if there is a group of people who you frequently invite to meetings, using a Contact Group means that you no longer have to type in each person in the 'Attendees' field every time a new meeting is created for that group.

1. Navigate to the Address Book in SFU Connect.



2. Click on the small arrow beside the 'New' button. Choose 'New Contact Group'.



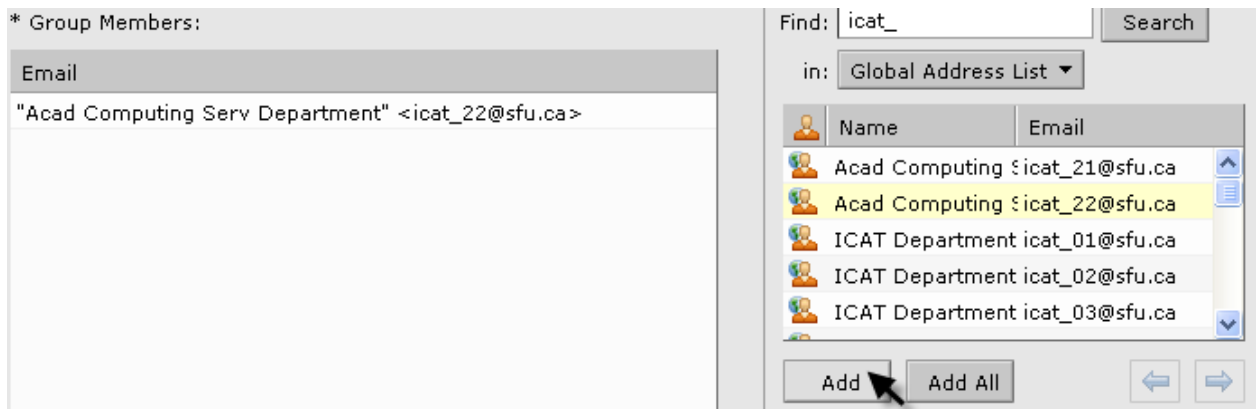
3. The New Contact Group menu should appear.

4. Enter a name for the Contact Group. The large Contact Group title will populate as you type.

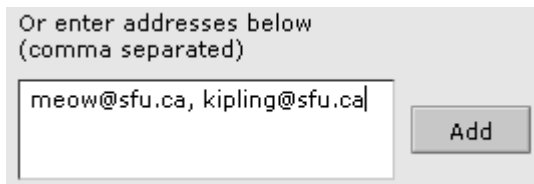
5. If you have more than one Address Book, choose the one in which you would like to create the Contact Group. Otherwise, leave it set to 'Contacts', which is your default Address Book.

6. In the Add Members to this Group section, type in the name of the people you would like to add to the group and click 'Search' to bring up a list of search results.

7. Select the person you would like to add and click the 'Add' button, and they should appear on the list on the left of the screen. You may also double click on the search result to add the person.



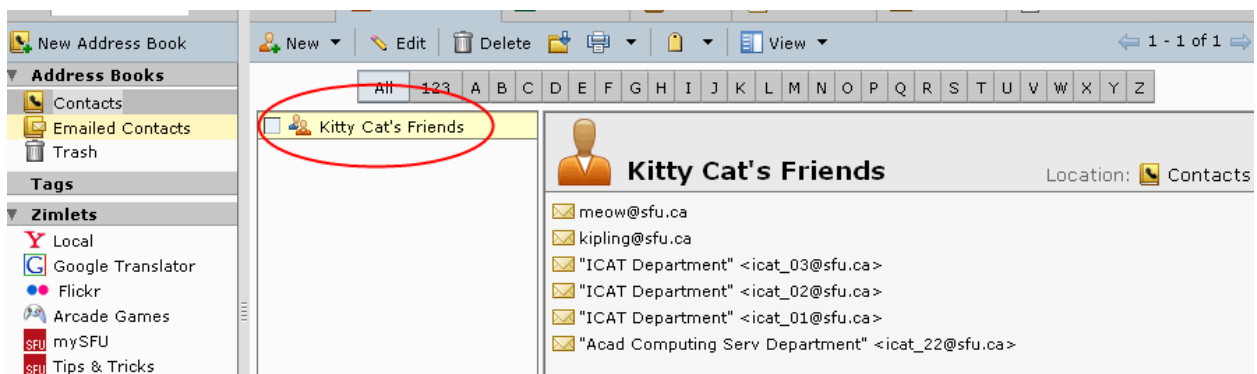
8. If you know the e-mail addresses of the people, you can also enter them in the following field, separated by commas. Click 'Add' to add them to your list on the left of the screen.



9. Once you have finished, click the 'Save' button at the top left of the screen.

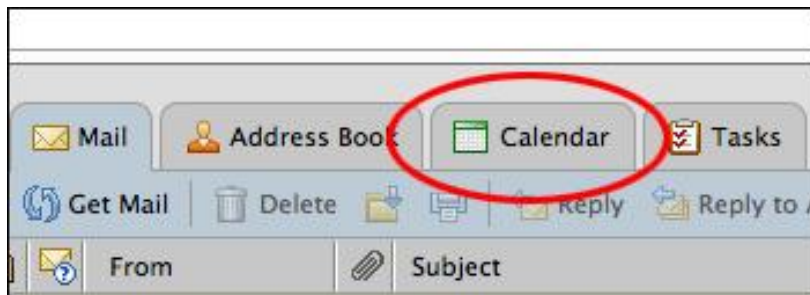


10. Your new Contact Group has now been created.

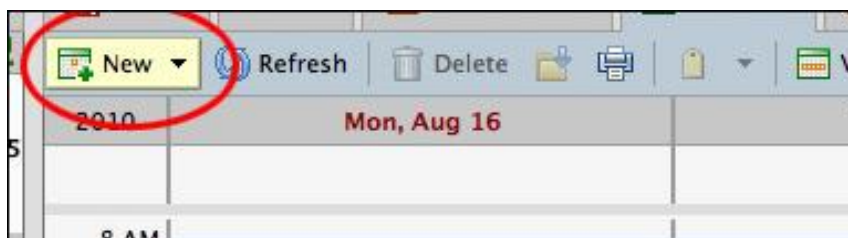


Using Contact Groups in your Calendar

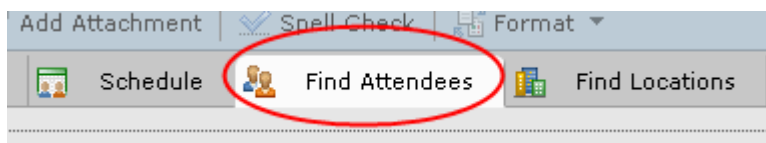
1. Navigate to the Calendar tab in SFU Connect.



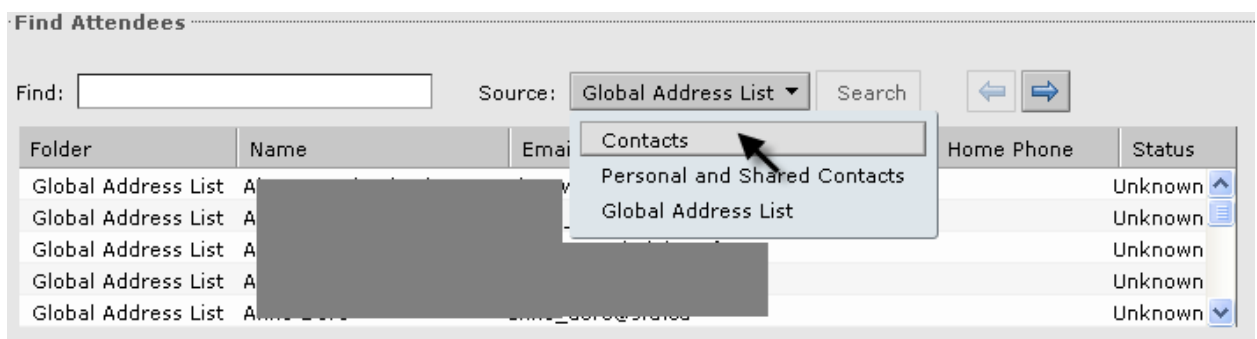
2. Click on the 'New' button near the top left of the screen to create a new appointment.



3. To add your new Contact Group, go to the 'Find Attendees' tab.



4. By default, the system pulls up an initial list of accounts in the system's Global Address List. Choose 'Contacts' for the Source.



- If you already have many contacts set up in your Address Book, you may need to perform a search for your Contact Group. Type in the Contact Group's name in the 'Find' field and click 'Search'.

Find Attendees

Find: Source:

- A list of matching search results will appear.

Find Attendees

Find: Source:

Folder	Name	Email	Work Phone	Home Phone	Status
Contacts	Kitty Cat's Friends				Unknown

- To add the Contact Group, you can double click on it. You may also select it and click the 'Add' button.

Folder	Name	Email	Work Phone	Home Phone	Status
Contacts	Kitty Cat's Friends				Unknown

- Once you have done this, you will see that all of the members of within the Contact Group have been added below in the 'Attendees for this Appointment' field.

Attendees for this appointment

Folder	Name	Email
Emailed Contacts	ICAT Department	icat_02@sfu.ca
Global Address List	ICAT Demo	icat_demo@sfu.ca
Global Address List	ICAT Department	icat_sh1028@sfu.ca
Global Address List	ICAT ICAT	icat_icat@sfu.ca
Global Address List	ICAT Labs	icat_labs@sfu.ca

- If you wish, you can remove individual attendees by selecting the contact and clicking on the 'Remove' button. Again, you may also double click to remove that contact. (Note: Doing either of these will remove the contact from this particular appointment; it will not permanently remove the contact from your Contact Group in your Address Book.) The Contact Group members added to this appointment can also be seen in the Attendees field under the Appointment Details tab.

Add AllAddRemoveRemove All

Attendees for this appointment

Folder	Name	Email
Emailed Contacts	ICAT Department	icat_02@sfu.ca
Global Address List	ICAT Demo	icat_demo@sfu.ca
Global Address List	ICAT Department	icat_sh1028@sfu.ca
Global Address List	ICAT ICAT	icat_icat@sfu.ca
Global Address List	ICAT Labs	icat_labs@sfu.ca