

# Tips & Tricks for Using Microsoft Outlook 2003

VITA and Northrop Grumman are upgrading your e-mail services as part of the IT infrastructure transformation. This change increases your e-mail security, brings everyone onto the same network, and makes it easier for agencies to communicate with one another. It also offers new options and functionality, including online password resetting, e-mail encryption, a state employee e-mail directory and SharePoint services. Your new e-mail system is Microsoft Outlook 2003. This publication will help you use this software to efficiently manage messages, calendars, contacts, correspondence and task lists.

This Tips & Tricks guide will show you some of the most useful and important aspects of Outlook 2003. These include your new domain login, monitoring mailbox and messaging sizes, mailbox cleanup and creating your personal storage files for saving older messages.

## GETTING STARTED ON OUTLOOK 2003

### Logging On to COV Domain

The first time you log on to Windows, you will be prompted for your user name and password. Your password for this initial logon is the same password you used with your previous e-mail platform. You will be prompted to generate a new password at this time.



### Choosing a Profile

- ▶ Each time you open MS Outlook, you must choose whether you want to access your new e-mail profile (VITA Enterprise Messaging) or your former e-mail account (Default Outlook Profile).
- ▶ You will be able to access your former accounts to view archived e-mails, but you will no longer be able to send or receive e-mails from this account.



### Accessing Your E-mail from the Web

Use Outlook Web Access (OWA) to log in to your new mailbox from any computer connected to the Internet. Your user name and password for this service are the same as they are for your regular e-mail system. To access OWA, visit: <https://webmail.vita.virginia.gov/exchange>.

### Note: Outlook Security Measures Security Alert

▶ To help prevent virus replication, Outlook will not allow certain types of files (.exe, .vbs, .mdb) to be received or opened on your machine.

### Outlook Mailbox Specifications

- ▶ Each mailbox has a standard 100 megabyte (MB) size limit. You will receive a series of e-mail notifications as your mailbox nears this limit.
  - At 80 MB – daily alert messages that you are approaching the mailbox limit
  - At 100 MB – an alert message that you have reached or exceeded the mailbox limit and can no longer send messages
- ▶ File attachments limited to 10 MB

### Attachments

- » You can send or receive internal and external attachments **up to 10 MB**. If you attempt to send an oversized attachment, you will receive a message that reads: *"The message being sent exceeds the message size established for this user."*
- » Click Save on the Opening Mail Attachment dialog window to automatically save an attachment.

### Delete an attachment

To delete an attachment do one of the following:

- 1 Delete an attachment from the Attachments line
  - Right-click the attachment, then click Remove
- 2 Delete an attachment in a message you are creating
  - Click the attachment, then press Delete on keyboard
- 3 Delete an attachment from the message body
  - Click the attachment, then press Delete on keyboard
- 4 If the message is in rich text format
  - Place the cursor to right of the attachment, then Backspace twice
- 5 If an image from an HTML message
  - On the Edit menu, click Edit Message
  - In the message body, click image and press Delete on keyboard

You can reduce the size of your mailbox by following the steps above to delete attachments from messages you have received. You may want to save file attachments on your computer before deleting them from Microsoft Outlook.

# MANAGING YOUR FOLDERS

## Outlook Folders

Outlook has four main folders where information can be stored. To view these folders, click the collapse buttons (minus symbol) in the Folder List of the Navigation Pane to close subfolders. Click the open buttons (plus symbol) to open subfolders.

- 1 **Mailbox**—Reside on the server (100 MB size limit). The mailbox should contain day-to-day items (less than 1 month old). Do not create subfolders in the mailbox; this is not the area for saving long-term information. Follow your agency standard guidelines for storing e-mail. Reference your agency's policies for record retention for this standard.

- 2 **Personal Folders**—Reside on your agency designated server. These folders should contain items that you access on a regular basis – items 6-12 months old. Create as many folders in your Personal Folders as you need to manage your data. Follow your agency standard policies and procedures.
- 3 **Public Folders**—Contain contacts and calendars. They are available to designated individuals (those granted permission).
- 4 **Archive Folders**—Refer to your agency policies for record retention before configuring your archive folder.

# CREATING & SEARCHING YOUR FOLDERS

## Saving Items Locally - Creating Folders

To save messages to folders in a Personal Folder file for permanent storage, first create a data file and then create folders to organize your saved messages.

Create a data file (Personal Folder file):

- 1 Click File > New > Outlook Data File
- 2 With Office Outlook Personal Folders file (.pst) highlighted, click OK
- 3 Choose a folder location, type an appropriate name, click OK
- 4 Change the display name and set a password if necessary, click OK

Create a folder in the Personal Folder file:

- 1 Right-click the Personal Folder file, then click New Folder
- 2 Type a name for the folder, choose the appropriate folder contents; click OK
- 4 Move an item to a local folder by dragging it on top of the new folder icon

## Search Folders

Search Folders are virtual folders displaying messages that meet the specified criteria. Display messages with a particular word in the subject or from a specific person no matter what folder they actually reside in.

- 1 Click Mailbox or Personal Folders in the folder list
- 2 Click File > New > Search Folder
- 3 Click Create a custom search folder, click Choose
- 4 Type a name for the search folder
- 5 Click the Criteria button, complete the criteria, click OK
- 6 Accept searching your mailbox or click the Browse button to select an individual folder, click OK
- 7 Click OK (messages meeting the criteria are displayed)
- 8 Click the search folder in the folder list at any time to display an updated list of messages meeting the criteria

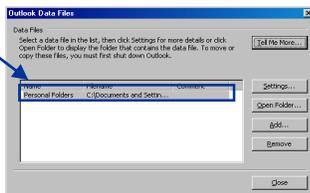
# ACCESSING SAVED E-MAILS

## Pointing to .pst file - Retrieving Saved (e-mail) data files

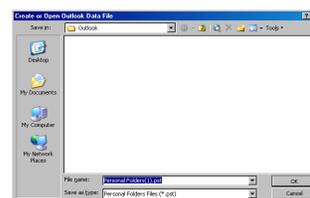
Point Outlook to .pst files of saved e-mail for retrieval and then save in desired location

Retrieving saved (e-mail) data files

- 1 Click Tools > Options
- 2 Select the Mail Setup Tab
- 3 Click Data Files ...
- 4 Click Add
- 5 Select Outlook Personal Folders File (.pst); click OK



- 7 Browse to find existing .pst file. (It most likely will be in the "My Documents" directory or search hard drive for the file. Do not create a new .pst file.)
- 8 After selecting existing .pst file, click OK
- 9 Continue to click OK until return to Outlook session
- 10 Close out of Outlook session and reopen for changes to take effect
- 11 Personal Folder now visible along the left pane of Outlook window (within default settings)



For additional information about the IT Infrastructure Partnership, visit: <http://www.vita.virginia.gov/>

# MANAGING YOUR CALENDAR

## Calendar

Use the calendar feature to store business and personal appointments and events. **Appointments** are activities with a specific start and end time; **Events** are activities that encompass an entire day—no specific start or end time. Use Outlook's categories and labels to sort your appointments into groups such as personal, business, phone calls, meetings and more.

## Scheduling an Appointment

Outlook allows you to create individual or recurring appointments.

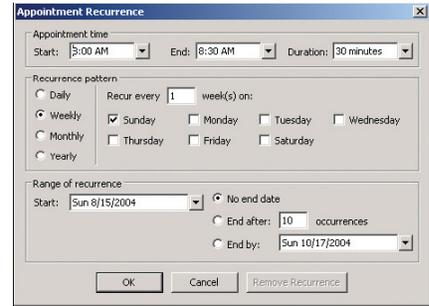
To create an appointment, click on Calendar.

- 1 Click New
- 2 Type a short description in the Subject field
- 3 Type a Start and End time
- 4 Use the dropdown arrows to choose a Date for your appointment
- 5 Use the dropdown arrows to choose the appropriate Show time options. This setting controls how others view your appointment.
- 6 Click Save and Close



## Recurring Appointments

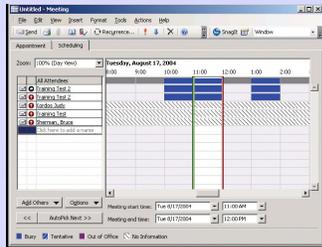
To create recurring appointments (daily/weekly/monthly/yearly), use Outlook's recurring appointment feature. To set a recurrence, open a new or existing appointment or event and click Recurrence on the toolbar. If a recurring appointment changes or is canceled, double-click to open the appointment. Outlook will prompt you to edit either this particular occurrence or the entire series of the recurring appointment.



## Planning a Meeting

The Meeting Request feature allows you to create an appointment and e-mail an invitation to potential attendees. The meeting organizer can check attendee availability prior to sending the request. Attendees can accept, decline or propose a new time for the meeting.

- 1 Click File > New > Meeting Request
- 2 Type attendee names in the To field; click To and choose attendees from the Global Address List
- 3 Type the appointment Subject and Location
- 4 Click the Scheduling tab to check availability. The Scheduler will display blocks of "busy time" on each attendee's calendar



- 5 Click Auto Pick to have Outlook select the first time when all attendees are available
- 6 Click Send to send the request



Colors indicate attendee availability (see key in lower left corner of Meeting window). Slashes indicate that there is no information for the attendee. Users outside the system will not have availability information in the Scheduler, but can be added to the Meeting Request to track their response to the e-mail invitation.

Accepting a Meeting Request invitation transfers the appointment from your Inbox to your Calendar automatically. Click Tools > Options > E-mail Options/Advanced Options to change this setting, if desired.

**In order to use Meeting Requests effectively, all team members must keep appointments up to date and use the Outlook Calendar to track Free and Busy time.**

# MANAGING THE SIZE OF YOUR MAILBOX

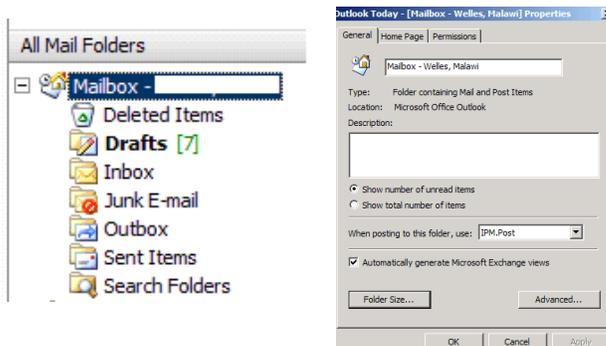
Mailbox size is determined by the size of the folders inside it.

- ▶ 1 megabyte (MB) = 1,024 kilobytes (KB)
- ▶ The standard mailbox capacity is 100 MB or 102,400 KB

## Determine Folder Sizes

Right click on your Mailbox in the Navigation Panel

- Click on Properties for "Mailbox" and the Outlook Today window appears
- Click Folder Size for a window that lists all folders and sizes in KB



## Using Search Folders to locate large messages

Use Search Folders in Outlook 2003 to find messages with large attachments. After you find an attachment, choose to delete it or save it to your computer.

Outlook 2003 includes a pre-defined Search Folder named Large Mail. To use this Search Folder, expand the Search Folders entry in the Navigation Pane for the mailbox you want to check, and then click the Large Mail Search Folder.

If the Large Mail Search Folder is not available, you can create it. In Mail, on the File menu, point to New, and then click Search Folder. Under Select a Search Folder, in the Organizing Mail section, click Large mail. By default, messages larger than 100 KB will be included in this Search Folder. To change the limit, click Choose to specify a new number.

The size of messages includes attachments and the message text itself. A message without attachments may be included in the Large Mail Search Folder because it contains embedded graphics or a large amount of text.

After deleting large items in Outlook, remember to empty the Deleted Items folder. You can move any Search Folder to the Favorite Folders section at the top of the Navigation Pane by right clicking the Search Folder, and then clicking Add to Favorite Folders.

## CREATING AN E-MAIL SIGNATURE

### Creating an E-mail Signature

To create an e-mail signature:

- 1 From the main Microsoft Outlook window, on the Tools menu, click Options, and then click the Mail Format tab
- 2 In the Compose in this message format list, click the message format that you want to use
- 3 Under Signature, click Signatures, and then click New
- 4 In the Enter a name for your new signature box, enter a name
- 5 Under Choose how to create your signature, select the option you want and click Next
- 6 In the Signature text box, type the text you want to include in the signature (you can also paste text into this box from another document)
- 7 To change the paragraph or font format, select the text, click Font or Paragraph, and then select the options you want. These options are not available if you use plain text as your message format
- 8 To add an electronic business card— vCard— to the signature, under vCard options, select a vCard from the list, or click New vCard from Contact
- 9 Click Finish when you are done editing the new signature

### Outlook Today

Outlook Today is an at-a-glance view of appointments, tasks and e-mail messages for the immediate future.

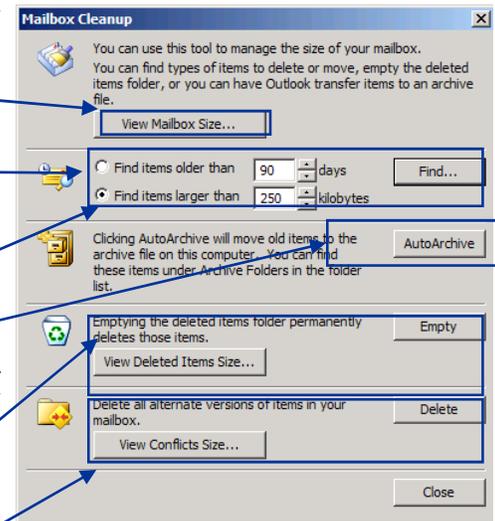
- » Click the Mailbox item in the navigation pane to display Outlook Today
- » Click Customize Outlook Today button to set it as your default startup page in Outlook or to change its appearance

## MAILBOX CLEANUP

### Mailbox Cleanup

You can manage the size of your mailbox to improve the overall performance of Microsoft Outlook. On the Tools menu, click Mailbox Cleanup. Do any of the following:

- 1 View the total size of your mailbox and of individual folders within it. Delete items no longer needed.
- 2 Find items older than a certain date. Delete items no longer needed
- 3 Find items that are larger than a certain KB size. Delete items no longer needed
- 4 Archive items using AutoArchive. Follow agency procedures for archiving. Call help desk for guidance.
- 5 View the size of your Deleted Items folder. Empty your Deleted Items folder.
- 6 View the size of your Conflicts folder. Delete your Conflicts folder.



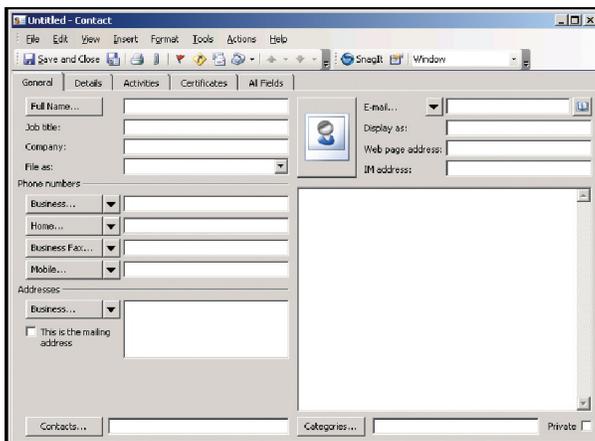
## CONTACTS

### Creating a Contact (to create public contacts: contact the help desk)

Contacts are in your personal e-mail address book.

To create a new contact:

- 1 In the Contacts folder, press Ctrl + N  
or From any other folder in Outlook, such as the Inbox, the shortcut is Ctrl + Shift + C or Click File > New Contact
- 2 Click the NEW button on the Standard toolbar
- 3 Double click a blank area of the Contacts pane
- 4 Drag and Drop other items from Outlook (e.g. E-mail, Task, Contact) onto the Contacts link on the Navigation Pane
- 5 Click Save and Close after you enter data about Contact



### Creating a Distribution List (to create a public distribution list: contact the help desk)

To quickly send an e-mail to frequently contacted groups of co-workers or clients without addressing it to each individual's e-mail address, create a personal distribution list.

- 1 Click the File menu > New > Distribution List
- 2 Enter the Name of the distribution list (something unique and memorable)
- 3 Click the Select Members button to select people from the COV Global Address Book or from your Contacts folder
- 4 Double-click each person to add them to the Member field at the bottom of the window, then click OK
- 5 If you would like to include individuals who are not in the Global Address List or your Contacts folder, click the Add New button to enter their names and e-mail addresses
- 6 Click Save and Close

After a Distribution List has been created, each time you create an e-mail with the Distribution List, the e-mail is sent to all members on that list.

## RECORDS RETENTION

You must follow Commonwealth of Virginia and your agency's records retention policies when keeping or deleting e-mail messages. Check with your agency's records retention officer or your supervisor if you have questions.