

# TIPS AND TRICKS for the Messaging Transformation: A NEW OUTLOOK...

**Contents**  
**Cover Page**  
 Logging On  
 Mailbox Information  
 Outlook Web Access  
 Outlook Today

**Inside Pages**  
 Mailbox  
 Help  
 Calendar  
 Distribution Lists

**Back Page**  
 Folders

One of the Virginia IT Infrastructure (VITA) Partnership's main objectives is to upgrade and replace your e-mail system by providing standard tools for managing your e-mail data. Your new e-mail system is Microsoft Outlook 2003. The tips and tricks in this publication will help you use your new software to efficiently manage your messages, calendars, contacts, correspondence and task lists.

## GETTING STARTED

### Logging On to COV Domain

When you Log On to Windows you are prompted for your User name and Password

**User name: first.name.lastname@agency.virginia.gov**  
**Password: your e-mail password**



**Your initial password is the same password you used with your previous e-mail system. When you log in you are prompted to change your password. If you experience problems, contact your local IT support for assistance.**

### Outlook Mailbox Information

Outlook Mailbox specification and limitations

- » Each Mailbox has a 100 MB size limit. You will receive an e-mail notification when your mailbox nears the limit (see back page for information about moving messages to another location to reduce mailbox size.)
  - :: At 80 MB – receive daily alert messages that you are approaching the mailbox limit
  - :: At 100 MB – receive an alert message that you have reached or exceeded the mailbox limit
- » Mail Folders (Inbox, Sent, Drafts, etc) have a 90-day retention policy (see archive section of this document)
- » File Attachments have a limit of 10MB
- » Public Folders follow agency standard size limits

### Outlook Web Access (OWA)

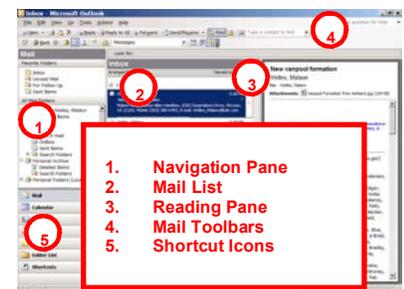
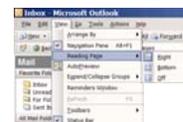
Use OWA to access your COV mail from any computer connected to the Internet. To access OWA go to: <https://webmail.vita.virginia.gov/exchange>

Your user name and password are the same as for the COV domain



### Default View

By default, all of Outlook's folders have a split pane view of information. Alter the default view by dragging a pane's border to resize or by using the View menu. View > Reading Pane >



1. Navigation Pane
2. Mail List
3. Reading Pane
4. Mail Toolbars
5. Shortcut Icons

### Choose Profile

» Each time employees open MS Outlook, they will need to choose whether they want to access their new e-mail profile (VITA Enterprise Messaging) or their former e-mail account (Default Outlook Profile)

» Employees have been given the option to access their former e-mail accounts to view archived e-mails

» Employees will have access to their former e-mail accounts for at least 90 days, but will not be able to send or receive e-mails from these legacy accounts



### Creating an E-mail

To create a new e-mail message

- 1 Click the new button on the toolbar or Keyboard shortcut – Ctrl + Shift + M
- 2 Type the recipients last name, spacebar, type first name in the To, Cc or Bcc field
- 3 Click the Check Name button to validate name



**The Auto complete feature remembers names you have already used. The name appears as you type, then press Enter to accept a highlighted displayed name.**

## Message Menu Icons



Message menu icons show the message type and the action you have performed on the message.

	Unopened message
	Opened message
	Replied to
	Meeting invite
	Forwarded message
	Contact
	Assigned Task

## Outlook Options

Outlook has several options for dealing with the appearance and management of your data. To set options for Outlook, click the Tools menu > Options. Options include:

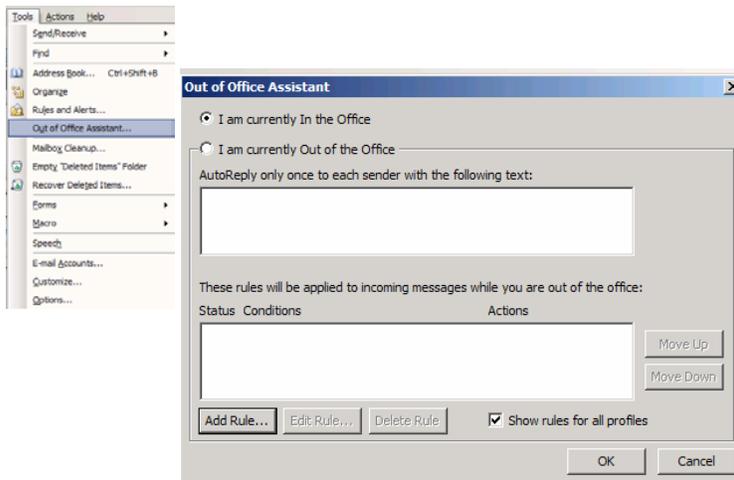
- » E-mail signatures
- » Spell check settings
- » Work hours and work week settings
- » Auto archive settings
  - :: Reading pane settings
- » Reminder settings for calendar appointments, flags and tasks
- » Formatting for messages and folders
- » Deletion settings

## Out of Office Assistant

When planning for office absences during normal working hours, such as vacations, use the Out-of-Office Assistant. Click Tools > Out of Office Assistant to set your message. Individuals who send you a message will receive your Out-of-Office message only once. You can set rules for incoming messages to receive your Out-of-Office notice.



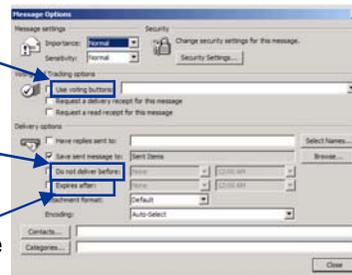
Inform colleagues when you will be unreachable by e-mail automatically using the Out of Office Assistant.



## Message Options

Before sending an e-mail message, click the Options button.

- » **Use voting buttons:** allows polling; the recipient simply clicks a button to send their reply
- » **Do not deliver before:** allows you to specify message delivery time and date. Outlook must be open for the message to be sent at the specified time
- » **Expires after:** allows a message to be deleted from the recipient's Inbox when it is no longer relevant—provided that it is unopened



## Attachments

You can send or receive internal and external attachments up to 10 MB. If you attempt to send an attachment larger than 10 MB 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.



### :: Security Alert ::

To help prevent virus replication, Outlook will not allow certain types of files (.exe, .vbs, .mdb) to be received.



## Additional Information and Resources

See Microsoft free online help for additional information.

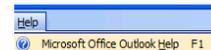
- <http://office.microsoft.com/en-us/outlook/HA010714981033.aspx>

For more helpful hints about Microsoft Outlook 2003 refer to:

- <http://office.microsoft.com/en-us/outlook/HA010714981033.aspx>
- <http://office.microsoft.com/en-us/outlook/FX100647201033.aspx?CTT=96&Origin=CL100626971033>

For assistance while in the Outlook application select the

- Help Menu and click Microsoft Office Outlook
- OR
- Click F1 key on the keyboard



Please be advised these links will change over time

# CALENDAR

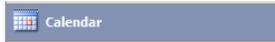
## Calendar

Use the calendar feature to store both business and personal appointments and events. **Appointments** are activities with a specific start and end time; **Events** are activities that encompass the 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 the Calendar button.

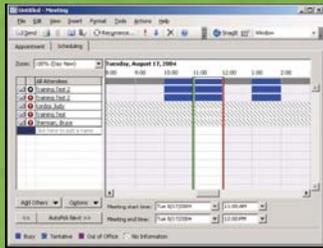


- 1 Click the New button
- 2 Type a short description in the Subject field
- 3 Type a Start and End time
- 4 Use the dropdown arrows to choose a Date for your appointment
- 5 Use the dropdown arrows to choose the appropriate Show time options. This setting controls how others view your appointment.
-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

## Planning a Meeting

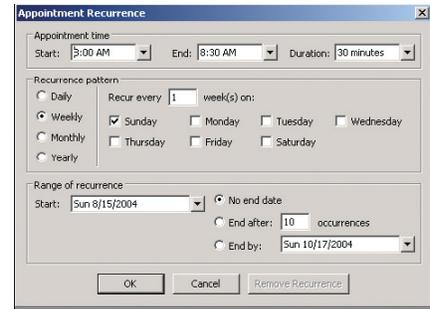
The Meeting Request feature allows you to create an appointment and e-mail an invitation to attendees. The meeting organizer can check attendee availability prior to sending the request. Attendees can accept, decline or propose a new time for the meeting.

- 1 Click File > New > Meeting Request
- 2 Type attendee names in the To field click the To button to 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 attendees calendar



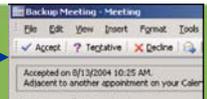
## Recurring Appointments

To create recurring appointments (daily, weekly, monthly or yearly) use Outlook's Recurring Appointment feature. To set a recurrence, open a new or existing appointment or event then click the Recurrence button 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.

- 5 Click the Auto Pick button 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. Non-COV attendees 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.**

# CONTACTS

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

Contacts are 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, for instance 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 co-workers or clients without addressing it to each individual person'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)
- 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
- 5 Click OK
- 6 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
- 7 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 the list.**

# MANAGING YOUR 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** — resides on the server (100 MB size limit). The Mailbox should contain day-to-day items (less than 1 month old). Any mail items (Inbox, Sent Items, Draft, etc) in the Mailbox that reach 90 days old will be permanently deleted. Do not create subfolders in the Mailbox; this is not the area for long-term saving of 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.
- 3 Public Folders** — contain contacts and calendars. They are available to designated individuals (those granted permission).\* if your agency has these folder
- 4 Archive Folders** — Refer to you agency policies for record retention before configuring your archive folder.

## Saving Items Locally - Creating Folders

Save messages to folders in a Personal Folder file for permanent storage. 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, and click OK
- 4 Change the display name and set a password if necessary, click OK

Create a folder in the Personal Folder file:

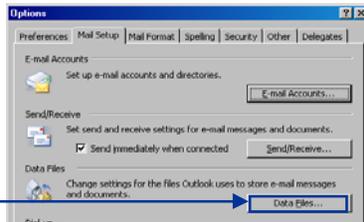
- 1 Right-click the Personal Folder file
- 2 Click New Folder
- 3 Type a name for the folder, choose the appropriate folder contents, Click OK
- 4 Move an item to a local folder by simply dragging it on top of the new folder icon.

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

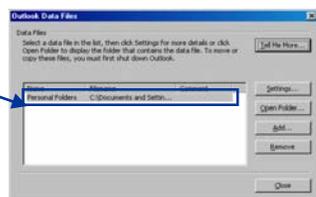
Point Outlook to .pst files of saved e-mail for retrieval and then save in desired location.

Retrieving saved (e-mail) data files

- 1 Click Tools > Options
- 2 Select the Mail Setup Tab
- 3 Click Data Files ... button



- 4 Click Add button
- 5 Select Outlook Personal Folders File (.pst),
- 6 Click OK

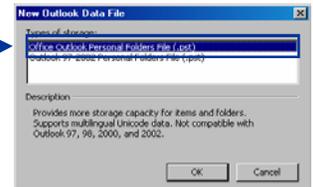


## Search Folders

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

- 7 Browse to find existing .pst file.  *(It will most likely 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 is now visible along the left pane of Outlook window (with in default settings)



## Steps to Download Pictures Automatically in Outlook

- 1 Open Outlook
- 2 Click on Tools menu
- 3 Select Options
- 4 Click on Security tab
- 5 Click Change Automatic Download button
- 6 Select when you want pictures to download

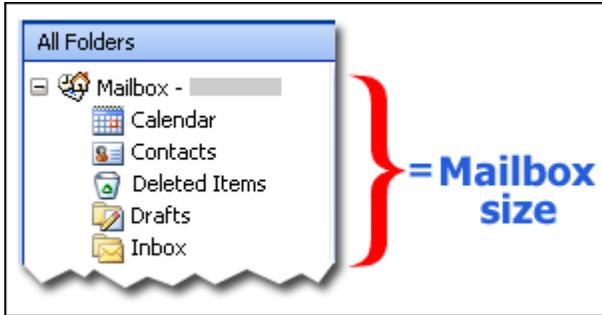


For additional information about the IT Infrastructure Partnership

- <http://www.vita.virginia.gov/>

# MANAGING THE SIZE OF YOUR MAILBOX

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



**1 megabyte (MB) = 1024 kilobytes (KB)**  
**The standard mailbox capacity is 100 MB or 102400 KB**

## Determine Folder Sizes

To determine folder sizes do one of the following.

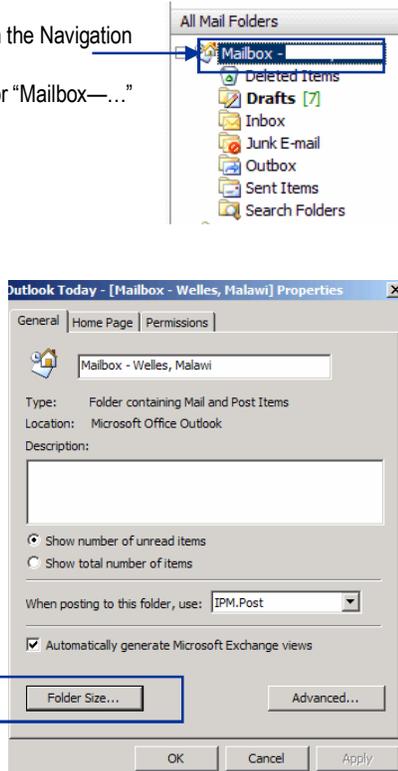
- Click on Folder List in the Navigation Panel.
  - Scroll down until you locate the Folder Sizes option
  - Click the Folder Sizes option for a window which lists all folders and size in KB.

- OR -

- Right click on your Mailbox in the Navigation Panel

- Click on Properties for "Mailbox—..."

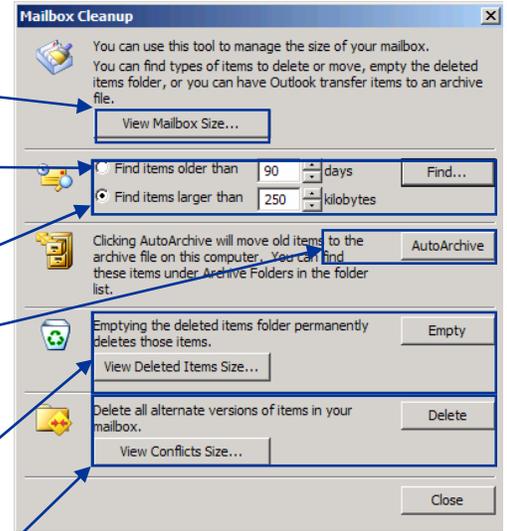
- The Outlook Today window appears
- Click the Folder Size button for a window which lists all folders and sizes in KB



## 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:

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



## Delete an attachment

To delete an attachment do one of the following

- Delete an attachment from the Attachments line
  - Right-click the attachment.
  - Click Remove
- Delete an attachment in a message you are creating
  - Click the attachment
  - Press DELETE key on keyboard
- Delete an attachment from the message body
  - Click the attachment
  - Press DELETE key on keyboard
- If the message is in Rich Text format
  - Place the cursor to the right of the attachment
  - Press BACKSPACE twice
- If an image from an HTML message
  - On the Edit menu, click Edit Message
  - In the message body, click the image.
  - Press DELETE key 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.

## Using Search Folders to locate large messages

Use Search Folders in Outlook 2003 to quickly find those e-mail messages with large attachments. After you find these attachments, you can decide which ones to delete or save to your computer.

By default, Outlook 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 kilobytes (KB) will be included in this Search Folder. To change the limit, click Choose to specify a new number, and then click OK.

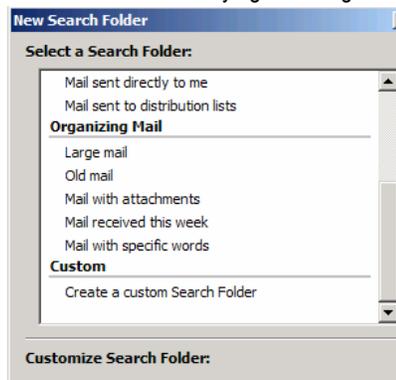
## MANAGING THE SIZE OF YOUR MAILBOX (continued)

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.

The new Search Folder is created in the Navigation Pane under Search Folders. You can rename the Search Folder by right-clicking the folder, and then clicking Rename.

After deleting large items in Outlook, remember to empty the Deleted Items folder. You may also want to compact your Outlook data file if you are using a Personal Folders file (.pst) (Personal Folders file (.pst): Data file that stores your messages and other items on your computer. You can assign a .pst file to be the default delivery location for e-mail messages. You can use a .pst to organize and back up items for safekeeping.)

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

To create an e-mail signature, please follow these steps:

- 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 the signature with
- 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
- 6 Click Next
- 7 In the Signature text box, type the text you want to include in the signature
- 8 You can also paste text to this box from another document
- 9 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
- 10 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
- 11 Click Finish when you are done editing the new signature

### Outlook Today

Outlook Today is an at-a-glance view of your 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



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