

# WORKING WITH OUTLOOK

## Quick Reference Guide

### Concept:

Outlook provides many tools for managing e-mail, calendar, contacts, and tasks. This Quick Reference Guide provides an overview of commonly-used tasks.

### Mail Messages

#### Addressing a message

- The firm address book is now named the **Global Address List**
  - Your personal address book is named **Contacts**
  - Use a semi-colon to separate addresses instead of a comma
1. Type the recipient's first or last name in the **To** field
  2. Press **CTRL + K** to resolve the name

#### Adding attachments

##### Attach a DeskSite Document

1. Right click a document from a search result or **Recent Documents**
2. Click **Send Document** to send a copy  
**OR**  
Click **Send Nrl/Url** to send a link, then **To Latest Version** or **To This Version** from the submenu

##### Attach from a local drive

1. Click the **Attach File** button from the ribbon
2. Browse to the file location
3. Select the file to be attached
4. Click **Insert**

#### Using the Confirmation Form

Many e-mails sent or received during a representation are formal, carefully drafted communications intended to convey information or transfer electronic documents necessary to represent a client effectively, or are otherwise documents that the client may reasonably expect us to preserve. It is the firm's expectation that these e-mails be coded and filed to the appropriate client matter number and folder. Simply typing a client matter number or picking one from a list makes these e-mails easily found in a way that is standard across the firm. In the future, we will add the ability to publish important e-mails to a correspondence file available to the matter team. For now, however, e-mails are available only to the sender and the recipients.

E-mails that are not matter related need not be coded with a client matter number, but it may be appropriate to retain in a folder those that are important.

Naturally, many e-mails are casual or informal and are unnecessary to file or even to retain at all.

*For more information about the form, see the "Confirmation Form Quick Reference Guide."*

## Accessing archived messages

Mail is automatically archived using a tool called Mimosa. The **Email archive** replicates the same folder structure that is in Outlook, allowing easy access to filed messages through searching or browsing.


1. Select the **\_Email Archive folder** from the **Inbox Navigation** pane
2. Click **Browse** from the **Nearpoint** toolbar to browse archived messages using your Outlook folder structure

**-OR-**


1. Click **Quick search** from the **Nearpoint** toolbar
2. Type a search phrase in the search bar
3. Click **Search**

Archived mail older than six months will not be able to be deleted.

## Accessing “Extended” Attachments

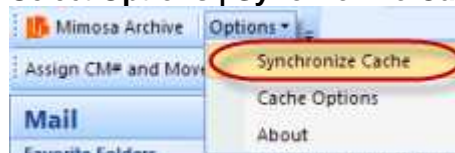
Attachments larger than 5 MB (roughly 200 page word file) are saved to the archive seven (7) days after receipt. These messages will still appear in the mailbox, but will have an extended message  icon to the left of it, which indicates that the message has been extended. If you will be working in Outlook offline, be sure to synchronize cache beforehand.

**To open an extended message in Outlook:**

Double-click the  icon that appears to the left of the extended message. *A brief progress window may appear and the message will download and open automatically.*

**To synchronize messages locally before working offline in Outlook:**

1. Select **Options | Synchronize Cache** from the Mimosa toolbar



2. A **Synchronize cache** window will appear in the lower right corner of the Outlook window. When this disappears, the synchronization is complete.

**Accessing extended messages on the BlackBerry:**

Messages that have been extended will be available on the BlackBerry, however, attachments in the message cannot be opened or viewed on the BlackBerry.

## Lotus Notes Databases

Lotus Notes databases are still accessible through the Lotus Notes application. Replicated databases are available locally.

Access Lotus Notes by selecting **Start | All Programs | WGM Applications** from the Windows desktop.

## Sending a Lotus Notes Database Link

Lotus Notes database links cannot be sent from Outlook, and therefore must be sent using Lotus Notes. Although you will no longer receive messages in Lotus Notes after the Outlook migration, you will have a “post-migration” Lotus Notes mailbox from which you can send e-mail if you need to send a Lotus Notes database link.

1. Right-click the database icon from the Lotus Notes Workspace

2. Select **Database | Copy as Link**
3. Create a new e-mail message in the Lotus Notes post-migration mailbox
4. Place the cursor in the message area of the e-mail and select **Edit | Paste** from the menu bar
5. Type the message text and click **Send**

***Tips:***

- To create a new message from anywhere in Outlook, press **CTRL+SHIFT+M**.
- A copy of a new message is automatically saved to the **Drafts** folder every 3 minutes.
- Drag and drop any folder to the **Favorite Folders** area at the top of the navigation pane to gain quick access to it.

***Resources for help:***

- Please contact the IT Helpdesk at ext. 1234 or 1-800-555-1234 and select option 2, or contact your local IT staff.