

Outlook 2007 Migration FAQs

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The WVU Health Sciences Center is moving from GroupWise to Microsoft Exchange for our e-mail service and software.

Information Technology Services (ITS) will migrate much of your information to the Outlook Exchange server. The following information will be migrated: Mail, Calendars, Cabinets, Tasks Lists, Address books, and Sharing/Proxy rights. Your current e-mail address will not be changed by this migration.

Your signature and GroupWise archive will not be migrated, however, this document provides information on creating new signatures and transferring your personal archive.

Symantec Endpoint Protection (SEP)

Before running Outlook on your computer, you must update Symantec Endpoint Protection (the virus scanning program running in health sciences) on your computer.

For more information on installing SEP, please see the **Setting Up Microsoft Outlook** documentation.

http://www.hsc.wvu.edu/its/LC/Documents/HowTo/Outlook/Setting_Up_Outlook.pdf

To Update SEP

1. Check the current version of Norton or Symantec virus protection on your computer. You should be running SEP version 11. (See the **Setting up Microsoft Outlook** documentation for information on checking your version of SEP.)
2. If you are not running SEP version 11, you need to uninstall your current version prior to installing version 11. See the **Setting up Microsoft Outlook** documentation for more information.

The Outlook Client

Most PC users should already have the Office 2003 or 2007 Professional Suite installed on their computers. If you do not have Outlook installed in your computer, please contact your departmental Computer Support Contact (CSC).

For more information on installation and configuration settings for Outlook, please see the **Setting up Microsoft Outlook** documentation.

Trash

Like the GroupWise system, trash will automatically be deleted from the Deleted Items folder after seven (7) days.

For more information, please see the **Outlook Mail** documentation.

http://www.hsc.wvu.edu/its/LC/Documents/HowTo/Outlook/Outlook_Mail.pdf

Auto Complete/Check Names

When you begin using Outlook, e-mail addresses will not auto-complete until you have sent a message to a user once. After the initial message, auto-complete in Outlook will work the same as GroupWise did. When using an address for the first time, use either the address book or the Check Names function.

For more information, please see the **Outlook Mail** documentation.

To Use the Check Names Function

1. Create a new mail message.
2. Type in the last name of the person to whom you want to send a message.
3. Click the **Check Names** button on the Ribbon.
4. In the Check Names dialog box, select the name of the person in your address book.
5. Click **OK**. The name of the recipient appears underlined in your e-mail message.

Signature

Signatures are not imported from GroupWise to Outlook. You will need to recreate your signature in Outlook.

For more information, please see the **Outlook Mail** documentation.

To Create a Signature

1. From the menu choose **Tools** and the **Options**.
2. Select the **Mail Format** tab.
3. Towards the bottom of the dialog box, in the Signatures section, click the **Signatures** button.
4. In the Signatures and Stationery dialog box, click the **New** button.
5. In the New Signature dialog box, type a name for your signature file. This can be something as simple as "my signature."
6. Click **OK**.
7. Enter and format the signature as desired. Once your signature has been formatted, click the **Save** button.
8. In the top right corner of the Signatures and Stationery dialog box, select when the signature should be added to your messages. By default, the signature is added to new messages.

Resending a Message

Outlook allows you to resend messages to recipients that are using the same server as you.

For more information, please see the **Outlook Mail** documentation.

To Resend a Message

1. In the Mail section of the Navigation Bar, select the **Sent Items** folder.
2. Open the message you want to resend.
3. In the Ribbon click the **Other Actions** button and from the drop down menu select **Resend This Message**.
4. Make any desired changes to the message.
5. Click **Send**.

Retracting a Message

After a message has been sent, Outlook allows you to retract or delete that item—provided the message has not been opened by the recipient and provided the recipient is in the HSC Exchange system.

For more information, please see the **Outlook Mail** documentation.

To Retract a Sent Item

1. In the Mail section of the Navigation Bar, select the **Sent Items** folder.
2. Open the message you want to resend.
3. In the Ribbon click the **Other Actions** button and from the drop down menu select **Recall This Message**.
4. In the Recall this Message dialog box, select **Delete unread copies of this message**.
5. Click **OK**.

Tracking Sent Items

By default, Outlook does not track sent items and does not contain an option to allow you to track all sent items. Additionally, the option for tracking when an item is read by the recipient can be overridden by the recipient. As with GroupWise, tracking sent items is consistent only within the HSC Exchange system.

For more information on tracking sent items, please see the **Outlook Tips & Tricks** documentation.
http://www.hsc.wvu.edu/its/LC/Documents/HowTo/Outlook/Outlook_Tips_Tricks.pdf

To Track a Single Item

1. In a mail message, select the **Options** tab of the Ribbon.
2. In the Tracking section, select the desired option.
Request a Delivery Receipt sends you an e-mail message when your message has been delivered to the inbox of recipient(s) in the HSC Exchange system.
Request a Read Receipt sends you an e-mail if the recipient chooses to notify you that they have read the message. In most cases this does not work outside the HSC Exchange system.
3. Send the item.
4. Outlook creates an e-mail informing you that the message was delivered to any recipients within the HSC Exchange system.
5. The recipient receives an alert when they open the message, asking them if they would like to mail a receipt to the sender. **This is optional! The recipient can choose NOT to reply to your request!**
6. Once the recipient has read the message, and chosen to respond to your request, an e-mail appears in your mailbox, informing you that the recipient has read the message. If recipient **chooses NOT to respond to your request**, you will not know if the message was read.

Archive

Outlook allows you to store your e-mail and calendar items on the hard drive of your computer or to another designated location such as a local network drive. Once an item has been archived, it is available only from your computer and not from web access.

All items that are sent or posted to an account are stored on the Outlook server. All items are removed from the server after 120 days. Items that have not been archived will be lost.

For more information on the archive, please see the **Outlook Mail** documentation.

To Set Up Your Archive

1. From the menu choose **Tools**, and then **Options**.
2. The Options dialog box opens. Select the **Other** tab.
3. Click the **AutoArchive** button.
4. Click the **Browse** button beside **Move old items to** to select the folder where your messages are archived.
5. Click **OK** when all desired settings are made.
6. Click **OK** again to return to your mailbox.

To Retrieve Archived Mail

1. Open the **Archive Folders** folder you created in Outlook.

Importing your GroupWise Archive

You will need to import your GroupWise archive into Outlook to be able to see your older archived items. Once migrated, your GroupWise archive will appear as a folder in your Inbox.

For instructions on importing and accessing your GroupWise archive, please see the **Setting up Microsoft Outlook** documentation.

Sharing

You can share your calendar(s), folders, and mailboxes with others. When you share your main calendar with someone, Outlook allows you to request that the recipient share their calendar with you.

For more information, please see the **Outlook Mail** and **Outlook Calendar** documentation.

To Share Your Calendar

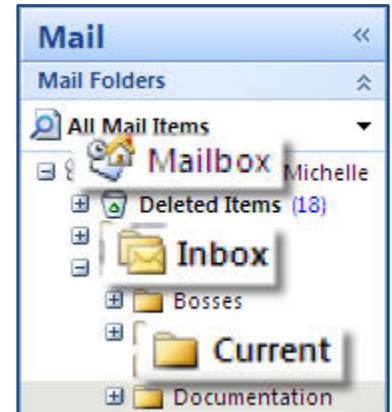
1. **Right click** on your calendar.
2. From the menu choose **Share "Calendar"**.
3. A message opens.
4. In the **To** box, add the individuals with whom you would like to share your calendar.
5. If desired, place a check in the box to **Request permission to view recipient's Calendar**.
6. Add a message if so desired.
7. Click the **Send** button.

Sharing Folders

Sharing folders allows you to share mail messages with other individuals in your department. When sharing a folder, you must not only share the selected folder, but every containing folder for that folder. This means you will have to share your mailbox and possibly your inbox if you want to share a folder with someone. Because of this, we recommend placing shared folders in your mailbox, rather than your inbox.

In the example on the right, to share the folder Current, you must also share the Inbox and the Mailbox, so in total you will share three folders for the recipient to view the contents of the Current folder.

For more information on sharing folders, please see the **Outlook Mail** documentation.



To Share a Folder

1. **Right click** on your **Mailbox**.
2. From the drop down menu select **Change Sharing Permissions**.
3. Select the **Permissions** tab.
4. Click the **Add** button.
5. Find the user(s) you want to share the folder with. Click the **Add** button or double click on their names to add them to the list.
6. Click **OK**.
7. Select the name of the individual(s) with whom you want to share the folder.
8. In the Permissions section, beside Permissions Level, select **Reviewer**.
9. Click **OK**.
10. **Right click** on the **folder** to be shared.
11. From the menu select **Change Sharing Permissions**.
12. Select the **Permissions** tab.
13. Click the **Add** button.
14. Find the user(s) you want to share the folder with. Click the **Add** button or double click on their names to add them to the list.
15. Click **OK**.
16. Select the name of the individual(s) with whom you want to share the folder.
17. In the Permissions section, select what rights the selected individual(s) will have to the folder.
18. Click **OK**.

To Access a Shared Folder

1. From the menu choose **Tools** and then **Account Settings**.
2. Select **Microsoft Exchange**.
3. Click the **Change** button.
4. In the Change E-mail Account dialog box, click the **More Settings** button.
5. Select the **Advanced** tab in the Microsoft Exchange dialog box.
6. Click the **Add** button.
7. In the Add Mailbox dialog box, type in the name of the person who is sharing the folder with you.
8. Click **OK**.

9. Click **OK**.
10. Click **Next**.
11. Click **Finish**.
12. Click **Close** to close the Account Settings dialog box.
13. A new folder appears and contains the shared folder.

Outlook Remote Access

You will be unable to access the Outlook client when you are off the HSC campus. When you are away from your office you will need to use the Outlook Web access to view your mail and calendar items .

To access your mail and calendar from Outlook Web Access, go to: **<https://exweb.hsc.wvu.edu>**.

Please note that you cannot view shared mail and calendars through Outlook Web Access. If you need to view shared mail and calendar access, or can only view the Light version of Outlook Web Access, you can access the full Outlook program through Citrix. To log into Citrix, go to **<http://masterapps.wvu.edu>**.

To use Citrix, you must fill out the Remote Access form and have that form approved by your dean before you can access the Citrix server. The Remote Access form is located on the ITS website at **<http://www.hsc.wvu.edu/its/Forms>**.

For more information on using Citrix, please see the **HSC Remote Access via Citrix** documentation.

For more information on accessing Outlook web access, please see the **Outlook Web Access** documentation. For more information on using Citrix, please see the **HSC Remote Access via Citrix** documentation.

If you would like more information about other Learning Center workshops, please visit our website at <http://www.hsc.wvu.edu/its/LC> or call the Learning Center at 293-3631 ext 5.