

Solutions

Saving and Archiving Email in Microsoft Outlook

Internet access and email correspondence is changing how companies do business. One of the biggest challenges facing firms is what to do with email messages after they have been read or sent. Most firms want to keep a copy of the email, similar to any other piece of correspondence to/from a client, opposing council, etc. So, what is the best way to store the email to be able to reference it in the future?

Many attorneys create sub-folders in their 'In-box' with client or matter names. When they receive an email, they move it to the appropriate sub-folder. The problem with this method of storing email is the number of emails in your 'Inbox' and 'Sent Items' keeps growing. If you do not delete or archive email from your 'In-box', 'Sent items', and 'Trash', you will not only slow down your email client, such as Microsoft Outlook, but you can also grind it to a halt with too many emails. It is extremely difficult to determine the exact number of emails that will cause a crash, since each email is a different size and the number and size of attachments varies. However, if you are not saving, deleting and archiving emails, it may just be a matter of time before it happens to you.

A better method for storing email is to save a copy of the email within your client folder structure where you save other correspondence for the client/matter, similar to how you save your Word documents. To do this, create a folder called EMAIL under each of your client/matter folders. For example: S:\Clients\Smith; John\Email.

Your emails will be stored in the same folders that you save your other client/matter documents. You will be able to save the emails and later open them to read them. When there is an attachment on an email, the attachment must be saved separately. The original name of the attachment will be in the saved email file.

When you have an email open or are highlighted on an email in Microsoft Outlook, select the File drop down menu, then select Save As. A Save As dialog box will appear and in the Save In box and you can navigate to the appropriate folder

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Microsoft Welcomes a New Member to its Family - Vista

Windows Vista, Microsoft's newest operating system, was released at the beginning of February. Consumers are once again faced with a difficult decision whether or not to upgrade to the latest version of Windows. Similar to the release of Windows XP, there are many issues to consider when upgrading to Microsoft's newest operating system.

One of the first items to consider is whether or not Microsoft Vista will run on your existing computer. The recommended system requirements for Vista are at least 1GB of RAM and the processor must be at least a 1GHz 32-bit (x86) or 64-bit (x64) processor. These two items are the most critical minimum requirements and will usually dictate the ability of the system to handle Windows Vista. Even though your current pc hardware may not be that old, these are crucial items to look at if you intend to upgrade. Also, the graphics card in the pc must have dedicated memory and support DirectX 9 graphics with 128MB of graphics memory (minimum) and a DVD ROM drive. Additionally, the computer must have at least a 40GB hard drive with at least 15GB of space available.

Next, consider software compatibility issues with Windows Vista. Generally, most software that was built for Windows XP can be successfully run on Windows Vista. However, you should check with any critical software program manufacturers before making the switch. Software applications, such as, accounting, payroll, and time keeping packages should be thoroughly investigated for version compatibility with Windows Vista. Most printers and multifunction machines have also had success in using device driver's native in Windows Vista, but should once again be researched before switching. The good news is most of these compatibility details can be found on the manufacturer's websites and are usually explained in detail.

When considering the purchase of Vista, be aware that there are several versions of Vista, but only a few are acceptable for use on your business' computer network. A business should stay away from anything that has "Home" in the title such as, Windows Vista Home Basic and Home Premium.

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Using Time Matters to Save Email

With the proliferation of email messages, everyone is looking for better methods to save their emails. Time Matters Practice Management Software has a wonderful email utility that many users do not know about. The email utility integrates Outlook with Time Matters and provides the ability to create Time Matters email records based on the information contained in an Outlook email message. Additionally, attachments can be automatically saved as documents when the email is saved.

To link an email with or without an attachment, open an Outlook email message that you want to link to Time Matters. Click the **TM Connect Email** button. If there are attachments to the email, you will be presented with an Attachment Handling Box and prompted Save attachments as: Attachments to the Email, Document records related to the Email or Do not save attachments from this Email. If there is no attachment, you will not be prompted with this box.

- Attachments to the Email – this option saves as attachments and does not create a separate record within Time Matters. Attachments will only be found by opening the email to which it is attached.
- Document records related to the Email – (RECOMMENDED) – this option will save the attachments as document records within Time Matters and will save them to a folder you specify.
- Do not save attachments from this Email – this option will not save the attachments. It will save the email message only

The Time Matters Email Form will open with the information from the Outlook email already completed. Enter a Code and relate (or link) this email to a Client and/or Matter using the **Regarding** fields in the same way described you would link an event. Click the **Save and Close** button.

Both a Time Matters Email record and a Document record will be created and related to the Client/Matter you chose. The Email can now be deleted from Outlook since the information is stored and linked to your Client/Matter in Time Matters.

If you are currently using Time Matters this is an excellent way to not only reduce the amount of email in your inbox but also organize emails according to their Client/Matter. Just click on the Client/Matter and all of the documents and emails will be available at your fingertips. ☺

*For more information contact Alicia Slade at ext 202
or Leslie Hennessy at ext 228*

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These versions are enhanced for home use and lack fundamental business uses such as the ability to log onto Microsoft domains on your Microsoft computer network in the office. ☺

For more information contact Rex Gleeson at ext 222

Are You Prepared? New Daylight Savings Time Changes Effecting all PCs

The United States Congress passed the Energy Policy Act in 2005 and the law goes into affect this year, 2007. The law changes Daylight Savings Time (DST) to the second Sunday in March (March 11th), which is three weeks earlier than it had been previously, and the first Sunday in November, one week later than it had been previously. Due to the new DST changes, your pc's and servers will not automatically change the time, since they are programmed based on the old calculation for DST.

Microsoft has released a patch for DST. Over the past few weeks, Microsoft keeps changing the status of the patch between non-critical and critical. A critical patch is one that would automatically be applied when your pc runs automatic updates to its operating system. Since the status has changed a few times, a non-critical patch will not automatically update your pc's and servers. The DST patch must be applied to all of your pc's and Microsoft servers. Other servers, such as, Red Hat Linux and Novell, will have their own patches to change the time. Once the patch has been applied, your pc's and servers will be able to calculate DST based on the new dates. Also, Microsoft has special instructions for Exchange servers and Outlook users. Visit http://support.microsoft.com/gp/cp_dst.

Changes will also need to be made to your handheld devices, such as, the Palm Treo's, Blackberry's and Motorola Q's. There are settings to change the calculation for DST. Also, some phone systems may also need patches to calculate the new DST.

Please contact us at 412-261-5600 to schedule an appointment to apply the DST patches to your pc's and servers. ☺

For more information contact Alicia Slade at ext 202

Mark Your Calendars for the Spring 2007 Timeslips User Group Luncheon

Please join Plummer Slade's Timeslips Certified Consultants and staff on Thursday, April 26th in the Academy Room located in the City County Building. A complimentary lunch and refreshments will be available. The Timeslips Consultants will discuss some of the new features in Timeslips 2007 such as Enhanced Navigator Options, Bill Cover Page/Bill Layout Customization, Bill Messages and more! This is an excellent opportunity for Timeslips users to share ideas on how they are using Timeslips as well. More information will follow as the event date draws closer.

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where you want to save the email. The File Name box will have the subject line of the original email as the name of the file. The file name can be changed to something meaningful, for example: 2007-02-01 Response to Settlement Offer. The Save As Type will be preset based on the format of the email message the sender sent to you.

- Text Only will save the email as a .TXT file. The email will open as a text file when read.
- Outlook Message Format will save the email as a .MSG file. When you select the file, it will open Outlook to read the file.
- HTML will save the email as a .HTM file. The email will open as an HTML document when read.

Change the format of the message to the type you prefer and then click the Save button. To begin saving emails, you should practice by saving a few in different formats and then open the saved email files so you can see what the different formats look like. The original email will remain in Outlook until deleted. If you highlight several email messages at one time, then select File, Save As, all of the emails will be saved in one file.

Along with saving the email messages, you should also archive emails. Outlook has a built-in archiving feature which will remove old items from the mail server or your email client and store them in an 'Archive' file located on the C:\ drive of your local PC. These archived items can then be burned to CD/DVD periodically for storage and removed from the local PC as well.

To archive emails, it is first helpful to know what the default aging is for emails. According to Microsoft's Help File for Outlook, the default aging period for the 'Inbox' is 6 months, 'Sent items' is 2 months, and 'Outbox' is 3 months. Any created sub-folders have a 6 month aging period. The email message receive date or the last modification date determines the email's age. To setup the archive folder and archive file name, do the following:

1. Go to the 'File' menu, then click on 'New' then select 'Outlook Data File'.
2. Select 'Office Outlook Personal Folders File (.pst)', then click on OK.
3. Keep the default location of the file, but make the filename 'Archive.pst' instead of 'Personal Folders.pst'
4. This will open the 'Create Personal Folders' window, in the Name field, type 'Archive', then click OK.
5. Now you will have a new set of folders in your Folder List where you can begin to archive old items.
6. You will need to create the folders which you wish to use to archive old messages into. For instance, you should create a 'Sent Items' folder and any others that you plan to archive.
7. Now you can manually move messages from the real 'Sent Items' folder, into the Archive 'Sent Items' which will remove them from the server and place them on the local hard drive into the new .pst file you just created.

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8. Now you can manually move messages from the real 'Sent Items' folder, to the Archive 'Sent Items'. This will remove them from the server and place them on the local hard drive in the new .pst file you just created.
9. You should check to be sure that the default settings for Auto Archiving are set to move messages to the correct place. Go to the 'Tools' menu, then into 'Options', then 'Other'.
10. You can set the timing and location of the AutoArchive process with this dialog box.
11. You can also set the AutoArchive options individually for each folder to further customize the scheduling and locations of archives on a folder by folder basis.

To get to the archive file, open 'My Computer' then navigate to C:\Documents and Settings\[username]\Local Settings\Application Data\Microsoft\Outlook\. You should see the 'Archive.pst' file in this folder. You can copy the 'Archive.pst' file to CD/DVD or other media.

If you have been trying to figure out how and where to store email messages, try using the email saving method above. Also, take steps to archive your emails. You will prevent issues with your email client and will be able to access all of your emails easily, just like your other client/matter correspondence. ☺

For more information contact Alicia Slade at ext 202

Timeslips Service Release 1

Sage Software, Timeslips manufacture, has made available Service Release (SR) 1 for Timeslips 2007. The SR resolves the following issues with the software:

- Timeslips no longer displays a "some data may be corrupted..." error when the program is left idle for a certain period of time.
- New expense slips will now display the default expense description into the slip description area.
- Timeslips will show adjustment description on bills. Prior to installing Service Release 1, Timeslips would not include description text on the bill for the Adjust total charges, Adjust by timekeeper, Adjust by task, or Adjust by expense billing arrangements.
- Centered text on a bill no longer overlaps.
- Accessing *setup/preferences* while the navigator is loading will no longer cause an access violation error.
- Timeslips no longer includes a carriage return when expanding abbreviations.
- Timeslips can now interpret abbreviation tokens that include slashes.
- Timeslips can now combine slips from previous versions of Timeslips.
- Task markup/discount settings will copy to new slips.

Please contact Plummer Slade's Timeslips Certified Consultants for assistance with the installation of this Service Release. ☺

For more information contact Lenny Jones at ext 211

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| <ul style="list-style-type: none">• Timeslips 2004 is no longer supported by Sage software. Additionally, Time Matters 5.0 is no longer supported by Lexis Nexis. Please contact Plummer Slade if you still need to upgrade your Timeslips or Time Matters software.• Check out Plummer Slade's newly redesigned website at www.plummerslade.com. You can now register for training classes and purchase training manuals online using our shopping cart! |