Quick Help Job Aids

To Commonly Used Tasks In Windows XP & Office 2000

Adding Printers
CG Help Service Requests
Desktop Shortcuts
Task Manager

Pubs & Directives
Jet Form Filler
WinZip
Outlook Tips & Tricks
More…

Information Resource Center, Training Center Petaluma CA
(707) 765-7523
http://cgweb.tcpet.uscg.mil/ltc
http;//www.uscg.mil/hq/tcpet/irc
E-mail: IRCHelp@d11.uscg.mil

Adding A Network Printer

Connect to a printer

This job aid will show you how to connect to a network printer.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1.</td><td>On the Start menu, point to Settings.</td></tr>
<tr><td>2.</td><td>Click on Printers And Faxes. A window will open showing currently installed printers.</td></tr>
<tr><td>3.</td><td>Double click the ADD Printer icon. The Add Printer Wizard will open. Click Next.</td></tr>
<tr><td>4.</td><td>Select Network Print Server if it is not already selected.</td></tr>
<tr><td>5.</td><td>Click Next. The Connect to Printer window will open.</td></tr>
<tr><td>6.</td><td>
<table>
<tr><th>If…</th><th>Then.</th></tr>
<tr><td>You know the server location and name of the printer you want to connect too…</td><td>A. Click the Connect To This Printer option
B. Type in the name of the printer using the suggested format.
C. Click Next.</td></tr>
<tr><td>You want to browse for the printer you wish to connect too…</td><td>A. Select Browse for a Printer.
B. Click Next and scroll down the list of printers until you see the printer you want to add and click on it to select it,
C. Click Next.</td></tr>
</table>
</td></tr>
<tr><td>7.</td><td>
<table>
<tr><th>If…</th><th>Then.</th></tr>
<tr><td>You want this to be your default printer OR it is the only printer you will be using…</td><td>Select Yes to set as default.</td></tr>
<tr><td>You do not want this to be your default printer OR you are connected to other printers…</td><td>Select No to set as default.</td></tr>
</table>
</td></tr>
</table>

8.	Click **Next**.
9.	Click **Finish**.

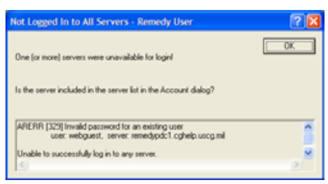
Service Requests Using CG Help (Remedy Action Request System)

CG Help is a trouble ticket (service request) system used to help ESU's and ESD's manage work requests and trouble calls. Users can electronically submit and track the progress of work requests via any Standard Workstation

Ticket Submission

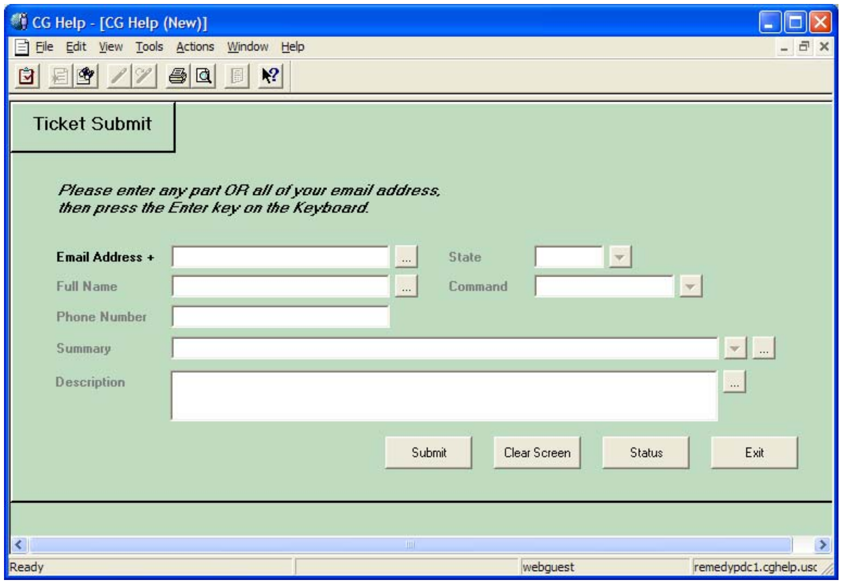
This job aid will show you how to submit a service request (ticket) using CG Help (Remedy Action Request System).

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1.</td><td>Click on the CG Helpdesk Icon on your desktop


OR click Start, Programs, USCG Apps, Action Request System, CG Help.</td></tr>
<tr><td>2.</td><td><table><tr><th>If…</th><th>Then</th></tr><tr><td>You get a dialog box titled "Not Logged On To All Servers – Remedy User…

</td><td>Click the OK button. The system will connect and the Login screen will open.</td></tr></table></td></tr>
<tr><td>3.</td><td>Enter the user name Webguest (it may already be there by default).</td></tr>
<tr><td>4.</td><td>Enter the password Webguest.

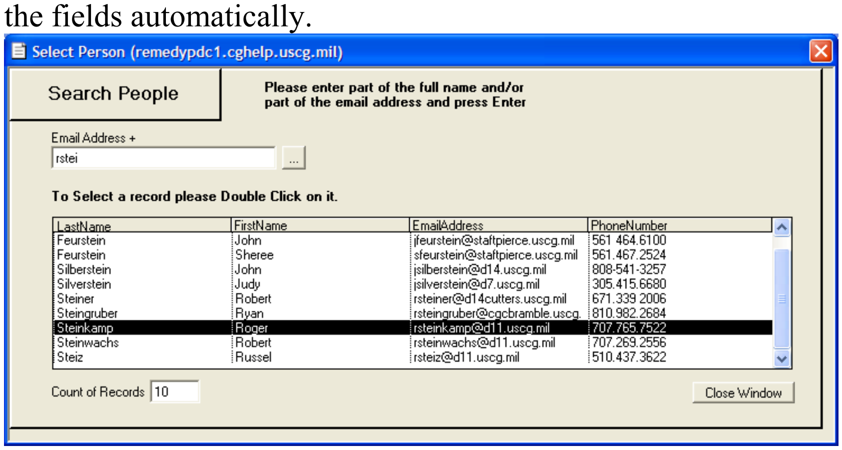
</td></tr>
</table>

5. Click the **OK** button. Wait for the server to log you in. The Ticket Submit window will open.



6. Enter your e-mail address in the E-mail Address field and press **Enter**.

Note: This is a searchable field. If you enter only the first few letters of your email address then press enter, the remaining profile fields will be populated for you, or a list will come up that you can choose from. Double-click your name to populate the fields automatically.

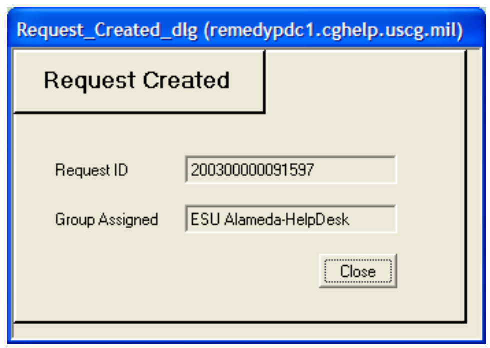


7.

If…	**Then**
The wrong information populates the user profile fields…	Click the Clear button and return to step **6**.

<table>
<tr><td>8.</td><td>Enter a brief summary of the request or problem in the Summary field. (E.g. E-mail Not Working)</td></tr>
<tr><td>9.</td><td>Enter a detailed description of the request or problem in the Description field. (E.g. I cannot find all the files and folders I was saving in my e-mail or my inbox.)

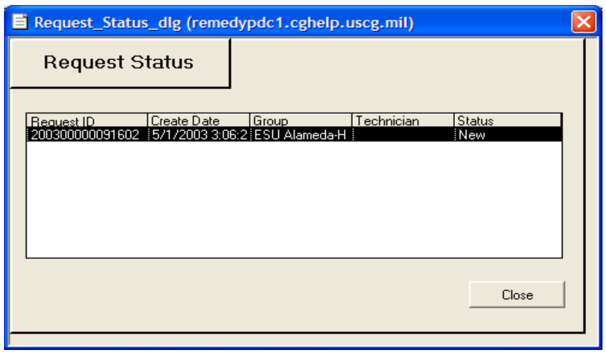
Note: Be as <u>descriptive</u> as possible. Include any error codes/messages or unusual dialogue boxes. The more information you provide, the faster the technicians can address the request and take action.</td></tr>
<tr><td>10.</td><td>Click the Submit button. The Request Created dialogue box will open (it may take a few seconds to appear).



You do not need to write down any of this information. Confirmation e-mail will be sent to you containing the request ID.</td></tr>
<tr><td>11.</td><td>Click the Close button. You will be returned to a blank Ticket Submit form.</td></tr>
<tr><td>12.</td><td><table>
<tr><th>If…</th><th>Then</th></tr>
<tr><td>You want to submit another ticket…</td><td>Return to step 6.</td></tr>
<tr><td>You are finished submitting tickets…</td><td>Click the Exit button.</td></tr>
</table></td></tr>
<tr><td>13.</td><td>Once the ticket has been assigned to a technician and the request completed, you will receive a notification of ticket-closed e-mail. The technician will contact you if additional information is required to complete the request.</td></tr>
</table>

Checking Ticket Status

This job aid will show you how to check the status of a service request (ticket) using CG Help (Remedy Action Request System). This portion of the job aid assumes you have logged into CG Help before and are familiar with the Ticket Submit screen.

Step	Action
1.	Start CG Help as normal using the **Webguest** account.
2.	Fill in the **profile information** starting with your e-mail address.
3.	Click the **Status** button.  Any tickets that are still open will be listed, showing to whom it was assigned and the current status.
4.	Click the **Close** button to close the status window.
5.	Click the **Exit** button on the Ticket Submit form to exit the system.

Creating Desktop Shortcuts

There are <u>dangers</u> in saving files directly to your desktop for easy retrieval. At a minimum if your profile is ever damaged, you may loose all of the files. It is <u>strongly suggested</u> to get in the habit of saving files to your U:\ drive (My Docuemtns) and creating <u>*shortcuts*</u> to those files on the desktop. Shortcuts are small in file size and easy to replace.

Move files off the desktop

This job aid will show you how to move whole files off the desktop to your U:\ drive (My Documents). You should perform this function prior to attempting to create a shortcut to the file(s).

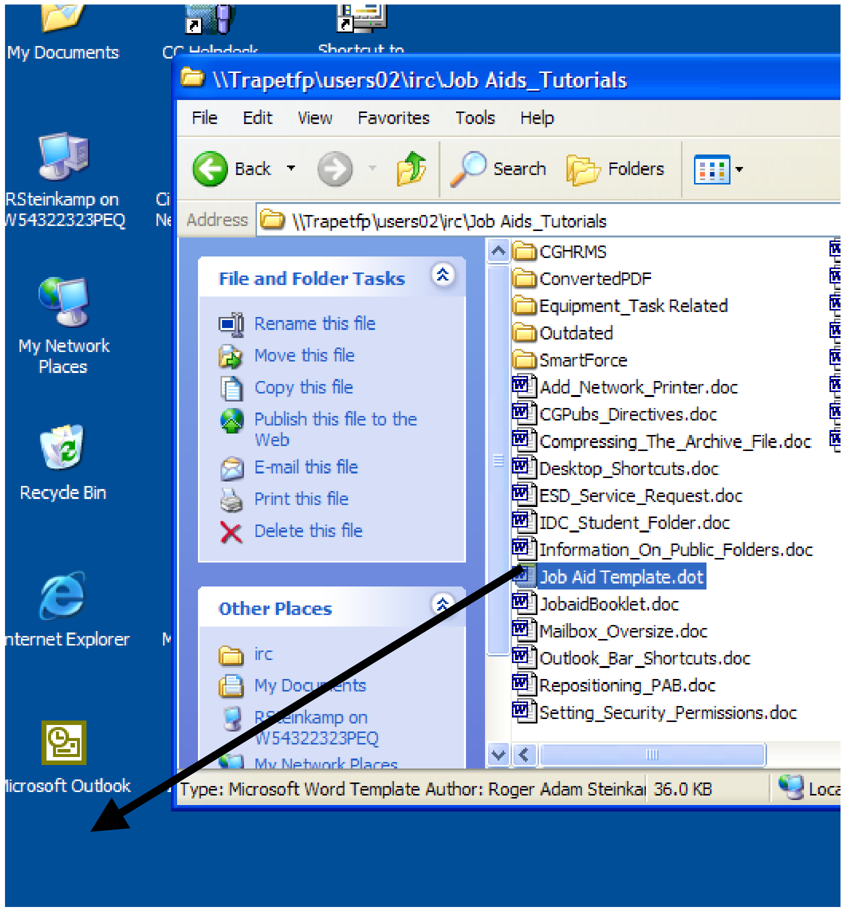
Step	Action
1.	**Right click** once on the file to be moved off the desktop.
2.	Trace to and click on **Cut**
3.	**Navigate** to your **U:/ drive**. The most common way to navigate to the U:/ drive is via the My Documents Icon located on the desktop.
4.	Once at the U:/ drive (My Documents), from the **Edit** menu, chooses **Paste**.

Creating shortcuts on the desktop

This job aid will show you how to create a shortcut on the desktop, to commonly used files or folders on your U:\ drive (My Documents) or any other location.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1.</td><td>Navigate to your U:/ drive or other file location. The most common way to navigate to the U:/ drive is via the My Documents Icon on the Desktop.</td></tr>
<tr><td>2.</td><td>Right click on the file that you want to create a shortcut to, and trace to Send To…</td></tr>
<tr><td>3.</td><td>Select Desktop As Shortcut.</td></tr>
<tr><td>4.</td><td><table>
<tr><th>If…</th><th>Then.</th></tr>
<tr><td>The Desktop As Shortcut option is not available…</td><td>Continue to the next step.</td></tr>
<tr><td>The Desktop As Shortcut option was available….</td><td>The task is completed. Stop Here.</td></tr>
</table></td></tr>
<tr><td>5.</td><td>Ensure you can see both your desktop and the folder or file you</td></tr>
</table>

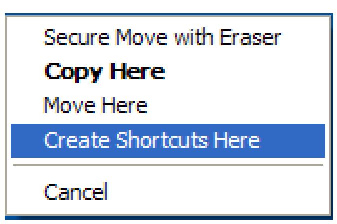
are working with. You may need to resize (restore down) the window to do this by clicking the restore down icon in the upper right corner of the window.



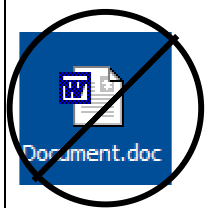
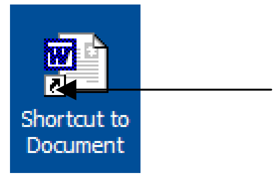
6. Right click on the file or folder you want to move and HOLD THE MOUSE BUTTON DOWN.

7. **Drag** the icon out to the desktop and then release the mouse button.

8. Click **Create Shortcut Here…**



<u>WARNING</u>: You must insure you have a <u>shortcut</u> and not a

	copy of the file or folder. If you have a copy of the file, delete the icon from your desktop and try again. WRONG CORRECT  A shortcut has a small arrow in the lower left corner of the icon. A copy of a file does not.

Delete a Desktop Icon

This job aid will show you how to delete an icon from the Desktop.

Step	Action
1.	**Right click** once on the icon to be deleted off the desktop.
2.	Trace to and click on **Delete.**

Steps for a Successful Login

Steps for a Successful Login

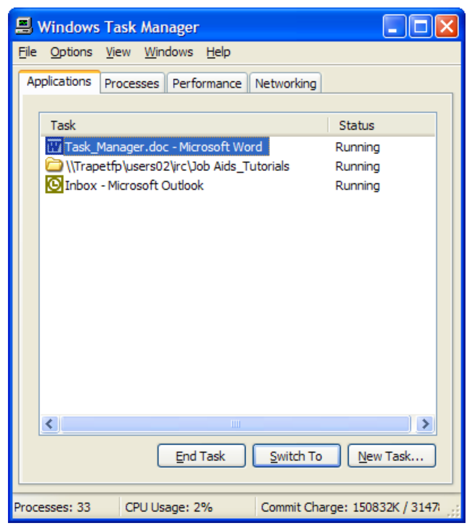
This job aid will walk you through the steps necessary to check for a successful log-in to a SWIII.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Click Start and trace to Programs</td></tr>
<tr><td>2</td><td>Double click the My Documents Icon</td></tr>
<tr><td>3</td><td><table><tr><th>If</th><th>Then</th></tr><tr><td>Access is granted to the My Documents</td><td>Log-in to SWIII is successful and you may begin work.</td></tr><tr><td>Access is denied to the My Documents</td><td>Log-in process is unsuccessful and you must turn off the power to the machine*</td></tr></table></td></tr>
<tr><td>*</td><td>If you have an unsuccessful log-in reach down and turn off the power to the workstation. Wait 30 seconds then turn on the power to the workstation. Once you have turned on the workstation and have the “Ctrl+Alt+Delete” window wait 1 minute before signing in.</td></tr>
</table>

Using Task Manager To End Frozen (Locked) Programs

Introduction

The Windows XP task manager can be used to quit an application that has stopped working (responding), without rebooting or logging off. Follow these steps to use Task Manager to quit a program.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1.</td><td>Press CTRL + ALT + DELETE.</td></tr>
<tr><td>2.</td><td>Click the Task Manager button. The Task Manager will open.</td></tr>
<tr><td>3.</td><td>Click the Applications tab. A list of currently running applications will be displayed with the status.

</td></tr>
<tr><td>4.</td><td>Click on the application that is “Not Responding” to highlight it.</td></tr>
<tr><td>5.</td><td>In the window that appears, click End Task. Wait a few moments.

Note: You may need to drag the Task Manager window up into the middle of the screen to see the whole window and end task button.

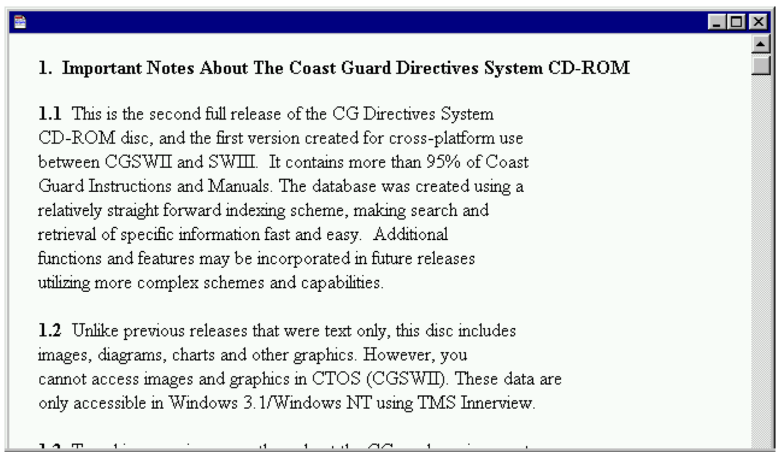
After a few seconds the program will quit.</td></tr>
<tr><td>6.</td><td>Close Task Manager and continue working.</td></tr>
</table>

If an application continues to lock up, contact your system administrator.

Accessing Coast Guard Publications and Directives

Viewing Publications

Use this job aid whenever you need to view a Coast Guard Publication on SWIII.

Step	Action
1	From the **Start** menu, trace to **Programs** then trace **USCG Program Apps** and double click on **Pubs & Directives**.
2	Enter your name and a password in the box that appears. You can use any password you like.
3	Click **OK**. When the CG Pubs & Directives program opens the following window will appear. **<u>Do not close this window for any reason!</u>**  1. Important Notes About The Coast Guard Directives System CD-ROM 1.1 This is the second full release of the CG Directives System CD-ROM disc, and the first version created for cross-platform use between CGSWII and SWIII. It contains more than 95% of Coast Guard Instructions and Manuals. The database was created using a relatively straight forward indexing scheme, making search and retrieval of specific information fast and easy. Additional functions and features may be incorporated in future releases utilizing more complex schemes and capabilities. 1.2 Unlike previous releases that were text only, this disc includes images, diagrams, charts and other graphics. However, you cannot access images and graphics in CTOS (CGSWII). These data are only accessible in Windows 3.1/Windows NT using TMS Innerview. Closing this window causes the program to lock up. If the program locks up, see the job aid **Using Task Manager.**
4	From the **Browse** menu choose **Table of Contents**.
5	**Double click** the type of publication or directive you are seeking. **Example:** Commandant Instruction Manuals
6	Scroll through the list of publications and **Double-click** the publication you wish to view. **Example:** 5216.4B-Correspondence Manual
7	Select the chapter you want to view and Double-click. (some publications may not have chapter numbers listed) **Example:** 3.
8	The publication will be displayed. Use the scroll bar to navigate through the document. (Remember: Do not close the view window!)

Using JetForm Filler

Using a Form

Use this job aid whenever you need to open a blank form for data entry on SWIII.

Step	Action
1.	From the **Start** menu, trace to **Programs** and open **JetForm Filler**.
2.	Click the **Use Form** button. The "Open Form File" window will appear.
3.	Double click the **Forms** folder.
4.	Locate the folder containing the form you need. Folders are named based on the forms they contain. Forms are listed by number, not by name. For example the form **CG 3090- Miscellaneous Accrued Expenditure** is in the **CG 3000** folder.
5.	Double click the folder. A list of forms (**.mdf**) files will appear in the left pane of the window. My example is using the CG3000 files.
6.	Click the desired form. A description of the form will be shown at the bottom of the window.
7.	Click **OK.** The form will open.

Zooming into a Form

Follow these step to zoom into a form.

Step	Action
1.	From the **Options** menu select **Zoom.** The Zoom Options window will appear.
2.	Select **Actual Size.**
3.	Click **OK.**

Entering Data into a Form

When a form is opened the cursor should be in the first field.

Step	Action
1.	Enter the data in the first field
2.	Once the data has been entered use the **Tab** key to move to the next field.
3.	Continue through the fields until all data has been entered.

Saving a Form

When you are ready to save a form follow these steps. This will create a JetForm .dat data file.

Step	Action
1.	Click the **Save** button. The "Save Data As" window will appear.
2.	Enter a file name for the form. **Note:** The name must be 8 characters or less plus **.dat** Example: MyOrders.dat
3.	On the right side of the window select the folder where you want to save the form.
4.	Click **OK.**

Printing a Form

When you are ready to print a form follow these steps.

Step	Action
1.	Click the **Print** button. The "Print" window will open.
2.	Verify that the form will be printed on the desired printer. The current printer is shown in the title bar of the window.
3.	Select the desired print options. (Example would be 2 copies)
4.	Click **OK.**

Exiting JetForm

When you are finished and want to exit JetForm click the **Exit** button.

Opening a Form

To open a form that you have already started or completed, follow these steps. **NOTE:** This only applies to forms that have been saved as data files (.dat).

If you wish to begin a *new* form, go to "Using a Form" on page one of this job aid.

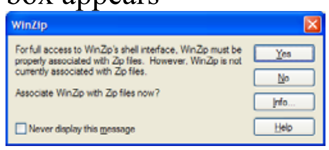
NOTE: You cannot open a JetForm .dat file by double clicking it. You **must** open the form following these steps.

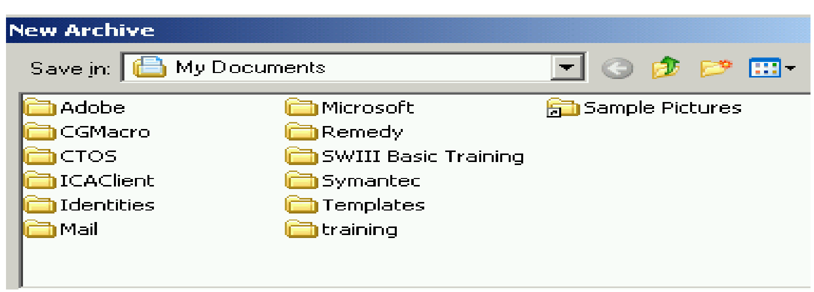
Step	Action
1.	Open JetForm Filler.
2.	Click the **Open Data** button. The "Open Data File" window will appear.
3.	Locate and select the data file you want to open.
4.	Click **OK.** The form will open.

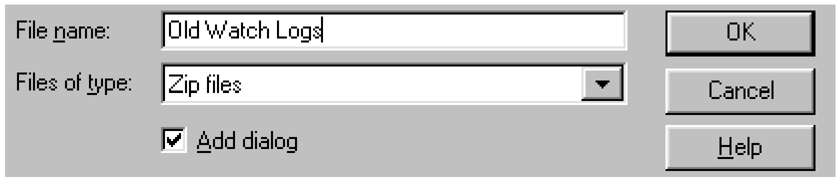
Using WinZip 8.1 to Compress or Decompress Files/Directories

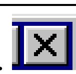
How To Compress

This job aid will show you how to compress files/directories using the WinZip program. There are many options within the WinZip program. This job aid will step through using the default settings. For more information, use the HELP function within the WinZip program.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1.</td><td>Click on the START button.</td></tr>
<tr><td>2.</td><td>Trace to Programs, WinZip, then WinZip 8.1</td></tr>
<tr><td>3.</td><td>Click the Close button to close the "Tip of The Day".</td></tr>
<tr><td>4.</td><td>
<table>
<tr><th>If…</th><th>Then.</th></tr>
<tr><td>A file association dialog box appears

</td><td>Click Yes to associate .zip files with this application.</td></tr>
<tr><td>If a WinZip file association dialog does not appear…</td><td>Go to the next step.</td></tr>
</table>
</td></tr>
<tr><td>5.</td><td>Click the New tool.


Note: Zipping means creating a new ZIP file, then compressing the files/folders you select in later steps into this “ZIP” file.</td></tr>
<tr><td>6.</td><td>In the New Archive window, use the Save In pull down to navigate to the location you wish to keep the zipped files/directory.

</td></tr>
</table>

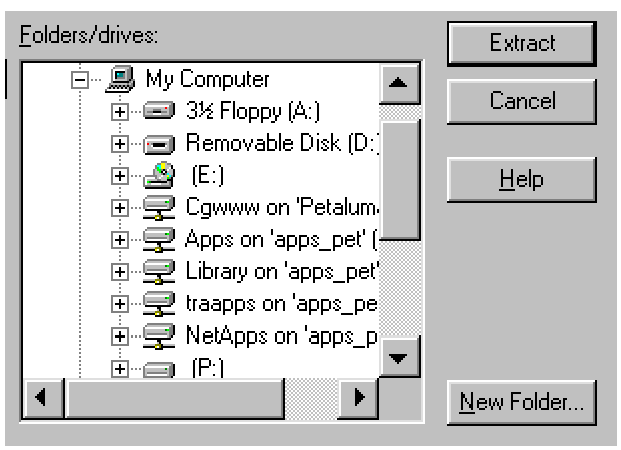
<table>
<tr><td>7.</td><td>In the File Name box, type in what you want to name the zipped file. Keep in mind that you can compress multiple files/directories into one zipped file. Choose a descriptive name.
</td></tr>
<tr><td>8.</td><td>Click the OK button.</td></tr>
<tr><td>9.</td><td>In the Add window, use the Look In: pull-down to navigate to the files/folders you wish to compress.</td></tr>
<tr><td>10</td><td>
<table>
<tr><th>If…</th><th>Then.</th></tr>
<tr><td>You want to compress the entire folder you are currently viewing …</td><td>Click the Add With Wildcards button. This will keep the directory and sub-directory structure in tact.</td></tr>
<tr><td>You want to selectively add files…</td><td>A. Highlight the files you wish to compress, by clicking once on the file or folder name.
B. Click the Add button.
Hint: Hold down the Ctrl or Shift key to select multiple files</td></tr>
</table>
</td></tr>
<tr><td>11</td><td>To compress additional files with the same Zip file, click the ADD button, and repeat steps 8-10

Note: you can add additional files at any time by opening the Zipped file and clicking the Add button.</td></tr>
<tr><td>12</td><td>Close the window. </td></tr>
</table>

How Extract (Decompress)

This job aid will show you how to extract files/directories using the WinZip program. There are many options within the WinZip program. This job aid will step through using the default settings. For more information, use the HELP function within the WinZip program.

NOTE: It is possible to view/edit the contents of a zipped file without extracting (decompressing) it using the View button on WinZip's toolbar.

Step	Action
1.	Double-click the **Zipped file** from which you wish to extract files. WinZip will launch.
2.	**Highlight** each file/directory you wish to extract (decompress) by clicking once on it. Hint: Hold down the Ctrl or Shift key to select multiple files/directories.
3.	Click the **Extract** button. 
4.	In the Extract window, use the Folders/drives area to navigate to where you want to extract the files. If necessary, use the New Folder button to create a folder. 
5.	Click the **Extract** button. The file(s)/Directory(s) will be extracted (decompressed) to the location you selected. Note: Extracting a file will not delete it from the Zipped file

Adding/Removing Shortcuts to Commonly Used Folders in Outlook

Add Shortcuts

Use the following steps to add a shortcut to your Outlook Bar. Shortcuts will save you time and reduce the need to search through a long list of folders.

Step	Action
1	Open **Outlook**.
2	On the **Outlook Bar**, right-click the gray background of the group where you want to add the shortcut.
3	Click **Add To Outlook Bar** on the shortcut menu. The Add To Outlook dialogue box will appear.
4	In the **Folder Name** box, locate the folder you wish to create a shortcut too. Click the name of the folder to highlight it.
5	Click the **OK** button. The shortcut is now in your Outlook Bar.

Remove Shortcuts

The following steps will remove undesired shortcuts from the Outlook Bar.

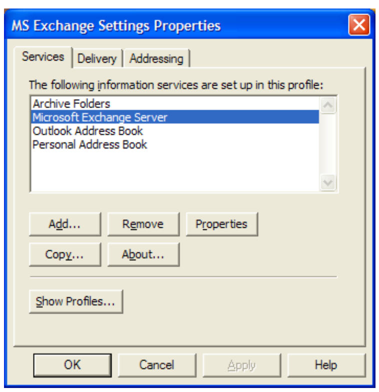
Step	Action
1	On the **Outlook Bar**, right-click the undesired shortcut.
2	Click **Remove From Outlook Bar** on the shortcut menu. The confirmation screen will appear.
3	Click **YES**. The shortcut is removed.

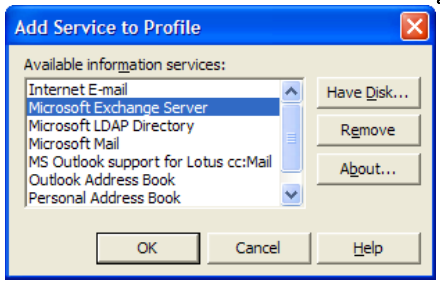
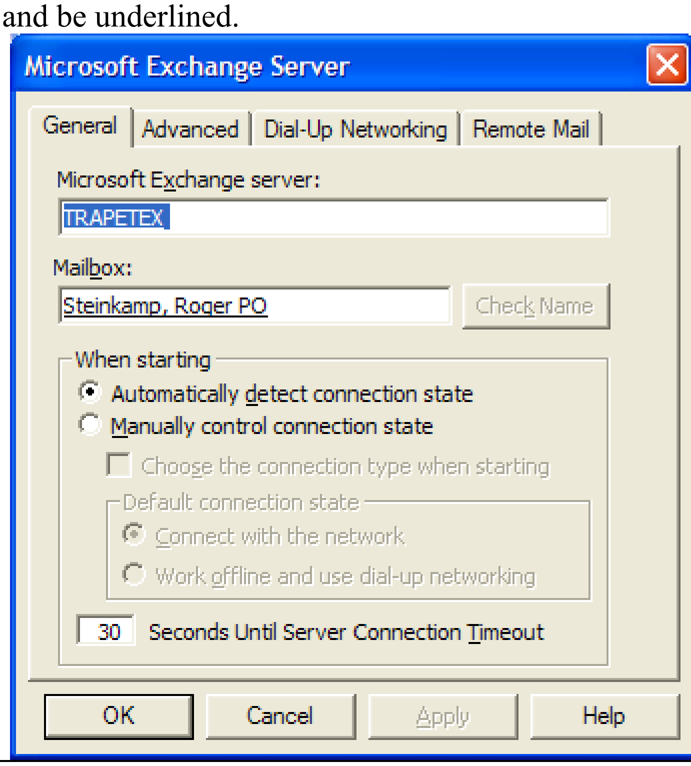
Move Your Personal Address Book Listing To The Top Of The List

Word of Caution:
If you are at all uneasy about making changes to your Outlook profile, it is suggested you perform these steps with a system administrator or someone else who has performed this function. Although you cannot lose any e-mail from performing these steps, you do stand a chance of “disconnecting” your user account from your e-mail. If this occurs, contact a System Administrator or the IRC for assistance.

Move your Personal Address Book Listing

This job aid will help you move your personal address book from the bottom of the Address book list to the top, just above the Global Address List.

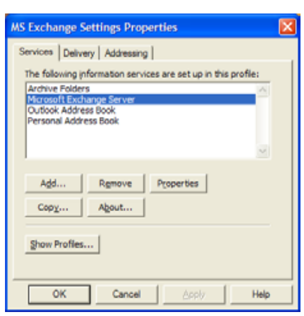
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1.</td><td>Close Outlook.</td></tr>
<tr><td>2.</td><td>Right-click the Outlook Icon on your desktop and select Properties.</td></tr>
<tr><td>3.</td><td>In the Information Services area of the window, click once on Microsoft Exchange Server to highlight it.

</td></tr>
<tr><td>4.</td><td>Click the Properties button.</td></tr>
<tr><td>5.</td><td>Click the Advanced tab.</td></tr>
<tr><td>6.</td><td>
<table>
<tr><th>If</th><th>Then…</th></tr>
<tr><td>There are entries in the “open these additional mailboxes” field of the window…</td><td>Write down the name of the mailboxes. You will have to reconnect to them later. Go to the next step.</td></tr>
<tr><td>There are no entries in the “open these additional mailboxes” field of the window…</td><td>Move on to the next step.</td></tr>
</table>
</td></tr>
</table>

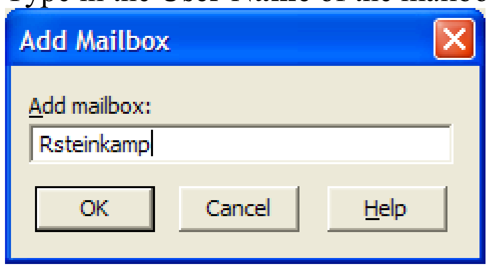
7.	Click the **Cancel** button.
8.	With Microsoft Exchange Server still highlighted, click the **Remove** button.
9.	Click **Yes** to confirm.
10	Click the **Add** button. The Add Service to Profile dialogue will open.
11	Click once on **Microsoft Exchange Server** to highlight it. 
12	Click the **OK** Button. The Microsoft Exchange Server dialogue will open.
13	Enter “**TRPETEX**” (or your exchange server) in the Microsoft Exchange Server field.
14	Enter your **User Name** in the Mailbox field. (The same name you use to sign onto the workstation.)
15	Click the **Check Name** button. Your full name should appear and be underlined. 

<table>
<tr><th></th><th></th></tr>
<tr><td>16</td><td>
<table>
<tr><th>If</th><th>Then…</th></tr>
<tr><td>Your full name appears…</td><td>Continue with the next step.</td></tr>
<tr><td>You get an error that the name could not be resolved…</td><td>Check the spelling of the Exchange server and your user name to insure they are correct.</td></tr>
</table>
</td></tr>
<tr><td>17</td><td>Click the OK button.</td></tr>
<tr><td>18</td><td>
<table>
<tr><th>If</th><th>Then…</th></tr>
<tr><td>In step 6 you wrote down the names of additional mailboxes to open…</td><td>Proceed to the section of this job aid labeled “Opening Additional Mailboxes”.</td></tr>
<tr><td>In Step 6 you did not write down the names of additional mailboxes to open…</td><td>Click the OK button to close the MS Exchange Settings window. You’re finished.</td></tr>
</table>
</td></tr>
</table>

Opening Additional Mailboxes

This job aid will show you how open additional mailboxes from your MS Outlook profile.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1.</td><td>Close Outlook.</td></tr>
<tr><td>2.</td><td>Right-click the Outlook Icon on your desktop and select Properties. The MS Exchange Settings Properties window will open.</td></tr>
<tr><td>3.</td><td>In the Information Services area of the window, click once on Microsoft Exchange Server to highlight it.

</td></tr>
</table>

<table>
<tr><td>4.</td><td>Click the Properties button.</td></tr>
<tr><td>5.</td><td>Click the Advanced tab.</td></tr>
<tr><td>6.</td><td>Click the Add button.</td></tr>
<tr><td>7.</td><td>Type in the User Name of the mailbox you want to open.

</td></tr>
<tr><td>8.</td><td>Click the OK button.</td></tr>
<tr><td>9.</td><td><table>
<tr><th>If</th><th>Then…</th></tr>
<tr><td>You get an error that the name cannot be resolved…</td><td>Be certain you are typing the name correctly. It must be spelled exactly as the user would sign onto a workstation.</td></tr>
<tr><td>There are no errors…</td><td>The name should have appeared in the Mailboxes field.</td></tr>
</table></td></tr>
<tr><td>10.</td><td>Click OK to close the Exchange Server dialogue box.</td></tr>
<tr><td>11.</td><td>Click OK again to close the MS Exchange Properties window.</td></tr>
</table>

Using Public Folder Favorites

Introduction

Adding folders to your Favorites Public Folder is a convenient way to organize information and quickly access shortcuts to items, documents, and other folders that you use frequently.

Follow these steps to add a favorite to Public Folders Favorites

Step	Action
1.	If the **Folder List** is not visible, click to the **Folder List** button to make it visible..
2.	Locate the public folder you want to add as a shortcut in Favorites. If you do not know how to locate public folders, please see the job aid **How to Locate TRACEN Public Folders**.
3.	On the **File** menu, trace to **Folder**, and then click **Add to Public Folder Favorites**. The **Add to Favorites** window will open.
4.	Click the **Add** button. The public folder will be added to your **Public Folders Favorites**.

Accessing Favorites

Follow these steps to access your Public Folders Favorites

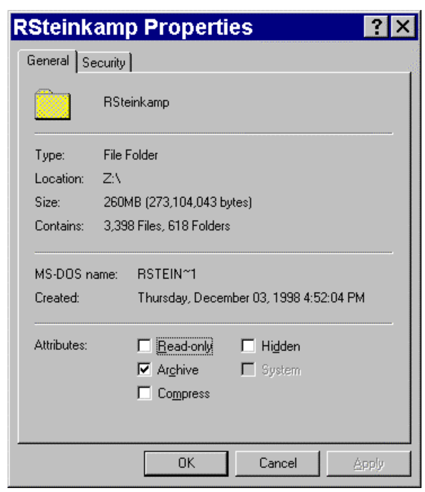
Step	Action
1.	Click the **Other** label on the **Outlook Bar**
2.	Click the **Public Folders** icon.
3.	In the **Folder List**, expand the list of subfolders by clicking the plus sign (+) beside **Public Folders**. The Folder list will expand to show **Favorites** and **All Public Folders**.
4.	Click **Favorites**. Your favorites will be displayed
5.	Click the folder you wish to view.

Compressing Your Outlook Archive File

Compressing the Outlook Archive folders can considerably reduce the amount of hard disk space used by your U:/ drive (My documents). In some cases as much as 100MB or more. It takes only a few simple steps to compress the folders.

See how much space you are using before compressing

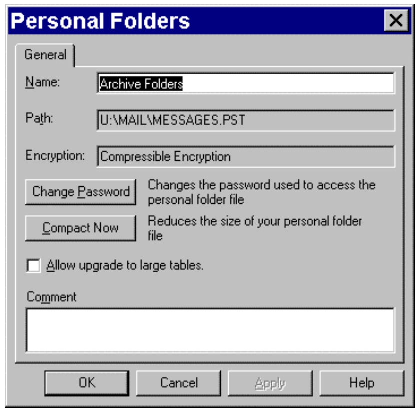
This job aid will show you how to check the amount of hard disk space your Outlook Archive file is using before you compress it. This is a good way to compare "before and after".

Step	Action
1.	Double click on the Icon with your name under it on your desktop.
2.	Scroll down to the Icon with Users in the title and right click on it.
3.	Locate the folder with **your name** on it and **right click** once on it.
4.	Trace to and select **Properties**. About half way down the properties window will be the size information. 

Compress the archive file

This job aid will show you how to compress the Outlook Archive file.

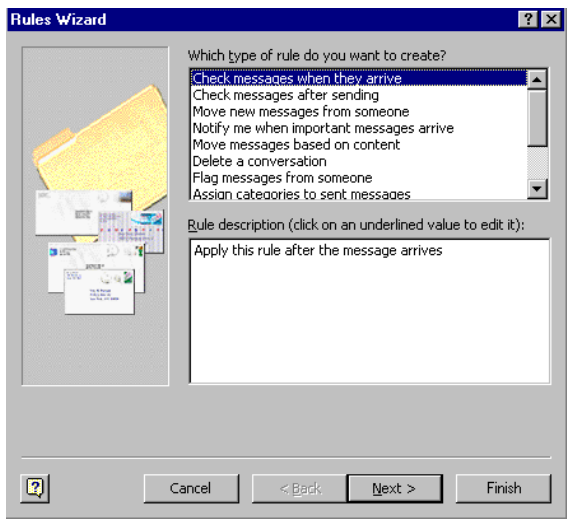
Step	Action
1.	Make sure Outlook is closed (not running).
2.	**<u>Right click</u>** on the Outlook Icon on your desktop.
3.	Trace to **properties**, click on **Services tab**.

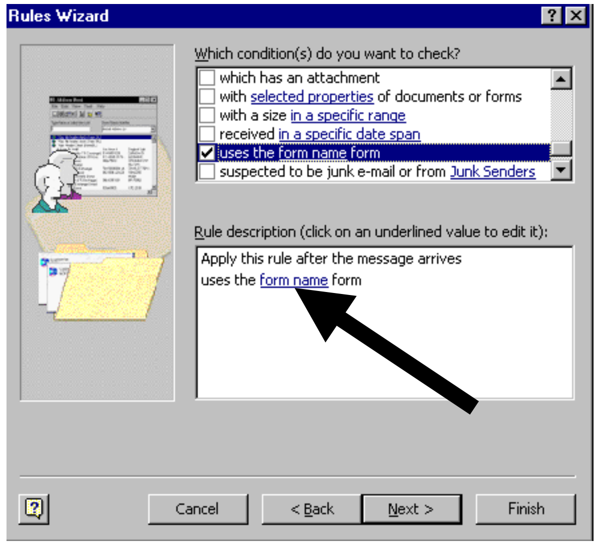
4.	Double click the **Archive Folders** file. This file may alternatively be named **~messages.**
5.	Select the **Compact Now** button. 
6.	It may take as much as 10 minutes to compact the file, depending on the original size. Try looking at the file size by using the steps outlined at the beginning of this Jobaid to see how much space you saved.

Setting Up Task Manager in Outlook

Introduction

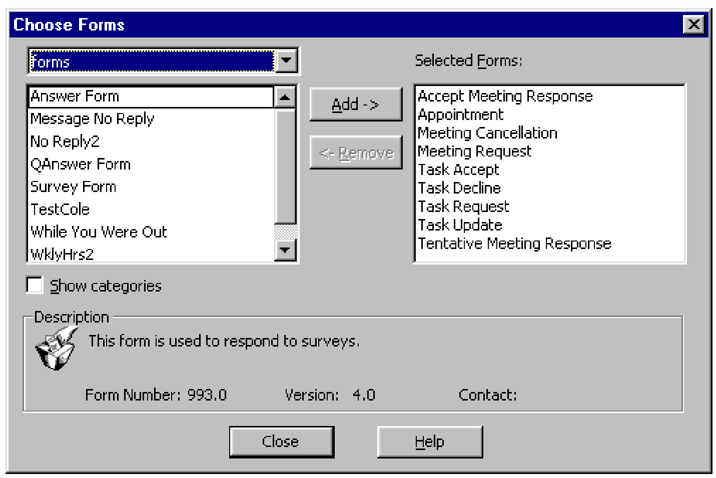
This Job Aid will show you how to organize Microsoft Outlook to properly use Tasks. **It is imperative that every individual who will be sharing tasks complete this Task Manager Set Up in order for Task Manager to work properly.**

Step	Action
1.	Outlook by double clicking on the **Microsoft Outlook** icon on your desktop.
2.	On the menu bar click **Tools** and trace to **Rules Wizard**.
3.	It will ask you to choose which **set of rules** to use **Client or Server. <u>Choose Server.</u>**
4.	Click **New.** The Rules Wizard screen is displayed. 
5.	Highlight **Check messages when they arrive** from the top window by clicking it once.
6.	Click **Next**.
7.	Scroll down and select **Uses the <u>form name</u> form** by clicking in the check in the box next to the option.
8.	After you have checked the appropriate box in the top window, click on **<u>form name</u>** in the bottom window.



9. Select **Application Forms** from the form pull down menu.

10 From the Application Form menu **Select** and click **Add** for the following (7) items: **Accept Meeting Response, Decline Meeting Response, Task Accept, Task Decline, Task Request, Task Update, Tentative Meeting Response**

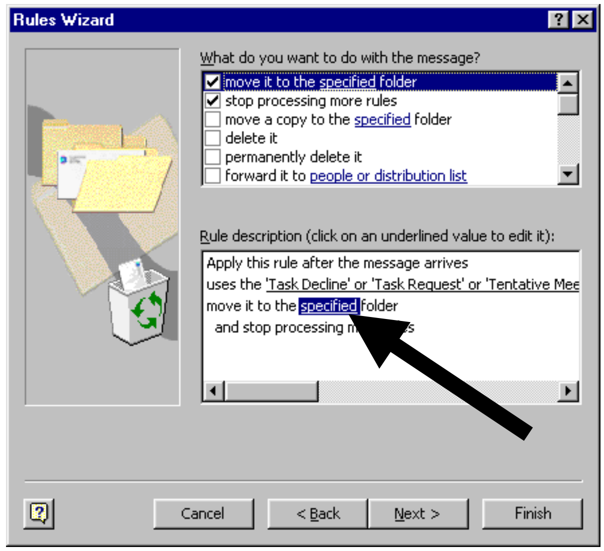
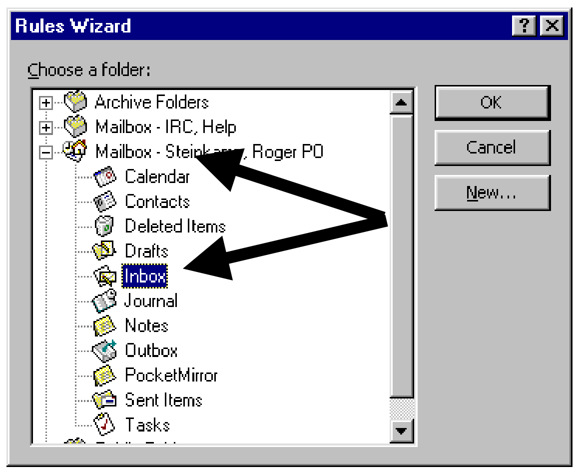


11 Click **Close.**

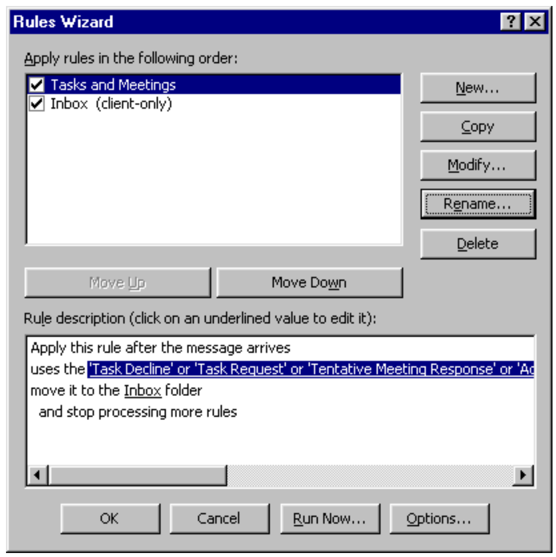
12 Click **Next**.

13 Select **move to a specified folder** by clicking in the check in the box next to the option.

14 Click on **specified** in the bottom window.

	
15	Select **Inbox** under **Outlook Today.** Ensure that the highlighted **Inbox** is in your Mailbox (last name, first name) and not the one in your ~Messages/Archive folders. Then click **OK.** 
16	Select **stop processing more rules** by clicking in the check in the box next to the option.
17	Click **Next**. The Exception Dialogue will open.
18	No Exceptions are necessary. Click **Next**.
19	In the box named "Please Specify A Name For This Rule", overtype the name with **Tasks and Meetings**.
20	Click **Finish**.
21	**Check** to make sure that "**Tasks and Meetings**" is at the top of the Rules Wizard window list.

If…	Then…
“Tasks and Meetings” is not at the top of the Rules Wizard list…	**Highlight** “Tasks and Meetings” by clicking on it once. Use the Move Up/Move Down buttons located under the window, move the rule to the top of the list.
“Tasks and Meetings” is at the top of the Rules Wizard list…	Click **OK.**

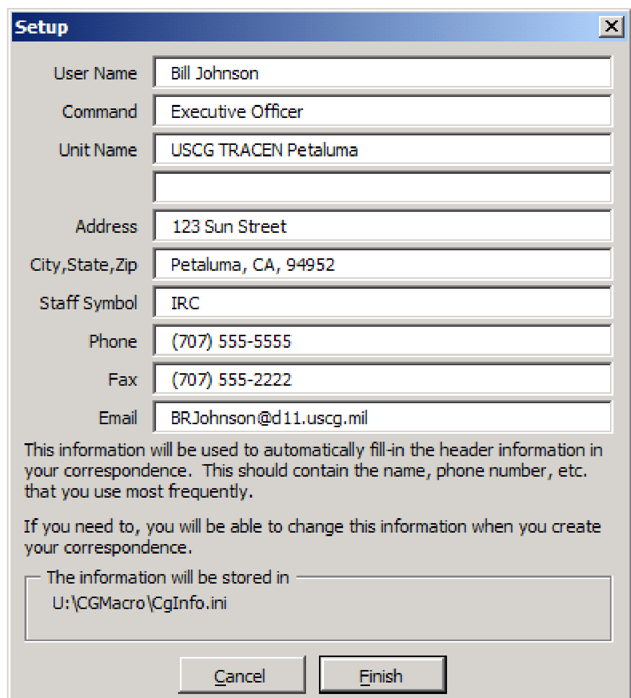


The task manager is now set up correctly.

Setting Up CG Macros II

USCG Macros II Templates

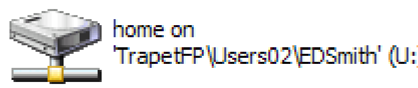
USCG Macros II templates were designed to generate standard Coast Guard letters and memorandums, making the entire process of preparing Coast Guard correspondence much easier. This job aid will show you how to set up USCG Macros II in Microsoft® Word.

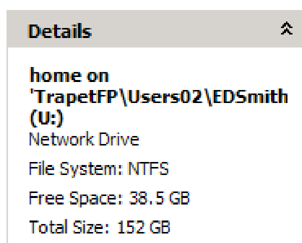
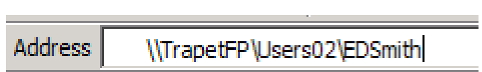
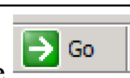
Step	Action
1.	On the **Start** menu, point to **Programs** then click on **Microsoft Word.**
2.	Click **File** and then click **New…**
3.	Click on the tab that says **USCGMacrosII** and double click **CGSetUp.dot**
4.	You will be taken to the **Setup** window. Fill out this form with the correct information. 
5.	Click **Finish**.
6.	Again use the **File** menu and click **New…**
7.	Click the tab that says **USCGMacrosII**.
8.	Double click the type of **correspondence** you wish to create.

Determining Your File Server

Finding Your File Server

Many times in order to accomplish basic network tasks, you must first know your file server. This job aid will show you how to determine the location of your file server.

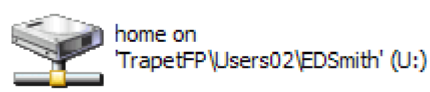
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1.</td><td>On the Desktop open My Computer.</td></tr>
<tr><td>2.</td><td>Click once on your U: drive. It should look something like this:

</td></tr>
<tr><td>3.</td><td>In the left-hand information pane you should see a Details bar:</td></tr>
<tr><td>4.</td><td>
<table>
<tr><th>If</th><th>Then…</th></tr>
<tr><td>The details bar looks like this:

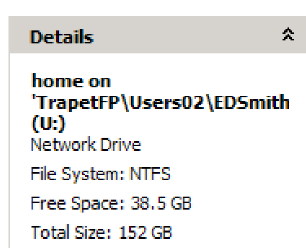
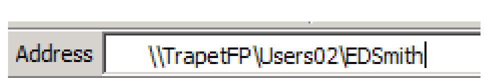
</td><td>Click once on the  arrows</td></tr>
<tr><td>The details bar looks something like this:

</td><td>Continue to the next step</td></tr>
</table>
</td></tr>
<tr><td>5.</td><td>In the Address Bar near the top of the window type \\ and then the rest of the information you see in single quotes in the Details information pane. After you finish, it should look something like this:

</td></tr>
<tr><td>6.</td><td>Press the Enter key or click the 
 button</td></tr>
<tr><td>7.</td><td>You are now in the folder of your file server. The address in the Address bar can be used to access your file server from a variety of programs.</td></tr>
</table>

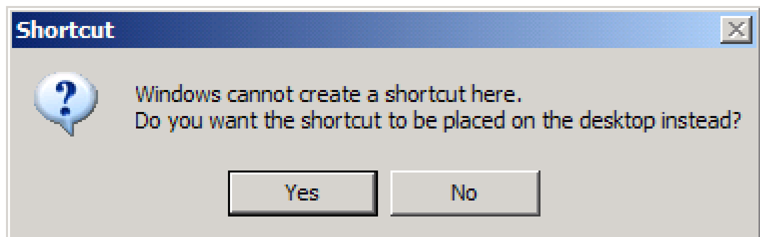
Accessing Your Public Folder

Your Public Folder

The public folder is the opposite of the U:\ drive or My Documents. When you put something in your public folder you are inviting other users to look at the information you put there. For example: you may have a digital picture you want to share; rather than e-mailing a 3MB picture to people who may or may not want it, just put it in your public folder and tell people it is there. They can choose to take copy or not. Or perhaps you're working on a project with multiple people, or you have to publish a schedule. In order to share information (files, etc.) with other users, you need to place that information in your Public folder. This job aid will show you how to determine the location of your public folder, and place a shortcut to it on your desktop. Also see the job aid entitled **Determining Your File Server**.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1.</td><td>On the Desktop open My Computer.</td></tr>
<tr><td>2.</td><td>Click once on your U: drive. It should look something like this:

</td></tr>
<tr><td>3.</td><td>In the left-hand information pane you should see a Details bar:</td></tr>
<tr><td>4.</td><td><table>
<tr><th>If</th><th>Then…</th></tr>
<tr><td>The details bar looks like this:

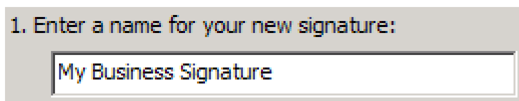
</td><td>Click once on the  arrows</td></tr>
<tr><td>The details bar looks something like this:

</td><td>Continue to the next step</td></tr>
</table></td></tr>
<tr><td>5.</td><td>In the Address Bar near the top of the window type \\ and then the rest of the information you see in single quotes in the Details information pane. After you finish, it should look something like this:

</td></tr>
</table>

	Note: This is referred to as your "user share" or "file server". For others to access your public folder you will have to tell them your file server information.
6.	Press the **Enter** key or click the  button
7.	You are now in the folder of your file server. The address in the **Address** bar can be used to access your file server from a variety of programs.
8.	Right click on the **Public** folder and select **Create Shortcut**.
9.	You should see a dialog box like this: 
10	Click **Yes**.
11	You can now access your **Public** folder – it's called **Shortcut to Public** – from the **Desktop**. Simply drag the files you want to share into this folder.

Creating an Auto Signature in Outlook

Auto Signature The Signature feature in Microsoft® Outlook is used to append your contact information to the end of your e-mails.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1.</td><td>On the Start menu point to Programs, then click on Microsoft Outlook.</td></tr>
<tr><td>2.</td><td>Use the Tools menu and click on Options…</td></tr>
<tr><td>3.</td><td>Click the Mail Format tab and click Signature Picker…</td></tr>
<tr><td>4.</td><td>Click New…</td></tr>
<tr><td>5.</td><td>Enter a name for your Signature in the field:



</td></tr>
<tr><td>6.</td><td><table>
<tr><th>If</th><th>Then…</th></tr>
<tr><td>You have no pre-existing file to create your signature</td><td>Click the button that says Start with a blank signature:</td></tr>
<tr><td>You have a pre-existing file you want to use for your signature</td><td>Click the button that says Use this file as a template: and browse to the file</td></tr>
</table></td></tr>
<tr><td>7.</td><td>Enter all the necessary information and click Finish</td></tr>
<tr><td>8.</td><td>Click OK</td></tr>
<tr><td>9.</td><td><table>
<tr><th>If</th><th>Then…</th></tr>
<tr><td>You want the signature to appear on every one of your e-mail messages.</td><td>Uncheck the box that says Don’t use when replying or forwarding.</td></tr>
<tr><td>You don’t want the signature to appear when you are forwarding or replying to e-mail messages.</td><td>Make sure the box that says Don’t use when replying or forwarding is checked.</td></tr>
</table></td></tr>
<tr><td>10</td><td>Click OK. Your signature will - by default – be placed at the end of the e-mail messages you send.</td></tr>
</table>

Setting Up Auto Archive in Outlook

Auto Archive

Auto Archive is a feature within Microsoft® Outlook that automatically archives or deletes mail after a specified period of time. This job aid will show you how to set up the Auto Archive feature.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1.</td><td>On the Start menu point to Programs, then click on Microsoft Outlook.</td></tr>
<tr><td>2.</td><td>On the Tools menu and click on Options…</td></tr>
<tr><td>3.</td><td>Click the Other tab and click Auto Archive.</td></tr>
<tr><td>4.</td><td>Select the AutoArchive every check box.</td></tr>
<tr><td>5.</td><td>Specify the number of days between Archives by entering a number in the days box.

Suggestion: No less than once a week.</td></tr>
<tr><td>6.</td><td>Check the Prompt before AutoArchive box to be notified before each Auto Archive. This will produce a notification on the screen when the auto archive is going to run.</td></tr>
<tr><td>7.</td><td>Click OK.</td></tr>
<tr><td>8.</td><td>Right click on a folder for which you want to set the AutoArchive properties (e.g. Sent Items), and then click Properties.

Note: It is most important to set the AutoArchive properties for the Sent Items and Deleted folders in both the default mail folder and the ~Messages or Archive folder.</td></tr>
<tr><td>9.</td><td>Click on the AutoArchive tab.</td></tr>
<tr><td>10</td><td>Click on the Clean out items older than box and enter a number and select a unit for time.

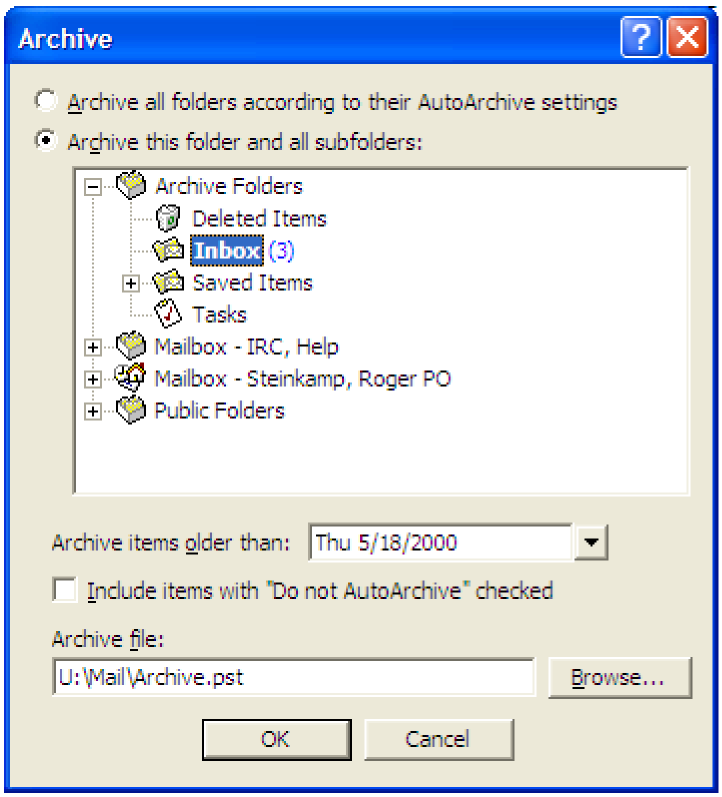

</td></tr>
<tr><td>11</td><td><table>
<tr><th>If…</th><th>Then…</th></tr>
<tr><td>You want to archive the files</td><td>Choose Move old items to: and browse to a location for the files (the default location is ‘U:\Mail\Messages.pst’).</td></tr>
<tr><td>You want to delete the files</td><td>Choose Permanently delete old items.</td></tr>
</table></td></tr>
</table>

12	Click **OK**.

Forcing An Archive

It is possible to force Auto Archive to run at any time, regardless of the time interval you chose between archives. This job aid will show you how to force an Archive.

Step	Action
1.	On the Start menu point to Programs, then click on **Microsoft Outlook**.
2.	On the File menu and click on **Archive…**



Step	Action
3.	Choose the settings you desire and click **OK**.

Setting Security Permissions in Windows XP

Setting Permissions

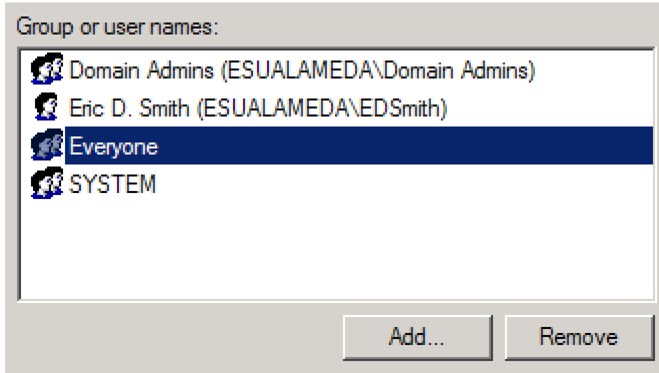
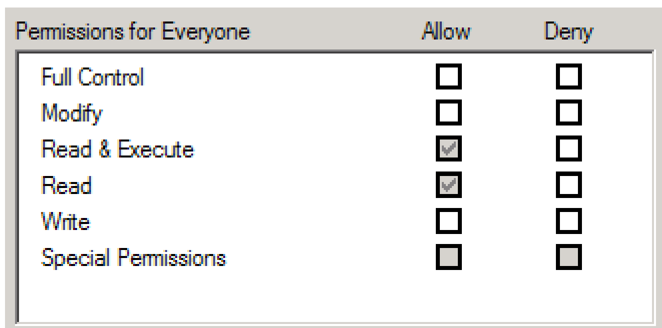
Setting permissions to folders and files within Windows XP will allow the owner (creator) to control *whom,* and what *type* of access is granted. Security in Windows XP is based on implicit and explicit permissions, and can prove be a complex issue. Describing in detail how Windows XP Security works is beyond the scope of this Job Aid.
The chart on the last page of this Job Aid describes the different types of access permissions.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1.</td><td>Right Click on the File Name or Folder that you wish to set permissions to.</td></tr>
<tr><td>2.</td><td>Select Properties from the menu list.</td></tr>
<tr><td>3.</td><td>Select the Security tab.</td></tr>
<tr><td>4.</td><td>
<table>
<tr><th>If…</th><th>Then…</th></tr>
<tr><td>You wish to change existing permissions…</td><td>Move to the section labeled Change Permissions.</td></tr>
<tr><td>You wish to add permissions…</td><td>Move to the section labeled Adding Users / Permissions.</td></tr>
<tr><td>You wish to remove permissions…</td><td>Move to the section labeled Removing Users / Permissions.</td></tr>
<tr><td>You wish to find out more about advanced permissions…</td><td>Move to the section labeled Advanced Permissions.</td></tr>
</table>
</td></tr>
</table>

Change Permissions

This section will guide you through the steps required to change (replace) existing permissions for a directory (folder) or file.

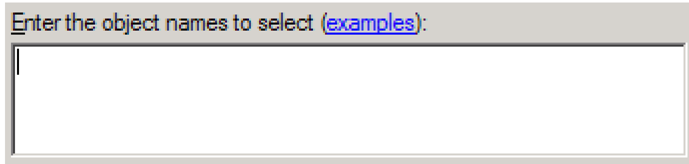
Step	Action
1.	In the **Group or user names:** field of the Security dialogue box, click on the **Name** you wish to change permissions to.

<table>
<tr><td></td><td>
</td></tr>
<tr><td>2.</td><td>In the field below, entitled Permissions for <group or user name>, select the desired options. Check ALL that apply. Use the chart on the last page if this Job Aid as a guide to the various options.

</td></tr>
<tr><td>3.</td><td>Select OK.</td></tr>
</table>

Add Users / Permissions

This section will guide you through the steps required to add users and permissions for a directory (folder) or file.

Step	Action
1.	Select the **Add**… button. The Add Users and Groups dialogue box will open.

<table>
<tr><td>2.</td><td>In the field entitled Enter the objects names to select, type in the Account Name of the person you wish to add.
</td></tr>
<tr><td></td><td>Note: The account is based on the users SWIII log-in name.

<u>For example</u>: The user to add is John Doe. John's account name (how he logs into the system) is Jdoe. Hence, you would type Jdoe into the field.

The Account Name must be an EXACT match, or the search function will not locate the account.</td></tr>
<tr><td>3.</td><td><table><tr><th>If…</th><th>Then…</th></tr><tr><td>You know the Domain the user is located in…</td><td>You can narrow the search by clicking on the Locations… button and then the name of that domain to highlight it.</td></tr><tr><td>You do not know the Domain the user is located in…</td><td>Simply move on to the next step.</td></tr></table></td></tr>
<tr><td>4.</td><td>Select the Check Names button. The User Name will appear in the search field.</td></tr>
<tr><td>5.</td><td><table><tr><th>If…</th><th>Then…</th></tr><tr><td>The correct name appeared in the field…</td><td>Move on to the next step.</td></tr><tr><td>The incorrect name appeared on the field…</td><td>Select the Cancel button and return to step 2.</td></tr></table></td></tr>
<tr><td>6.</td><td><table><tr><th>If…</th><th>Then…</th></tr></table></td></tr>
</table>

	You wish to add more names…	Click inside the **Enter the objects names to select** field and delete the name. Repeat steps 2 through 6.
	You have all the names you wish to add to the list of permissions…	Move on to the next step.

7.	**Highlight** all the names in the Search Results field by holding down the Shift key, and selecting each name in the list. Any name that is not highlighted WILL NOT be added.
8.	Select the **OK** button. The Select Users or Groups dialogue box will close, and the selected names will show in the Add Names field of the Add Users and Groups dialogue box.
9.	**Select** the desired type of access from the list of choices. *Refer to the change permissions section*.
10.	Select the **OK** button.

Remove Users / Permissions

This section will guide you through the steps required to remove users and permissions for a directory (folder) or file.

Step	Action
1.	Highlight the **Users Name** from the list in the Name field. (One click of the left mouse button).
2.	Select the **Remove** button.
3.	
4.	In the Properties dialogue box, select **OK**.

Step 3:

If…	**Then…**
You wish to remove more Users…	Repeat Steps 1 and 2.
You are finished removing Users…	Move on to the next step.

Advanced Permissions

This section will guide you through the advanced properties of permissions.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1.</td><td>Under the Security tab click Advanced.</td></tr>
<tr><td>2.</td><td>
<table>
<tr><th>If…</th><th>Then…</th></tr>
<tr><td>You wish to add/edit/remove Users…</td><td>Use the appropriate buttons under the Permissions tab</td></tr>
<tr><td>You wish to view the owner or change the owner of the file/folder…</td><td>Click on the Owner tab. Depending on your Permissions you may be able to view or change the owner.</td></tr>
<tr><td>You wish to view the permissions that are given to a certain user…</td><td>Click on the Effective Permissions tab. Click the Select… button to select the user for which you wish to see permissions.</td></tr>
</table>
</td></tr>
<tr><td>3.</td><td>Click OK and click OK again.
Note: See the end of this job aid for more information concerning Inheritance and how it affects permissions.</td></tr>
</table>

Special Access **File and Folder** Permissions

You can set the following individual directory permissions when creating special access permission for directories:

Special Permissions	Full Control	Modify	Read & Execute	List Folder Contents (for folders only)	Read	Write
Traverse Folder/Execute File	x	x	x	x		
List Folder/Read Data	x	x	x	x	x	
Read Attributes	x	x	x	x	x	
Read Extended Attributes	x	x	x	x	x	
Create Files/Write Data	x	x				x
Create Folders/Append Data	x	x				x
Write Attributes	x	x				x
Write Extended Attributes	x	x				x
Delete Subfolders and Files	x					
Delete	x	x				
Read Permissions	x	x	x	x	x	x
Change Permissions	x					
Take Ownership	x					
Synchronize	x	x	x	x	x	x

**For more information use the Windows Help and look under 'Access Control'*

How **inheritance** affects file and folder **permissions**

After you set permissions on a parent folder, new files and subfolders that are created in the folder inherit these permissions. If you do not want them to inherit permissions, select **This folder only** in **Apply onto** when you set up special permissions for the parent folder. In cases where you want to prevent only certain files or subfolders from inheriting permissions, right-click the file or subfolder, click **Properties**, click the **Security** tab, click **Advanced**, and then clear the **Inherit from parent the permission entries that apply to child objects. Include these with entries explicitly defined here.** check box.

If the check boxes appear shaded, the file or folder has inherited permissions from the parent folder. There are three ways to make changes to inherited permissions:

- Make the changes to the parent folder, and then the file or folder will inherit these permissions.
- Select the opposite permission (**Allow** or **Deny**) to override the inherited permission.
- Clear the **Inherit from parent the permission entries that apply to child objects. Include these with entries explicitly defined here.** check box. You can then make changes to the permissions or remove the user or group from the permissions list. However, the file or folder will no longer inherit permissions from the parent folder.

In most cases, **Deny** overrides **Allow** unless a folder is inheriting conflicting settings from different parents. In that case, the setting inherited from the parent closest to the object in the subtree will have precedence.

Only inheritable permissions are inherited by child objects. When setting permissions on the parent object, you can decide whether folders or subfolders can inherit them with **Apply onto**.