

Outlook, Quickbooks tips for top performance



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One of my most consistent activities during the week is checking on the backup operations at all my client sites. Any time I get called out to fix or address some computer issue, I also peek at the backup logs or the size and modification date of the backup save sets. This is probably the most important duty I have.

Besides all the MS Word and Excel spreadsheets, the most critical file types I make sure to get backed up are the MS Outlook and Quickbooks databases. The Outlook file is a single database with a .PST file extension that contains all email messages, contacts, calendar events, and notes of a user. The Quickbooks file has a .QBW file extension and holds all the financial transaction data of a company.

Both of these files can grow quite large as the months and years roll along. The more ac-

tivity occurs — the quicker the files will increase in size. After some point the file sizes can become a performance problem, and finally if they grow too big can become dysfunctional.

Today we will discuss how to better manage these mission critical files and keep their sizes from becoming a problem.

First let's look at the Microsoft Outlook PST file since so many of my clients use this application for their email, scheduler and contact management. This single file can easily grow to several hundred megabytes and many of my clients have grown this file to numerous gigabytes.

That is when size definitely can become a performance problem.

A good rule of thumb to the maximum size of the PST is around of 1-3 gigabytes. To check your Outlook PST file size you

will have to dig deep and find it under Windows XP down in the Documents and Settings directory, the username, Local Settings, Application Data, Microsoft, and finally the Outlook folder.

You can check the file size by viewing it in the details mode. Before you ever try to compact or migrate this file in any way, you will want to make a backup copy of it to an external hard drive or at least another directory on that same disk.

The procedure I use to compact and decrease the size of the MS Outlook involves first archiving the prior year's data into separate PST files. This is done within Outlook by creating folders named with the year under Personal folders.

For example, this January I created a 2007 folder and then two other folders inside named Inbox and Sent. Then I moved all the mail from my current Inbox and Sent folders to those under the 2007 folder tree.

After that was completed, I exported the whole 2007 folder and all its contents to a new PST file called 2007Outlook.PST by going under File — Import and Export Data and then picking the PST export option. Finally after completing the export and then restarting the Outlook, I deleted the previously exported 2007 folder within Outlook.

Even after removing all the data the size of the Outlook PST file was still the same. This is because we need run the com-

paction processes to recover the space made by removing all that 2007 e-mail.

This is done clicking on File—Data File Management and then on Settings. From that point you click on the Compact Now button and get ready to wait a long time depending on the original file size. Since mine was over 4 GB I started it right before I went to bed at 11 p.m. and it finished at 3 a.m. When I woke up the compaction process was complete and the new size was a much smaller 1.5 GB.

Outlook started up much quicker and the overall performance was better. I have used this procedure for the past five years, and now I have each year's e-mail separated into those archive files that can still be accessed

with Outlook in case I ever need to view an email received or sent by my main computer.

The Quickbooks financial application migrated to a SQL database in the 2006 version and has been a bit of a pain to deal with relating to sharing and file management. Just last month I had to work on a 500 MB Quickbooks QBW file that had become too big to function correctly.

First I made a directory and copied that huge Quickbooks database under the name All-Data-2001-2008.QBW for archival purposes. Next I started up Quickbooks 2007 and clicked on File—Utilities—Clean Up Company Data. From there I chose the cleanup date which deletes all transactions prior to that date.

This clean up process runs

a very long time and will open and close the database numerous times. Even after it completed an hour later, the file size was still around 500 MB. I then called Quickbooks support and they told me that's just how things are and said there was no way to decrease the size of the file.

After hitting the roof and fussing at Intuit support yahoo for a half an hour, I gave up and called my Quickbooks consultant who originally taught me the application and helped me set up the accounting for Deans Consulting.

My guy showed me a quick trick using the Portable company process to decrease the size of the Quickbooks database. Basically I went under File—Save

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Copy or Backup and chose the Portable Company File option. This exported the remaining data to the Portable format and then I restarted Quickbooks.

Next I clicked on File—Open or Restore Company and chose the Restore a Portable File option which imported the previously exported Portable Company file I had created.

After that import process was completed and overwrote the original Quickbooks Company file, the size was less than a third the size at 150 MB.

Quickbooks started up quickly with that newly compacted company file and ran much faster so the client was happy. They can still open up that older larger file I had saved for them if they need to review any legacy financial data for reporting or tax purposes.

Bottom line: Critical files like Outlook PST and Quickbooks QBW databases need to be cleaned and compacted on a routine basis to keep the performance good and the stability solid.

Next week's column: Internet 2.

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