

The Archive Feature in Outlook 2003

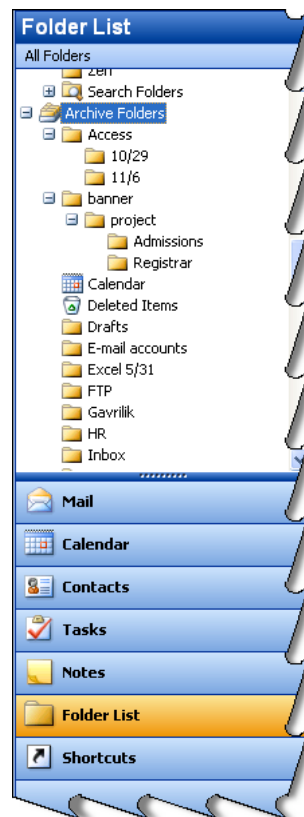
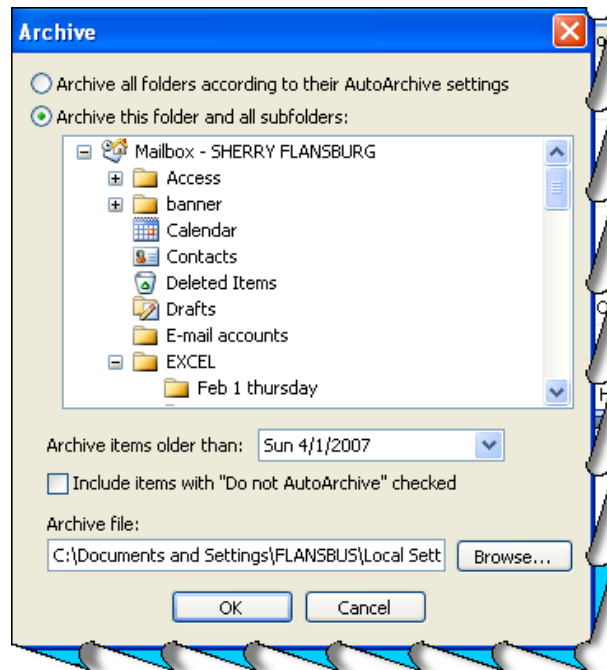


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Clogged Mailboxes

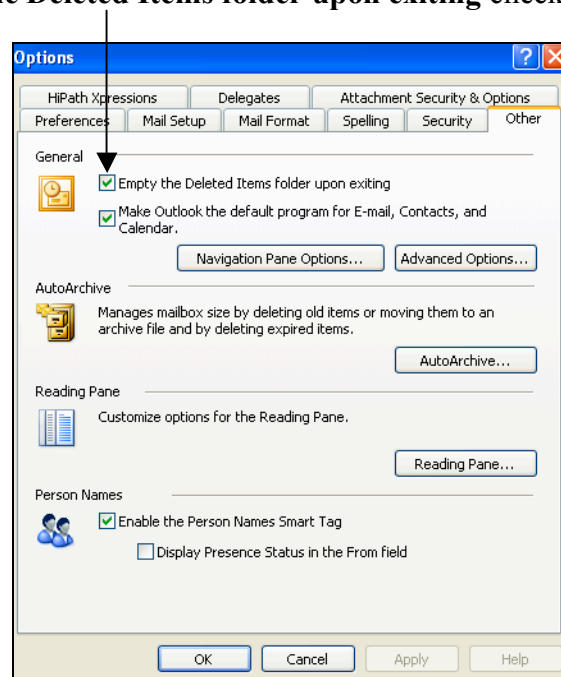
The more we use Outlook, the more we create, receive and accumulate files that increase the size of our mailbox. The file size can increase pretty quickly if you use certain options such as the journal or have large file attachments or rarely delete sent items.

You want to maintain the smallest Outlook data file as possible because your mailbox resides on the server, which is shared space for everyone in the Saint Rose community. Some of us may have received an email message from the system administrator advising us that we are over the limit. This is a call for some spring cleaning! There are several things you can do to reduce the size of your mailbox.

Empty Deleted Items folder upon exiting

Some preventative measures you can take are to **Empty Deleted Items folder** on a regular basis. By selecting this option, Outlook automatically empties your deleted items folder every time you close out of Outlook. This is the equivalent to the garbage taking away your garbage everyday.

1. From the menu bar select **Tools, Options**. Click on the **Other** tab.
2. Select the **Empty the Deleted Items folder upon exiting** check box. Click **OK**.

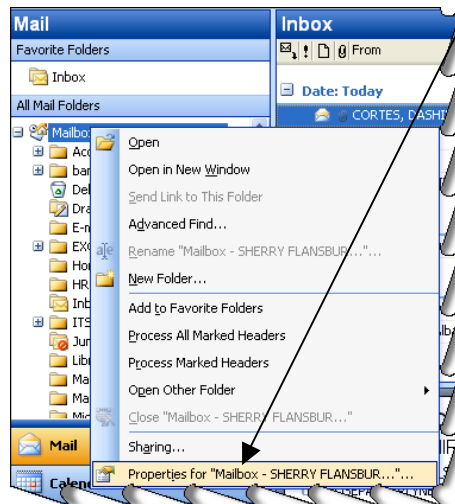


3. You should also periodically **empty or archive your Sent items folder**.
4. Lastly, but certainly not least, you should Archive your files frequently in order to maintain a reasonable file size in Outlook.

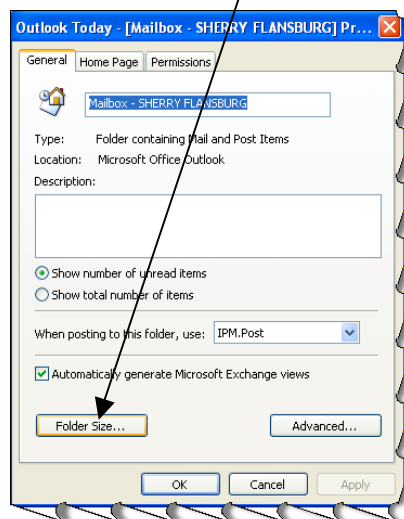
Mailbox Size Properties

Your mailbox is limited to an average of 50MB of space. How do you know how much space your mailbox is taking up? To view this information for your entire mailbox, right-click on the folder at the top of your folder list, called Mailbox - user name. Look at its properties.

1. In your folder list **right-click on your mailbox**. Select **Properties for Mailbox**.



2. In the Outlook Today dialog box select **Folder Size**.

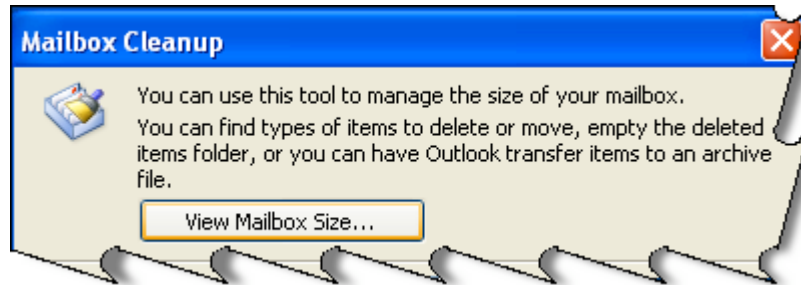


3. This will display the folder size dialog box. This dialog box will display two tabs if in Cached Exchange mode, which is the default installation of Outlook at St. Rose.

Cached Exchange Mode creates a copy of your mailbox and stores it on your computer. This copy provides quick access to your data and is frequently updated with the mail server. If you work offline, whether by choice or if there is a connection problem with the Exchange server, you can still access your data. When the connection is restored, Microsoft Outlook automatically switches back to connected mode. Any changes you made while offline are automatically synchronized once connected.

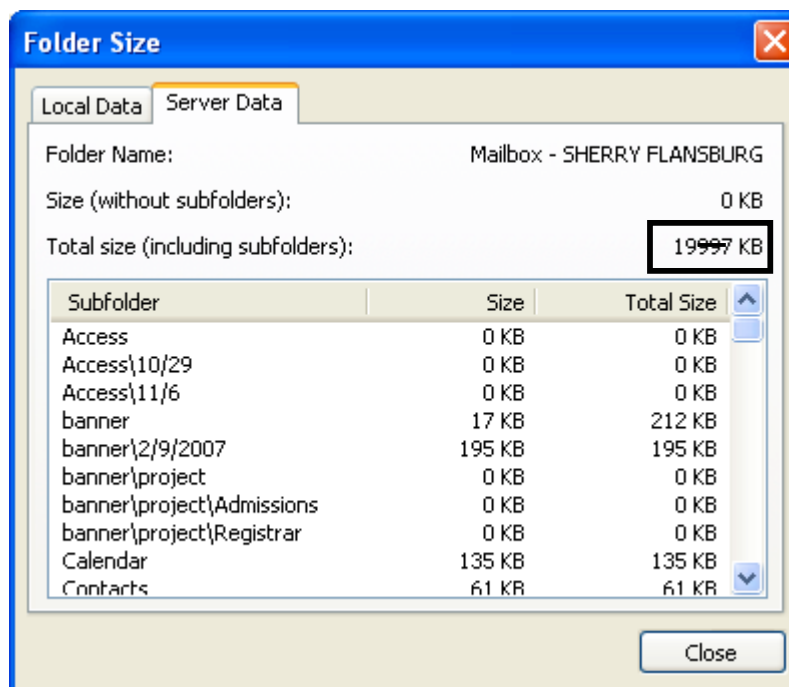
View Mailbox Size

You can also go to Tools → Mailbox Cleanup → View Mailbox Size.



This will display the folder size for your mailbox and subfolders. Below is an example of the folder size dialog box for a cached Exchange mode folder stored on the Exchange Server. It has two tabs Local Data and Server Data. For the most part, these two tabs should display the same sizes for the folders listed. Click the **Server Data** tab.

- * Your folder size should be under 50MB. If your folder size is over 50MB, you can tell where the culprit lies by looking in the folder size dialog box list. You can then choose to delete items out of those folders, or archive.
- * An easy conversion is to take off the last 3 numbers. For example, I have a total mailbox size of 19997KB. This converts to about 20MB.
- * For your reference 1,024 kilobytes equals 1 Megabyte.



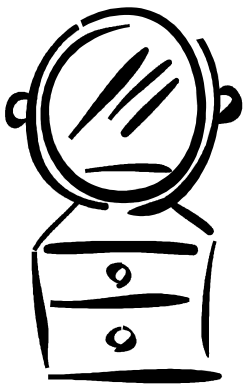
Archiving

In Outlook, archiving is a way to back up or delete old items, such as e-mail messages, appointments, tasks, journal entries, and notes. If you use Outlook frequently, you will accumulate a lot of information – usually e-mail messages. There are three main reasons to archive items in Outlook:

1. To reduce email glut.
2. Store items out of the way (such as those related to a past project) that you might not need at the moment, but may need to refer to them in the future.
3. To maintain a small mailbox size that takes up less space on the server.

Archiving your messages will move them from the server unto your local computer. Archived messages are moved from your inbox to a special data file called **archive.pst** which is stored on your local drive and can only be displayed in Outlook.

Folder structure



An identical folder structure exists between the archive file and your mailbox. Folders are left in place after being archived, even if they are empty.

You work with the items the same way you work with items in your main mailbox.

- * The subfolders in the Archive **mirror** the Mailbox.

Attachments

- * Any files attached to an email such as a Microsoft Word document are also archived within the e-mail message.

To view an online tutorial at the Microsoft website on this topic go to:

<http://office.microsoft.com/training/training.aspx?AssetID=RC010265551033>

There are two sets of Auto Archive settings this class will cover.

- * global (or default) settings
- * per-folder settings

Manual Archive

With a manual archive you can archive a particular folder using the default settings or specify the folder and date in which to archive folders older than.

1. From the menu bar select **File, Archive**.
2. The archive dialog box appears. Select the desired options detailed below. Click **OK**.
3. In the bottom right hand corner of your status bar, an archiving icon displays indicating that Outlook is archiving.

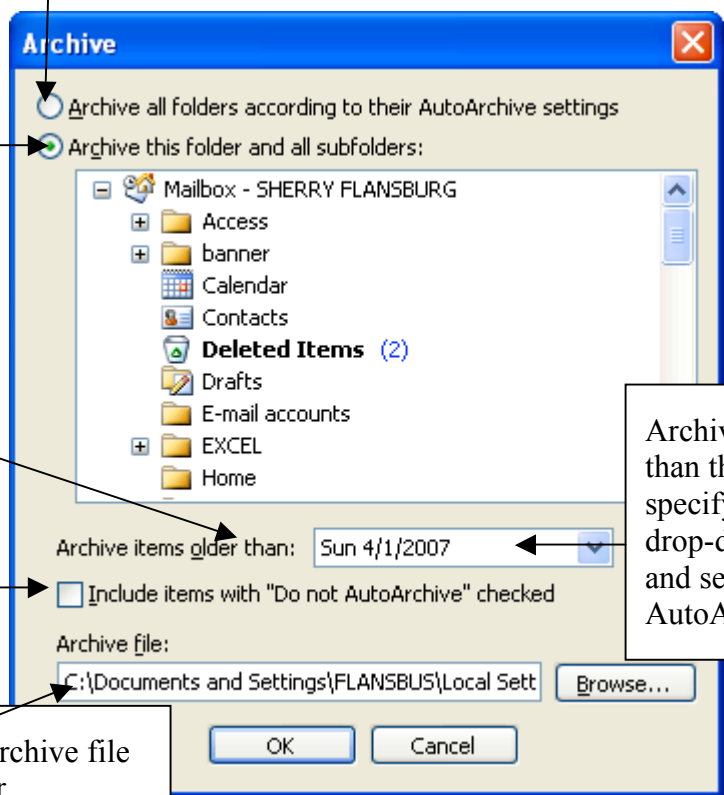


Moves items to the archive file based on the default or individual settings for each folder.

Select the folder you want to archive.
It archives items in the selected folder that are older than the date you specify.

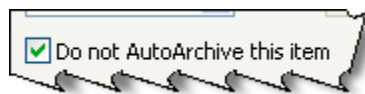
Archives items for which you have “Do Not AutoArchive this item” selected. Thereby, overriding the setting.

The Location where the Archive file is stored on your computer.



Archives items older than the date you specify here. Click the drop-down calendar and select the AutoArchive date.

Note: To exclude an item from being archived, select the “Do Not AutoArchive” property for an individual item. Open the item and choose **File, Properties**, then check the “Do not AutoArchive this item” box.

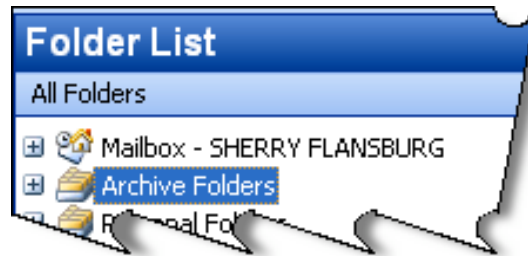


View Archive Folders

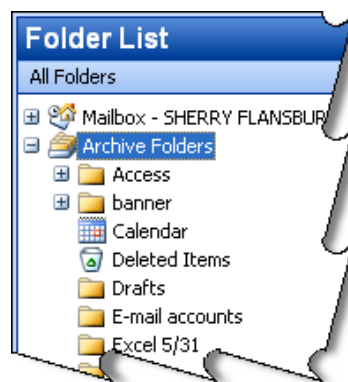
Outlook archived files (.pst files) are data files saved in a special format and can only be opened using Outlook. After Outlook archives items for the first time, you can access items in the file directly from Archive Folders in your Outlook Folder List.

* If the Folder List is not visible, select Folder List from the Go menu.

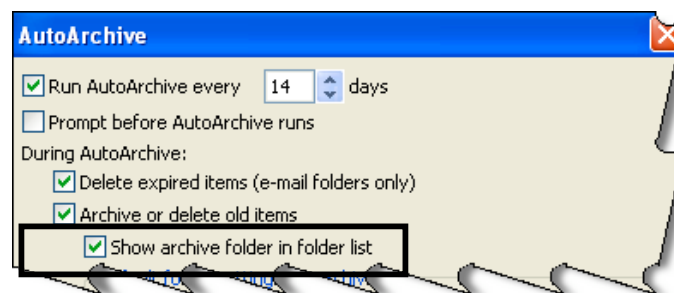
1. Click the plus + sign next to **Archive Folders** in the **Folder List**, and any subfolders to view contents.



2. It will display the contents in the same folder structure they had before being archived.



* If still you do not see your archive, make sure you have the option “Show archive folder in folder list” turned on. Go to Tools → Options → Other tab, AutoArchive. Select “Show archive folder in folder list”.



Note: You will not be able to access your archive from a web based email account, because your archive is not saved on the server. If you need to access something from home that is in your archive you, you can go to the Archive folder in outlook, click and drag it back to where you want it in your Mailbox folder.

Turn on Auto Archive

You can have Outlook automatically archive for you, and configure global AutoArchive settings.

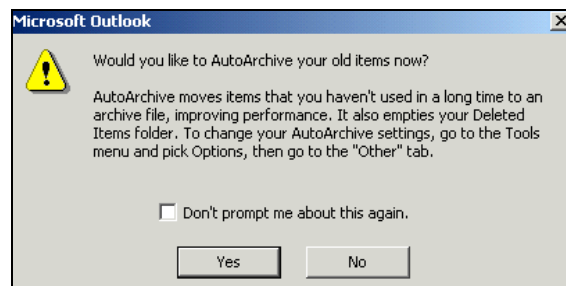
To turn on AutoArchive and configure the global archive settings do the following:

1. From the menu bar select **Tools, Options**, click the **Other** tab. Click the **AutoArchive** Button.
2. Select the Run AutoArchive every n days check box. Type or choose a number in the box for how often you want AutoArchive to run.

The screenshot shows the 'AutoArchive' dialog box with several callout boxes providing instructions:

- Top Left:** Select this to have Outlook prompt you each time it is about to perform the Auto Archive, you can click Yes or No to continue or stop the operation. (Points to the 'Prompt before AutoArchive runs' checkbox)
- Top Right:** Delete expired email items, refers to mail in which the sender turned on the expiration feature in delivery options. Any message for which an expiration date has been set will be deleted after the message has expired. (Points to the 'Delete expired items (e-mail folders only)' checkbox)
- Middle Right:** Choose an archive interval of days, weeks or months (Points to the 'Clean out items older than' dropdown menu)
- Bottom Left:** This is the default location where your archive will reside (Points to the 'Move old items to:' text box)
- Bottom Right:** Click to have all folders follow the same AutoArchive schedule. (Points to the 'Apply these settings to all folders now' button)

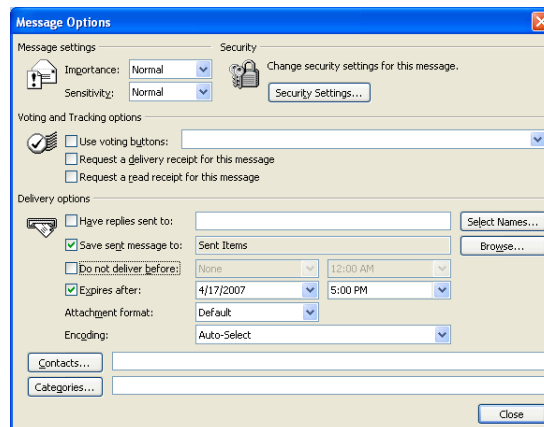
3. Click OK to save your AutoArchive settings. Click OK once more to exit the Options dialog box.
4. If you choose to be prompted before it archives you will get a dialog box as shown below.



When Auto Archive is turned it will run automatically at scheduled intervals, clearing out old and expired items. **Old items** are those that reach archiving age. Outlook will auto archive according to the default aging period for each type of item. Both the folder and all Subfolders are archived according to the default archive settings listed below.

Item	Default Archive Period Their default aging periods (the time that elapses before items are archived) are:
Inbox	6 months from date received or modified. For email messages, any action such as forwarding, replying, or moving to a different folder are <u>all modifications which will affect the date of archive</u> . Items are Auto Archived after they reach a certain age or “maturity” date. "Maturity" means how long a message sits around <u>without your touching it</u> .
Calendar	6 months from start date or last modified
Tasks	6 months from the completion date or last modified. Incomplete tasks are not archived. Tasks assigned to others are archived only if marked complete.
Notes	6 months from entry date or last modified
Journal	6 months from entry date or date modified
Drafts	6 months from date created or last modified
Sent Items	2 months from date item was sent
Deleted Items	2 months from date item was deleted
Contacts folder	N/A – is not auto archived

Expired items are e-mail whose content is no longer valid after a certain date. An expiration date is optional. You can define it at the time you create the email in the **Message Options** dialog box. When the item expires, it's unavailable and has a strike-out mark through it.



Set Archive Options for Individual Folders

You may also set archive options for individual folders. The per-folder settings override the default settings so you can Auto Archive individual folders differently. If you don't specify AutoArchive settings for a specific folder, the folder will not be archived.

1. To set the archive options for a folder, select and **right-click** on the folder.
2. Choose **Properties**. Click the **AutoArchive** tab.
3. Set the options you want for the archive of this folder and then click OK.

At the folder level, you can choose:

- * Do Not Archive items in this folder.

For example, I have my global AutoArchive settings set to archive everything every six months. However, I may have a folder for a major project that I don't want to Archive, or want different settings. In this case I would select "Do not archive items in this folder".

- * Archive Items in This Folder using the default settings.

- * Archive This Folder Using These Settings. You can specify any number of days, weeks, or months.

The screenshot shows the 'EXCEL Properties' dialog box with the 'AutoArchive' tab selected. The 'Archive this folder using these settings' option is chosen. The 'Clean out items older than' is set to 3 months. The 'Move old items to default archive folder' option is selected. The archive path is 'C:\Documents and Settings\FLANSBUS\'. Callout boxes explain the options: 'Automatically moves items marked to be archived by the specified time into a file.' points to the 'Clean out items older than' field; 'Warning! - Permanently removes items that are older than the amount of time you specify.' points to the 'Permanently delete old items' option; 'This path can be set in global AutoArchive settings.' points to the 'Default Archive Settings...' button; 'Choosing this option moves archived items to this specific archive folder.' points to the 'Browse...' button next to the archive path.

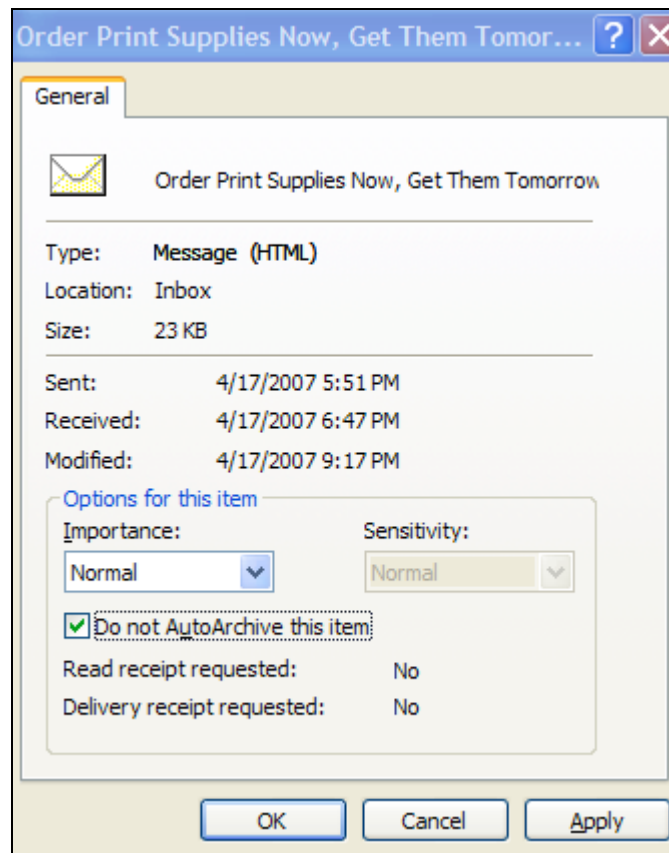
4. Click OK when done.

- * Inbox, Notes, and Drafts do not have AutoArchive activated automatically. Contacts can be manually archived, but cannot be Auto-Archived.

Exclude items from Archiving

By default, all items in a folder are archived if they meet the AutoArchive settings. However, if there are items in a folder that you want to exclude from automatic archiving, you can do so a per-item basis.

To prevent the item from being archived, open the item. Select, **File** → **Properties**. Select the check box marked do not AutoArchive this item. Click OK.



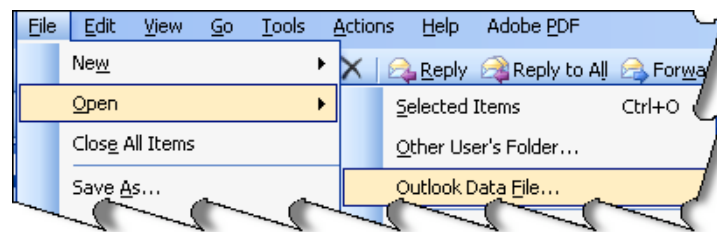
Summary

AutoArchive is just one of the many ways you can use to manage the size of your inbox. The ease of use makes AutoArchive a popular and relatively simple method for moving older Outlook items out of your mailbox on a regular basis.

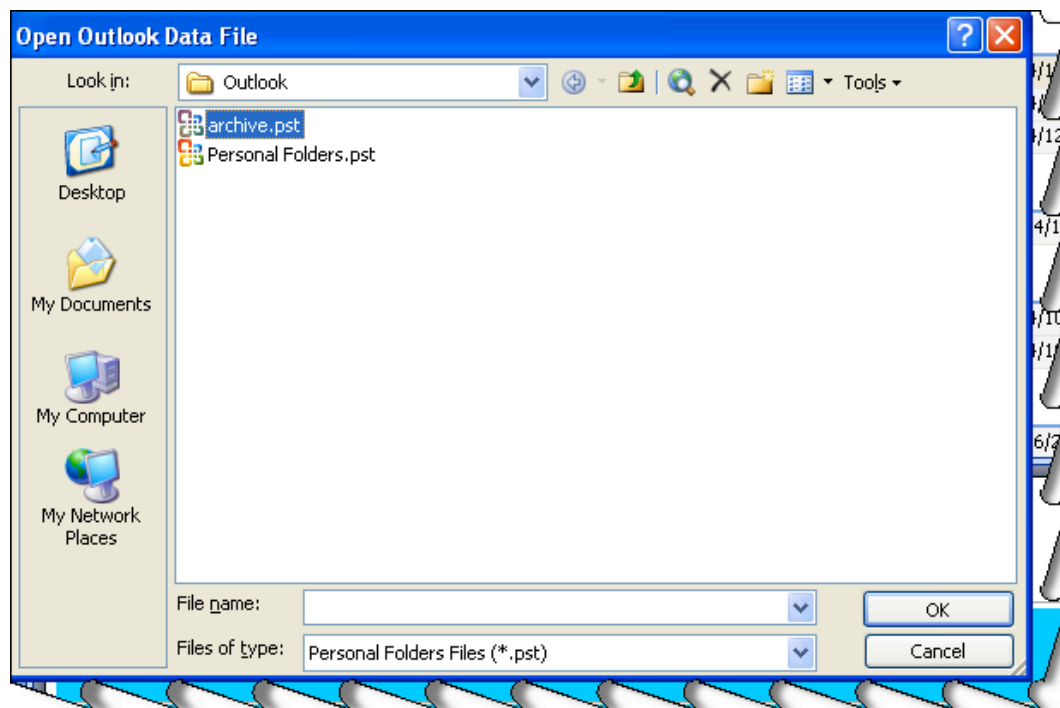
Appendix A

Opening .pst files

1. If your archive still does not appear in your folder list **or if you have more than one archive folder**, there is another method for opening .pst file stores is to open an Outlook Data File. From the menu bar select **File**→ **Open** → **Outlook Data File**.

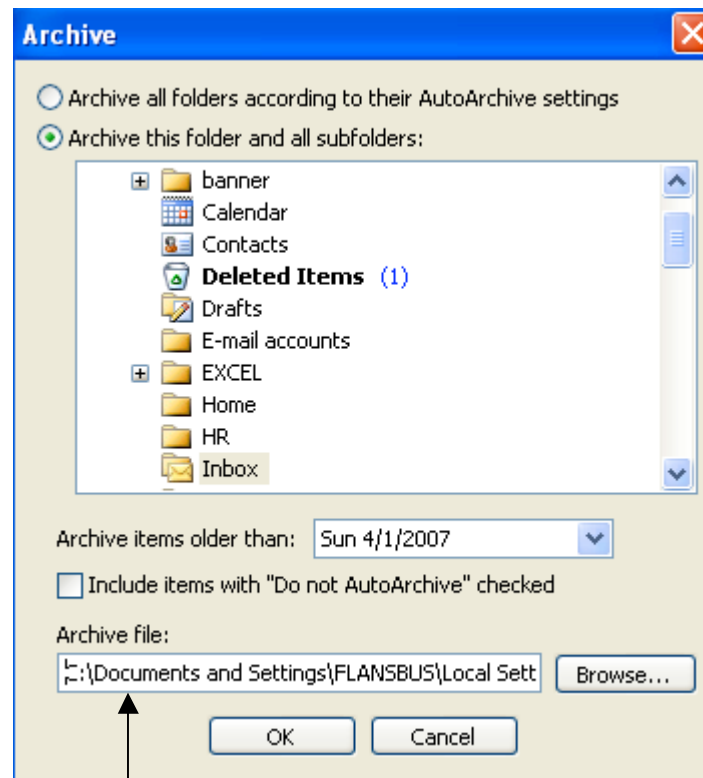


2. The “Open Outlook Data File” dialog box will open to the default location where .pst files are stored. This is usually buried in your profile in documents and settings.
 - * C:\Documents and Settings\user name\Local Settings\Application Data\Microsoft\Outlook\ C:\Documents and Settings\FLANSBUS\Local Settings\Application Data\Microsoft\Outlook\archive.pst
3. Select the archive and Click **OK** to close out of the “Open Outlook Data File” dialog box.



4. If it does not appear here then you may have saved it in you're my Documents folder which you will have to navigate to, and select the archive file named Archive.pst.

5. The archive dialog box will display where the file resides. Go to File →Archive.



6. The location is listed here.