E-mail Maintenance and Archiving in Outlook 2007
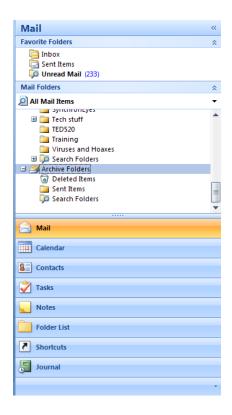
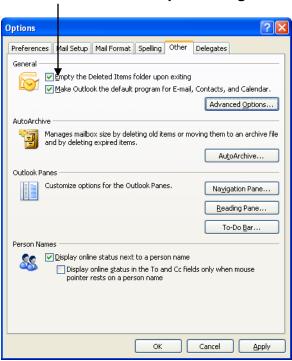# Table of Contents

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. Outlook will also run a lot faster. You are allowed a maximum of 1 GB of data or about 1024MB or 1,048,576 KB for your email. This is a lot of space for email. Nevertheless, 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 every day. Deleted items are stored on the server for up to 2 weeks and can be recovered through the web interface in case you deleted something you should not have.

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**.
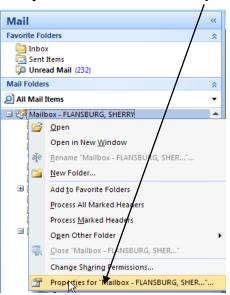

3.   You should also periodically **empty or archive your Sent items folder**.

4.   Lastly, but certainly not least, you should Archive your files frequently in order to maintain a reasonable file size in Outlook.
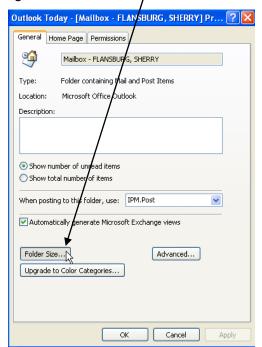
Mailbox Size Properties

The size of your mailbox directly effects performance. If Outlook runs slow, it is a sure sign that it is time to do some email maintenance and archive. Your mailbox is limited to an average of 1 gigabyte of space or 1024 megabytes or 1,048,576 kilobytes. 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.**

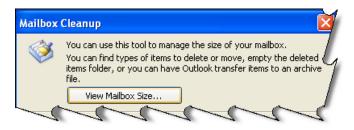2. In the Outlook Today dialog box select **Folder Size.**

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.
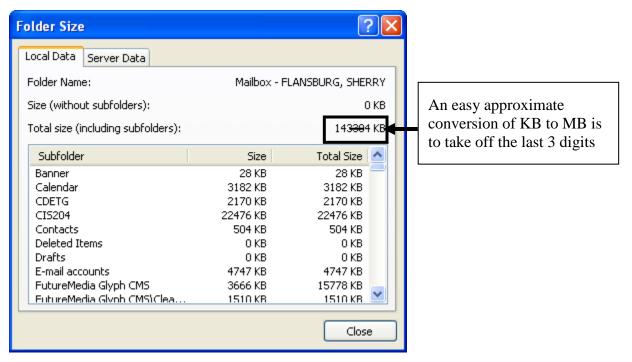
Cached Exchange Mode creates a copy of your mailbox and stores it using an offline folder (.ost) file on your computer. This copy provides quick access to your data and is frequently updated with the mail server. If you work offline, whether by choice or if there is a connection problem with the Exchange 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.

An easy approximate conversion of KB to MB is to take off the last 3 digits
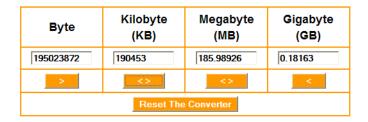
Conversion

Your folder size should be under 1 GB. If your folder size is over 1GB, or 1,048,576 kilobytes 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**.

❊   Outlook displays the size in kilobytes (KB). Just do the conversion. An easy conversion is to take off the last 3 numbers. For example, I have a total mailbox size of 90,453KB. This converts to about 90MB. A 1,000 MB = 1 GB. I am way under my limit.

❊   **1,048,576 kilobytes = 1 gigabyte**. 1,024 kilobytes equals 1 Megabyte.

But to be more precise, try the converter website listed below

- http://www.123marbella.net/en/free-bandwith-calculator.html

    1. Just type in the number of kilobytes that Outlook indicates in the total size and click the conversion [< >] button. Look at the number of Gigabytes to determine if it will fit on your USB stick.

Byte	Kilobyte (KB)	Megabyte (MB)	Gigabyte (GB)
195023872	190453	185.98926	0.18163
>	< >	< >	<
Reset The Converter			

Archive

An archive is a file containing old messages that have been moved from the mail folder. Archived messages can be retrieved by opening the archive folder. So, archiving is a method for "moving older stuff to the attic" (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 and clutter.

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. The smaller your mailbox, the faster Outlook will run.

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=RC102388191033&pid=CR10065458 1033

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

❋   <u>Default</u> settings

❋   <u>per-folder</u> settings (right click folder in navigation pane, click properties, Auto Archive tab)
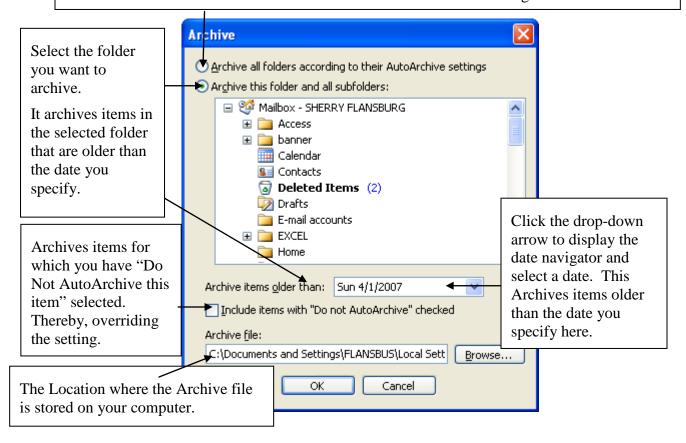
Manual Archive

Manual archive allows you to archive a particular folder using the default settings or by specifying the folder(s) and date in which to archive items.

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. Do not interrupt this process.

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.

Click the drop-down arrow to display the date navigator and select a date. This Archives items older than the date you specify here.

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

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".
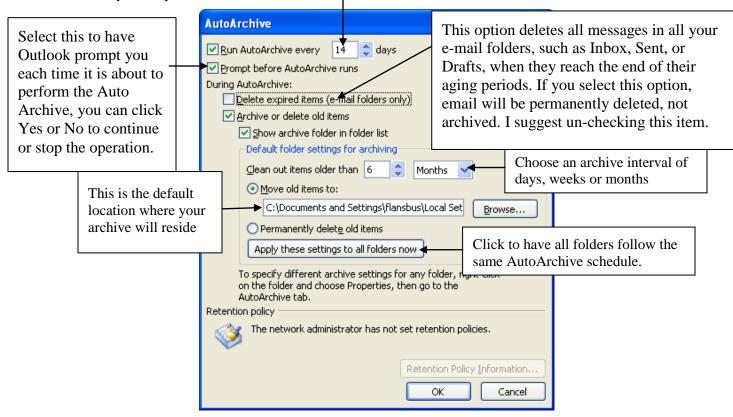

Note: You will not be able to access your archive from a web based email account, because your archive is not saved on the server. If you need to access something from home that is in your archive you can go to the Archive folder in outlook, click and drag it back to your Mailbox folder ahead of time.

Auto Archive

Instead of manually archiving your messages, you can turn on the Auto Archive feature to automatically archive on a schedule, along with other options.

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 default setting is for AutoArchive to run every 14 days.

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.

This option deletes all messages in all your e-mail folders, such as Inbox, Sent, or Drafts, when they reach the end of their aging periods. If you select this option, email will be permanently deleted, not archived. I suggest un-checking this item.

Choose an archive interval of days, weeks or months

This is the default location where your archive will reside

Click to have all folders follow the same AutoArchive schedule.

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 on, it will run automatically at scheduled intervals, clearing out old 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 Aging Periods for when items in folders expire.
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. Does not expire. However, you can manually archive them.
Junk Email folder does not get archived	

Basically when the aging period starts is the received date/time or when you last changed and saved the message, whichever is later.

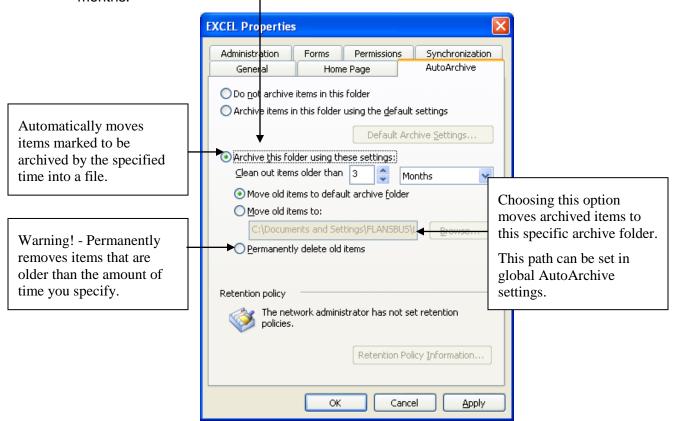http://office.microsoft.com/en-us/outlook/HA102511271033.aspx?pid=CH101130681033

Set Archive Options for Individual Folders

You may also set archive options for individual folders. The per-folder settings override the global 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.

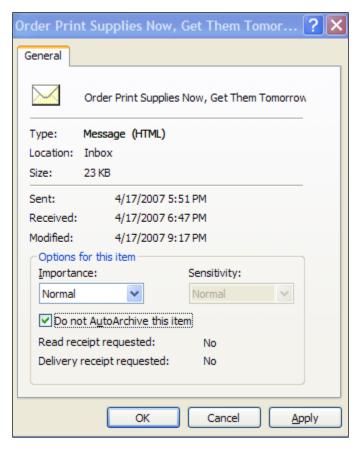✱   Archive This Folder Using These Settings. You can specify any number of days, weeks, or months.

Automatically moves items marked to be archived by the specified time into a file.

Warning! - Permanently removes items that are older than the amount of time you specify.

Choosing this option moves archived items to this specific archive folder.

This path can be set in global AutoArchive settings.

4. Click OK when done.

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

Exclude items from Archiving

If there are items in a folder that you want to exclude from automatic arching, 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 Exchange server mailbox on a regular basis.

Backup your Archive to a USB stick

Once you have archived your mailbox, it is off the mail server and now saved on your hard drive. In the unfortunate event of a hard drive failure, you would lose all your archived items. As with all your files and folders it is good to back things up. In Outlook you Export to do this.
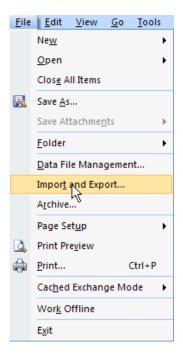
You **Export** the archive as a (.pst) personal folder file. This file can only be opened in Outlook.
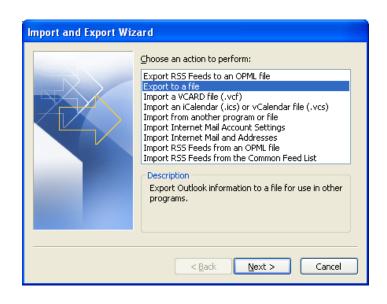
First you have to **make sure that your USB drive is large enough to store your archive file**. To do this, check the size of your archive file to make sure it will fit on the USB stick. **Right-click on your Archive folder**. Select **Properties for Archive Folders.** Click on **Folder Size.** Refer to the conversion information on page 4 if you need to.

Export

Export is used to create a file containing your Outlook information, while maintaining the original data in your folders. Export can be used to create a backup of your archive or you can Export specific items such as contacts.
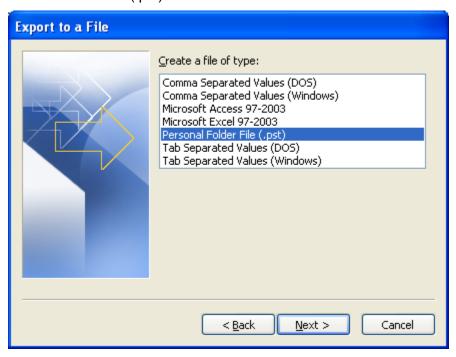
1. Go to **File → Import and Export**.

2. In the Import and Export Wizard, choose **Export to a file**.
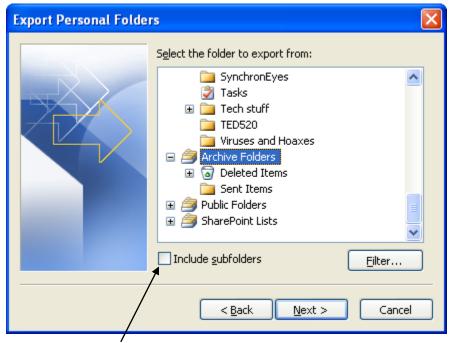

3. Click **Next**.

4. Choose Personal Folder File (.pst)
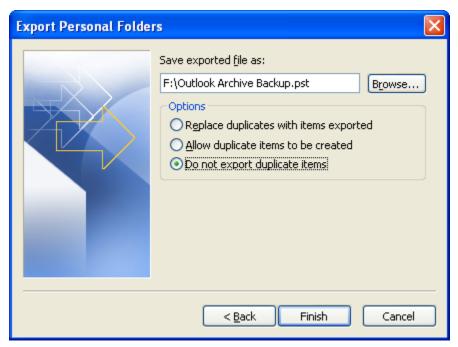

5. Select the folder you want to export. For example, I want to export my Archive. Scroll down and click on **Archive folders**.
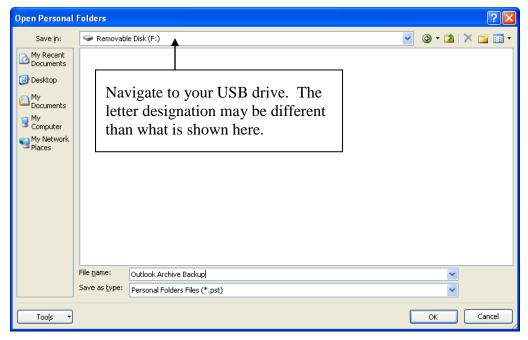

6. IMPORTANT: Click **Include subfolders**. Click **Next**.

7. In the Export personal folders dialog box you want to give it a meaningful name.

8. Click Browse to go to your USB drive so it saves it there. Choose **Do No export duplicate items**. Existing data will be kept, and the duplicate information in the file will not be copied to the current Outlook folder.

9. Browse to your USB drive and if you haven't already done so, type in a meaningful name such as Outlook Archive Backup or contacts depending on your purpose.
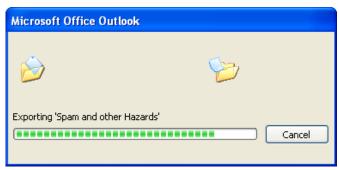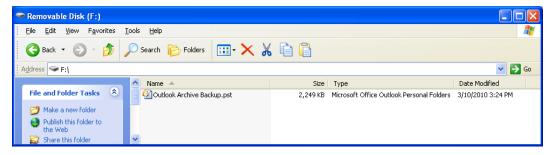

10. Click **OK**. Click **Finish**.

11. In the Create Microsoft personal folders dialog box, **type in the name** of the Personal folder. Click **OK**.

12. Name the file and click OK.

13. Click Finish.

14. It will export your data in a .pst file format that can only be opened in Outlook. This may take awhile depending on the size of your archive.
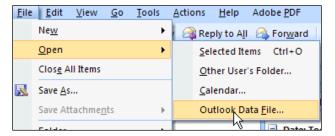

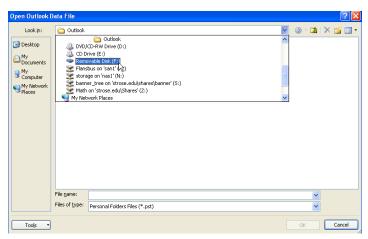15. Check your Flash Drive to check that the archive backup is there. You are done!
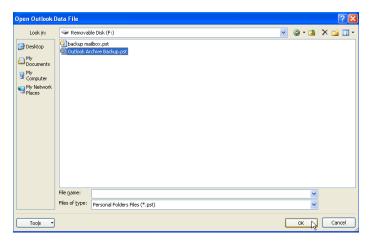
Opening .pst files

1.   If you ever have to restore your backup of your archive, it is a .pst file that can only be read in Outlook. Therefore you will have to open your backup from Outlook.

2.   Follow these instructions to open a .pst file in Outlook. From the menu bar select **File→ Open → Outlook Data File**.

3.   The "Open Outlook Data File" dialog box will open to the default location where .pst files are usually stored. This is usually buried in your profile in documents and settings.

4.   You need to **navigate to the USB drive** where your backup resides. In this example it is the F Drive.
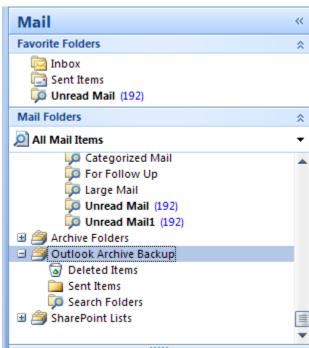

5.   Select the .pst document. Click **OK** to close out of the "Open Outlook Data File" dialog box.
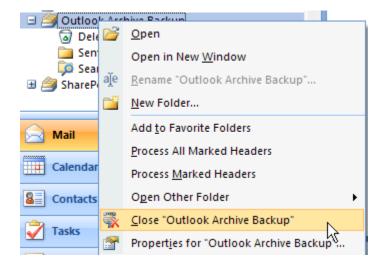
6.   The pst file will display near the bottom of the folder list in the navigation pane, usually after archive folders. You can open your folders and view your items here.

7.   ⊞ 📁 Outlook Archive Backup

8.   When you are done viewing your file, right click and choose **Close**.

Resources: http://office.microsoft.com/en-us/outlook/HA101057061033.aspx