

# Outlook: Storing Email

Academic Computing Services

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**Abstract:** Use AutoArchive to move items to an archive file (.pst). Archiving copies items to the archive file and then removes them from the current folder. AutoArchive allows you to set up a schedule and archive multiple folders at the same time at set intervals. You can also create a new data file (.pst) and drag items to it. These folders are referred to as Personal Folders.

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## Introduction

Your Outlook mailbox grows as you create and receive items. Items include email messages, appointments, contacts, tasks, notes, and documents. To keep your mailbox manageable, you need another place to store – archive – the old items that are important but not frequently used. You also need a way to automatically move those old items to the archive location and to discard items whose content has expired and is no longer valid. AutoArchive takes care of these processes for you.

AutoArchive is on by default and runs automatically at scheduled intervals, clearing out old and expired items from folders. Old items are those that reach the archiving age you specify, and may include such things as the original email you received with the goals for a project you are assigned to. Expired items are mail and meeting items whose content is no longer valid after a certain date, such as a meeting you had four months ago that still appears on your calendar. When the item expires, it is unavailable and has a strike-out mark through it.

Learn to create and manage folders in your mailbox on the Exchange server, in Personal Folders saved on your computer's hard disk or to a local network server, or in Public Folders. You can use personal folders as an archive for older messages that you want to keep but do not need to access frequently.

## Objectives

In this workshop, participants will learn some of the advanced features of using Outlook. Upon completion of this workshop the participants should be able to:

- Use the AutoArchive feature to move “old” messages
- View archived items.
- Setting up a schedule and archive multiple folders at the same time at set intervals.
- Create a new data file (.pst) called Personal Folders.
- Move, store, and view items in a .pst file.
- Explore the difference between copying items or moving items.

Although this handout is prepared with Outlook 2002, those using the Outlook 2000 client should be able to do almost all of the features listed. If you are interested in downloading the Outlook 2000 (for Windows) client, visit [www.ku.edu/exchange/outlook](http://www.ku.edu/exchange/outlook).

## Prerequisites

You must have a KU Exchange account. It is assumed that the participants in this workshop have either taken the *Outlook: Email Basics* workshop or have equivalent skills.

## Related Training Available from ACS

All workshops offered by Academic Computing Services (ACS), a division of Information Services, are free to KU students, staff, faculty, and [approved affiliates](#).

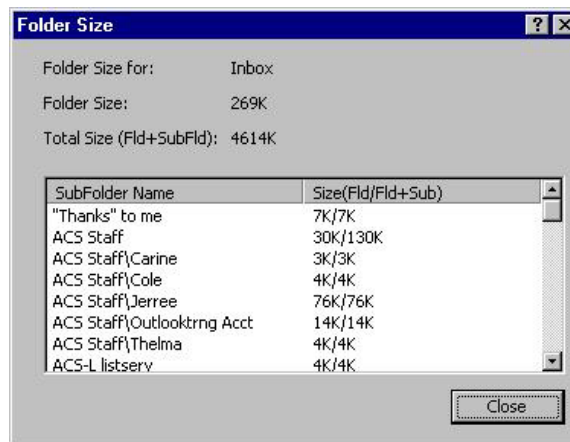
To learn more about or register for workshops, receive automatic announcements of upcoming workshops, and track workshops you've registered for and have attended, visit the ACS Web site at [www.ku.edu/acs/train](http://www.ku.edu/acs/train). You can also check our online schedule at [www.ku.edu/acs/schedule](http://www.ku.edu/acs/schedule) for a list of class offerings and their availability. For further workshop related questions, please email [training@ku.edu](mailto:training@ku.edu).

## Definitions

Term	Definition
Information viewer	The section of an Outlook window displaying a specific type of item. Each folder has an Information viewer that displays information regarding that folder.
Item	Any piece of information created in Outlook, such as an email message, a contact, or an appointment.
AutoArchive	A folder containing Outlook items that are no longer current. Outlook can be set to automatically archive calendar or email items after a predetermined time (e.g. 60 days). When Outlook archives items, it moves those items from current folders on the server to an archive folder on your computer. You can retrieve these items later by opening the archive file stored on your computer or file server.
Personal folders (.pst)	A folder that you create for your personal use. Personal folders are stored on your computer's hard drive or a local file server rather than on the Exchange server.

## Check the Storage Limits on Your Account

1. Right-click the **Outlook Today (Mailbox, yourname)** icon to display the folder's submenu and then select **Properties**. The Properties dialog box appears
2. Click **Folder Size...** to view the size of the folder.



*Folder Size dialog box*

3. Click **OK** to exit the Properties dialog box.

## How AutoArchive Works

AutoArchiving is the process that Outlook uses to copy or delete items from your folders periodically. There are two sets of AutoArchive settings: global settings and per-folder settings. The global settings, called default settings, determine whether AutoArchive runs at all and what it does by default with the items in any Outlook folder (except the Contacts folder, which is not affected by AutoArchive). The per-folder settings override the default settings so you can AutoArchive individual folders differently. If you don't specify AutoArchive settings for a specific folder, the folder automatically uses the default settings.

## Set AutoArchiving Globally

AutoArchive is turned on by default. However, you have control over the entire AutoArchiving process which means that you can turn AutoArchiving off completely if you don't want it.

1. With any Information viewer open, click the **Tools** menu and select **Options....** The Options dialog box appears.
2. Click the **Other** tab.
3. Click **AutoArchive....** The AutoArchive dialog box appears.
4. By default the **Run AutoArchive every ? days** field is checked. This means that AutoArchiving is turned on. Uncheck the box only if you don't want to use AutoArchive. You can change the number of days that pass before AutoArchiving occurs.
5. If you want Outlook to let you know before it starts AutoArchiving, leave the **Prompt before AutoArchive runs** field checked.
6. By default, Outlook deletes (rather than archives) expired email items. Uncheck the *Delete expired items when AutoArchiving (email folders only)* field if you prefer to archive these items.

7. By default, the *Archive or delete old items* is checked. This checkbox allows you to set options for archiving or deleting old items.
  8. The *Show archive folder in folder list* field is checked to indicate that the archived folder will be displayed in the folder list. Uncheck only if you don't want the archived folder to be listed in the folder list.
  9. The **Default folder settings for archiving** field suggests where Outlook will save the archived items. You can type a different file path or you can click **Browse...** to select a different folder.
  10. To apply the changes to all folders that currently use the default settings, click **Apply these settings to all folders now**. This will not override custom archive settings that you have specified on individual folders.
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**Note:** If you change the archive file listed under Move old items to, it is changed for all folders that use the default AutoArchive settings.

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When you open Outlook, it checks to see if it should AutoArchive items. If you leave your computer on with Outlook running all the time, Outlook never checks to see if AutoArchive is due. If you do leave your computer on all the time, you could close Outlook each evening and open it again each morning in order for Outlook to check whether AutoArchive is due.

## Set AutoArchiving Per-Folder

Outlook considers items that are older than a certain time frame for AutoArchive. The time frame is set on each individual folder. You can specify in each folder when an item expires and the interval that Outlook performs AutoArchiving.

Each folder has a default expiration period for the items contained in that folder.

<i>Folder</i>	<i>Period</i>	<i>Basis for Archiving</i>
Calendar	6 months	Item start date or date of last item modification. Recurring items are not AutoArchived.
Contacts	None	Not archived.
Deleted Items	2 months	Date item moved into folder.
Drafts	6 months	Date item created or last modified.
Inbox	6 months	Date message received or last modified, whichever is later.
Journal	6 months	Entry date or date of last modification.
Notes	6 months	Entry date or date of last modification.
Outbox	3 months	Creation date or date of last modification.

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Sent Items	2 months	Date item was sent.
Tasks	6 months	Completion date or date of last modification. Uncompleted tasks are not archived. Tasks assigned to others are archived only if marked completed.

To turn AutoArchiving on or off for an individual folder:

1. In the Folder List, right-click the icon for the folder you want to change the AutoArchiving default setting.
2. Click **Properties**. The Properties dialog box appears.
3. Click the **AutoArchive** tab.
4. Specify whether you want to archive this folder and if so, whether to use the default AutoArchive settings or your own settings. If you use your own settings, you can do any of the following:
  - In the *Clean out item older than* field check boxes, you can change how often Outlook AutoArchives items by typing in a different number in the box at the right of the field. Open the adjacent drop-down list and select Months, Weeks, or Days.
  - AutoArchived items from your folders can be placed into an archive file. Items are added to items already in the archive folder. To archive to a file other than the default one, specify a different file name in the **Move old items to** box or click **Browse** to select a different folder. The next time AutoArchive runs on this folder, Outlook will automatically create the new archive file for items in this folder.
  - If you select the **Permanently delete old items** field, items are not moved to the Deleted Items folder. They are permanently deleted.
5. Click **OK**.

## Excluding Individual Items from AutoArchiving

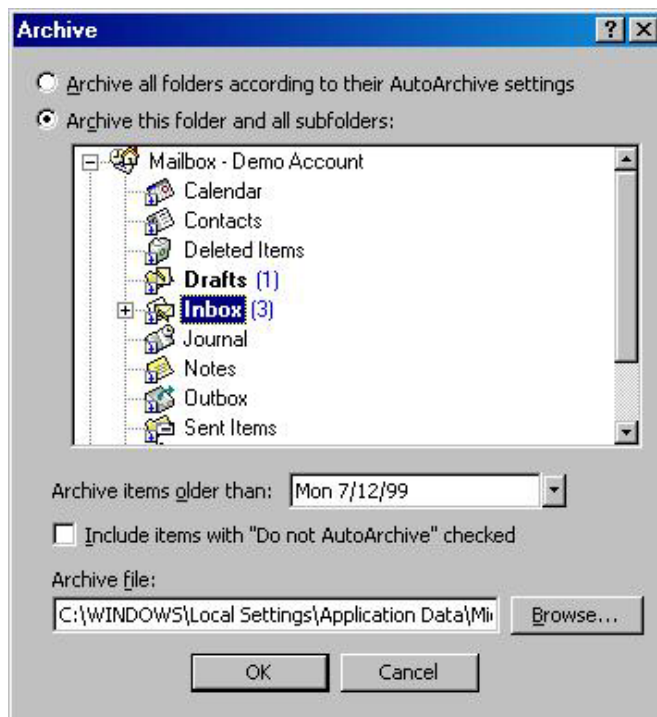
By default, the AutoArchiving properties defined for each folder apply to all items in that folder. You can mark specific items to be excluded from AutoArchiving.

1. Open any Information viewer.
2. Double-click the item you want to exclude from AutoArchiving. The item appears in its original form.
3. Click the **File** menu and select **Properties**. That item's Properties dialog box appears.
4. Check the **Do not AutoArchive this item** field.
5. Click **OK**. The item will be excluded from AutoArchiving.

## Archiving Items Manually

If you have AutoArchiving turned off or want to archive items before AutoArchive is due, you can manually archive items. Since AutoArchiving never archives Contact items, you can manually archive these items.

1. With any Information viewer open, click on the **File** menu and select **Archive....**  
The Archive dialog box appears.



2. If you want the archive to only affect the selected folder, leave the **Archive this folder and all its subfolders** field selected. You can select a different folder for the archive to affect.

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**Note:** By leaving this option selected, you control which folders are archived, the age of the items in those folders that are archived, and the file into which the archived items are moved. If you chose a file that doesn't already exist, Outlook creates that file. Each time you manually archive, Outlook adds items to the items already in the archive file.

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3. Select the *Archive all folders according to their AutoArchive settings* field only if you want the manual archive to affect all the folders.

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**Note:** If you select this option, Outlook does exactly the same as it does when AutoArchiving occurs. It AutoArchives now, rather than waiting for the appointed AutoArchive time. This option moves items into the file that AutoArchiving uses, adding items to those already in the file or, deletes items if specified.

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4. If you selected *Archive this folder and all its subfolders* field, then you can click the *Archive items older than:* drop-down calendar, or type in a date, to select the age of the items you want to archive.
5. Leave the **Include items with “Do not AutoArchive” checked** field unchecked unless you want the manual archive to look for these items.
6. The **Archive file:** field suggests where Outlook will save the archived items. You can type a different file path or you can click **Browse...** to select a different folder.
7. Click **OK**.

## Viewing Your Archived Folders

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**Tip:** If you are not sure of the name of your archive file, you can find it by clicking on the **Tools** menu, click **Options**, click the **Other** tab, and then click **AutoArchive**. The archive file name appears in the *Default archive file* box. Once you know the name of your archive file, you can retrieve archived items.

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1. Click on the **File** menu, point to **Open**, and then click **Outlook Data File...** The Open Outlook Data File dialog box appears.
2. Locate the archive file and select it. Click **OK**.
3. The .pst file is added to your Folder List with the name **Archive Folder**.

When you open Archive Folders, you will see that Outlook maintains your existing folder structure. If there is a parent folder above the folder you chose to archive, the parent folder is created in the archive file, but items within the parent folder are not archived. In this way, 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. If you decide you want archived items moved back into your main mailbox, you can import all the items from the archive file into their original folders or into other folders you specify, or you can manually move or copy individual items by dragging and dropping.

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**Note:** When you archive items in a Calendar folder, recurring items are not archived if any occurrences are scheduled after the archive date. Old occurrences of a recurring item in a Calendar folder are needed to keep track of future occurrences.

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## Personal Folder Files

A Personal Folders file is a file that contains folders, messages, and files. Personal Folders files will be listed in the Folder List. Personal Folders files are saved with the extension .pst. Personal folders reside on your computer, not the Exchange server. If you use another computer, you will not be able to see items stored in personal folders. You can use personal folders as a place to store items you want to keep, but that you don't need to access from multiple locations. Items in your personal folders do not count against your storage space limit (80MB) on the Exchange server.

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Outlook does not limit you to having only one Personal Folders file. You can create any number of personal folders files to store related items on your hard drive or to back up or archive folders. A personal folders file appears in the Folder List with the default name "Personal Folders". You can work with a personal folders file as you would with any other file. You can save, copy, and move it to another location on your hard drive or local file server.

## Creating Personal Folder Files

To create a Personal Folder File:

1. From within any Information viewer, click the **File** menu, point onto **New**, and then select **Outlook Data File...**. The New Outlook Data File dialog box appears with Personal Folders File (.pst) as a storage type.
2. Click **OK**. The Create or Open Data File dialog box appears.
3. In the *File name:* field, type a name for the file, or leave the default. The name given here is the name that appears in Windows Explorer. Do not type a file name extension; Outlook automatically uses *.pst*.

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**Tip:** You can create a new Personal Folders file in any folder, but it makes sense to create the new Personal Folders file in the same folder as an existing Personal Folders file.

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4. Click **OK**. The Create Microsoft Personal Folders dialog box appears.



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**Note:** Each Personal Folders file has two names. One name is the file name you see in Windows Explorer. The other is the name you see in the Outlook Folder List. If you create more than one personal folders file, you may want to denote the difference with the file name (e.g. Personal Folders – ProjectX).

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5. In the *Name:* field, type in a name that identifies the purpose of the new Personal Folders file. This is the name that appears in your Outlook Folder List. It is recommended that this name be the same as the file name you typed in the previous dialog box.
6. Under the *Encryption Setting* section, accept the default of compressible encryption.
7. If you want to password-protect the new file, type a password in the *Password:* field, and then again in the *Verify Password:* field.

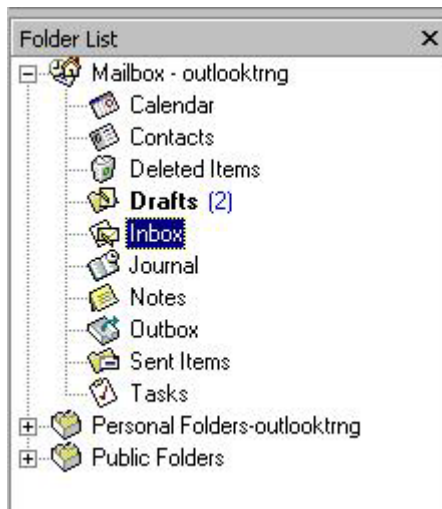
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**Caution:** Be careful when protecting the file with a Password. In this case, there will be no way to access your personal folders file if you forget the password. The file will be permanently locked inside your computer.

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8. Leave the *Save this password in your password list* field unchecked.
9. Click **OK**.

The new Personal Folders file appears in the Folder List. By default, the only folder contained in the file currently is a Deleted Items folder.



*The Folder list in Outlook*

## ***Removing a Personal Folders File From the Folder List***

If you no longer need a certain Personal Folders file, you can remove it from Outlook so that it no longer appears in the Folder List.

1. Right-click the Personal Folders file in the Folder List.
2. From the submenu, select **Close “Personal Folders....”**. There is no warning message, it simply disappears from the Folder List.

After you have removed a Personal Folders file, that file still exists on your hard drive, it is just not available to Outlook. The file can be deleted from your hard drive or your local server if you no longer need it.

## ***Re-Adding an Existing Personal Folders File to the Folder List***

After a Personal Folders file has been removed from the Folder List, it can be re-added to the Folder List again.

1. From within any Information viewer, click the **File** menu, point onto **Open**, and then select **Outlook Data File....** The Open Outlook Data File dialog box appears.
2. Locate and select the name of the Personal Folders file you want to add back to the Folder List.

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**Note:** The default folder location for Win 95/98 is C:\Windows\Local Settings\Application Data\Microsoft\Outlook. For Win 2000/XP is C:\Document and Settings\username\Local Settings\Application Data\Microsoft\Outlook.

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3. Click **OK**. The Personal Folders file appears on the Folder List.

## Compacting Your Personal Folders File

When items are deleted permanently from the Deleted Items folder, under your Personal Folders file, Outlook does not always release the space those items previously occupied. To get the space back, you need to compact your Personal Folder file from time to time.

1. Be sure the Folder List is displayed (**View** menu, **Folder List**).
2. Right-click the name of your Personal Folders file, not the name of an individual folder within that file. A submenu appears.
3. Click **Properties**. The Personal Folders Properties dialog box appears.
4. Click **Advanced....**
5. Click **Compact Now** to recover unused space within your Personal Folders file.

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**Note:** Compacting a file once doesn't necessarily make the file as small as possible. You may have to compact it two or three times.

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## Deleted Items Folder

The Deleted Items folder stores all deleted items from the Inbox, Calendar, Contacts, Tasks, Notes, Outbox, Sent Items, and other mailbox folders you have created. You can delete items you no longer need from any folder. Deleting items is a two-step process: moving the items to the Deleted Items folder and emptying the Deleted Items folder.

Items are permanently deleted when:

- You empty the Deleted Items folder.
- You manually delete them individually from within the Deleted Items folder.

After either of these steps has been taken, the item(s) cannot be restored.


## Moving Items to the Deleted Items Folder

1. Open the folder containing the item(s) that you want to delete.
2. Select the item(s) to be deleted.

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**Tip:** To select more than one item hold down the **[CTRL]** key as you click the next item.

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3. Click **Delete**  or press the **[Delete]** key. When you delete an item from a folder, the item is moved to the Deleted Items folder.

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**Alternatively:** You can delete an item by dragging it to the Deleted Items folder.

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At this point the item is only marked for deletion. If you close and reopen Outlook, you will see that these items have not yet been deleted and are still in the Deleted Items

folder. This provides the added feature of being able to restore an item that you decided you want.

## ***Undeleting Items***

You can undelete items from the Deleted Items folder before it is emptied.

1. Open the Deleted Items folder.
2. Right-click the item you want to undelete.
3. From the submenu, select **Move To Folder**.
4. Select the folder into which to move the deleted file.
5. Click **OK**. The item is moved out of the Deleted Items folder and placed in the folder you selected.

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**Alternatively:** You can also retrieve a deleted item by dragging it from the Deleted Items folder to another folder.

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## ***Emptying the Deleted Items Folder***

1. To permanently delete all the items from the Deleted Items folder, right-click the Deleted Items icon on the Outlook Shortcuts Bar.
2. From the submenu, select **Empty “Deleted Items”** folder.
3. A message appears asking you to confirm deletion of all the items in the Deleted items folder. Click **Yes** if you want to permanently delete all items. Click **No** to cancel the process.

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**Alternatively:** You can also permanently delete all the items from the Deleted Items folder by click the **Tools** menu and selecting **Empty “Deleted Items” Folder**.

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## **Default Location of Archive and Data Files**

Outlook creates the archive files and the personal folder files automatically in one of the following locations depending on the operating system you are using.

Windows 2000/XP – C:\Documents and Settings\*yourusername*\Local Setting\Application Data\Microsoft\Outlook\Archive.pst

Windows NT – C:\winnt\profiles\*yourusername*\Local Settings\Application Data\Microsoft\Outlook\Archive.pst

Windows 98 – C:\Windows\Local Settings\Application Data\Microsoft\Outlook\Archive.pst

## For More Information

Here are some additional sources of information about Outlook and Exchange:

***KU's Exchange & Outlook Support – 864-0200***

***Exchange Email Help – [exchange@ku.edu](mailto:exchange@ku.edu)***

Email your questions, problems or concerns to the Exchange team.

***Website FAQs – [www.ku.edu/exchange/faqs.shtml](http://www.ku.edu/exchange/faqs.shtml)***

Questions and information related to KU's Exchange project and using the Outlook client can be located at this Web site.

### ***Other Help Options -***

Like other Microsoft Office applications, Outlook has a Help menu and an Office Assistant that can be used to get online help. Selecting Help from the Help menu allows you to use the Office Assistant or the Outlook Help file to find the information you need. You can also use the What's This feature to find out about a part of the Outlook window or what a button or box does. All of the following features can be located under the Help menu on the toolbar.

*Using the Office Assistant* -- When you first start Outlook, the Office Assistant appears on your screen. You can choose any of the items listed in the Office Assistant balloon. You can also type a question and click Search. The Office Assistant provides a list of relevant topics. If you select a topic, the Office Assistant opens a window that provides detailed information about that topic. The Office Assistant can be hidden or closed.

*Using the on-line help* -- The Help window has two panes. The left pane allows you to select topics and the right pane shows information about the select topics. There are three tabs: Contents, Answer Wizard, and Index. The Contents tab allows you to select general areas of information, the Answer Wizard tab allows you to ask a question in your own words, and the Index tab provides an alphabetical list of major help topics.

*What's This?* -- When you select this option from the Help menu, a question mark is added to the pointer. Using this question mark pointer, you can point onto any menu item and click to get information about that item, or point onto any region of an Information viewer or form and click to get information about that region.

*Office on the Web* -- Outlook opens Internet Explorer and opens a Web site with information about Office 2000 applications.

*Detect and Repair* -- Activates a utility that examines your Office installation and automatically corrects errors.

## Getting Additional Help

Academic Computing Services provides consulting and Q&A help in a variety of ways:

785/864-0200

[question@ku.edu](mailto:question@ku.edu)

[www.ku.edu/acs/help](http://www.ku.edu/acs/help)

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