

## Auto Archiving Folders in Outlook XP

Your Outlook email account on the Exchange server is allotted 50 megabytes of storage space on the server. Items in the **Inbox**, **Calendar**, **Sent Items**, **Deleted Items**, and other folders impact the amount of space your email account utilizes on the server. Emails with file attachments consume more space, depending on the size of the attached file. Proper care of managing space utilization on the Exchange server should be taken by all Outlook users to keep individual email service from being interrupted.

Over time the **Inbox** and other folders will accumulate many items. Unwanted items can be deleted to conserve space on the server. Remember the **Deleted Items** folder must also be emptied regularly. It's also recommended that items no longer needed in the **Sent Items** folder be deleted as well.

However, other items in the **Inbox**, **Sent Items**, **Calendar**, and other folders may need to be kept for future reference. To keep your **Inbox** and other folders manageable and to conserve storage space on the Exchange server, you need another place to store (archive) the old important items that may not be frequently used. Further, you need a way to automatically move those old items to the archive location and to discard outdated items. The **Auto Archive** feature in Outlook takes care of these processes for you.

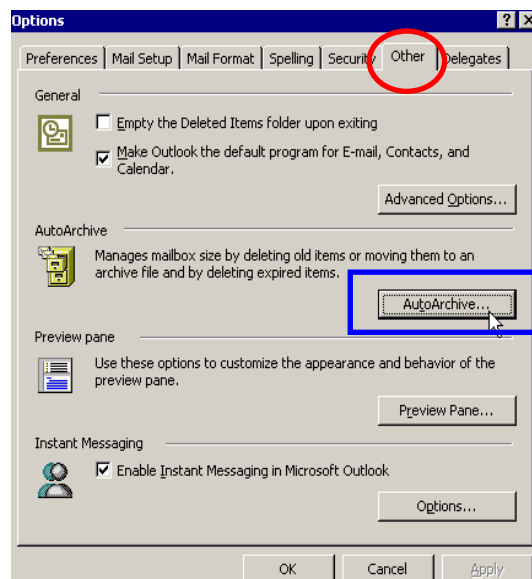
**Auto Archive** enables you to automatically transfer old items from the **Inbox** or other folders to a storage file on the hard drive of the computer being used. Archived items will only be accessible from that computer. **Old items** are those that reach the archiving age you specify. **Expired items** are mail and meeting items whose content is no longer valid after reaching a certain date, like an appointment six months ago that still appears on your calendar. With **Auto Archive** you can permanently delete expired items, and delete or archive old items to an archive file.

**Auto Archive** is a two step process. First **Auto Archive** must be turned on. The second step is to set the **Auto Archive** properties for each folder that you want archived. Those running Office 2003 will have the ability to setup default archive settings, but may need to “turn on” archiving on each folder.

These directions assume you are logged into your Exchange email account using the Microsoft Outlook XP program on your office computer. The **Auto Archive** feature is also available in Outlook 2000 and 2003.

To turn on **Auto Archive**:

1. From the menu bar, select **Tools, Options**;
2. Click on the **Other** tab;
3. Click on the **Auto Archive** button;

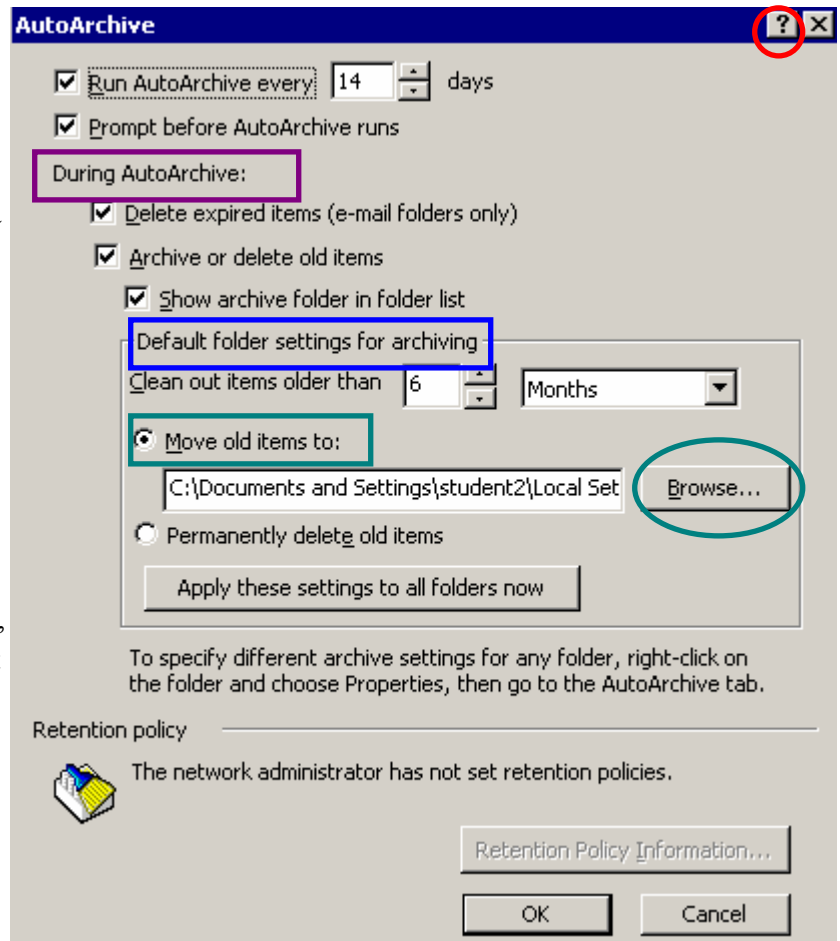


4. The **Auto Archive** dialogue box opens;

5. To set **Auto Archive** to turn on when you start Outlook, click in the box beside “**Run Auto Archive every**”;
6. To specify how often the **Auto Archive** process will run, enter a number in the box beside “**days**”;
7. To be notified before the items are archived, click in the box beside “**Prompt before Auto Archive runs**”;
8. In the “**During Auto Archive**” area, select the options you prefer.

For an explanation of any option, click the **? box** in the upper right hand corner of the screen and then click on the item to be explained.

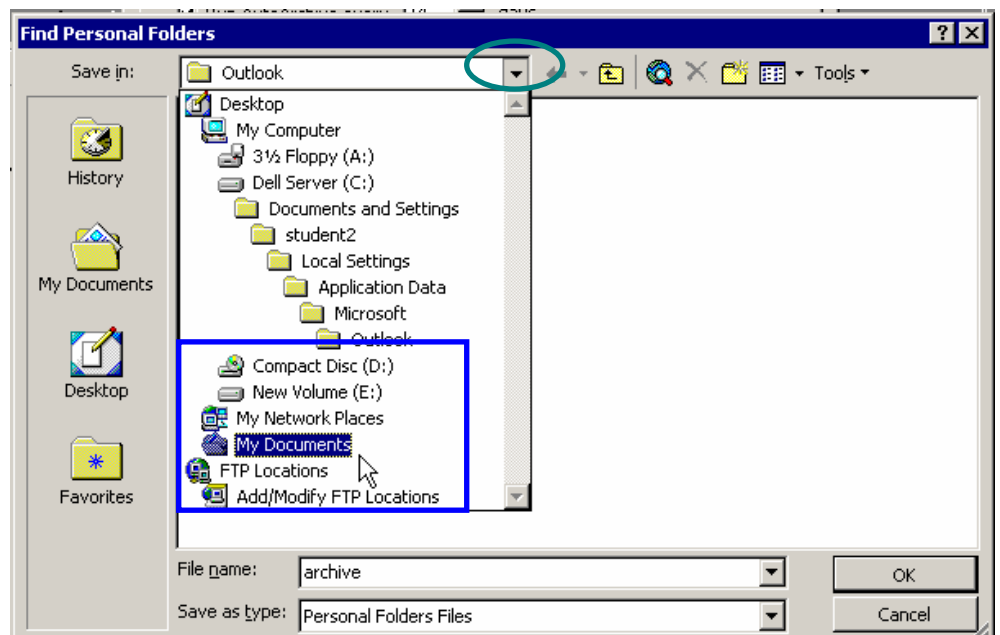
It is recommend to select “**Show archive folder in folder list**” in order to see the archived folders in the **Folder List** view.



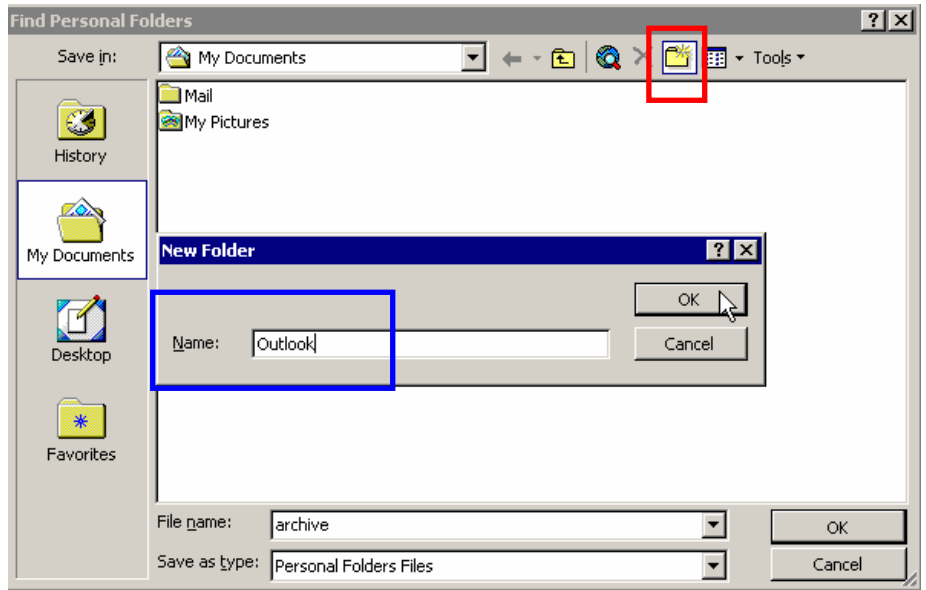
9. In the “**Default folder settings for archiving**” area, set the time frame for old items to be cleaned out.

10. In the “**Move old items to**” area, specify the location where the archive file will be stored. It is recommended to click the **Browse** button, and click the drop-down arrow beside the “**Save in:**” field to locate the **My Documents** folder;

11. Click on **My Documents** to select it.

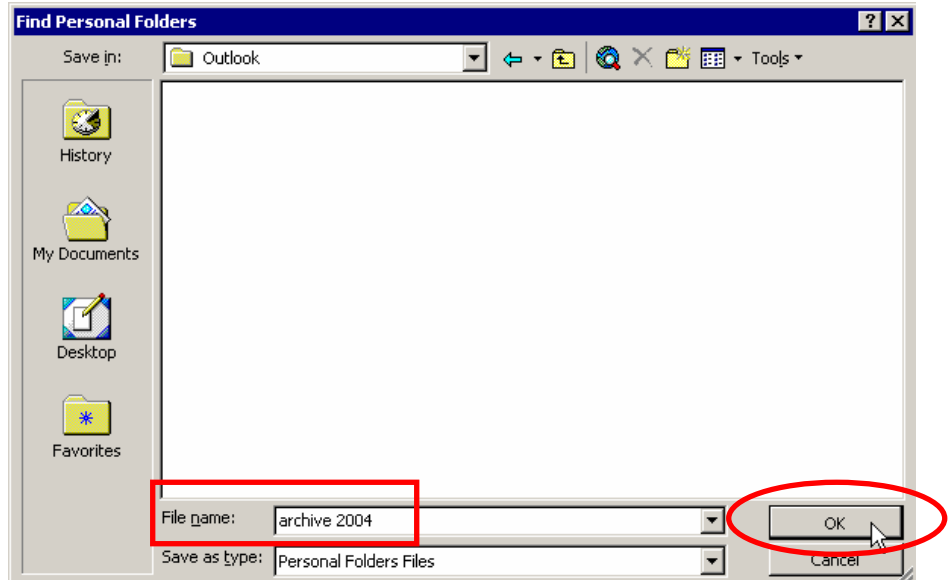


12. It is further recommended to create a new folder named **Outlook** under the **My Documents** folder. This will make it easier to locate the archived file in the future. Click on the **Create new folder** icon;
13. The **New Folder** dialogue box opens; in the “**Name**” field type **Outlook** and click **OK**.



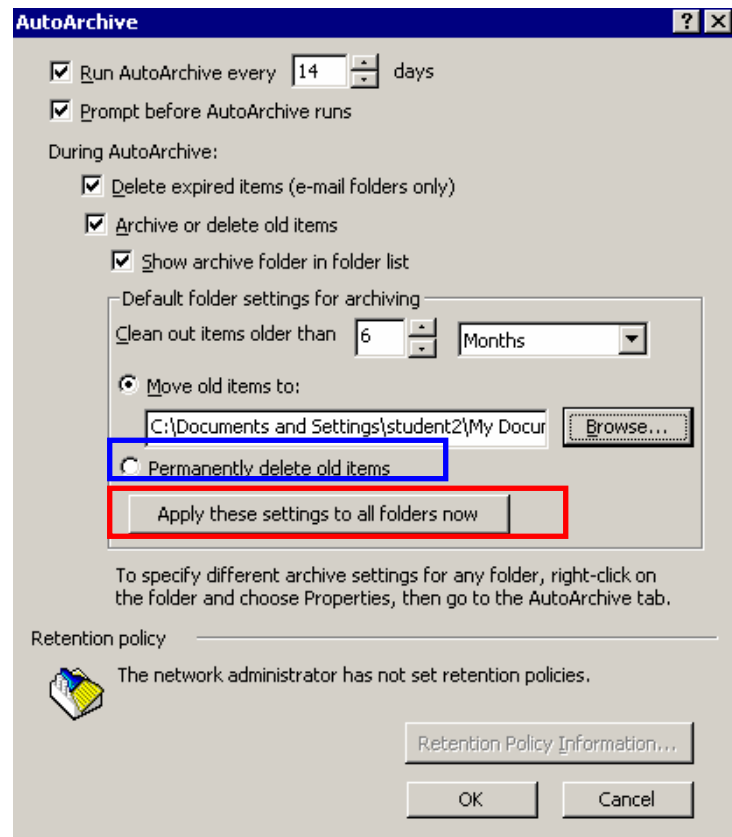
14. The **File name** by default will be **archive**. You may name the file as you prefer; in this case the file name is **archive 2004**; click **OK**.

**Note:** The file is saved as a Personal Folders File type also known as a “.pst” file.



**Note:** It is recommended not to select “**Permanently delete old items**”.

15. If you want to apply these settings to all folders, click on the “**Apply these settings to all folders now**” button and then click **OK**.
16. *Or*, if you prefer to apply settings to specific folders only, click **OK**.
17. Click **OK** on the Options dialogue box when it appears.



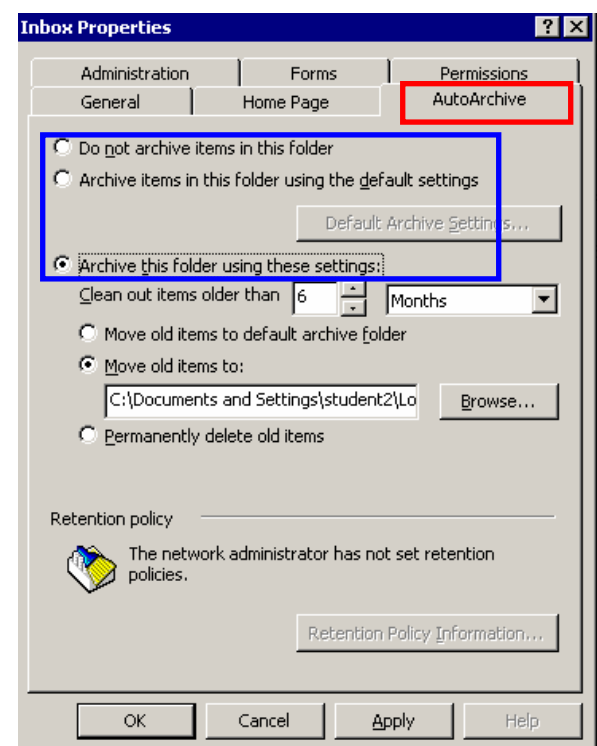
To set **Auto Archive** for specific folders only:

1. From the Outlook shortcut bar or the Folder List, single **right click** on the folder to be archived.
2. On the shortcut menu that opens, left click **Properties** for that folder.
3. A dialogue box opens for properties of the selected folder; click on the **Auto Archive** tab.
4. You can select one of three options:
  - **Do not to archive items in this folder**
  - **Archive items in this folder using the default settings**
  - **Archive this folder using these settings**

If you select “Archive this folder using these settings”, options below it will become active. You can set those to your preferences. Refer to instructions given earlier in this document about these specific items.

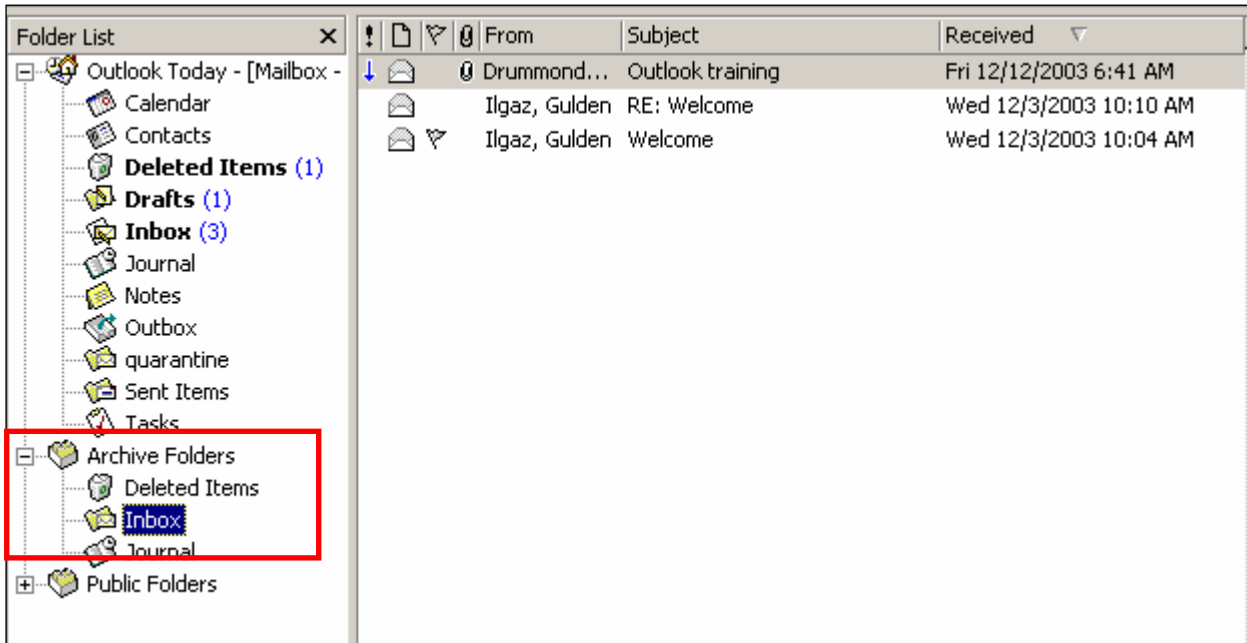
5. Click **OK** when finished.

**Note:** This will need to be done on each folder you want to archive.



You will be able to access your archived folders and their contents from the Folder List view in Outlook. If the Folder List view is not open, from the menu bar, select **View, Folder List**.

The archived folders will be listed in the **Folder List** view under the category of **Archive Folders** as illustrated below. Access items in an archived folder as you would access items in any other folder. **Remember** archived folders and their contents reside on the hard drive of the computer where archiving was setup in Outlook.



The size of archived folders can impact system performance of your PC. If the .pst file becomes too large (exceeds 2 GB) it could lockup your system. It is recommended you create new file names for the archived file (see page 3) periodically depending on how much data is being archived. For example, you may want to create archived files name for each year to make it easier to retrieve if needed and manage the size of the .pst file.

Further, if you are storing critical information in archived files, you will want to backup those files regularly. Since archived files are stored on the C drive of your system, they should be backed up to a network drive or removable media (cd or dvd) for safe keeping.