
Outlook 2003 – Archiving

Quick Reference Card

What is archiving in Outlook 2003?

Basically it's taking "old" entries (e-mail, tasks, appointments, meetings, etc.) and storing them someplace other than on the e-mail server.

Why archive?

A copy of everything contained in the folders under your "Mailbox" (Inbox, Sent Items, Calendar, Tasks, Deleted Items, etc.) is stored on the e-mail server. You are only allotted so much space on the e-mail server. If too many things remain in those folders, your Mailbox will become full and the server, after several unheeded warnings, will stop receiving any new e-mail sent to you. To prevent this from happening you must reduce the space used on the e-mail server by either

- (1) Deleting unneeded items (making sure to empty the Deleted Items folder) or
- (2) Archiving folders containing "old" items.

What do you mean by "old"?

That's really up to you to decide. "Old" for an item in your calendar may be anything older than 2 months from today's date. "Old" for an e-mail may be anything older than 3 week's from today's date. It's really up to you.

Where do archived objects get stored?

Typically they are stored in a file called archive.pst. The location of your archive file is up to you, but it's suggested that archive.pst be saved on drive P, your personal Cuesta drive.

How do I keep archived items organized?

Archived items remain organized the same way they were organized under your Mailbox, in specific folders. Archiving is set up on a folder-by-folder basis. You decide, by folder, if it should be archived and, if so, how old items in that folder should be before being archived. Archived folders are duplicated in the archive file.

What is AutoArchive?

AutoArchive automatically archives at regularly scheduled intervals, based on each folder's settings. AutoArchive is a two-step process:

1. **Configure AutoArchive** by deciding:
 - How often should AutoArchive run
 - What age should items be before affected by AutoArchive
 - What happens to the items affected by AutoArchive
 - i. Are they archived (moved) or deleted?
 - ii. If archived, to where are they moved?
2. **Configure individual folders** by deciding:
 - Will AutoArchive will affect folder contents or not
 - Should rules for archiving the folder should be based on the AutoArchive settings or custom settings

Archiving *removes** the contents of a folder based on the age (date) of the item, adding those items to an external archive file. You can archive the contents of any type of folder *except the Contacts folder*.

*NOTE: **Exporting** *copies* any type of folder in Outlook to an external source, in contrast to archiving which *removes* a folder's contents.

Once you've (1) configured how and when AutoArchive should run and (2) selected which folders will be affected by AutoArchive, there's little else to do but wait. When AutoArchive automatically starts, it will display a dialog box asking if you want it to run (assuming you've selected "Prompt before AutoArchive runs" when configuring AutoArchive.) Select "Yes" and AutoArchive will clear only items in folders you've designated, moving or deleting them based on folder and/or AutoArchive settings.

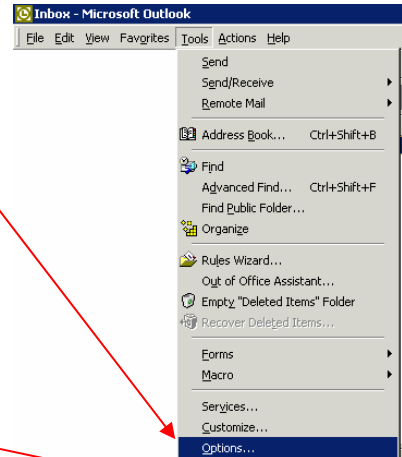
Manual Archive

You may also manually archive, either:

- Forcing AutoArchive to run outside of its programmed schedule
- Archiving a single folder (and its subfolders) based on custom settings.

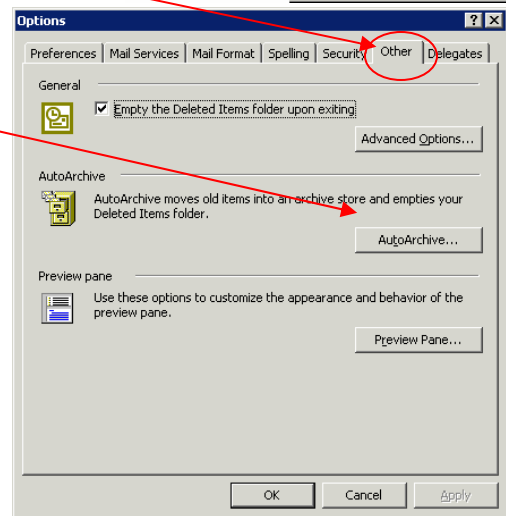
Configuring AutoArchive

1. Select **Tools > Options...** from the Outlook 2003 menu bar.



The Options dialog box will appear.

2. Select the **Other** tab from the Options dialog box.

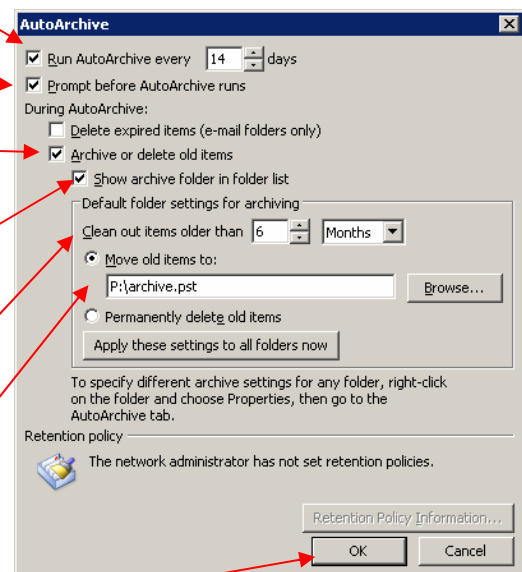


3. Click the **AutoArchive** button.

The AutoArchive dialog box will appear.

4. Select the appropriate options on the AutoArchive dialog box:

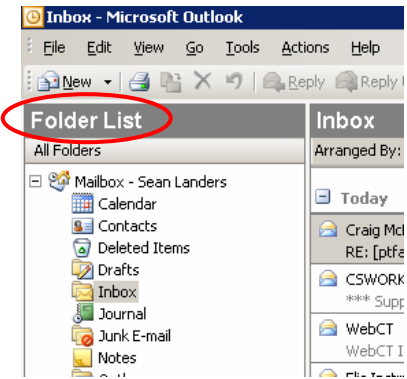
- a. Select (check) “**Run AutoArchive every xx days**” and enter the number of days between archives.
- b. Select (check) “**Prompt before AutoArchive runs**” to have the system display a confirmation screen before running.
- c. Select (check) “**Archive or delete old items**”. (You specify whether to archive *or* delete further down in the dialog box.)
- d. Select (check) “**Show archive folder in folder list**” to have the archived data accessible via the Folder List immediately after autoarchiving.
- e. Enter the “age” of items to be archived based on a number of days/weeks/months.
- f. Select “**Move old items to:**” and type “**P:\archive.pst**” as the location.



5. Click the “**OK**” button at the AutoArchive screen, and again at the Options dialog box.

Configuring Individual Folders to be AutoArchived

If necessary, display the Folder List by selecting **Go > Folder List** from the Outlook 2003 menu bar.

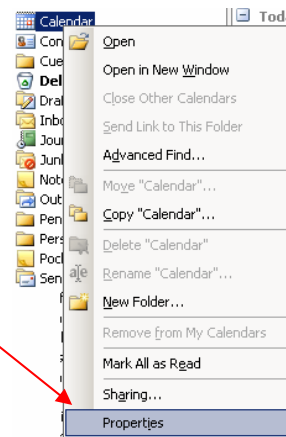


1. Right-mouse click on the folder you wish to customize.

A shortcut menu will appear beside the selected folder.

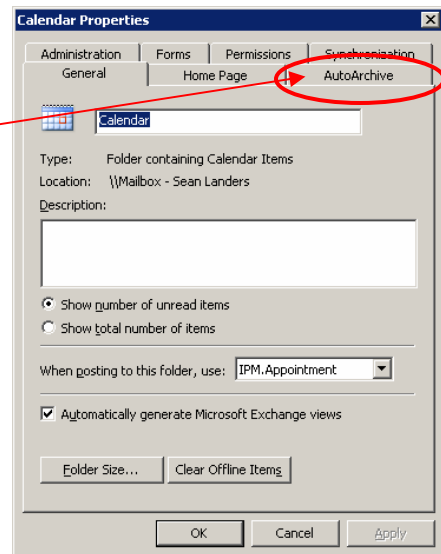
2. Select **“Properties”** from the shortcut menu.

The folder Properties dialog box will appear.



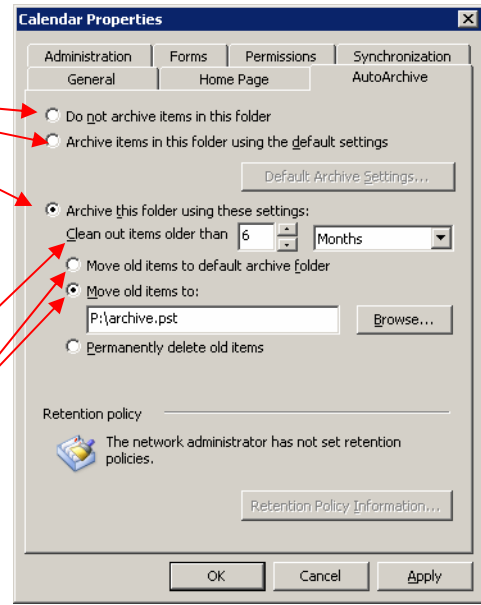
3. Select the AutoArchive tab from the folder Properties dialog box.

The AutoArchive portion of the folder Properties dialog box will be displayed. (See image on next page.)



4. Select the desired options on the AutoArchive portion of the folder Properties dialog box.

- a. Select whether you want to:
- Avoid archiving the selected folder
 - Archive the selected folder using the default settings (see “Configuring AutoArchive”)
 - Archive using custom settings
- b. If you select custom settings:
- Enter the “age” of items to be archived based on a number of days/weeks/months.
 - Select where to “Move old items to:” (We recommend “P:\archive.pst”.)



5. Click “OK” to save your settings for the selected folder.
The dialog box will close and the settings saved.

Manually Running AutoArchive

AutoArchive runs automatically based on preset options. However, you may wish to run AutoArchive at times other than what is preset.

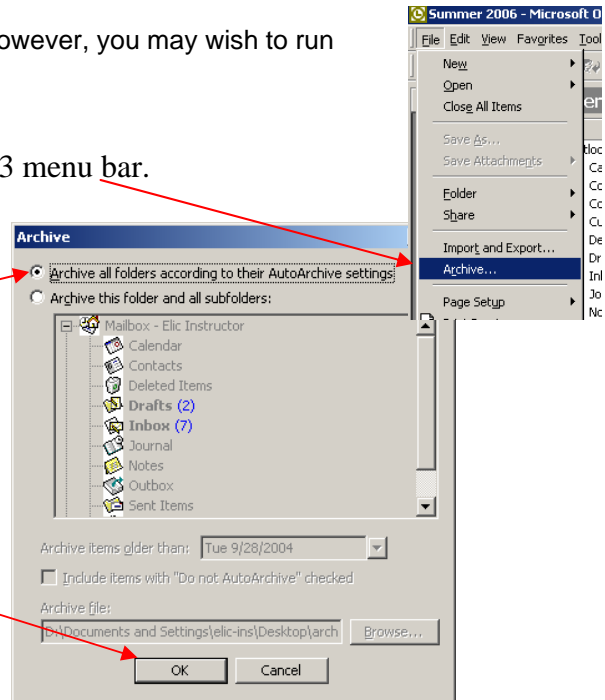
1. Select **File > Archive...** from the Outlook 2003 menu bar.

The Archive dialog box will appear.

2. Select “**Archive all folders according to their AutoArchive settings**”.

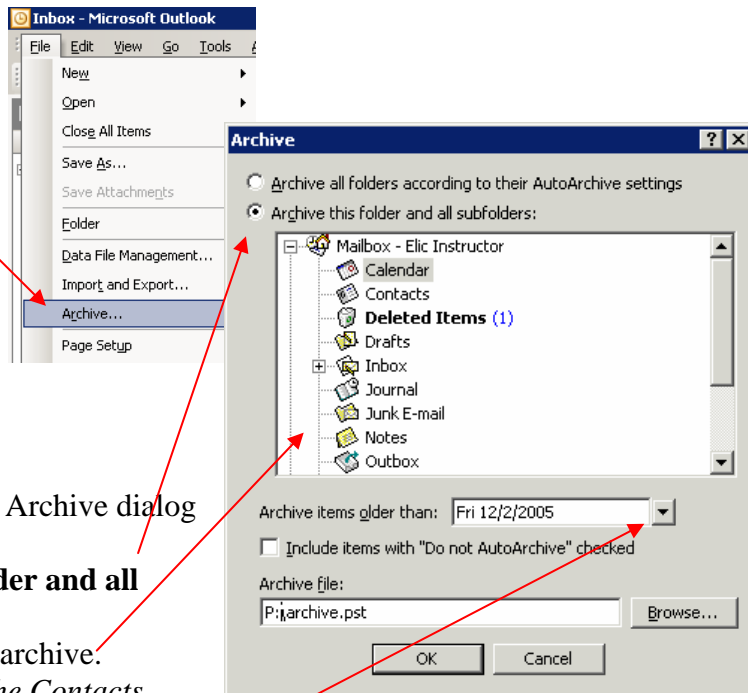
All the folders in the Mailbox will be highlighted.

3. Click the “**OK**” button.
AutoArchive will start.

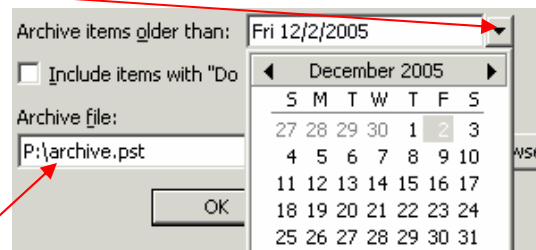


Archiving a Single Folder in Outlook 2003

1. Select **File > Archive...** from the Outlook 2003 menu bar.



2. Select the appropriate options on the Archive dialog box.
 - a. Make sure **“Archive this folder and all subfolders:”** is selected.
 - b. Select the folder you wish to archive.
NOTE: You cannot archive the Contacts folder.
 - c. Select the date you wish to **“Archive items older than”** by clicking its drop-down arrow.
 - d. If you wish to archive a folder’s contents, regardless of its archive properties, select **“Include items with ‘Do not AutoArchive’ checked”**.
 - e. It is recommended that the **“Archive File”** location be set to:
P:\archive.pst



3. Click the **“OK”** button.

The contents of the selected folder with dates older than the selected date will be moved and added to the archive.pst file. Also an “Archive Folders” category will appear in the Folder List.

Opening Archive Folders

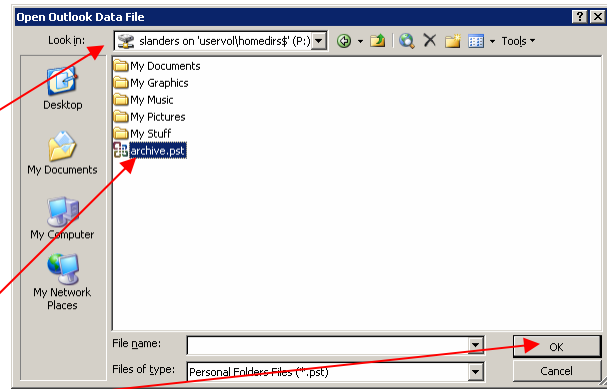
1. Select **File > Open > Outlook Data File** from the Outlook menu bar.

The Open Outlook Data File dialog box will appear.

2. If necessary, select the folder (under “Look in:”) where your archive file is located.

The recommended location is P:

3. **Select** (click once on) the **archive.pst** file.

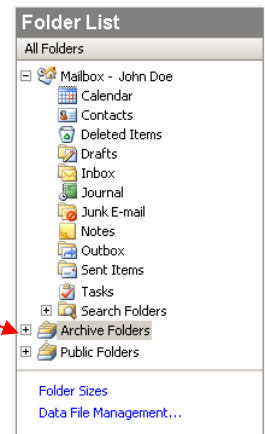


4. Click the **OK** button.

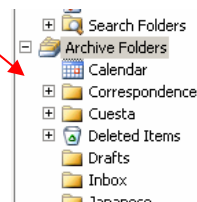
“Archive Folders” will appear in the folder list.

5. Expand Archive Folders by clicking on the plus sign (+) to the right.

Archive Folders will expand, displaying subfolders underneath.



6. Select the desired folder under the Archive Folders to view its contents.



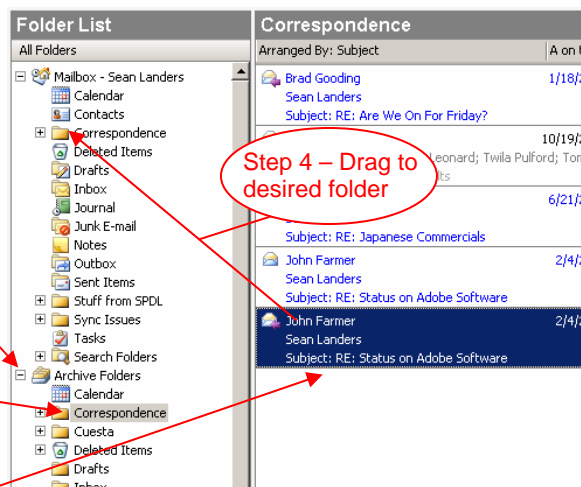
Closing Archive Folders

1. In Outlook’s folder list, right-mouse click on **Archive Folders**.
A shortcut menu will appear.
2. From the shortcut menu, select **“Close Archive Folders”**.
Archive Folders will no longer appear in the Folder List

Restoring (Moving) Individual Archived Items into Any Folder

If necessary, display the Folder List by selecting **Go > Folder List** from the Outlook menu bar.

1. If necessary, expand the **Archive Folders** by clicking the minus sign (-) to the left of “Archive Folders”.
2. **Select the folder** containing the items you want to move.
3. **Select the items** you want to move.
4. **Drag** the selected to the desired **folder** in the Folder List.
A small rectangle will appear by the mouse pointer as you drag. When you release the mouse button, the selected items will be moved.



NOTE: If you hold down the **[Ctrl]** key while dragging, you will *copy* rather than *move* the selected items.
A small rectangle with a plus sign (+) will appear by the mouse pointer as you drag.

Important! Do not release the **[Ctrl]** key until *after* you have released the mouse button.

Restoring (Copying) Archived Folder Back To Its Original Location

1. Select **File > Import and Export...** from the Outlook menu bar.

The Import and Export Wizard dialog box will appear.

2. Select **Import from another program or file** from the dialog box, and then click the **Next** button.

The Import a File dialog box will appear.

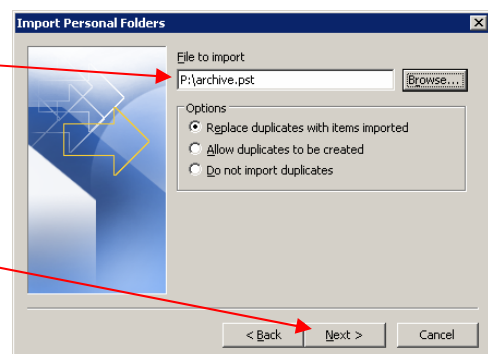
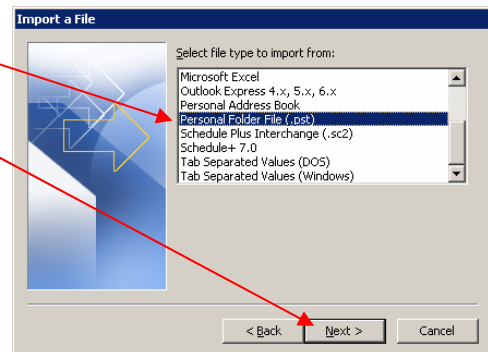
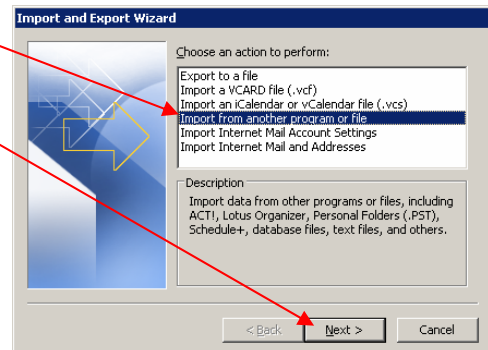
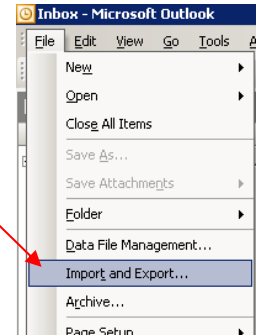
3. Select **“Personal Folder File (.pst)”** from the Select file type to import from, and click the **“Next”** button.

The Import Personal Folders dialog box will appear.

4. In the “File to import” field, **verify** that the **name** of the archive file you're importing from appears there. Example: P:\archive.pst

5. Click the **“Next”** button.

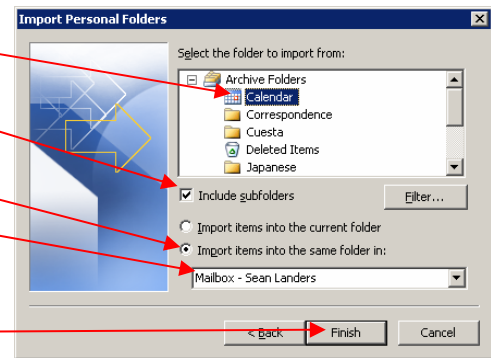
A (second) Import Personal Folders dialog box will appear.



6. **Select the folder** to import from.
If appropriate, click “Include subfolders”.

7. Click “**Import items into the same folder in**”,
and then select “**Mailbox – yourname**”
from the drop down list.

8. Click the “**Finish**” button.



*A status window will appear showing import progress.
When the Import status window disappears, the import
is complete.*

