

HOW TO SETUP AND MANAGE OUTLOOK DATA FILES (ARCHIVE FILES) IN MICROSOFT OUTLOOK 2016

Think of "archive" emails as an electronic filing cabinet. Archiving is recommended for e-mails that have been read, processed and no longer require any action (i.e. e-mails that you don't delete, don't need to do anything about, and yet still need for business or legal purposes or to simply store away 'just in case').

UNDERSTANDING ARCHIVING IN MICROSOFT OUTLOOK

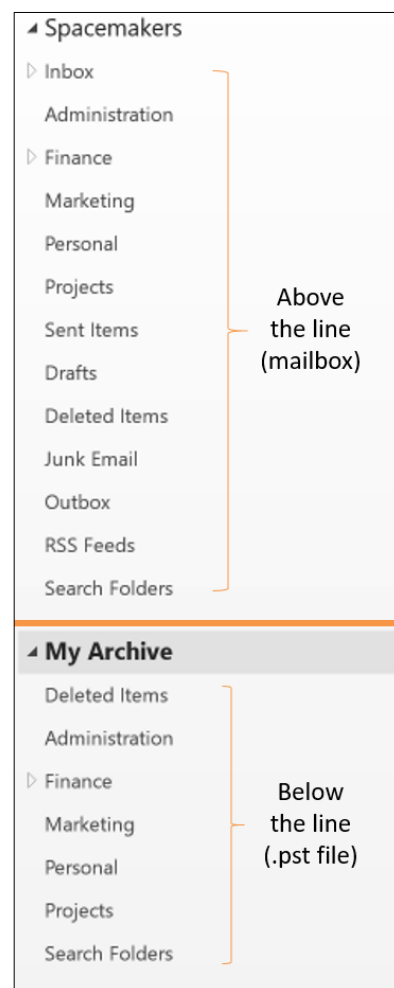
Microsoft Outlook allows you to create folders to store or file away archive-type emails.

We generally describe this method of archiving as your 'personal archive' setup (to differentiate it from other organisational-wide record keeping systems).

Microsoft Outlook provides two ways of setting up personal archive folders.

We refer to these as; a) above the line (i.e. folders under your Mailbox), and b) below the line (i.e. folders setup in your Archive, called an Outlook Data file, or .pst file).

The horizontal 'orange line' in the screenshot is the line that separates your Mailbox (above the line) from your Archive/Outlook Data file (below the line)



YOUR MAILBOX IS FULL (UNDERSTANDING THAT ANNOYING MESSAGE)

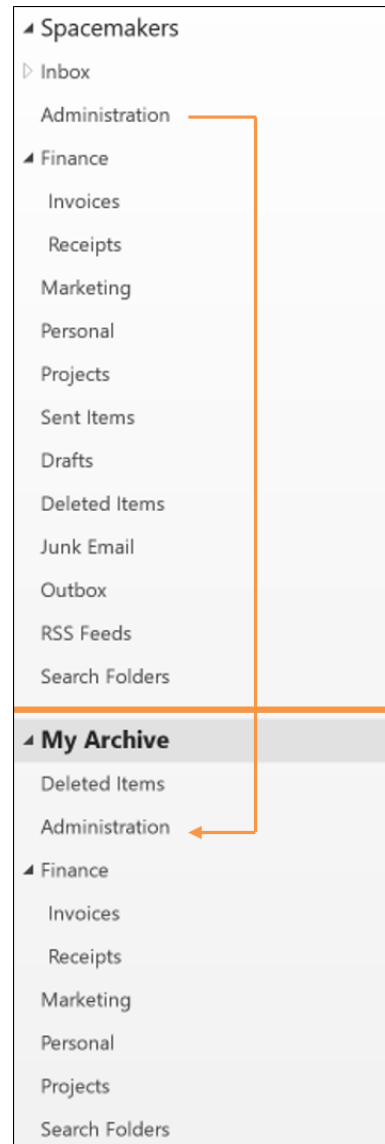
If you work for an organisation, it's likely that you have a limited amount of storage space in your Mailbox.

You may have experienced that annoying message, warning you that your Mailbox is full – that's an indication that you've reached your allowed storage limit.

Normally, the "Mailbox is full" message relates to those emails that are stored 'above the line' (i.e. that make up part of your Mailbox). In the screenshot, the Mailbox includes all emails stored in folders between (and including) the Inbox and Search Folders.

In many organisations, the Mailbox is backed up regularly, with emails accessible from multiple devices (i.e. phones, tablets, networked computers). This is the advantage of setting up personal archive folders in your Mailbox. One disadvantage of archiving emails in 'above the line' Mailbox folders is that you often run out of storage space!

This is why Microsoft Outlook provides a 'below the line' archiving option.



Emails and folders stored 'below the line' are part of an Outlook Data file (or .pst file), saved on a physical computer (depending on your organisation).

Typically, there's no storage limit and no 'Mailbox is full' message. That said, a disadvantage of 'below the line' archiving is that emails are NOT usually backed up automatically or made available on phones, mobile devices or other networked computers.

Therefore, one way to free up personal archive space is to move emails from 'above the line' folders (your Mailbox) to 'below the line' folders (an Archive / Outlook Data File). This allows you to keep an extensive personal email archive without getting that annoying "Mailbox is full" message!

The advice provided above is generic information. Some organisations do not allow staff to use 'below the line' personal archive folders. Check your organisations record keeping policies before setting up folders.

WHAT IS A .PST FILE?

Microsoft Outlook uses an Outlook Data file (ending with ".pst") to archive emails and free up space on workplace servers.

They are typically saved under My Documents (local drive)/Outlook and can be opened, closed or read directly from Microsoft Outlook (your e-mail program). Like any file, you can create, change the name, copy / backup, move or delete .pst files (your archived e-mails).

Unlike other files (i.e. ".doc" Word files), you cannot (or are sometimes not given permission to) save .pst files on network drives as they are huge files and can crash the server. Your archive therefore can only be located on the physical computer / desktop that it is saved on... a challenge for staff working from centre to centre.

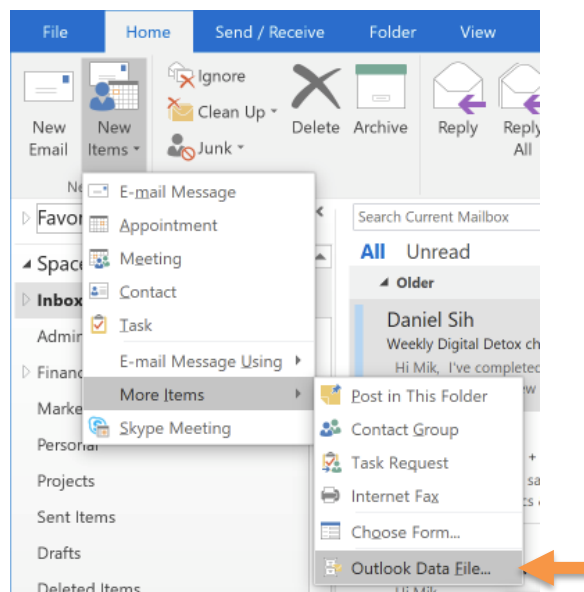
The advice provided below is generic information. Please check your organisations archiving policy to find answers specific to your work situation.

HOW DO I CREATE A NEW ARCHIVE (OUTLOOK DATA) FILE?

Follow the instructions below to create an Outlook data file and kick-start your killer archive.

Note: instructions may differ slightly if using other versions of Microsoft Outlook

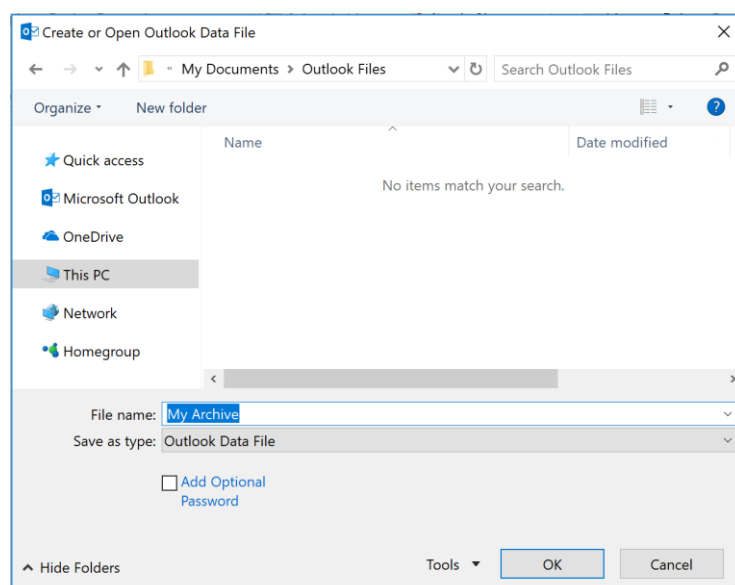
To create an Outlook Data File (.pst) for archiving, open Microsoft Outlook and select the **Home** tab, **New Items**, then **More Items** and finally select **Outlook Data File...**



A dialog box will open with the title **Create or Open Outlook Data File**.

Type an appropriate name into the **File name** field (in this instance we are using 'My Archive').

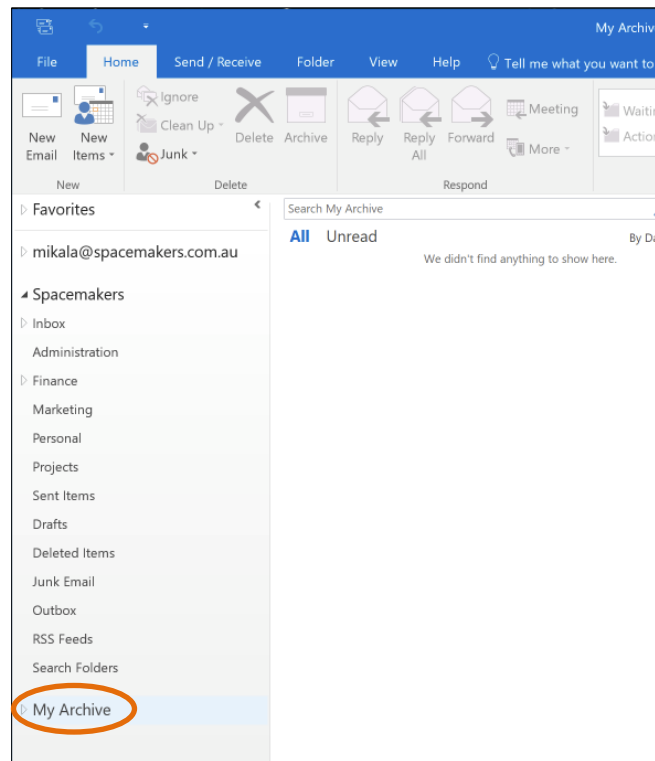
Click OK to create the file.



In the navigation pane, you will now see the new folder you have created.

Click on the arrow bullet next to your new archive to expand the folder.

You can create subfolders underneath this folder the same way you create them in your inbox.



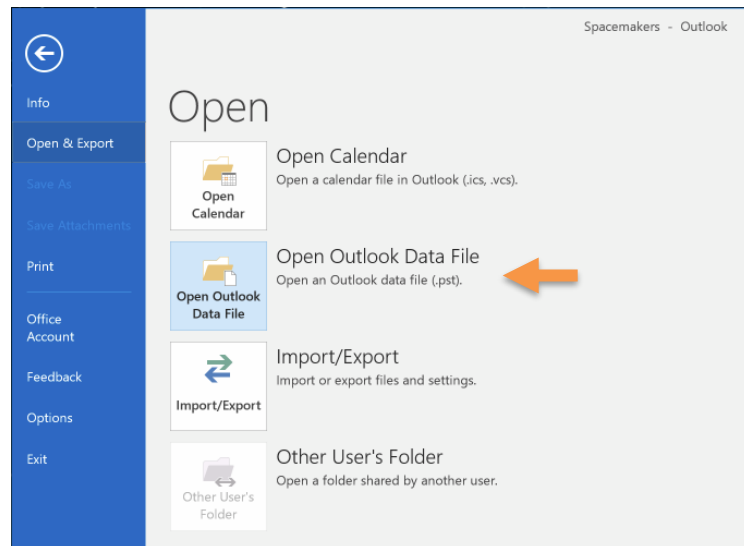
HOW DO I OPEN OR CLOSE AN EXISTING ARCHIVE (OUTLOOK DATA) FILE?

An archive (Outlook data) folder file is opened and closed from within Microsoft Outlook (i.e. your e-mail program).

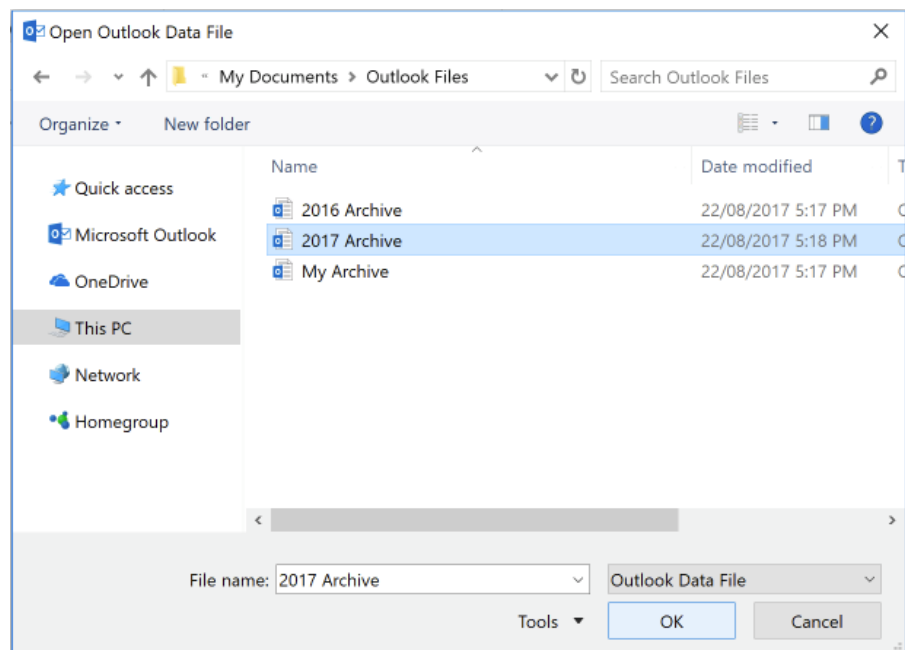
Unlike other files (i.e. .pdf or .docx files), you *cannot* open an archive folder file (.pst extension) directly from the icon itself (i.e. by double clicking on the file under My Computer).

Once understood, opening and closing an archive (Outlook data) folder file is simple.

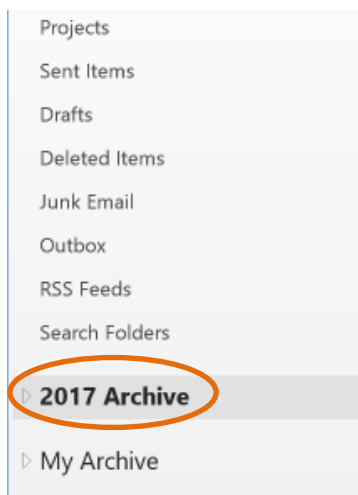
Just click on **File** tab,
select **Open & Export**,
and then select **Open
Outlook Data File**.



Select the archive
(Outlook data) folder file
that you wish to open, and
click 'OK'.

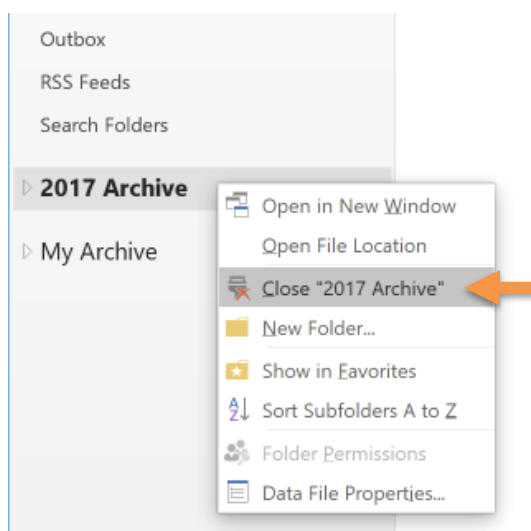


Your selected archive folder will appear in your Mail Folders.



To close an archive (Outlook Data File) folder, simply left click on the folder then **right click** and select **Close**.

Note – closing a file does not delete the file. It just closes it so it can no longer be viewed from within Outlook.



HOW TO MAINTAIN A SINGLE PERSONAL ARCHIVE IF WORKING ON DIFFERENT COMPUTERS

Each archive (Outlook Data File) folder file is usually stored on the local drive (My Documents) of each computer, and is therefore not accessible when using other computers. This may be particularly problematic for people who work regularly on different computers between different work sites.

Most workplaces prohibit the use of .pst files on network drives due to their large size and the small (but serious) risk that use of these files may 'crash' the server. Apparently, this makes IT-help people cranky!

A number of potential solutions exist yet here is one we find simple and workable. We call it mirroring.

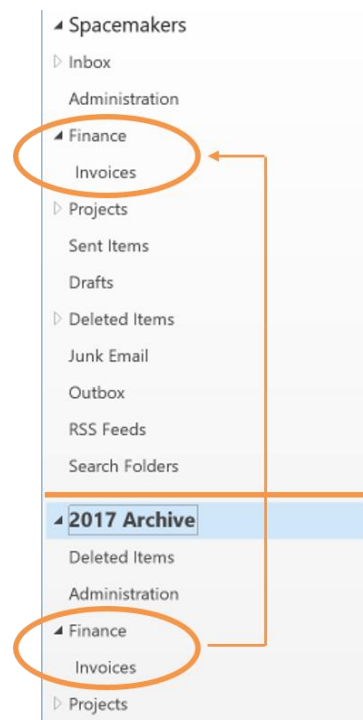
ABOVE-BELOW THE LINE 'MIRRORING' USING IDENTICAL ARCHIVE SUB-FOLDERS

This potential solution for archiving across worksites involves a bit of double handling, but is simple enough to establish and fairly easy to use. It only works when people archive using just a handful of broad folders (piling, not filing).

How to create an identical set of folders under your mailbox to 'mirror' folders used in your archive:

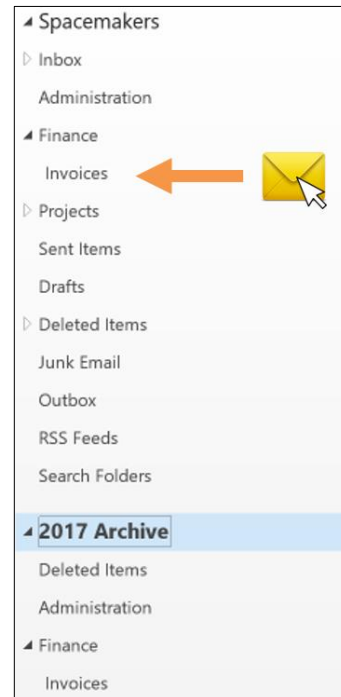
Step A: Identify a primary computer (i.e. the work station you most commonly use) and establish an Archive (Outlook Data File) folder file 'below the line'. Create broad subfolders inside your personal archive as described above.

Select your **Mailbox** and create a set of identically named subfolders 'above the line' to *mirror* those established in your archive.



Step B: When processing your e-mail, simply drag and drop e-mails into appropriate 'Mailbox' folders.

The benefit of this method is that emails stored in Mailbox folders may be viewed from any computer (until you run out of space ... see step C!)



Step C: Moving files from 'above the line' Mailbox folders to 'below the line' Archive folders:

Emails in your **Mailbox** are counted against your **total storage limit** ... so at regular intervals, you will need to select and drag all e-mails (**Ctrl A, drag**) from Mailbox folders to your 'mirrored' **archive folders**.

Do this when working from your 'primary' computer.

It only takes a few minutes and is a very efficient way of bulk archiving older emails, to give you more space.

