



MCS Exchange

Archiving & Creating Folders in Outlook 2007

Document Description: How to set up/adjust an AutoArchive, run a manual archive, create a personal archive (.pst), create a folder to file messages, and move messages to the personal archive.

For user by: All staff on the Exchange email server using Outlook 2007.

Quick Start:

Setting Up/Adjusting an AutoArchive:

- 1) From the **Tools** menu, select **Options...**
- 2) Navigate to the **Other** tab
- 3) Click the **AutoArchive...** button
- 4) Change settings to those shown in the diagram or as desired

Running a manual archive:

- 1) From the **File** menu, select **Archive...**
- 2) Select the **Archive all folders according to their AutoArchive settings** radio button
- 3) Click **OK**

Setting up an archive (.pst) file:

- 1) From the **Tools** menu, select **Options...**
- 2) Navigate to the **Mail Setup** tab
- 3) Click on the **Data Files...** button
- 4) Click on **Add...**
- 5) Highlight **Office Outlook Personal Folders File (.pst)**
- 6) Click **OK**
- 7) **Select a location** and save the .pst file
- 8) **Type in an archive name** (i.e. Unikey ID)
- 9) Click **OK**
- 10) **Type in a name** for the personal folders
- 11) Click **OK, Close & OK** (to complete the .pst file setup)

Creating a folder:



- 1) Right-click on the folder list where you see your archive file, Select **New Folder...**
- 2) **Type a name** for the new folder
- 3) Click **OK**

Moving messages to a folder:

- 1) **Right Click on the message** to be moved
- 2) Click the **Move to Folder** button
- 3) **Select the folder** to move the message to

Determining your PST file location:

- 1) **Right-click** the **archive** folder to check
- 2) Select **Properties**
- 3) Click the **Advanced...** button
- 4) View the location specified in the **Filename** field

1. Background

The purpose of this document is to demonstrate how to create an archive (.pst) file structure, run a manual archive process, and adjust the settings of Auto-archive within Outlook 2007.

PST files or a Personal Folder File are files used by Outlook to store personal data. For example, old email messages can be *archived* to a PST file. One of the advantages of using PST files is that they can be used to store and access email messages without them having to sit on the actual mail server (they can be stored locally on the C drive or stored on a personal network drive, such as Z or P).

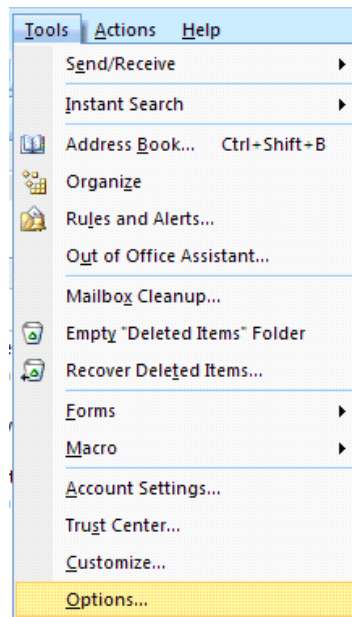
At The University of Sydney, PST files are used to store the old **Eudora emails, archived messages** and **Contacts**. This document defines existing file locations for these files to assist you in managing your email data.

NOTE: Outlook 2007 must be open for these functions to be used.

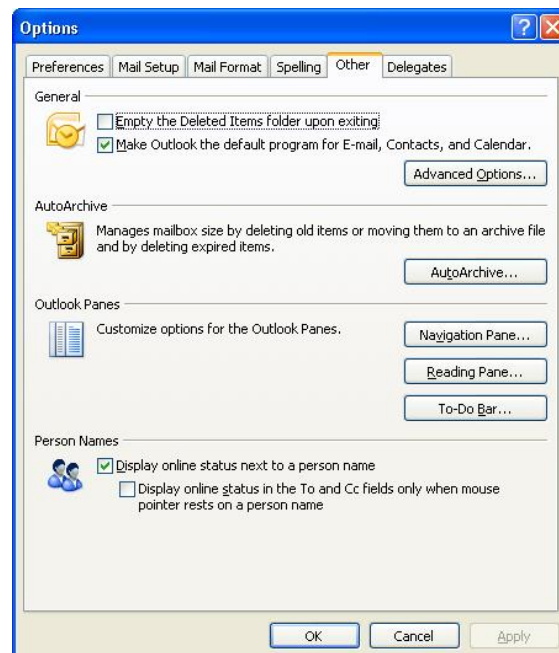


2. Setting up/Adjusting the Auto Archive Settings

2.1. From the Tools menu, select **Options...**

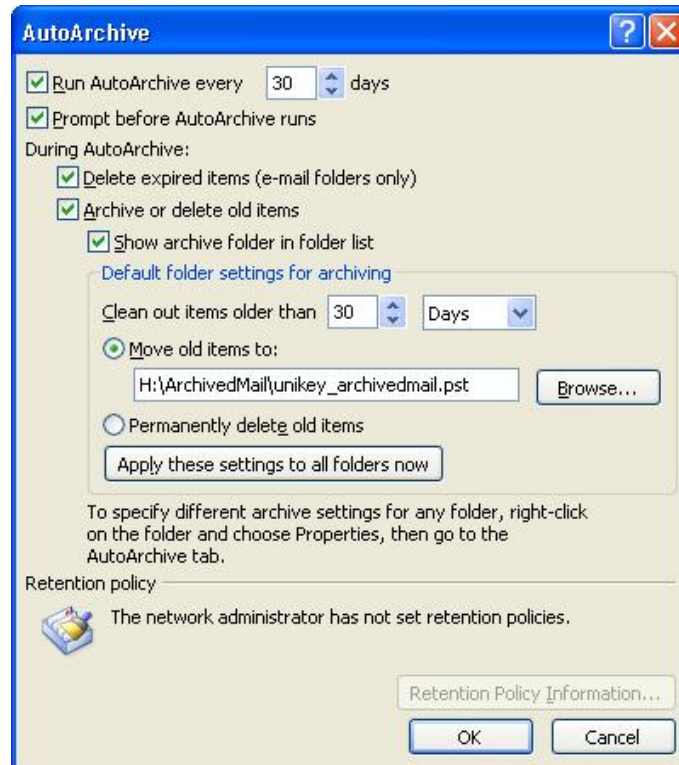


2.2. Go to the tab titles **Other** and select the **AutoArchive...** button





2.3. It is recommended you set the settings for your AutoArchive to match those shown
(NOTE: Where the H: is a network drive to ensure your archive is backed up – it may be different letter/drive to use, so check with your CSO or the ICT Helpdesk in necessary)

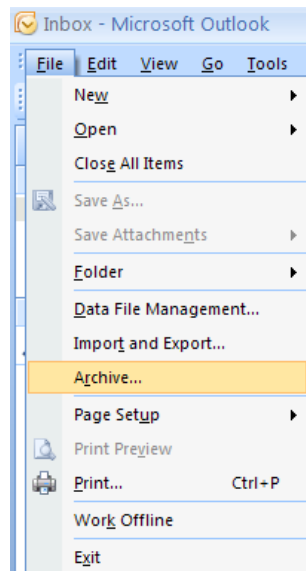


2.4. Once this is done, Client **OK** twice

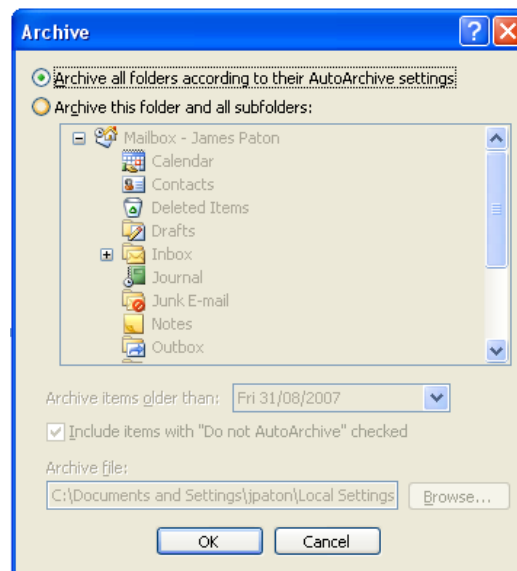


3. Running a Manual Archive

3.1. From the **File** menu select **Archive...**



3.2. Select the settings **Archive all folders according to their AutoArchive settings**



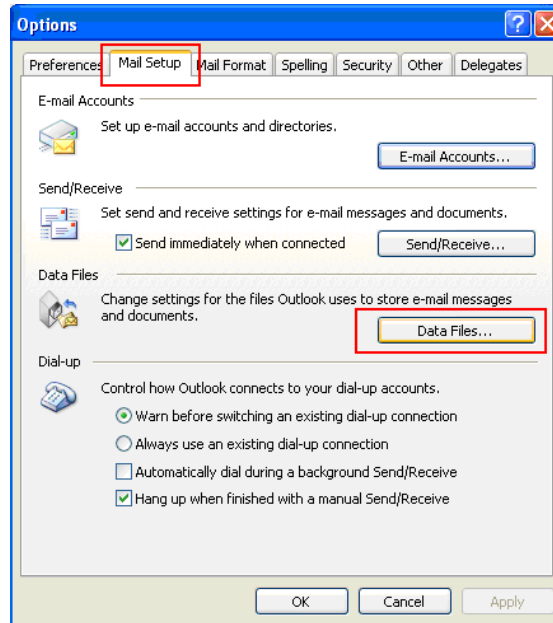
3.3. Click **OK**

You will see it running on the bottom right hand side of the screen in Outlook 2007

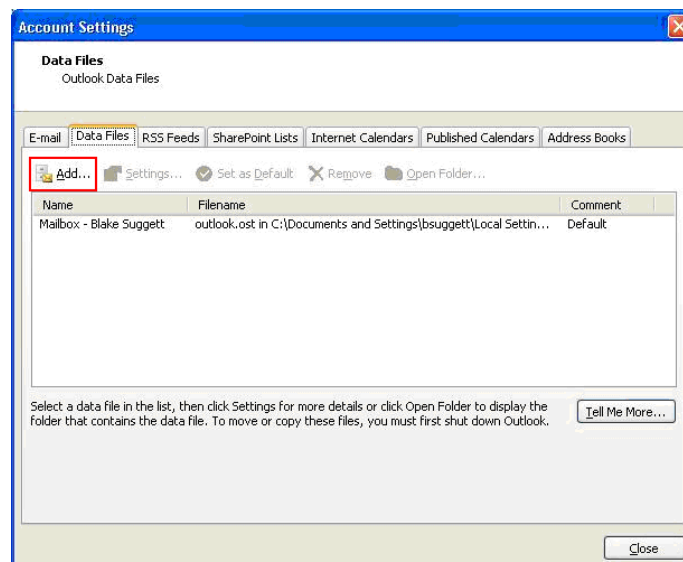


4. Setting up an Archive file (.pst)

4.1. To create a personal folder, click on the **Tools** menu, then select **Options**. Navigate to the **Mail Setup** tab and click on **Data Files...**

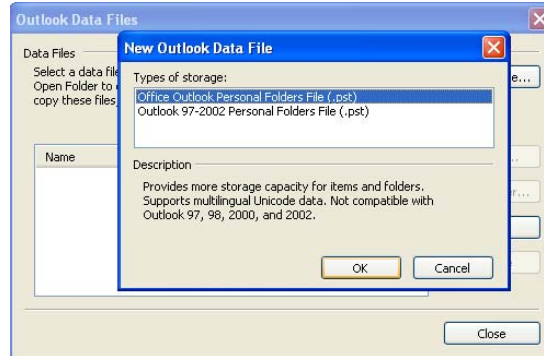


4.2. Click **Add**

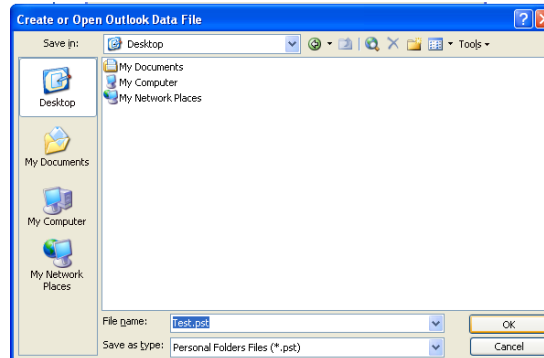




4.3. Highlight **Office Outlook personal Folders File (.pst)**, then click **OK**

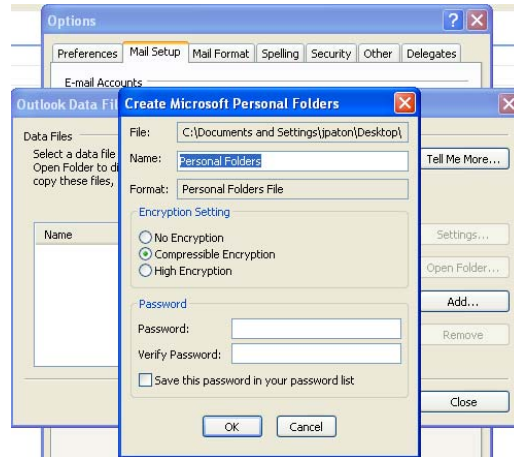


- 4.3.1. Browse to the location where you want to save the file (Check with your departments CSO to confirm a location)
- 4.3.2. Change the filename to your Unikey
- 4.3.3. Click **OK**



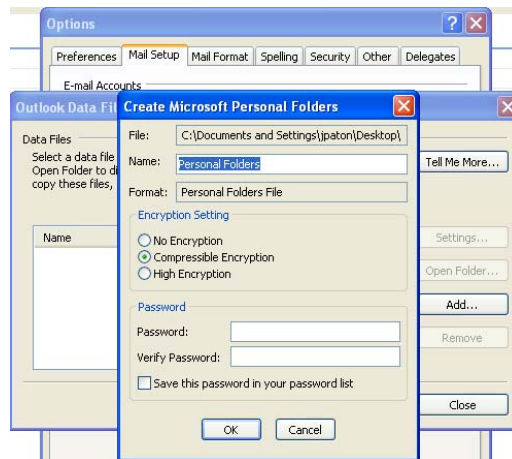


4.4. Type in a **name** for the personal folders, then click **OK**



4.5. To finish, click **Close** and then **OK**

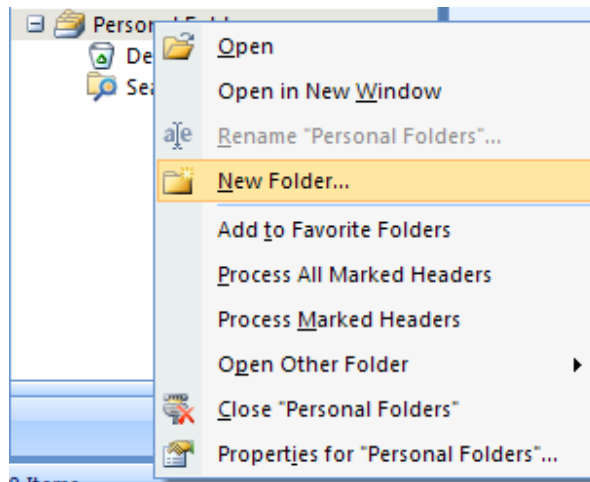
4.6. Now that the personal folder (.pst) has been created, you can start to create the folders you want to store your email in.





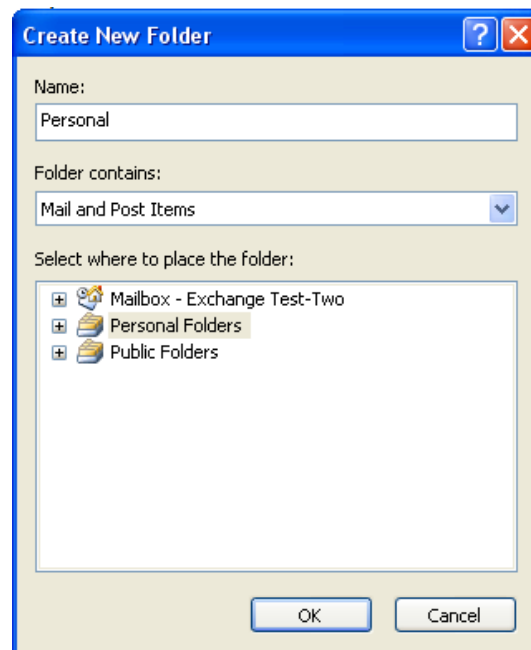
5. Creating a folder

5.1. To create a folder, right click on "Personal Folders" and click on **New Folder...**



5.2. **Type in the name** you want to call the folder (in this example we called the folder Personal). Click **OK**

Note: follow this process to create additional folders and sub-folders (a folder within another folder).

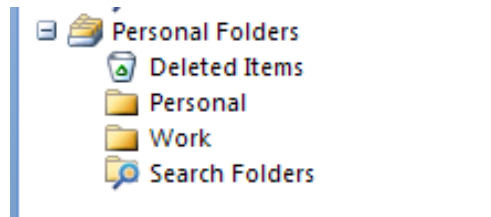




6. Moving messages to your folder

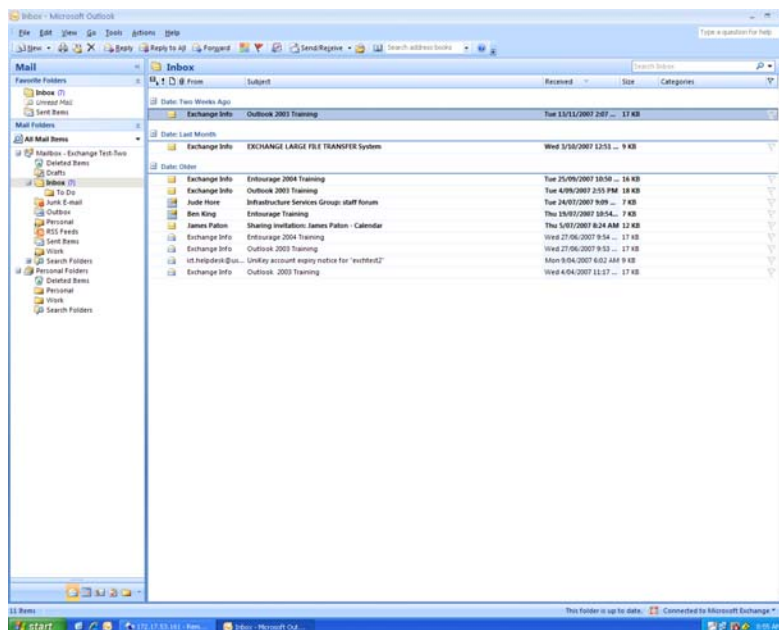
6.1. Now you will have a folder under Personal Folders that you can store email messages in.

You can now drag messages into the folder(s).



6.2. Drag and drop messages

- 6.2.1. **Click the message** to be moved
- 6.2.2. **Hold down the left mouse button**
- 6.2.3. **Drag the message** across the screen to the designation folder (until the folder becomes highlighted as shown)
- 6.2.4. **Release the left mouse button**

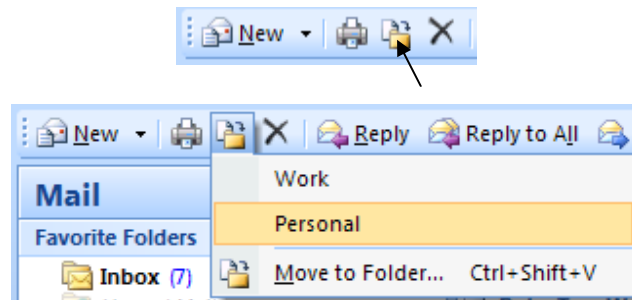


6.3. To use the **Move to Folder** method:

- 6.3.1. **Click the message** to be moved
- 6.3.2. Click the **move to Folder** button



6.3.3. From the drop down menu, **click the folder** (in this example the “personal folder”) you want to **move the message to**





7. Outlook default PST file location

By default, MS Outlook places PST files in a pre-determined location. This location is as follows:

C:\Documents and Settings*<user>*\Local Settings\Application Data\Microsoft\Outlook

(where <user> above is a reference to your username/Unikey)

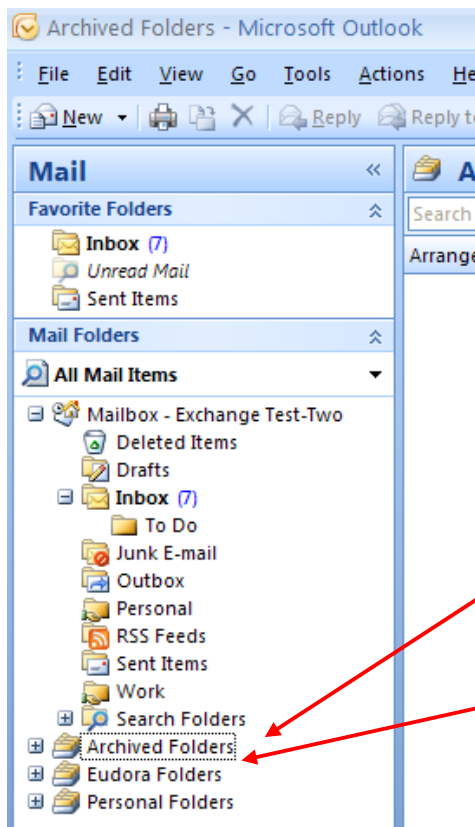
Sydney University staff however have their PST files located at the following:

Network Drive:\Personal\Outlook

(where Network Drive may be P:, Z:, H:, etc depending on your faculty set up)

Inside the Outlook folder, you will see at least one PST file.

Please note that at The university of Sydney most employees have at least two PST files, one under **Eudora Folders** and one under **Archive Folders**. All staff also have another PST file for their **Contacts** however this file sits directly on the email server and will automatically follow you from computer to computer.



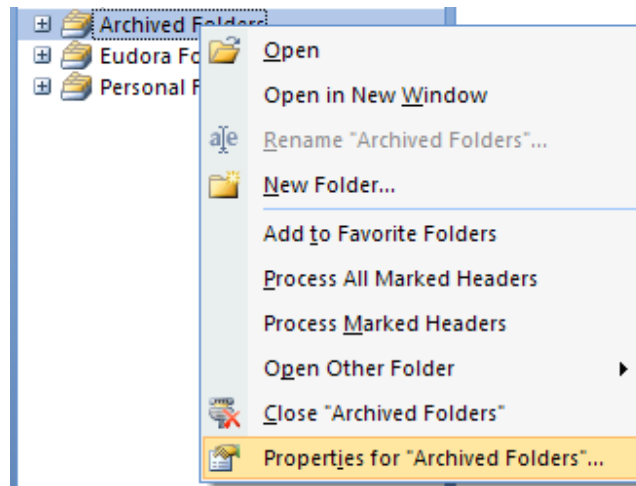
The Archived Folders in your Navigation Pane.

The Eudora Folders in your Navigation Pane.

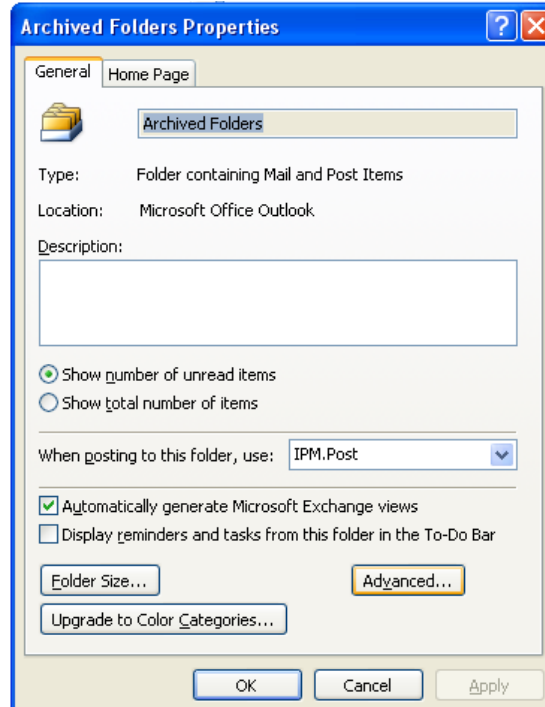


8. Determining your PST file location(s)

8.1. **Right-click** on the Eudora **Folders** or archive Folders and select **Properties**



8.2. Click on the **Advanced...** button





8.3. The Personal Folders box opens detailing the **Filename** and location of your PST file as shown.

NOTE: By following the steps above, you will be able to identify the path and filename for your PST files. If by doing this you determine that your file(s) are not sitting in the correct location, contact your local IT to have the file moved and your Outlook correctly configured.

