

NCI Technologies presents:

# Microsoft® Office Outlook® 2003 Training



**File or archive your e-mail on  
your own computer**

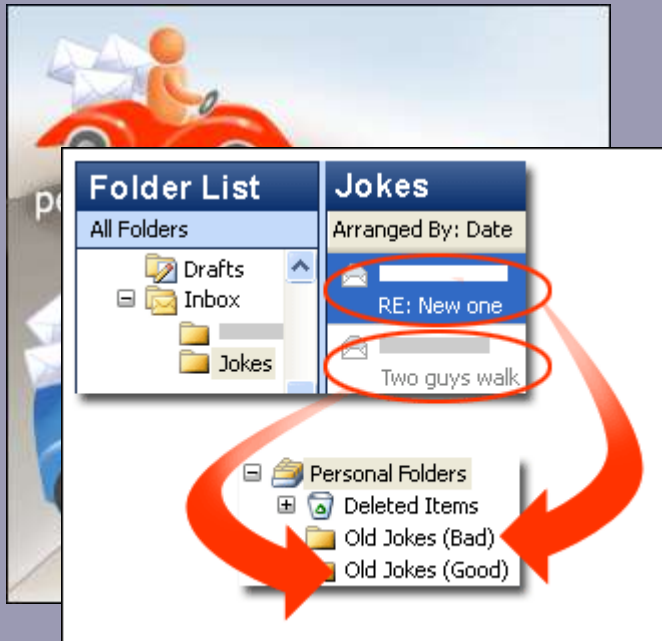
# Course contents

- Overview: Get control of your e-mail
- Lesson 1: Why move e-mail?
- Lesson 2: AutoArchive is effortless
- Lesson 3: Get personal with Personal Folders

Each lesson includes a list of suggested tasks and a set of test questions.

File or archive your e-mail  
on your own computer

# Overview: Get control of your e-mail



Do you get messages from your system administrator telling you that you're keeping too much e-mail on the server? Are you perplexed every time Outlook tells you it's ready to archive your e-mail? Are you mystified by Personal Folders?

If you answered "yes" to any of these, you'll be glad to know that filing and archiving your e-mail can help you regain control.

File or archive your e-mail  
on your own computer

# Course goals

- Stop storing so much stuff on the server. Instead, move it to Outlook personal storage files called PSTs that you keep on your own computer.
- Choose whether to move e-mail to Archive Folders or to Personal Folders, and whether to move it automatically or manually.
- Customize folder names and settings to meet your personal needs and preferences.

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# Lesson 1

## **Why move e-mail?**

# Why move e-mail?



Two routes to a PST file:  
personal folders and  
archiving

Space isn't infinite, at least not on your e-mail system's computer. Sooner or later, you'll want to know how you can create personal storage files for your e-mail messages.

You can store these files locally on your own computer in a personal storage, or PST, file. Then you won't be restricted to size limitations set by someone else.

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# What you gain



Four big benefits to storing in a PST

It may seem as if your e-mail is already on your computer. But if you use a Microsoft Exchange server or an Internet e-mail service, most of your e-mail lives on an e-mail server until you move it.

But move it where? Outlook lets you create local data files, called personal stores (PST files), that really are on your own computer.

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# What you gain



By using Outlook PST files, you gain many freedoms:

**Freedom from nagging.** If you keep everything in the Inbox, and the Inbox resides on a server, you're going to get a message someday saying it's time to clean up your act.

Four big benefits to storing in a PST file

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# What you gain



Four big benefits to storing in a PST file

By using Outlook PST files, you gain many freedoms:

**Freedom from clutter.** With most messages stored in a separate location, you can concentrate on the ones you really need to keep handy.

**Freedom from bulkiness.** PST files can be compressed, making them an efficient way to store messages.

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# What you gain



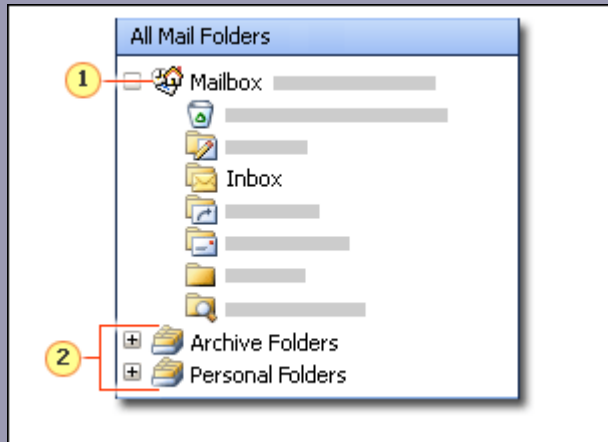
By using Outlook PST files, you gain many freedoms:

**Freedom of movement.** PST files are portable: You can move them from one computer to another, and you can easily store them on a CD.

Four big benefits to storing in a PST file

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# In or out of your Mailbox?



1. Mailbox
2. Archive Folders and Personal Folders

When you receive messages, they're sent to the Inbox. Typically, the Inbox is stored inside the Mailbox, along with Calendar, Contacts, and other folders.

When you store messages locally, you send them to Archive Folders or to Personal Folders, separate data files that are outside the Mailbox.

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# Two roads, one computer



Two routes to storing messages in a PST file

What's the difference between Archive Folders and Personal Folders? The next lessons will explain it all and help you choose which one to use.

And no one says you have to use only one sort of folder or the other. You can use both if you want to!

File or archive your e-mail on your own computer

# Two roads, one computer



Two routes to storing messages in a PST file

It's wise to keep these points in mind from the start:

1. Messages stored in PST files are not accessible from your e-mail server. They're on your own computer, and if you go to another computer, you can't read them unless you take them along yourself.

File or archive your e-mail  
on your own computer

# Two roads, one computer



Two routes to storing messages in a PST file

It's wise to keep these points in mind from the start:

2. Only one person at a time can open a PST file. Even if you share your computer and share permission to access a PST file, each user must close it before another user can open it.

File or archive your e-mail on your own computer

# Test 1, question 1

**To reduce the size of the Mailbox, which of these could you store messages in? (Pick one answer.)**

1. Personal Folders or Archive Folders.
2. A new folder inside the Inbox.
3. A shoebox under your bed.

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# Test 1, question 1: Answer

## Personal Folders or Archive Folders

Either type of folder will work, and the rest of the presentation will describe which one to choose depending on your goal.

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# Test 1, question 2

**What does PST stand for? (Pick one answer.)**

1. Personal Sorting File
2. Personal Store
3. Particularly Stupid Test

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# Test 1, question 2: Answer

Personal Store

You personally store PST files on your own computer.

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# Test 1, question 3

**You've decided to move some e-mail to a PST file. Which of the following should you keep in mind? (Pick one answer.)**

1. If you set up archiving, you're stuck with archiving for life.
2. Once your e-mail is moved to a PST file, you can't access it from the server.
3. AutoArchive is a lazy choice.

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# Test 1, question 3: Answer

Once your e-mail is moved to a PST file, you can't access it from the server.

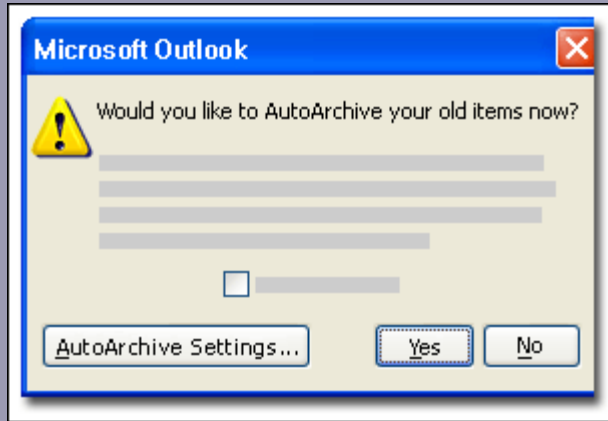
It's on your computer, and the server can't find it.

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# Lesson 2

**AutoArchive is effortless**

# AutoArchive is effortless



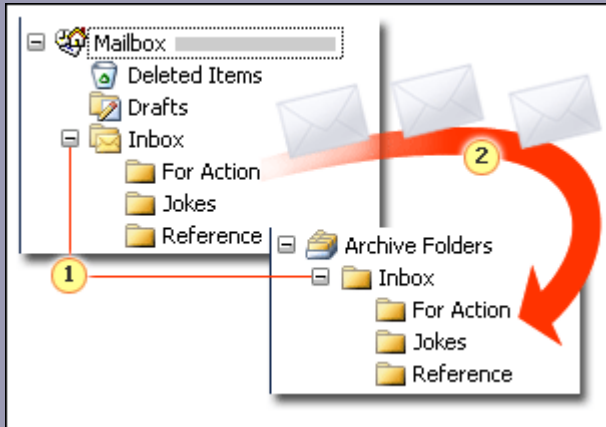
Is this message familiar?

Do you have guilty feelings when you click **No** in this dialog box because you're not really sure what AutoArchive does?

With a little help on the details, you may learn to love AutoArchive. On the other hand, you may find that you prefer to archive manually or to use Personal Folders files. Then you can feel good about saying No.

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# It's automatic



Archive Folders and archived messages

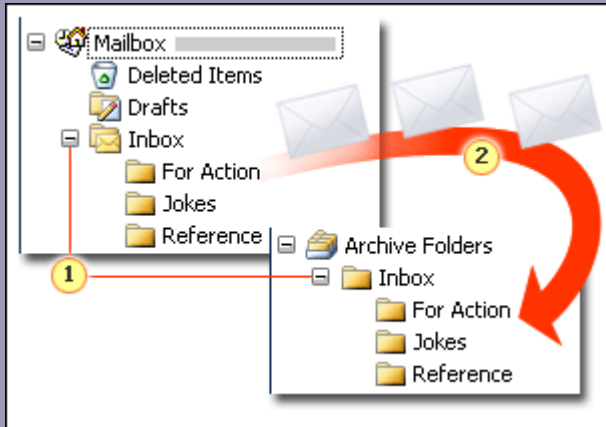
Maybe this sounds like you:

- You never move or delete e-mail messages.
- You may add folders to the Inbox, but you don't change their names or remove them. Once and for good, is your filing motto.

If so, then AutoArchive is for you.

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# It's automatic



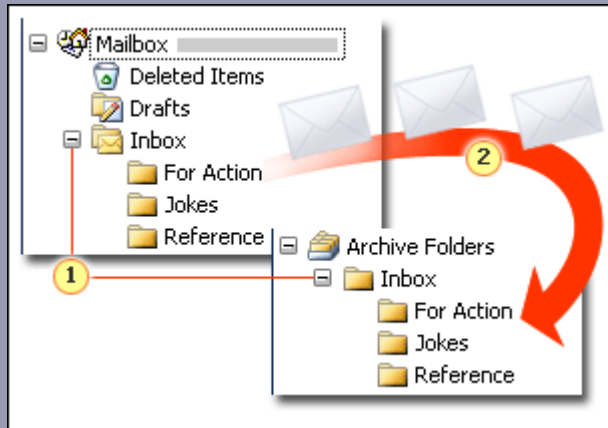
AutoArchive creates its own rules that work behind the scenes (you don't have to bother creating them). In that process, it creates a folder called Archive Folders.

Archive Folders and archived messages

1. Subfolders in Archive Folders are exactly the same as subfolders in Mailbox. Wherever you were used to looking for your messages, the archive looks the same way.

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# It's automatic



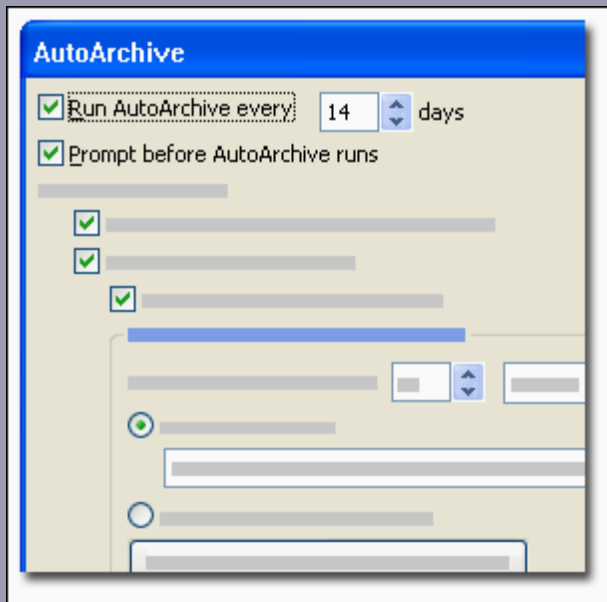
Archive Folders and archived messages

AutoArchive creates its own rules that work behind the scenes (you don't have to bother creating them). In that process, it creates a folder called Archive Folders.

2. Archived messages are removed from Mailbox and placed in the equivalent subfolders in Archive Folders.

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# Is it on?



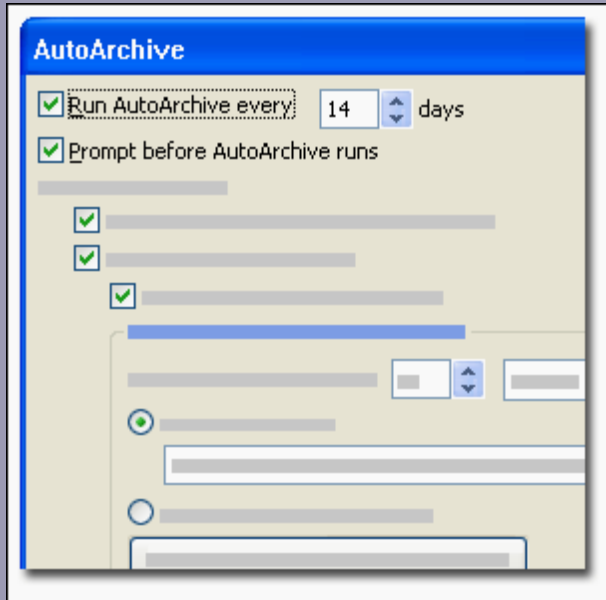
The **Run AutoArchive every** check box in the **AutoArchive** dialog box

You can tell if Outlook is set up to use AutoArchive by opening the AutoArchive dialog box: Click **Options** on the **Tools** menu, click the **Other** tab, and then click **AutoArchive**.

By default, AutoArchive is set to run every 14 days. To change the frequency, change the number in the **days** box.

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# Is it on?



The **Run AutoArchive every** check box in the **AutoArchive** dialog box

Of course, you'll also know that AutoArchive is running if you see the friendly dialog box we showed you at the beginning of this lesson.

If you'd rather not see that dialog box each time AutoArchive runs, clear the **Prompt before AutoArchive runs** check box (shown in the illustration).

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# You do it your way



If you'd like to customize your archiving, Outlook makes it easy to take control.

You can archive different folders at different rates—or not at all. Or you can empty specified folders without archiving their contents.

Different archiving for different folders

File or archive your e-mail on your own computer

# You do it your way



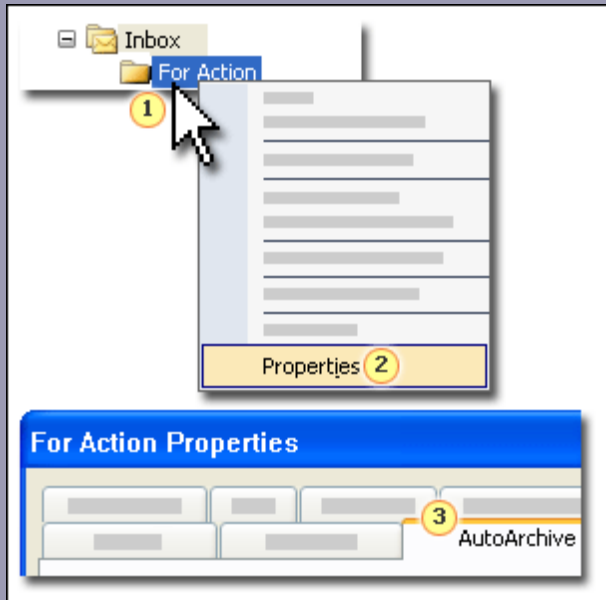
Use the **Properties** dialog box to specify different archiving for different folders:

1. Right-click the folder.
2. Click **Properties** on the shortcut menu.

Different archiving for different folders

File or archive your e-mail  
on your own computer

# You do it your way



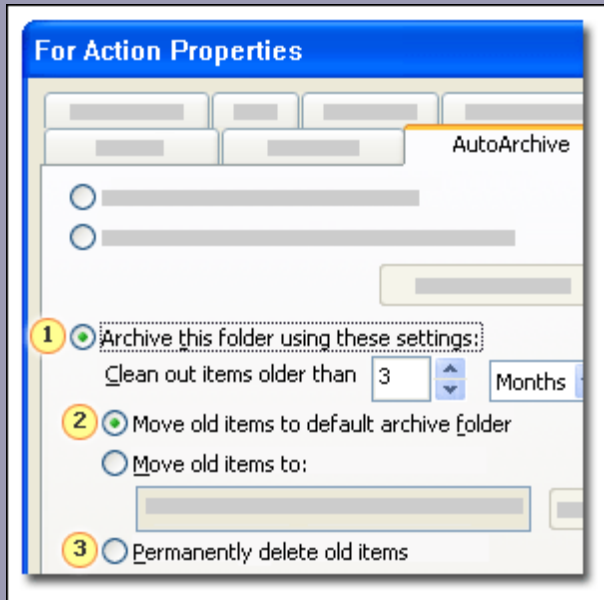
Different archiving for different folders

Use the **Properties** dialog box to specify different archiving for different folders:

3. In the **Properties** dialog box for the folder, click the **AutoArchive** tab and specify archive settings. (In this case, the folder name is "For Action," so the dialog box is called **For Action Properties**.)

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# Choose your settings

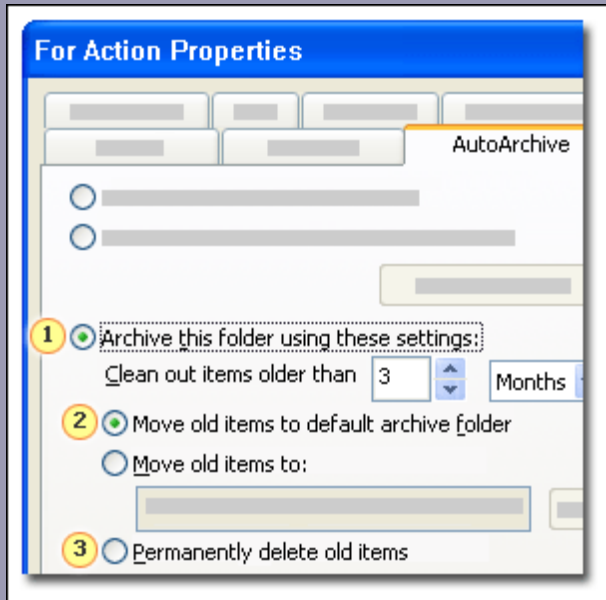


To customize archive settings for a folder, right-click the folder, click **Properties**, and then click the **AutoArchive** tab.

**AutoArchive** tab of the **Properties** dialog box for a folder

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# Choose your settings



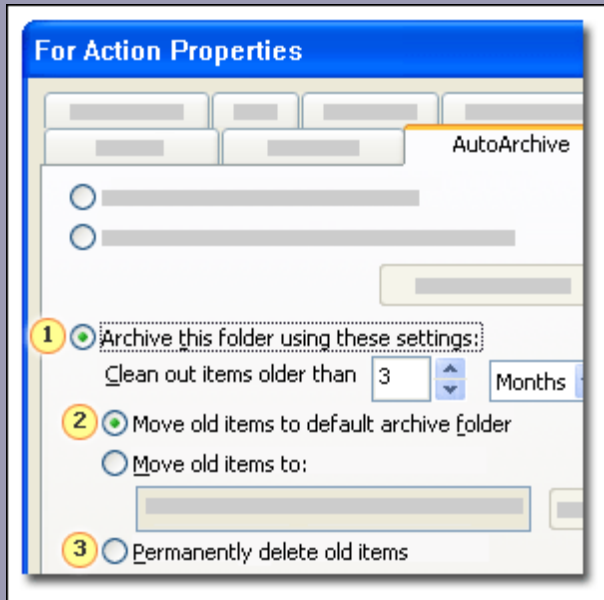
**AutoArchive** tab of the **Properties** dialog box for a folder

Next, as the picture shows:

1. Click **Archive this folder using these settings.**
2. Use these settings to specify whether to send items to a folder other than the default folder.
3. Use this setting if you want to delete items in the folder that you are customizing.

File or archive your e-mail  
on your own computer

# Choose your settings



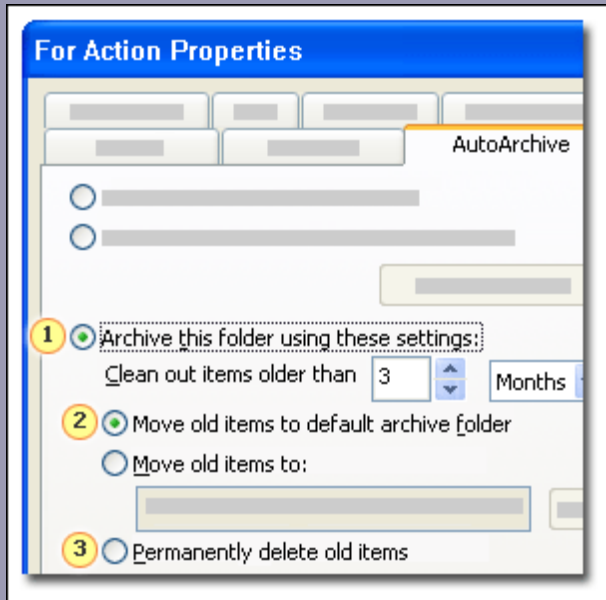
**AutoArchive** tab of the **Properties** dialog box for a folder

Once you choose these settings, AutoArchive will just happen. That's what makes it so easy.

Still, do remember to perform periodic tune-ups. As you add or remove folders, you'll want to adjust your custom AutoArchive settings to match.

File or archive your e-mail  
on your own computer

# Choose your settings



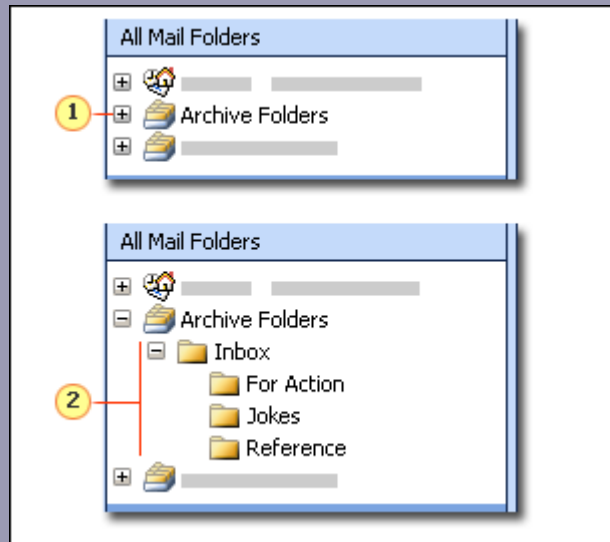
**AutoArchive** tab of the **Properties** dialog box for a folder

You may also want to adjust your settings if you get more (or less) mail for a while, join newsgroups, or otherwise change the rate of activity in the Inbox.

To test your AutoArchive settings, click **AutoArchive** in the **Mailbox Cleanup** dialog box (**Tools** menu).

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on your own computer

# Read archived messages



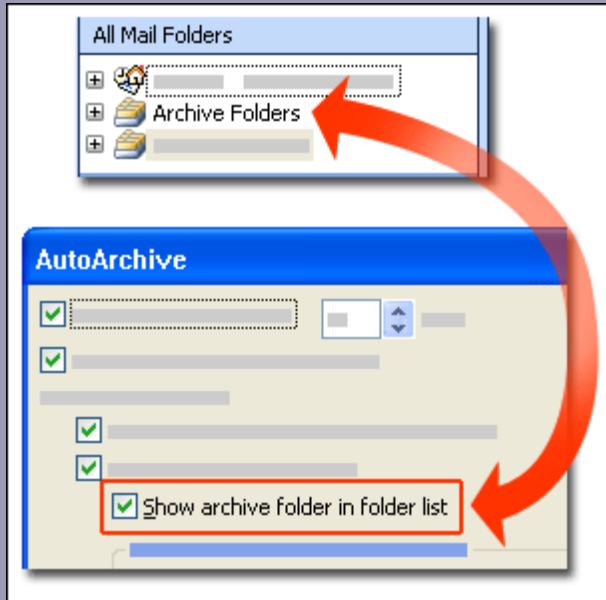
Reading archived messages

As the picture shows, you can do the following to read your archived messages:

1. Click the plus sign next to **Archive Folders** in the **Folder List**.
2. The list of your archived folders appears in Archive Folders. Click a subfolder to read the messages.

File or archive your e-mail  
on your own computer

# Or, don't read archived messages



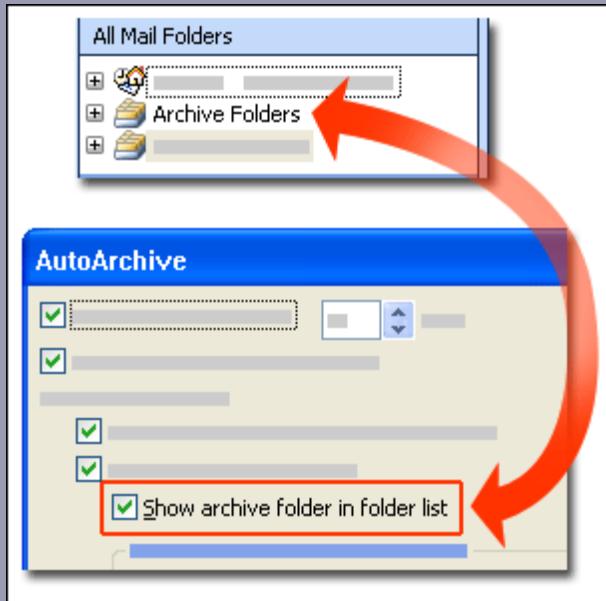
Maybe you don't want to read your archived messages. In that case, you may not want to see Archive Folders in your Folder List, either.

To stop seeing it, right-click **Archive Folders** as shown in the top image, and then click **Close** on the shortcut menu.

Hiding **Archive Folders**

File or archive your e-mail  
on your own computer

# Or, don't read archived messages



Hiding **Archive Folders**

To make sure that **Archive Folders** doesn't reappear whenever AutoArchive runs, clear the **Show archive folder in folder list** check box in the **AutoArchive** dialog box.

You can do that when the dialog box next appears, or by opening that dialog box as described earlier.

File or archive your e-mail  
on your own computer

# What AutoArchives, and when



Messages move to an archive folder when they achieve maturity.

"Maturity" doesn't mean self-control or emotional balance here. It means how long a message sits around without your touching it. Maturity is based on the last modified date.

When messages reach maturity, they move to an archive folder.

File or archive your e-mail  
on your own computer

# What AutoArchives, and when



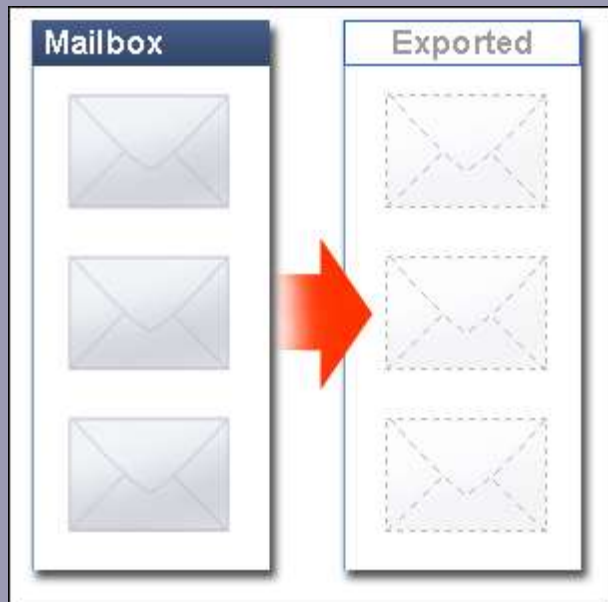
These actions change the modified date (and time) of a message:

- Forwarding, replying, and replying to all
- Editing and saving
- Moving and copying

When messages reach maturity, they move to an archive folder.

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# Archive isn't export



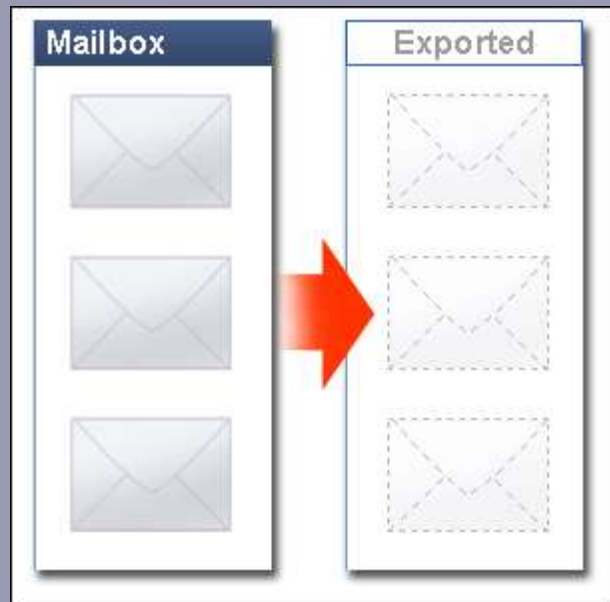
Exporting messages creates a copy in the exported file.

You may be familiar with the process of exporting data. Be warned: In Outlook, exporting isn't like archiving.

When you export messages, they stay in their original Mailbox location *and* are duplicated in a new Exported file. So exporting messages doubles their number and required space.

File or archive your e-mail  
on your own computer

# Archive isn't export



**Export** when you want to copy messages—for example, if you want to use them in another program such as Microsoft Office Excel.

**Archive** when you want to move messages from one place to another in Outlook.

Exporting messages creates a copy in the exported file.

File or archive your e-mail  
on your own computer

# Suggestions for practice

1. Review AutoArchive settings.
2. See where to customize settings for a folder.
3. See where to run AutoArchive manually.

[Online practice](#) (requires Outlook 2003)

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# Test 2, question 1

**How do you read archived messages? (Pick one answer.)**

1. Open **Archive Folders** in the **Folder List** by clicking the plus sign next to the folder.
2. Click **Archive** on the **File** menu.
3. Click **AutoArchive** in the **Mailbox Cleanup** dialog box.

# Test 2, question 1: Answer

Open **Archive Folders** in the **Folder List** by clicking the plus sign next to the folder.

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# Test 2, question 2

**Outlook determines whether to archive a message based on which property? (Pick one answer.)**

1. Creation date.
2. Last modified date.
3. The date the message was received.

# Test 2, question 2: Answer

Last modified date.

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on your own computer

# Test 2, question 3

**When you export messages from Outlook, what is the result? (Pick one answer.)**

1. Messages are moved to Archive Folders.
2. Messages are removed from the Mailbox and placed in the export file.
3. Messages are copied to the export file, and they remain in the Mailbox.

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# Test 2, question 3: Answer

Messages are copied to the export file, and they remain in the Mailbox.

File or archive your e-mail  
on your own computer

# Lesson 3

## **Get personal with Personal Folders**

# Get personal with Personal Folders



Filing e-mail in a personal folder gives you maximum control over how and where your stuff is stored.

With personal folders, you set up the folders and move messages manually, exactly the way you want them.

Take the personal folders route.

File or archive your e-mail  
on your own computer

# Design your filing system



With personal folders, you design the filing system.

Does this sound like you?

- You like an empty **Inbox**.
- You like to file mail as soon as you finish reading it.
- You like to group messages by project, topic, or other major category.
- You enjoy devising filing systems.

File or archive your e-mail  
on your own computer

# Design your filing system



With personal folders, you design the filing system.

Does this sound like you?

- You naturally think to update your filing system, for example when old projects are completed and new ones start.
- You create rules to move messages to specified locations.

If so, you'll really enjoy the control that personal folders give you.

File or archive your e-mail  
on your own computer

# Design your filing system



With personal folders, you design the filing system.

You can combine folders that are separate in your Mailbox, or you can split Mailbox folders, depending on your long-term needs for these filed messages.

With personal folders, you design the filing system.

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on your own computer

# Design your filing system



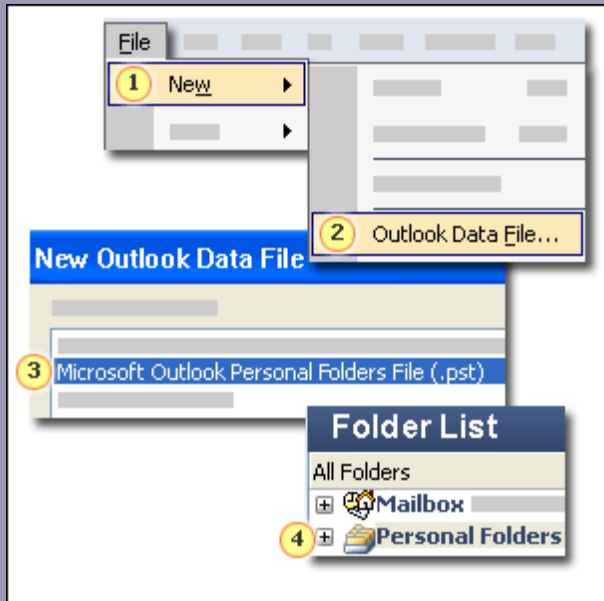
With personal folders, you design the filing system.

The picture illustrates how you name all the folders inside **Personal Folders**.

The **Inbox** contains a **Jokes** folder for all incoming jokes. After reading them, you could move the keeper jokes to **Personal Folders**, placing them in one of two folders: **Old Jokes (Bad)** or **Old Jokes (Good)**.

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# Create your filing system



The **Personal Folders** file in the **Folder List**

To create your personal folders:

1. On the **File** menu, click **New**.

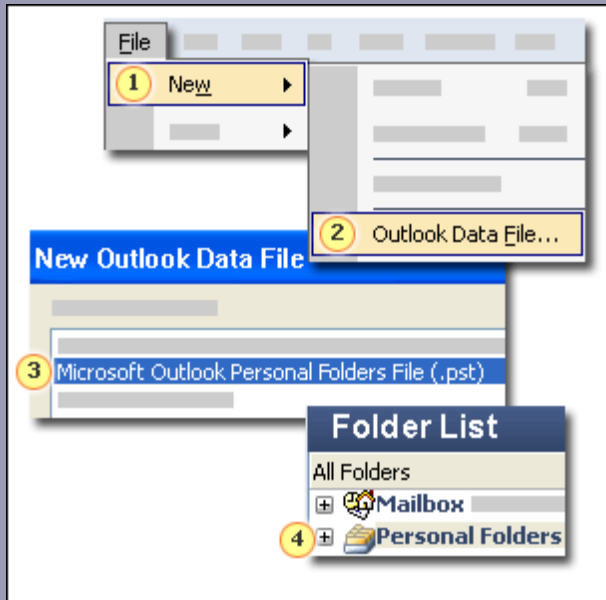
2. Select **Outlook Data File**.

3. Select **Microsoft Outlook Personal Folders File (.pst)**.

4. Now **Personal Folders** appears in the **Folder List**.

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# Create your filing system



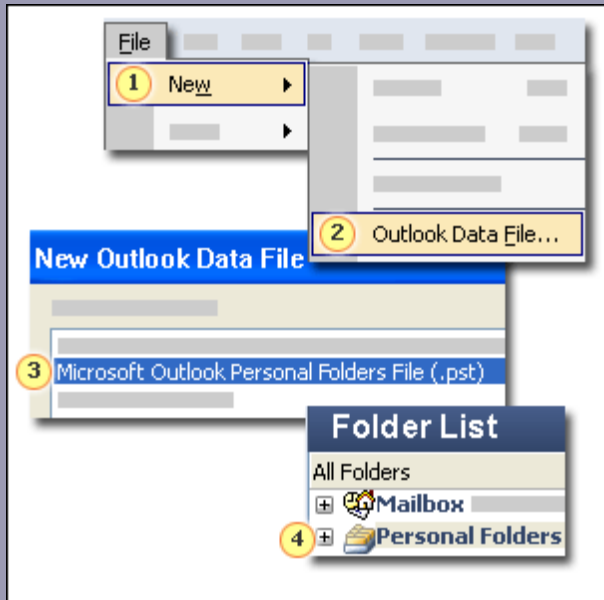
The **Personal Folders** file in the **Folder List**

Once you create Personal Folders, it's a good idea to create some folders inside it—you're doing this because you want to get organized, right?

For example, a folder named **Temporary** can be a useful place to put messages you need to keep but don't expect to keep for long.

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# Create your filing system



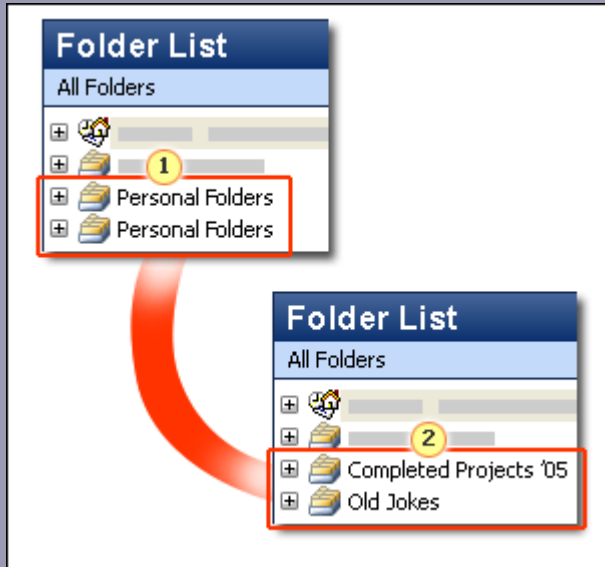
The **Personal Folders** file in the **Folder List**

After you've got your filing system worked out, you can start moving messages by:

- Right-clicking them and then clicking **Move** (this is the only way to move a message while it's open for viewing).
- Dragging.
- Creating rules to move them automatically.

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# Split Personal Folders



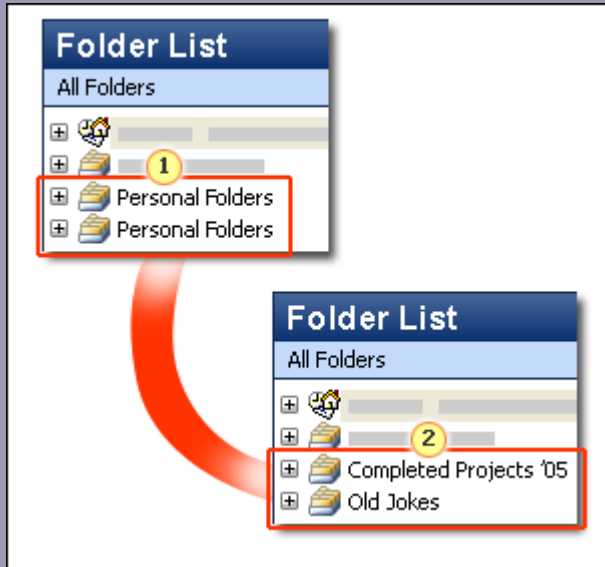
There are times when you might want to have two separate sets of personal folders.

For example, you might create one top-level folder for messages about a specific project, while another top-level folder stores non-business mail.

Renaming these folders makes it easier to tell them apart.

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# Split Personal Folders



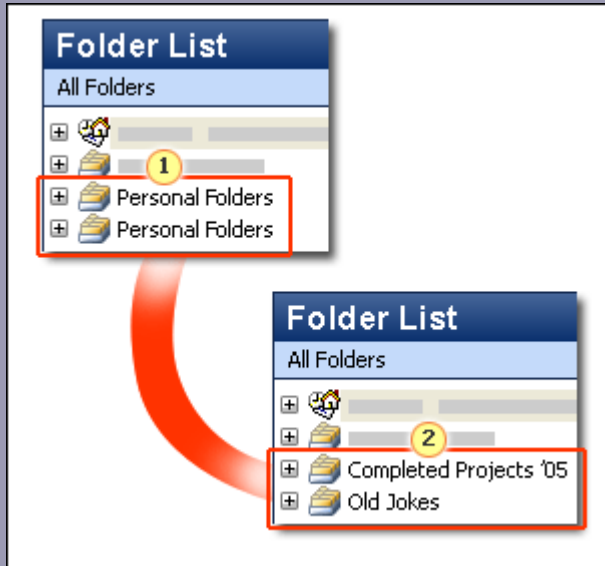
But whenever you add a new set of personal folders, the default top-level folder name is **Personal Folders**.

How original. It's like naming your cat, "Cat." And worse, it's confusing.

Renaming these folders makes it easier to tell them apart.

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# Split Personal Folders



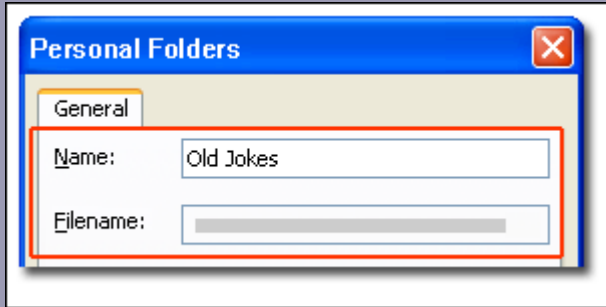
Renaming these folders makes it easier to tell them apart.

The solution? Your common sense and creativity. As the picture shows:

1. Take the hard-to-distinguish folders called **Personal Folders**...
2. ...and change the folder names to something meaningful. Your personal folders get personal names.

File or archive your e-mail  
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# What's in a name?



Change a folder's name by changing its settings.

To change the name of a folder from **Personal Folders** to something more personal, use the **Outlook Data Files** dialog box.

To open it, click **Data File Management** in the Navigation Pane for **Folder List**.

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# Suggestions for practice

1. Create the **Personal Folders** file.
2. Create and name a folder inside **Personal Folders**.
3. Move a message to the personal folder.

(Continued on next slide.)

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# Suggestions for practice, cont'd.

4. Create a second **Personal Folders** folder.
5. Change the names of the **Personal Folders** folders.
6. Create a password for personal folders
7. Remove the practice personal folders.

[Online practice](#) (requires Outlook 2003)

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# Test 3, question 1

**Why would you want to change the name Personal Folders to something else? (Pick one answer.)**

1. Because you are using **Personal Folders** only for business e-mail.
2. You have two or more **Personal Folders** folders.
3. So that Outlook won't overwrite your data.

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# Test 3, question 1: Answer

You have two or more **Personal Folders** folders.

It helps you to tell them apart if they have different names.

File or archive your e-mail  
on your own computer

# Test 3, question 2

**Which of the following arrangements is possible with Personal Folders, but not with Archive Folders? (Pick one answer.)**

1. You can rename **Personal Folders** in the **Folder List**.
2. You can hide the file from view in the Navigation Pane.
3. You could have more subfolders than you do in the Mailbox.

File or archive your e-mail  
on your own computer

# Test 3, question 2: Answer

You could have more subfolders than you do in the Mailbox.

You create the **Personal Folders** subfolders, so you can have as many as you like. The subfolders in **Archive Folders**, on the other hand, mirror the Mailbox.

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