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How to Stay Within Your Outlook Quota And Keep All the Messages You Need

Microsoft Outlook Mailbox Management Techniques

Education/Training Programs

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Outlook Quota

What is the Outlook Quota?

This pamphlet is designed to provide you with the necessary steps that you will need to take to prevent exceeding the quota and disabling your Outlook mailbox.

At HSC, the Outlook quota applies to the Outlook items such as messages, attachments, appointments, tasks, etc. that are in your mailbox on the Exchange Server. The quota does not apply to any personal folders or archive folders that reside on your individual PC.

The standard size limit at HSC for your Outlook mailbox is 250MB. This will generally be more than sufficient for the users at HSC. However, if you should approach the quota, you will receive warning messages from the system, and you will need to do some mailbox management.

Checking the Size of Your Mailbox

To check the current size of your Mailbox, open Outlook, click the Tools Menu and choose Mailbox Cleanup. Click the "View Mailbox Size" button. In the Server Data area, you will see the total size of your mailbox. You will also see a listing of the folders within your mailbox along with the size of the individual folders.

The size is listed in kilobytes. 1000 Kb is 1 Mb. 15000 Kb is 15 Mb.

Using this information will allow you to make an informed decision as to when you need to perform mailbox maintenance.

- Under Step 1 click "Move messages from someone to a folder".
- Under Step 2 click from "people or distribution list"
- Choose the name of the person or distribution list from the global address book, or click on the down arrow and choose from your contacts. Click the name to select it.
- Click on the "From" button at the bottom of the screen and the name will appear.
- Click OK.
- In the "Move it to the" click "specified" folder. Choose the folder you wish to save the messages in, or create a new folder.
- If the folder name is listed under "Mailbox-Username" the rule will be server based. If is listed below the "Personal Folders" entry, it will be a client-only rule.

Create as many rules as necessary for managing your mailbox. Using the Rules feature provides ongoing mailbox maintenance, and if used efficiently, archiving will not be necessary. Rules run in the order that they are listed.

Backup

After choosing your preferred method of mailbox maintenance you will want to be sure that your needed items are backed up regularly. If you stay within your quota by simply deleting unnecessary items and leave everything else on the server the back-up is performed at the server level. If you create archives or store mail folders on your local computer, you will be required to perform your own backups. The easiest method is to simply drag and drop copies of your folders onto floppy disks, zip disks or CDs. Be sure to store your backups in a safe place.

Rules

Rules help you manage your email messages by performing actions on messages that match a specific set of conditions. After you create a rule, Outlook applies the rule when a message arrives in your Inbox.

Server Based vs. Client Only Rules

With the Exchange Server, the server can apply rules to your messages even if you don't have Outlook running. These rules are called server-based rules. The rules must be set to be applied to messages when they are received in the Inbox on the server, and the rules must be able to run to completion on the server. For example, if you set a rule to move messages into folders that are located under your Personal Folders, that rule cannot be completed at the server level, because the Personal Folders reside on your local computer.

A rule that can't be completed on the server has the words "client only" added to the end of the name of the rule. Client-only rules are applied after all other rules. If your list of rules contains both types of rules, the server based rules will be applied first. The client only rules will be run when you login to the server from your local computer. To automatically have messages moved to your local computer you will create client-only rules.

Example:

Create a rule that will move all messages from a particular person into a folder on your computer;

- Open the Tools menu and choose "Rules and Alerts".
- Click "New Rule" and the Rules Wizard dialog box will appear.
- Choose "Start Creating a rule from a template".

Manual Mailbox Cleanup

The manual mailbox cleanup provides the greatest flexibility in staying within your quota. The process involves moving mail from the Exchange Server onto your personal PC.

Open Outlook. The Navigation window will appear on the left side of your screen. The folders listed directly below the Mailbox—Username are stored on the Exchange Server. If you look down the listing and you find Personal Folders or Archive Folders, any folders listed below them are housed on your PC.

Open one of the folders housed on the Exchange Server and you will see the messages that reside in that folder. Click on a message to select it, then drag and drop it into a folder listed below the Personal Folders entry.

You can add folders under the Personal Folders entry by right clicking on the Personal Folders and choosing New Folder.

Once you move the messages from the Exchange Server down to the Personal Folders, they will only be available on the PC in which they reside, thereby freeing up space on the Exchange Server.

Make a backup of the folders listed in your Personal Folders by copying them onto a floppy disk, or burn them onto a CD. This will insure that you have a copy in the event that your hard drive should fail or if your system becomes corrupted.

Archive

Outlook's Archive feature moves groups of files based on the "modified date" from your Outlook Mailbox to an archive file on your local hard drive. This feature is designed for files which you do not use regularly, but that you do not want to delete and may need for the future. Some benefits of archiving include:

- Contents of archive files do not count against your Outlook quota.
- You can add to the archive file.
- Your existing folder structure is automatically maintained in your archive file.
- Archived items are only available to you in Outlook on the PC that you use to run the archive.
- You can archive manually any time you wish. (see *directions below*)
- You can set AutoArchive to archive automatically at timed intervals. (*directions next page*)

Manual Archive

Manual archiving allows you to choose when and what you want to archive. To manually archive your Outlook mailbox:

- Open Outlook.
- Click the File Menu and choose Archive.
- At the top of the window there are two radio buttons. Click "Archive this folder and all subfolders" option.
- Choose the item labeled "Mailbox—User Name" by clicking on it once. This means that all the mail, contacts, calendar items, tasks, notes, etc. that you have stored in your folders as well as your Sent Items folder will be archived.
- Choose whether or not you wish to archive items marked "Do Not AutoArchive".
- Choose where you wish to store the archive file on your PC. (*default setting is best*)

AutoArchive

Setting AutoArchive is another way to maintain your mailbox. Prior to configuring AutoArchive you should mark any folders that you wish to include in this process. To accomplish this, right click on the folder you wish to include in the AutoArchive and choose Properties. Click the AutoArchive tab and click the radio button for "Archive Items in this folder using the default settings". If you change your mind in the future, you can always go back and turn this setting off.

To configure AutoArchive;

- Click the Tools menu and choose Options.
- Select the "Other" tab and click the AutoArchive button.
- Click the box beside "Run AutoArchive every ____" and set the number of days between the archiving process. The default is 14 days.
- Choose whether or not to have AutoArchive prompt you before running.
- In the During AutoArchive, click the box beside "Archive or delete old items" and set the age of the items you wish to archive and delete. The default setting is 6 months.
- Click the "Move Old Items to" radio button. If you choose the default, you will not have to remember where you stored the archive.pst file.
- Click "Apply these settings to all folders now" and click OK.

The Archive folder will be listed in the folder listing of Outlook. If you open the Archive folder you will notice that the folder hierarchy has been created for you based on the same settings as the folders on the Exchange Server.

Each time AutoArchive runs, it adds the items into the appropriate folders within the Archive folder.