

Archiving and Disk Quota in Outlook - June 27, 2013

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Introduction

Every Outlook user and resource at TRU is given two locations to store email: a mailbox where current messages are stored and an online archive to store older messages that you do not need to refer to as frequently. By moving messages into the online archive you can speed up your live mailbox as Outlook doesn't have to deal with as many messages and folders. In addition it is a good way to reduce your Outlook disk quota as you are allocated more space in your online archive than your mailbox.

Online Outlook archives are managed and backed up by IT Services just like your mailbox. You can search and access messages in your online archive both with the Outlook client and from Outlook web access (<http://exwebmail.tru.ca>).

Video on Online Archives and how to use them: http://www.youtube.com/watch?v=HWt_lidQwZE

Important Note: Mac Outlook 2011 Users

The Mac Outlook 2011 Outlook Client **does not support online archives**. If you setup archive policies or use the Windows Outlook Client or Outlook Web Access to move messages into your online archive you will not be able to view or search them using the Mac Outlook 2011 Client.

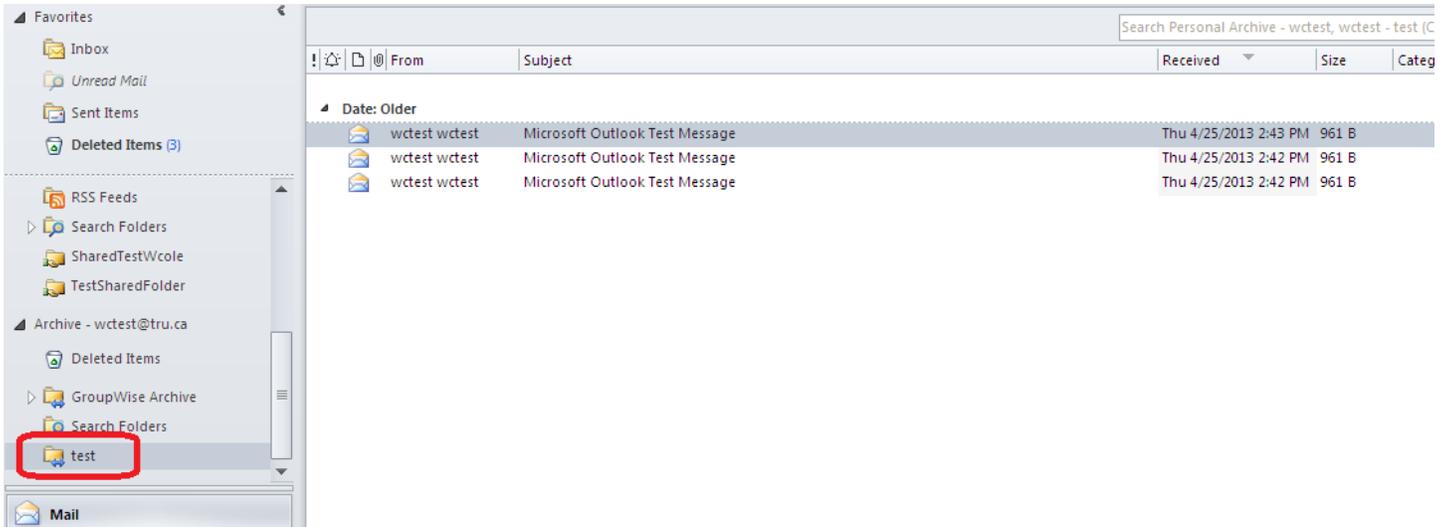
Important Note: Resources Owners

If you setup archive policies on a resource only those users who have "Full Access Permissions" to the resource and have added the resource as an account to the Windows Outlook Profile will be able view or search the resource's archive. Other users who only have rights to shared folders or delegate access will **not be able to view or search the resource's archive**.

Using the Archive

You can use your Outlook online archive just like you use your mailbox. You can create folders in it and drag and drop messages into them or drag and drop entire folders from your mailbox into your archive. For example this user dragged the folder "test" into their archive.

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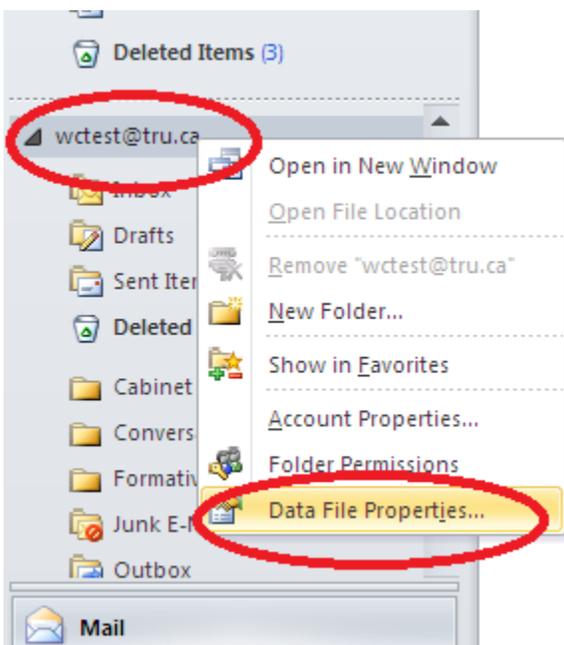


Using an Archive Policy

Outlook also allows you to setup an archive policy on your entire mailbox or on individual folders within your mailbox.

Setting an Archive Policy on your Entire Mailbox

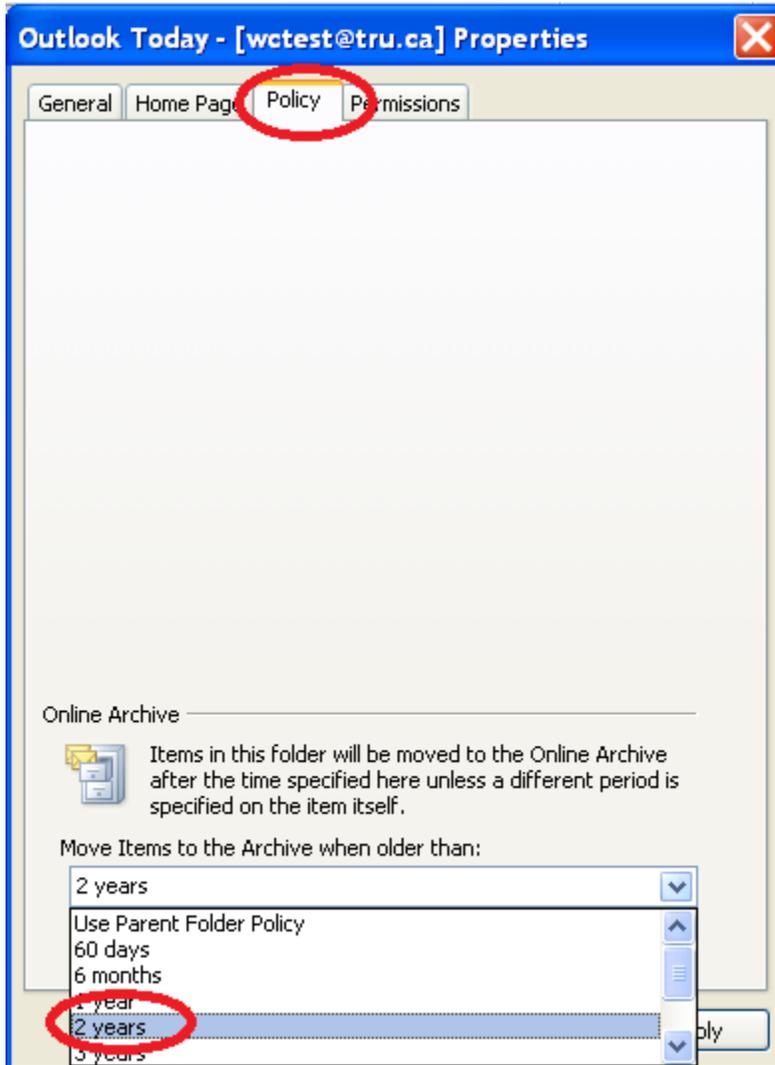
To set an archive policy on your entire mailbox, right click on your username@tru.ca in the navigation pane on the left and select "Data File Properties".



In the properties of your mailbox select the "Policy" tab and in "Move Items to the Archive when older than:" select a time period from the drop down menu and select OK. Time periods include

"Use Parent Folder Policy", "60 days", "6 months", "1 year", "2 years", "3 years", "4 years", "5 years", and "Never".

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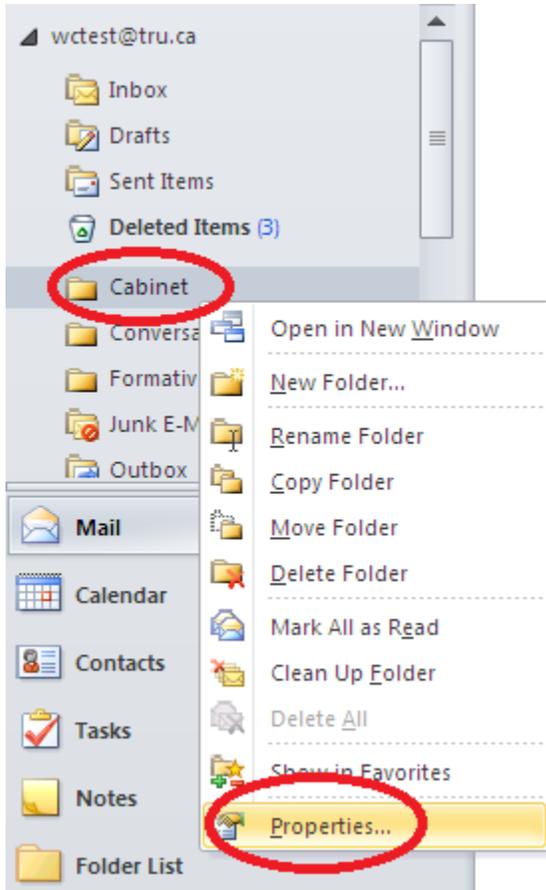
Once a policy has been set Outlook will gradually move emails, appointments, tasks, etc. to the online archive that are older than the specified period. **This process usually happens with a couple of days but can take up to a week to complete.**

Setting an Archive Policy on a Folder and its Subfolders

All folders by default have "Use Parent Folder Policy" set. This means that they inherit the policy set on the parent folder which is why setting a policy at the top level sets policy for your entire mailbox.

However, you can break this inheritance rule by setting a different policy on a folder (and by inheritance all of its subfolders) anywhere in your folder structure. To do this, right click on the folder and select "properties"

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In the folder properties select the policy tab and from the drop down list select an archive policy. If you select “Never” the archive policy will never be applied to the folder or any subfolders. In this case you’ve broken inheritance of the archive policy.

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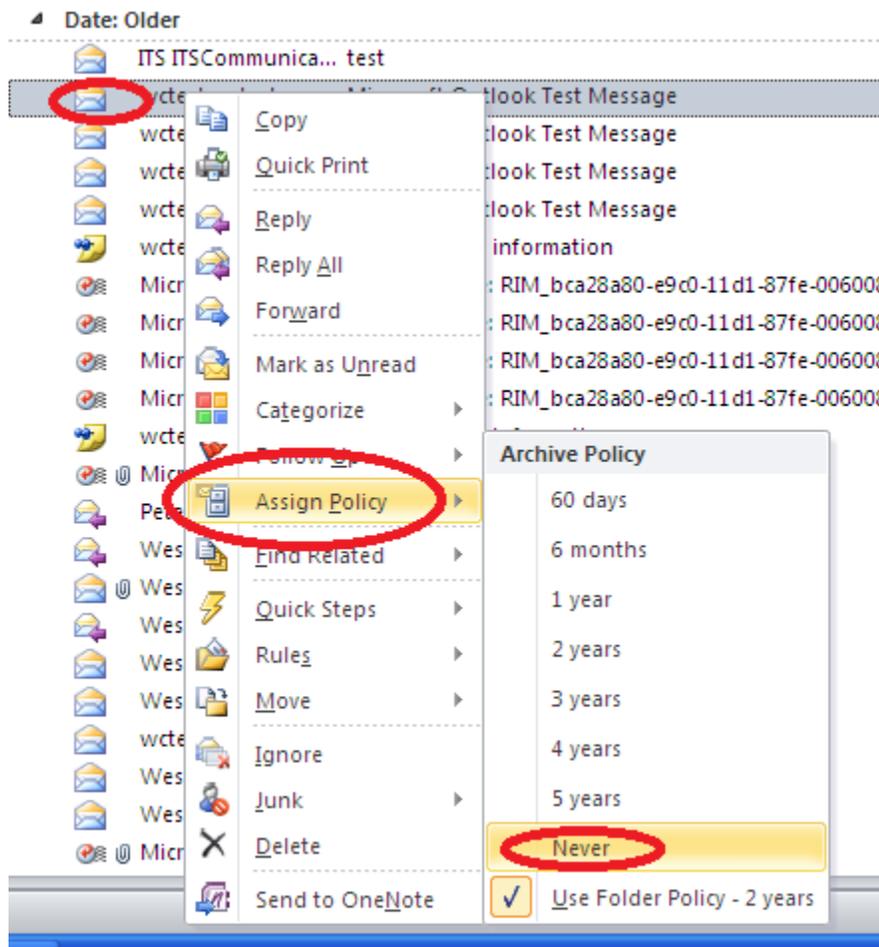


Setting an Archive Policy on Individual Messages in a folder

If you want to keep specific messages in your mailbox and not have them moved to your online archive you can set a policy on individual messages.

To do this, right click on the message/messages and select "Assign Policy" and then pick an archive policy. If you select "Never" the message will never be moved to your archive by the archive policy.

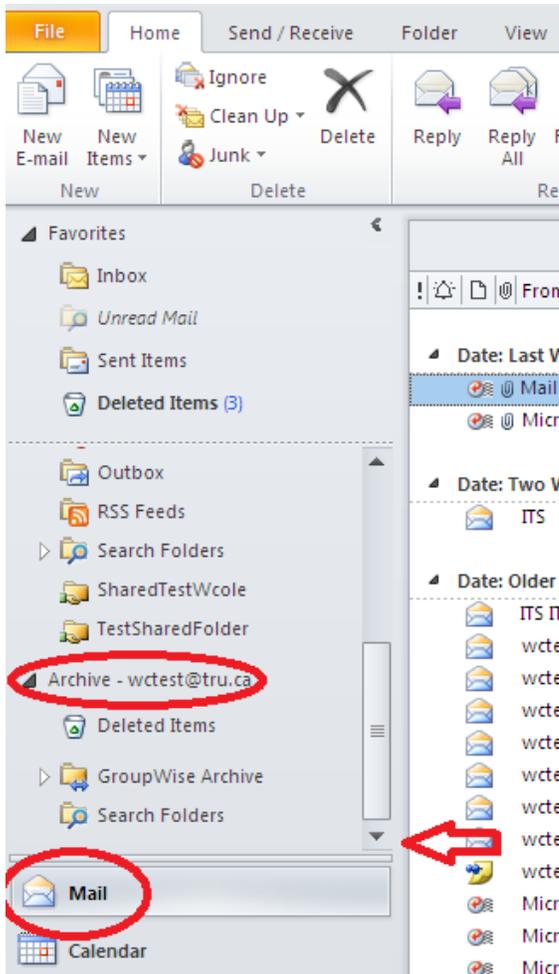
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Locating the Outlook Archived email

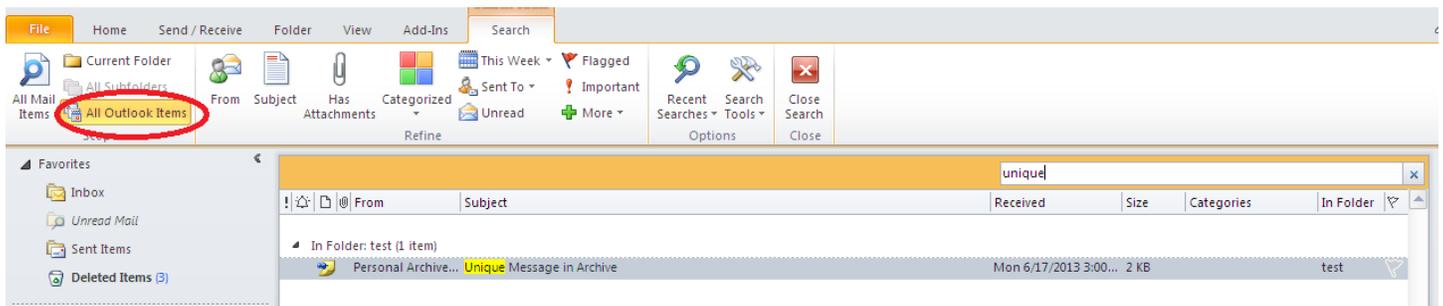
To find your online archive in Outlook look in the navigation pane and pull the slider bar down to the bottom. You should see "Archive – username@tru.ca" with a small arrow beside it. Click on the arrow to expand the view of the folders inside your online archive.

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Searching your Online Archive

As long as you expand your search to include “All Outlook Items” your online archive will be searched as well as your mailbox.



Resource Archives

All resources accounts at TRU also have online archives. However, only Owners with “Full Access Permission” who have added the resources as an account to Outlook can access and search the archive.

Resource archives are also located in the Navigation pane of Outlook once the resource has been added as an “account”.

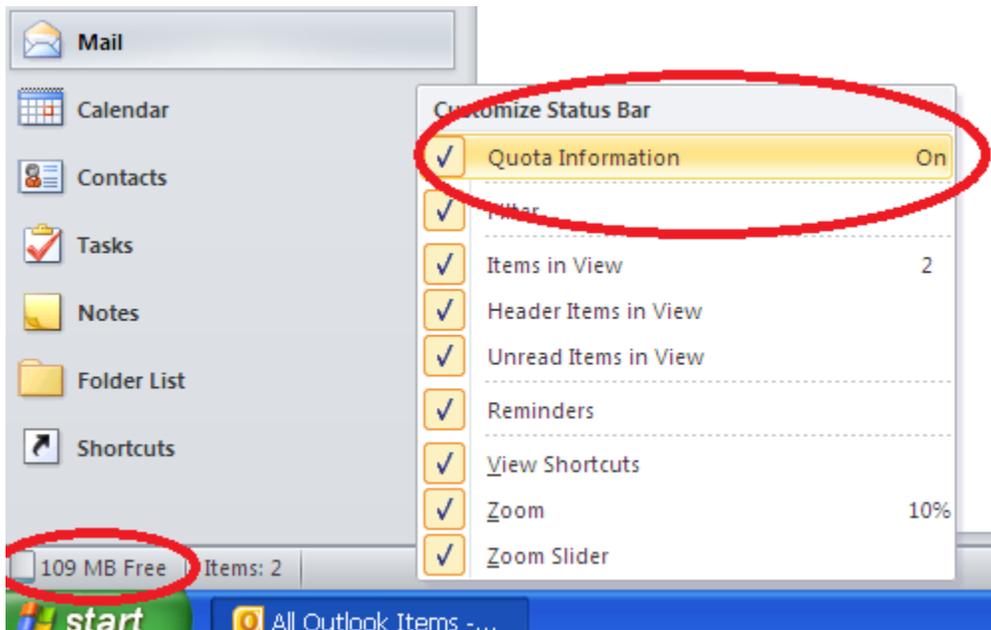
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Disk Quotas

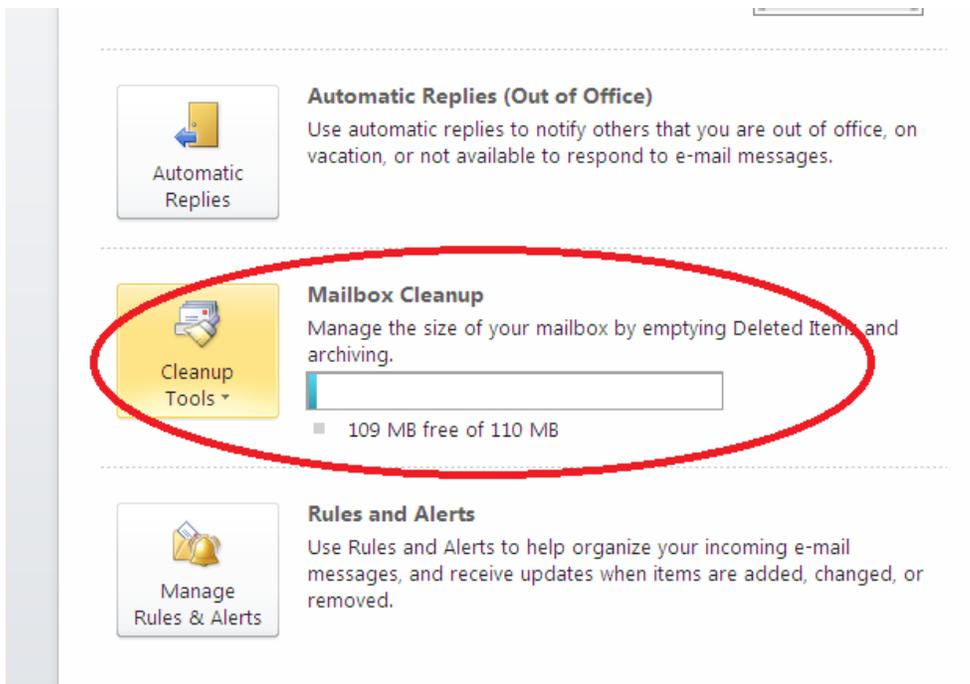
All users and resources in Outlook will be assigned a disk quota in July of 2013. Quotas will be assigned based on the current disk usage of each account. Online archives will not be assigned quotas until September of 2013.

Once quotas have been assigned you can see how much space you have used by right clicking on the status bar in Outlook and selecting "Quota Information On". This will show you how much disk space you have free.

Mail messages stored in your online archive do not count against your mailbox quota.

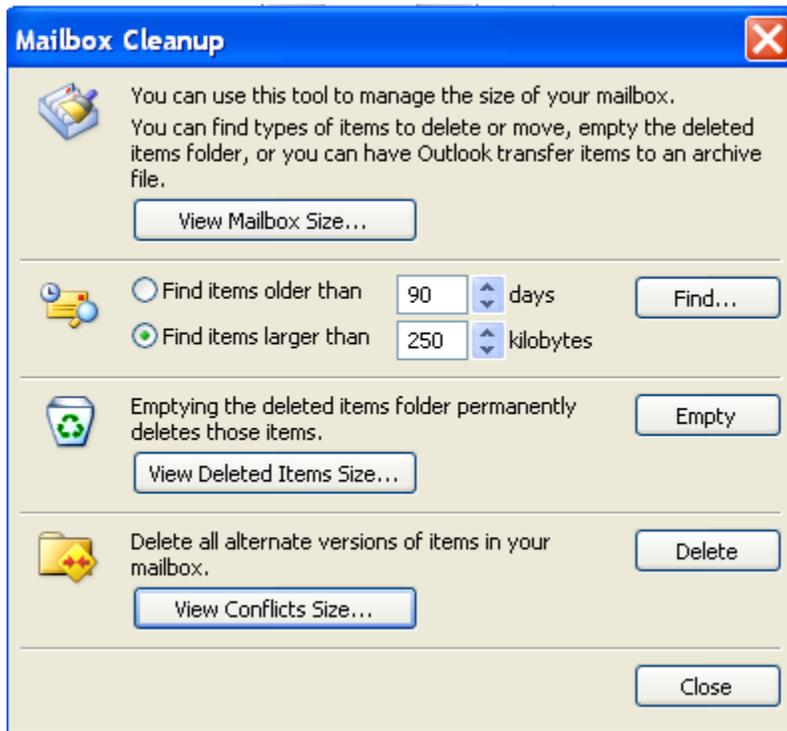


You can also view quota information by clicking on "File" and checking out "Mailbox Cleanup"



Various options are available in Mailbox Cleanup to help you reduce your mailbox size

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Outlook Archives using Webmail

Archives can also be set on individual Folders in Webmail – Right click on the Folder and select Archive Policy and then select the option to meet your requirements.

