Microsoft® Office 2000

Managing Your Microsoft® Outlook® Information

White Paper

Table of Contents

Managing Your Microsoft Outlook Information

White Paper

Published: March 1999

Introduction

The Microsoft® Outlook® messaging and collaboration client lets you use folders to store a wide variety of data items, from e-mail and appointments to contacts and sticky notes. As you use Outlook you may find that you want more sophisticated tools to manage your Outlook information. The purpose of this white paper is to explain the various data file management features in Outlook, and to recommend the best solutions to accomplish your goals.

This paper will provide you with an understanding of how you can manage your folders using the following methods:

•   Backing up your data for safe storage

•   Cleaning old items out of the folders you use every day, without losing information

•   Keeping information on two computers in sync

•   Sharing information with other users

Outlook Data files

The Outlook data file is the file that contains all of your personal Outlook folders: Inbox, Calendar, Contacts, etc. Depending on your configuration, Outlook will use one of three types of file:

•   **Personal Folders file (.PST file)**. The PST is a general-purpose file that resides locally on the user's computer. All users without a Microsoft Exchange Server keep their Outlook folders in a PST.

•   **Exchange Server Messaging Store (EMS).** The EMS is a "file" that resides on a central Exchange Server. EMS users log into the server and access their information over the network. (Exchange Server users also have access to **Public Folders** that they can use to store shared information.)

•   **Exchange Server Offline Folder file (.OST file).** When Exchange Server users need to work with their Outlook information while not connected to the server (on a laptop, for example), they can keep a local

copy of their information in an OST file and synchronize it with the server. When the user connects to the server, any changes made in the OST will be uploaded to the server, and vice versa.

Users of Outlook can have several data files open at once. For example, Exchange Server users might have their EMS open, but also have PSTs open that they use to store old data that has been archived. You can view all of the data files that you currently have open in the Folder List:
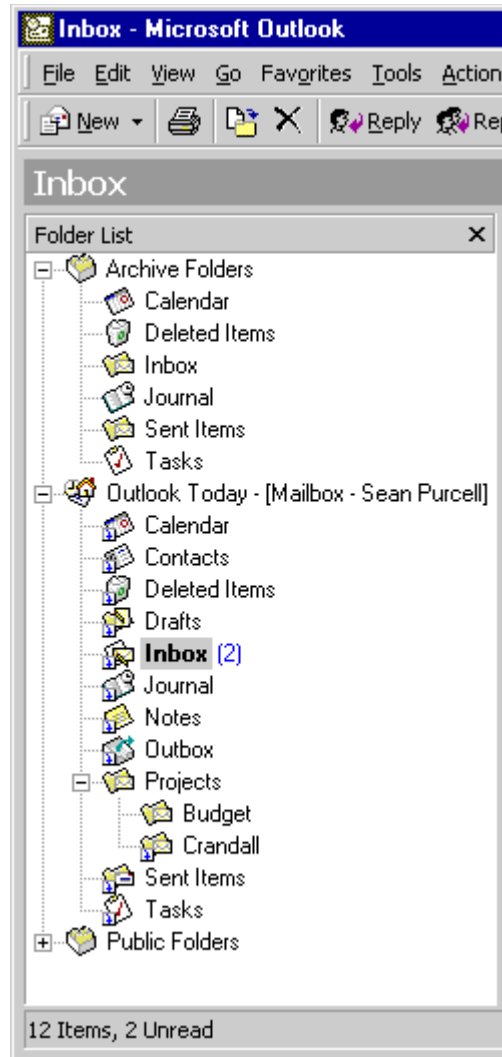

Figure 1. The folder list (choose Folder List from the View menu) shows the data files that are currently open. This illustration shows two data files (the "Archive Folders" PST and the EMS mailbox) that a typical Exchange Server user might see.

Backup

Keeping copies of your information is very important. It will assure that if for some reason you should lose or delete information you have a copy you can go back to find that information. Outlook provides you with ways to back up your Personal folders and your Exchange folders.

Backing Up Your Personal Folder File (PST)

Using the Personal Folder Backup Add-in

The Personal Folder Backup add-in makes it easy to backup your PST files. You can choose which PST files you want to backup, where you want to save your backup files, and how often you want to be reminded to back up. Outlook takes care of the rest.
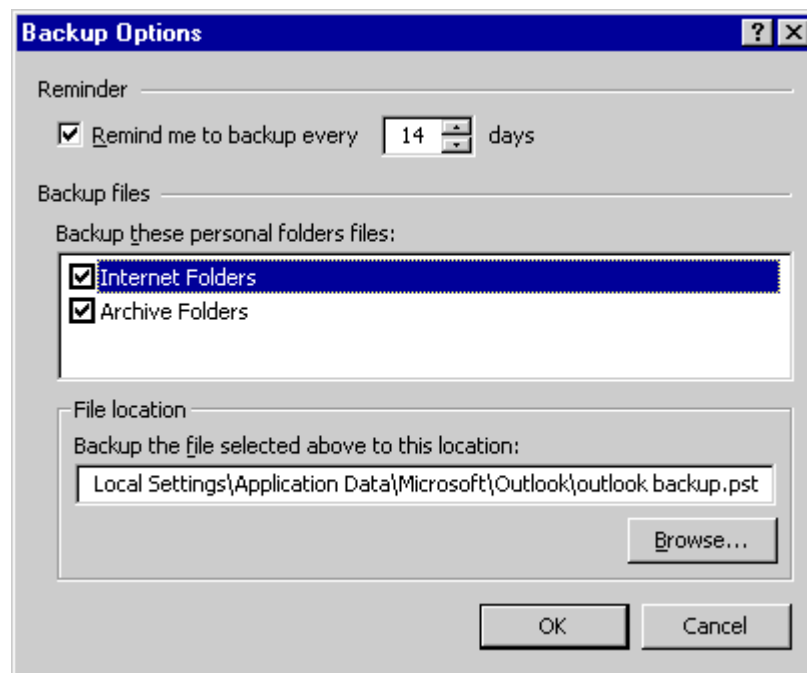
Figure 2. The Personal Folder Backup Options dialog box (File|Backup|Options) lets you choose what, where, and when to back up.

The Personal Folder Backup copies the PST file directly to a backup location—there is no separate backup file format.

Note Personal Folder Backup is currently in its beta phase. It will not ship with Outlook 2000, but will be available for download on the Microsoft Outlook Web site (*http://microsoft.com/outlook*) soon after Outlook 2000 is released.

Backing Up Your Outlook Data File (PST) Without Personal Folder Backup

If you need to back up a PST file and you don't have the Personal Folder Backup add-in, you can back it up just as you would any other file on your computer. At regular intervals, simply use the Windows® Explorer (or any backup program) to copy your PST file to a backup location. This is generally the fastest way to back up your Outlook data.

By default, your PST file is named Outlook.pst and is stored in Outlook's Local Settings directory (for example, C:*Windows*\\profiles*username*\\Local Settings\\ Application Data\\Microsoft\\Outlook\\ on multi-user computers, or C:*Windows*\\ Local Settings\\Application Data\\Microsoft\\Outlook\\ on single-user computers). You can always find out the name and location of any PST file by right-clicking on its [root folder](#) in the Folder List, choosing Properties, and then going to the Advanced tab.

You must exit Outlook before you can copy or otherwise access a PST file.

Backing Up Your Outlook Data File (EMS)

If your information is on an Exchange Server, your data is most likely being automatically backed up by the server administrator. If you still want a local copy of your data, you can always keep synchronized copies of your important Exchange Server folders on a local OST. If you want to write out a copy of your entire EMS to a PST file, you can use the Export feature to export copies of your [root folder](#) and all of its subfolders.

Note If your Exchange Server data is ever lost and has not been backed up by your server administrator, but you still have a copy of it in your local OST file, do not synchronize with your Exchange Server. If you do this, your local data will be removed in the synchronization process. In order to restore your data, you will need to start Outlook offline (working from your OST), Export your data into a PST, and then Import the data from the PST back into your Exchange Server folders.

Backing Up Individual Folders

If you only want to back up certain folders, you can copy them to a backup PST using the Export feature. This method will generally take longer than simply backing up your entire PST file, but by only choosing certain folders, your backup file will be much smaller (which can be especially useful if you need to back up your data to a floppy disk). This method also lets you filter the items that you export; for example, you can choose to export only items that have been modified within the past week.

From the File menu, choose the Import and Export command. In the Import and Export Wizard, choose "Export to a file," then in the next screen choose to export to a "Personal Folder File (.pst)". In the next screen, you can choose which folder/subfolders to export, and which PST to export them to.
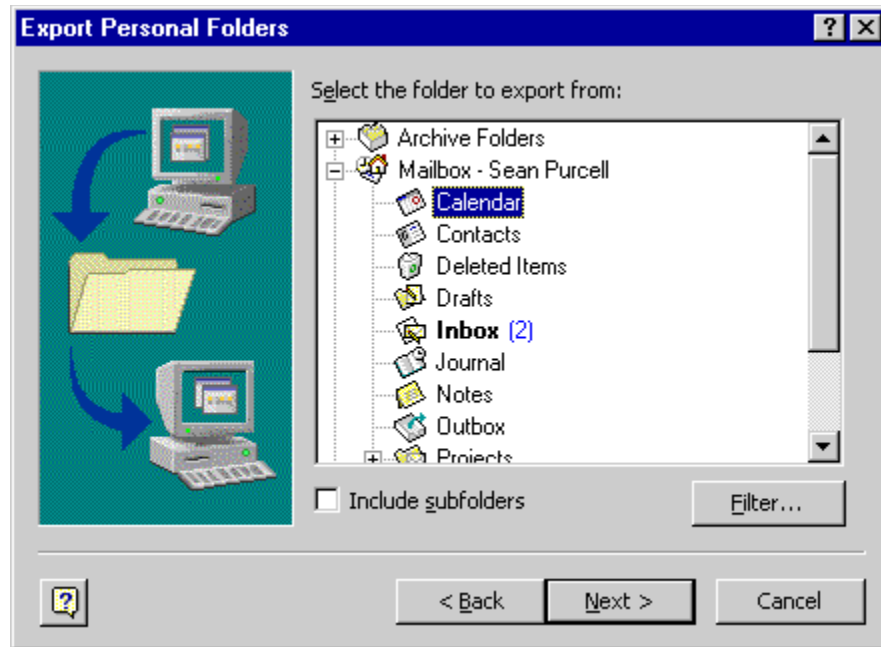
Figure 3. The Export feature lets you copy folders to a backup PST.

When an item is exported into another PST, Outlook is actually exporting a copy of that item. (The same is true when an item is imported.) Each Outlook item has a unique EntryID that identifies it—when a copy of an item is made, that copy has a different EntryID. The Contact Activity Tracking feature make use of the EntryID to link one item to another, and when this EntryID changes, the link between the two items will break.

Restoring Backup Files

Depending on how much information you wish to recover, there are three ways to restore your backup data.

Recover a few items. If you simply need to recover a few items that have been accidentally deleted or changed, you can do the following:

1. Open your backup file. On the File menu, point to Open, then select Personal Folders File (.pst). Find your backup PST file and click OK.

2. If it isn't already visible, show the Folder List (from the View menu, choose Folder List).

3. Find the desired items in your backup file, and either move or copy them into your original folders.

4. Close your backup file (right-click on the root folder and choose Close).

Recover a large number of items. If you need to recover a larger number of items, or an entire folder, you can use the Import feature (File | Import and Export) to copy items from your backup file into your original file. You can set a filter for the import, and you can choose whether or not to replace duplicate items.

Recover your entire PST. If your original PST file has been accidentally deleted, completely corrupted, or otherwise destroyed, you can replace it with your backup PST. The best way to do this is:

1. Quit Outlook.

2. Using Windows Explorer, find your damaged PST file and rename it.

3. Make a copy of your backup PST file, and give it the name of your original PST file.

4. Run Outlook. (In some cases you may need to set the newly copied PST as your default data file.)

Backing Up Your Other Outlook Settings

Listed below are additional files that Outlook uses to save user settings. These are included for the sake of completeness, but in most cases you will not need to spend the time to back up these files because they take only a few minutes to re-create. If you are moving to a new computer, however, and your settings are especially detailed, you may find it useful to copy these files to your new computer.

File	Filename	Directory†
Command Bar Customization file	Outcmd.dat	\Application Data\Microsoft\Outlook\
	If you have customized your menu and/or toolbars, the customization settings are stored in the Outcmd.dat file	
Favorites files	*Profilename*.fav	\Application Data\Microsoft\Outlook\
	Outlook records your Outlook Bar settings in a .fav file. If you have more than one Outlook profile, you will have a separate .fav file (*profilename*.fav) for each profile.	
Rules Wizard files	*Profilename*.rwz	\Application Data\Microsoft\Outlook\
	Outlook records your local Rules Wizard settings in a .rwz file. If you have more than one Outlook Profile, you will have a separate .rwz file (*Profilename*.rwz) for each profile.	
Nickname files	*Profilename*.nick	\Application Data\Microsoft\Outlook\
	This file remembers what "nicknames" you have typed in the To: line of e-mail messages and matches them to actual e-mail addresses. If you have more than one Outlook Profile, you will have a separate .nick file (*Profilename*.nick) for each profile.	
Signature files	*.rtf, *.htm, *.html, *.txt	\Application Data\Microsoft\ Signatures\
Stationery files	*.*	\Application Data\Microsoft\Stationery
Personal Address Book	*.pab	\Local Settings\Application Data\ Microsoft\Outlook

	Only users with Corporate/Workgroup support will have this file, which is usually named mailbox.pab. The PAB contains

[†] The Application Data directory is typically located in C:\Windows\Application Data on single-user computers, and in C:\Windows\Profiles*username*\Application Data on multi-user computers.

The Local Settings directory is typically located in C:\Windows\Local Settings on single-user computers, and in C:\Windows\Profiles*username*\Local Settings on multi-user computers.

Moving to a New Computer

The steps required to move to another computer depend on what type of mail support you have. (To find out what type of mail support you have, go to the Help menu and choose About Microsoft Outlook. The second line of text in the About Microsoft Outlook dialog box tells you what type of mail support you have.)

Internet Mail Only support. Users with Internet Mail Only support will need to take the following steps to move to a new computer:

1. Install Outlook on the new computer (but do not run the application yet).

2. Copy your default PST file. This file is usually named Outlook.pst, and is located in your default Outlook directory.

3. Copy any other PST files that you use.

4. Copy your Outlook settings files.

5. Run Outlook and re-create your account settings. When you run Outlook on the new computer for the first time, it will provide a wizard that will help you do this. You can look at your old account settings by choosing Accounts from the Tools menu on your old computer.

6. Open your PST files. Choose Open from the File menu to open all of the files that you copied in step 3.

Set your default PST file. If your old default file is not named Outlook.pst, then Outlook will have created a new blank Outlook.pst for you and will have set it as the default PST. You will need to set your old PST as the new default.

Corporate/Workgroup support. These users will need to take the following steps to move to a new computer:

1. Install Outlook (but do not run the application yet).

Copying your EMS file is not necessary. If you have an Exchange Server account, your EMS data is kept on the server. Do not copy your OST file—a new one will be created on your new computer.

2. Copy any PST files that you use.

3. Copy your Outlook settings files.

4. Run Outlook and re-create your profile settings (this will give you access to your EMS). When you run Outlook for the first time, a wizard will help you enter your profile settings. If you had more than one profile on your old computer, you will need to manually re-create the other profile settings on your new computer using the Mail applet in the Windows Control Panel.

No E-Mail support. Users with No E-Mail support need to take the same steps as those with Internet Mail Only support.

Moving from One Exchange Server Account to Another.

In the rare case where you need to move from one Exchange Server account to another (e.g., when your server or username changes), keeping an OST is **not** the proper way to backup your data while you switch accounts. Each OST is linked to your particular EMS file, so you will not be able to synchronize your original OST with your new EMS. In this case, you should export your entire EMS to a backup PST. If any data is lost in the subsequent move to your new Exchange Server account, you can then Import your data from the backup PST into your new EMS file.

Archiving

The longer you use Outlook, the more items accumulate in your folders. And as the number of items in your folders increases, it can take more time to perform certain operations. Finding items in a folder will be slower when there are more items to search through, and switching to your Calendar will take more time when there are more appointments to display. If you are an Exchange Server user, you might also find that you need to limit the number of items in your data file to keep your total file size under a limit set by your server administrator.

There are many good reasons to keep the size of your data file under control, and the Outlook Archive feature helps you do this.

AutoArchive

Periodically, Outlook will show the following message, reminding you to clean out the old items in your folders by running AutoArchive:

Figure 4. The AutoArchive prompt

If you agree to begin archiving, the AutoArchive feature goes through each of your folders one-by-one and searches for items that haven't been used in a long time. When it finds them, it moves these out-of-date items into an archive PST file. This cleans the old items out of your current folders, storing them away for easy reference later on.

Customizing AutoArchive

Outlook chooses default AutoArchive settings for you, but it's always a good idea to review them and make any necessary customizations before you perform your first AutoArchive.

Global settings. To control how often to AutoArchive and what file to AutoArchive to, you can go to the AutoArchive options dialog box (Tools | Options | Other | AutoArchive).
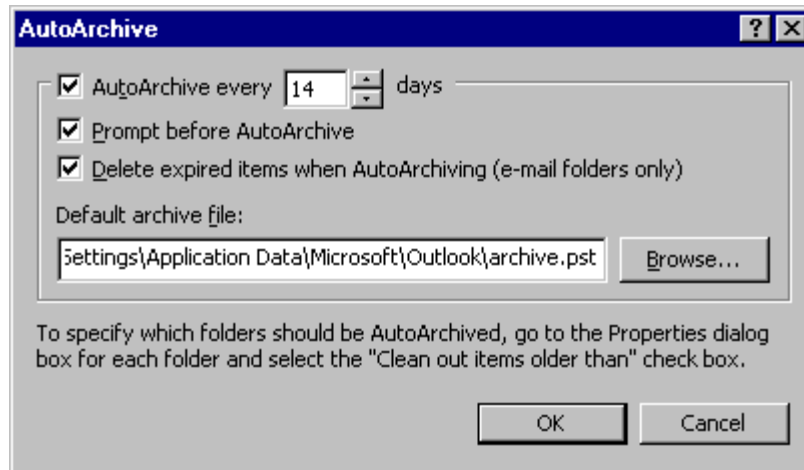
Figure 5. The AutoArchive global settings dialog box.

The key setting here is the default archive file location. This is the file that your old items will be archived to (with a few exceptions noted below). By default, this file is named Archive.pst, and is located in Outlook's Local Settings directory ("C:*Windows*\\Profiles*username*\\Local Settings\\Application Data\\Microsoft\\ Outlook\\").

Per-folder AutoArchive settings. If you want to set custom AutoArchive settings for each of your folders, you can go to the AutoArchive properties page for each folder (right-click on the folder, choose Properties, then go to the AutoArchive tab). When AutoArchive runs on each folder, it will look at these settings to determine which items to Archive and where to put them.

Figure 6. Calendar AutoArchive properties.

In the dialog box above, the user has chosen to move any appointments that are more than six months old into the specified archive PST file. The user could have also chosen to permanently delete the old items instead of moving them into the archive PST file (this is the default AutoArchive behavior for the Deleted Items folder).

Note You will notice that you can enter a separate archive PST file location for each folder. Outlook will fill in this location for you by default, using the file location in your global AutoArchive settings. But be careful when changing your global AutoArchive file location, because the per-folder file location setting for a given folder will only change to match the global setting if you have never AutoArchive any items out of that folder. Once you AutoArchive any items from a folder, the per-folder file location "sticks" and will not change to follow the global file location setting.

If you never customize your per-folder AutoArchive settings, your folders will have the following default settings:

Folder	AutoArchive on/off	Action	Older than
Calendar, Journal, Tasks	On	Move	6 months

Sent Items	On	Move	2 months
Deleted Items	On	Delete	2 months
Contacts	Never archived		
Inbox, Drafts, Outbox, Notes	Off	Move	3 months
User-created folders	Off	Move	3 months

Contacts are never archived because Outlook does not record a "last viewed" time for each Contact. Outlook assumes that you will always need to access any of your Contacts. If you would still like to "archive" contacts that are out-of-date, you can open your archive file (instructions below) and manually drag them into your archive folders.

Dates

The date used to determine when an item will be archived depends on the type of item.

Item type	Archive date
E-mail message	The sent date, received date, or last modification date, whichever is later.
Appointment	The appointment end date or the last modification date, whichever is later.
Task	The completion date or the last modification date, whichever is later. (Tasks that are not marked complete are not archived. Tasks assigned to others are archived only if marked complete.)
Note	The last modification date.
Journal entry	The date the journal entry was created or the last modification date, whichever is later.
Contact	Never archived.

Opening an Archive File

If at any time you need to access items that have been archived, simply open the archive PST using the File | Open | Personal Folders File command. Make sure your Folder List is visible (View | Folder List), then you will be able to see both the archive file and your current data file. You can now search through your archive folders to find old items, open up and edit those items, and even copy them back into your current data file.
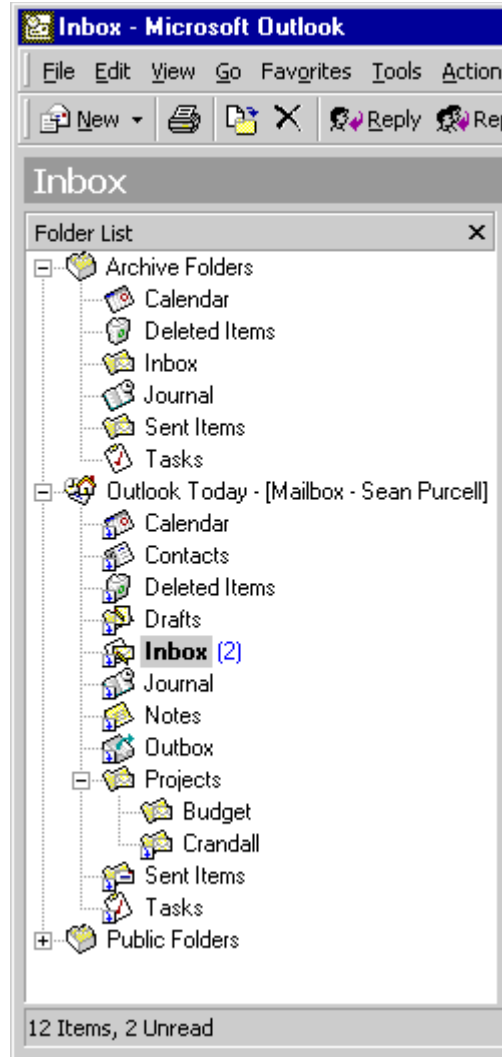
Figure 7. Archive folders listed in the Folder List.

Note There is nothing special about an archive PST that makes it any different than a regular PST. All PSTs have the same file format, and you can move items and folders in and out of them interchangeably.

Manual Archive

If you wish to manually archive items from a folder, you can use the Archive dialog box (File | Archive). This dialog box lets you archive any items in the selected folder (and subfolders) older than the date you give.
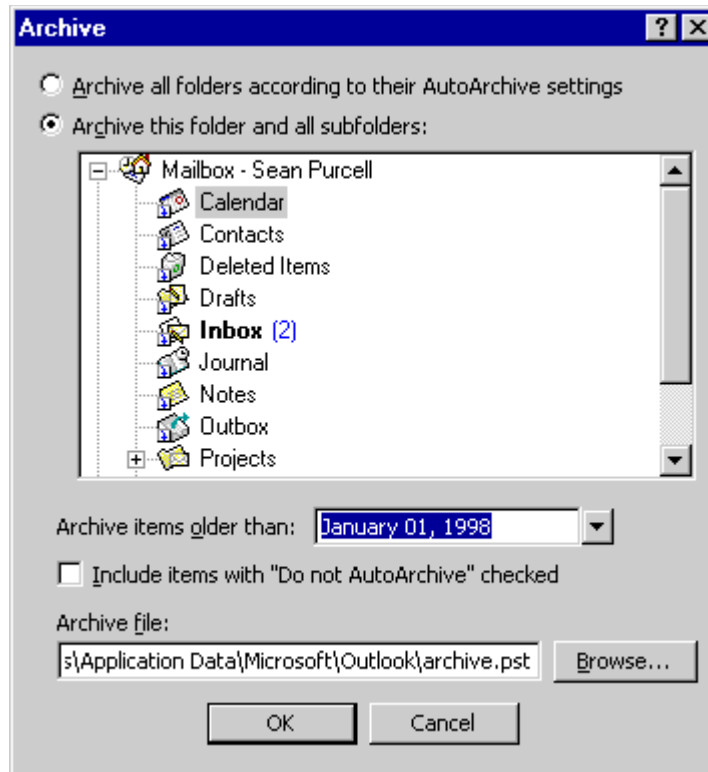
Figure 8. The Archive dialog box.

To archive an entire folder, you can set the archive date to the current day. This is a great way to archive a project folder once the project has been completed.

Synchronizing Folders Between Computers

Synchronizing Your Personal Folder File (PST)

In Outlook 97 and Outlook 98, there was no way to synchronize the information in one PST file with a PST file on another computer. But now this is possible in Outlook 2000 with the new Personal Folder Synchronization add-in.

Note Personal Folder Synchronization is currently in its beta phase. It will not ship with Outlook 2000, but will be available for download on the Microsoft Web site (*http://microsoft.com/outlook*) soon after Outlook 2000 is released.

Once installed, Personal Folder Synchronization lets you save the latest changes from your office computer to a synchronization file. This file can be saved to your hard drive or a network share, or it can be split across a set of floppy disks. When you open this file on your home computer, the contents of your folders will be updated. If there are any conflicts, Outlook gives you the opportunity to resolve them. After working for a while on your home computer, you can then save a return synchronization file to bring any changes you've made back to your office computer.

Synchronizing Your Office PST with Your Home PST

Using disks. If you want to synchronize the folders on your office computer with those on your home computer, you can use floppy disks to transfer your synchronization file. Outlook will save the minimum amount of information necessary to communicate the latest changes, but in some cases this will require more than one disk. If you have a ZIP drive or other high-capacity medium, you can also use this to save your synchronization files.

Using a RAS connection. If you have a Remote Access Server (RAS) connection to your office network, you can keep your computers synchronized without carrying disks back and forth. Just save your synchronization file to a shared directory at the office, and download it from home.

(Using e-mail—not recommended). It is not recommended that you e-mail synchronization files as attachments between your office and home computers. Synchronization files can be very large, and as such the messages may be rejected by your e-mail server.

Note if you have an e-mail account at home that is different from your account at work, you can always use Net Folders to share folders between your office and home accounts. Net Folders doesn't let you share your Inbox or Outbox, but it's a good solution if you need, for example, to share a Contacts folder.

Synchronizing Your Office EMS with Your Home PST

Without RAS. If you can't connect to your Exchange Server via a RAS network connection, then you can use Personal Folder Synchronization to synchronize your EMS folders at the office with your PST at home. In this case you can use floppy disks, ZIP disks, or other high-capacity media, just as you would if you had a PST at the office instead of an EMS.

The Personal Folder Synchronization add-in will not allow you to synchronize Exchange Server Public Folders.

With RAS. If you can dial into your EMS with a RAS connection from home, then you will not need to use Personal Folder Synchronization—you should instead use Exchange Server offline folders to keep a local OST file on your home computer and synchronize it periodically with your Exchange Server.

How Personal Folder Synchronization Works

Personal Folder Synchronization works by taking a "snapshot" that catalogs all of the items in the folders you want to synchronize on the office computer. Each time you save a new synchronization file, Outlook compares the current contents of the selected folders with the last snapshot. If any items have been created, deleted, moved, or modified, Outlook will save this information in the synchronization file. Outlook will also include the current snapshot in the synchronization file, so that the destination computer can double-check that it isn't missing any items.

Tip With Personal Folder Synchronization it's a good idea to bring synchronization files back and forth between both computers as consistently as possible. This is because the source computer will keep sending the old synchronization information until it gets a return synchronization file from the

---

destination computer. If you only save synchronization files in one direction (i.e., from the office to home only) the synchronization files will get larger and larger.

Skipping synchronization files. This feature does not, however, require that you keep a strict "office to home, then home to office" routine. Personal Folder Synchronization keeps sending the same information until it hears a response, so if you ever lose or skip a synchronization file all you have to do is save another one and it will contain all of the skipped information. You can even "cross" synchronization files, or read them in out of order (while this is not encouraged, the worst outcome will be item modification conflicts). And if at any point your data is badly out of sync, all you need to do is perform a full "roundtrip"—office to home, then home to office—to fully synchronize your folders.

Synchronizing multiple computers. Personal Folder Synchronization will let you keep more than two computers synchronized, but you must make sure to synchronize them in a "hub" configuration, with one central source computer that synchronizes with several destination computers. You should never use a "web" configuration, where destination computers also synchronize with one another, because this will generate duplicates of all of your items. It's a good idea to limit the number of computers that you keep synchronized, since each new computer you add requires keeping an additional "snapshot" in your central computer, and these snapshots can be large depending on how many folders you keep synchronized.

Synchronizing Your Exchange Folders Between Computers

Keeping Local Copies of Your Exchange Server Folders: Offline Folders

Users of the Outlook messaging and collaboration client running against an Exchange Server can take advantage of its rich synchronization features. If you have an EMS mailbox, you can keep an offline copy of your Exchange Server folders (both private mailbox folders and Public Folders) in an Offline Folder file (OST). You can then work from your Offline Folders just as you would while you were connected to your Exchange Server. When you connect again, any changes that you've made will be synchronized with your Exchange Server folders, and vice versa. This is an ideal configuration for laptop users.

To choose which folders to make available for offline use, go to the Tools menu, choose Synchronize, and then choose Offline Folder Settings. This new dialog box lets you check off the folders that you want to be available offline (as well as other synchronization settings).
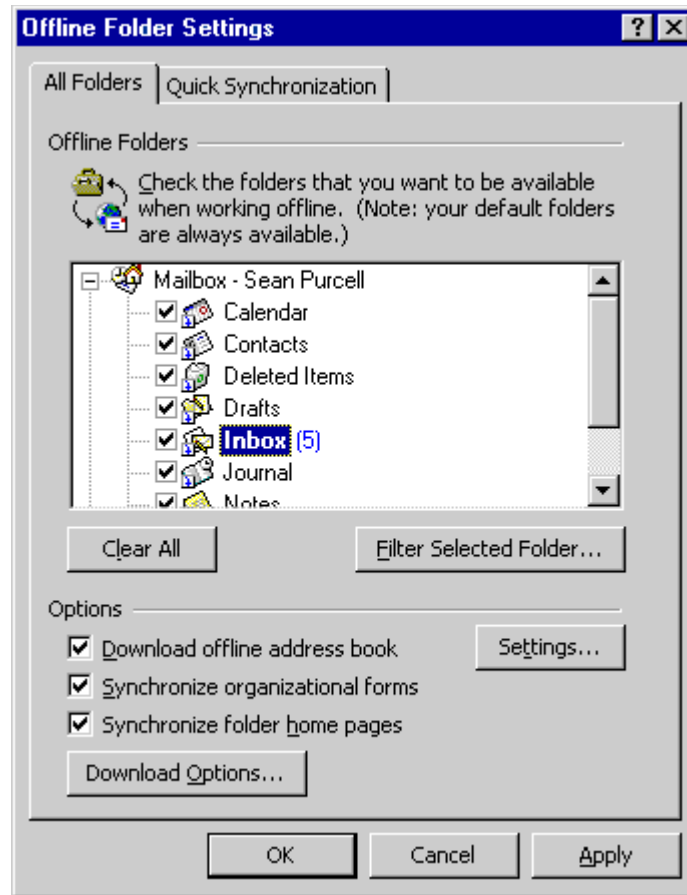
Figure 9. The Offline Folder Settings dialog box.

If you're on the road, or working from home, you can also configure Outlook to automatically dial up your Exchange Server and synchronize your folders on a regular schedule. You can set your synchronization schedule on the Mail Services tab of the Tools | Options dialog box, and you can set your Exchange Server dial-up settings in your Exchange Server properties dialog box (Tools | Services | Microsoft Exchange Server Properties | Dial-Up Networking).

Sharing Folders with Other Users

Sharing Folders Using Net Folders

The Net Folders feature lets you automatically share information from your computer across the Internet. You can share folders with other users without having an Exchange Server or file server. For example, you can use Net Folders to share Outlook folders (Calendar, Contacts, etc.) from your computer to any other Outlook user anywhere. You can also broadcast messages to a group of people in much the same way as an e-mail list server does.

When you use Net Folders to share a folder, a copy of the shared folder appears in the Outlook Folder List of everyone who subscribes to the folder. For example, if you share a folder called Crandall on your computer, everyone who subscribes to that folder will have a Crandall folder added to their Folder List. Any item you

put in the Crandall folder on your computer is automatically sent to the Crandall folder of all of the subscribers. If you modify an item in the Crandall folder, the changed item is updated for all of the subscribers. Net Folders can be used to share messages, calendars, tasks, contacts, or any other Outlook item.

The owner of the shared folder assigns a permission level to each subscriber that determines how they can work with items in the Net Folder. For example, the editor permission level allows a subscriber to add new items or change existing items in a Net Folder. Items changed by subscribers are updated in the original folder and in all subscriber folders.

Net Folders works by sending hidden messages back and forth between the owner and the subscribers. Whenever the owner (or a subscriber with editing permissions) changes items in the folder, updates are silently sent to all of the subscribers. If the subscribers are Outlook users, these hidden e-mail messages will cause the items in the folder to be automatically updated. You can share e-mail messages with subscribers who do not use Outlook, but they receive these items in their Inbox, and subscriber folders are not created. Outlook items other than e-mail messages (such as Calendar items or contacts) are not usable by other e-mail programs. Special folders such as the Inbox, the Outbox, any Exchange Server folders, and any Exchange Offline Folders cannot be shared using Net Folders.

Sharing Folders Using Microsoft Exchange Server

Outlook users running against an Exchange Server can take advantage of rich collaboration and information sharing features.

Public Folders

Public folders let users share information with other users on their Exchange Server. Users (or their server administrator) can add a folder to the Public Folders directory, and its items can be viewed and edited by other users. (Administrators can of course assign various permission levels to their users.) Public folders can be used as project folders, shared contact lists, discussion forums, group calendars, etc. They can also be used to house custom forms applications.
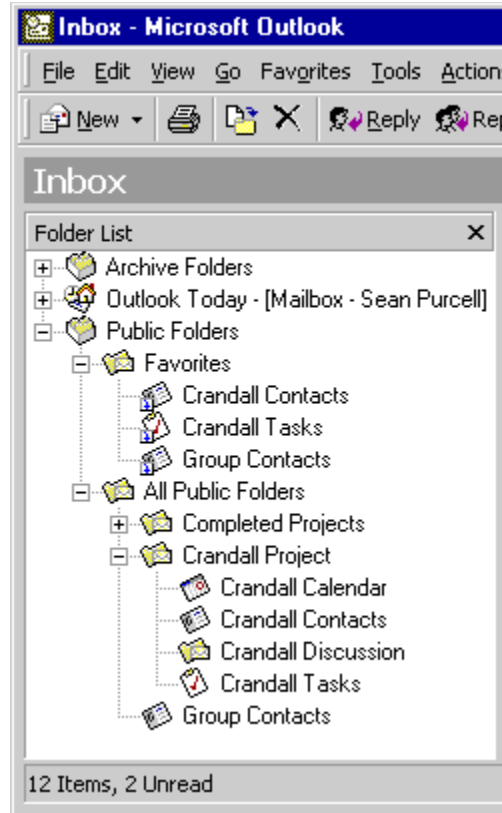
Figure 10. This folder list shows the user's public folders tree, including the "Crandall Project" folders, and a shared "Group Contacts" folder. The user has also chosen three of these public folders as "Favorites."

If you want to work with your favorite public folders while you aren't connected to your Exchange Server, you can keep offline copies of them in an OST file, just as you would with the private folders in your EMS mailbox. To do this, first add the public folder to your list of public folder favorites, either by dragging the folder from its original location into your "Favorites" tree, or by selecting the folder and choosing File | Folder | Add to Public Folder Favorites. Then choose Tools | Synchronize | Offline Folder Settings and select the folders that you would like to be available offline.

Delegates

The Delegate feature allows a user to manage other people's Exchange Server folders from within Outlook (for example, an assistant would use this feature to coordinate a manager's schedule).

After the manager sets the assistant as a delegate from the manager's computer, all meeting requests sent to a manager also appear in the assistant's Inbox. The assistant can accept meetings, enter appointments, and organize meetings on the manager's behalf.
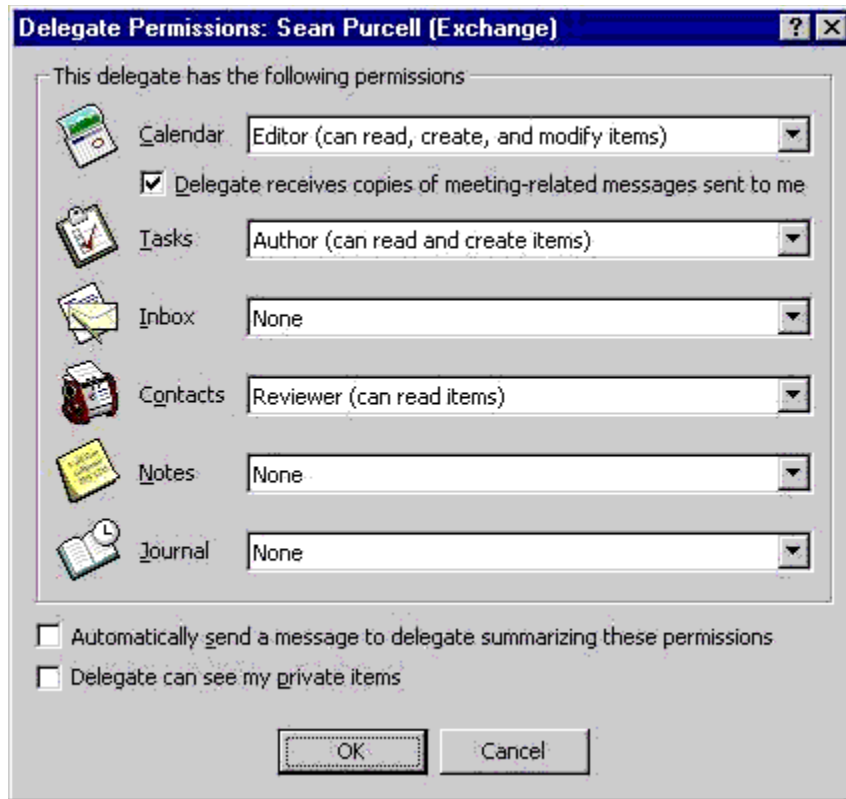
Figure 11. A manager has set Sean Purcell as a delegate (from the Delegate tab of the Tools | Options dialog box) and has chosen various permission levels for each folder.

Once the manager has set a user as the delegate, the delegate can then open any of the manager's accessible folders by choosing File | Open | Other User's Folder.

Frequently Asked Questions

Is archiving the same thing as backing up?

No. Archiving takes old items and moves them into a separate archive file. Archiving is a tool for cleaning up and organizing your folders, not for making backup copies of them.

What's the difference between archiving and exporting to a PST?

Archiving *moves* items into another data file, removing them from the current data file. Exporting puts *copies* of items into another data file.

How do I find out how large my Outlook data file is?

Right-click on the root folder and choose Properties. In the Properties dialog box, click the Folder Size button. This will calculate the total size of the data file, as well as the size of each subfolder.

If your data file is a PST, you can also look at its raw file size with the Windows Explorer, just as you would with any other file. Note that the raw and calculated file sizes of a PST are not always identical.

What is the default Outlook data file (where is my new mail being delivered)?

The default data file is the file that new mail is being delivered to. You will also only receive reminders from items in the Calendar, Contacts, Inbox, and Tasks folders in your default data file. In the Folder List, the default data file will have the special Outlook Today icon and will have "Outlook Today" displayed in front of its name.

Internet Mail Only support. In Internet Mail Only support, you can change your default data file by right-clicking on the new file's root folder and choosing Properties. On the General tab of the Properties page, there is a checkbox that reads "Deliver POP mail to this personal folders file." Checking this checkbox will set this as your default data file (you will first need to exit and restart Outlook for the change to take effect).

Corporate or Workgroup support. In Corporate or Workgroup support, you can change your default data file by going to the Tools menu and choosing Services. In the Delivery tab of the Services dialog box there is a "Deliver new mail to the following location" dropdown list. This will let you select your new default data file (you will first need to exit and restart Outlook for the change to take effect.)

While all Exchange Server users have an EMS file on the server, some users choose to set a local PST as their default data file. This causes all new mail to be delivered to the PST on their computer. Keeping your information on your local hard drive generally results in faster performance (especially if you have a slow network connection to the server) and will also let you avoid the EMS size limits set by your server administrator. The drawback, however, is that you cannot take advantage of Exchange Server synchronization and folder sharing on your PST folders.

What is the "root folder"?

The root folder of a data file is the topmost folder of the data file, containing all of the subfolders.
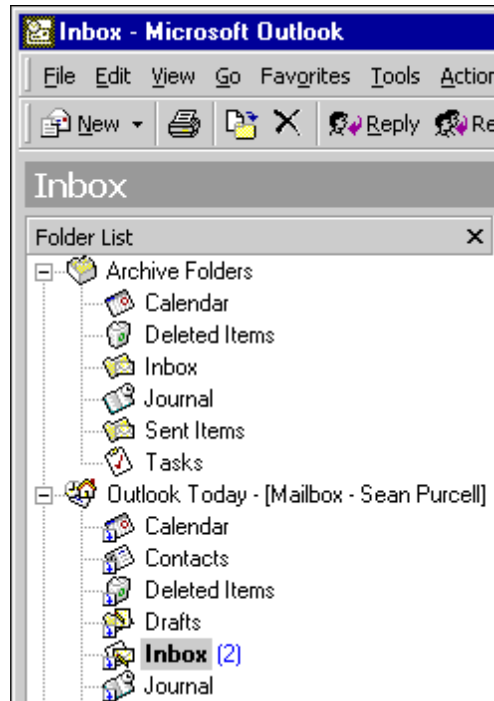
Figure 12. "Archive Folders" is the root folder of the archive PST, and "Outlook Today – [Mailbox – Sean Purcell]" is the root folder of the Exchange Server mailbox.

Are PST and OST files automatically compacted?

No. But Outlook lets you compact these files manually. This does not change the file format in any way, it simply compacts the data files as efficiently as possible so that they will take up less space on your hard disk.

Compact a PST. Find the PST file in your folder list, right-click on the root folder and choose Properties. In the Properties dialog box, click the Advanced button, then click the Compact Now button.

Compact an OST. Find your Exchange Server mailbox in the folder list, right-click on the root folder and choose Properties. Click the Advanced button to get to the Microsoft Exchange Server properties dialog box. From here, go to the Advanced tab and click the Offline Folder File Settings button. Then click the Compact Now button.

For more information: http://www.microsoft.com/office/

❖   ❖   ❖   ❖