<table>
<thead>
<tr>
<th>Version</th>
<th>Date</th>
<th>Change details</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.0</td>
<td>30 June 2010</td>
<td>Extract from the Main Outlook Training manual</td>
</tr>
</tbody>
</table>
Table of Contents

OUTLOOK ARCHIVE ................................................................................................................................. 1
ECS Mail System (Exchange Email) ......................................................................................................... 1
  Organise mail folders .......................................................................................................................... 1
    Best Practice:................................................................................................................................... 1
  Create, modify and remove rules to manage email messages ........................................................... 2
    Best Practice:................................................................................................................................... 2
  Create and manage Outlook data files (Archiving) ............................................................................. 4
    Best Practice:................................................................................................................................... 4
  Locate outlook 2007 items by using Search ....................................................................................... 6
ECS MAIL SYSTEM (EXCHANGE EMAIL)

Website: https://webmail.staff.uwa.edu.au/
Storage Limit: 1GB
Benefits: Centralised “live” mailbox, rules, and appointments. Archived folders are decentralized.

Organise mail folders

Best Practice:
The rule of thumb is to plan and maintain the basic but consistent folder structures from the base year and the following years. Then, create the base rules for managing emails based on the folder structures.

See the example on the right:

This method is the basic folder management to simplify the manual archiving and managing rules.

1) Create a base folder called 2009
2) Create/move subfolders in 2009
3) Repeat Step 1 and 2 for 2010 and 2011
4) Manually move all emails for the year (2009) to the relevant folders/sub folders
5) Create basic rules for managing emails into folders

NOTE: The initial archival will take longer than the subsequent ones. However, once the structure and rules are established, it will make life easier in the following year.
Create, modify and remove rules to manage email messages

Best Practice:

- Worked best with a basic consistent folder structure.
- Rules created for the base folders
- Rules created for the base year
- Rules can be updated with minimal effort in the following year by changing minor information

STEP 1 - Create a rule

1. Right click an email
2. Left click  

   ![Create Rule](image)

   **Create Rule**
   
   When I get email with all of the selected conditions:
   - From UWA IT Service Desk
   - Subject contains Incident \"INC91749\" updated \& shared folder
   - Sent to [email only]

   Do the following:
   - Display in the New Item Alert window
   - Play a selected sound: [Windows XP Notify.wav]
   - Move the item to folder: 1. Service Now

3. Configure the rule as following but **NOT** limited to this guidelines

<table>
<thead>
<tr>
<th>Conditions</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>From</strong></td>
<td>If the address is fixed, select this</td>
</tr>
<tr>
<td><strong>Subject</strong></td>
<td>If the subject is fixed, select this</td>
</tr>
<tr>
<td><strong>Sent to</strong></td>
<td>If emails is sent to recipient chosen</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Do the followings</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Display in the New Item Alert window</strong></td>
<td>If the address is fixed, select this</td>
</tr>
<tr>
<td><strong>Play a selected sound</strong></td>
<td>Customised sound for each email received</td>
</tr>
<tr>
<td><strong>Move the item to folder</strong></td>
<td>Email will be moved to selected folder when received</td>
</tr>
</tbody>
</table>

4. Click **OK**
STEP 2 – Run the rules

**NOTE:** Do this step **ONLY** after you have organized the mail folders

1) Click **Tools**

2) Select **Rules and Alerts...**

3) Select **Run Rules Now...**

4) Tick the rules to be run

5) Ensure that **Run in Folder:** *Inbox*

6) Click **Run Now**

7) Click **Close** once done

STEP 3 - Update the rules

**NOTE:** Do this step **ONLY** at the end of the year

1) Click **Tools**

2) Select **Rules and Alerts...**

3) Select a rule you want to modify

4) Click **Change Rule**

5) Select **Edit Rule Settings...**

6) Modify the conditions and actions or any exceptions by clicking the underlined words

**31 December of each year**

If you follow the best practice suggestion above:
Update folder redirection in the rules on the last day of each year

7) Click **Next >**
8) Modify the action (move it to the specified folder) to change the folder redirection

- **Prev year:** Myfolder in 2009 mailbox
- **New year:** Myfolder in 2010 mailbox

9) Click Finish

10) Repeat Step 1 – 9 for all the rules

**STEP 4 – Delete a rule**

1) Click Tools

2) Select Rules and Alerts...

3) Select a rule you want to delete

4) Click Delete

5) Click Yes

---

**Create and manage Outlook data files (Archiving)**

**Best Practice:**

1) At the end of each year, archive the email manually

2) Once archived, copy the archive PST files from C:\Documents and Settings\yourusername\Local Settings\Application Data\Microsoft\Outlook to MyDocuments\Outlook Backup

As an example, for archiving mail folder 2009 manually

**STEP 1- Create an Outlook data files**

1) Click Tools -> Account Settings

2) Click Data Files

3) Click Add...
4) Select Office Outlook Personal Folder File (.pst)

5) Click **OK**

6) Save in: your own preferred location (External Hardrive etc)

   ![Create or Open Outlook Data File](image)

   **Create or Open Outlook Data File**

   **Save in:**

   ![Save in: 2ndhDD (Q)](image)

7) Call it Archive2009

   ![Create Microsoft Personal Folders](image)

   **File name:** Archive2009

   **Save as type:** Personal Folders

8) Click **OK**

9) Name the personal folder Archive2009 (This name will appear on the list of the mail folders)

10) Click **OK**

11) Check that you have a folder

   ![Archive2009](image)

   ![Deleted Items](image)

   ![Search Folders](image)

**STEP 2 - Move/Copy the mail folder annually to the archive PST files**

1) Right click 2009 mail folder

2) Left click **Move “2009”...** or **Copy “2009”...**

3) Highlight **Archive2009**
4) Click **OK**

**Locate outlook 2007 items by using Search**

1) Select the folder you want to search for the email

2) Type in a keyword in the **Search 1. Service Now**

3) Click **Search**