

Managing Outlook Data

By

Christopher A. Leonti

Information Technology Support Specialist
College of Ag / Montana Ag Experiment Station
Montana State University-Bozeman
<http://ag.montana.edu/infotech>

This document has been created to help manage the amount of data you store on the Exchange server. Exceeding your Exchange quota can restrict or prevent e-mail from being sent and/or received and it is not hard to accidentally exceed the quota. This is especially true if you need to keep a lot of correspondence for historical reference. This document details numerous actions you can take to help manage your Outlook data.

NOTE: All directions are based upon Outlook 2010 as it was the most current version of Outlook when this document was created. Most of the features detailed are available in earlier versions of Outlook and in some cases the steps will be similar if not exact. That said, please be aware that the steps specified can vary if you are using a different version of Outlook.

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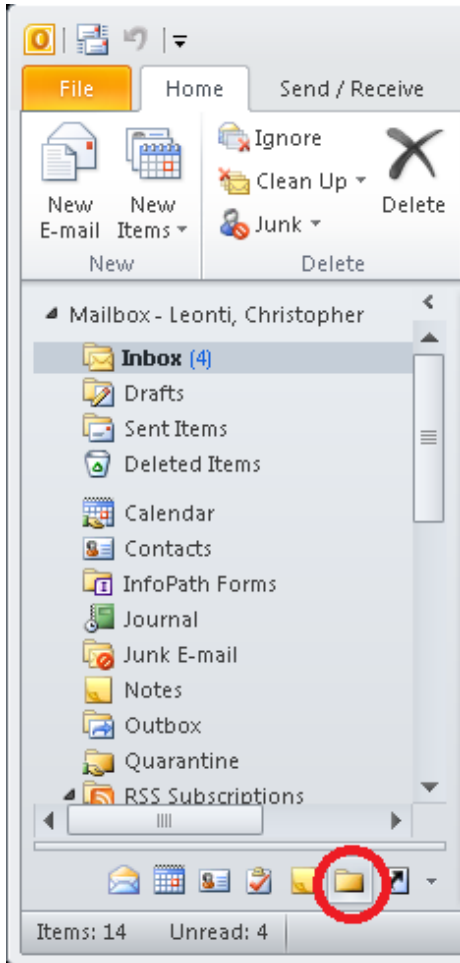
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Changing Your Outlook View To Folder List

By default Outlook shows folders related to the feature you are using. This means you mostly see things specifically related to e-mail when in the InBox and things related to appointments when in the Calendar. This can make using Outlook easier in some ways, but it also means some folders are 'hidden' from view. These hidden folders may contain information taking up space without you realizing it.

1. Ensure you are in the main Outlook window – not an open e-mail.
2. Click the folder list button in the lower left hand side of the window.

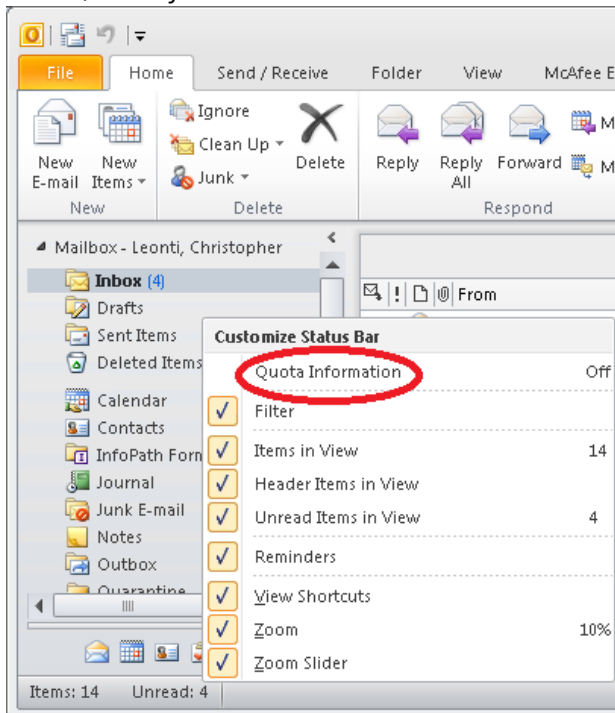


If you want to change the view from Folder List just click the appropriate icon below the list of folders (i.e., the Mail Envelope icon to return to the MAIL view, the Calendar icon to enter the CALENDAR view, etc.).

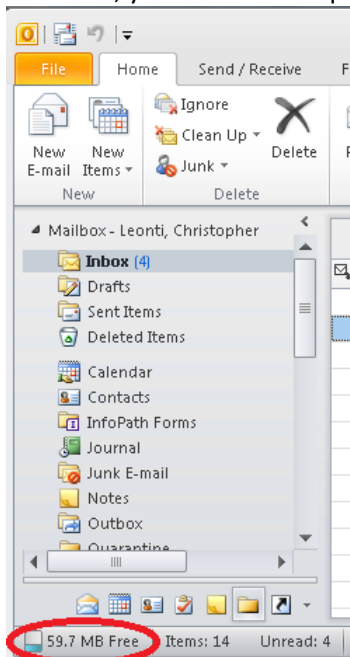
Adding Exchange Server Quota Info To The Status Bar

You can add some basic Exchange Server quota information to the bottom of the Main Outlook Window. This allows you to quickly see how close you are to your quota.

1. Ensure you are in the main Outlook window – not an open e-mail.
2. Right-Click the left-hand side of Outlook Status Bar.
 - a. This is found at the very bottom of the Outlook window typically showing the number of items.
3. Click *Quota Information* in the new menu.



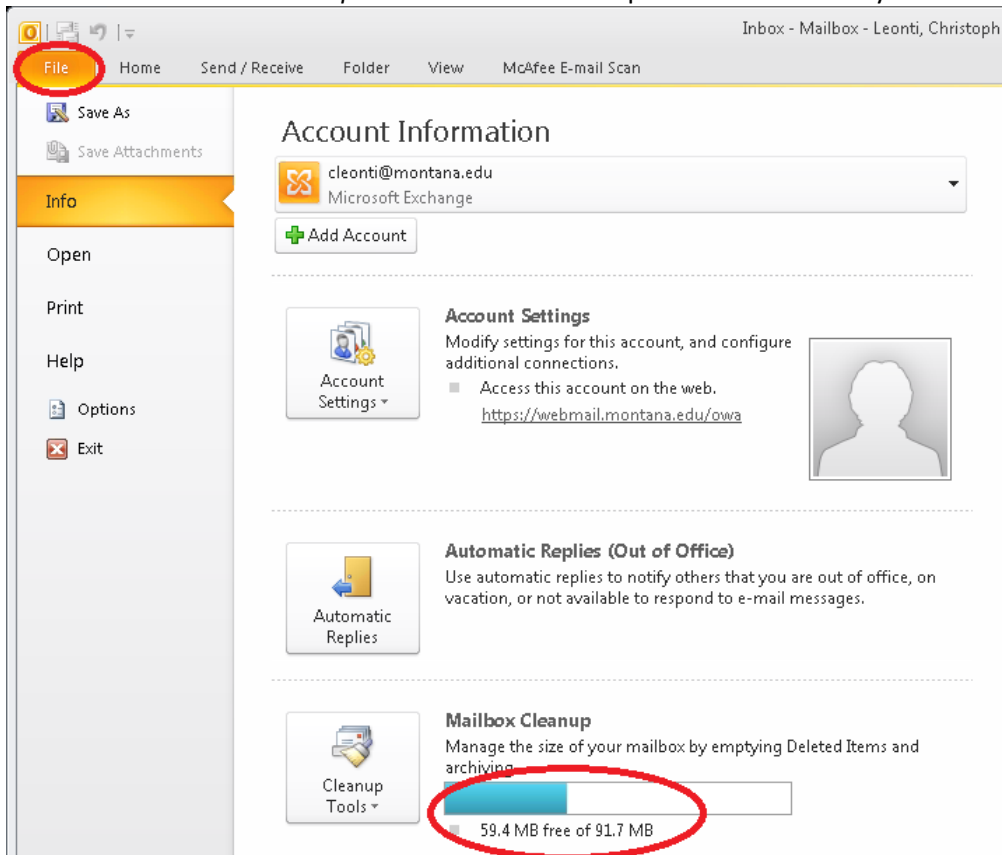
Once this is done, you will see the quota information displayed in the bottom left as shown below.



See Quota Info

If you need to see what your total quota is as well as how much is available you will want to do the following:

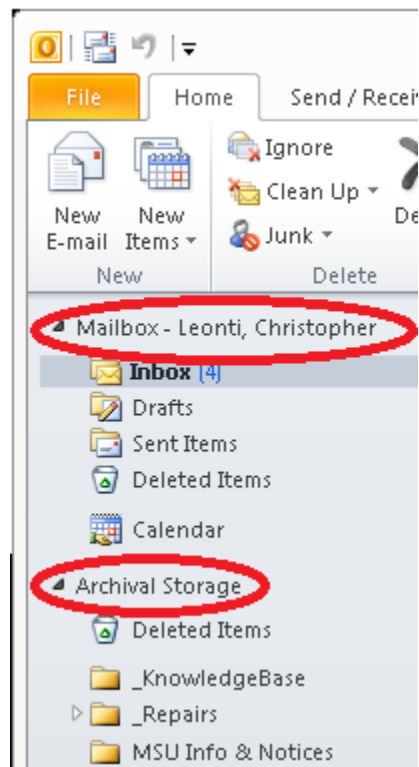
1. Ensure you are in the main Outlook window – not an open e-mail.
2. Click the FILE ribbon at the top of the window.
3. Click the **Info** option in the left hand pane of the new window.
4. Look for the *Mailbox Cleanup* section and note the space used as well as your total quota.



Determining How Much Space Folders Use

It is always a good idea to know how much space you are using within Outlook. The amount of space used on the Exchange server is very important as sending and receiving of e-mail can be delayed or stopped if you exceed your quota. It is also commonly believed that only data in the InBox or Sent Items impact towards your quota when in fact all folders indented under *Mailbox* - in the [folder list](#) count. Due to this it can be very helpful to know which folders are using the most space.

It is also possible that you have Outlook information stored both on the Exchange server and in a local PST file. To determine if you have more than one location for saving your information, you will need to take a look at your main Outlook window as shown below.

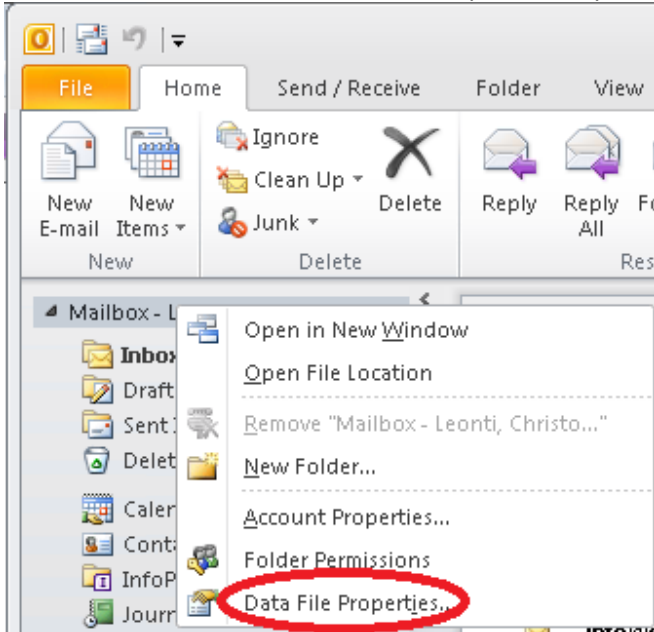


The circled items listed show two different locations where information is saved. The top one starting with *Mailbox* - is on the Exchange server. The Exchange server info will always start with *Mailbox* – and will also be shown first in the folder list. Everything indented below this heading counts towards your Exchange quota.

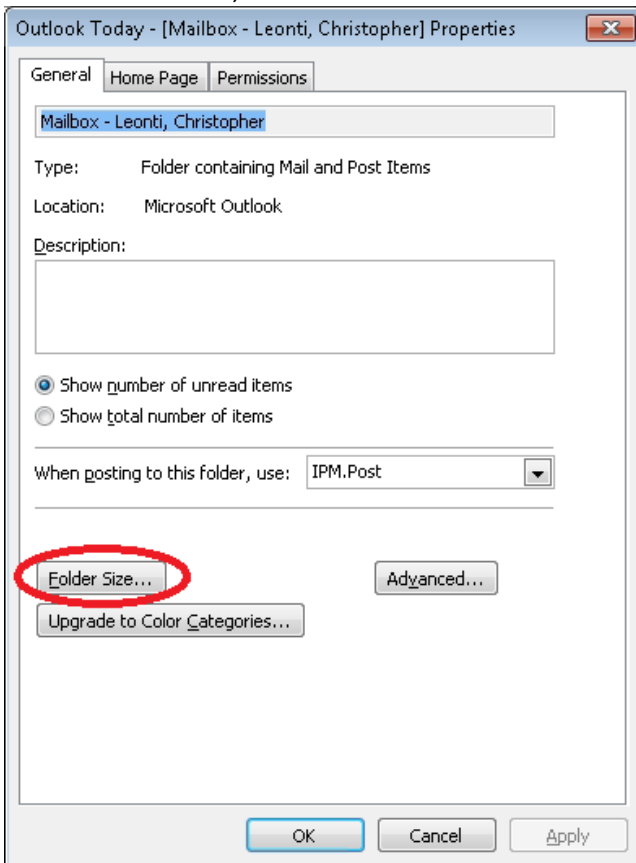
To check the size detail for data stored on the Exchange server or a PST file, do the following:

1. Ensure you are in the main Outlook window – not an open e-mail.
2. In the folder list, right-click the top-most item (the line starting with *Mailbox* – or the PST name).

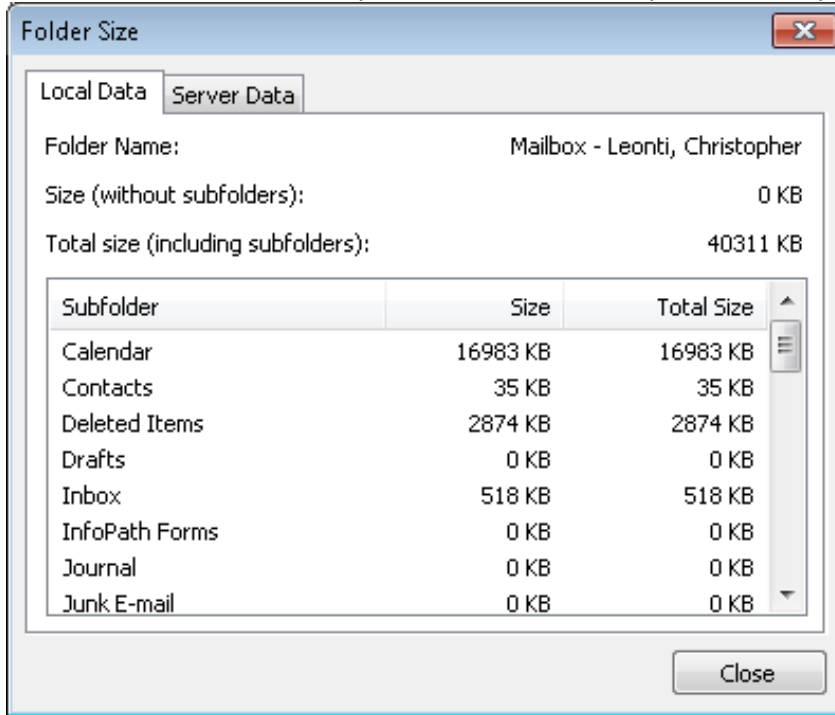
3. In the new menu click the *Data File Properties...* option.



4. In the new window, click the FOLDER SIZE... button.



5. The next window details every folder and how much space is used by it.



Using the numbers shown you can see which folders are occupying the most space. Often looking at what is in the largest folder(s) will help you quickly discover large messages which can be removed or moved to an [archive PST file](#) to keep you within your Exchange quota. There may be folders, such as the *Sync Issues* folder, containing items that you previously were not aware of. In this case you may need to change to the [FOLDER LIST](#) view to see and clean up these folders.

Adding The Size Column

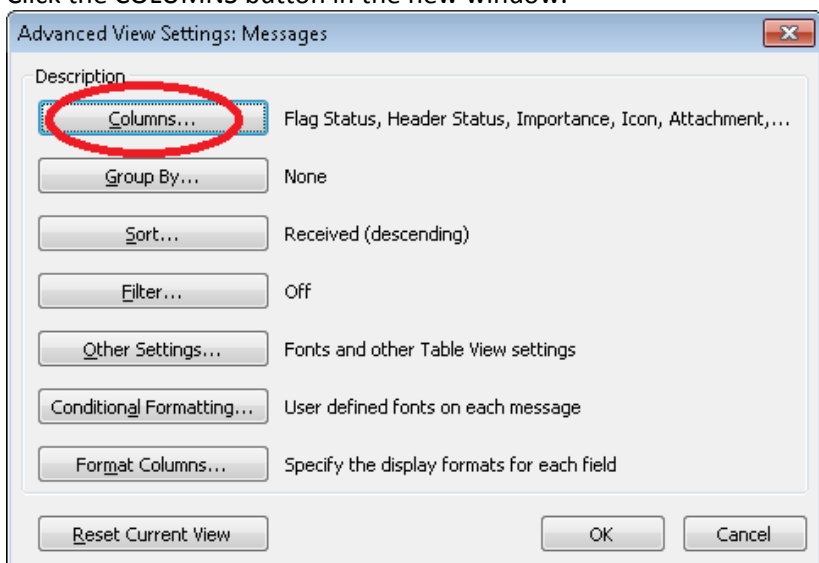
Being able to see the size of an e-mail at a glance is a very handy way to manage your mailbox. This is especially helpful in the InBox as you can quickly determine if you need to archive new messages due to their size.

The process detailed only adds the size column to the folder being viewed and not all folders. This means these steps need to be performed in any folder you want to have the size column. Most often this column is added to the InBox and Sent Items, but you can add it to any folder you need to quickly see the size of items.

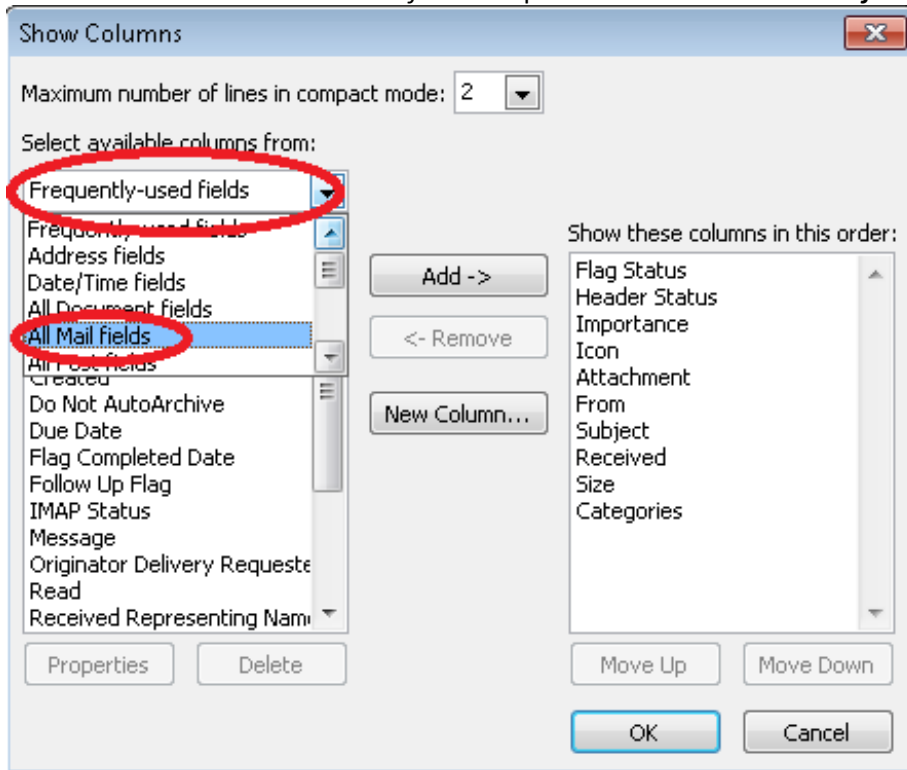
1. In Outlook, open the folder you want to add the SIZE column to (i.e., InBox or Sent Items).
2. At the top of the list of items in the folder, you will see column headings (i.e., From, Subject, etc) - right click anywhere on the column heading bar.
3. Click *View Settings...* on the new menu.



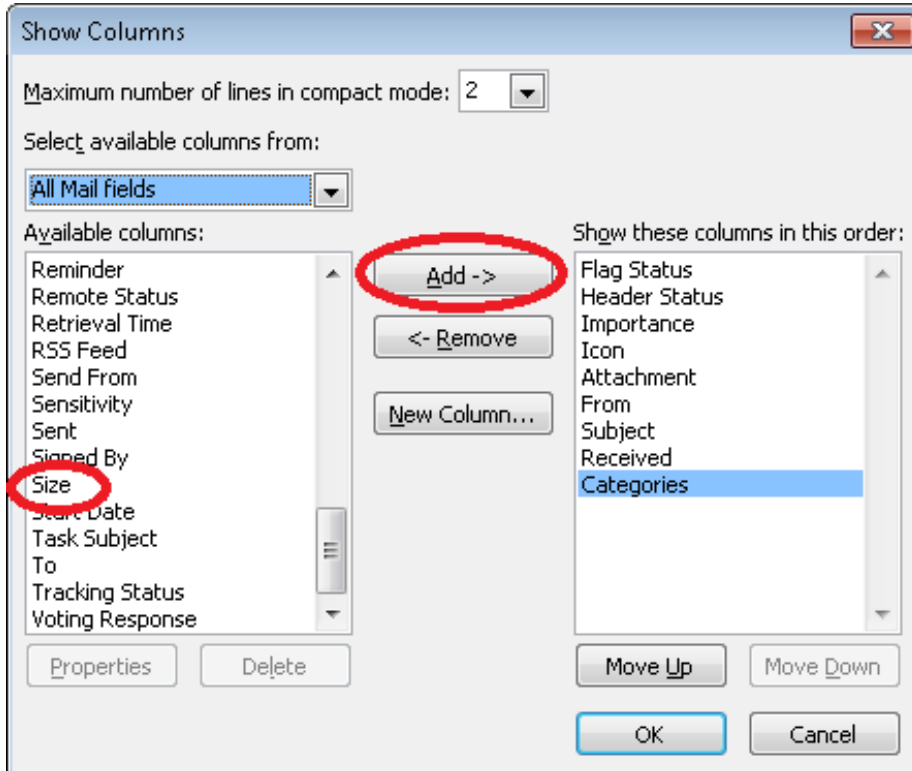
4. Click the COLUMNS button in the new window.



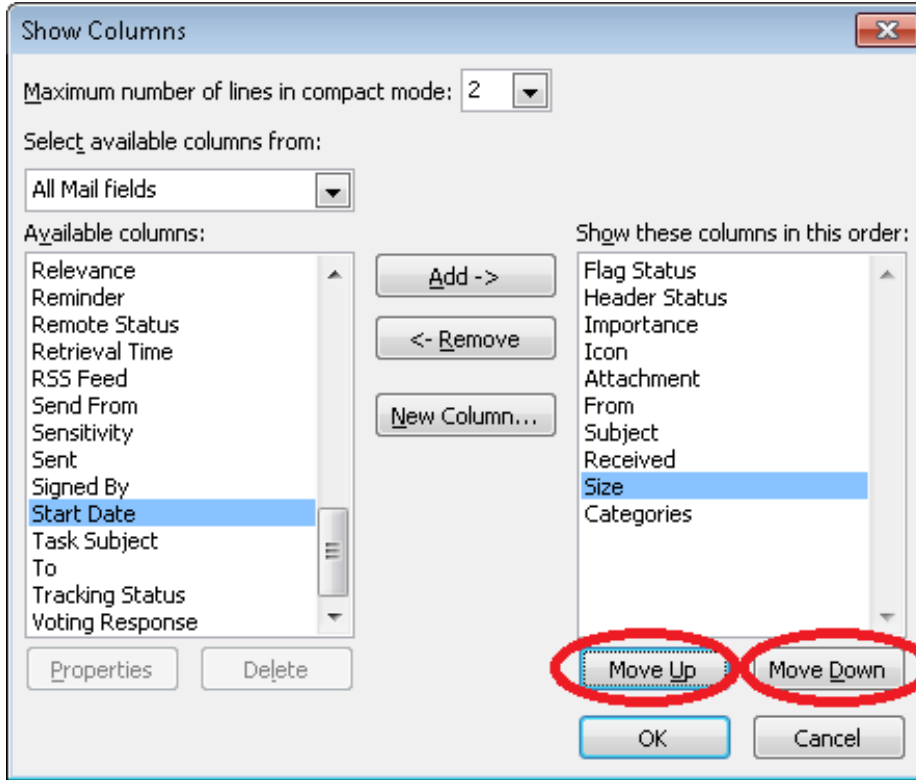
5. Click the *Select available columns from:* drop down and choose **All Mail fields** from the menu.



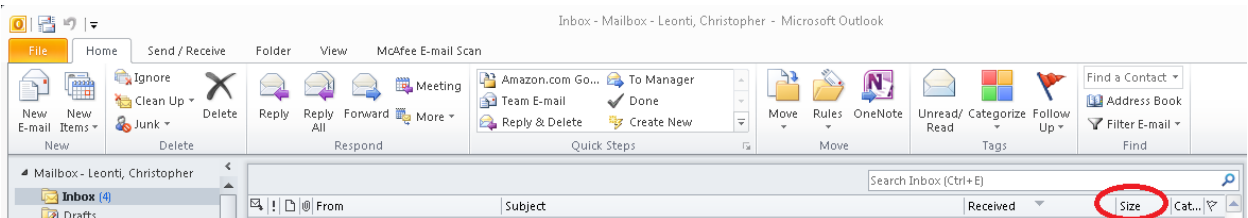
6. The column of items on the right show the items that are already column headings and items to the left can be added as column headings. Scroll down the left column until you see **Size** and click it once.
7. Click the **ADD->** button in the middle of the window.



- The new field is usually added at the end of the column list. If you want to change this, click the size field in the right hand list and then click the **MOVE UP** or **MOVE DOWN** button to change the location.



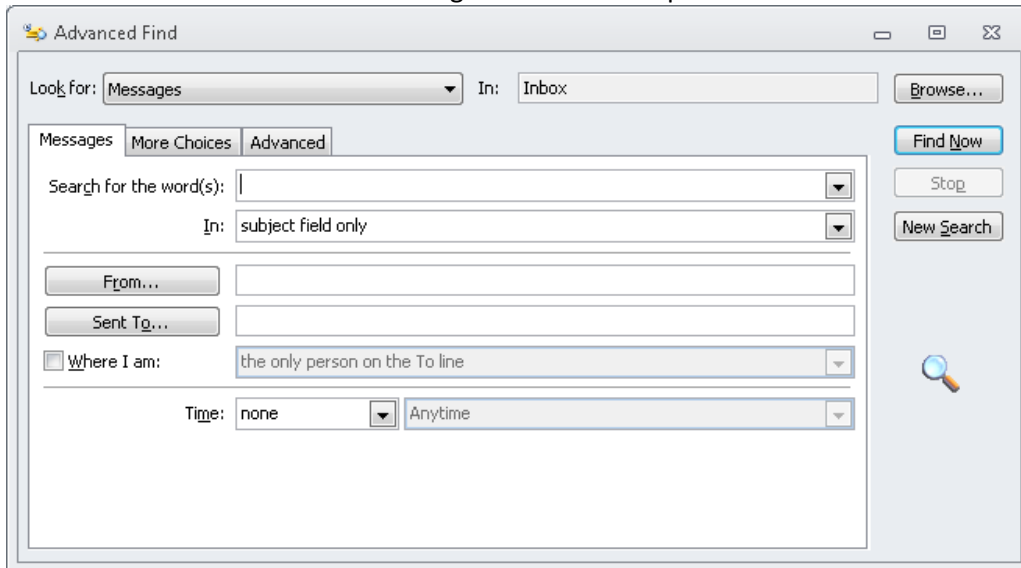
- Click the OK button twice to return to accept the changes.
- The SIZE column should now be added.



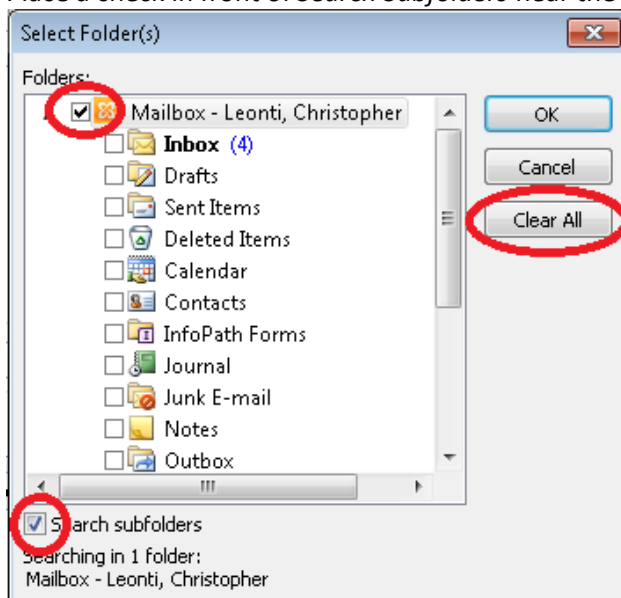
Searching For Large E-Mails

Items in Outlook – especially e-mails – can vary greatly in size. This means that removing a single large e-mail can have more of an impact on your Exchange quota than purging 1,000+ smaller messages. The trick can be finding which messages are the large ones so your cleanup will be the most effective. Using the search feature in Outlook can make finding these larger items fairly simple.

1. Ensure you are in the main Outlook window – not an open e-mail.
2. Press the following keys and then release them (similar to CTRL-ALT-DEL to logon – do not hold):
CRTL-SHIFT-F
3. A new window similar to the following should now be open:

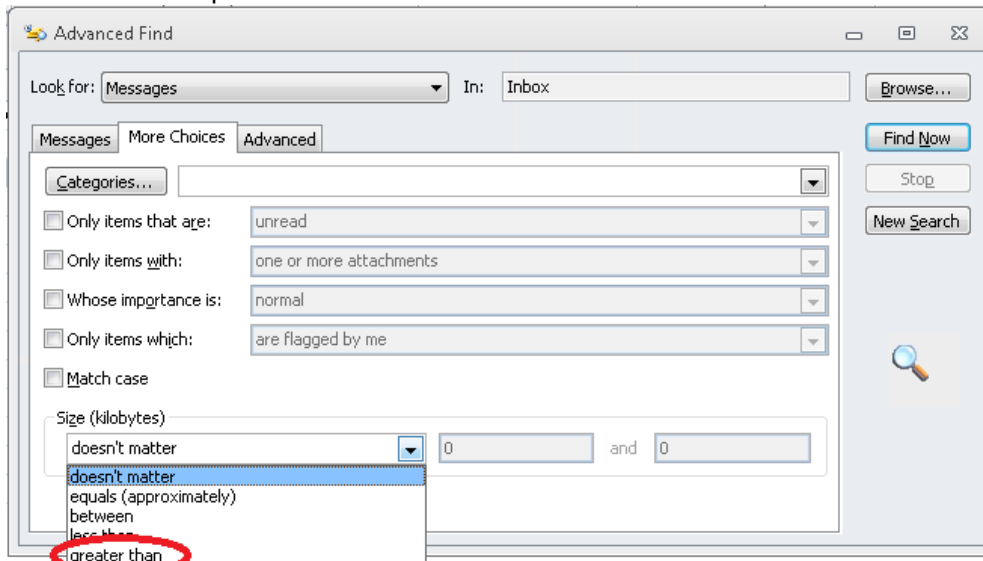


4. Click the MORE CHOICES tab.
5. Click the BROWSE button in the upper right of the window.
6. Click the CLEAR ALL button.
7. Place a check in front of the *Mailbox* – folder at the top of the folder list.
8. Place a check in front of *Search Subfolders* near the bottom of the window.



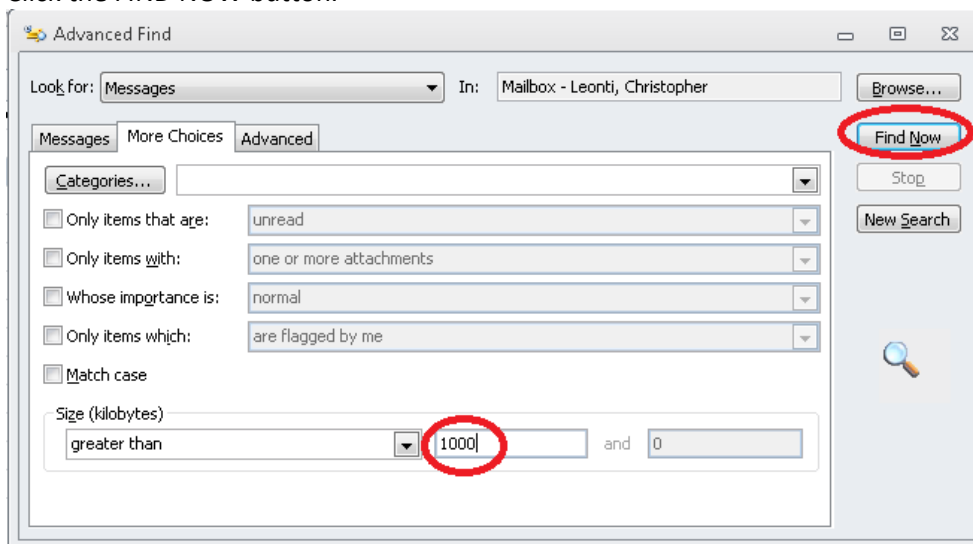
9. Click the OK button

10. Click the SIZE drop down menu and then click GREATER THAN on the menu.

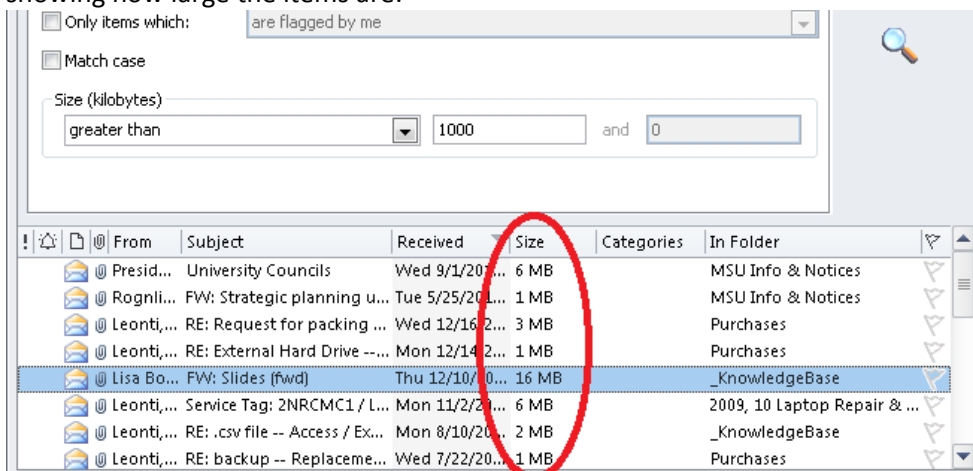


11. Type **1000** in the field to the right of *greater than*.

12. Click the FIND NOW button.



13. You will now see a list of all Outlook items larger than 1 MB in size. 1 MB is not exceptionally large, but is much larger than most e-mails that don't include attachments or images. Note the size column showing how large the items are:



14. If you click the word **SIZE** at the top of the size column the items will be sorted in size order. If you do not see the largest items at the top of the list, click the word **SIZE** again.

Removing the largest items will obviously have the biggest impact on space used, but even items lower on the list can help free up room. In many cases attachments can be saved somewhere other than Outlook and then the message can be deleted. You can also archive larger messages in a [PST file](#) if you need to keep them.

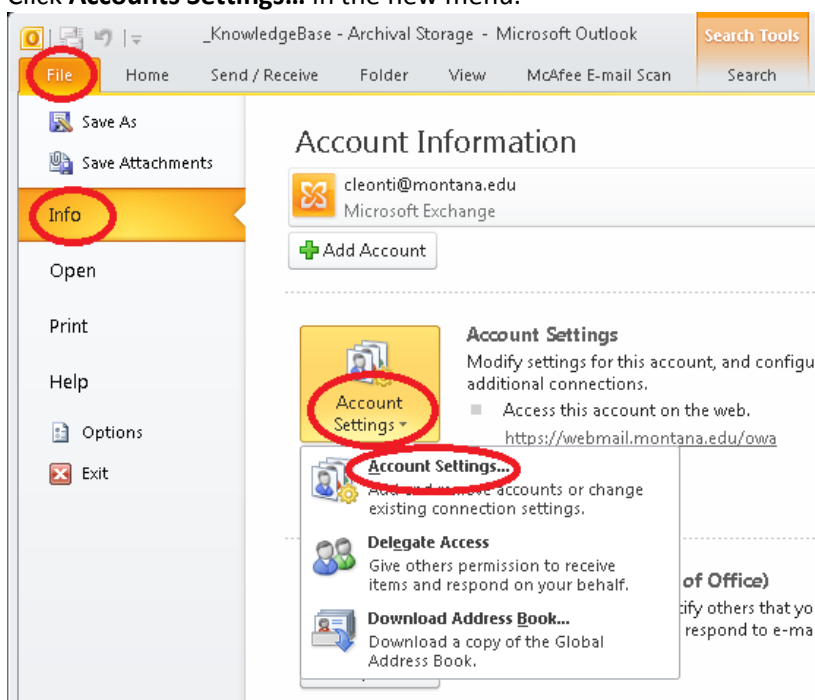
Make sure to empty the *Deleted Items* folder after purging items.

If *Deleted Items* is not emptied you will likely not decrease the amount of your Exchange quota used.

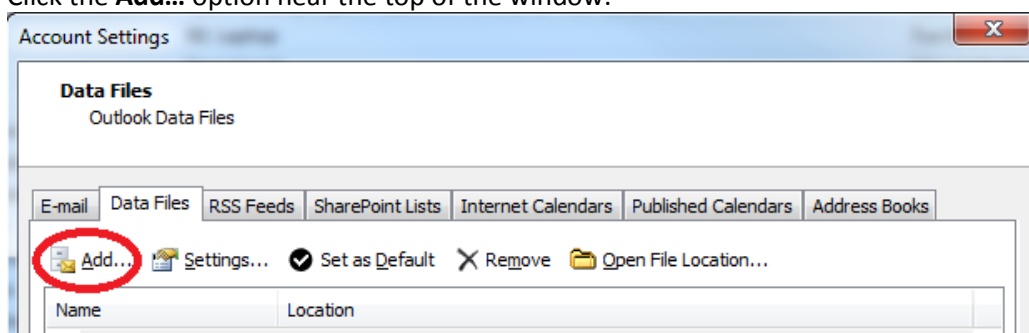
Creating A PST File

If you need to keep a large amount of e-mail and find that you are exceeding your quota a PST file may help. A PST file allows you to store a large amount of information without it counting against your Exchange quota. While this is handy, the information stored in a PST is not backed up centrally so you will want to ensure you are backing up the PST file(s) to prevent loss of any important information. Also information in a PST file is not available when you access your mailbox through Outlook Web Access (<http://outlookweb.montana.edu>). Due to this, you may need to strategically decide which items to archive in a PST so you have access to important information while away from your computer.

1. Ensure you are in the main Outlook window – not an open e-mail.
2. Click the **File** tab on the Ribbon.
3. Click the **Info** option in the left hand pane of the new window.
4. Click the **Accounts Settings** button.
5. Click **Accounts Settings...** in the new menu.

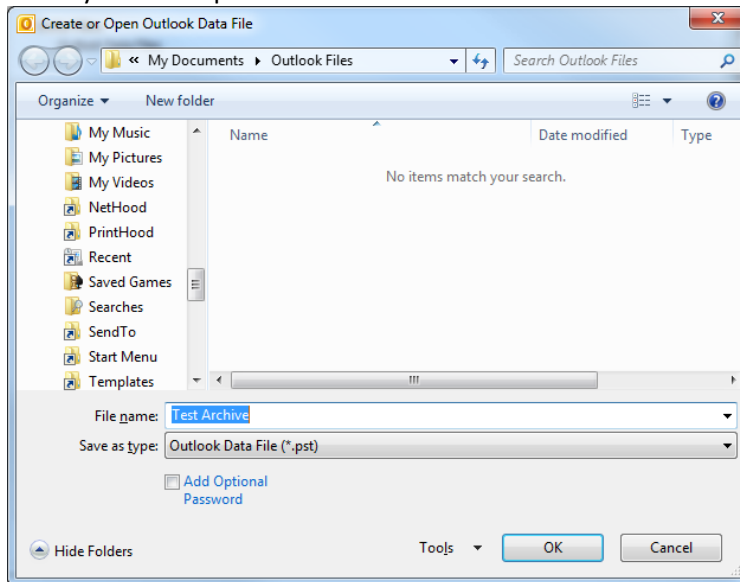


6. Click the **Data Files** tab.
7. Click the **Add...** option near the top of the window.



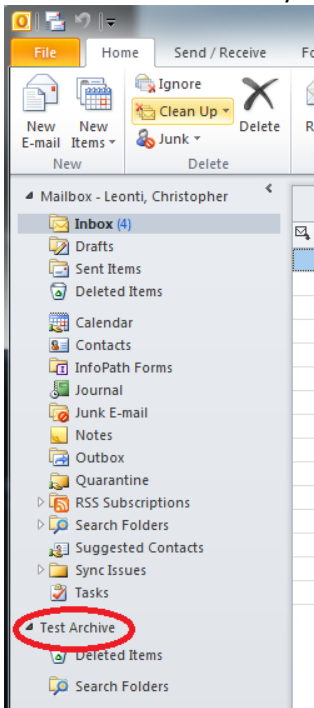
8. You are prompted to name the PST file and choose a location.
 - a) The PST file name can be helpful so ensure it makes sense to you (i.e., Archived E-Mail, 2007-2011 or A-F).
 - The file name is also what you see in the Outlook folder list.

- b) The PST file can be saved anywhere you have access such as an external hard drive, network path or on the C: drive of your computer.
- c) In some versions of Windows and Office the default location is a folder named *Outlook Files* under your Documents folder. If you backup your Documents folder this can be a double edged sword as the PST file will be backed up with your other data, but if the PST file is large it can strain your backup destination.



- 9. Click the OK button to create the file.
- 10. Click the CLOSE button to close the *Account Settings* Window.

You will now see the PST file in your folder list.



You can drag/drop any messages and/or folders from the *Mailbox* – folder list to the PST file. Everything indented under the name of the PST is stored in that file and doesn't count towards your Exchange quota. If you are archiving large quantities of information it may make sense to create more than one PST file and separate them using a hierarchy that makes sense to you such as by year, person, project or alphabetical by topic.

Reduce the size of a .PST file

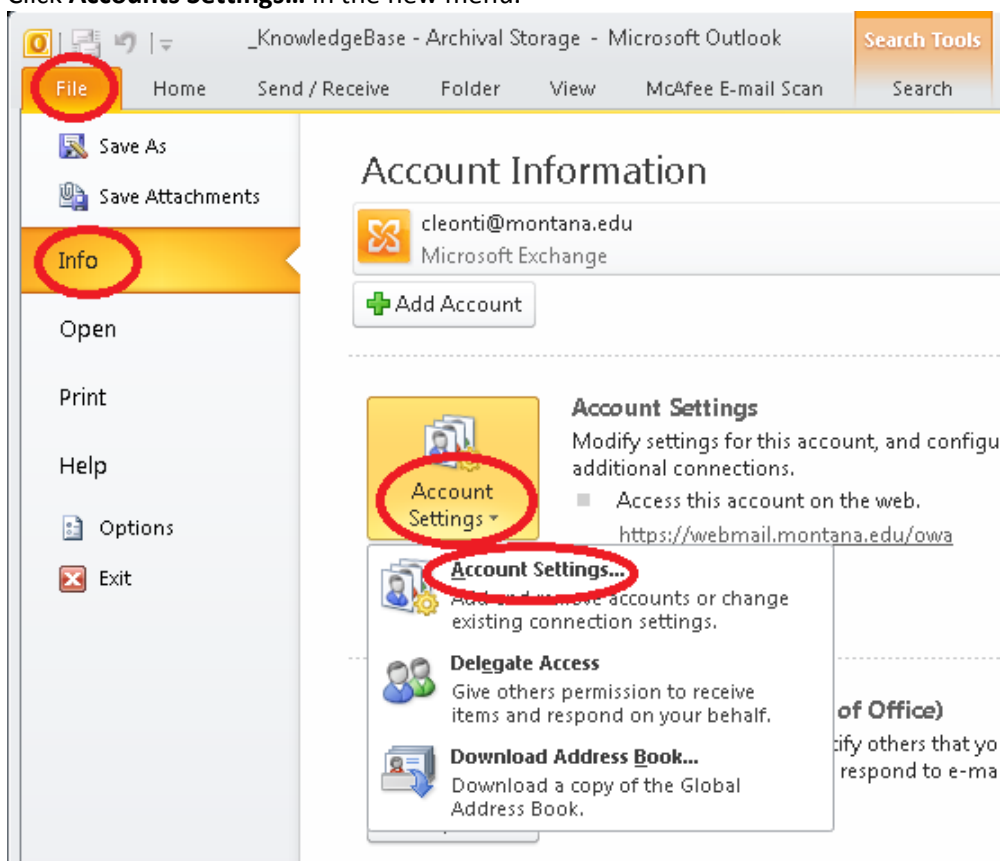
As you add and remove add items from a Personal Folders file (.pst), the size of the file often will not change unless you compact it. Over time this can lead to the PST file becoming unstable and potentially corrupted to the point of being unusable.

Compacting time can vary greatly, but usually it is done in less than five minutes. Do not be shocked if the process takes longer though as some PST files can take over an hour to compress. It is a matter of how large the file is and how much data has been added/deleted to it. If you need to check your e-mail during the compacting process use the Outlook Web Mail system (<http://outlookweb.montana.edu>).

ALWAYS

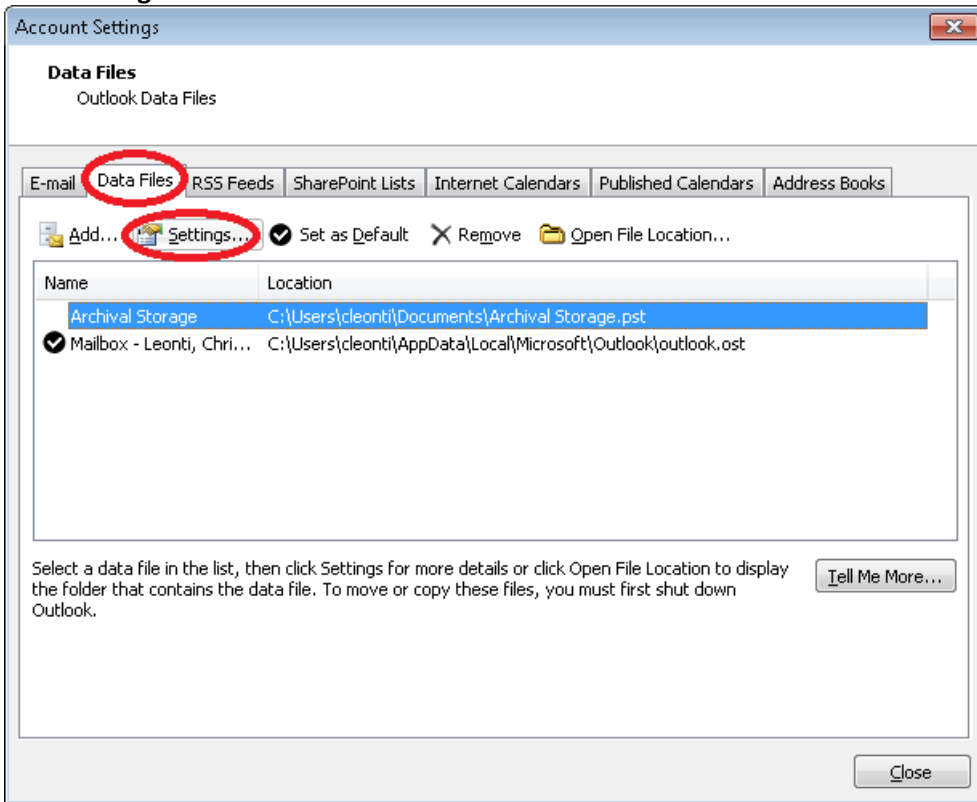
***Backup the PST file before performing compaction
This reduces the chance of losing anything if there is a problem.***

1. Ensure you are in the main Outlook window – not an open e-mail.
2. Click the FILE tab on the Ribbon.
3. Click the **Info** option in the left hand pane of the new window.
4. Click the **Accounts Settings** button.
5. Click **Accounts Settings...** in the new menu.

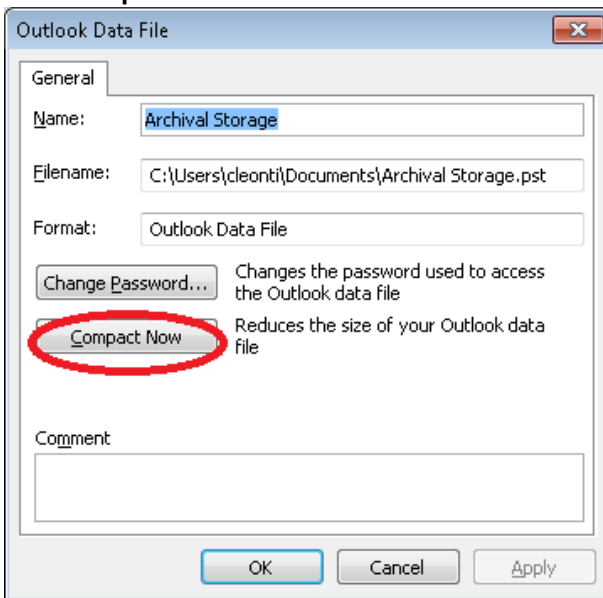


6. Click the **Data Files** tab.
7. Click to select (highlight) your PST file.
 - a) If you have more than one PST file to compact, choose the first one and then repeat steps 7-10 after the first file compaction is complete.

8. Click **Settings**.



9. Click **Compact Now**.



10. After the compacting is complete click **OK**, and then click **Close**.