

Configuring Outlook for Short-term Message Management

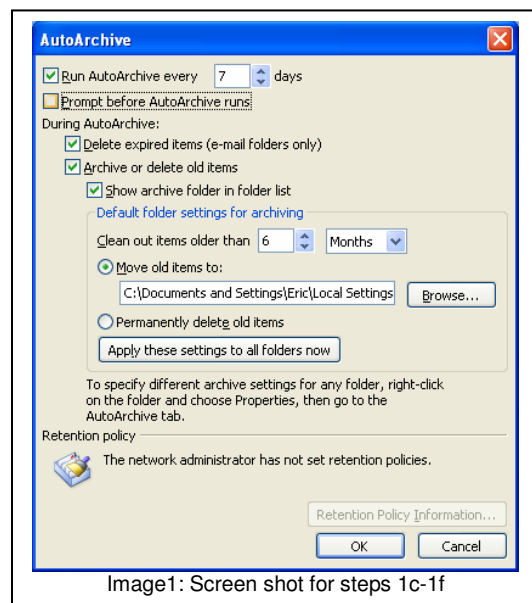
Often the number of email messages coming into a mailbox on a given day is cumbersome to deal with. This often includes regular short term messages (like newsletters, company announcements, and various notifications or alerts). By utilizing a combination of Outlook's own tools, you can automatically process these messages, helping keep your mailbox manageable.

This uses an Outlook rule to move incoming email to a sub-folder in the mailbox. After a set number of days, Outlook cleans up the messages in this folder using the AutoArchive functionality.

1. Setup Auto-Archiving

AutoArchiving processes all mail folders in your mailbox and moves messages over a specific date to an external personal folder (PST). These steps will modify the frequency of the AutoArchiving process so that we can use it later to cleanout our short-term folder.

- a. From Outlook, select **Tools** menu, then **Options**, then the **Other** tab.
- b. Click the **AutoArchive** button
- c. Change **Run AutoArchive every ___ days** to 7. *Note: If you use a different number here, make sure you match the value used in Step 3d.*
- d. Unselect checkbox for **Prompt before AutoArchive runs**. If this option is left selected, Outlook will ask you before running every 7 days.
- e. Select an offline personal folder to move old items to. This folder will contain email from your mailbox that meets the criteria set in the field for **Clean out items older than ___** for all folders in the mailbox (excluding contacts and calendar items).
 - i. Click **Browse**
 - ii. Type in a new name, like *Q1_2007*
 - iii. Click **OK**
- f. Change any other optional settings
- g. Click **OK** to accept settings. Click **OK** to close all windows, until back at Outlook.



2. Create rule to move new messages.

We are going to take advantage of Outlook's internal Rules processing to move new messages as they arrive in the Inbox. **Be careful**, rules will automatically move messages immediately upon arrival. If a generic rule is configured it can move too many messages. Make sure that the rule applies to a specific situation (single sender, specific subject, identical attachment name, etc.).

- a. The easiest way to create this rule is using an existing email messages.
 - i. Select a copy of an existing message in your Inbox, from the **Tools** menu, select **Organize**.
 - ii. Use the wizard for **Move message** and point to an existing, or create a new destination folder.
 - iii. When complete, make sure to select the option move messages now.
- b. If you don't have an existing message you will need to create the rule by hand. This process differs depending on your version of Outlook. These steps are for Outlook 2003, but the steps are similar for older versions of Outlook.
 - i. From Outlook, select **Tools** then **Rules and Alerts**
 - ii. Select the **E-mail Rules** tab

- iii. Click **New Rule** and select **Move messages from someone to a folder** (see Image2)
- iv. Click **Next** and complete the wizard for the email address of the Internal user (you'll need to select their name from your internal Global Address List).
- v. You can use the **Start from a blank rule** to create a similar rule that looks for Internet email addresses.
- vi. Click **OK** to exit the Rules and Alerts section

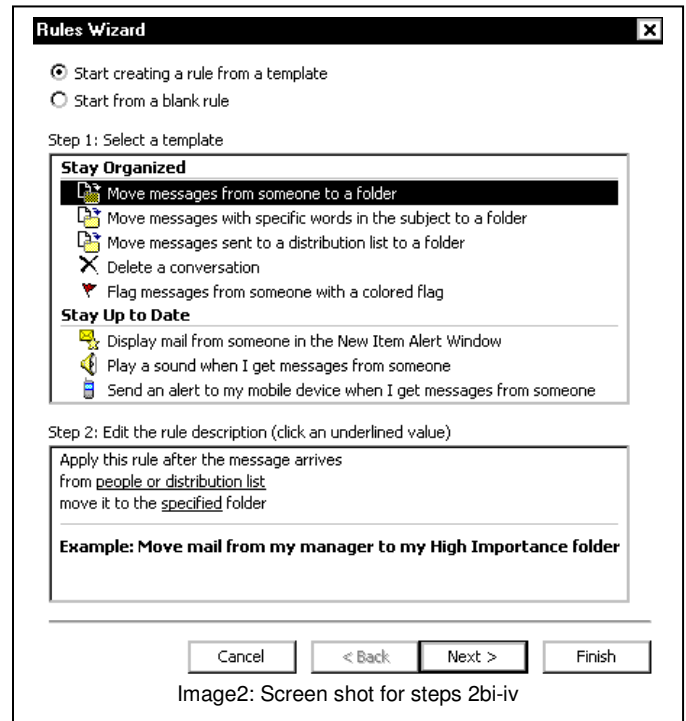


Image2: Screen shot for steps 2bi-iv

3. Configure cleanup

This process will take advantage of the AutoArchive process to delete messages delivered to the short-term folder. This will permanently (or hard) delete the messages, so do not expect them to show up in the Deleted Items folder. Recovery of these messages depends on the Deleted Item Retention settings set by the email administrator(s). If the setting is sufficient, turning on the DumpsterAlwaysOn setting will help with recovery. For the first few days, check this folder regularly to make sure the rule is moving the correct messages here.

- a. Find the folder created in Step 2, right-click the folder and select **Properties** from the pop-up menu. (Or select the folder, Select Folder from the **File** menu, then **Properties for ____ folder.**) (see Image 3)
- b. Click on the AutoArchive tab.
- c. Select the radio button for **Archive this folder using these settings.**
- d. Change the date value on **Clean out items older than ____** to match your value selected in Step 1c.
- e. Select the radio button for **Permanently delete old items.**
- f. Click **OK** to accept these settings.

Final Notes

Now the short-term repository is configured and messages should be moved here automatically. Be careful that the rules don't overlap for the same message. Also, watch the folder for a few days after creating the rule to make sure the correct messages are moved.

Additional folders can be configured with different expiration dates. Just remember, that Outlook is only going to do clean up every 7 days (per Step 1c). So, if you choose a 15 day expiration (in Step 3d), the folder will contain up to 20 days of messages.

Depending on how the rule functions, it may happen only if Outlook is open. Don't be surprised if messages start moving when Outlook is opened first thing in the morning.

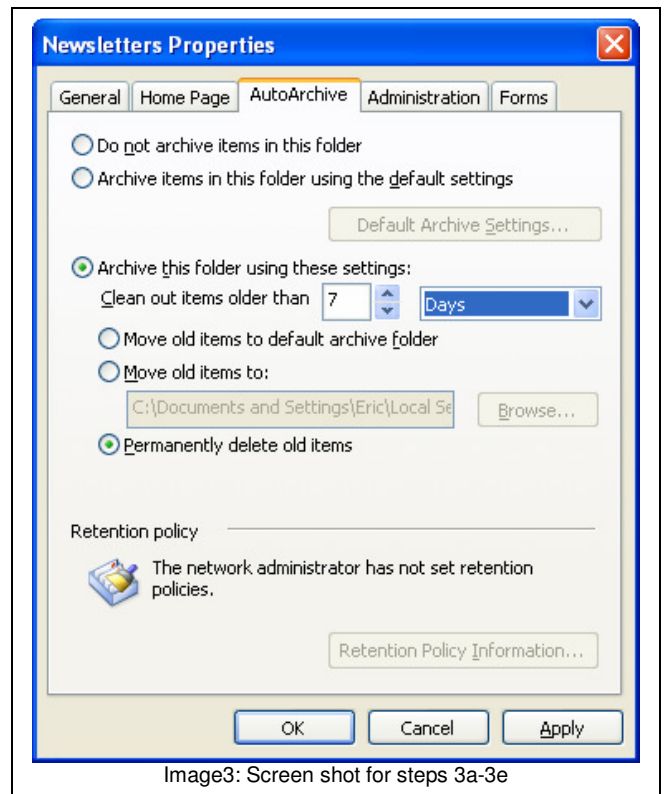


Image3: Screen shot for steps 3a-3e