

### Microsoft® Outlook Navigation Pane – Managing Folders

The **Navigation Pane** (located to the left of the Inbox) displays your list of email folders. The Navigation Pane is divided into two sections (**Favorite Folders** and **All Mail Folders**), and provides quick access to all saved emails. Email correspondence has become the primary method of communicating between clients and business associates. Saving both sent and received emails as a permanent record is standard practice for many businesses.

Due to potential server storage issues, most businesses create limits as to the file size of the mail messages you can keep in your **Inbox**, **Sent Items**, and **Deleted Items** folders (all housed on your server). Apart from archiving files on a regular basis, how can emails be saved without exceeding size limitations?

### Personal Folders

The **Personal Folder** file is a folder structure for saving messages and files. The Personal Folders file is listed under the All Mail Folders in the Navigation Pane and resides on your computer, not the server.

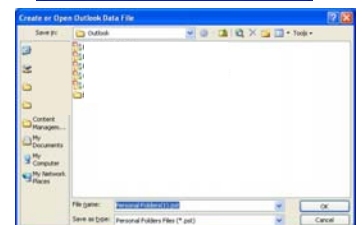
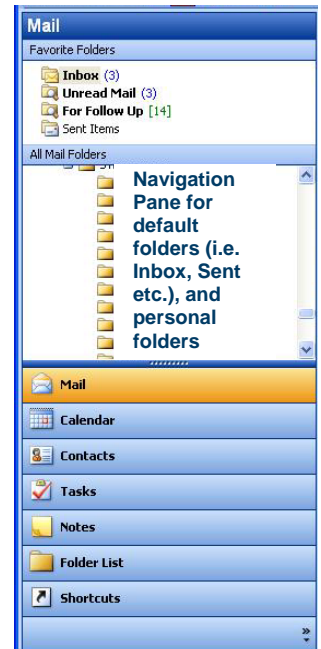
Items in your Personal Folders do not count against any storage limits, but will impact available storage space on your personal computer. The one limitation with Personal Folders is that once emails are moved to a personal folder, they can no longer be accessed remotely or from another computer within the office.

You are not limited to the number of Personal Folders you can create. Like any traditional filing system, Personal Folders are the best method for organizing and categorizing multiple files. A Personal Folders file appears in the Navigation Pane with the default name “Personal Folders”. You can access emails and folders located within your Personal Folder the same you would any other file. You can also delete, save, copy, and move emails to another location on your hard drive or local file server.

### Creating Personal Folders

To create a Personal Folder:

- 1) On the Menu bar select **File>New>Outlook Data File**. The **New Outlook Data File** dialog box appears with one or more storage options to choose from (.pst extensions).
- 2) Click the **OK** button. The **Create or Open Data File** dialog box appears.
- 3) Under **File name**, type a descriptive name for the new file, or leave the default name. Do not change the **Save as type** extension. Outlook automatically creates a .pst extension.
- 4) Click **OK**. The **Create Microsoft Personal Folders** dialog box appears.
- 5) Leave the **File** name (location) as is.
- 6) Under **Name**, type in a descriptive name to identify the new Personal Folders file. This will be the primary folder in your personal folders list. It is recommended that you use the same name as was used in step 3 above.
- 7) Accept the default selection under **Encryption Setting**.



- 8) Though not recommended, if you want to password protect the new file, enter a **Password** and then reenter the password under **Verify Password**.

(**NOTE:** Creating a password is not recommended. If a password is created, you will not be able to access your personal folders unless a password is entered. If the password is forgotten, the file will be permanently locked.)

- 9) Click **OK**.

The newly created folder will appear in the Navigation Pane under **All Mail Folders**. By default, the only subfolder in your newly created folder will be a **Deleted Items** folder.

Now that your personal folder has been created, you can begin to add additional subfolders to organize and store your emails.

(**NOTE:** To add a new folder, rename a folder, delete a folder etc., refer to the section entitled **Folder List**, located on page 3 of the *Microsoft Outlook 2003 Reference Guide*, Volume 1, Number 1.)

## Deleting a Personal Folders File

To remove a Personal Folder from the folder list, right-click the personal folder. From the drop down list of options, select **Close "Personal Folders..."** You will not be provided with a warning. The Personal Folder will be deleted (including any subfolders), and no longer available in Outlook, however, the file still exists on your hard drive or local server and can also be deleted if no longer needed.

## Re-Adding an Existing Personal Folder Back to the Folder List

If you want to retrieve and re-add a deleted folder back to your folder list in Outlook, locate the folder using Windows Explorer.

(**NOTE:** The default location for Windows XP is: C:\Documents and Settings\your username\Local Settings\Application Data\Microsoft\Outlook). Select the folder and click **OK**. The Personal Folders file will appear back on the Folders list.)

## Organizing Emails

### Moving an Email to a Personal Folder

To move an email from one folder to another (i.e., Inbox to a Personal Folder), click on the email message to be moved. The message should now be highlighted. Hold down the left mouse button and drag the message on top of the new folder in the **Navigation Pane**. As you drag the email, you'll notice a small box attached to the bottom of the arrow. The cursor will change to a circle with a diagonal line when you are over an area that doesn't allow you to drag and drop a message. When you have the message over the folder that will store the message, the folder should now be highlighted. Release the mouse button and the email will now be stored in the new folder.

### Moving Multiple Emails

To move multiple messages from one folder to another folder, hold down the Ctrl key and click on each message to be moved. The messages will remain highlighted, as shown by the example on the right. If you accidentally include an email that you don't want to move, simply re-click the email and it will no longer be highlighted.



When you have highlighted the last message to be moved, follow the same process as you would to move one message, by dragging over to the new folder and releasing the mouse. All highlighted emails will now be moved to the new folder.

There's an easier method for multiple emails that are grouped together, click on the first email, hold down the **Shift** key and click on the last email. All grouped emails will be highlighted and are ready to be moved to the new folder.



If you're more comfortable using the Menu bar, click on a message or multiple messages to be moved, select **Edit** from the **Menu** bar, then **Copy** or **Cut**. Click on the new folder, then select **Edit>Paste** to move the email(s) to the new folder.

## Deleting and Recovering Emails

Deleting an email is easy. Simply highlight a message and press the **Delete** key on your keyboard or the **Delete** button located on the toolbar. Deleting multiple messages can be accomplished in the same way as moving messages by highlighting all the messages to be deleted (see Moving Multiple Emails), and then pressing the **Delete** key.



Messages to be deleted can also be dragged to the **Deleted Items** folder “trash can” where all deleted items are stored. If you accidentally delete a message, the message can be recovered by opening the **Deleted Items** folder, locating the email, and dragging it back to the folder where it was originally located.

(**NOTE:** If an email has an attachment that you want to save, open and save the attachment(s) before deleting the email.)

## Permanently Deleting Emails

Periodically emptying the Deleted Items “trash can” is a good idea since deleted items are stored on the server until they are emptied. When you are ready to empty the Deleted Items “trash can”, you can select all of the items by pressing **Ctrl+A** on your keyboard, or by selecting **Edit** from the **Menu** bar>**Select All>Delete** on your keyboard. An Alert box will appear asking: **Are you are sure that you want to permanently delete the selected item(s)?**

(**NOTE:** Deleting an item(s) from the Deleted Items folder is permanent and cannot be recovered.)

### Quick Tip

#### Empty Deleted Items Folder Every Time You Log Off Your Computer

- Choose **Tools>Options**
- Click on the **Other** tab
- Click on the **Empty the Deleted Items folder upon exiting** check box

**NOTE:** Emptying the Deleted Items folder is permanent.

## Saving Emails and/or Attachments

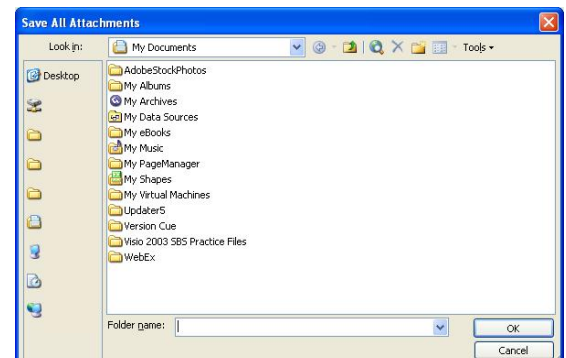
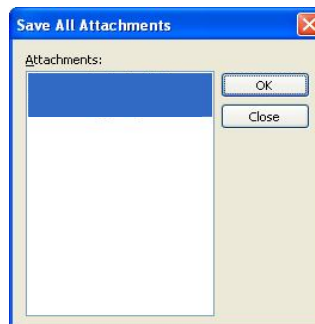
Attachments are saved within messages (both incoming and outgoing messages). When you receive an email with an attachment, you will normally see a small paperclip next to the message in the Inbox. Large attachments contained within saved and sent emails can quickly use up available server space. From an organizational and file management perspective, it's a good idea to transfer and save any attached documents to your computer or network drive.

### Save an Attachment

- Open the email containing the attachment.
- Right-click on the attachment.
- Click **Save As**, and save the document in the appropriate folder on your computer or network drive.

### Save Multiple Attachments

- Open the email containing the attachments.
- From the Menu bar, select **File>Save Attachments**.
- A **Save All Attachments** dialog box appears listing all of the attachments. All of the attachments are highlighted.
- Click **OK**.
- A second **Save All Attachments** dialog box opens, allowing you to save the document(s) to the location and folder of your choice. Locate and click on the appropriate folder.
- Click **OK**.



## Save Messages / Delete Attachments

Once the attachments have been saved to your computer, you can now save the email and delete the attachment(s) from your email. To delete the attachment:

- Open the email.
- Right click on the attachment name or icon.
- From the drop down menu, select **Remove**.
- Before you close the email, a dialog box will appear with the following question: **Do you want to save changes?** providing one last chance to undo the removal by clicking the **No** button, or **Yes**, if want to proceed with the deletion.
- Selecting **Yes** will **permanently** delete the attachment.
- The email message (minus the attachment) can now be saved in the appropriate folder in Outlook, taking up much less space.

### Quick Tip

#### File Size

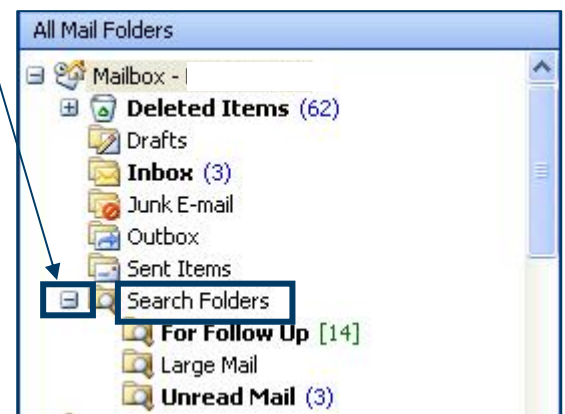
If you forward an email (with attachments), remember to delete the email from your **Sent** file. If you don't, you're occupying twice the space.

A 4KB email with a 2MB attachment becomes 4.008MB of used space – 2.002MB in your Inbox and 2.002MB in your Sent folder.

## Large Mail

For your convenience, Outlook provides a folder for “large” emails called the **Large Mail** folder. The Large Mail folder is accessible through the Navigation Pane under **Search Folders**.

You may have to expand the Search Folders icon to view all folders in the Search Folders list. The Large Mail folder lists all emails 100 kilobytes (KB) or larger. There is also a column identifying where the emails are located.



## Keyboard Shortcuts

Keyboard Shortcuts:	
Create New Email	Ctrl+N
Move to top of Inbox	Home
Move to bottom of Inbox	End
Move cursor to top of new message	Ctrl+Home
Move cursor to end of new email message	Ctrl+End
Move cursor to Menu Bar	F10
Toggle between Inbox and Navigation Pane	F6
Move directly to Inbox	Ctrl+Shift+I
Move directly to Outbox	Ctrl+Shift+O