CHAPTER

# 3

# MANAGING OUTLOOK FOLDERS

## In this chapter

# UNDERSTANDING HOW OUTLOOK STORES INFORMATION

Email has become one of the most popular communication mediums for its ease of use and almost instantaneous delivery. The rapid growth of email has lead to a new phenomenon: email glut. You can easily become overloaded with information and not be able to find any of it. The medium that was supposed to make you more efficient and save time can turn against you if you don't manage it effectively. This chapter introduces you to the basics of storing Outlook information and teaches you how to manage that information so that email becomes a time saver instead of a time waster. You'll learn how to navigate in Outlook's new interface, create folders, move and copy information between folders, and manipulate folder properties to fine-tune your folders.

## WHERE DOES OUTLOOK STORE INFORMATION?

Outlook stores information in folders. These folders aren't the same types of folders that you use in Windows to store documents, spreadsheets, and pictures. These folders are stored either on an Exchange Server or in the file system within a Personal Folders file. If you're not using an Exchange Server, your Outlook data is always stored in a Personal Folders file. This file has the file extension `.pst` and can be stored on your local machine or on a network share. A Personal Folders file isn't quite the same as a Word document or Excel spreadsheet. It stores all your Outlook folders, email messages, calendar entries, contacts, tasks, journal items, and notes within its structure.

## USING A PERSONAL FOLDERS FILE

You'll use a Personal Folders file whenever you don't store your email on an Exchange Server. If you use Outlook to access POP3, IMAP4, or HTTP accounts, you'll use a Personal Folders file. However, even if you use Outlook to access an Exchange account, in some circumstances you'll still use a Personal Folders file.

If you don't know whether you're using a Microsoft Exchange Server or a Personal Folders file, you can check your default delivery location. Select Tools, Account Settings to display the Account Settings dialog box (see Figure 3.1).

If you see the words *Personal Folders* beside the Change Folder button, you are using a Personal Folders file. The Account types IMAP, POP, and HTTP use a Personal Folders file as their default storage location.

If you're using an Exchange Server, you can still specify your delivery location to be your Personal Folders file, but doing so will remove all Outlook items from the server.

**CAUTION**

> Check with your system administrator before changing your default delivery location from your Exchange Server to a Personal Folders file. Doing this can prevent some server-side content scanners and antivirus products from scanning your email. It can also prevent you from viewing your messages using Outlook Web Access.

**Figure 3.1**
A POP3 account uses a Personal Folders file as its default delivery location.
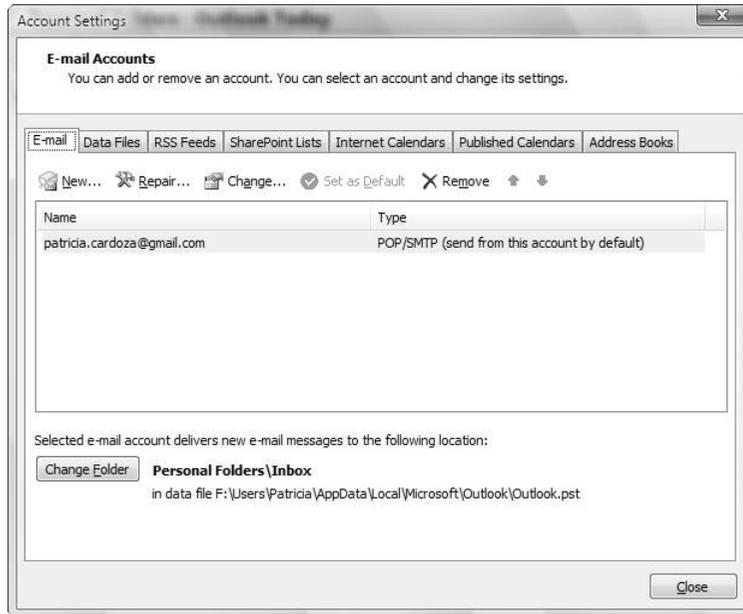


By default, your Personal Folders file contains the following folders:

- **Calendar**—Stores meeting requests, appointments, and events.
- **Contacts**—Stores contacts and distribution lists.
- **Deleted Items**—Stores items that have been deleted from all other Outlook folders.
- **Drafts**—Stores items that are in process. You can compose an email message and save it to Drafts if you want to come back to it and work on it later.
- **Inbox**—Stores all received email.
- **Junk E-mail**—Stores all email Outlook marks as junk.
- **Journal**—Stores various types of journal entries.
- **Notes**—Stores items that operate much like a sticky note.
- **Outbox**—Stores messages that have been queued for sending.
- **Sent Items**—Stores all sent email.
- **Tasks**—Stores tasks and task requests.

Outlook's user interface is designed to show you only the types of items you're interested in based on the type of folder you choose. When you select Mail in the Navigation Pane, Outlook shows only folders that contain mail items in the folder list (see Figure 3.2). Those folders are Deleted Items, Drafts, Inbox, Junk E-mail, Outbox, and Sent Items, as well as any custom mail folders you've created and any Search folders. You can select other types of folders, such as Calendar, Tasks, or Contacts, by clicking their banners in the Navigation Pane.

Outlook's default Navigation Pane displays banners for Mail, Calendar, Contacts, and Tasks. Below the banners, you'll find buttons for Notes, the Folder List, and Shortcuts. By default,

the Journal icon is hidden. Click the Configure Buttons icon at the bottom right of the Navigation Pane (it looks like a small down arrow) and then select <u>A</u>dd or Remove Buttons to control the look of your Navigation Pane.

**Figure 3.2**
This window shows a Personal Folders mail view.
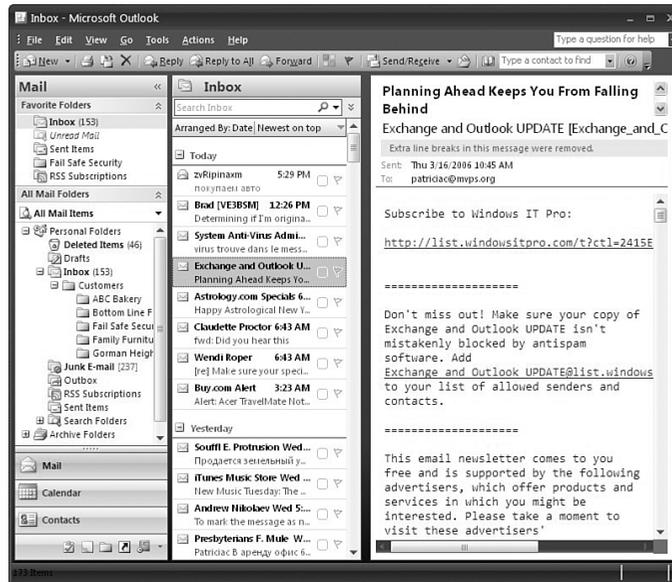


## USING EXCHANGE SERVER

If you're part of a large corporate network, you might use a Microsoft Exchange Server to store your mail. An Exchange Server offers several benefits. It serves as a central location for all messaging items, it's usually backed up on a regular schedule, and it can provide the capability to share Outlook folders with other individuals on the Exchange Server. An Exchange Server also offers a public folder message store that's accessible to anyone who has an account on the Exchange Server as well as a Global Address List.

As you saw in Figure 3.1, you can check your Account Settings to determine whether your emails are stored on the Exchange Server. If your account type is Microsoft Exchange, you're using an Exchange Server. Otherwise, you're using a Personal Folders file.

## STORAGE LIMITS

The growth and availability of high-speed Internet access and popularity of digital cameras have greatly increased the amount of data people want to store in their email. When Aunt Irma gets her new digital camera and sends you daily pictures of her cat, you can easily consume multiple megabytes' worth of space in your Personal Folders file or Exchange mailbox. PowerPoint presentations may be more than 50MB if they contain a large number of pictures. To keep email access relatively quick and keep network administrators happy, both Personal Folders files and Exchange mailboxes can have storage limits.

In older versions of Outlook, prior to 2003, the size limit for a Personal Folders file was 2GB. Outlook 2002 introduced a warning message when a Personal Folders file reached 1.82GB in size, informing users that if they didn't immediately clean up their folder, they would likely lose data.

**N O T E**

> Although the official limit for a Personal Folders file was 2GB, the functional limit was actually 1.82GB. A Personal Folders file that grew much beyond 1.82GB would cease to function.

*If you can no longer access your Personal Folders file, see "Errors in Personal Folders Files" in the "Troubleshooting" section at the end of the chapter.*

Outlook 2007 supports the same two Personal Folders file formats as Microsoft Outlook 2003. The standard format is an Office Outlook Personal Folders file that supports multilingual Unicode data. This type of Personal Folders file can grow to around 33TB (yes, that's terabytes). The legacy Personal Folders file format compatible with Outlook 97–2002 still has a size limit of 2GB.

**T I P**

> Even though the storage limit is large for the standard Personal Folders file, it still isn't wise to store very large amounts of data in one Personal Folders file. After a Personal Folders file grows to around 10GB, Outlook usually starts to run very slowly. I recommend keeping most Personal Folders files under 5GB to keep Outlook running smoothly.

Versions of Outlook prior to 2003 cannot access the standard Outlook 2007 Personal Folders file. If you need to share data between Outlook 2007 and a version of Outlook prior to 2003, be sure to store your data in an Outlook 97–2002 compatible Personal Folders file.

When creating a new Personal Folders file, your system administrator might dictate the maximum allowable size. For example, when your system administrator performs an administrative installation of Outlook 2007, the default size limit for a Personal Folders file is 10GB. The system administrator can change this size limit.

## OTHER STORAGE LOCATIONS

In addition to storing Outlook items in a Personal Folders file, Outlook uses several other locations to store information. Some information, such as Most Recently Used (MRU) lists for meeting locations and files, is stored in the Windows Registry. Other Outlook information, such as exported rules and toolbar customizations, is stored in files found on your hard drive.

➜ For more information on rule storage, **see** "Creating Rules," **p. 652**.

➜ For more information about toolbar customizations, **see** "Customizing Command Bars," **p. 122**.

➜ For more information about Outlook and the Windows Registry, **see** "Outlook's Files, Folders, and Registry Keys," **p. 915**.
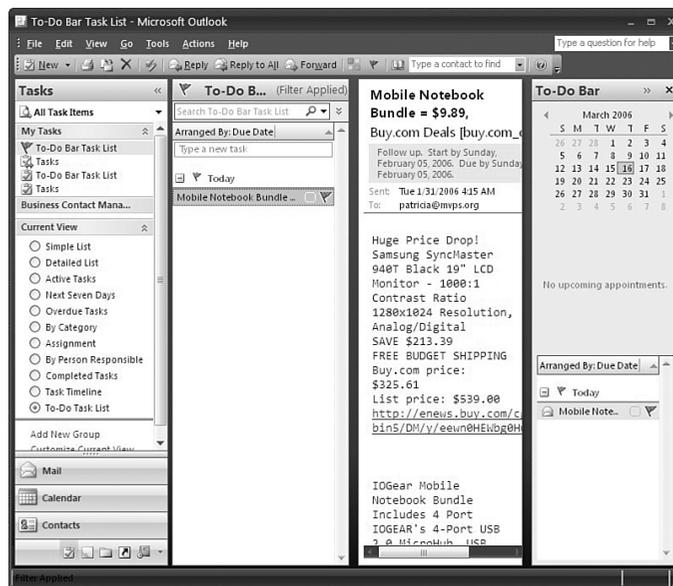
# USING THE NAVIGATION PANE AND FOLDER LIST

Outlook 2007's Navigation Pane (see Figure 3.3) provides quick access to all of your Outlook items.

**NOTE**

It's interesting to note that the original name of the Navigation Pane was the WunderBar (pronounced *voon-der-bar*). It really is a wonder bar of sorts, allowing you to access all of your Outlook information through the buttons on the Outlook shortcut bar and to display folder-specific information in the rest of the pane.

**Figure 3.3**
The Navigation Pane's Task view displays your task folders and enables you to select different views.

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The Navigation Pane contains different content panes that you can use to view different types of Outlook folders, the Outlook Folder list, and the Shortcuts area. Each content pane contains different user interface elements based on what you are likely to need in that particular view. The eight content panes and their included sections are

- **Mail**—This pane contains two sections by default: the Favorite Folders list and the All Mail Folders section. You can also customize the Mail pane to include a Current View section.

- **Calendar**—This pane contains the date navigator and a section that displays other Calendar folders you can access. You can also customize the Calendar pane to display a Current View section.

- **Contacts**—This pane contains a section that displays a clickable list of your available Contacts folders, a section for Contacts folders in public folders or other users' mailboxes, and a Current View section.

■ **Tasks**—This pane contains a clickable list of your available Tasks folders and a Current View section.

■ **Notes**—This pane contains a clickable list of your available Notes folders and a Current View section.

■ **Folder List**—This pane shows you a hierarchical list of all of your Outlook folders, including special folders such as Sync Issues, Local Failures, Conflicts, and Public Folders.

■ **Shortcuts**—This pane contains a section for shortcuts to Outlook folders, files stored on your computer or an intranet, programs, and web pages.

■ **Journal**—This pane isn't accessible by default in Outlook 2007. However, you can click the Configure Buttons shortcut on the Navigation Pane and add the Journal to the Navigation Pane view. The Journal pane contains a clickable list of your available Journal folders and a Current View section.

## CONFIGURING THE NAVIGATION PANE OPTIONS

The Navigation Pane contains buttons for each type of Outlook folder. By default, when you first install Outlook, the following buttons are visible on the Navigation Pane:

■ Mail

■ Calendar

■ Contacts

■ Tasks

Below those four buttons is another strip containing the following icons:

■ Notes

■ Folder List

■ Shortcuts

■ Journal

■ Configure Buttons

You can change the size of the button container by positioning your mouse on the solid light blue border on top of the container. When your mouse pointer changes to a double-headed arrow, click and drag the container up or down. As you change the size, you change which sections are visible as horizontal buttons and which are visible only as icons. On a high-screen resolution, you can actually display all the buttons horizontally with their names and icons.

To access the Navigation Pane Options dialog box shown in Figure 3.4, you can either right-click one of the Navigation Pane buttons or click the button on the bottom right of the Navigation Pane. Select Navigation Pane Options to choose which buttons appear on the Navigation Pane and in what order they are listed. For example, if you rarely use the

Tasks folder, you might want to remove it from the Navigation Pane to make the Journal more easily accessible. You can also click the Reset button to return the Navigation Pane to its default configuration.

**Figure 3.4**
You can set which shortcuts are visible as banners or buttons on the Navigation Pane.



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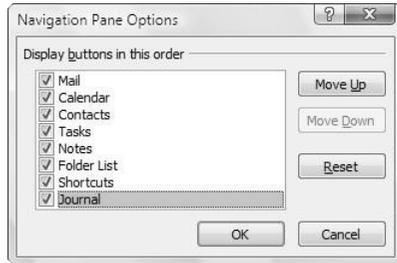
## USING THE FAVORITE FOLDERS LIST

The top section of the Navigation Pane contains a section for your favorite folders. The average Outlook user has at least 10 user-created folders. When viewing the Navigation Pane in Mail view, you might not be able to see all of your mail folders at once. That's where the Favorite Folders list comes in. You probably have 3 or 4 folders that you use all the time. Add those folders to your Favorite Folders list for quick and easy access.

To add a folder to your Favorite Folders list, right-click the folder and select Add to Favorite Folders. By default, the Favorite Folder list contains the Inbox, Sent Items, and a search folder for Unread Mail. You can remove any of these folders from the Favorite Folders list by right-clicking the folder and selecting Remove from Favorite Folders. Figure 3.5 shows the Favorite Folders list with several new folders.

**Figure 3.5**
The Favorite Folders list offers quick access to commonly used folders.
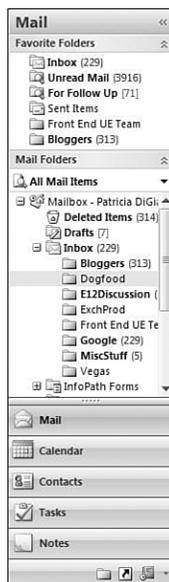
**NEW** The Favorite Folders list will grow in size to accommodate all the folders you add. If you remove folders from the Favorite Folders list, it will shrink. You cannot completely remove the Favorite Folders list from your Navigation Pane, but you can collapse it. Click the double downward arrows on the right of the Favorite Folders list or click the heading Favorite Folders to collapse the list. You can expand the list at any time by clicking on the heading Favorite Folders.

## USING THE MAIL VIEW VERSUS THE FOLDER LIST

Prior to Outlook 2003, all folders were displayed in the folder list. Outlook 2007 still has this feature, but the standard view of the Navigation Pane is the Mail view. When you select Mail from the Navigation Pane, the middle section of the Navigation Pane contains a listing of all mail folders. Non-mail folders such as Calendar, Contacts, Journal, Notes, and Tasks aren't shown in this view. This change was made so that users could more quickly navigate to the type of information they need. You can still display your folder list at any time by clicking on the folder list icon at the bottom of the Navigation Pane. This action removes the Favorite Folders section from the Navigation Pane and displays your entire folder list, as shown in Figure 3.6.

**3**

**Figure 3.6**
The Folder List view shows you all types of Outlook folders.
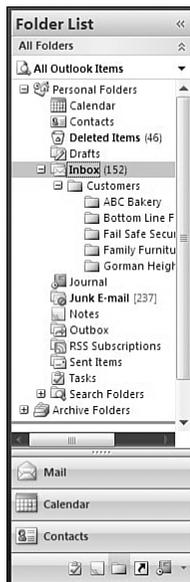


**T I P**

> If you're a big fan of the folder list, you can turn it on any time by clicking the Folder List icon. Unlike selecting the other icons in the Navigation Pane, selecting the folder list does not change your current Outlook folder. It just replaces Mail View with the Folder list view. This change is persisted if you exit Outlook and reopen it. Unfortunately, after you click on another button on the Navigation Pane, your folder list disappears and you have to open it again.

## USING MY SHORTCUTS

The last component of the new Navigation Pane is the Shortcuts area. You can view short-cuts by selecting the Shortcuts button on the bottom of the Navigation Pane, as shown in Figure 3.7.

**Figure 3.7**
The Shortcuts pane enables you to create shortcuts to Outlook folders, Office docu-ments, or other programs.



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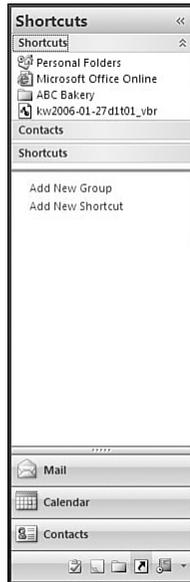
Outlook ships with one default shortcut group, Shortcuts, but you can add additional groups by clicking the Add New Group hyperlink. This adds a new group to the bottom of the list. You can rename this new group by right-clicking it and selecting Rename Group. You can add an Outlook folder to the default Shortcuts group or to your new group with the follow-ing steps:

1. Click Add New Shortcut to display the Add to Navigation Pane dialog box, shown in Figure 3.8.
2. Either select a folder from the Folder drop-down box or use the folder tree to choose a folder.
3. Click OK to add a shortcut to the default Shortcuts group.

After adding a folder to a group, you can drag it to other groups. To remove a shortcut, right-click the shortcut and choose Delete Shortcut. Outlook will ask you whether you really want to remove the shortcut. If you choose Yes, the shortcut is removed.

In addition to adding and removing shortcuts, you can change the order in which the short-cuts are displayed. To move a shortcut up or down in a group, right-click the shortcut and select either Move Up in List or Move Down in List. You can also drag and drop the shortcut up or down in the list or between groups.
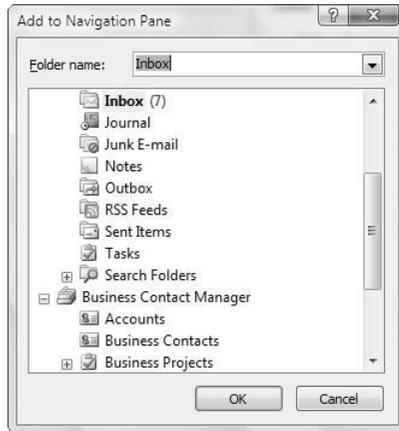
If you want to remove an entire group, right-click the group and select Remove Group.

You can also add shortcuts to Windows files or even other programs to the Shortcuts area. To add a shortcut in the Shortcuts area, use the following steps:

**1.** Open the folder that contains the Windows file, folder, or program you want to add to your Shortcuts area.

**2.** Shrink the Outlook window so that you can view both the Shortcuts area and the Windows file you need at the same time.

**3.** Drag and drop the Windows file, folder, or program executable to the shortcut group.

## USING OTHER NAVIGATION PANE COMPONENTS

The other components of the Navigation Pane are visible only when you're viewing other folders. Selecting the Calendar button on the Navigation Pane displays the Calendar folder with its own Navigation Pane, as shown in Figure 3.9.

The top component of the Calendar Navigation Pane contains the date navigator. Use the date navigator to change the date you're currently viewing in your calendar.

The middle section of the Navigation Pane contains a listing of all the Calendar folders in your default message store (either a Personal Folders file or an Exchange mailbox), Calendar folders in any other Personal Folders file you have open within Outlook, as well as any Calendar folders you're sharing from other users. In Figure 3.9, two Calendar folders are available in the My Calendars section. You can choose to display as many Calendar folders as you want. Figure 3.10 shows two Calendar folders displayed in the same window. The tabs at the top of each folder tell you which folder is which. This functionality can be helpful if you're managing a team. Simply add all team members' calendars to your view, and you can see what everyone is working on at once.

**Figure 3.9**
The Calendar Navigation Pane displays the date navigator and a list of your Calendar folders.
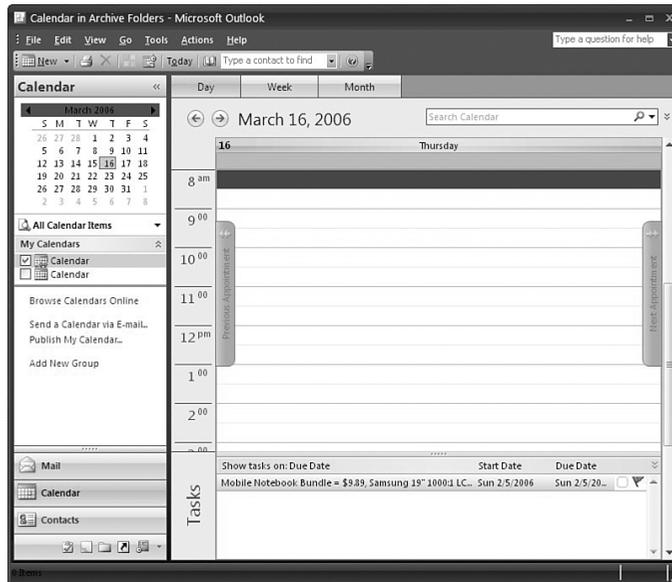


**Figure 3.10**
You can display multiple Outlook calendars side by side.
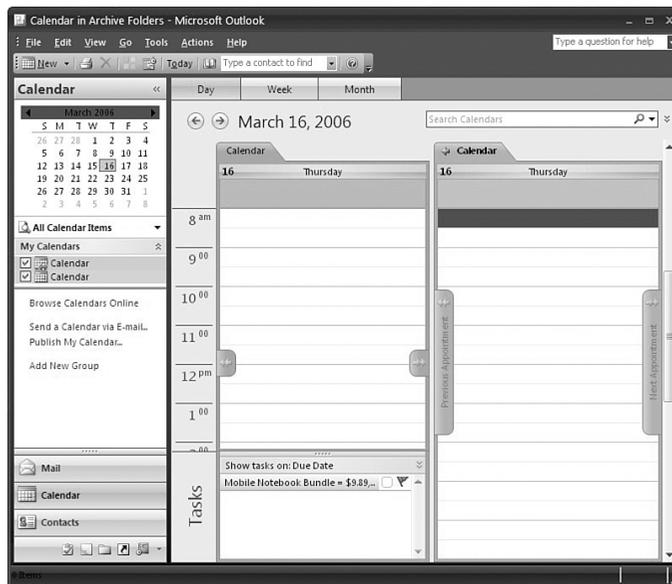


Selecting any other folder button, such as Contacts, Tasks, Journal, or Notes, from the Navigation Pane displays one additional section: the Current View section (see Figure 3.11). This section displays all the available views for the folder and enables you to change views by selecting the option button next to the view you want. At the bottom of the Current View section is a links section that enables you to open a shared folder, share your folder, or customize the current view.
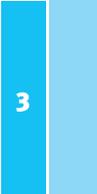
**Figure 3.11**
The Current View section of the Navigation Pane enables you to switch the folder's view with a single mouse click.
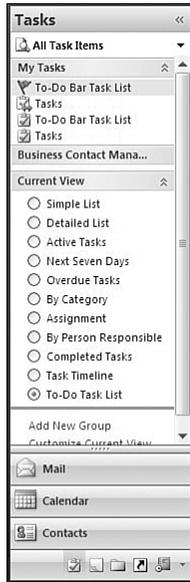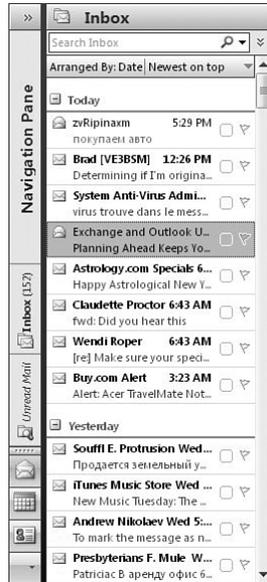


## COLLAPSING THE NAVIGATION PANE

Outlook 2007's Navigation Pane offers two enhancements over Outlook 2003. First, every section of the Navigation Pane is either collapsible or resizable. To collapse a section of the Navigation Pane, click the two small up arrows on the right side of any navigation pane section. Figure 3.12 shows the Mail view of the Navigation Pane with the All Mail Folders section collapsed.

**Figure 3.12**
You can collapse most of the sections of the Navigation Pane.

In addition to collapsing sections of the Navigation Pane, you can also hide it almost completely. Click the double left arrows at the top of the Navigation Pane to collapse the pane to the left of the screen, as shown in Figure 3.13.

**Figure 3.13**
You can collapse the Navigation Pane to the left side of the screen.



**3**

**TIP**

> You can also collapse the Navigation Pane through the View menu. Select View, Navigation Pane, Collapsed. To return the Navigation Pane to its normal state, select View, Navigation Pane, Normal.

Even when the Navigation Pane is collapsed to the left, you can still access any of the shortcut buttons. If you want to expand the Navigation Pane, you have two options. You can click on the words *Navigation Pane* to display the Favorite Folders and All Mail Folders of the pane (if you're in Mail view). These sections will hover over your messages, allowing you to choose a folder. After you've chosen a folder, they will collapse again. To expand the Navigation Pane to its original state, click on the double right arrows on top of the Navigation Pane.

You can also turn the Navigation Pane off completely. To do this, press Alt+F1 on the keyboard or select View, Navigation Pane, Off.

## USING AND MANAGING FOLDERS

The Navigation Pane, along with the folder list, enables you to manage all your Outlook folders.

## OPENING A FOLDER

Opening a folder is simple: You click on the folder name, and the folder opens in Outlook's center pane. As with anything Microsoft, there's another way of opening a folder: You can right-click on the name of a folder and select Open from the context menu. However, there's not much use for that option because it does the same thing as clicking on the folder but requires an extra mouse click.

There's a third way to open an Outlook folder that isn't so redundant. You can open Outlook and go directly to a particular folder by using a command-line switch. Typing the following line at a command prompt opens Outlook with the Tasks folder displayed:

```
Outlook.exe /select Outlook:Tasks
```

You can use this syntax with the name of any Outlook folder. You can use a shortcut such as this if you want to immediately open Outlook to a specific folder. Although this might not often be necessary—after all, you can just click on the folder—it's nice to have a shortcut on your desktop to immediately launch a specific folder. This functionality can be especially helpful if you want to quickly navigate to a folder that's buried deep within the folder tree.

## OPENING A FOLDER IN A NEW WINDOW

Opening a folder in a new window can help you work more efficiently in Outlook. If you're currently scrolling through a long message in your Inbox and need to access the Calendar folder, when you return to the Inbox, the message you were originally reading has scrolled back to the beginning. You have to scroll through the message again to find your place. This can sometimes be a hassle and cause you to read the same parts of a message many times. The solution is to open subsequent folders in a new window. You can right-click on any folder to display the context menu shown in Figure 3.14.

**Figure 3.14**
This context menu shows options for the ABC Bakery folder.
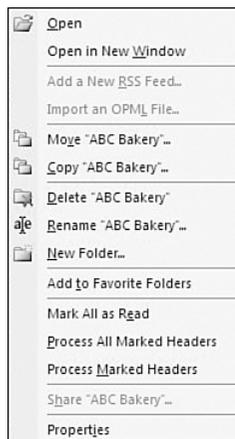
Select Open in New Window to open the selected folder in another Outlook window.

## CREATING A FOLDER

You can create multiple Outlook folders to store and file information. To create a new folder, use these steps:

1. Click the File menu and select New, Folder to display the Create New Folder dialog box (see Figure 3.15).

**Figure 3.15**
Create a new Outlook folder by entering a name, selecting folder contents, and choosing a location for the folder.
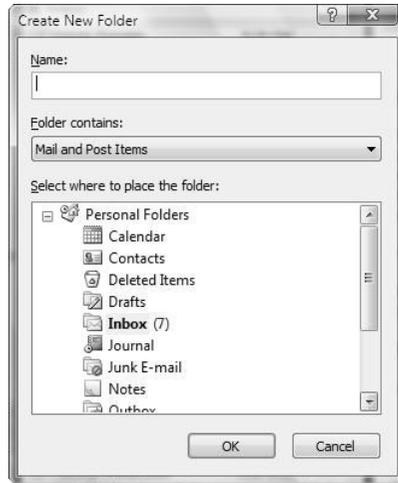


2. Enter a name for your new folder in the Name text box.
3. Use the Folder Contains drop-down list to select the types of items you want to store in this folder. You can select from any of Outlook's default item types.
4. Use the folder list displayed in the Select Where to Place the Folder box to choose the new folder's location. If you want the folder to appear as a subfolder under an existing folder, select that existing folder. Otherwise, select the top-level folder if you want the folder to appear in alphabetical order with the rest of your default folders.
5. Click OK to save your changes.

My folder list now contains a new folder called Urban Flood Control Project. Figure 3.16 shows a typical folder list with a user-created folder.
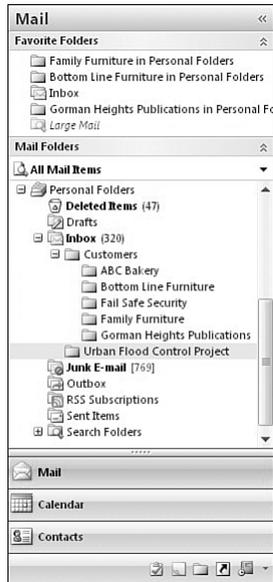
You can use the preceding steps to create as many new folders as you need.

**T I P**

You can also create a new folder by right-clicking on any Outlook folder and selecting New Folder.

**Figure 3.16**
After you create several new folders, your folder list might look something like this.

## MOVING AND COPYING FOLDERS

After you've created additional folders, you might find that your initial folder organization scheme just doesn't quite work for you anymore. If you need to move a folder you created, simply drag and drop that folder from its original location to a new location. You cannot move your default folders, only those folders you have created.

Alternatively, you can right-click on the folder you want to move and select Mo*v*e *<foldername>* to display the Move Folder dialog box (see Figure 3.17). Select the new location for your folder and click OK.

**Figure 3.17**
The Move Folder dialog box displays your folder list and enables you to choose a location.



You can create a new folder from this dialog box as well by clicking the *N*ew button. For example, from this dialog box, you can create a new parent folder to move your existing folder into.

Copying a folder is a good way to share information between two individuals. You can copy an existing folder by right-clicking on the folder name and selecting Copy *<foldername>* from the context menu. The Copy Folder dialog box is identical to the Move Folder dialog box except that selecting a folder here creates an exact duplicate of your folder in another location. Click OK to copy your folder to its new location. To share a folder in this manner, copy the folder to a new Personal Folders file and place that Personal Folders file on a network share.

**N O T E**

> Two users cannot access the same Personal Folders file at the same time. One user must close Outlook or close the Personal Folders file before the other can access that same file.

## DELETING A FOLDER

If you decide that you no longer need a folder you created, you can delete it. Right-click the folder and select Delete *<foldername>* from the context menu. Outlook asks you to confirm that you want to delete the folder and all its contents. If you click Yes, the folder and all messages are moved to the Deleted Items folder. They will be permanently deleted when you empty the Deleted Items folder.

**T I P**

> The Deleted Items folder exists as one extra double-check that you really do want to delete Outlook items or folders. Some people have a habit of using the Deleted Items folder for storage. That isn't a very good idea. Create folders if you need to file your Outlook items. You can even create a folder named Pending Delete for those items that you think you won't need any more but you're just not ready to get rid of yet.

## RENAMING A FOLDER

If you want to rename a folder, right-click it and select Rename *<foldername>* from the context menu. Then just type a new name and press Enter to commit your changes. You can't rename any of Outlook's default folders, only those folders you've created.

# UNDERSTANDING FOLDER PROPERTIES

Every folder has a variety of properties that you can configure to make Outlook work for you. You can examine the folder size, configure permissions (if you're connected to an Exchange Server), and change the folder's initial view.

## CONFIGURING PROPERTIES OF A PERSONAL FOLDERS FILE

Every Personal Folders file has the same basic property options. To display these options, right-click the name of the Personal Folder and select Properties from the context menu to display the Personal Folders file properties dialog box, as shown in Figure 3.18.

**Figure 3.18**
This example shows my Personal Folder properties dialog box.
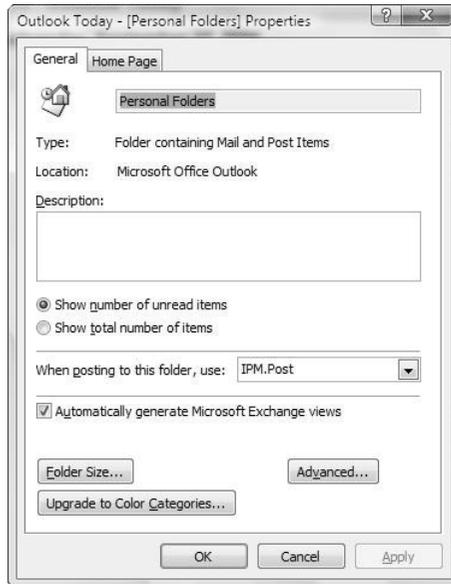


You might notice that one of your Outlook folders has a different icon next to its name. The icon of a house and clock indicates that the Personal Folder you're viewing is the default delivery location for your email. This icon will be visible only on the top-level folder in the folder tree. Your Personal Folders file contains other folders, but the top-level folder can store items. Because of that, it has some of the same properties as other Outlook folders. You can select whether to display the total number of items or the number of unread items, and you can specify the default form used to post information to the top-level folder. You can also use this tab of the properties dialog box to enter a 255-character description of your Personal Folders file.

One last option is available from the General tab of the properties dialog box. Selecting the check box marked Automatically Generate Microsoft Exchange Views means that if you create a custom view for that folder and you're using Microsoft Exchange Server, the custom view settings will be available on the Exchange Server. This setting does not have much relevance for a Personal Folders file.

➔ There is one other option you might see if you have upgraded from Outlook 2003 or earlier—the option to Upgrade to Color Categories. This option is available if you have follow up flags on items without color categories assigned to them. For more information about upgrading to color categories, see "Creating and Using Categories," **p. 145**.

Although it might look as though you can rename your Personal Folders file from this dialog box, you actually must go through one additional step to rename your Personal Folders file. Click the Advanced button to display the Personal Folders dialog box (see Figure 3.19).

**Figure 3.19**
In this dialog box, you can change the name of your Personal Folders file.
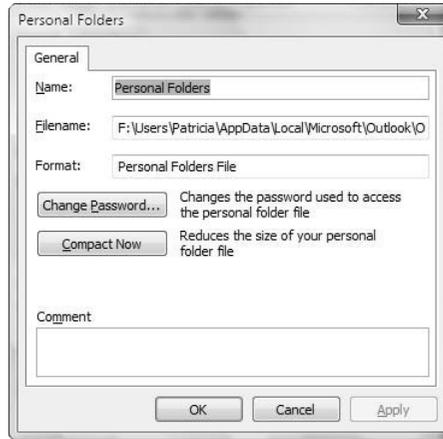


This dialog box enables you to change the name of the Personal Folders file and view the file location and format of this file, as well as a comment field. You can change the password associated with the Personal Folders file (or add one if none exists) and compact the file. A Personal Folders file can grow very large if not regularly compacted. When you delete items from a folder in a Personal Folders file, the space those items once occupied isn't reclaimed automatically. So, a Personal Folders file can end up with a lot of empty space over time. Compacting the file on a regular basis can save space and keep Outlook working as quickly as possible. Click OK on this tab to return to the Personal Folders properties dialog box.

**TIP**

Outlook performs automatic compacting when your machine is idle. However, it's still a good idea to keep an eye on your folder size and do a manual compact operation once in a while.

One other tab is associated with a Personal Folders file: the Home Page tab. Every Outlook folder can have a home page associated with it. You can choose to display this home page when viewing the folder instead of the contents of the folder. If your Personal Folders file is your default delivery location, your home page should be set to `res://C:\Program Files\ Microsoft Office\OFFICE12\1033\outlwvw.dll/outlook.htm`. This is the location of the Outlook Today file.

**NOTE**

The actual name of the Outlook Today file changes based on the Outlook Today style you've chosen. If your Outlook Today home page is slightly different, you've probably customized your style.

## Configuring Properties of an Exchange Message Store

If your default delivery location is your Exchange Server, you can still use the properties dialog box to view and edit properties, although some of your options will change.

The properties dialog box of an Exchange Server mailbox is shown in Figure 3.20.

**Figure 3.20**
The Mailbox properties dialog box for an Exchange mailbox has an additional tab labeled Permissions.

Most of the options are the same as the default Personal Folders properties. However, clicking the Advanced button displays the Microsoft Exchange Server dialog box (see Figure 3.21).

**Figure 3.21**
The advanced properties of an Exchange Server mailbox provide another five tabs to configure additional functionality.
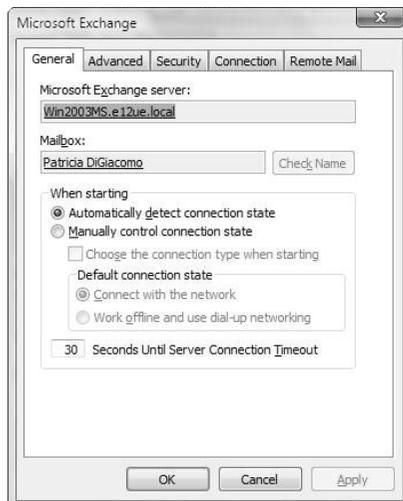
From this options dialog box, you can control how Outlook starts, whether to use a local copy of the mailbox, how security operates, how Outlook connects to the server, and how you handle remote mail.

- The General tab enables you to control how Outlook starts and whether it connects to the Exchange Server automatically or through dial-up networking. You can also view your mailbox name and your Exchange Server name.

- The Advanced tab enables you to configure additional mailboxes to open, cached Exchange mode, and offline access.

- The Security tab controls encryption and password protection for Outlook.

- The Connection tab controls whether Outlook connects to the Exchange Server through a LAN or a dial-up networking connection.

- The Remote Mail tab enables you to configure filtering information for remote mail.

One tab in this dialog box isn't present in the properties dialog box for a Personal Folders file: the Permissions tab. This tab, shown in Figure 3.22, enables you to give other Exchange users permission to view or edit items in your mailbox.
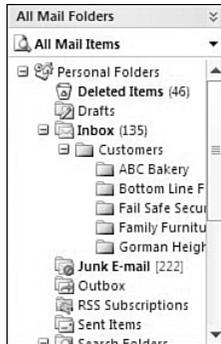
**Figure 3.22**
The Permissions tab enables you to configure sharing permissions.
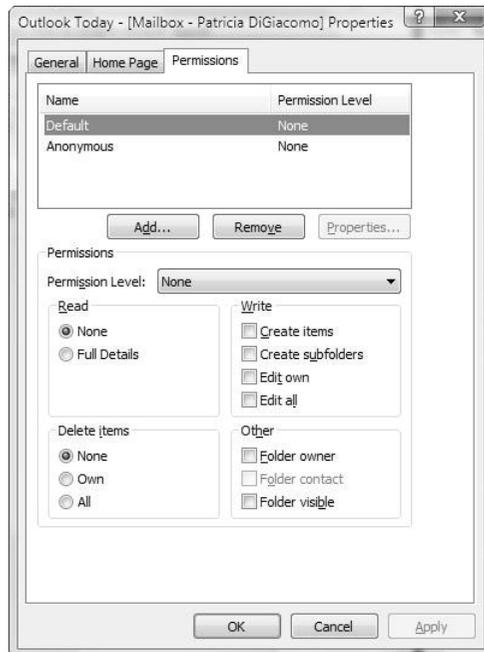
## CONFIGURING PROPERTIES OF AN OUTLOOK FOLDER

Every folder within a Personal Folders file has some of the same characteristics. As shown in Figure 3.23, the Inbox has a blue number 135 in parentheses. This number indicates that there are 135 unread messages in the Inbox. A blue number next to the Outbox indicates the number of messages waiting to be sent to the mail server. A blue number in parentheses next to any other Outlook folder indicates the number of unread items in that folder.

**Figure 3.23**
A number in blue parentheses represents the number of unread items in the folder.



Each folder has properties you can access to help you manage the contents of that folder. Right-click on the folder name and select Properties to display that folder's properties (see Figure 3.24).

**Figure 3.24**
This example shows the properties for the ABC Bakery folder.

**NOTE**

> If your folder properties dialog box doesn't look exactly like Figure 3.24, you're probably using an Exchange mailbox for your default message store. The properties dialog box for a folder stored on an Exchange Server has two additional tabs: Permissions and Synchronization.

The General tab of the folder properties dialog box looks similar to the properties dialog box of a Personal Folders file. It displays the name of the folder and enables you to configure some basic display information about the folder.

**NOTE**

> You can change the name of any folder you create directly from the folder's properties dialog box. However, even though the name of the folder is highlighted in the folder's properties dialog box, you cannot change the name of one of Outlook's default folders.

Outlook offers you the option to display the number of unread items in the folder or the total number of items in the folder. If you choose to show total number of items, the folder doesn't display the number of unread items in blue; rather, it displays in green only the number of total items in the folder.

**NOTE**

> The Drafts folder displays the total number of items in the folder by default, rather than the total number of unread items. You can change this behavior if you prefer to see only unread drafts displayed.

The next option on the General tab is the When Posting to This Folder, Use drop-down list. All folders have a default post item associated with them. A *post* item is different from a mail item because it isn't actually sent anywhere. You create a post item and save it in a folder. Every Outlook item has its own message class, which is similar to a file extension. The default message class for a post item is IPM.Post. You probably won't post many items in your Outlook Inbox, but you might utilize this feature in other folders. So, if you need to store a new item in a folder, you can use a post item instead of emailing yourself the item and moving the email to the folder. For example, when I register for a conference, I typically receive several emails from the conference with all of my registration and hotel information. Rather than keeping each one of those emails separately, I create a new post item in my Conferences folder. I can then copy and paste parts of each email into a new post item. Then I save the post item in a folder that I synchronize to my PDA. You can use the properties dialog box to set the default post item to the standard post item or to a custom form.

→ For more information about message classes, **see** "Outlook's Message Classes," **p. 918**.

The last item on the General tab is the Folder Size button. Click this button to display the Folder Size dialog box (see Figure 3.25).

**Figure 3.25**
The Folder Size dialog box displays the size of your folder and any subfolders.
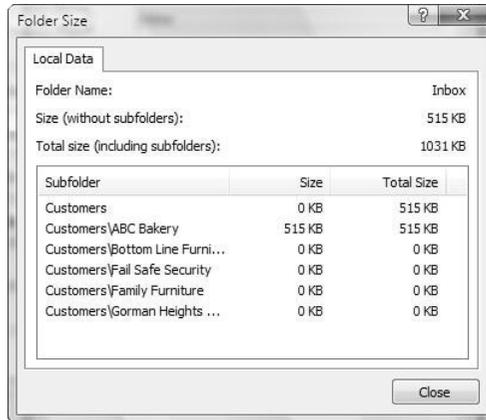


If you're concerned about rapidly growing mail folders, use the Folder Size dialog box to examine both the size of the current folder and the size of any subfolders of the current folder. This dialog box can help you locate where your large messages or large attachments are stored.

The Home Page tab of the file properties dialog box enables you to set a folder home page for your Outlook folders. On the Home Page tab, you can enter a location for the folder's home page. After you've entered a location for the home page, you can check the box marked Show Home Page by Default for This Folder. You cannot turn on the Folder Home Page setting until you've entered a location for your folder home page.

→

The AutoArchive tab, shown in Figure 3.26, enables you to manage AutoArchive settings for this particular folder. You can choose to archive this folder using the default settings or configure your own settings.
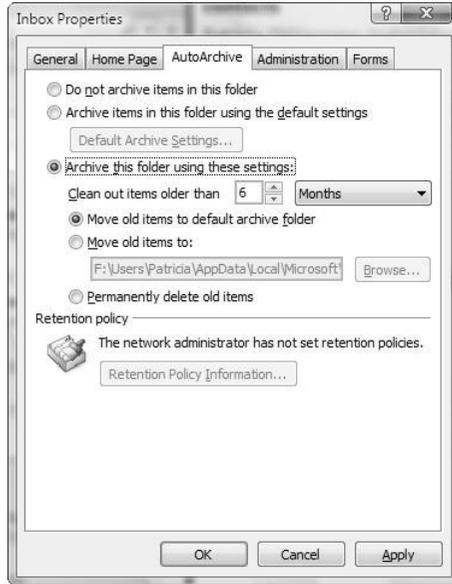
→

The Administration tab enables you to set an initial view for your folder. All other settings on the Administration tab are accessible only for public folders.

The Forms tab enables you to manage the forms associated with your folder.

→

**Figure 3.26**
The AutoArchive settings page allows you to configure folder-specific AutoArchive settings.



## CONFIGURING PROPERTIES OF A CONTACTS FOLDER

The Contacts Properties dialog box contains two additional tabs. The first additional tab is the Outlook Address Book tab shown in Figure 3.27.

**Figure 3.27**
The Outlook Address Book tab enables you to configure your Contacts folder as an Outlook address book.
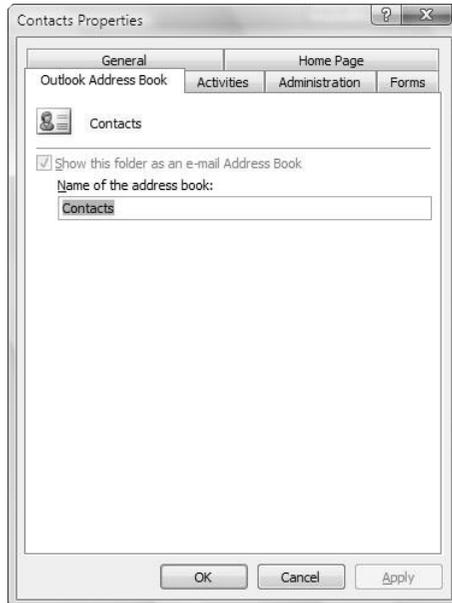
The Outlook Address Book tab allows you to include any Contacts folder in your Outlook address book. The Outlook address book can encompass an Exchange Global Address list and as many Contacts folders as you want. You can also include a Public Contacts folder in your Outlook address book. Folders included in your Outlook address book appear when you click the To button in an email message.

You can also specify a name for your Contacts folder. This name determines how your Contacts folder will appear in the Outlook address book. Changing this name does not affect the name of the Contacts folder in the folder list.

The other additional tab is the Activities tab shown in Figure 3.28.

**Figure 3.28**
The Activities tab enables you to configure what types of Outlook items appear in the Activities tab for contacts in a Contacts folder.
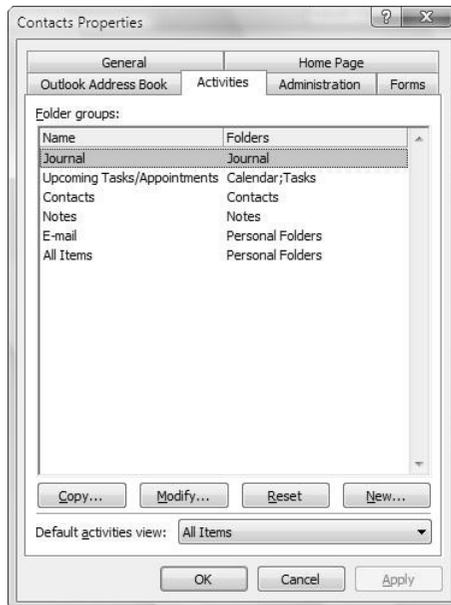
Every contact item can have activities associated with it. Those activities can be emails, meetings, appointments, events, journal items, tasks, and notes. The Activities tab enables you to configure which types of Outlook items from which folders appear in the Activities tab for contacts located in this Contacts folder. You can also configure the initial view for the Activities tab and specify which items should be shown by default.

→

# MANAGING DATA WITHIN FOLDERS

Items within Outlook folders can be copied or moved from folder to folder to better organize and find information. Each Outlook folder is designed to hold only one type of item. You cannot copy a task item to the Inbox and have it remain a task item. Similarly, you cannot move a journal entry to the Calendar folder and preserve it as a journal entry. Moving or

copying an item to a folder that isn't its default item type results a new item being created. The new item is the default item type for the folder. That process is called *AutoCreate*.

## COPYING AND MOVING ITEMS BETWEEN FOLDERS

If you create new folders to manage your Outlook information, you'll probably need to move items to those folders in some manner. You can create rules to automatically move items based on specific criteria, but not all messages will meet predefined criteria. To copy or move items manually, choose from the following methods:

- Drag and drop items.
- Use the Move to Folder option in the item's context menu.
- Use the Move to Folder or Copy to Folder commands from the Edit menu.

The process of dragging and dropping items is fairly straightforward. Display the folder list by selecting its icon in the Navigation Pane. Navigate to the folder containing the item in question and drag and drop the item to another folder. You can also drag and drop an item onto a folder name in the Navigation Pane to move the item to that folder. The default drag-and-drop action is to move the item to the destination folder. You cannot change this default behavior, but holding down the Ctrl key while dragging and dropping an item will copy the item rather than move it.

To move an item using the context menu, use the following steps:

1. Navigate to the folder that contains the item you want to move.
2. Right-click on the item and select Move to Folder to display the Move Items folder list shown in Figure 3.29.
3. Select the destination folder or use the New button to create a new destination folder.
4. Click OK.

**Figure 3.29**
The Move Items folder list enables you to choose the destination folder or create a new one.
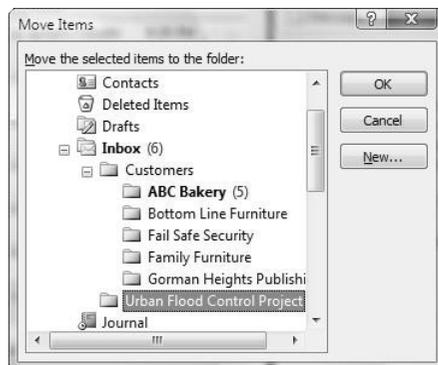
To copy an item to another folder, you must use the Edit menu as shown in the following steps:

1. Navigate to the folder that contains the item you want to copy.

2. Select the item.

3. Select Edit, Copy to Folder to display a folder list almost identical to the one shown in Figure 3.29.

4. Select the destination folder or use the New button to create a new destination folder.

5. Click OK.

You can also use any of the previously defined methods to move or copy multiple items. Simply navigate to the folder that contains the items you want to move or copy and use the Ctrl or Shift key to select multiple items. Then follow the steps you just learned to move or copy the items to their destination folder.

One last way to move or copy items with similar properties is to use Outlook's Find utility to find a group of like items. Then use the Ctrl or Shift key to select all or some of the items and drag and drop the items to another folder.

*If you attempted to move an item and suddenly can't find it, see "Where Did My Items Go?" in the "Troubleshooting" section at the end of the chapter.*

## DRAGGING AND DROPPING ITEMS WITH AUTOCREATE

One of Outlook's most powerful features is the capability to create any type of item from another type of item. This is known as AutoCreate. Using AutoCreate, you can create an appointment from an email in as little as two or three mouse clicks. You can create a task from a note, an email from a task, or a journal entry from a meeting.

AutoCreate takes over whenever you move or copy an item from one Outlook folder type to another. If you try to copy an email message to a Tasks folder, Outlook creates a task from that email message, as shown in Figure 3.30.

> **N O T E**
>
> If you drag a meeting request from your Inbox to the Tasks folder, Outlook creates a task with a due date of the date of the meeting. Outlook guesses that any tasks related to that meeting will have to be completed before the meeting.

In addition to simply dragging and dropping an item to another folder type, you can use some of the advanced features of AutoCreate by using the right mouse button to drag and drop items. If you drag and drop an email to the Tasks folder using the right mouse button, you can choose from any of the following AutoCreate options:

■ **Copy Here as Task with Text**—Creates a new task with the header and body of the email in the body of the new task.

■ **Copy Here as Task with Attachment**—Creates a new task with the original item attached to the new task, as shown in Figure 3.31. Double-click the attachment to open the original item. The original item is left in its original location.

**Figure 3.30**
A task created using AutoCreate contains the email as the task body.
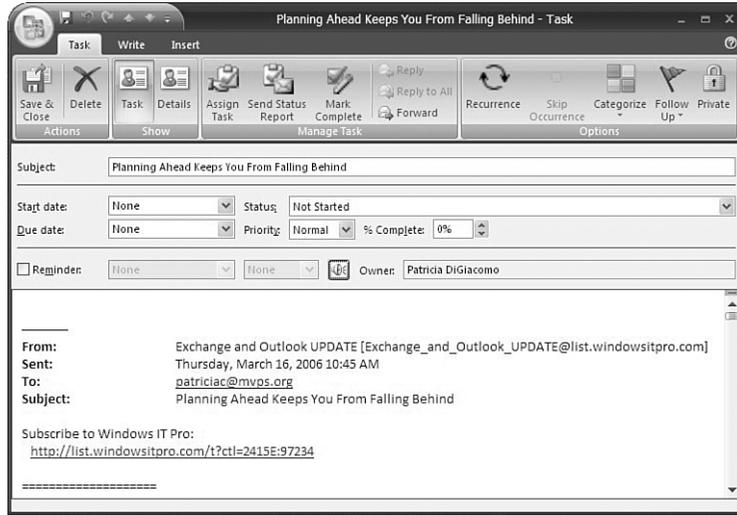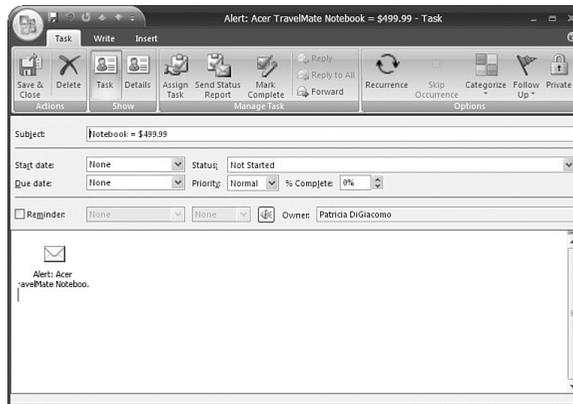


**Figure 3.31**
A task created with Copy Here as Task with Attachment will contain an attachment of the original item.



- ■ **Move Here as Task with Attachment**—Creates a new task with the original item as an attachment to the task. The item is removed from its original location.
- ■ **Cancel**—Cancels the AutoCreate process.

The most common AutoCreate option is the default option, Copy Here as Task with Text. This option leaves the original item intact and displays all details from the item in the newly created task. You can use AutoCreate with multiple items at once. Simply use the Ctrl or Shift key to select the items and use any other AutoCreate method. Copy Here as Task with Attachment is particularly appropriate when you're working with multiple items because they will all be attached to the newly created task item. The AutoCreate methods described earlier can be used with any type of source or destination folder.
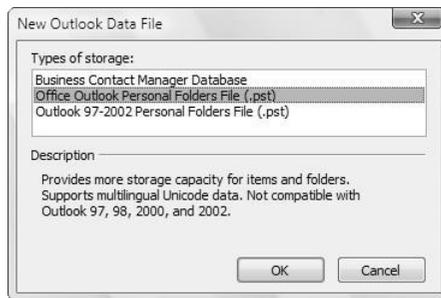
# USING MULTIPLE PERSONAL FOLDERS FILES

You aren't limited to only your default Personal Folders file. You can create as many Personal Folders files as you need. You might want to create new Personal Folders files for different projects. If you have a hard time keeping your email organized, you might even want to create a new Personal Folders file for each year. You can archive your emails from each year into their own Personal Folders file.

## CREATING A NEW PERSONAL FOLDERS FILE

To create a new Personal Folders file, click the Office button and select New, Outlook Data File (see Figure 3.32).

**Figure 3.32**
You can create two types of Personal Folders files.

3

Outlook 2007 can use two types of Personal Folders files. You can create an Office Outlook Personal Folders file with support for multilingual Unicode data or choose to create a Personal Folders file compatible with all previous versions of Outlook. Select the type of Personal Folders file you need to create and click OK to display the Create or Open Outlook Data File dialog box, as shown in Figure 3.33.

**NOTE**

> If you need to access your Personal Folders file only from Outlook 2003 and 2007, you can create either type of Personal Folders file. If you need to access your Personal Folders file from previous versions of Outlook, you should never create a Unicode Personal Folders file. The new, Unicode-compatible Personal Folders file cannot be opened in previous versions of Outlook. It doesn't matter if you're importing items from older versions of Outlook, you can still use the new format as long as you no longer need to access the file with previous Outlook versions.

Outlook suggests a default location for your new Personal Folders file. The default location is `C:\Documents and Settings\`*ProfileName*`\Local Settings\Application Data\Microsoft\ Outlook`. You can change this location to another folder on your hard drive or a network file share. Select a location for your Personal Folders file and enter a filename. Click OK to open the Create Microsoft Personal Folders dialog box, as shown in Figure 3.34.

**Figure 3.33**
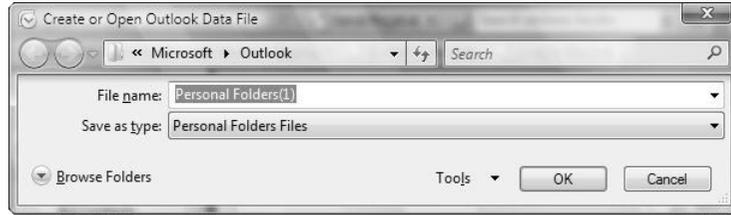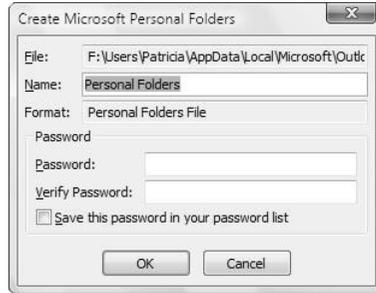In this dialog box, you select the location for your new Personal Folders file.



**Figure 3.34**
Here, you can enter specific details about your Personal Folders file, such as name, display name, and password.



The name you enter in the Create Microsoft Personal Folders dialog box is the actual file-name for your Personal Folders file. You can also choose a display name that will show in Outlook's folder list.

You can also password protect your Personal Folders file when you create it. Be aware that many password-cracking utilities are on the market today. Many are low cost or free. If you're concerned about a nosy officemate reading your email, use a Personal Folders password. If you're dealing in highly sensitive information, consider an encryption program such as PGP (www.pgp.com). Click OK to create your Personal Folders file. Your folder list will now include your new personal folders. If you look at Figure 3.35, you'll see my new personal folder, Projects, in my folder list.

You can create as many Personal Folders files as you need. Many people use a Personal Folders file to store all communications about a particular project or with a particular client.

After you create a Personal Folders file, you can set it as the default delivery location for your received messages. Select Tools, Account Settings and click the Change button. Use the drop-down list marked Deliver New Email to the Following Location and select the Personal Folders file you need. It's important to name your Personal Folders files when you create them so that you see something other than multiple instances of the title Personal Folders in this drop-down box.
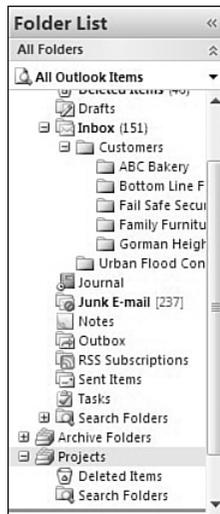
## OPENING A PERSONAL FOLDERS FILE

Personal Folders files are an easy way to share information with others. If you need to transfer all of your contacts to another person, you can export those contacts to a Personal Folders file and send the entire Personal Folders file to that person. Many professional

sports teams and even some Little League teams are emailing Personal Folders files to fans or parents for import into their calendar. To open a Personal Folders file, select click the Office button, <u>O</u>pen, Outlook Data F<u>i</u>le. Navigate to your Personal Folders file and click OK. The Personal Folders file is added to your folder list. If you receive a Personal Folders file via email, you must first save it to your hard drive and then open it through Outlook.

**Figure 3.35**
Your folder list displays all open Personal Folders files in alphabetical order.



## REMOVING A PERSONAL FOLDERS FILE FROM THE FOLDER LIST

If you create a large number of Personal Folders files, you'll probably want to remove some of them from the folder list eventually. After all, if you make heavy use of the Favorite Folders portion of the Navigation Pane or have a screen resolution of 800×600, you can't see very many folders in the folder list area. To close a Personal Folders file, right-click on the name of the Personal Folders file and select <u>C</u>lose <*filename*>. The Personal Folders file disappears from your folder list. This action doesn't delete the Personal Folders file. The data is still intact, and you can reopen it at any time. The only way to delete a Personal Folders file is to find the file in the file system and delete it. You cannot delete it from within Outlook.

# FOLDER HOME PAGES AND WEB VIEWS

Every Outlook folder supports a folder home page. This is the Internet web page, HTML file, or Active Server Pages (ASP) file that you'll see when you click the folder's name. An example of a folder home page is shown in Figure 3.36.

**Figure 3.36**
You can set a folder home page for any Outlook folder.
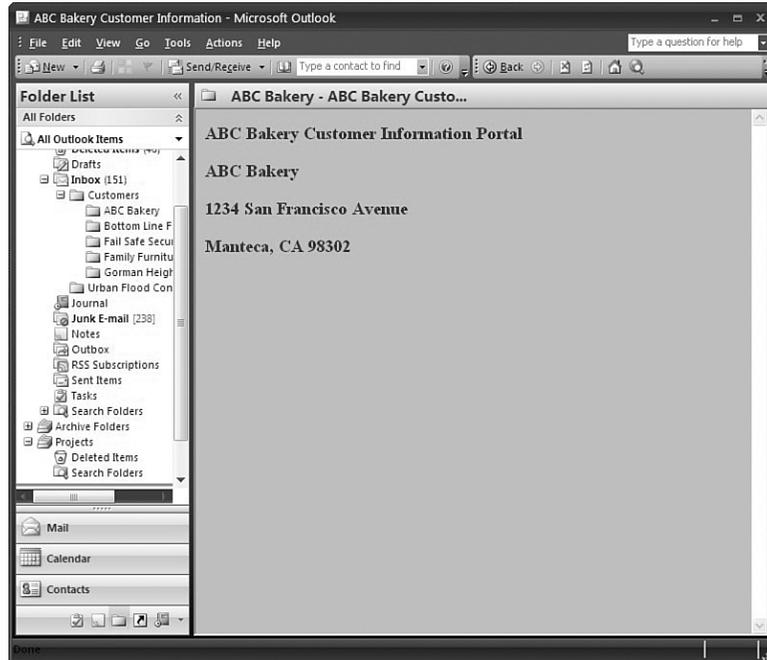


You can set your folder home page to a shared meeting workspace or your company's home page.
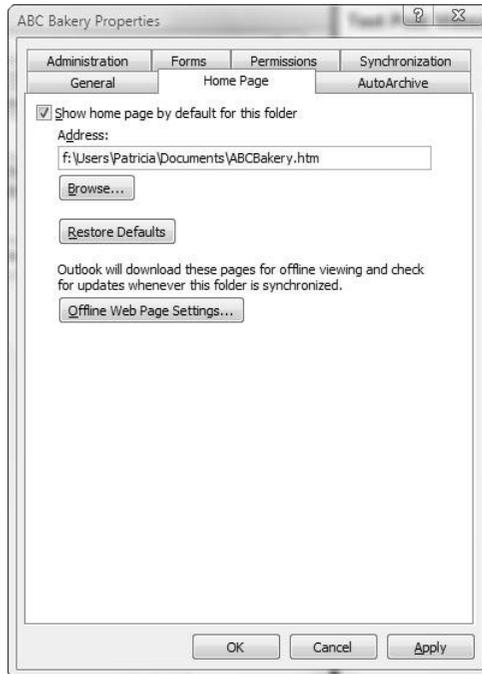
## WHY USE A FOLDER HOME PAGE?

Setting a folder home page to a generic website really isn't very helpful. After all, you can't actually access any of the items in that Outlook folder with a website as your home page. However, you can create your own folder home page and embed an ActiveX control called the Outlook View Control. With the Outlook View Control, you can view the items in an Outlook folder from a web page. Outlook Today is an example of a type of folder home page that utilizes this functionality.

## SETTING A FOLDER HOME PAGE FOR A FOLDER

Setting a folder home page is fairly simple. Right-click on a folder and select Properties. In the properties dialog box, click the Home Page tab so that it is displayed (see Figure 3.37).

Enter the URL or path for your folder home page. A folder home page can be a website on the Internet or a file on your intranet. Click the Browse button to locate a file on your hard drive or network share. Make sure that the Show Home Page by Default for This Folder check box is checked and click OK to save your changes.

**Figure 3.37**
You use the Home Page tab to set or remove a folder home page.



**3**

## REMOVING A FOLDER HOME PAGE FROM A FOLDER

If you need to access the items in the folder or just don't need the folder home page anymore, right-click on the folder and select Properties. Select the Home Page tab of the Properties dialog box. Uncheck the box marked Show Home Page by Default for This Folder. You can also delete the URL of the home page. Click OK to save your changes.

## PROGRAMMING A FOLDER HOME PAGE

You can program your own folder home page just like any other web page. You can create a new folder home page in any HTML editor (Word, FrontPage, Visual InterDev, or even Notepad). Within your new folder home page, you can provide links to other internal or external websites, graphics, and a mechanism for viewing the items within the Outlook folder. The Outlook View Control offers a way to access Outlook data through an ActiveX control on an HTML page. In Outlook 2007, the View Control is installed automatically and is available for use.

To set a reference to this file in an HTML page, use the following code:

```
<html>
<head>
</head>
<body>
<OBJECT classid=CLSID:0006F063-0000-0000-C000-000000000046
        id=ViewCtlFolder
        width="100%"
```

```
        height="430">
   <param name="Namespace" value="MAPI">
   <param name="Folder" value="Tasks">
   <param name="View" value="By Category">
   <param name="Restriction" value="">
   <param name="DeferUpdate" value="0">
</OBJECT>
</body>
</html>
```
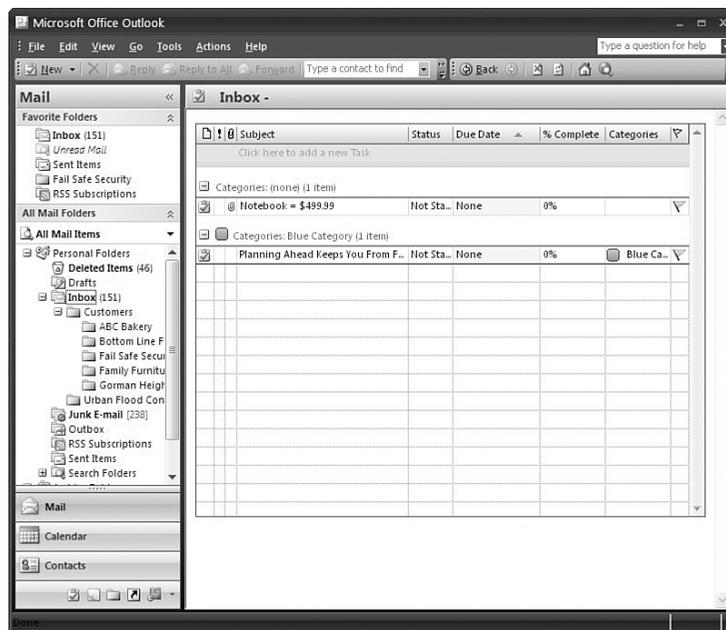
The preceding example creates a folder home page that displays a By Category view of your tasks, as shown in Figure 3.38. This can be helpful if you need to display your Outlook items along with links or other information from a corporate web site or Intranet.

**Figure 3.38**
This example shows the Inbox with a folder home page viewing the Tasks folder.



You can set any folder's home page property to this home page. The View Control exposes several parameters you need to set. The first is the Folder parameter. You can set this value to any folder in your default message store simply by typing the folder name. If you need to refer to a folder called Workgroup Meeting Minutes, which is a subfolder of the Inbox, use the following:

```
<param name="Folder" value="Inbox\Workgroup Meeting Minutes">
```

You can create a folder home page with two View Controls to display the contents of two different folders. Just create another reference to the Outlook View Control, as in the following example:

```
<html>
<head>
</head>
```

```
<body>
<OBJECT classid=CLSID:0006F063-0000-0000-C000-000000000046
        id=ViewCtlFolder
        width="100%"
        height="200">
   <param name="Namespace" value="MAPI">
   <param name="Folder" value="Tasks">
   <param name="View" value="By Category">
   <param name="Restriction" value="">
   <param name="DeferUpdate" value="0">
</OBJECT>

<P>
<P>

<OBJECT classid=CLSID:0006F063-0000-0000-C000-000000000046
        id=ViewCtlFolder
        width="100%"
        height="200">
   <param name="Namespace" value="MAPI">
   <param name="Folder" value="Calendar">
   <param name="View" value="Day/Week/Month View">
   <param name="Restriction" value="">
   <param name="DeferUpdate" value="0">
</OBJECT>

</body>
</html>
```
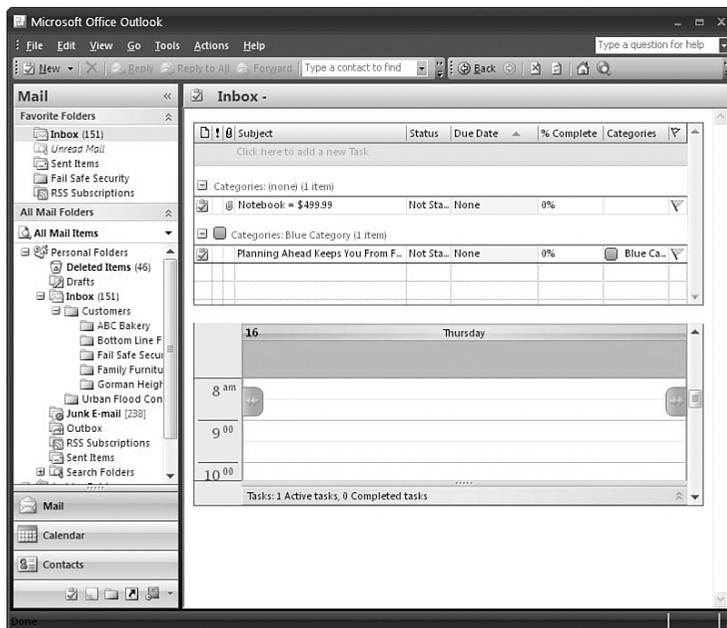
The preceding code creates a folder home page with a view of the Tasks folder and a view of one day of the Calendar folder, as shown in Figure 3.39.

**Figure 3.39**
This folder home page shows two Outlook View Controls.

There are other advanced properties of the View Control, but they're beyond the scope of this book. For more information about using the Outlook View Control, see the Microsoft Knowledge Base article "General Information About the Outlook View Control" at http://support.microsoft.com/default.aspx?scid=KB;en-us;q291407.

# TROUBLESHOOTING

### ERRORS IN PERSONAL FOLDERS FILES

When I start Outlook, I get a message about errors detected in my Personal Folders file. Outlook tells me to use the Inbox Repair tool, but that doesn't fix the problem.

You're receiving that error because your Personal Folders file has exceeded its size limit. Unfortunately, the Inbox Repair Tool cannot fix this type of problem. You can obtain a cropping tool from Microsoft that will reduce the size of your Personal Folders file. To obtain that tool, see the Microsoft Knowledge Base article "Oversized PST and OST Crop Tool" at http://support.microsoft.com/default.aspx?scid=kb;en-us;296088. Be aware that you'll lose some data. This tool removes data from the Personal Folders file to reduce its size to less than 2GB. Some messages will be lost. Because of this danger, I recommend keeping an eye on your Personal Folders file size and immediately removing messages or archiving items when Outlook warns you that your Personal Folders file is too large.

### WHERE DID MY ITEMS GO?

I tried to move some items to another folder, and now I can't find them. Are they lost forever?

The first place to look for lost moved items is the top-level folder in your default message store. That folder is either named Personal Folders or Mailbox - *Username*. That folder is used to display Outlook Today, but it can also store messages. The easiest way to see whether there are any messages in it is to right-click on the folder and select Properties. Go to the Home Page tab and uncheck the box marked Show Home Page by Default for This Folder. Click OK, and you'll be able to see whether there are any items in the folder. If there are, drag and drop those items into their originally intended folder.

# IMPROVING YOUR OUTLOOK

Now that you know how to create multiple Personal Folders files, create and move folders, and move and copy messages, you can put those tasks to work for you in your everyday business.

Let's assume that you work for a city public works department, manage four individuals, and are responsible for three concurrent projects. The four individuals you manage are Sally, Robert, John, and Lisa. The three projects are Urban Flood Control, Mosquito Abatement, and Low Income Housing Renewal. You receive approximately 70 emails a day from your employees, vendors, and your direct supervisors. You schedule meetings, delegate tasks, and record journal entries to track your progress.

To better manage your individual projects, you create a new Personal Folders file with the name Projects. Under that Personal Folders file, you create three folders, one for each project.

Creating those folders helps keep you organized. When you receive a message from Sally regarding an Environmental Impact Report on the Urban Flood Control project, you move the email to the Urban Flood Control folder. When Robert proposes a meeting with a contractor bidding on the Mosquito Abatement project, you create a task using AutoCreate to pull a copy of the contractor's business license and call for references. You also move a copy of that task to the Mosquito Abatement folder so that you have a record of it in that folder.

Creating new folders and moving and copying messages provide several benefits. You keep your Inbox relatively uncluttered. Staring at an Inbox with 500 messages, even with Outlook 2007's new organizational features, can make even the smallest task overwhelming. When you need to find an email related to the Low Income Housing Renewal project, you don't need to search through multiple folders. You navigate to the Low Income Housing folder and search only that folder.

Because all these folders are in a Personal Folders file, you can put the entire file on a network share. Then when you go on vacation in June, your temporary replacement can access your Personal Folders file and obtain any information she needs on any of the projects you've been working on. You don't have to give her access to your default message store, so she can't read sensitive communications with your supervisor or the impressive collection of jokes you've accumulated over the years.

Putting Personal Folders files and Outlook Folders to work for you can save time and make sharing information without an Exchange Server much simpler.

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