



Email User Guides

*a series of guides for organizing
and managing your email*

OYA Information Services
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Managing Your Outlook Account

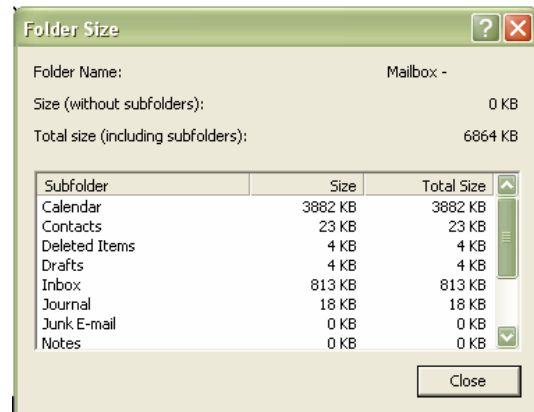
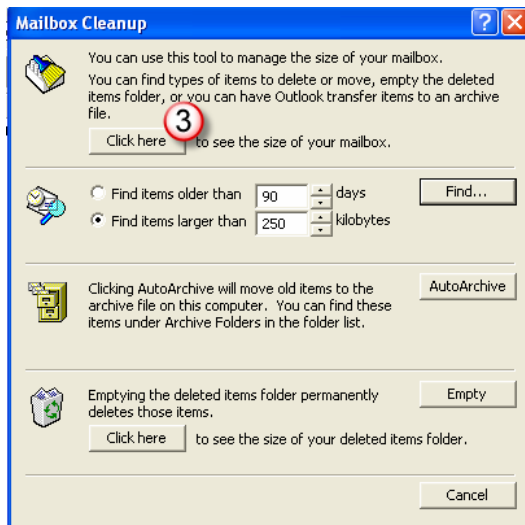
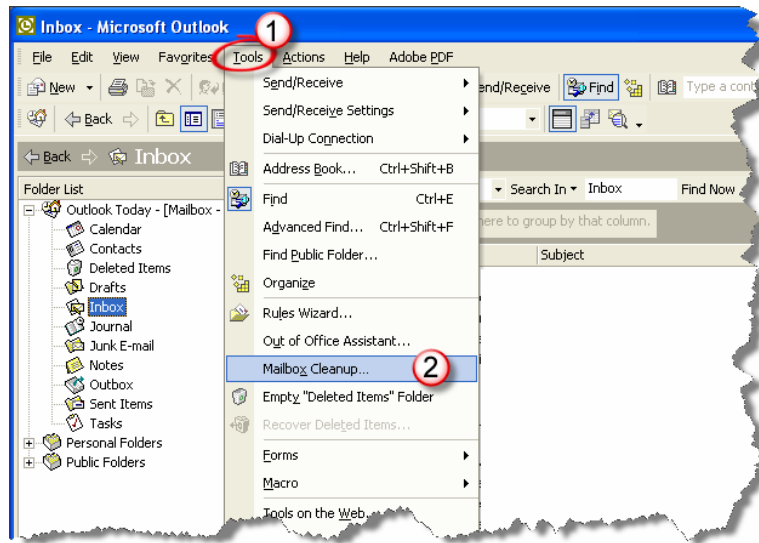
The following user guides show users how to: determine how much space is remaining in their Outlook account; set up personal folders for saving and organizing email messages; and delete old email messages.

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❖ Determine Outlook Capacity

To determine how much Outlook space a user has available to them, the user can access the **Mailbox Cleanup** feature to find types of items to delete or move, empty the deleted items folder, or transfer items to an archive file.

1	Select the Tools menu.
2	Select Mailbox Cleanup from the drop-down menu.
3	The Mailbox Cleanup window opens. Click the Click here button.



The Folder Size box opens displaying the sizes of the various folders (Calendar, Contacts, Inbox, etc.). Based on the capacity allotted to the general user (currently 20,000 KB or 20 MB), they can see which folders may need the most attention in terms of clean-up and management.


NOTE: The Outlook account size also includes Calendar items, Contacts, and Sent Mail.

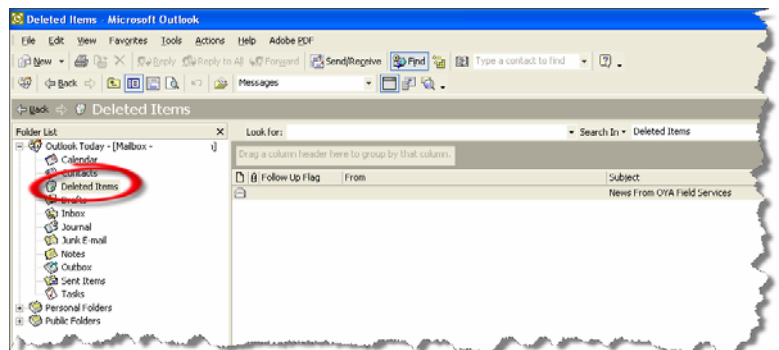
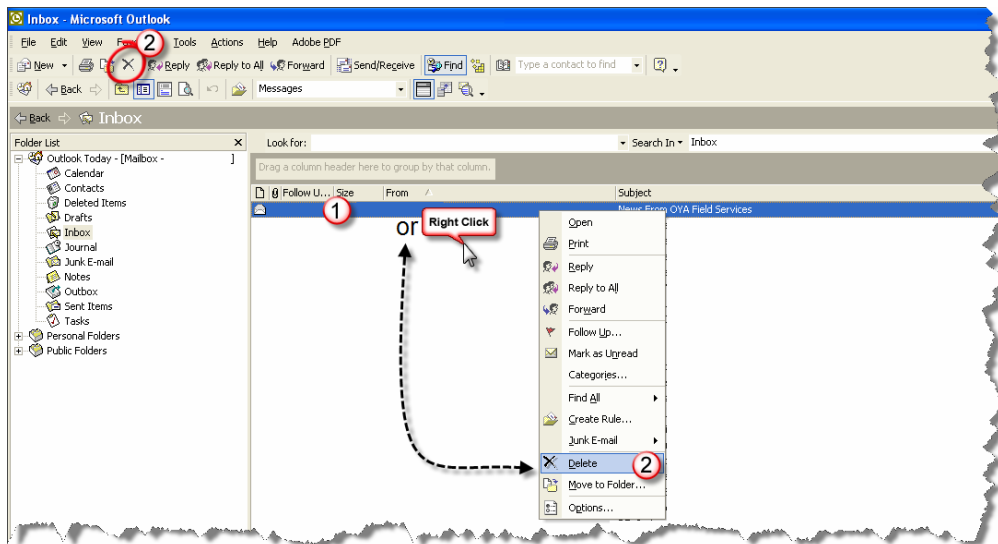
❖ Delete Old E-Mail

Oregon Administrative Rule (OAR 166-300-0015 (8)) does direct that correspondence (communications created or received by an agency, AND directly relate to an agency program or agency administration, AND are not otherwise specified in the State Agency General Records Retention Schedule) includes electronic messages that communicate formal approvals, directions for action, and information about contracts, purchases, grants, personnel and particular projects or programs. Communications not meeting the above criteria do not need to be filed and may be retained as needed.

A Rule of Thumb or at least a goal of the State Department of Administrative Services' (DAS) is that "an email message [like a paper record] should be preserved only for as long it is needed to accurately document agency functions",

Email messages that do not qualify under Public Records laws or State Archives rules should be deleted once they are no longer needed. There are multiple ways to delete email messages.

1	Select the email message to be deleted.
2	Simply tap the Delete key on the computer keyboard --  . . . or Click the X on the Outlook toolbar . . . or Right-click the message and select Delete from the drop-down menu.

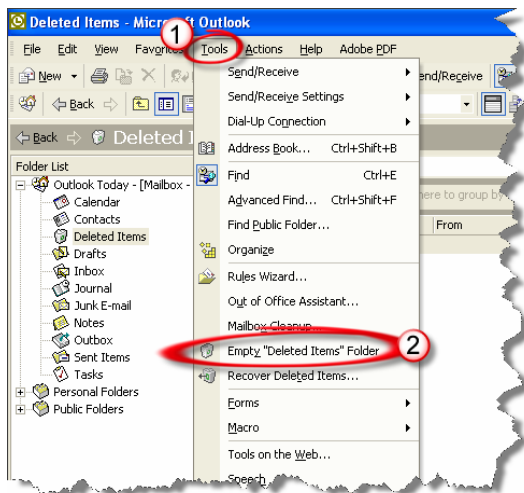


The deleted email message is now in the Deleted Items folder.

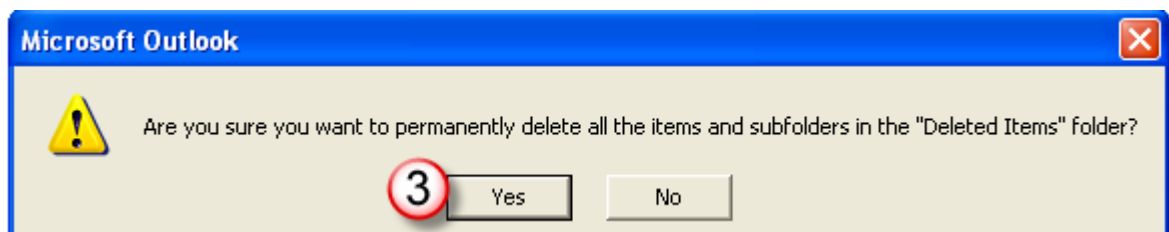
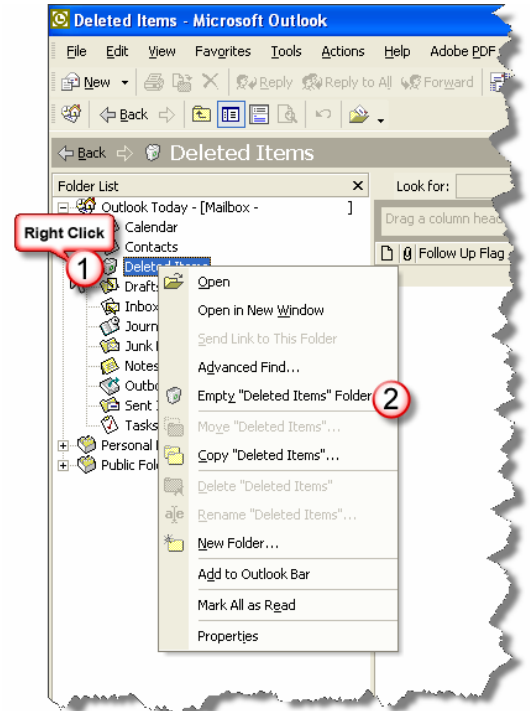
❖ Empty "Deleted Items" Folder

Even though a message has been deleted, it is still retained in the "Deleted Items" folder -- the default is for Outlook to empty the Deleted items folder when the computer is shut down.

1	Select Tools from the Outlook toolbar or right-click the Deleted Items folder.
2	Select " Empty 'Deleted Items' Folder " from the drop-down menu.
3	Click Yes to the Outlook prompt confirming that the items should be permanently deleted.





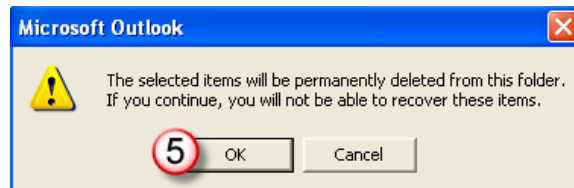
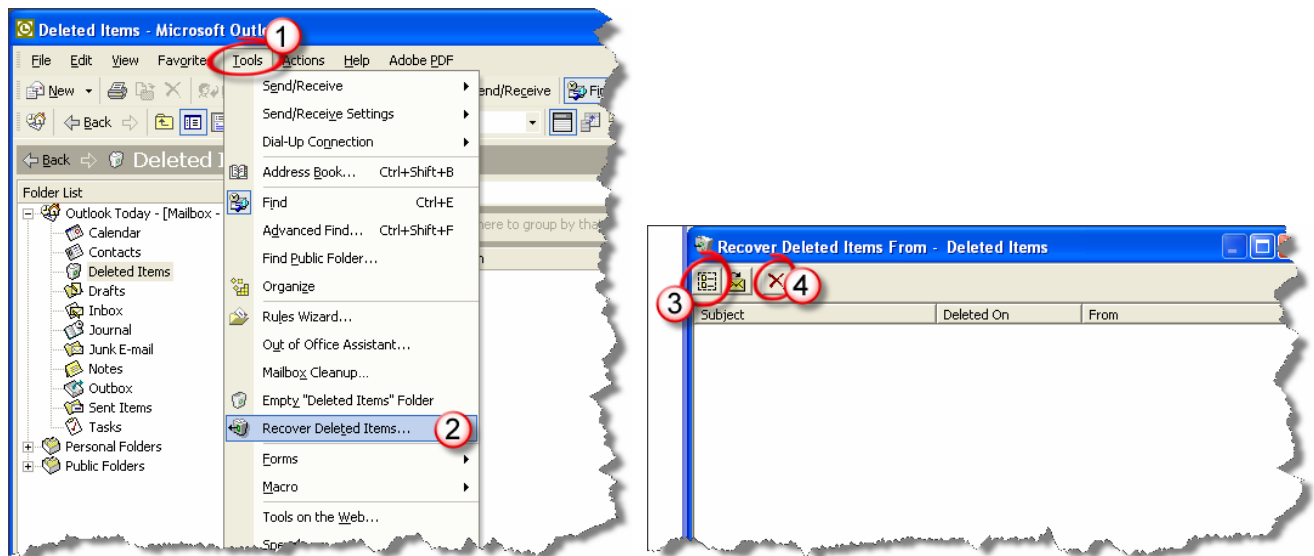
or



❖ Permanently Delete "Deleted Items"

Even though a message has been deleted and the Deleted Items folder has been emptied, messages are still retained in a "recycle" area from which messages can then be recovered or permanently deleted.

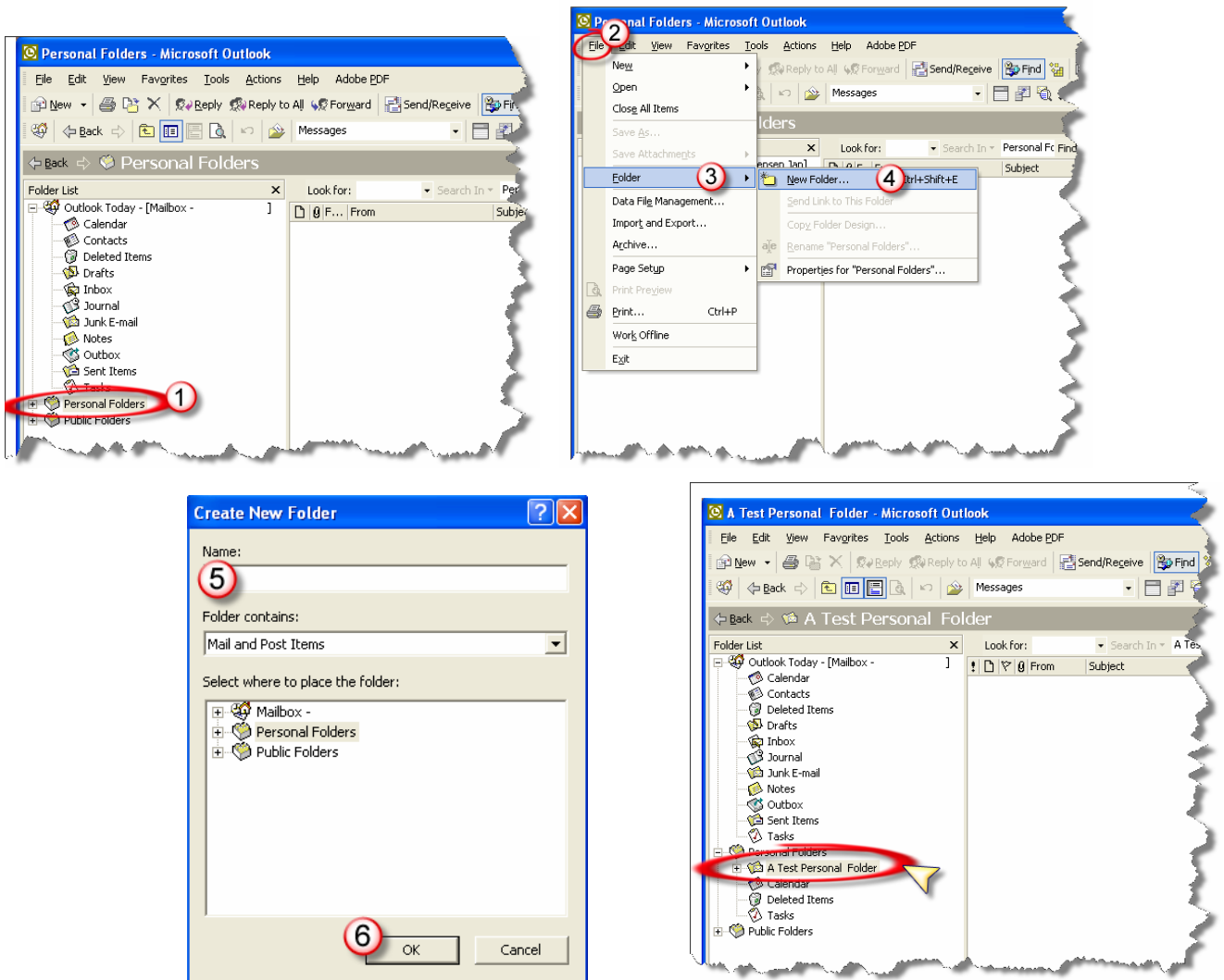
1	Select Tools from the Outlook toolbar or right-click the Deleted Items folder.
2	Select " Recover Deleted Items " from the drop-down menu.
3	Click the Select All button. 
4	Click the Purge Selected Items button. 
5	Click OK at the prompt confirming that the selected items are to be permanently deleted.



❖ Create Personal Folders in Outlook

In addition to the standard Outlook Inbox and the shared Public Folders (e.g., where OYA policies, forms, and other general access documents are saved in Public Folders for all OYA employees or employee groups to access), users can also create sub-folders set up by topic, date, sender, etc.

1	Select Personal Folders in the Navigation Panel Folder List.
2	Select File from the Outlook Toolbar.
3	Select Folder from the drop-down menu.
4	Select New Folder .
5	Enter a Name for the new personal folder.
6	Click OK .

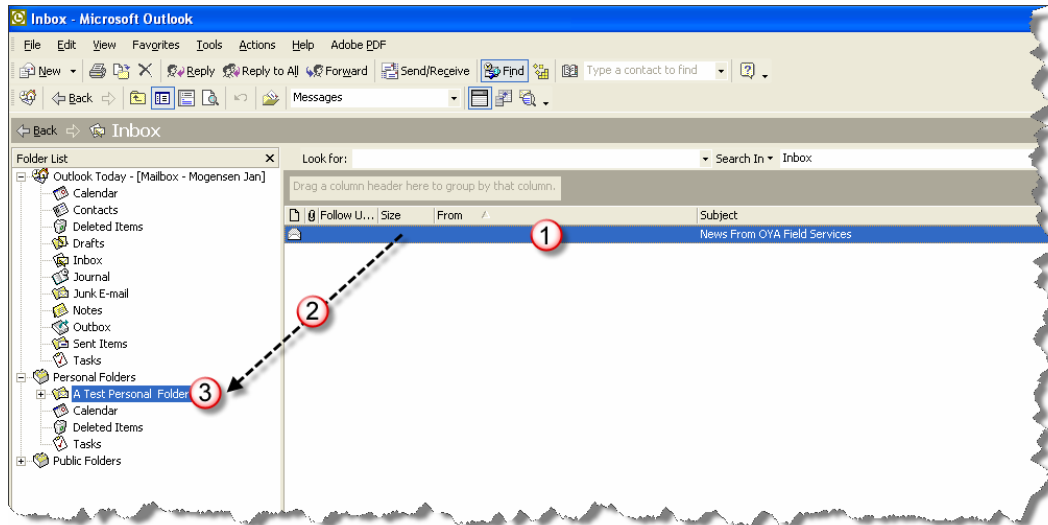


The new sub-folder appears in the designated Personal Folder in the Navigation Panel Folder List.

❖ Move E-Mail to Personal Folders

While Outlook offers many methods for moving (filing) email messages in Personal Folders, the following is the easiest and most efficient.

1	Select the email message you want to move and hold the cursor down on the message.*
2	Drag the message to the left toward the desired Personal Folder in the Navigation Panel Folder List.
3	When the folder is highlighted, release the cursor.

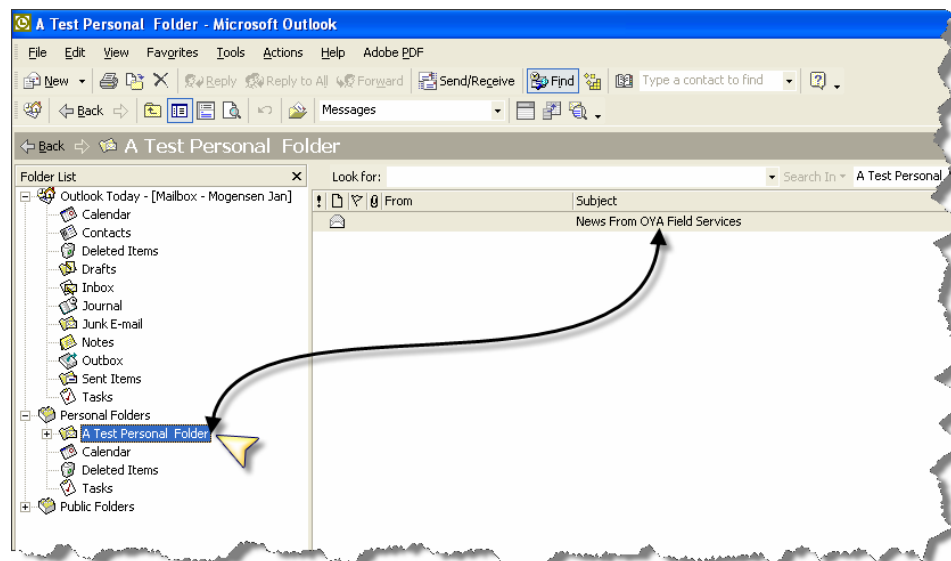


* TIP: Select Multiple Items

To select adjacent items, click the first item, and then hold down SHIFT and click the last item.

To select nonadjacent items, click the first item, and then hold down CTRL and click additional items.

To select all items, click the **Edit** menu, and then click **Select All**.

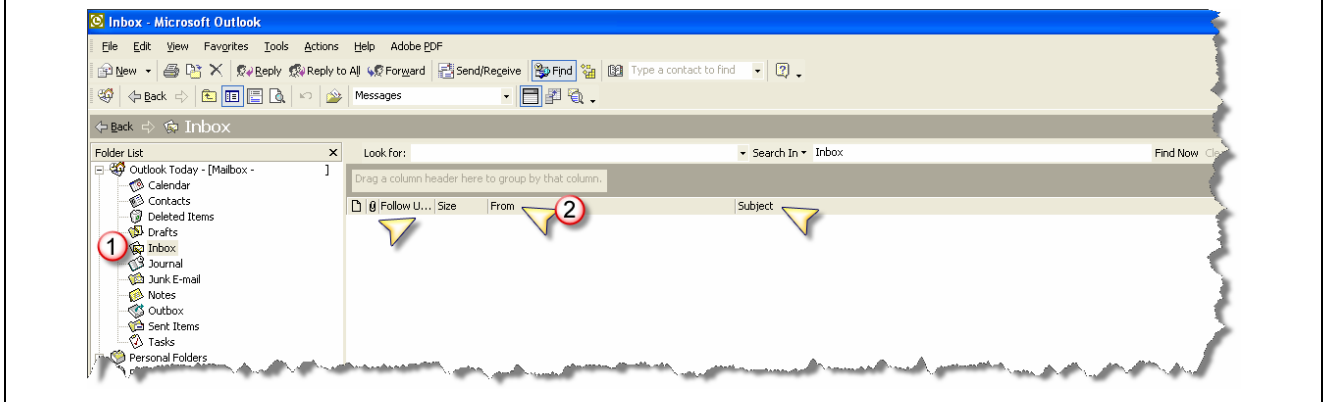


The moved email message is now in the selected Personal Folder.

❖ Search Email -- Sort the Email List

An easy way to sort the email list is by common email fields (e.g., From, Subject, Received Date, etc.).

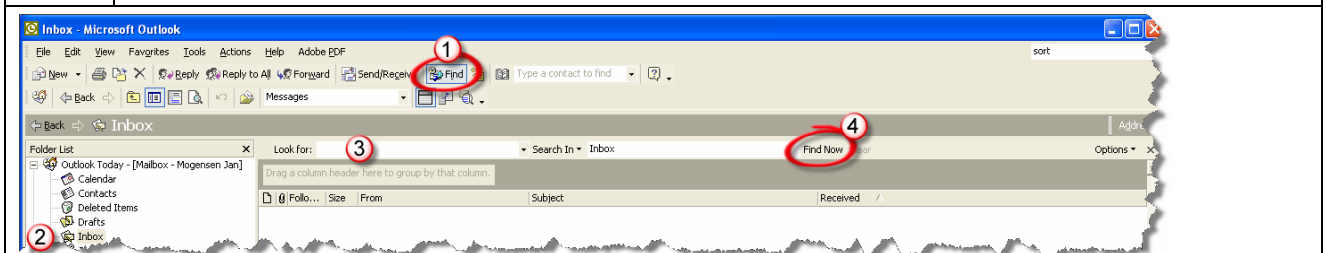
1	Select the Inbox in the Navigation Panel.
2	Click a column heading in the horizontal bar at the top of the list. TIP: If sorting by the "From" field, tap the first letter of the Sender's Last Name to quickly jump to that location in the list.



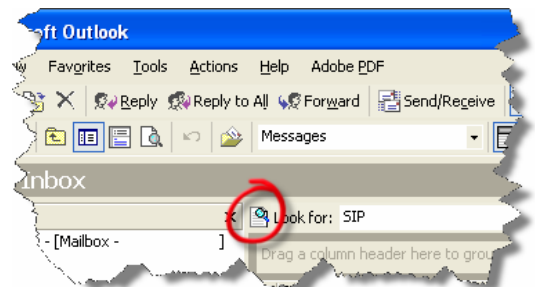
❖ Search Email – Find Email by Specific Criteria

Items can be searched for by specific criteria (e.g., a phrase or words used in an email message).

1	If it is not already highlighted (enabled), click the Find button on the Standard toolbar.
2	Select the Inbox in the Navigation Panel.
3	Enter the text to search for in the Look for field.
4	Click Find Now .



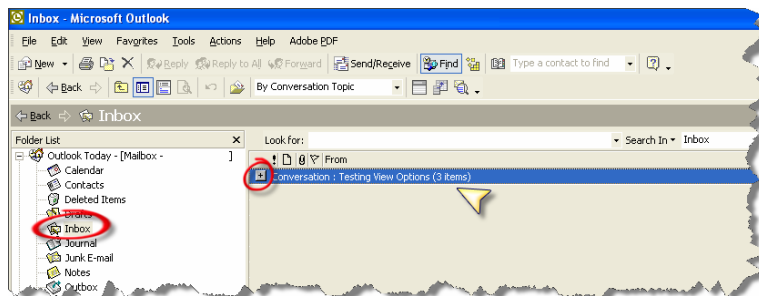
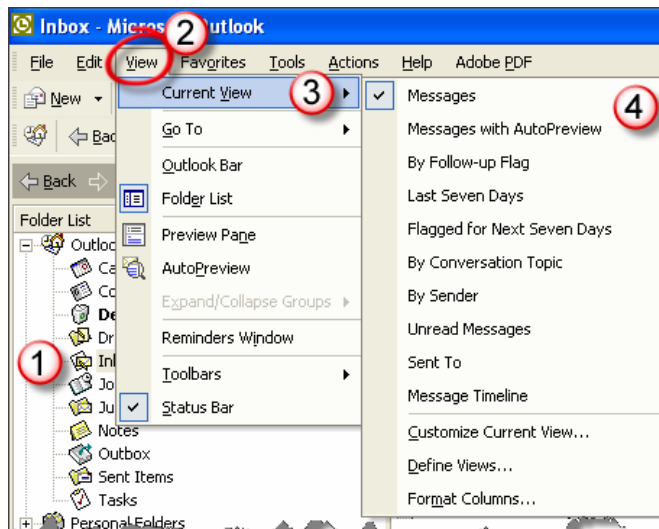
An animated magnifying glass launches while the messages are searched for the specified text.



❖ Search Email -- Switch to Another View

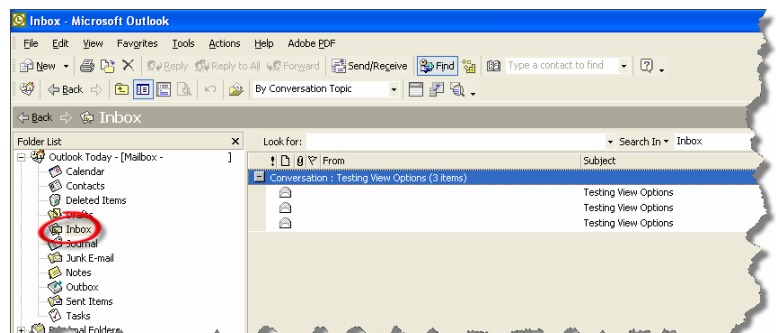
Views give users alternate ways to sort and find messages by organizing them by categories (e.g., topic, sender, sent to). A different View can help the user find a specific email in a group of messages or find the most recent email in an ongoing conversation of multiple emails.

1	Select the Inbox in the Navigation Panel.
2	Select View from the Outlook toolbar.
3	Select Current View .
4	Select a view from the list of options.



An example of the Inbox set to "View by Conversation Topic". All of the emails regarding the same topic are grouped together.

Click the plus sign to the left of the group to expand or open the topic and the individual messages within that topic display.



❖ Set Up Data Files for Archiving E-Mail

To archive old emails, users can create **Data Files**, which provide the ability to manage and save email to folders on the user's local server.

1	Select File from the Outlook Toolbar.
2	Select Data File Management from the drop-down menu.
3	An "Outlook Data Files" window opens – click Add .
4	A "New Outlook Data File" window opens – click OK .
5	A "Create or Open Outlook Data File" window opens – select My Documents and then select Outlook from the drop-down list.
6	Enter a file name for the data file – e.g., "2009 Email".
7	Click OK .
8	Enter a Name for the Personal Folder.
9	Click OK to return to the "Outlook Data Files" window.
10	Click Close .

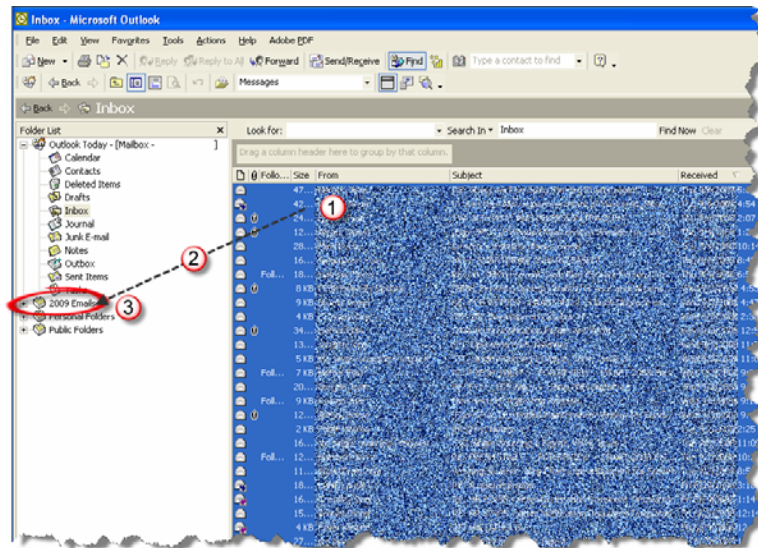
The following images illustrate the steps described in the table:

- Step 1:** Microsoft Outlook File menu.
- Step 2:** Outlook Data File Management option selected.
- Step 3:** Outlook Data Files dialog box, Add button highlighted.
- Step 4:** New Outlook Data File dialog box, OK button highlighted.
- Step 5:** Create or Open Outlook Data File dialog box, My Documents selected.
- Step 6:** Create or Open Outlook Data File dialog box, File name: 2009 Email.
- Step 7:** Create or Open Outlook Data File dialog box, OK button highlighted.
- Step 8:** Create Microsoft Personal Folders dialog box, Name: 2009 Email.
- Step 9:** Create Microsoft Personal Folders dialog box, OK button highlighted.
- Step 10:** Outlook Data Files dialog box, Close button highlighted.

❖ Move E-Mail to Data Files

While Outlook offers many methods for moving messages, the following is the easiest and most efficient.

1	Select the group of email messages you want to archive.*
2	Drag the group to the left toward the desired Data File in the Navigation Panel Folder List.
3	When the Data File is highlighted, release the cursor.



* TIP: Select Multiple Items

To select adjacent items, click the first item, and then hold down SHIFT and click the last item.

To select nonadjacent items, click the first item, and then hold down CTRL and click additional items.

To select all items, click the **Edit** menu, and then click **Select All**.