

## Archiving your Outlook mail, calendar and contacts

We get a lot of questions about archiving (backing up) items in Outlook. Understanding some basic terminology will help.

### Types of email accounts

There are three basic types of email accounts and each handles your mail, contacts and calendars in a specific way. The table below will help explain the differences

Email Type	Description	Main storage location	File type
Exchange server	<p>Microsoft Exchange Server can either be hosted from an in-house server or it can be hosted remotely through a service such as Office 365 or AppRiver. Exchange servers work as the “post office” for your mail, calendar and contacts, delivering them (syncing them) to your computers and mobile devices.</p> <p>As you send messages and create events or contacts on your computer, these items are synced with the Exchange Server. Once the Exchange Server has the item, it then syncs them to your other devices. This process can be initiated from any of your devices.</p> <p>Note that of the three email types in this table, only Exchange Server handles contacts and calendars as part of the service.</p>	In the cloud, on the exchange server, with a local copy (OST) stored on your computer	OST
IMAP	Although IMAP does not sync calendar and contacts (it does not use Exchange Server), it does a good job of syncing your email. Much like Exchange Server, IMAP stores your messages on a remote server and keeps a local copy of those messages in an OST file so they are accessible to you when you aren’t online.	In the cloud, on the IMAP server, with a local copy (OST) stored on your computer	OST
POP3	<p>POP servers sync your mail in a very limited way. Basically they download your mail to Outlook and then look at Outlook’s settings to see what to do with the server copy of your messages (See below.). POP accounts do not handle calendars and contacts at all. They only handle email.</p> <p>With a POP account, when someone sends you a message it resides on the server until you launch Outlook or another email client. When Outlook opens, it reaches out to the server and downloads the messages. At this point one of several things will happen, depending on your settings in Outlook or other mail client.</p> <ul style="list-style-type: none"><li>– The server will delete the messages you just downloaded, leaving your downloaded messages in Outlook as the only</li></ul>	Local computer	PST

	<p>copy</p> <ul style="list-style-type: none"> <li>– The server will maintain a copy of the downloaded messages for the number of days specified</li> <li>– The server will delete its copy of the downloaded messages when you delete them from the Deleted Items on your computer</li> <li>– The server will not delete messages</li> </ul> <p>The problem with POP accounts is they are totally impractical when today's users rely on multiple devices to receive email. Since there is no syncing between devices, it's very easy to become confused when items you deleted on one device remain on your other devices, and items you downloaded on one device may not be available on the others. In addition sent items from one device are not available on others.</p>		
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### OST vs PST – What's the difference

PST files are the most common data file used in Outlook. If you are using a POP account, this is the type of file you will find in your account settings. PST files store your email, calendar and contacts on your hard drive. Each time you open Outlook, new messages are downloaded and appended to your PST file. Each time you create a new contact or task, it is also appended to the PST file.

OST files are a feature of the Exchange Server and provide a local (cached – pronounced “cached”) copy of your email, calendar and contacts. This allows you to work offline when a connection to the Exchange computer may not be possible or wanted. The OST file is synchronized with the Exchange Server when a connection is available. By keeping a local copy of your Exchange items, Outlook performs much faster.

### IMAP

IMAP accounts also cache a local copy of your messages in an OST file. Outlook handles IMAP accounts differently from Exchange Accounts since IMAP does not employ an Exchange Server. With IMAP, prior to Outlook 2013, Outlook stored your email in an OST file and your calendar, contacts and tasks in a PST file. Starting with Outlook 2013, Outlook stores everything in a single OST file.

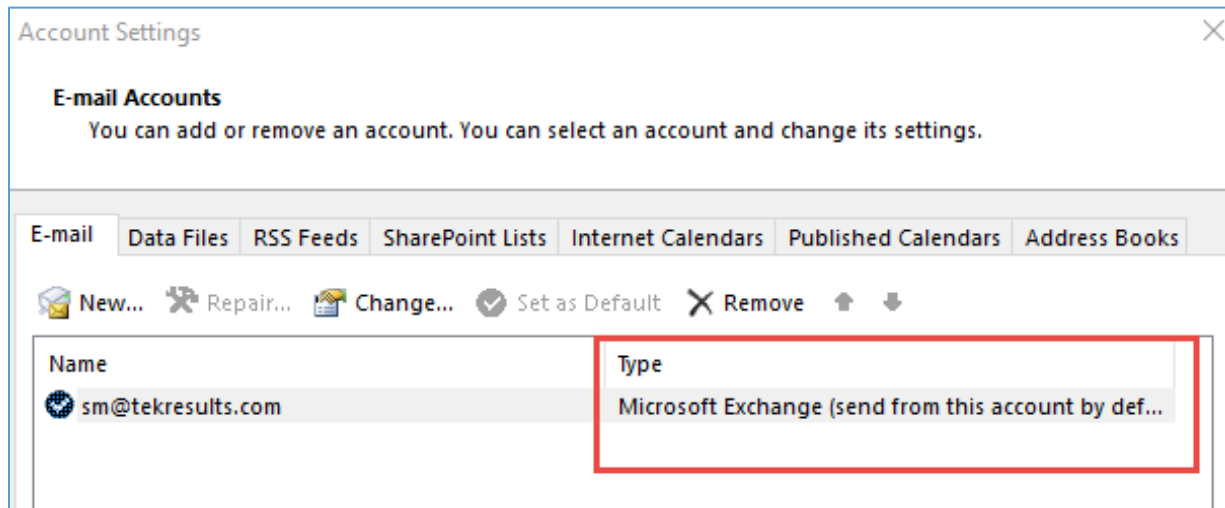
Because IMAP doesn't handle contacts, calendar or tasks, but those things are stored in the same OST file as the IMAP mail, Outlook creates folders for those items with **This computer only** appended to their names.

IMAP stores your messages on an IMAP server in the cloud. Your desktop and mobile devices sync to that server so that if you receive/ delete a message, that change is synced to all your devices. For example, if you receive a message on your phone, all your other devices receive the message as well. When you delete a message from your phone, that message is deleted from all your other devices as well.

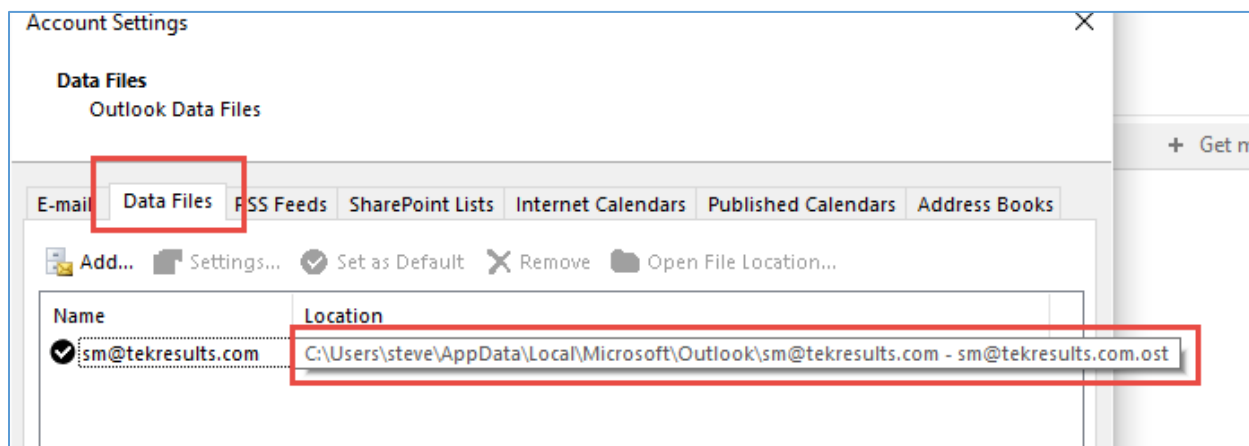
### What type of email account do I have?

The file format Outlook uses is dependent on the type of email account you have. If you're using Outlook 2010 or newer, you can determine the type of account this way:

1. In Outlook, click **File** in the Ribbon and then click Account settings > Account settings.
2. The Account Settings dialog box, E-mail tab, shows the type of account you are using.



Further, you can tell which format your files are stored in by just clicking the Data Files tab and hovering over the data file. In the example below, you can see **.ost** at the end of the file path.



## Archiving in Outlook

Archiving is a way to reduce the size of your Outlook Data File when the amount of email you keep starts to tax your computers resources, causing it to slow down. Unlike a traditional backup in which a copy is made, archived items are moved to a separate Outlook Data File and set aside to be accessed when needed. Even if you are using an Exchange account (OST), the files will archive to a PST file.

**Note:** archived files do not sync with the server or your other devices.

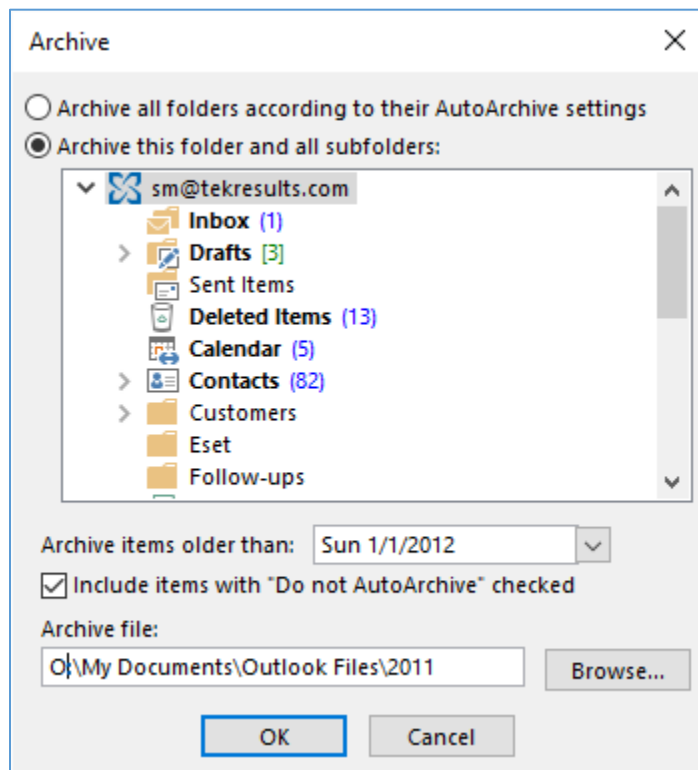
By default, Outlook does not have an archive file, one has to be created manually. Once the file has been created, you'll need to check the AutoArchive settings to see if the default settings meet your needs. Here are the instructions for how to do so in

- [Outlook 2010](#)
- [Outlook 2013 and later](#)

## Archiving strategy

If you have a lot of old email, we recommend splitting the archive into years.

1. Follow the steps above for the version you have to create an archive.
2. Select: **Archive this folder and all subfolders.**
3. Click on the top level folder to select the entire mailbox rather than the currently selected folder.
4. Set the **Archive items older than:** date to the 1st of January of the year after you want to create your first archive for. The rest of these steps demonstrate how to archive mail from 2011 and earlier. So if you want to create your first archive for 2011 and previous, set the date to the 1st of January 2012.
5. Optionally, check the option: **Include items with "Do not AutoArchive" checked.**
6. Specify a name and a location for your PST file for 2011. Make sure that this is a location on your local computer and not a network share.  
Example: D:\Documents\Outlook Files\2011.pst



7. Click **OK**.

After archiving has finished, repeat the above steps but specify a different date in step 4 and a different name in step 6. Repeat this until you have all your old mail stored by year.

## Appending your archive

You can append to an existing archive file. If you don't change the file name and location of your archive, future archives will append to the existing file.

## Restoring archived files to the server

If, for some reason, you need to put all, or some, of your Exchange or IMAP archived messages back on the server you can do so easily.

In the Outlook navigation pane (left panel), locate the Archive folder as well as the Inbox for your active Exchange or IMAP account (this won't work with POP accounts).

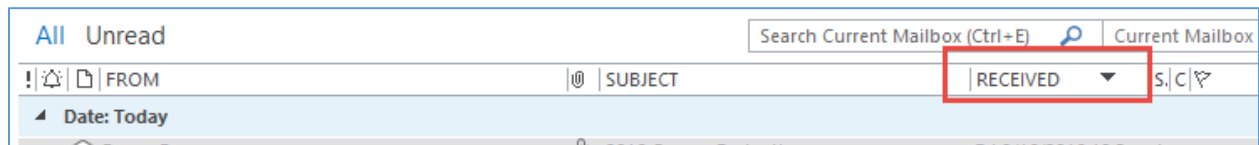
Drag the messages you want to restore from the archive folder into the active Inbox – or better still – create a new subfolder for the active Inbox and move them there.

Before you do this, consider that restoring your archived messages may bloat your active Inbox. In some cases, this may put you over your mailbox size limit. At the very least, it will probably slow Outlook down since it is designed to work with mailboxes 2GB or less. Do this at your own risk.

## Rearranging archived files

If you have already archived all your files and you would like to organize them more efficiently, the easiest way to do it is to create a new, empty archive file and name it according to your new organizational strategy – Maybe something like **Archive 2010 to 2011** if you want to move messages from that date range into the file.

Both your original archive file and the new archive file should appear in your Outlook navigation pane. You can then drag and drop messages from the original archive folder into the new one. If you're moving messages based on their received date, just go to the original archive folder and click on the header for the **Received** column. This will place your messages in date order. Click the header again to reverse the order.



Once the messages are in date order, select the messages you want to move and just drag them to the new archive folder.

Tip: You can select multiple messages at the same time by clicking on the first message and then **Shift+Click** on the last message. You can drag multiple messages to the new location.