

The Archives of the Episcopal Church
Records Retention Policy
Addendum: Email Management
Microsoft Outlook Email

A. Background Information

One way Microsoft “archives” email messages is through PST files (Personal Storage Table). PST files appear in Outlook as “Personal Folders” or “Archives Folders” on a local drive. PST is the format used to store data on a local drive. It is also the format applied when users either manually archive their inbox, or use Outlook’s AutoArchive feature. PST files hold emails, contacts, notes, to-do lists, calendars, and other Outlook data. *Because a PST file is a single data file, the format allows files to grow rapidly and to significant sizes.* The user should limit the size of each PST; depending on the version of Outlook used, the limit varies from 2 GB to 20 GB.

Outlook will encourage you to save your messages using the AutoArchive feature. While this method is convenient it creates large and unstable files overtime. We recommend, therefore that users manage their email records manually for the stability of their saved messages.

The most important information is that PST is *not* an archival format. Email files must be converted from PST to another format in order to ensure long-term preservation. Your responsibility is to create a set of dated back up copies of the PST file. Archivists will be better able to perform a conversion of the PST file if the user follows these interim solutions or work-arounds to manage their Outlook email records.

B. Versions of Outlook

Complicating email retention is that users employ multiple versions of Outlook. The settings for PST files vary among versions. PST files of versions before 2003 have a different format and a smaller overall size limit than more recent versions. No matter which version, users should avoid reaching the PST file size limit. We recommend creating multiple, smaller PST files to avoid the danger of file corruption, loss of messages, and slower access times.

1. PST files created in versions earlier than Outlook 2003 can be especially volatile. *Note: Please consult the Archives for special assistance dealing with pre-2003 Outlook email files.*
 - it is safest to limit each PST file store to under 1.8 GB
2. For Outlook 2003 and later, users should be prepared to back up their PST files regularly. To be safe, the Archives recommends a monthly manual backup routine for Outlook emails.
 - it is safest to limit each PST file store to under 15 GB
3. It is best practice to start a new PST file store before the file size reaches the size limit for your version of Outlook. If you are uncertain about how to start a new PST file store, contact the Archives.

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C. Backing up and copying your PST files

It is crucial to regularly back up email records in a location other than your Outlook folder, for example, a separate directory on your file server, a CD/DVD, or an external drive. The following instructions will help Outlook users to backup their PST files. If you have already exceeded the safe limit, you will need conversion software to save your email files.

PST Backup: Some Questions to Guide Yourself

Where can I find my PST files for Outlook 2003-2007?

1. Right click on Personal Folder (sometimes named Archive Folder).
2. Select "Properties for..." and a dialog box will appear.
3. Select "Advanced" (lower right).
4. You will see a file path in the advanced dialog box. This path name shows the location of the PST files.
5. Note or copy out the file path. Be sure to close Outlook before proceeding.

How can I simply go about determining the size of my PST file to check that I have enough capacity for an external drive storage device (CD/DVD, jump drive, flash drive)?

1. Select the PST file in your Outlook folder navigation window (the "Personal" or "Archive" Folder).
2. Right click on the file title.
3. Select Properties.
4. Click on the Folder Size and verify that your external drive will accommodate a copy.

How do I transfer files for Outlook 2003 and Outlook 2007?

1. Use Windows Explorer ("My Computer") to navigate to the file location.
2. You should be looking at your PST files. (Check to be sure that you closed Outlook.) Select the PST (*.pst) file and copy it.
3. Navigate to your removable media and paste the PST file.
4. Be sure to rename the file with a current date in the file name.
5. The backup file is your raw master file. Retain this file even if you need to make additional copies.
6. If your church organization has a file server, be sure to place a copy on your directory there.

How do I contact the Archives of the Episcopal Church?

You may email any questions to the Archives at research@episcopalarchives.org. Please allow up to 12 business days for a response.