

TITLE – Saving & Archiving Email
AUTHOR – Alicia A. Slade
PUBLICATION – Pennsylvania Family Lawyer
ISSUE / DATE – March 2007

Internet access and email correspondence is changing how companies do business. One of the biggest challenges facing firms is what to do with email messages after they have been read or sent. Most firms want to keep a copy of the email, similar to any other piece of correspondence to/from a client, opposing council, etc. So, what is the best way to store the email to be able to reference it in the future?

Many attorneys create sub-folders in their 'In-box' with client or matter names. When they receive an email, they move it to the appropriate sub-folder. The problem with this method of storing email is that the number of emails in your 'Inbox' and 'Sent Items' just keeps growing and growing. If you do not delete or archive email from your 'In-box', 'Sent items', and 'Trash', you will not only slow down your email client, such as Microsoft Outlook, but you can also grind it to a halt with too many emails. It is extremely difficult to determine the exact number of emails that will cause a crash, since each email is a different size and the number of attachments and the size of the attachments vary. However, if you are not saving, deleting and archiving emails, it may just be a matter of time before it happens to you.

A better method for storing email is to save a copy of the email within your client folder structure where you save other correspondence for the client/matter, similar to how you save your Word documents. To do this, create a folder called EMAIL under each of your client/matter folders. For example: S:\Clients\Smith; John\Email.

Your emails will be stored in the same folders that you save all of your other client/matter documents. You will be able to save the emails and later open them to read them. When there is an attachment on an email, the attachment must be saved separately. The original name of the attachment will be in the saved email file.

When you have an email open or are highlighted on an email in Microsoft Outlook, select the File drop down menu, then select Save As. A Save As dialog box will appear and in the Save In box you can navigate to the appropriate folder where you would like to save the email. The File Name box will have the subject line of the original email as the name of the file. The file name can be changed to something meaningful. For example: 2007-02-01 Response to Settlement Offer.

The Save As Type will be preset based on the format of the email message the sender sent to you.

- Text Only will save the email as a .TXT file. The email will open as a text file when read.
- Outlook Message Format will save the email as a .MSG file. When you select the file, it will open Outlook to read the file.
- HTML will save the email as a .HTM file. The email will open as an HTML document when read.

You can change the format of the message to the type you prefer. Then click the Save button. To begin saving emails, you should practice by saving a few in different formats and then open the saved email files. You will be able to see what the different formats look like. The original email will still be in Microsoft Outlook until you delete it. If you highlight several email messages at one time and then select File, Save As, all of the emails will be saved in one file.

Along with saving the email messages, you should also archive emails. Microsoft Outlook has a built-in archiving feature which will remove old items from the mail server or your email client and store them in an 'Archive' file located on the C:\ drive of your local PC. These archived items can then be burned to CD/DVD periodically for storage and removed from the local PC as well.

To archive emails, it is first helpful to know what the default aging is for emails. According to Microsoft's Help File for Outlook, the default aging period for the 'Inbox' is 6 months, the 'Sent items' is 2 months, and the 'Outbox' is 3 months. Any created sub-folders will have a 6 month aging period. The email message receive date or the last modification date determines the age of the email. To setup the archive folder and archive file name, do the following:

1. Go to the 'File' menu, then click on 'New' then select 'Outlook Data File'.
2. Select 'Office Outlook Personal Folders File (.pst)', then click on OK.
3. Keep the default location of the file, but make the filename 'Archive.pst' instead of 'Personal Folders.pst'
4. This will open the 'Create Personal Folders' window, in the Name field, type 'Archive', then click OK.
5. Now you will have a new set of folders in your Folder List where you can begin to archive old items.
6. You will need to create the folders which you wish to use to archive old messages into. For instance, you should create a 'Sent Items' folder and any others that you plan to archive.
7. Now you can manually move messages from the real 'Sent Items' folder, into the Archive 'Sent Items' which will remove them from the server and place them on the local hard drive into the new .pst file you just created.
8. You should check to be sure that the default settings for Auto Archiving are set to move messages to the correct place. Go to the 'Tools' menu, then into 'Options', then 'Other'.
9. You can set the timing and location of the AutoArchive process with this dialog box.
10. You can also set the AutoArchive options individually for each folder to further customize the scheduling and locations of archives on a folder by folder basis.

To get to the archive file, open 'My Computer' then navigate to C:\Documents and Settings\[username]\Local Settings\Application Data\Microsoft\Outlook\. You should see the 'Archive.pst' file in this folder. You can copy the 'Archive.pst' file to CD/DVD or other media.

So, if you have been trying to figure out how and where to store your email messages, try using the email saving method above. Also, take steps to start archiving your emails. You will prevent running into issues with your email client and you will be able to access all of your emails easily, just like your other client/matter correspondence.

Alicia A. Slade is the President & CEO of Plummer Slade, Inc. Plummer Slade has been providing computer networking and business solutions to law firms since 1988.