

## E-mail Retention Methods – Step-by-Step Examples

### Quick Links to Examples:

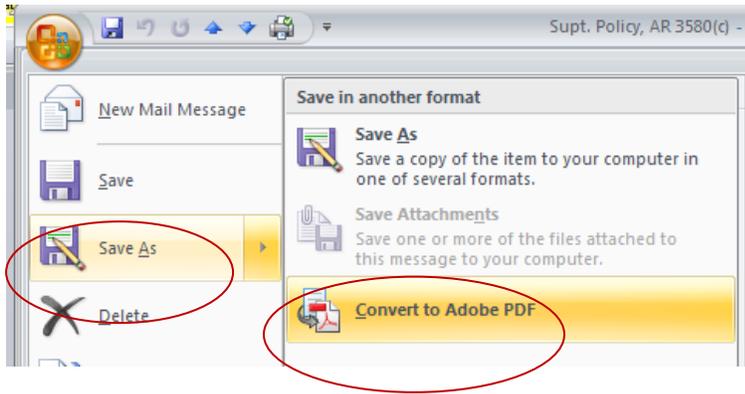
- [Windows XP – Office 2007 – Adobe Pro version 8 and above](#)
  - Converting to PDF
- [Windows XP – Office 2007](#)
  - Converting to text file
- [Windows XP – Office 2007](#)
  - Saving all e-mail attachments in one easy step
- [Windows XP – Office 2003 or Office 2007 – Adobe Pro version 8 and above](#)
  - Converting an entire folder within Outlook Inbox to PDF file
- [Windows XP – Office 2003 or 2007 – Adobe Pro version 8 and above](#)
  - Automate Outlook In-box folder(s) to convert e-mail to PDF and save to targeted folder outside of Outlook
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  - Converting to PDF file
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  - Converting to text file in Internet Explorer, using Outlook Web Access

**Example: Windows XP ~ Office 2007 ~ Adobe Pro ver. 8 and above**

**Converting to PDF:**

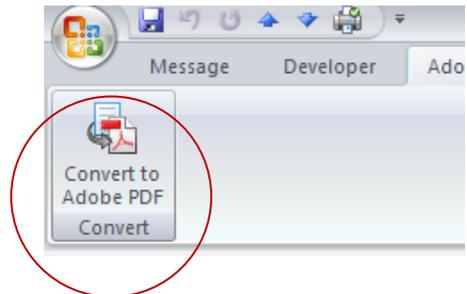
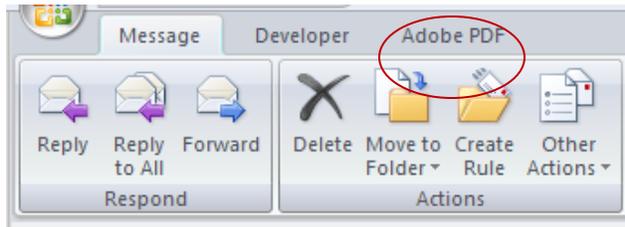
1. With e-mail message open, go to “Save As”, and choose “Convert to Adobe PDF”  
**or**
2. Click on the Adobe PDF tab, and choose “Convert to PDF”.
3. Save subsequent PDF file on network (if available) using standard file-naming convention\*.

1



or

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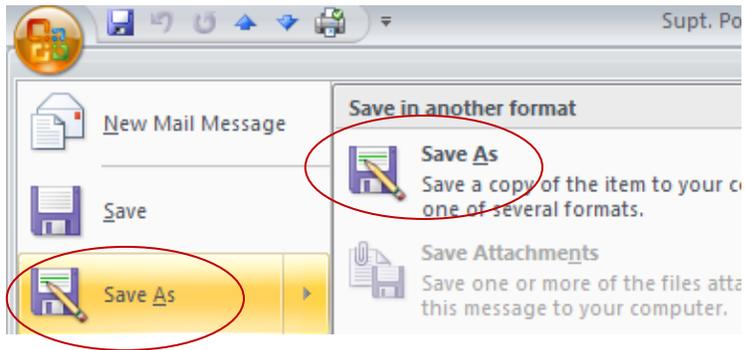


## Example: Windows XP ~ Office 2007

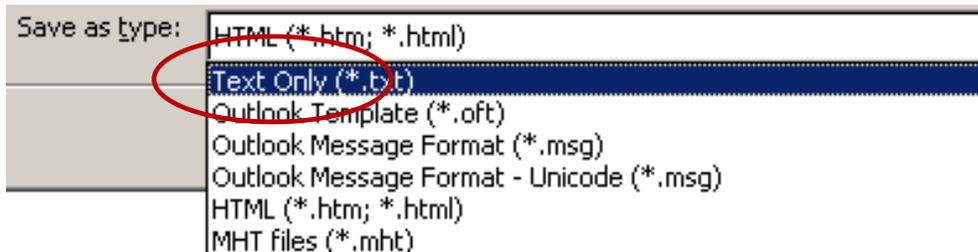
### Converting to Text File:

1. With e-mail message open, go to “Save As”, and choose “Save As”
2. In the resulting Dialogue Box, choose “Text Only” from the “Save as Type” field drop-down.
3. Save subsequent Text file on network (if available) using standard file-naming convention\*.

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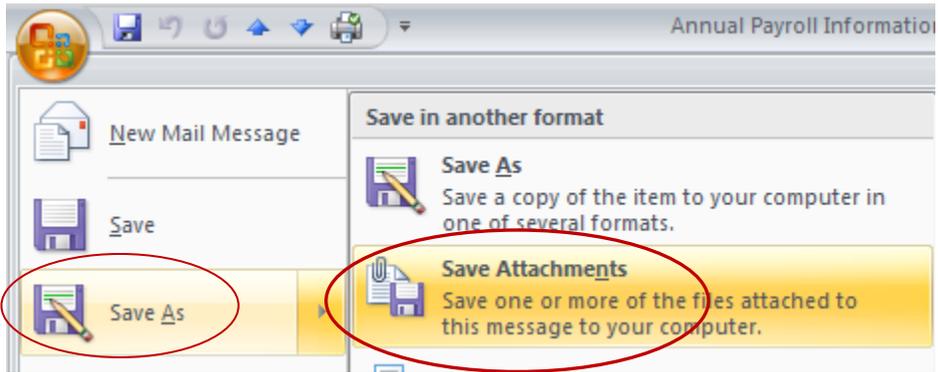
**Example: Windows XP ~ Office 2007**

**Saving all E-mail Attachments in One Step:**

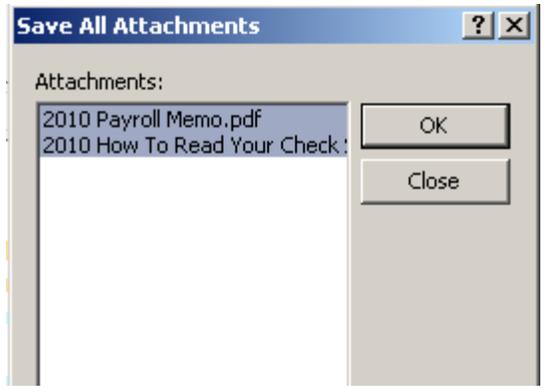
1. With e-mail message open, go to “Save As”, and choose “Save Attachments”
2. In the resulting “Save All Attachments” dialogue box, all attachments from selected e-mail message will be listed and selected; if not all files are necessary to save, un-select as needed, then choose “OK”.
3. In the resulting dialogue box, navigate to the desired folder, then choose “OK”. (Note, at the bottom of the dialogue box, it is not necessary to put in a “folder name”).

All attachments that had been selected are now saved, each in their original format, without the need to open each individual file and go through the “save as” process separately.

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At bottom of dialogue box, it is okay to leave this field blank.



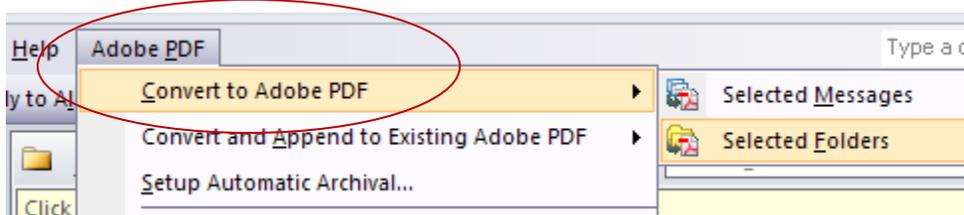
**Converting an Entire Folder within Outlook Inbox to PDF File:**

1. Within folder within Outlook Inbox, and click “Adobe PDF” from toolbar, then choose “Convert to Adobe PDF”, and “Selected Folders”.
2. In the resulting “Convert folder(s) to PDF” dialogue box, ensure desired folder is checked, and choose “OK”.
3. In the resulting “Save Adobe PDF File As” dialogue box, navigate to the desired location on network (if available), using standard file-naming convention\*, and click “Save”.

All messages within the selected converted folder have now been contained into one PDF file.

**Note:** Once the contents of the folder have been converted to PDF and saved outside of Outlook, it will be necessary to go back into the folder in Outlook and **manually delete** all previously converted/saved e-mail messages, as the conversion process does not actually remove the messages from Outlook, but only converts a copy of the messages, and saves as a PDF file in another location as directed.

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**Example: Windows XP ~ Office 2003 or 2007 ~ Adobe Pro ver. 8 and above**

**Automate Outlook In-box folder(s) to Convert E-mail to PDF and Save to Targeted Folder:**

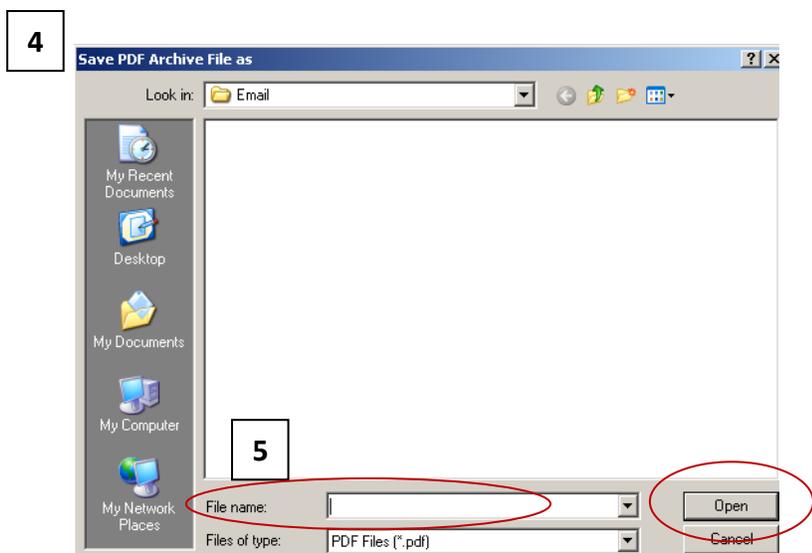
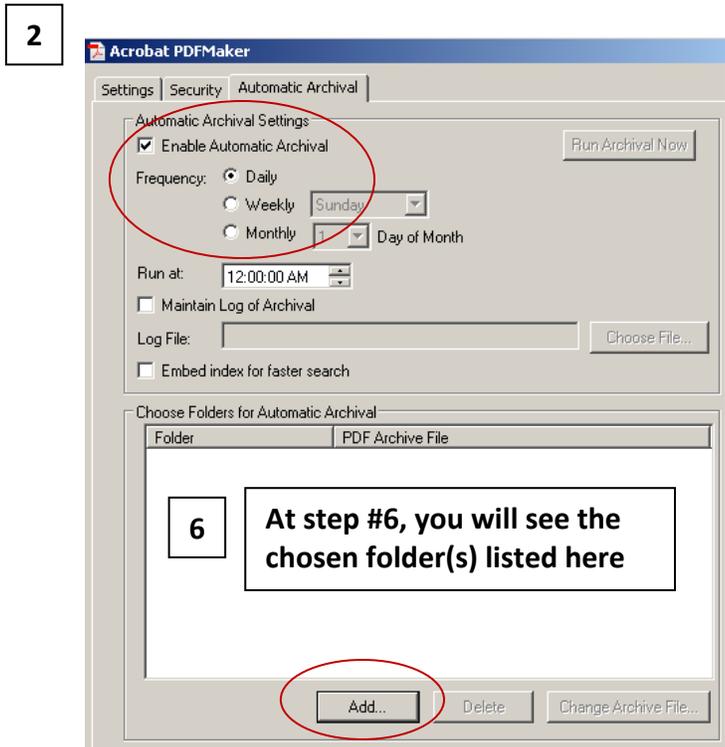
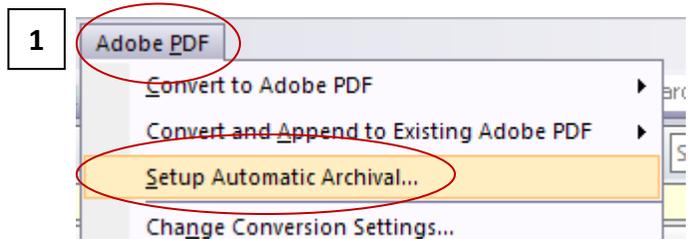
Specified folders in your In-Box can be set up to automatically archive e-mails on a daily basis, converting to pdf, and saving to a targeted folder outside of Outlook.

1. To begin, in Outlook, specify and select a folder under the In-box, then choose "Setup Automatic Archival" from Adobe PDF toolbar drop-down.
2. Check "Enable Automatic Archival" in Adobe PDFMaker dialogue box, choose daily, weekly, or monthly, then click the "Add" button. (monthly is recommended)
3. In the resulting dialogue box, check folder(s) to be archived, then choose "OK".
4. In the "Save PDF Archive File as" dialogue box, navigate to desired target folder, and choose "Open".
5. Next enter a name for the file, then choose "Open" again.
6. In the resulting "Adobe PDFMaker" dialogue box, you should see the chosen folder(s) listed, then choose "OK" to complete set up.

**Note:** Set-up can be modified at any time by choosing the "Setup Automatic Archival" once again, and editing as needed in the resulting dialogue boxes.

Once Outlook has completed the archive/save process as scheduled, it will be necessary to go into the folder in Outlook and **manually delete** all archived/saved e-mail messages to avoid Outlook completing the process unnecessarily on messages already archived.

**Important:** Automatic archival should not be utilized to archive/save all e-mail in your Outlook In-box. This tool should only be used to archive/save specified folders from the Outlook In-box containing e-mail targeted as necessary to archive/save.

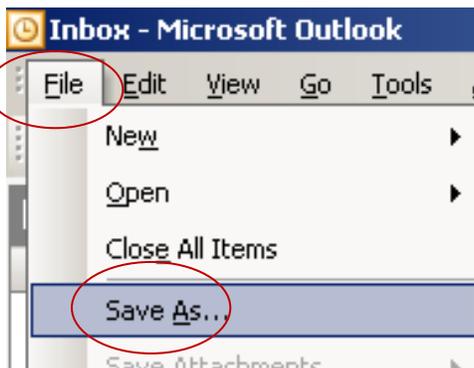


## Example: Windows XP ~ Office 2003 ~ No Adobe Pro

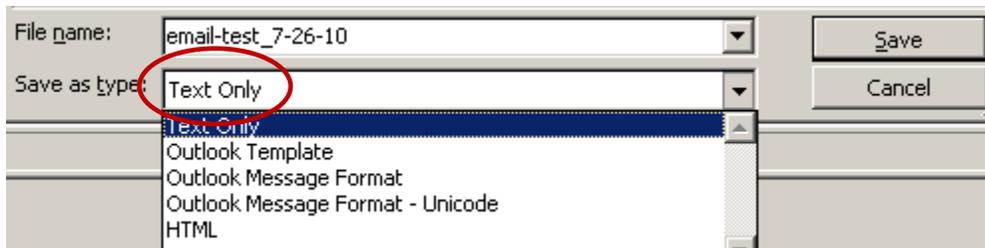
### Converting to Text File:

1. With e-mail message open, or with e-mail message closed and selected, go to “File”, and choose “Save As”
2. In the resulting “Save As” Dialogue Box, choose “Text Only” from the “Save as Type” field drop-down.
3. Save subsequent Text file on network (if available) using standard file-naming convention\*.

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**Example: Windows XP ~ Office 2003 ~ Adobe Pro ver. 8 and above**

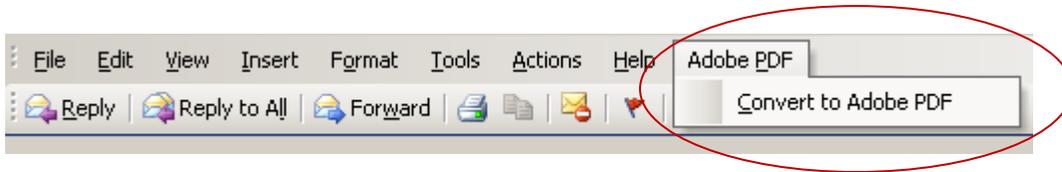
**Converting to PDF File:**

1. With e-mail message open, click “Adobe PDF” in the toolbar.
2. Choose “Convert to Adobe PDF” from the drop-down.
3. In the “Save Adobe PDF File As” dialogue box, save subsequent PDF file on network (if available) using standard file-naming convention\*.

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**Example: Windows XP ~ Office 2003 ~ Microsoft Outlook Web Access ~ No Adobe Pro**

**Note:**

Outlook web access is designed to work optimally with the Internet Explorer browser. If a different browser is utilized for web access (ie: Firefox), certain features in Outlook web access may function differently, or may be unavailable.

