Email Retention Policy Job Aid Outlook on the Web for Business (Office 365)

Procedure

This job aid will demonstrate how to apply a retention policy to an email using Microsoft Outlook on the Web for Business (Office 365). For other clients, please refer to the applicable job aid.

Assign a retention policy email messages

To access Outlook on the web for business, click this link and log in with your SSO credentials.

http://mailbox.lausd.net

1. In the message list, click a message.



Tip: To select more than one message, press and hold CTRL as you click each message.

2. Place your cursor over the message and right-click, then place your cursor over **Assign Policy** . . .

| G Folders | | Inbox | Filter 🗸 | |
|--------------------------------|---------|--|----------|--|
| ∧ Favorites | | Next: No events for the next two days. | 💾 Agenda | |
| Inbox | 4269 | Microsoft Office 303 Team | | |
| Clutter | 1 | lly r | | |
| Sent Items | | 7 this email in your prowser | Reply | |
| Drafts | | Reply all | | |
| SADA Admin | | v this em Forward | | |
| Inbox | 4269 | Delete | | |
| Test | 1 | Archive | | |
| Test 2 | | 'k Mark as unread | | |
| Clutter | 1 | lausd.net Pin | | |
| Drafts | | Flag | | |
| Sent Items | | Mark as junk | | |
| Deleted Items 7 | | Move to Clutter | | |
| Archive | | Ignore | | |
| Archive1 | | Move | > | |
| Conversation | History | Categorize | > | |
| Junk Email | 2 | Create rule | | |
| Notes | | View message d | etails | |
| RSS Feeds | | led to the Assign policy | > | |
| | | Mission and Office 2005 | | |



or

Click **More Commands icon** in the ribbon, and place your cursor over **Assign Policy**. NOTE: If the **Assign Policy** command is missing from your More Commands menu, please contact your LAUSD Exchange administrator.

| ⊕ New ♥ | Move to 🖌 Categori | es ✓ ···· |
|---|----------------------|--|
| Inbox Next: No events for the next two days. | Filter ∨ ॑ Agenda | Mark as unread Mark as read Pin |
| | | Unpin Flag Clear flag |
| See Silve M Standards in Society of accordingly and accordingly server in 1988 (1999). | | Mark complete Move to Clutter Ignore |
| | | Create rule Print Assign policy > |
| Annale, Mart Segular age to Annale Annales I for the Bastroop Minister I for the Bastroop Minister I for the Second Second Second Second | | |

3. Under Labels, select the 4 or 7 year retention policy.





The retention policy for a message appears in the header in the Reading Pane under the recipient names and includes the expiration date. If no retention policy is applied, no information appears under the message recipient names.



Assign a retention policy to an email folder

1. In the Navigation Pane, right-click a mail folder, then place your cursor over **Assign Policy**.

| Test | 1 no-rep | бу ба | 1 Section |
|------------|----------------------|----------------------------------|-----------|
| Test 2 | Create new subfolder | facety flat togeth up to blacked | |
| Clutter | Rename | | |
| Drafts | Delete | | |
| Sent Item: | Empty folder | | |
| Deleted It | Add to Favorites | | |
| Archive | Move | | |
| Archive1 | Mark all as read | | |
| Conversat | Assign policy > | | |
| Junk Emai | Permissions | | |
| Notes | | | |
| RSS Feeds | | | |



| Test | 1 по-тертуши | Westman Agent 42 North allow | Service . |
|-------------------|----------------------|------------------------------------|-----------|
| Test 2 | Create new subfolder | | ۱ |
| Clutter | Rename | | |
| Drafts | Delete | | |
| Sent Items | Empty folder | | |
| Deleted Items | Add to Favorites | | |
| Archive | Move | | |
| Archive1 | Mark all as read | | |
| Conversation Hist | Assign policy > | Archive policy | |
| Junk Email | Permissions | ✓ Use parent folder policy | |
| Notes | | Retention policy | |
| RSS Feeds | | ✓ LAUSD 4 Year Retention (4 years) | |
| | | LAUSD 7 Year Retention (7 years) | |
| | | Use parent folder policy | |
| | | | |
| | | | |

2. Under Retention Policy, select the 4 or 7 year retention policy.



Tip: By default, all messages are set to **Use parent folder policy** until you select a new retention policy for that message.

For More Information

Visit <u>http://achieve.lausd.net/emailretention</u> for more information about the policy, including retention rules and details on the exemption process.