Email Retention Policy Job Aid Outlook 2010

Procedure

This job aid will demonstrate how to apply a retention policy to an email using Outlook 2010. For other clients, please refer to the applicable job aid.

Assign a retention policy email messages

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. On the Home tab, in the Tags group, click Assign Policy.



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





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



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.

🖏 🗙 🇞 • Delete	Reply 🙀 Reply 🙀 Reply All	 Participation Partici	× •	Move	₹ Tags	Editing	Zoom	
Delete	Respond	Quick Steps	15	Move			Zoom	
From: Fo:	C Real Low 3				Sent:	Tue 6/22/	9:38	AN
LC:								
LC: Subject:	testing							-
LC: Subject: test	testing							

Assign a retention policy to an email folder

- 1. In the Navigation Pane, click a mail folder.
- 2. On the ribbon, in the Tags group, click **Assign Policy**, then click **Set Folder Policy**.





3. Click the **Policy** tab, then click the drop-down arrow for **Folder Policy**.

	Accessing Property		×							
	General	Home Page	AutoArchive							
	Policy	Permissions	Synchronization							
	Retention Policy									
	Items in this folder use the policy that is defined here unless the item is assigned to a different policy.									
l	Folder Policy: Use Parent Folder Policy									
	Use Parent Folder Policy									
	LAUSD 4 Year Retention (4 years)									
	LAUSD 7 Year Retention (7 years)									
		ОК	Cancel Apply							

4. Select the 4 or 7 year retention policy, then click Apply, then OK.





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.