

Email Retention Policy Job Aid

Outlook 2016

Procedure

This job aid will demonstrate how to apply a retention policy to an email using Outlook 2016. For other clients, please refer to the applicable job aid.

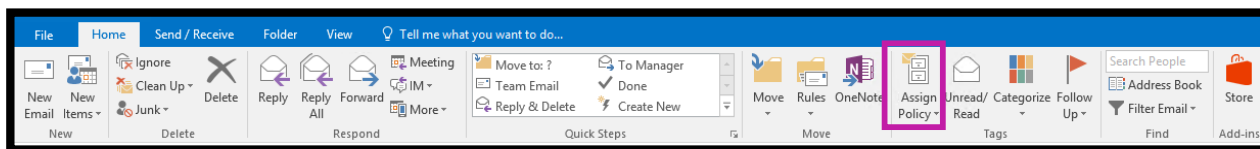
Assign a retention policy email messages

1. In the message list, click a message.

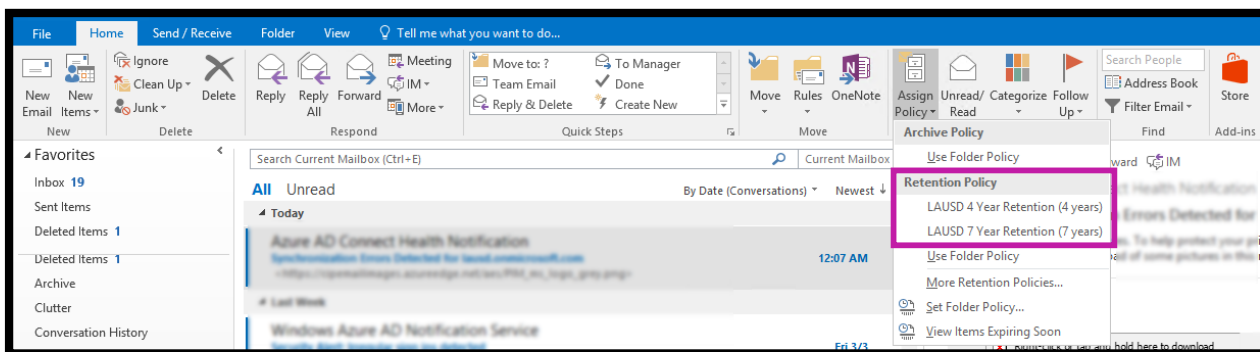


Tip: To select more than one message, press and hold CTRL as you click each message.

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.

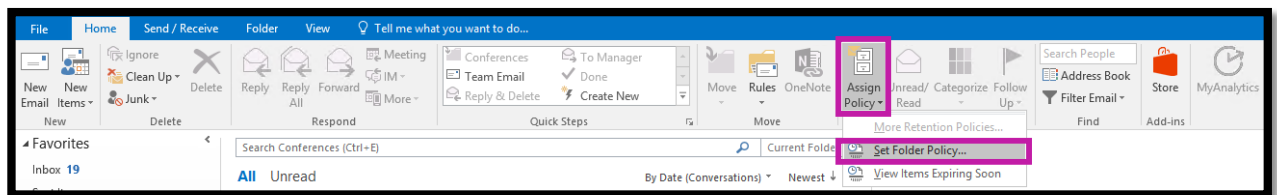


The retention policy for a message appears in the header in the Reading Pane under the recipient names and includes the expiration date. If no retention policy is applied, no information appears under the message recipient names.

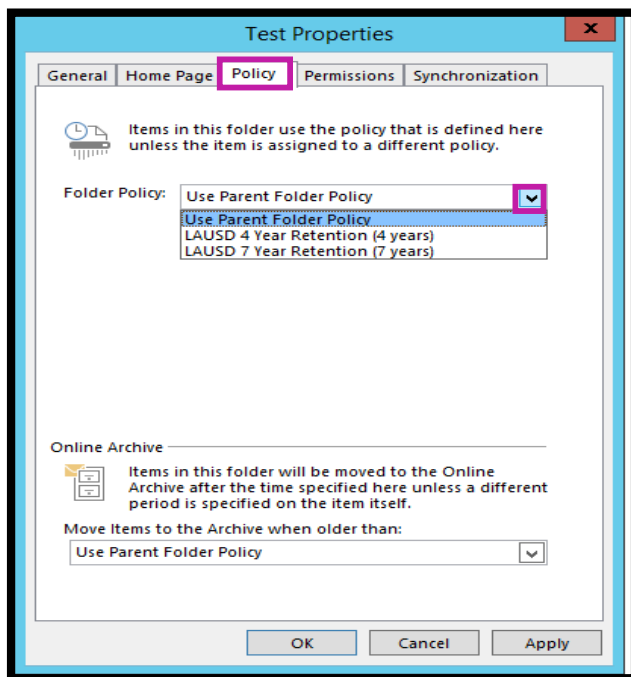


Assign a retention policy to an email folder

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**.

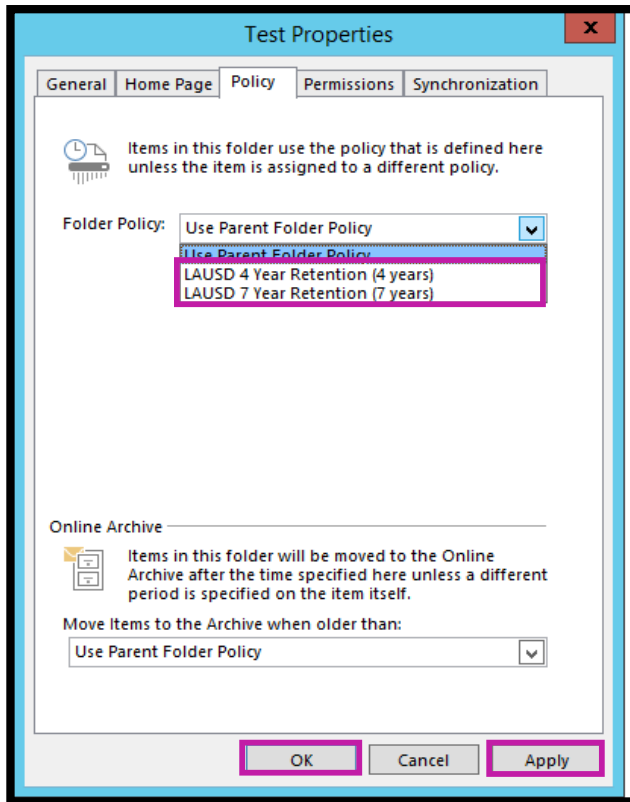


3. Click the **Policy** tab, then click the drop-down arrow for **Folder Policy**.





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



For More Information

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