

Email Archive Procedure

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Email Archive Procedure

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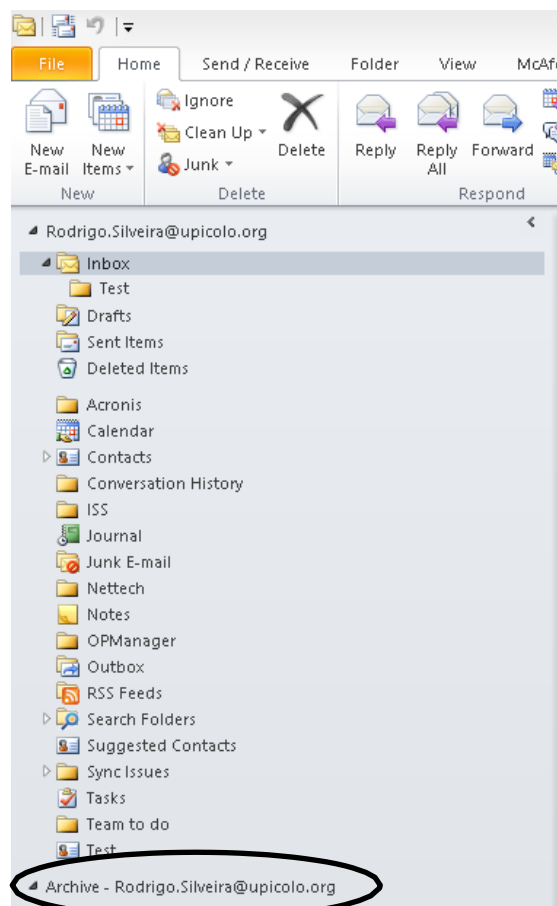
Introduction

Microsoft Exchange has a new online email archive feature. The benefit to using this feature is that it will assist you in managing, organizing, and saving your important emails. These archived emails will now also be available through the Outlook Web App application.

This document covers how to use the email archive feature. It will explain how to archive emails manually or automatically. If the automatic process is used and once the setup is complete, further intervention by the user to archive or delete emails may not be required.

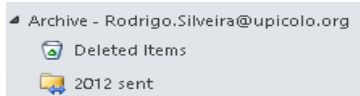
How to Use Archive

1. Manual Archival
 - 1.1. An Archive location has been added to your Outlook. It looks like an additional mailbox linked to your Outlook, but the name is distinctive as “Archive – mailbox name”.



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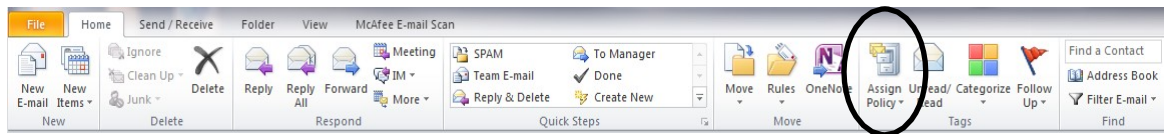
- 1.2. To manually manage your archives, folders can be created under Archive. Drag and drop emails to these folders.



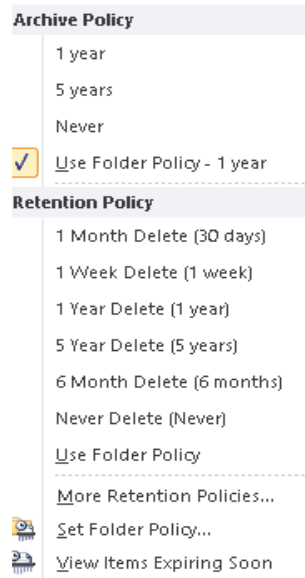
2. Automatic Archival (Recommended)

- 2.1. In this option, you will be able to assign Archive and Retention policies. The Archive policy is to be used to move emails to Archive after a certain period of time. The timeframe choices for archiving are 6 months, 1 year, 2 years, 5 years, or never. The Retention policy is to be used to delete your emails after a certain period of time. The timeframe choices for deleting emails are 1 month, 6 months, 1 year, 2 years, 5 years, or never. Even with policies in place, you can still drag and drop emails from your mailbox to the archive folders.

- 2.2. Apply an Archive policy to a folder in your mailbox by selecting the folder. The following screen shots are for the "Inbox" folder. Click on the "Assign Policy" button on your Outlook ribbon.



- 2.3. Select an Archive and Retention policy.

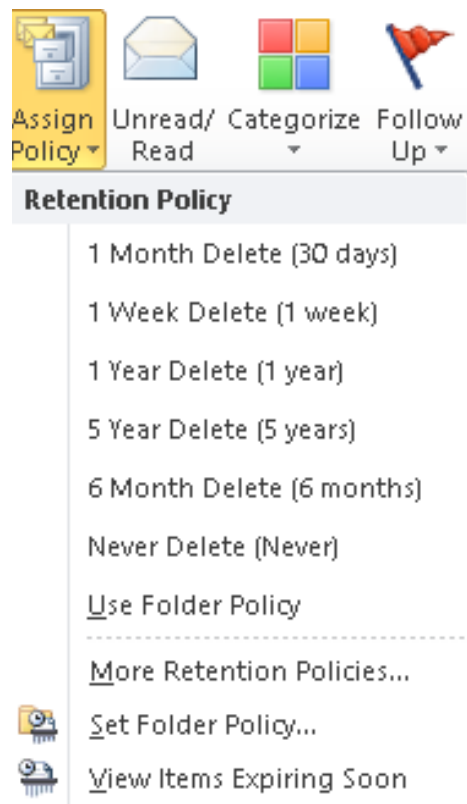


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- 2.4. Once your archive and retention policies are selected, your emails will be automatically archived and deleted according to the policy.
- 2.5. Your mailbox folder structure will automatically be replicated in Archive to accept your archived emails.



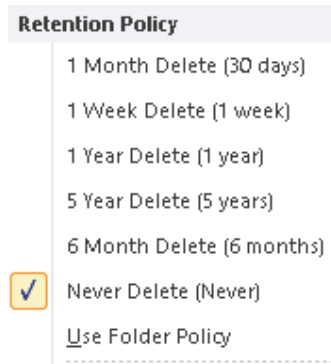
- 2.6. You can also set a Retention policy to automatically delete emails from your Archive. Select the desired archive folder and click on the “Assign Policy” button on your Outlook ribbon. Since the folder is already in Archive, you will see only Retention policy options.



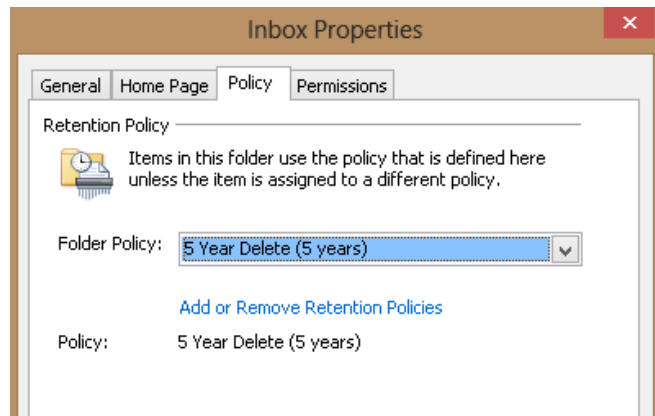
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3. Review or Change Archival Policies

- 3.1. There are two methods to review or change the existing policies on the mailbox or archive folders. The first method is to select the folder and click on the “Assign Policy” button on your Outlook ribbon. The check mark will appear next to the applied policy. Select a new policy, if a change is needed.

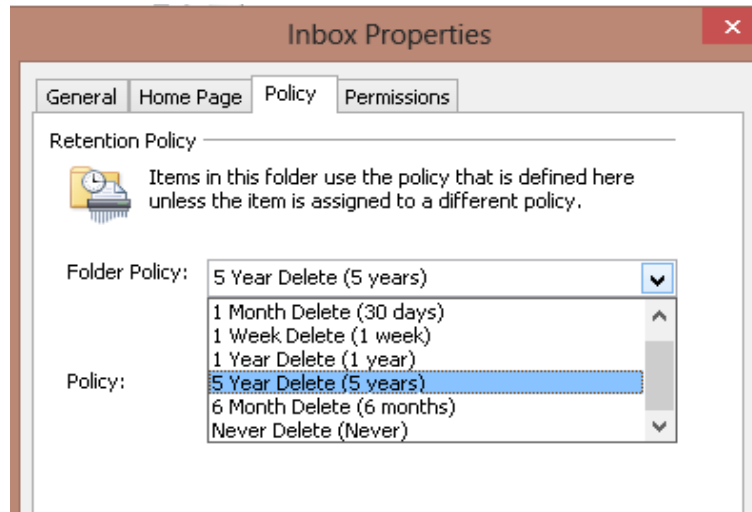


- 3.2. The second method is to right-click on the folder. Select Properties and then select the Policy Tab.

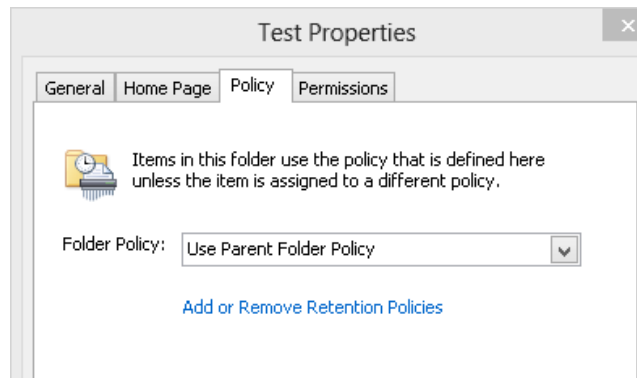


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- 3.3. To change the policy, click on the Folder Policy drop-down menu and select a different policy.



4. Subfolders and Emails
 - 4.1 When a policy is applied to a folder, subfolders and emails will inherit or receive the same policy. If a different policy is required for a subfolder or a specific email, it can be added.
 - 4.2. Right-click on the subfolder or email and select the policy tab.



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- 4.3. On the Folder Policy drop-down menu, change the option from “Use Parent Folder Policy” to the policy needed.

