

SOP - CHANGE THE RETENTION POLICY FOR AUTO-ARCHIVING

The **default (Parent folder policy)** retention period to automatically moves older email messages to the Online/In-Place Archive mailbox is set to **six months**. Email message items older than 6 months will automatically move from the Primary mailbox to the Online/In-Place Archive mailbox.

To change the 6 Month retention period, follow the Standard Operation Procedure depending on which version of Outlook is in use.

1 Outlook (Classic)

1.1 Procedure

Step 1: Open Outlook Classic

1. Launch Microsoft Outlook (Classic).
2. Wait for your mailbox to fully load.

Step 2: Select the Mail Folder

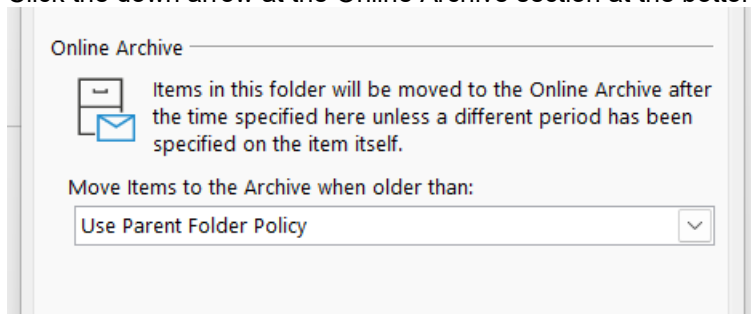
1. In the folder pane / left navigation pane, select the Primary mailbox or a folder you want to apply the policy to (e.g., Inbox, Sent Items, or a subfolder).
2. Right-click the folder.

Step 3: Open Retention Policy Settings

1. Select Data File Properties / Properties.
2. Click the **Policy** tab.

Step 4: Change the Retention Policy

1. Click the down arrow at the Online Archive section at the bottom



2. Choose another Retention period and click Apply.

Step 5: Save the Changes

1. Click **OK** to close the properties window.

Step 6: Allow Processing Time

1. Microsoft Exchange will automatically process the retention policy.
2. Emails older than 6 months will be moved to the **Online Archive mailbox**.
3. Processing may take several hours to a few days.

1.2 Verification

Check the folder for the applied policy indicator.

Open Online Archive – Mailbox Name in Outlook.

Confirm that emails older than 6 months are being moved.

2 New Outlook

To guide users on how to apply a retention policy that automatically moves older email messages to the Online Archive mailbox in New Outlook.

2.1 Procedure

Step 1: Open New Outlook

1. Launch New Outlook.
2. Sign in with your work or school account if prompted.

Step 2: Select the Folder

1. In the Folder Pane, locate the folder for which you want to change the retention policy (e.g., Inbox, Sent Items, or a custom folder).
2. Right-click the folder.

Step 3: Assign a Retention Policy

1. From the menu, select Assign Policy.
2. A list of available retention policies will appear.
3. Select the desired policy (for example, "03 Months - Archive").

Step 4: Save the Change

1. Once selected, the policy is automatically applied to the folder.
2. No further action is required.

Step 5: Allow Time for Processing

1. The retention policy is processed automatically by Microsoft 365.
2. Email items that meet the policy criteria will be moved to the Online Archive mailbox.
3. Processing may take several hours or days depending on mailbox size and system schedules.

2.2 Verification

1. Right-click the folder.
2. Select **Assign Policy**.
3. Confirm that the correct retention policy is selected.
4. Check the **Online Archive** mailbox periodically to verify that older emails are being archived.