

Applying Retention Policies to Email Folders in Microsoft Outlook 365

Recommendations- Cleaning up your inbox and sent box

1. There should only be unprocessed emails or ongoing tasks in your inbox
2. Sent emails should be filed regularly to ensure important emails are retained
3. Emails should be filed daily or weekly

Recommendations- Processing emails and Identifying Email records

Identifying which emails to keep

Email records are any messages created, sent or received within an email system that are required by the organization to control, support, or document the delivery of programs, to carry out operations, to make decisions, or to account for activities.

Examples of email records are:

- messages that reflect the position or business of the Organisation
- messages that initiate, authorize or complete a business transaction

All emails should be processed in one of four ways:

1. **Delete it** - Emails that don't need to be retained (are not records) should be deleted immediately.
2. **Do it** - Emails with tasks that can be completed in under 2 minutes should **all** be completed by the end-of-day. The email should be filed or deleted immediately after completing the task.
3. **Delegate it** - If the task can be delegated, forward it to the necessary party immediately. If you require a response from the person who you delegated the task to, file the email in a "Hold" or "Pending" folder, so you know that you are waiting on a response. If you do not require a response, file or delete the email immediately.
4. **Defer it** - Emails with tasks that take over two minutes should be filed in an "Answer" folder so that you can return to these tasks when you have the appropriate amount of time to do so. If the task has a deadline or is urgent, flag it as one of your tasks.



Assigning Retention Periods to Email Folders

You are able to assign retention periods to folders in their emails. There are three retention period options for your folders:

- Retain for 4 years from date of email then delete
- Retain for 7 years from date of email then delete
- Never delete

When assigning retention periods to your email folders, please consider the following:

- How long are we required to keep the emails in that folder?
- When you assign a retention policy to a parent folder, all subfolders automatically inherit that retention period; however, you can override this by applying a different retention policy directly to a subfolder (i.e. you can have a main/parent folder with a retention policy of 4 years, and a sub-folder with a 7-year or permanent retention and they will not affect each other).
- Outlook will not delete your folder, but only the emails within them.
- You are only able to assign retention periods to folders you created

Emails must be reviewed prior to their destruction date. The destruction of an email is dependent on the date the email was created or received. Before you apply a retention policy to a folder, you must review two types of emails:

- Emails that will be deleted immediately after you apply a retention policy.
- Emails that will be deleted in the next year, to the end of the calendar year on a daily basis.

If you are going to assign the 4-year retention policy: If today's date is October 31st 2018, emails dated October 31st 2014 and prior will be deleted immediately after you apply the policy. In order to avoid reviewing emails daily beginning November 1st 2018, we strongly recommend you review emails for the remainder of 2014 and all of 2015, which will be deleted through November 1st 2018 to December 31st 2019.

If you are going to assign the 7-year retention policy: If today's date is October 31st 2018, emails dated October 31st 2011 and prior will be deleted immediately after you apply the policy. In order to avoid reviewing emails daily beginning November 1st 2018, we strong recommend you review emails

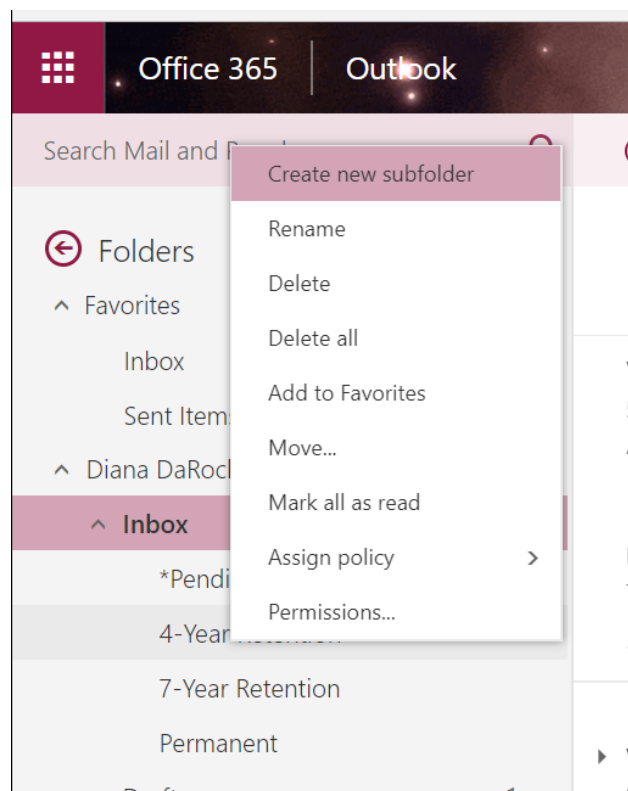


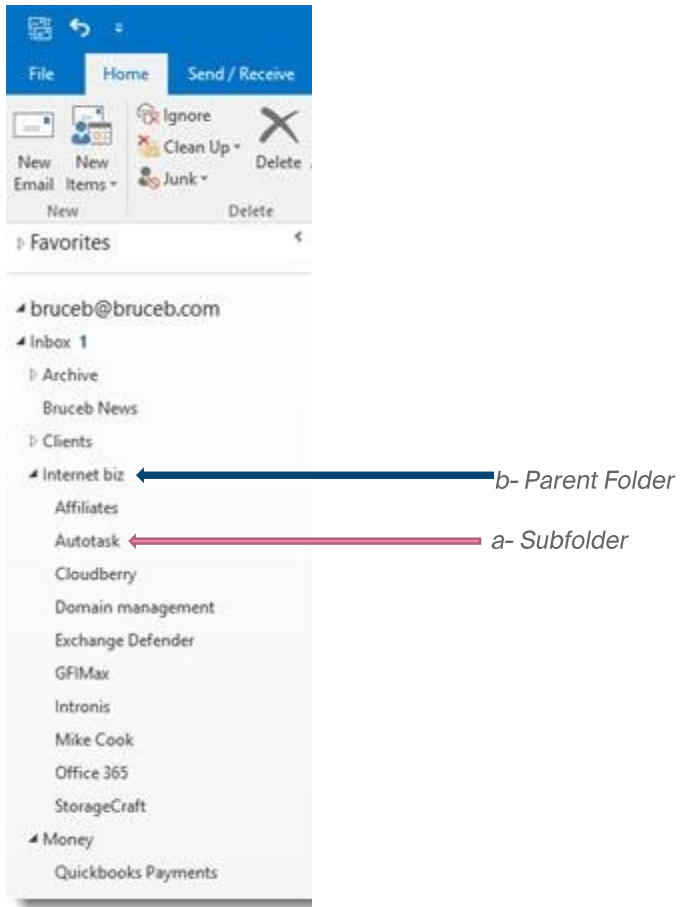
for the remainder of 2011 and all of 2012, which will be deleted through November 1st 2018 to December 31st 2019.

If you have any questions about deciding on retention policies for folders, please contact Diana Da Rocha at archivist@guidesontario.org

Instructions for Applying Retention Policies:

- Right-click on the folder you want to apply the retention policy and hover over “Assign Policy”
- Subfolders will automatically inherit the retention of a parent folder; if you want to apply different retention periods to subfolders within the same parent folder, please apply to each subfolder individually, and **not** to the parent folder
- If you need to create subfolders for a main folder, right-click on the main folder and then click “Create new subfolder”; you will be asked to name your new subfolder:





- Choose between "Retain for 4 years then delete", "Retain for 7 years then delete" or "Never Delete".
- Continue this process for all your email folders.



Office 365 | Outlook

Search Mail and People

New | Mark all as read

Folders

- 7-Year Retention
- Permanent
- Drafts
- Sent Items
- Deleted Items
- Archive
- Conversations
- Junk Email
- Notes
- RSS Subscriptions

Groups

Inbox

Filter

Next: May 2018 Finance Team meeting in 51 min Agenda

Labels

- 1 Week Delete (7 days)
- 1 Month Delete (1 month)
- 6 Month Delete (6 months)
- 1 Year Delete (1 year)
- Retain for 4 years then delete (Can recover for short time) (4 years)
- Retain for 7 years then delete (Can recover for short time) (7 years)
- ✓ Never Delete (Never)
- Use parent folder policy

[Draft] Diana DaRocha

ACL changing roles - email boxes

Thu 10:10 AM

