

# RECORDS RETENTION IN MICROSOFT 365 - OUTLOOK

## ASSIGNING THE CORRECT RETENTION POLICY

### Type of email

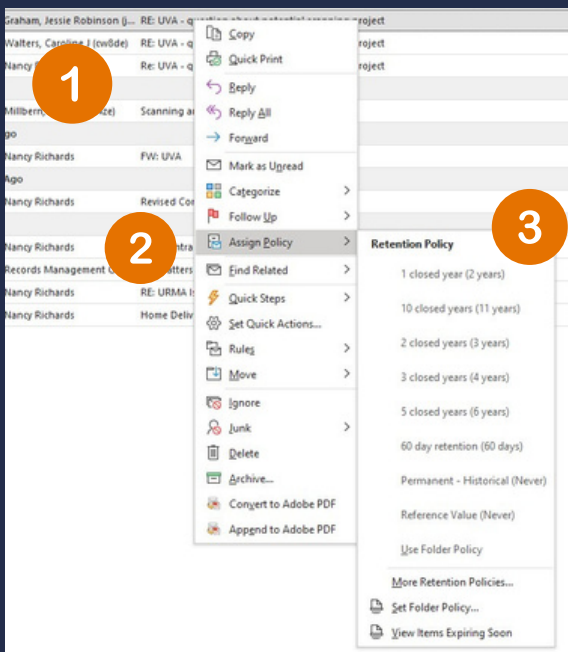
Routine Correspondence  
Direct Correspondence (most employees)  
State/Local Fund Financial  
Academic Advising (undergraduate)  
Sponsored Programs  
Historical Reports/Records

### Assigned policy

60 days  
2 closed years  
3 closed years  
5 closed years  
10 closed years  
Permanent

## ASSIGNING THE POLICY

1. Right click message or folder
2. Select Assign Policy
3. Choose retention length



## TIPS AND TRICKS

Use the **Reference Value** policy to retain emails you need indefinitely. Reassign the emails to other policies as needed.

Click **Assign Policy** and select **View Items Expiring Soon** to see items in the deletion queue.

Use **Retention Schedule Database** to determine retention lengths for records not listed here.