

Creating Retention Rules Using AutoArchive

Purpose

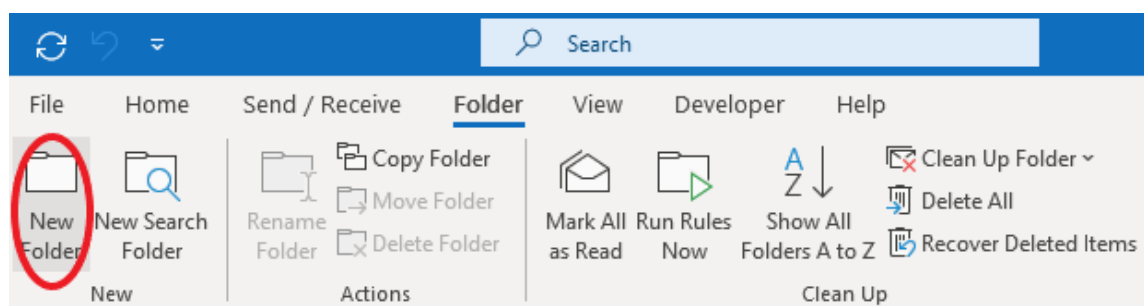
MS Outlook offers records management options for individual users. For UBC FASmail accounts, the ability to create Retention Policies in Outlook is disabled and controlled by administrators. However, by using the AutoArchive function, you can essentially implement retention and disposition policies within your own personal folders.

Always check the UBC Retention Schedules to ensure you are retaining University records for the appropriate period of time. If in doubt contact the Records Management Office at the University Archives.

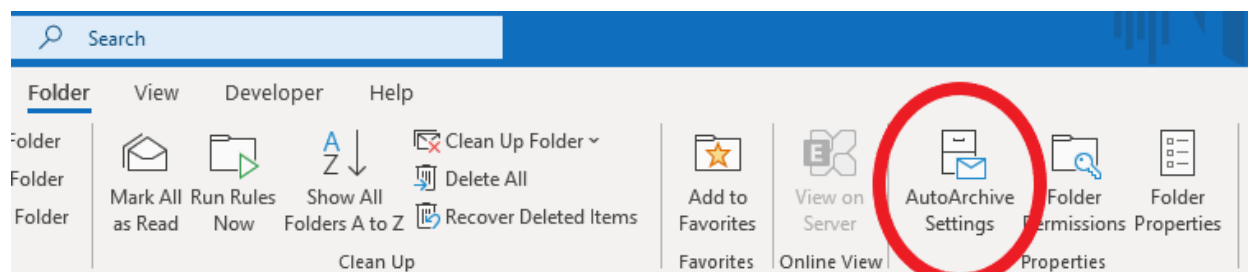
This walkthrough shows a simple way to use AutoArchive for automating destruction of duplicate, transitory, and otherwise unnecessary emails after a set period of time. Having a way to automatically get rid of emails is incredibly important for controlling the overwhelming amount of information accumulating throughout UBC systems.

Walkthrough

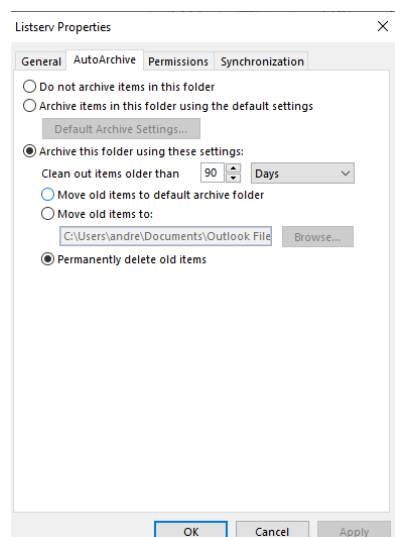
1. Create a folder by selecting Folder from the top navigation bar and clicking New Folder. Name the folder "Listserv". We will be applying the retention rule to this folder. In our *Creating a Rule* info sheet, we set all e-mails sent via specific listservs to automatically enter this folder.



2. Once you have created and selected the folder, go to the top navigation bar, select “Folder”, and choose “AutoArchive Settings”.



3. In the “AutoArchive” tab, select “Archive this folder using these settings”. Set the amount of time that messages in the folder should be kept, and then choose “Permanently delete old items”. In the case of the Listserv folder (and any other transitory information), the retention period is 90 days (or less).



4. Choose “OK”.

Your retention rule is now set up for the Listserv folder using the AutoArchive function. The rule will remove information on the Listserv folder older than 90 days.

Examples

Some examples of other ways you can use AutoArchive:

- A folder called “CC – Read” which holds all emails that you have been cc’ed on and which you have also read. These messages can be deleted after 90 days.
- A review folder for automated messages would also have a retention of 90 days.

For more information

Please see the following for more detailed information on what kind of records to keep and for how long:

- [UBC Records Retention Schedules](#)
- [Email Best Practices](#)

