

One-click Archiving in Outlook

Purpose

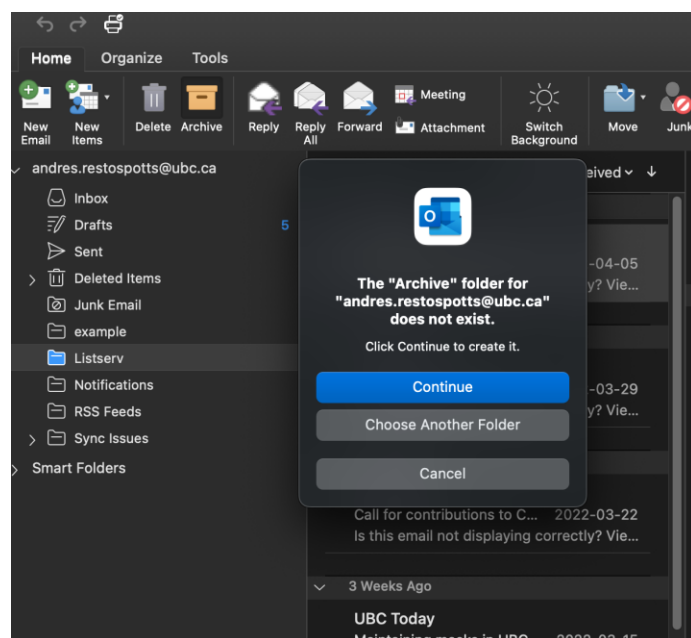
MS Outlook offers records management options for individual users. For UBC FASmail accounts, the ability to create Retention Policies in Outlook is disabled and controlled by administrators. On Mac, Outlook does not have the same AutoArchive functionality that can be used on Windows. Read our [Using Auto-archive functionality](#) onesheet to see how the AutoArchive can be used to automate destruction of email using Windows.

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.

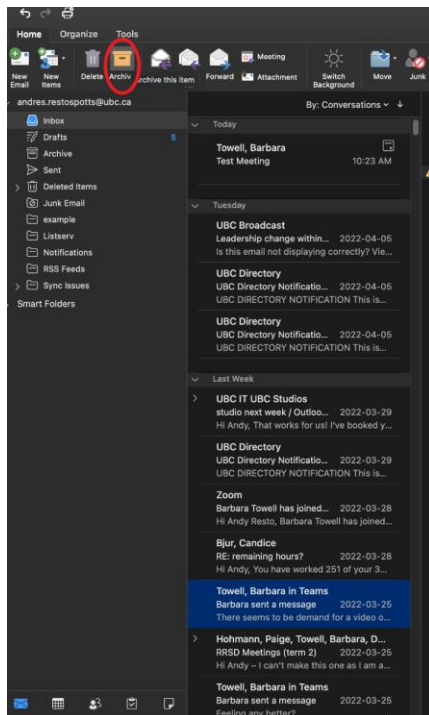
Since archiving through Outlook on a Mac is limited, this walkthrough shows two ways to emulate an archiving process through one-click archiving and by formulating specific rules. Having a separate place to archive duplicate, transitory, and otherwise unnecessary email messages will allow you to develop a regular mailbox cleaning process by deleting all the contents in one go. Getting rid of emails in bulk is incredibly important for controlling the overwhelming amount of information accumulating throughout UBC systems.

Walkthrough – One-Click Archiving

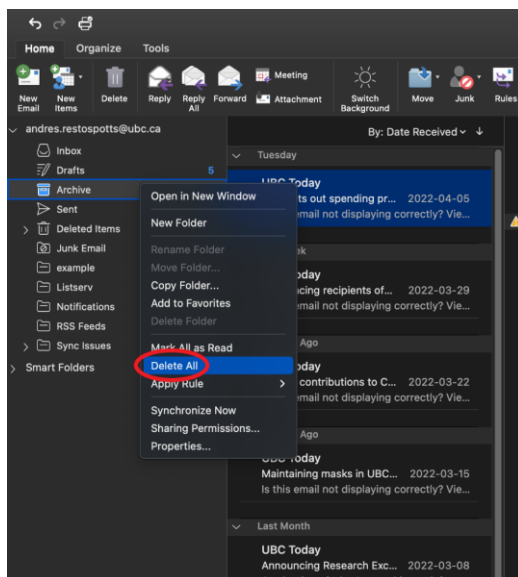
1. When using the Archive function for the first time, you will need to set up your account's Archive folder. On the top navigation bar, selecting the "Archive" icon will bring up a prompt to create the folder. Select "Continue" and your Archive folder is automatically set up.



2. To archive items, select the desired message or messages in your mailbox, and once again click the “Archive” icon. This will send all selected messages to your Archive folder.



3. To clear the folder, right click and select “Delete All” from the menu.



Though not as dynamic as using AutoArchive in Windows, the one-click archive function on Mac can be an effective tool to manage your mailbox if incorporated into a regular workflow.

Create an Archiving Rule

As mentioned above, Outlook for **PC users** offers an AutoArchive function however, where you can essentially implement retention and disposition policies within your own personal folders.

Outlook for **Mac users** does not offer this function. If using a **Mac**, instead of AutoArchive, set up a new rule to delete emails in a given folder after a specified amount of time has passed.

For example, a Listserv folder would have a retention of 90 days.



The screenshot shows the 'New Rule Wizard' dialog box in Outlook. The 'Rule name' field contains '90 day retention: newsletters'. Under 'When a new message arrives:', the condition is set to 'If all conditions are met'. The first condition is 'Folder' is 'Newsletters (emily.larson@ubc.ca)'. The second condition is 'Date Received' is 'Greater Than' '90' 'days old'. Under 'Do the following:', the action is 'Delete Message'. The checkbox 'Do not apply other rules to messages that meet these conditions' is unchecked. At the bottom, the 'Enabled' checkbox is checked, and there are 'Cancel' and 'OK' buttons.

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](#)