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**Guide Name:**

**How to Setup Archive and Deletion Policy for Office 365 Mailbox**

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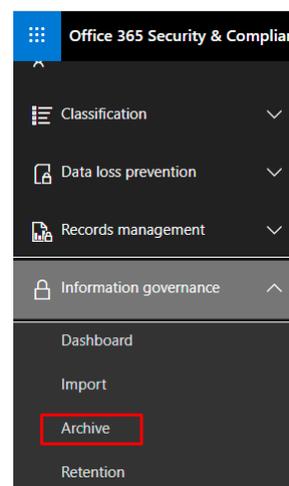
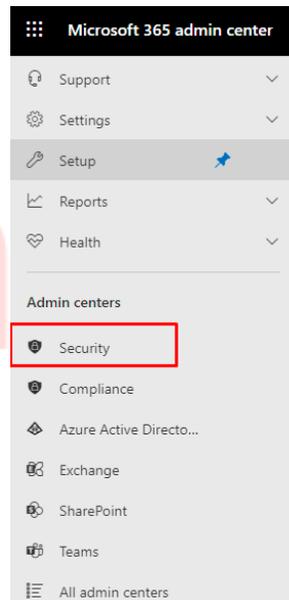
shinJiru

1. Enable Users' Archive Mailboxes
2. Create new Retention tags for Archive & Deletion
3. Create a new Retention Policy
4. Assign new Policy to User Mailboxes

## Step 1. Enabling Archive Mailboxes for User

We are going to enable the Archive mailboxes for the users. To do this, execute the steps as mentioned in sequence:

1. Sign in to your Office 365 account with the credentials.
2. Go to Office 365 Security Center, click Information governance >>Archive.



- Then select the mailboxes whose Archive mailbox is to be enabled and then click Enable archive.

**Information governance** Remove from navigation

Labels Label policies Retention policies Import Archive

Archive mailboxes provide additional email storage for the people in your organization. Using Outlook or Outlook Web App, people can view messages in their archive mailbox and move or copy messages between their primary and archive mailboxes. After an archive mailbox is enabled, messages might be automatically moved to the archive mailbox based on the archive settings configured in the default Exchange retention policy that's assigned to every mailbox in your organization. [Learn more about archive](#)

↓ Export Refresh **Enable archive** 1 of 36 selected Search Group

Name	Email address	Archive mailbox
Abi	abi@ditaselia.my	Disabled
Adam Lee	adam.lee@ditaselia.my	Enabled
<input checked="" type="checkbox"/> Ahmad Faez	faez.is@ditaselia.my	Disabled

- It will ask for the confirmation with a warning message like this:

**Warning** ×

If you enable this person's archive mailbox, items in their mailbox might be moved to the new archive based on the archive settings configured in the default Exchange retention policy. Are you sure you want to enable this archive mailbox?

**Enable** Cancel

- Once the process is completed, click the Refresh button on top. Your mailboxes are archive enabled now.

**Information governance** Remove from navigation

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Archive mailboxes provide additional email storage for the people in your organization. Using Outlook or Outlook Web App, people can view messages in their archive mailbox and move or copy messages between their primary and archive mailboxes. After an archive mailbox is enabled, messages might be automatically moved to the archive mailbox based on the archive settings configured in the default Exchange retention policy that's assigned to every mailbox in your organization. [Learn more about archive](#)

↓ Export **Refresh** 36 items Search Group

Name	Email address	Archive mailbox
Abi	abi@ditaselia.my	Disabled
Adam Lee	adam.lee@ditaselia.my	Enabled
<b>Ahmad Faez</b>	<b>faez.is@ditaselia.my</b>	<b>Enabled</b>

## Step 2. Creating Retention Tags for Archive and Deletion Policies

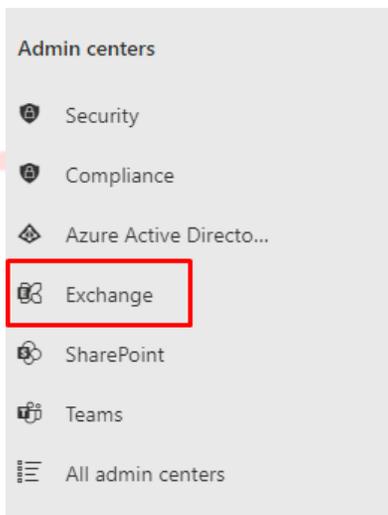
We are going to create three types of retention tags for the new retention (Archive and Deletion) policy in this step. Let us assign a common name (as per your choice) for these retention tags. Here, we are using Kernel.

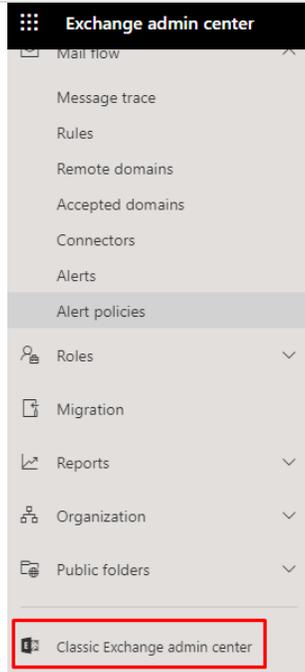
- Kernel 3 year Move to Archive (Custom Archive Policy)
- Kernel 7 year Permanently Delete (Custom Deletion Policy)
- Kernel Deleted Items and Allow Recovery 5 years (Custom tag for Deleted items folders)

### Kernel 3 year Move to Archive (Custom Archive Policy)

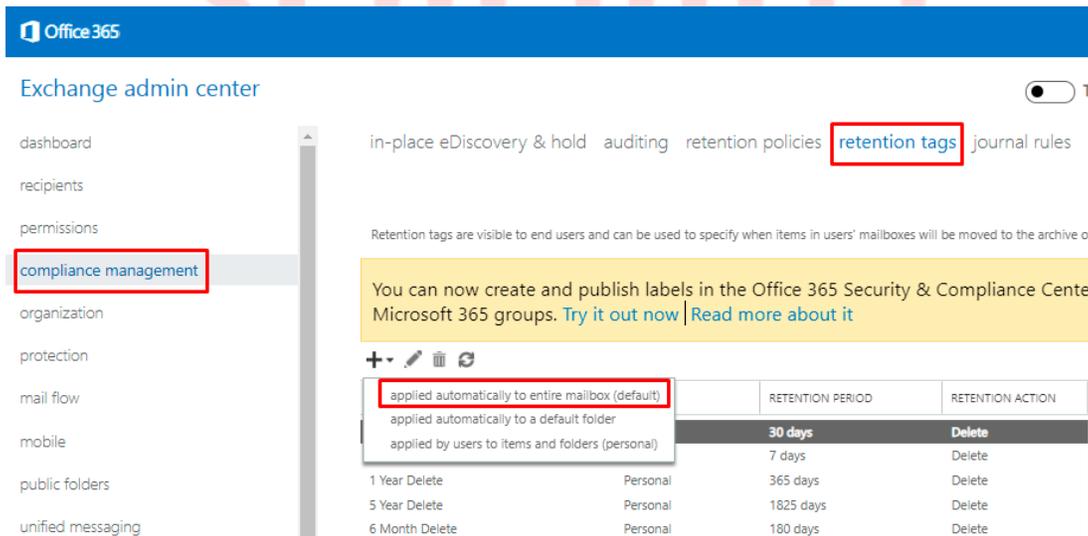
This tag will automatically move items older than 3 years to Archive mailboxes. To create the custom tag, just follow the steps:

1. In the Office 365 admin center, click Admin Centers >> Exchange and choose Classic Exchange admin center.





- In the Exchange Admin Center, go to Compliance Management and click Retention Tags. Click the + button and select the first option applied automatically to entire mailbox (default).



- On the new tag applied automatically to entire mailbox (default) page, provide the required details like Name, Retention action – Move to Archive, Retention period – 1095 days (3 years) with Comment (optional). Click Save to save the entries.

### Kernel 7 year Permanently Delete (Custom Deletion Policy)

This tag will permanently delete items after 7 years. To create a custom retention tag, perform the steps:

1. In Exchange Admin Center>>Compliance Management>>Retention Tags, click the + button and select applied automatically to entire mailbox (default).

		RETENTION PERIOD	RETENTION ACTION
applied automatically to entire mailbox (default)		30 days	Delete
applied automatically to a default folder		7 days	Delete
applied by users to items and folders (personal)			
1 Year Delete	Personal	365 days	Delete
5 Year Delete	Personal	1825 days	Delete
6 Month Delete	Personal	180 days	Delete

2. It will open the page new tag applied automatically to entire mailbox (default). Here, provide Name, select Retention action as Permanently Delete. Enter Retention period as 2555 days (7 years). Then, click Save to save the settings for this Retention tag.

new tag applied automatically to entire mailbox (default)

\*Name:  
Kernel 7 Year permanently Delete

Retention action:  
 Delete and Allow Recovery  
 Permanently Delete  
 Move to Archive

Retention period:  
 Never  
 When the item reaches the following age (in days):  
2555

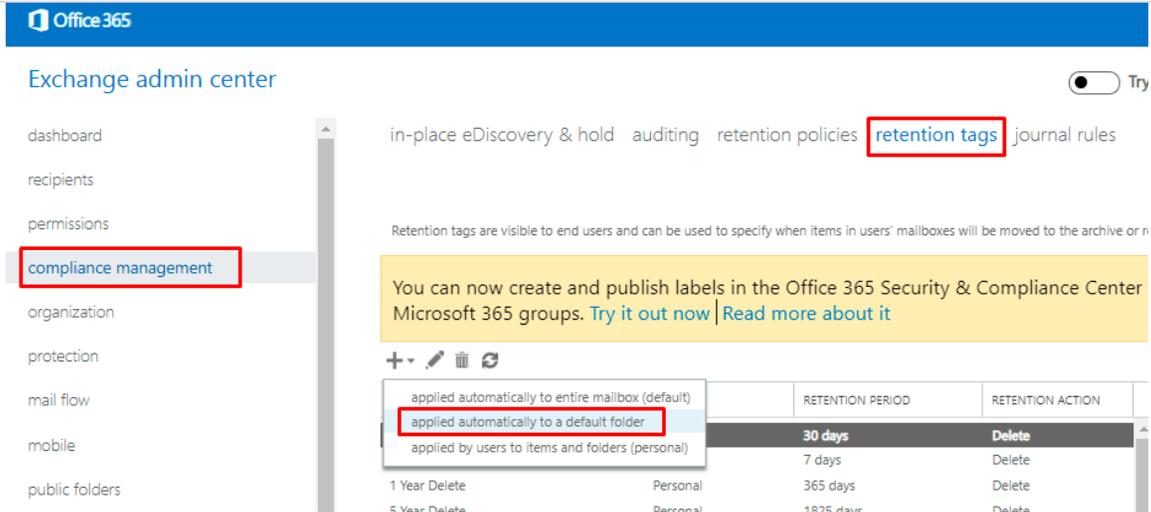
Comment:  
Custom deletion DPT that permanently delete items in the primary and archive mailbox once 7 years old

Save Cancel

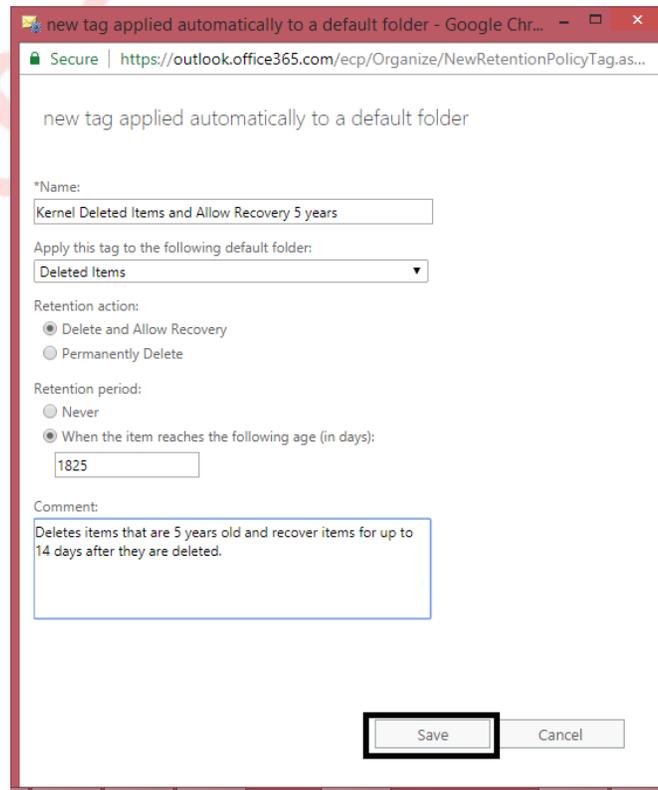
### **Kernel Deleted Items and Allow Recovery 5 years (Custom tag for Deleted items folders)**

This tag will automatically delete folder items after 5 years. It also provides a recovery period in which the user can recover those items with using Recover Deleted Items feature.

1. On the retention tags page, select applied automatically to a default folder option from the list now.



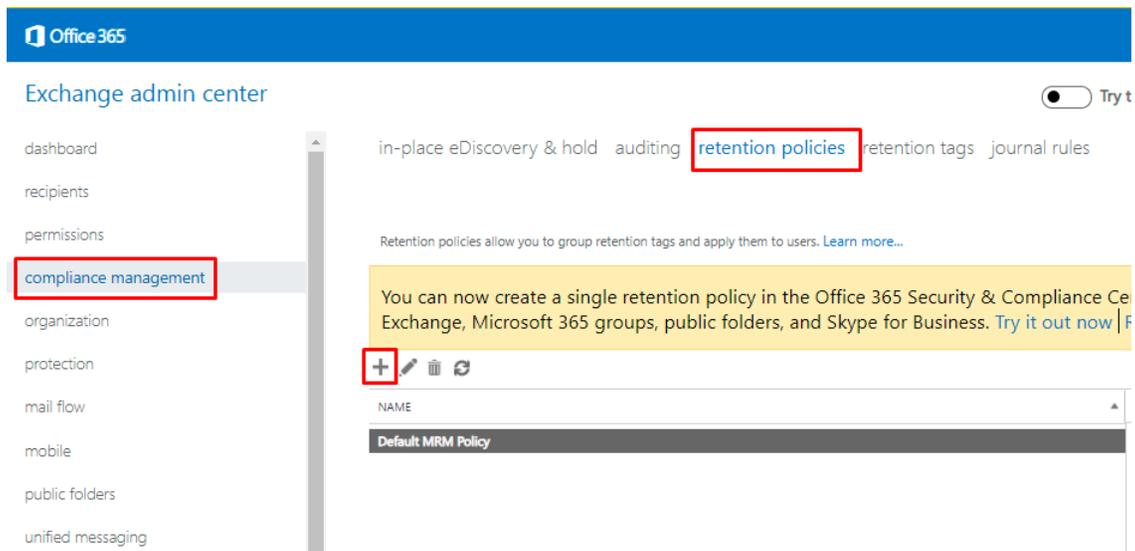
2. A page named new tag automatically applied to a default folder will get open. Provide a Name, select Deleted items from the list, select Delete and Allow Recovery as Retention action and enter 1824 days (5 years) as Retention period. Click Save to create this tag.



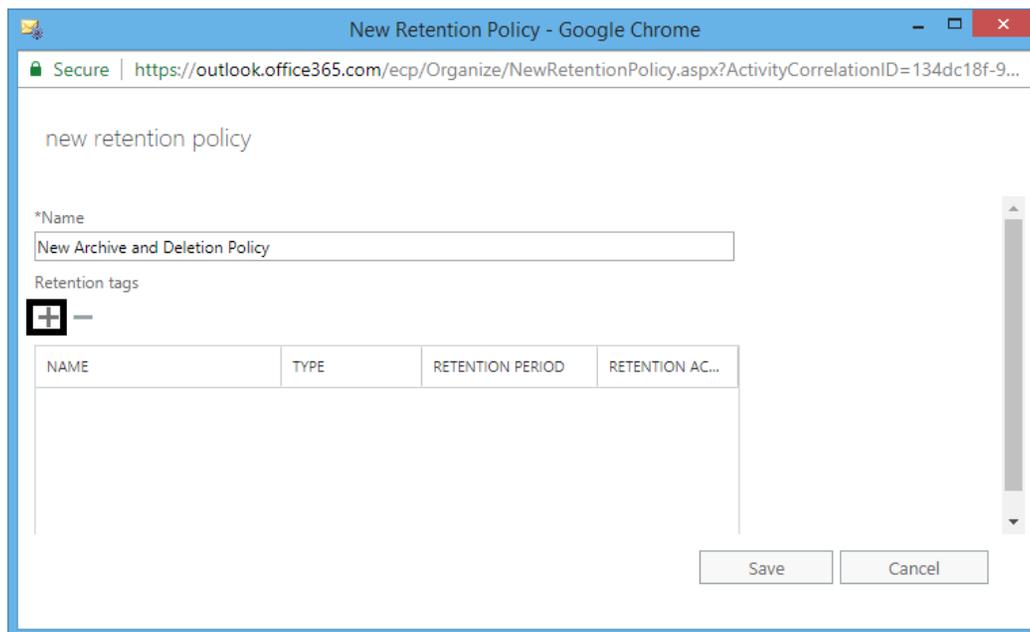
Step 3.

When you create an account in Office 365, a Default MRM Policy is created. You have to create a new retention policy and replace it with the Default MRM policy. After creating a new retention policy, the user has to assign the created retention tags to it. Let us see how to create the retention policy and add retention tags to it.

1. Go to Exchange Admin Center >> Compliance Management >> Retention Policies. Click the + button.



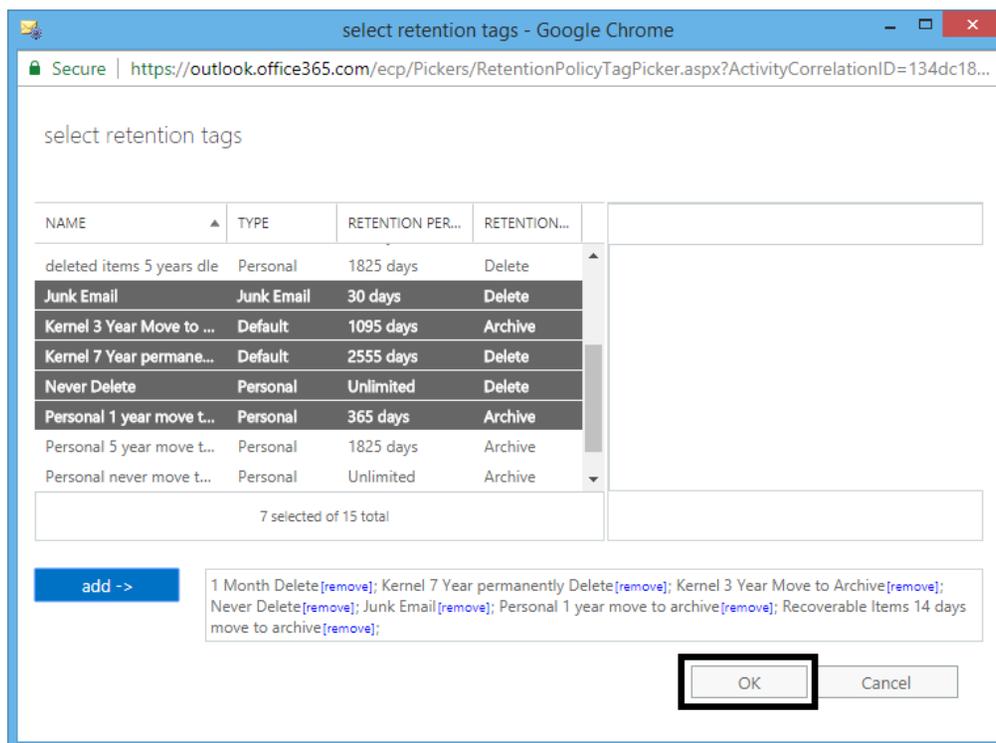
2. In the new retention policy page, enter a Name and then click + (add) button under Retention tags.



3. In select retention tags, select the three newly created retention tags. Along with them, select the following tags:

- Junk Email
- Never Delete
- 1 Month Delete
- 1 Year Delete
- Personal 1 year move to archive
- Recoverable items 14 days move to archive

After the selection, click add option to add the tags. Click OK to save the Retention tags.



4. In the Retention policies page, select your created retention policy and click Save. You can view the tags linked to it within the right pane.

NAME

Default MRM Policy

**New Archive and Deletion Policy**

New Archive and Deletion Policy

This policy contains the following retention tags

- 1 Month Delete
- Junk Email
- Kernel 3 Year Move to Archive
- Kernel 7 Year permanently Delete
- Never Delete
- Personal 1 year move to archive
- Recoverable Items 14 days move to archive

#### Step 4. Assign new Retention Policy to User Mailboxes

This step requires assigning a new retention policy to the user mailboxes of the Office 365 account. Perform the steps below to do this:

1. Navigate to Exchange Admin Center, select Recipients and then click Mailboxes. Select the user mailboxes you want to assign the policy and on right side panel, click More options and click Update for Retention Policy.

Office 365 Admin

Exchange admin center

recipients **mailboxes** groups resources contacts shared migration

DISPLAY NAME	MAILBOX TYPE	EMAIL ADDRESS
Administrator	User (Archive)	Administrator@kerneld.onmicrosoft.com
deepak gupta	User (Archive)	deepak@kerneld.onmicrosoft.com
gaurav kumar	User (Archive)	gaurav@kerneld.onmicrosoft.com
gauravk	User (Archive)	gauravk@kerneld.onmicrosoft.com
Harshal Verma	User (Archive)	Harshal@kerneld.onmicrosoft.com
Indrajeet Singh	User (Archive)	IndrajeetS@kerneld.onmicrosoft.com
john corner	User (Archive)	johncorner@kerneld.onmicrosoft.com
Lahuara	User (Archive)	Lahuara@kerneld.onmicrosoft.com
Lahuara1	User (Archive)	Lahuara1@kerneld.onmicrosoft.com
lamba tarun	User (Archive)	tarun@kerneld.onmicrosoft.com
Michel	User (Archive)	Michel@kerneld.onmicrosoft.com
Philip	User (Archive)	Philip@kerneld.onmicrosoft.com
Rohtas	User (Archive)	Rohtas@kerneld.onmicrosoft.com
Sasaram Jain	User (Archive)	Sasaram@kerneld.onmicrosoft.com
Sasaram_Test1	User (Archive)	Sasaram_Test1@kerneld.onmicrosoft.com
Sasaram1	User (Archive)	Sasaram1@kerneld.onmicrosoft.com

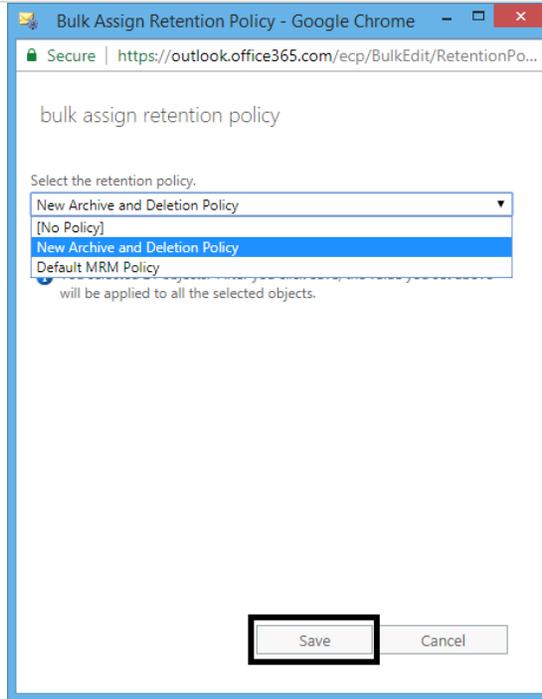
21 selected of 21 total

Need help?

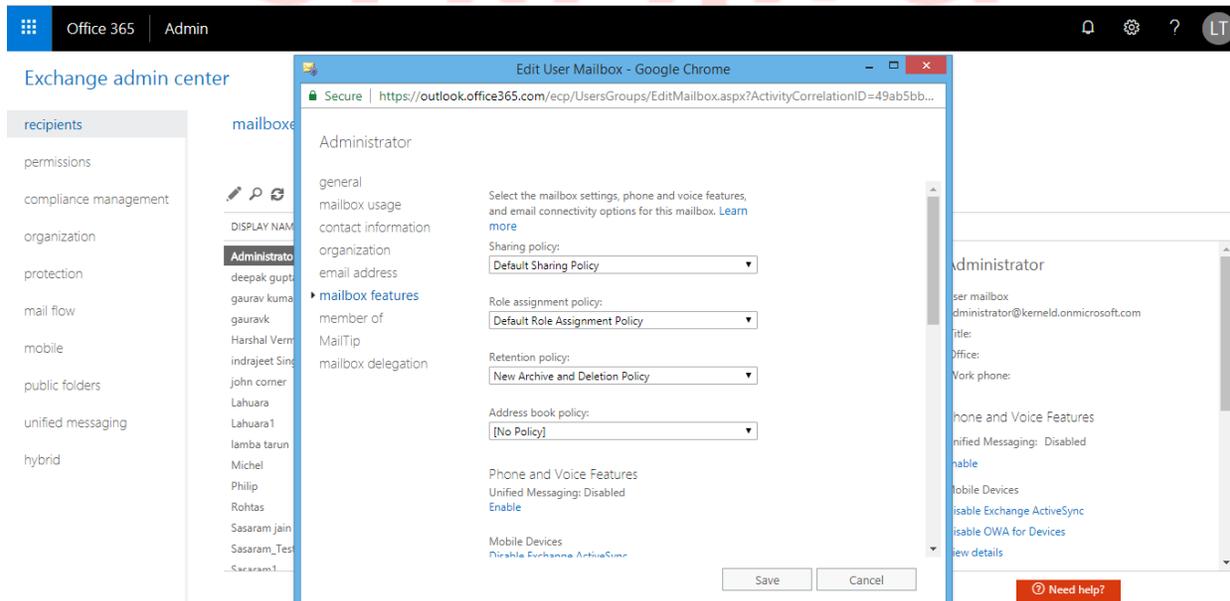
Enable | Disable | Update a policy...

- Archive
- Enable | Disable
- Address Book Policy
- Update...
- Retention Policy
- Update...**
- Role Assignment Policy
- Update...
- Sharing Policy
- Update...

2. On the Bulk Assign Retention Policy page, select your created retention policy from the drop-down list and click Save.



Hence the new Retention Policy is assigned to all the selected user mailboxes. To confirm, go to Mailboxes page, select the mailbox, and click Edit and then on Mailbox features option where you can confirm the assigned retention policy.



We have seen how to setup Archive and Deletion Policy for Office 365 mailboxes. It may take 7 days to for new retention policies to be applied to user mailboxes in Office 365

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