

Microsoft 365

How to Setup Email Archiving
in Microsoft 365



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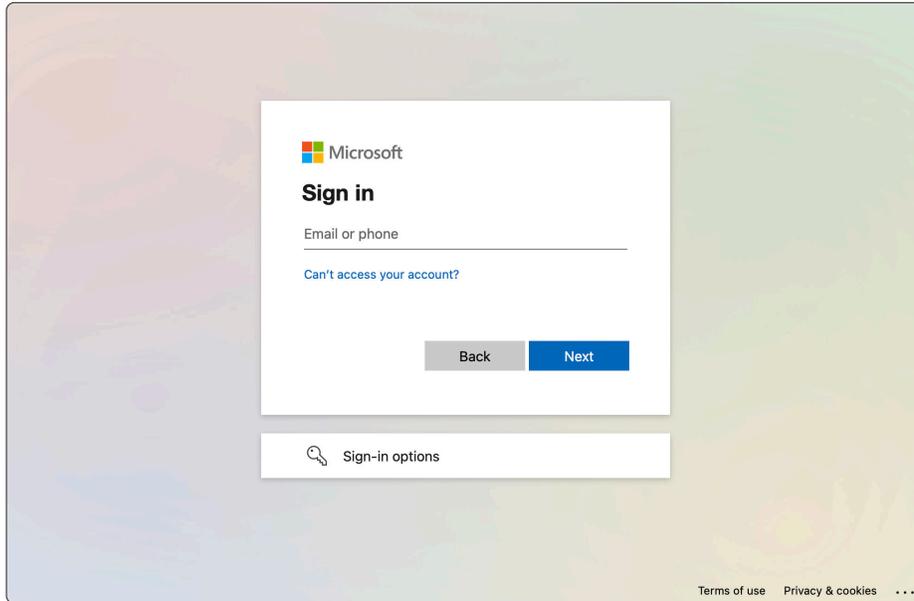
Preface

Email archiving can be enabled for Microsoft 365 to give another 100 GB of online storage of your emails that are not actively needed on a regular basis. This gives you space in your active inbox and folders that are used on a daily and weekly basis. The content can be accessed via the Microsoft 365 portal and/or the Microsoft Outlook for Mac and Windows apps. Once email archiving has been enabled for a mailbox, the online storage folder will be created. Content will gradually be moved over to the archive.

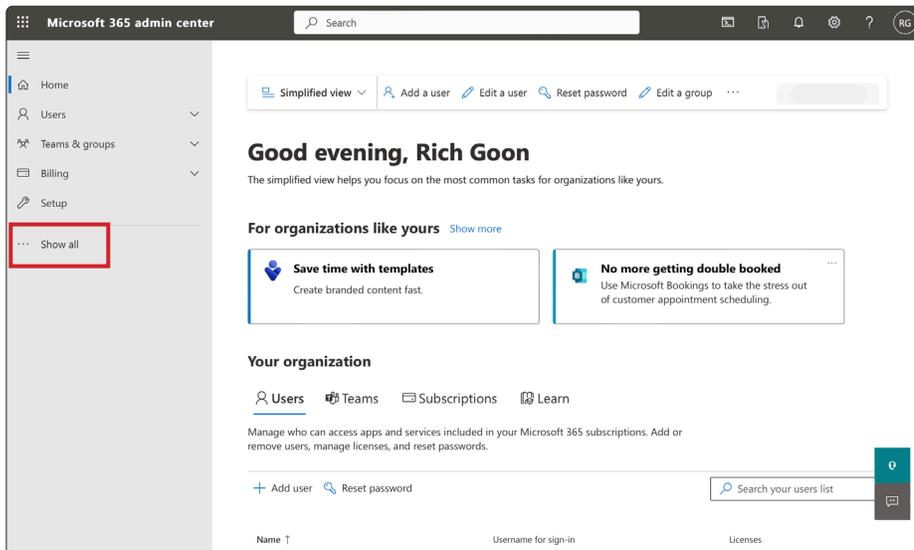


Section 1: Setup your users email archiving in Microsoft 365

1. In a web browser, go to <https://admin.microsoft.com>.
2. Login to your Microsoft 365 Admin account.

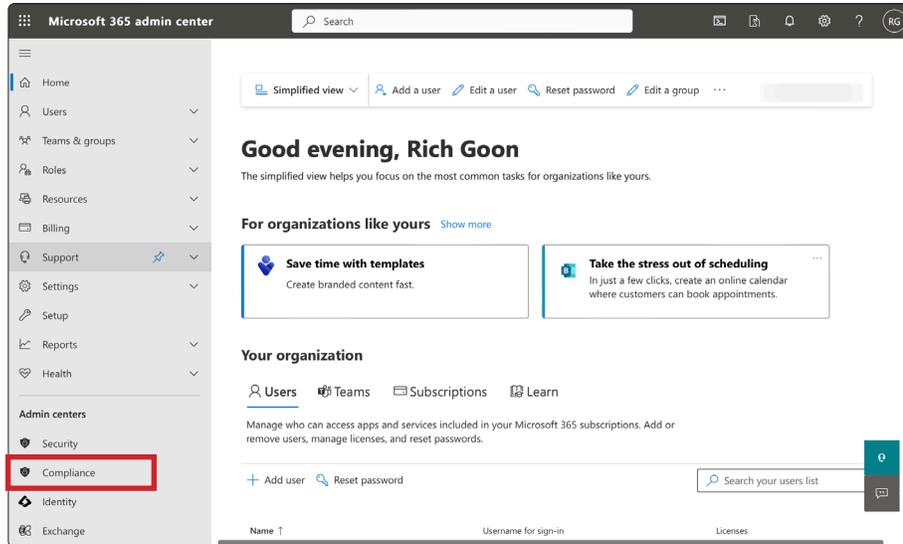


3. In Sidebar, click Show all.

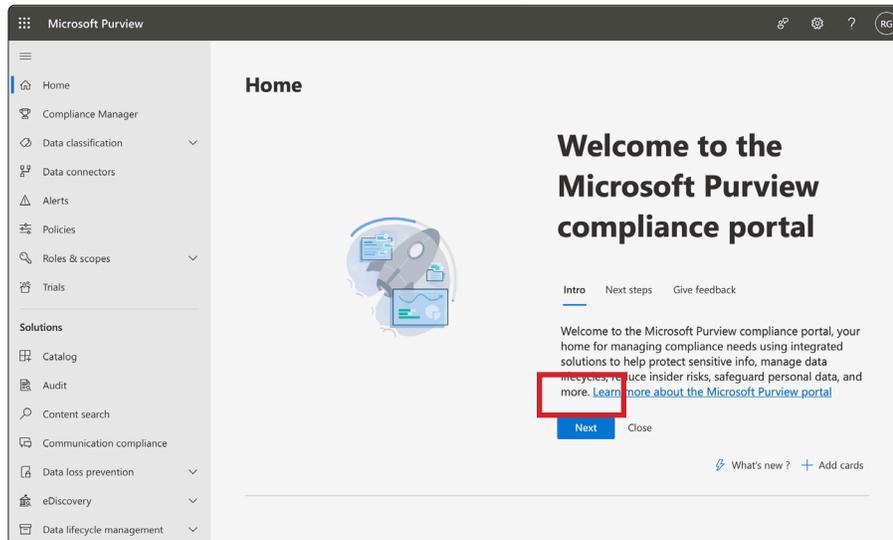




4. In Admin centers, click on Compliance. Be patient, it may take a minute to load.

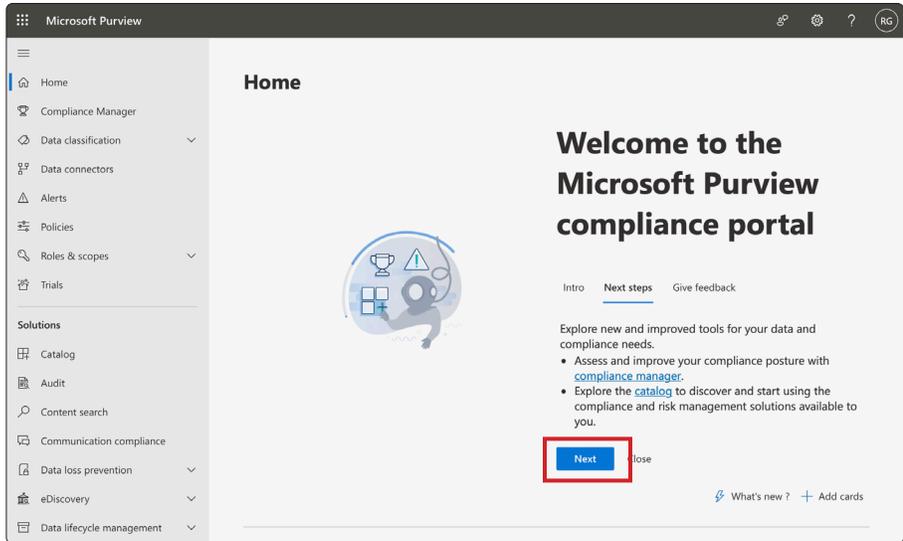


5. In Microsoft Purview compliance portal, click Next. If email archiving has already been set up, you can skip to step 8.

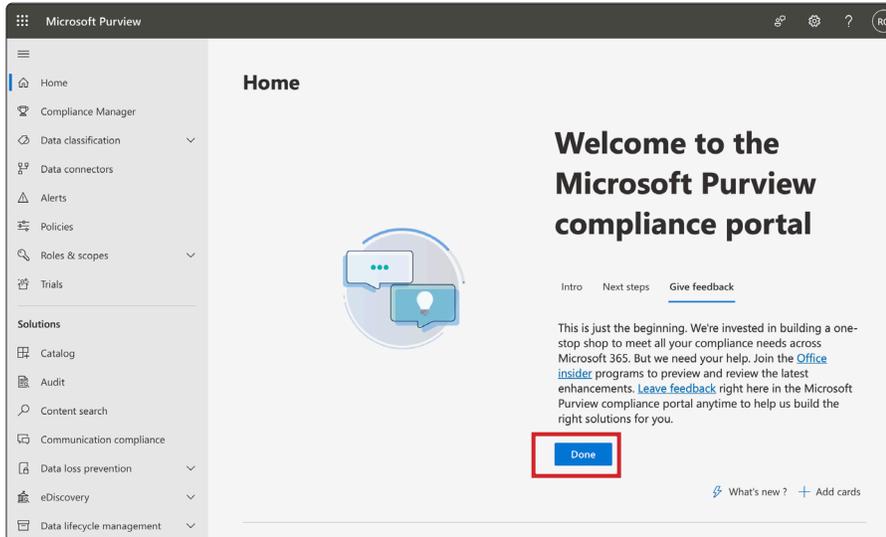




6. Click Next.



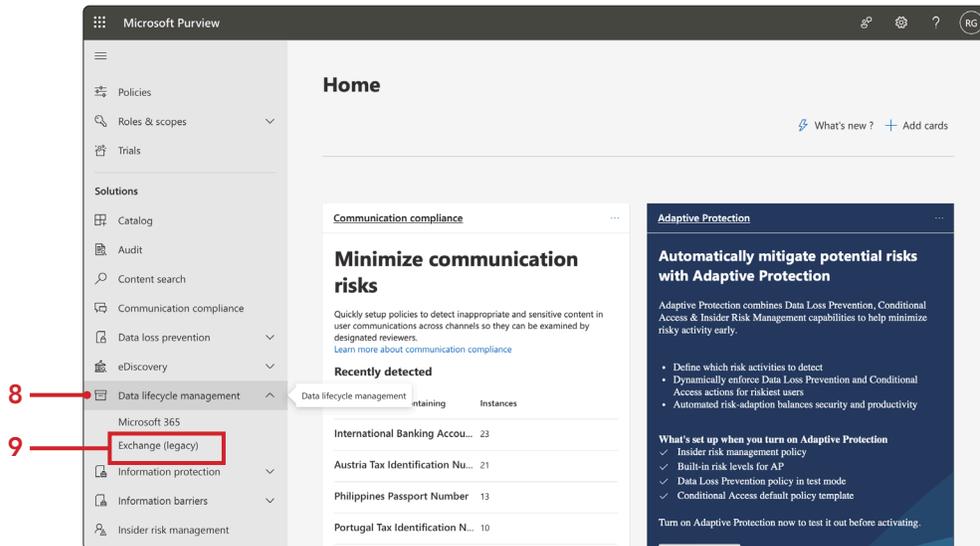
7. Click Done.



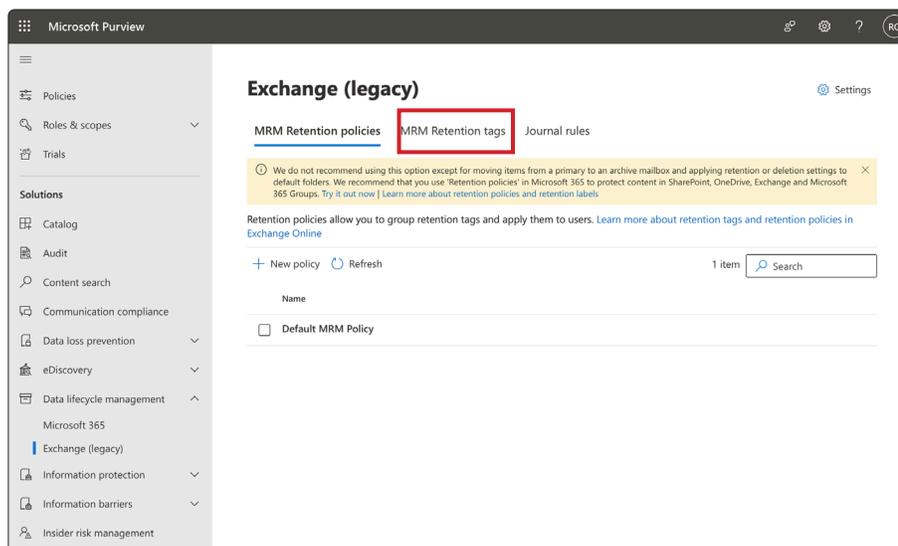


8. Select Data lifecycle management.

9. Click Exchange (legacy)



10. Click MRM Retention Tags (These need to be created before retaining a retention policy.)





11. Click New tag (+).

Exchange (legacy) Settings

MRM Retention policies **MRM Retention tags** Journal rules

ⓘ We do not recommend using this option except for moving items from a primary to an archive mailbox and applying retention or deletion settings to default folders. We recommend that you use 'Labels' in Microsoft 365 to protect content in SharePoint, OneDrive, Exchange and Microsoft 365 Groups. [Try it out now](#) | [Learn more about retention policies and retention labels](#)

Retention tags are visible to end users and can be used to specify when items in users' mailboxes will be moved to the archive or removed from the mailbox. [Learn more about retention tags and retention policies in Exchange Online](#)

+ New tag Refresh 12 items

<input type="checkbox"/>	Name	Type	Retention Period	Retention Action
<input type="checkbox"/>	1 Month Delete	Personal	30 days	Delete
<input type="checkbox"/>	1 Week Delete	Personal	7 days	Delete
<input type="checkbox"/>	1 Year Delete	Personal	365 days	Delete
<input type="checkbox"/>	5 Year Delete	Personal	1825 days	Delete
<input type="checkbox"/>	6 Month Delete	Personal	180 days	Delete
<input type="checkbox"/>	Default 2 year move to archive	Default	730 days	Archive
<input type="checkbox"/>	Deleted Items	Deleted Items	30 days	Delete
<input type="checkbox"/>	Junk Email	Junk Email	30 days	Delete

12. Enter a name for the tag.

13. Enter a description of what the tag does.

14. Click Next.

Exchange (legacy) > Create a retention tag

Tag Name

- Application Method
- Retention settings
- Finish

Name your tag

ⓘ We do not recommend using this option except for moving items from a primary to an archive mailbox and applying retention or deletion settings to default folders. We recommend that you use 'Labels' in Microsoft 365 to protect content in SharePoint, OneDrive, Exchange and Microsoft 365 Groups. [Try it out now](#) | [Learn more about retention policies and retention labels](#)

Retention tag names are displayed to users in Microsoft Outlook and Outlook on the web along with the retention period.

Name *

6 years to move to Archive 12

Description

Moves emails to archive when over 6 years old. | 13

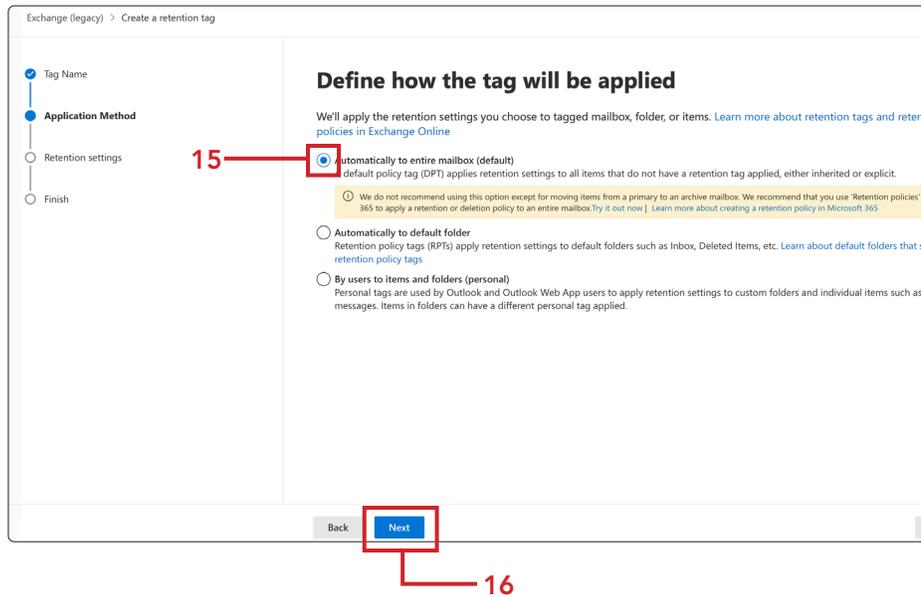
Next Cancel

14



15. Select the radio button for Automatically to entire mailbox. (default).

16. Click Next.

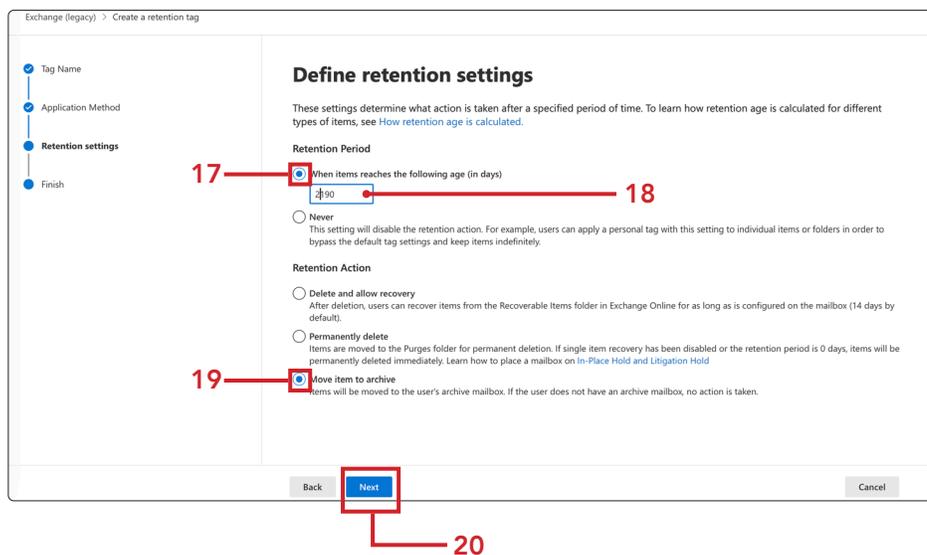


17. Select the radio button for When items reaches the following age (in days).

18. Enter the number of days for retention. I.E 2190. (2190 days would be six years)

19. Select the radio button for Move item to Archive.

20. Click Next. This will start when archiving is turned on.





21. Review your entries for accuracy before creating the tag. Once this tag is created, certain fields including how the tag is applied and certain retention actions, cannot be changed.

22. Click Submit.

A screenshot of the 'Exchange (legacy) > Create a retention tag' interface. The left sidebar shows a progress indicator with four steps: 'Tag Name', 'Application Method', 'Retention settings', and 'Finish'. The 'Finish' step is currently selected. The main content area is titled 'Review tag and finish' and contains the following information:

Review tag and finish

Review your entries for accuracy before creating the tag. Once this tag is created, certain fields (including how the tag is applied and certain retention actions) cannot be changed.

Name
6 years to move to Archive
[Edit](#)

Description
Moves emails to archive when over 6 years old.
[Edit](#)

Application Method
Default
[Edit](#)

Retention settings
2190 days
Move item to archive
[Edit](#)

At the bottom of the form, there are three buttons: 'Back', 'Submit', and 'Cancel'. The 'Submit' button is highlighted with a red rectangular box.

23. Confirm your tag has been created. You can now add this tag to new and existing retention policies.

24. Click Done.

A screenshot of the 'Exchange (legacy) > Create a retention tag' interface showing the completion of the process. The left sidebar shows a progress indicator with four steps: 'Tag Name', 'Application Method', 'Retention settings', and 'Finish'. All four steps are now marked with a green checkmark. The main content area is titled 'Your tag is created' and contains the following information:

Your tag is created

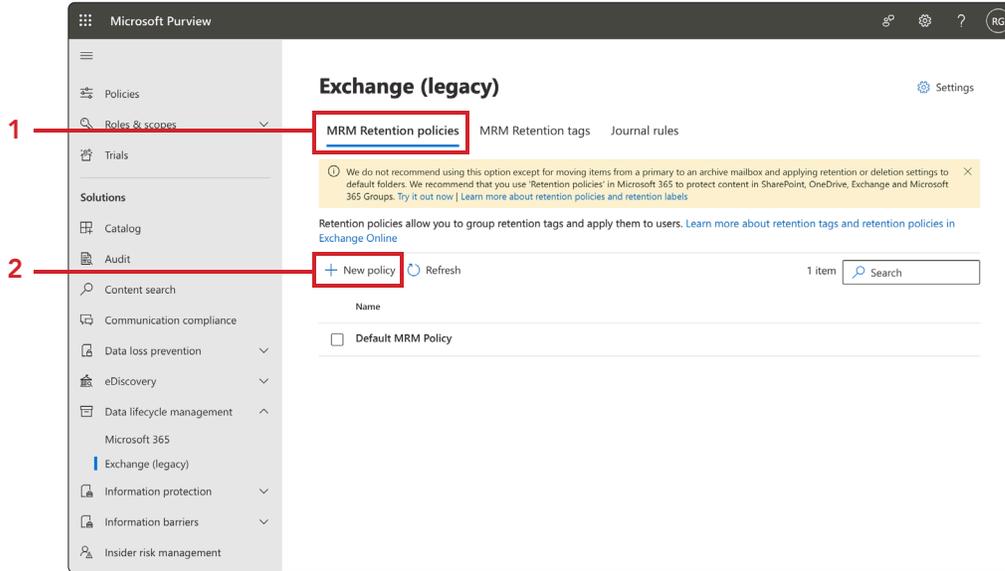
You can now add this tag to new and existing retention policies. [Learn more about retention tags and retention policies in Exchange Online](#)

At the bottom of the form, there is a single button labeled 'Done', which is highlighted with a red rectangular box.

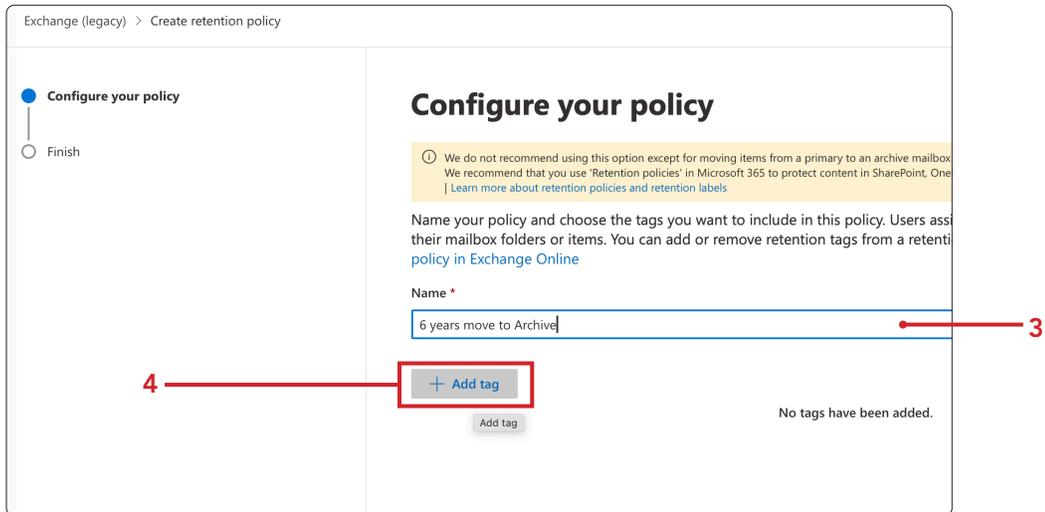


Section 2: Create your MRM Retention Policies

1. Click MRM Retention Policies.
2. Click New policy (+) to create a new MRM Retention policy.



3. Enter a Name for your policy.
4. Click Add tag (+).





5. Select the tags you want to use. You can search for the tag you just created.

6. Click Add.

Choose retention tags

1 selected

<input type="checkbox"/>	Name	Type	Period	Action
<input type="checkbox"/>	1 Month Delete	Personal	30 days	Delete
<input type="checkbox"/>	1 Week Delete	Personal	7 days	Delete
<input type="checkbox"/>	1 Year Delete	Personal	365 days	Delete
<input type="checkbox"/>	5 Year Delete	Personal	1825 days	Delete
<input type="checkbox"/>	6 Month Delete	Personal	180 days	Delete
<input checked="" type="checkbox"/>	6 years to move to Archive	Default	2190 days	Archive
<input type="checkbox"/>	Default 2 year move to archive	Default	730 days	Archive
<input type="checkbox"/>	Deleted Items	Deleted Ite...	30 days	Delete
<input type="checkbox"/>	Junk Email	Junk Email	30 days	Delete
<input type="checkbox"/>	Never Delete	Personal	Unlimited	Delete
<input type="checkbox"/>	Personal 1 year move to archive	Personal	365 days	Archive

7. Click Next.

Configure your policy

ⓘ We do not recommend using this option except for moving items from a primary to an archive mailbox and applying retention or deletion settings to default folders. We recommend that you use 'Retention policies' in Microsoft 365 to protect content in SharePoint, OneDrive, Exchange and Microsoft 365 Groups. [Try it out now](#) | [Learn more about retention policies and retention labels](#)

Name your policy and choose the tags you want to include in this policy. Users assigned to this policy will see these tags applied to their mailbox folders or items. You can add or remove retention tags from a retention policy at any time. [Learn more about retention policy in Exchange Online](#)

Name *

1 items

Name	Type	Retention Period	Retention Action
6 years to move to Archive	Default	2190 days	Archive <input type="button" value="🗑"/>



8. Review policy. Click edit to make changes, if necessary.

9. Click Submit.

This screenshot shows the 'Review policy and finish' step of the 'Create retention policy' wizard in Exchange (legacy). The breadcrumb trail at the top reads 'Exchange (legacy) > Create retention policy'. On the left, a progress indicator shows 'Configure your policy' as a completed step and 'Finish' as the current step. The main content area displays the policy details: 'Name: 6 years move to Archive' with an 'Edit' link, and 'Tags: 6 years to move to Archive - Default - 2190 days - Archive' with an 'Edit' link. At the bottom, there are 'Back' and 'Submit' buttons, with the 'Submit' button highlighted by a red rectangle.

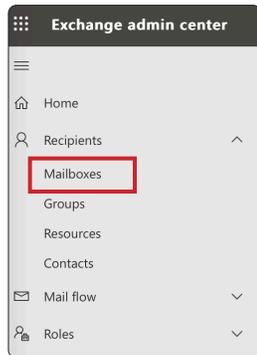
10. Confirm your policy has been created. Click Go to Exchange admin center. You must now apply this policy to mailboxes via Exchange admin center or Exchange Online PowerShell for the retention tags to work.

This screenshot shows the completion screen of the 'Create retention policy' wizard. The breadcrumb trail at the top reads 'Exchange (legacy) > Create retention policy'. The progress indicator on the left shows both 'Configure your policy' and 'Finish' as completed steps. The main content area features a green checkmark icon and the heading 'Your policy is created'. Below this, there is explanatory text: 'Creating the policy is just the first step in managing your mailbox content. You must apply this policy to mailboxes via the Exchange admin center or Exchange Online PowerShell for the retention tags to work. Learn about applying retention policies to mailboxes'. A 'Next steps' section follows, with a blue link: 'To apply this retention policy to mailboxes in Exchange Online, you will need to go to Recipients > Mailboxes in Exchange admin center. From there, you can edit the retention policy assigned to a mailbox via the details panel that appears when you click on a mailbox.' A 'Go to Exchange admin center' button is highlighted with a red rectangle. At the bottom, there is a 'Done' button.



Section 3: Applying your MRM retention policy on users mailbox(es)

1. In Exchange Admin Center, under Recipients, click Mailboxes.

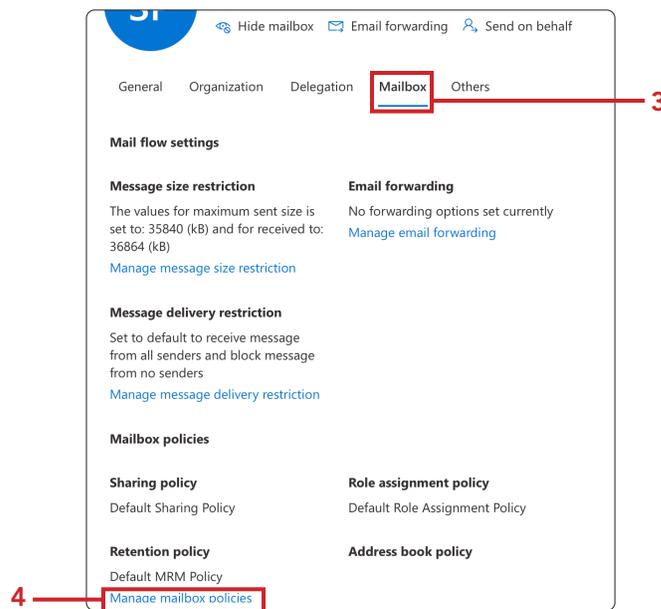


2. Under Manage mailboxes, click on the user name to receive this MRM retention policy.

RTKids Accounting	accounting@	UserMailbox	None	3/16/2024, 6:31 ...
RTKids Calendar	calendar@	UserMailbox	None	3/16/2024, 6:31 ...
RTKids Intern	intern@	UserMailbox	None	3/16/2024, 6:31 ...
Sidney	sidney@	UserMailbox	None	3/16/2024, 6:31 ...
Steven		UserMailbox	None	3/16/2024, 6:31 ...

3. Click Mailbox.

4. Click on Manage mailbox policies, toward the bottom of the window.





5. Under Mailbox policies, select from the drop down menu under Retention policy and select the policy you created. Here we are using 6 years move to Archive.

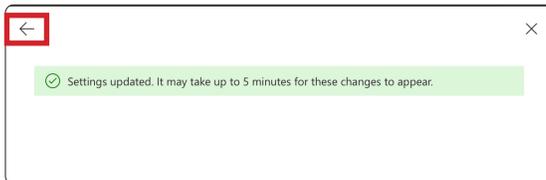
A screenshot of a mobile application interface titled "Mailbox policies". It features three dropdown menus: "Sharing policy" (Default Sharing Policy), "Role assignment policy" (Default Role Assignment Policy), and "Retention policy" (Default MRM Policy). The "Retention policy" dropdown is open, showing options: "[No Policy]", "Default MRM Policy", and "6 years move to Archive". The "6 years move to Archive" option is highlighted with a red rectangular box. A "Save" button is visible at the bottom left of the screen.

6. Click Save.

A screenshot of the same mobile application interface, now showing the "6 years move to Archive" policy selected in the "Retention policy" dropdown. A "Back" button is visible in the top left corner. The "Save" button at the bottom left is highlighted with a red rectangular box.



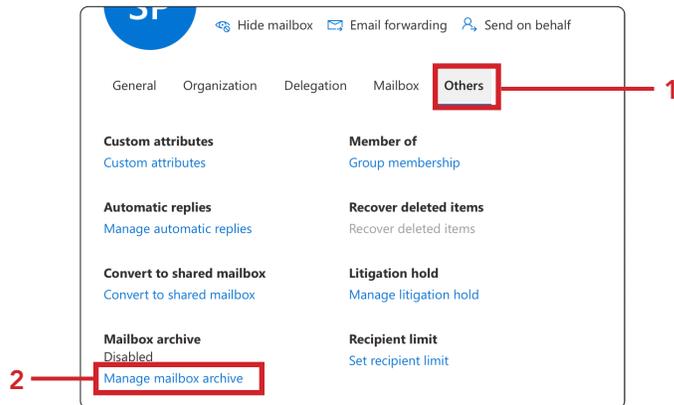
7. Confirm that you see "Updating mailbox policies." It may take up to 5 minutes for these changes to appear.
8. Click Previous (←).



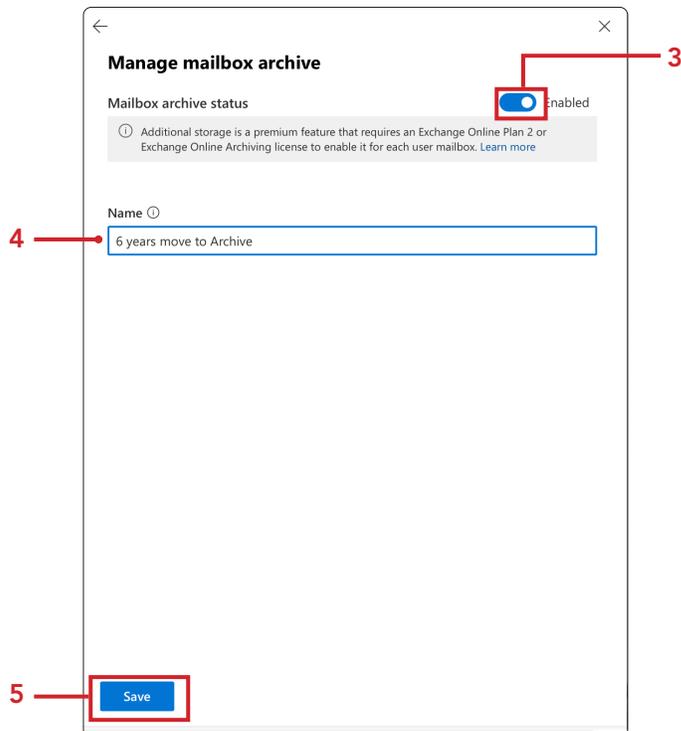


Section 4: Enable Email Archiving

1. For this same mailbox where you applied your MRM retention policy, Click Others.
2. Click Manage mailbox archive.

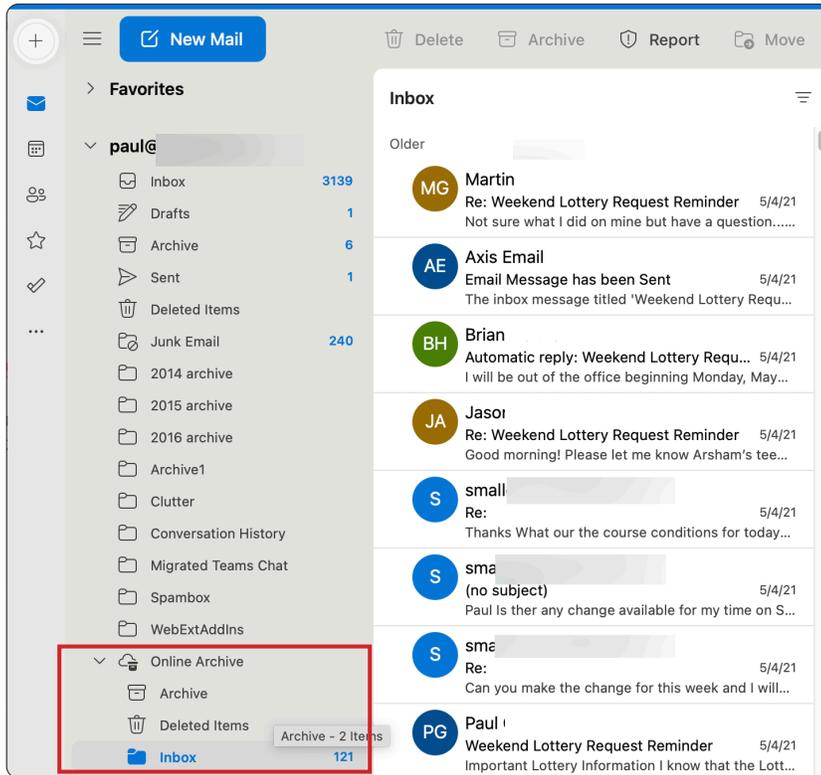


3. Enable Mailbox archive status.
4. Give the policy a name (same as MRM retention policy.)
5. Click Save.





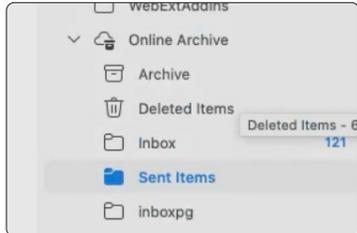
6. Confirm email archiving is setup and enabled. The moving of content may take several days. A folder named Online Archive will be created below your 365 email account. The folders with content archived will be recreated in your Online Archive and the content moved there.





Section 5: View Your Mail Archive

1. Login to Outlook on the web at <https://portal.office.com> > Outlook. Confirm a folder appears below their account folder called Online Archive.
NOTE: If you use Microsoft Outlook on your Mac or PC, the content will appear there as well.



2. Expand Online Archive to view the folders.
3. Click on your Inbox to review what has been archived.

