Microsoft Office 365 online archive – features and FAQs
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Purpose

This document is designed as a guide for users in using the Archive features of Office 365

Document Support Boundaries

This Document is written to support the following mail clients

- Outlook 2010 (Windows)
- Outlook Web Access (OWA)

*Note: For any other versions of Email clients, please consult your manual, built in help system, place of purchase or use online searches for configuration instructions.

Examples used in this document

We have used examples throughout this document for usernames and email addresses

- Where email address is asked for, please enter your ANU email address.
- Where username is asked for please enter it in the format listed below

Uni-id@uds.anu.edu.au (for example u1234567@uds.anu.edu.au)
Office 365 Archive

An Office 365 Archive is like a second mailbox hosted on Exchange online and can provide a centralized storage of email messages, email folders, email message attachments, contacts, calendar items, and so on.

They appear automatically in OWA and Outlook (2010+) like a PST file would previously in your Folder list when they are enabled by the Server Administrators.

These archives are stored on the Exchange server, so you are able to access to them when you move around from computer to computer.

Office 365 Archive Features

1. Online Storage
   o They provide users with a single, unified archive for managing their messaging data
   o Access their archive messages from any computer, by using Outlook Web App.
   o Easily copy or move messages between their primary and archive mailboxes.
   o Search their entire mailbox in Outlook or Outlook Web App. Because the archive mailbox isn't cached locally on the user's computer, search results include items found in the users' archive mailbox.
2. 100 GB of Data Storage

   1a. Users receive a default quota of 100 GB on the archive mailbox, on top of the 25GB mailbox quota.

3. Retention and Archive policies - automatically move items

   1b. Retention and Archive policies can apply to specific messages, conversations, or folders in your Exchange Server account. For example, a message can be tagged with an archive policy so that it is automatically moved to the Personal Archive after a specified amount of time. These policies vary by organization.

Microsoft office 365 online archive – special note

The emails in your online archive are not cached (copied down) to your local computer that you are logged onto. When you access an email in the archive via MS Outlook, be aware that it will be slow as it has to load a temporary copy of that email to your computer.

This will be impacted further if it is an email with a large amount of large attachments in it.

This will not apply if you are using OWA as you log directly into the server.

Retention or Archive Policies

Retention policies and archive policies let you control how long items in your mailbox will be retained. You can apply retention policies and archive policies to individual mail items, as well as to folders in your mailbox.
Default Retention or Archive Policies

<table>
<thead>
<tr>
<th>Name</th>
<th>Retention Action</th>
<th>Retention Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Month Delete</td>
<td>Delete</td>
<td>30 days</td>
</tr>
<tr>
<td>1 Week Delete</td>
<td>Delete</td>
<td>7 days</td>
</tr>
<tr>
<td>1 Year Delete</td>
<td>Delete</td>
<td>1 year</td>
</tr>
<tr>
<td>5 Year Delete</td>
<td>Delete</td>
<td>5 years</td>
</tr>
<tr>
<td>6 Month Delete</td>
<td>Delete</td>
<td>6 months</td>
</tr>
<tr>
<td>Default 2 year move to archive</td>
<td>Default Archive</td>
<td>2 years</td>
</tr>
<tr>
<td>Never Delete</td>
<td>Delete</td>
<td>Unlimited</td>
</tr>
<tr>
<td>Personal 1 year move to archive</td>
<td>Archive</td>
<td>1 year</td>
</tr>
<tr>
<td>Personal 5 year move to archive</td>
<td>Archive</td>
<td>5 years</td>
</tr>
<tr>
<td>Personal never move to archive</td>
<td>Archive</td>
<td>Unlimited</td>
</tr>
</tbody>
</table>

Archive Policy
- 1 year
- 5 years
- Never
- Use Folder Policy

Retention Policy
- 1 Month Delete (30 days)
- 1 Week Delete (1 week)
- 1 Year Delete (1 year)
- 5 Year Delete (5 years)
- 6 Month Delete (6 months)
- Never Delete (Never)
- Use Folder Policy

More Retention Policies...
Set Folder Policy...
View Items Expiring Soon
## Default Retention or Archive Policies defined

<table>
<thead>
<tr>
<th>Name</th>
<th>Retention Action</th>
<th>Retention Period</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Month Delete</td>
<td>Delete</td>
<td>30 Days</td>
<td>After message is received: Hold for 30 days</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>After retention period: Delete (Temporarily Recoverable)</td>
</tr>
<tr>
<td>1 Week Delete</td>
<td>Delete</td>
<td>7 Days</td>
<td>After message is received: Hold for 7 days</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>After retention period: Delete (Temporarily Recoverable)</td>
</tr>
<tr>
<td>1 Year Delete</td>
<td>Delete</td>
<td>1 Year</td>
<td>After message is received: Hold for 1 year</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>After retention period: Delete (Temporarily Recoverable)</td>
</tr>
<tr>
<td>5 Year Delete</td>
<td>Delete</td>
<td>5 Years</td>
<td>After message is received: Hold for 5 years</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>After retention period: Delete (Temporarily Recoverable)</td>
</tr>
<tr>
<td>6 Month Delete</td>
<td>Delete</td>
<td>6 Months</td>
<td>After message is received: Hold for 6 months</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>After retention period: Delete (Temporarily Recoverable)</td>
</tr>
<tr>
<td>Name</td>
<td>Retention Action</td>
<td>Retention Period</td>
<td>Notes</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>------------------</td>
<td>------------------</td>
<td>----------------------------------------------------------------------</td>
</tr>
<tr>
<td>Default 2 year move to archive</td>
<td>Default Archive</td>
<td>2 Years</td>
<td>After message is received: Hold for 2 years</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>After retention period: Move To Archive</td>
</tr>
<tr>
<td>Never Delete</td>
<td>Delete</td>
<td>Unlimited</td>
<td>After message is received: Hold indefinitely</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>After retention period: Do not delete. (Using this policy on a message from being deleted automatically.)</td>
</tr>
<tr>
<td>Personal 1 year move to archive</td>
<td>Archive</td>
<td>1 Year</td>
<td>After message is received: Hold for 1 year</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>After retention period: Move To Archive</td>
</tr>
<tr>
<td>Personal 5 year move to archive</td>
<td>Archive</td>
<td>5 Years</td>
<td>After message is received: Hold for 5 years</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>After retention period: Move To Archive</td>
</tr>
<tr>
<td>Personal never move to archive</td>
<td>Archive</td>
<td>Unlimited</td>
<td>After message is received: Hold indefinitely</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>After retention period: Do not move. (Using this policy on a message will prevent it from being automatically moved to the archive.)</td>
</tr>
</tbody>
</table>
Add or remove an optional retention policy or archive policy

You may be able to add or remove some of the optional retention policies and archive policies that were set up by the person who manages your mailbox. Other policies can't be removed.

When you choose an optional policy, it shows up in the list of policies that can be applied to items and folders.

Apply Retention Policies and Archive Policies to Your Messages

You can apply retention policies and archive policies to your email items using Microsoft Office Outlook Web App and Outlook 2010 or later versions. These policies let you specify how long email items should be kept and what should be done with them when they reach a certain age.

Even if you don't apply policies to your email items, items in your mailbox may be moved or deleted automatically based on default retention policies and default archive policies set up by the person that manages your mailbox.
Applying policies to an individual email or folder in OWA

In Outlook Web App, you can apply either an archive policy or a retention policy, or both, to an email item or folder. To do this, use the right-click menu.


2. To apply a policy to an individual email, right-click the email folder, point to Retention Policy or Archive Policy
   a. Select the policy you want. You can apply both a retention policy and an archive policy to an email item.

   By default, Use Folder Policy is selected for your messages.
How do I apply policies using Outlook 2010?

In Outlook 2010, you can apply both a retention policy and an archive policy to an email item or folder. The steps for applying policies are similar to the steps you use in Outlook Web App. You can use the right-click menu or the Policy button on the toolbar.

Assign an archive policy to an email folder in Outlook 2010

In the Navigation Pane,

1. Right-click a mail folder

2. Select Properties
In the Folder **Properties** window,

3. Select the **Policy** tab.

*Note:* If the **Policy** command is missing, either your Exchange Server administrator hasn’t enabled retention and archive policies for your account, or you aren’t using an Outlook license that is required for the feature.

For more information, see License requirements for Personal Archive and retention policies.
4. In the section called **Online Archive**, in the **Move Items to the Archive when older than** list, select an entry based on your organization’s guidelines.

5. Select **Apply**

6. Select **OK**.
Remove archive policy on an email folder in Outlook 2010

*Note: When you remove an archive policy, the folder policy applies to the item, if one is assigned.

In the Navigation Pane,

1. Right-click a mail folder

2. Select Properties
In the Folder **Properties** window,

3. Select the **Policy** tab.
4. In the section called **Online Archive**, in the **Move Items to the Archive when older than list**, select **Use Parent Folder Policy**.

5. Select **Apply**

6. Select **OK**.
Assign an archive policy to email messages in Outlook 2010

1. Launch Outlook

2. In your mailbox, select an email that you wish to archive (use CTRL to select multiple emails).

   In the Tags Toolbar

3. Select Assign Policy.

   ![Assign Policy Button]

   *Note: If the Policy command is missing, either your Exchange Server administrator hasn’t enabled retention and archive policies for your account, or you aren’t using an Outlook license that is required for the feature. For more information, see License requirements for Personal Archive and retention policies.

4. Under Archive Policy, click an entry based on your organization’s guidelines.

   *Note: If an archive date applies to a message, when the message is opened, the archive date appears near the bottom of the message window after the message body section.
Remove an archive policy from email messages

*Note: When you remove an archive policy from an email message, the folder policy applies to the item, if one is assigned.

1. In the message list, click a message (use CTRL to select multiple emails).

   In the Tags Toolbar menu,

2. Select Assign Policy.

3. Select Use Folder Policy.

   If an archive date applies to a message, when the message is opened, the archive date appears near the bottom of the message window after the message body section.
View the mailbox archive policy

Your Exchange Server administrator can assign an archive policy to all email messages in your Exchange Server mailbox.

Any message in your Exchange mailbox that doesn't have an archive policy assigned inherits the mailbox policy.

To view the mailbox policy via Outlook 2010

1. Select the File tab.

2. Under Account Information, make sure that your Exchange Server account is selected. If you have more than one account configured in your Outlook profile, select the down arrow, and then select the appropriate Exchange account.

3. Under Account Settings, information appears with the web address to use for accessing your Exchange account by using Outlook Web Access (OWA), and when email messages are automatically moved to the Personal Archive.

*Note: If your Exchange administrator hasn't set up OWA or Personal Archive, one or both items don't appear.
Moving Messages to Exchange Online Archiving

Users can drag and drop .pst files into the personal archive, for easy online access. Users can also move e-mail items from the primary archive to the personal archive automatically, using Archive Polices, to reduce the size and improve the performance of the primary mailbox. While this behaviour is different than Exchange Hosted Archive, which will create a secondary copy of each message in the archive, retention requirements can be achieved in either scenario.

Importing Data to the Personal Archive

Users can import data to personal archives in the following four ways:

1. Import data from a .pst file using Outlook’s Import and Export wizard.
2. Drag email messages from .pst files into the archive.
3. Drag email messages from the primary mailbox into the archive.
4. Let archive policies automatically move email messages from the primary mailbox, based on the age of the messages.

Import data from a .pst file using Outlook’s Import and Export wizard:

Follow these steps to restore, or import, your data into Outlook:

1. Select the File tab.
   
   In the Open category,
2. Select **Import**.

In the **Import and Export Wizard**,

3. Select **Import from another program or file**,

4. Select **Next**.
5. Select Outlook Data File (.pst)

In the section called Options, it is recommended that you select Do not import duplicates, unless you want the imported information to replace or duplicate items that are already in Outlook.

6. Select Next.

   a. Type the path and the name of the .pst file that you want to import.
or

b. Select **Browse** to choose the file to import.

c. Select **Open**

7. Select **Next**.

8. Select the **Online Archive Folder** (Example **Archive – john.smith@anu.edu.au**)) to import to.
To import everything in the .pst file, select the top of the hierarchy.

*Note: The top folder (usually Personal Folders, Outlook Data File or your email address) is selected automatically. Include subfolders is selected by default. All folders under the folder selected will be imported.

So if you don’t want to import everything from the .PST file uncheck the option Include Subfolders.

9. Click Finish.