**MRM (Messaging Records Management) Retention Tags**

*Create Custom Mail Retention Tags*

*In this lab module you are accessing the clients for the first time.*

*In this exercise, you will send an email from **Ramiro Armenta** to **Marguerite Ortiz**. You will then log into Microsoft 365 as **Marguerite**, locate the email in her Inbox, and then assign the email a custom retention policy that you create.*

*Perform the following steps*

□

1. You need to sign in to Ramiro's account **Ramir@m365x346724.onmicrosoft.com** account using a password of **Pa55w.rd**.

□

2. Double click on Internet Explorer to a new browser window and type `outlook.office365.com`, the press Enter.

   Select [Ramir@m365x346724.onmicrosoft.com](mailto:Ramir@m365x346724.onmicrosoft.com)

   Press the Next button (the password Pa55w.rd will be enterd for you)

   Click on Signin and click on Yes

   Click on Save

3. If you approach the site for the first time, you will be asked for your language setting and your time zone:

   - From the Time zone dropdown select Eastern time (US and Canada)

   Click **Save**. And close the Welcome window.

□

   .

□

4. You will now access the new message window

☐

5. On the Outlook on the web main screen, click on **New** Message in the upper left part of the screen.

☐

6. The forms for a new email open. Type the following:

- Click the Next button to and select **Marguerite's** email address from the dropdown list
- Click to add a subject: **Archive Test.** Press Enter
- Click in the body of the email to add this message: **Use this email to test archiving.** Press Enter

☐

7. Click **Send** in the lower left part of the screen to send the email.

☐

8. Sign-out as Ramiro Armenta by clicking the **RA** icon in the upper right of Outlook and then click **Sign-out**. Close your browser.

☐

9. Open a new browser window, click in the address bar in your browser and select `outlook.office365.com`.

☐  Click on Use Another Account

10. Type **marguerite@m365x346724.onmicrosoft.com**

    Type the password **Pa55w.rd**. Press enter. Click on Sign in.

☐

11. If you approach the site for the first time, you will be asked for your language setting and your time zone:

- From the Time zone dropdown select your preferred time zone.(Eastern US & Canada)

☐

12. Click **Save**.  Close the Welcome Window.

☐

13. In Marguerite's Inbox, you should see the email message that Ramiro just sent to Marguerite.

**Note:** Back when you created Marguerite's mailbox in the earlier lab, you enabled her mailbox for archiving, and you assigned the retention policy titled **Office Retention Policy** to her mailbox. This policy included the **3 Year Move - Archive after three years** retention tag. While this policy will be applied by the Managed Folder Assistant to all the received messages in Marguerite's mailbox, she has decided to override this policy for the message that she just received from Ramiro. Marguerite has decided to archive it sooner than 3 years. She will do this by creating a custom, personal retention policy and assigning it a retention tag that archives messages after 1 year.
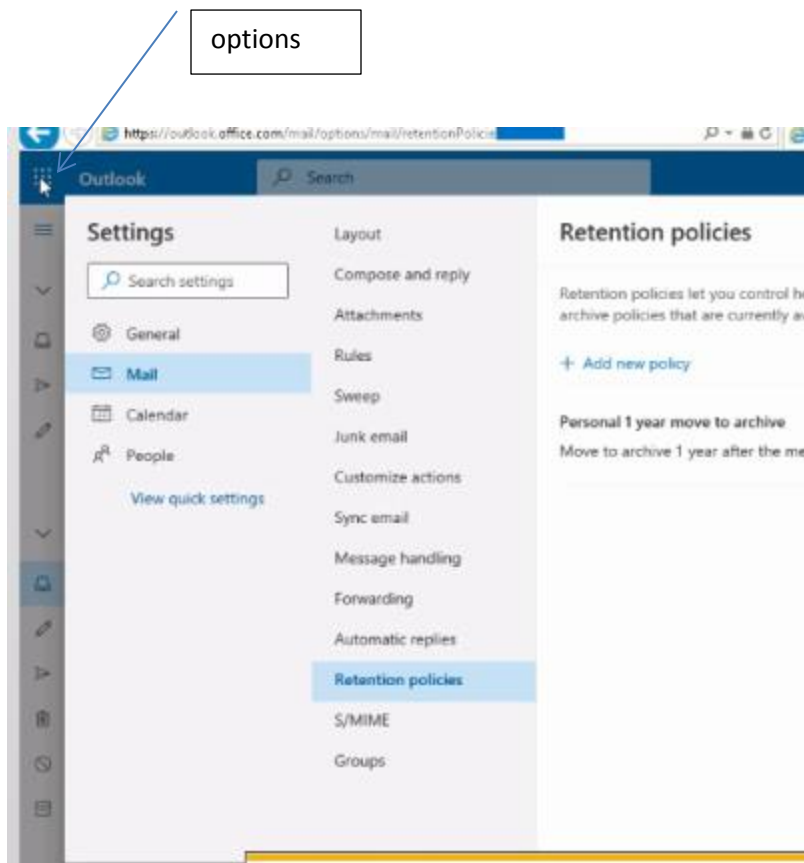
☐

14. Perform the following steps to create a custom retention policy:

- Click on the **Settings** icon in the upper right corner of the toolbar (the gear-shaped icon).
- To the bottom of the screen clickthe  **View All Outlook Settings** link, on the menu to the right  **Mail** will be highlighted.
- Uunder **Mail**, click **Retention policies**.
- Click the **Add New**  policy.
- Select the **Personal 1 year move to archive** retention tag
- Click **Save**.

☐

15. Perform the following steps to assign the custom retention policy to a selected email message:

- In the **Options** pane, click **Options** in the top left corner to return to Marguerite's mailbox.

options

- 
- In the **Inbox**, right click on the message that she received from Ramiro with the subject: **Archive Test**.
- . Hover over Assign Policy (bottom of drop down menu), then select **Personal 1 year move to archive (1year).**
- **Click on MO and sign out**

This personal retention policy will now override the parent folder policy for this specific message, which will be moved to Marguerite's In-Place archive mailbox after 1 year rather than 3 years.