- ❏ [Configure who has permission to manage data retention settings](#) (if you do nothing, everyone who has Manage CRA Setup will also be able to configure data retention)

- ❏ [Set your archiving timeframe](#) (if you do nothing, it will be 60 days after your report expiration date)

- ❏ Find out which clients need data longer than 5 years, if any (if none, stop here!)

- ❏ [Configure your archive access](#)

    - ❏ [Download Cyberduck](#)

    - ❏ Click the "Set up archive access" button in TazWorks

    - ❏ Create a new bookmark in Cyberduck using the Access Key ID and Path provided in TazWorks (and save the Secret Access Key)

    - ❏ Save your bookmark

    - ❏ Open the bookmark by double clicking on it

    - ❏ Enter your Secret Access Key when prompted and save it for future use

- ❏ [Set up encryption](#)

    - ❏ Download either [GPG Tools](#) for Mac or [Gpg4win](#) for PC

    - ❏ Set a passphrase that can be used by everyone in your organization who will need to decrypt files

    - ❏ SAVE THIS PASSPHRASE for future use

    - ❏ Download your private encryption key

    - ❏ SAVE THIS ENCRYPTION KEY for future use

    - ❏ Import the encryption key into the program you chose

    - ❏ Enter the passphrase when prompted

- ❏ [Turn on exporting for the individual clients who need data longer than 5 years](#)

- ❏ [Set the email of the person who should receive the archive download reminder emails if desired](#)