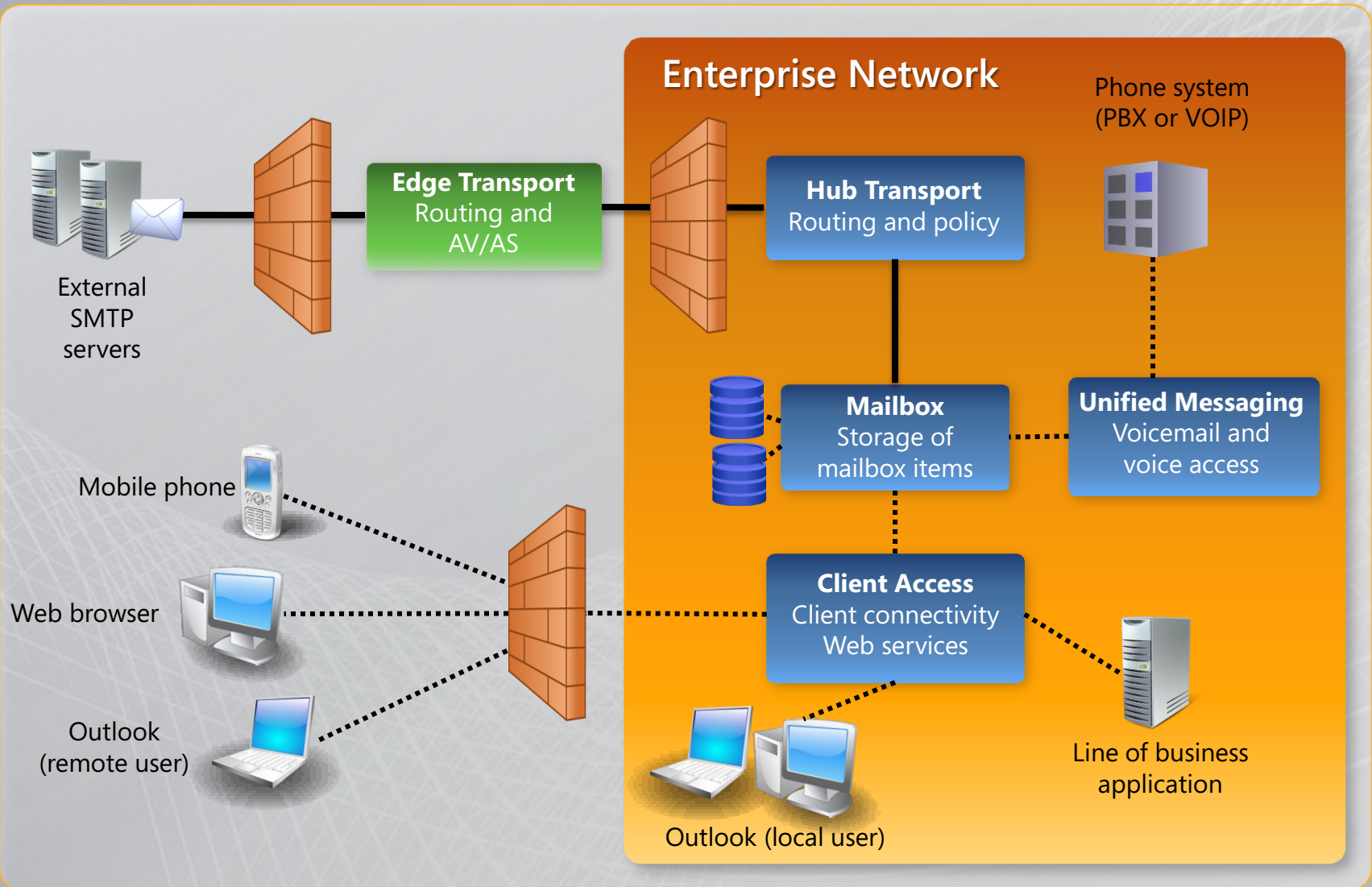


Exchange Server 2010 Personal Archive & Retention Policies

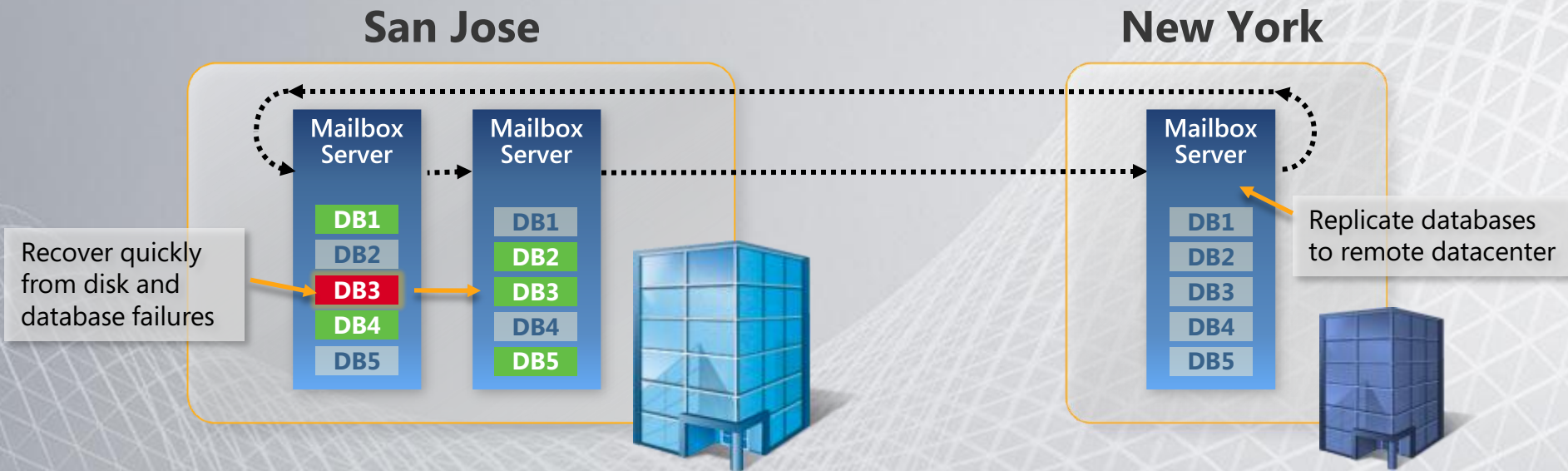
Ned Gnichtel
Technical Specialist - UC
Microsoft Corporation
edwingn@microsoft.com

Exchange Enterprise Topology



Continuous Availability

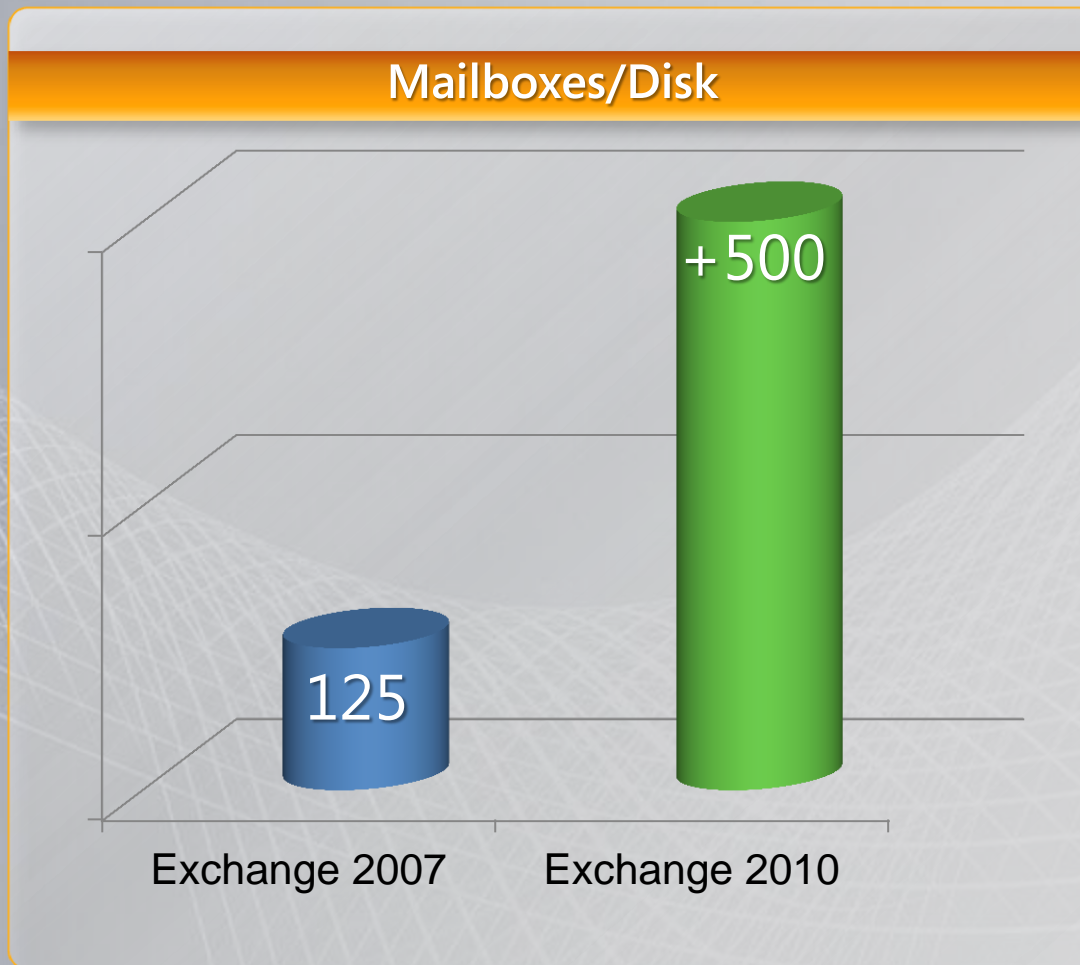
Simplify mailbox resiliency with new unified solution for High Availability, Backup, and Disaster Recovery



- Evolution of Continuous Replication technology
- Provides full redundancy of Exchange roles on as few as two servers
- Reduce backup frequency through up to 16 replicas of each database
- Can be deployed on a range of storage options

Improved Storage Utilization

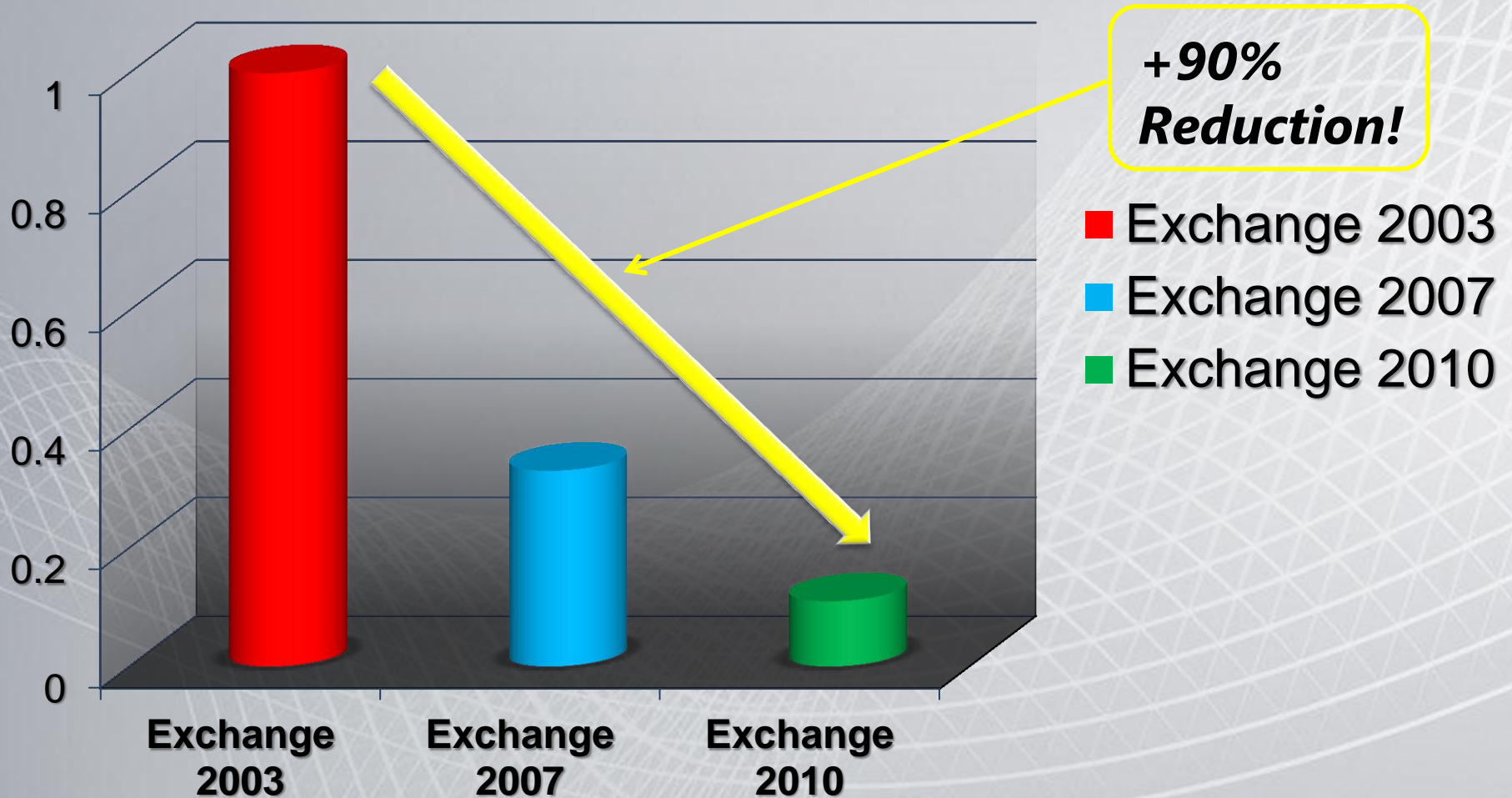
4x increase in number of mailboxes per disk



- Reduced IO enables more mailboxes per disk
- Utilize more disk capacity before performance limits are reached

Exchange IOPS Trend

DB IOPS/Mailbox



Email Archiving

Preserve and discover email data without changing the user or IT pro experience

Preserve

Personal Archive

- Secondary mailbox with separate quota
- Appears in Outlook and OWA
- Managed through EMC or PowerShell

Move and Delete Policies

- Automated and time-based criteria
- Set policies at item or folder level
- Expiry date shown in email message

Hold Policy

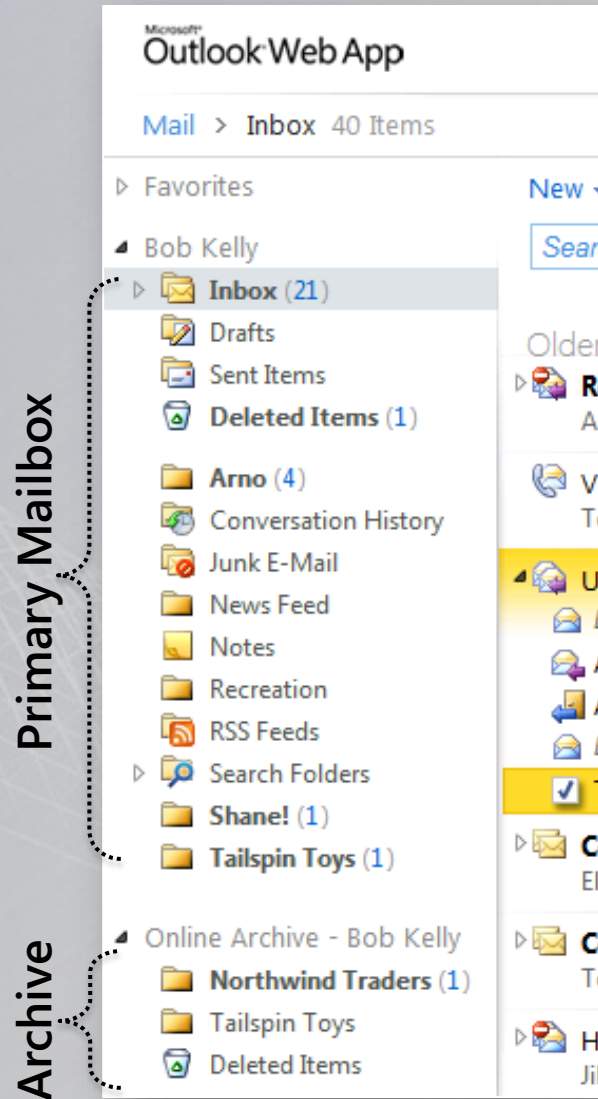
- Capture deleted and edited email messages
- Offers single item restore
- Notify user on hold

Discover

Multi-Mailbox Search

- Web-based UI
- Search primary, archive, and recoverable items
- Delegate through roles-based admin

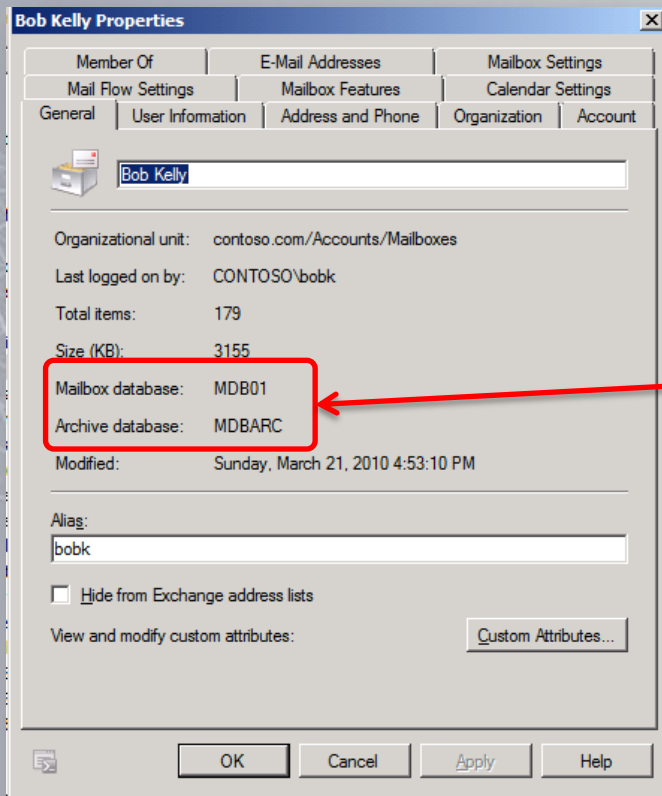
A Familiar Personal Archive



- A specialized Exchange mailbox configured and associated with the user's primary mailbox
- Delivers your users a familiar experience by seamlessly surfacing in both Outlook and Outlook Web App
- Your users can use the same skills and methods they already use today to interact with archive email:
 - "Drag and Drop" email to folders
 - Create folders and categorize
 - Conduct searches and filter results
 - Reply to messages and set flags
- Separate quotas may be set for archive and primary mailboxes

Email Archiving

Users primary and archive mailboxes can be located on the same or separate databases*



The 'Bob Kelly Properties' dialog box is shown with the 'Mailbox Settings' tab selected. It displays information for a mailbox named 'Bob Kelly'. A red box highlights the 'Mailbox database' and 'Archive database' fields, which are 'MDB01' and 'MDBARC' respectively. A red arrow points from this box to the 'New Local Move Request' dialog.

Member Of	E-Mail Addresses	Mailbox Settings
Mail Flow Settings	Mailbox Features	Calendar Settings
General	User Information	Address and Phone
Organization	Account	

Bob Kelly

Organizational unit: contoso.com/Accounts/Mailboxes

Last logged on by: CONTOSO\bobk

Total items: 179

Size (KB): 3155

Mailbox database: MDB01

Archive database: MDBARC

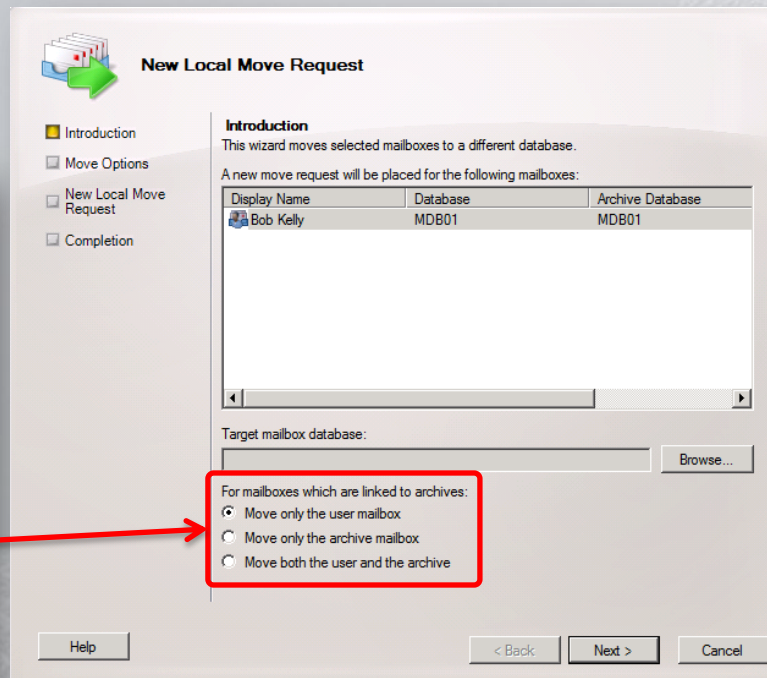
Modified: Sunday, March 21, 2010 4:53:10 PM

Alias: bobk

☐ Hide from Exchange address lists

View and modify custom attributes: [Custom Attributes...](#)

OK Cancel Apply Help



The 'New Local Move Request' dialog box is shown with the 'Introduction' tab selected. It displays a table of mailboxes to be moved. A red box highlights the radio button options for moving mailboxes linked to archives, with a red arrow pointing from the 'Bob Kelly Properties' dialog to it.

New Local Move Request

☒ Introduction
☐ Move Options
☐ New Local Move Request
☐ Completion

Introduction
This wizard moves selected mailboxes to a different database.
A new move request will be placed for the following mailboxes:

Display Name	Database	Archive Database
Bob Kelly	MDB01	MDB01

Target mailbox database: [Browse...](#)

For mailboxes which are linked to archives:

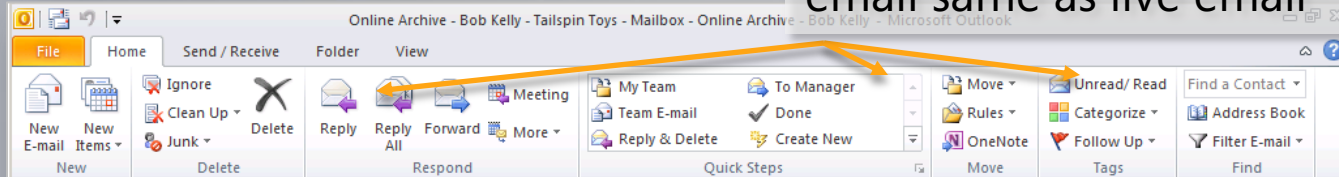
- ☒ Move only the user mailbox
- ☐ Move only the archive mailbox
- ☐ Move both the user and the archive

Help < Back Next > Cancel

- Mailboxes can be moved together or separately
- Allows for different storage hardware, DAGs, RPOs, RTOs, etc.
- Exchange 2010 SP1 supports:
 - Primary and Archive On-Premises (Same DB)
 - Primary and Archive On-Premises (Different DBs)
 - Primary and Archive in the Cloud
 - Primary On-Premises and Archive in the Cloud

A Seamless User Experience

Read, reply, and navigate archived email same as live email



Conversation view scoped to archived email

FW: Review Proposal for Tailspin Toys

Elisabetta Scotti

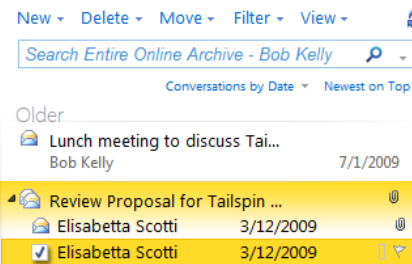
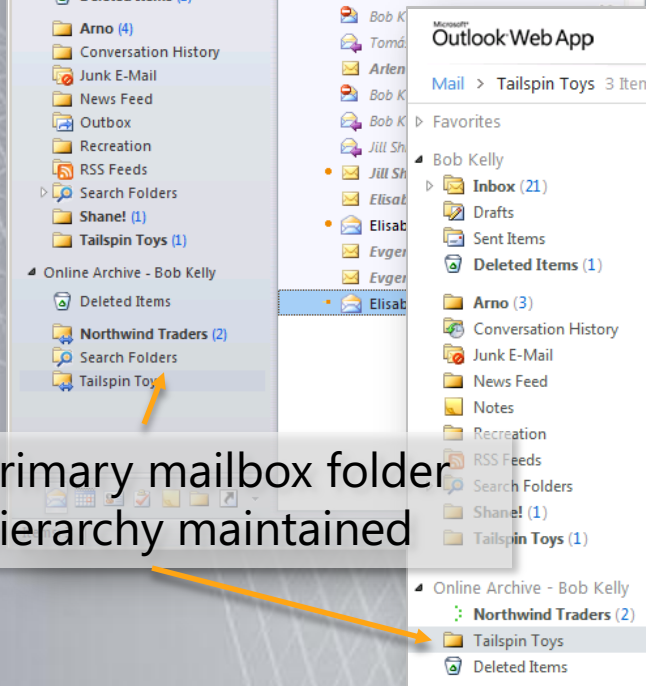
Sent: Thu 3/12/2009 11:57 AM

To: Bob Kelly

Cc: Evgeny Kulikov

Hey Bob... Do you want to come too? I know there were some items you thought we should review more closely.

Primary mailbox folder hierarchy maintained



Todd, do you want to be included in this discussion as well?

Evgeny

Elisabetta Scotti

To: Bob Kelly

Cc: Evgeny Kulikov

Thursday, March 12, 2009 11:58 AM

Hey Bob... Do you want to come too? I know there were some items you thought we should review more closely.

Elisabetta

From: Evgeny Kulikov

Sent: Thursday, March 12, 2009 11:55 AM

To: Elisabetta Scotti

Subject: RE: Review Proposal for Tailspin Toys

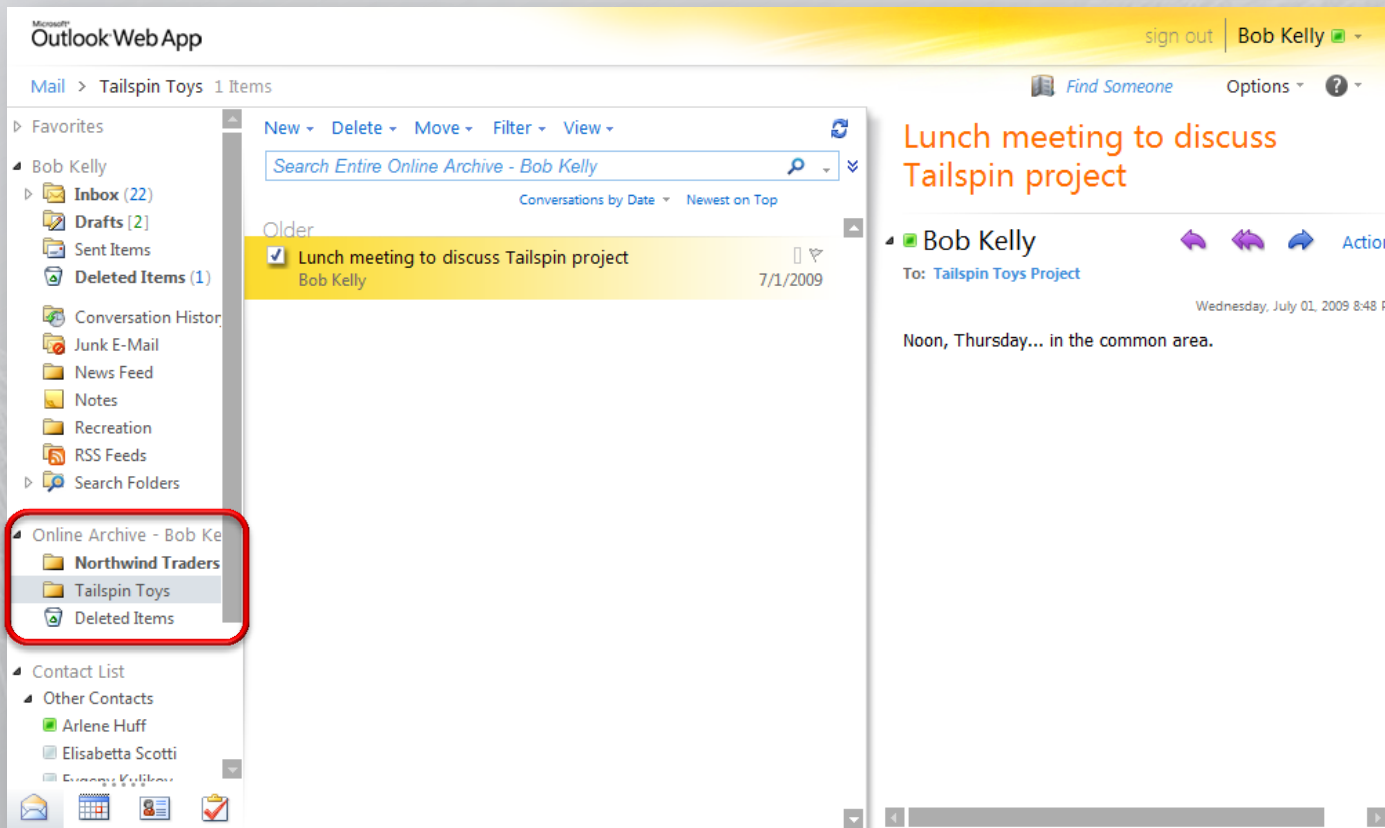
Next Wednesday works for me. Want to do this over lunch?

From: Elisabetta Scotti

Sent: Thursday, March 12, 2009 11:53 AM

Online Archive

- Archive in the folder list
- Treat like any other folder
- Access your PST from the Web



One User Search Experience

The image illustrates a consistent search experience across different Outlook environments. It features three overlapping screenshots:

- Top Screenshot (Outlook Desktop):** Shows the 'Search Tools' ribbon with the 'Search' tab selected. The search bar contains 'tailspin'. A list of results is shown, including 'Lunch meeting to discuss Tailspin project' by Bob Kelly. A text box with the text 'Same search steps with option to search across archived email' has an arrow pointing to the search bar.
- Bottom Left Screenshot (Outlook Web App):** Shows the 'Outlook Web App' interface. The search bar also contains 'tailspin'. A dropdown menu is open, showing options: 'This Folder', 'This Folder and Subfolders', 'Entire Online Archive - Bob Kelly' (highlighted), and 'Set Default Location'. An arrow points from the text box to this dropdown menu.
- Bottom Right Screenshot (Outlook Web App):** Shows the search results for 'Lunch meeting to discuss Tailspin project' by Bob Kelly. The text 'Lunch meeting to discuss Tailspin project' is highlighted in orange.

Arrows connect the search bar in the top screenshot to the search bar in the bottom left screenshot, and from the dropdown menu in the bottom left screenshot to the search results in the bottom right screenshot, demonstrating the flow of the search process.

Email Archiving

Empower compliance officers to conduct multi-mailbox searches with ease

The screenshot displays the Microsoft Exchange Server Mailbox Search interface. It features a sidebar with navigation links: "Select what to search", "Users & Groups", and "Reporting". The main content area is divided into two panes. The left pane, titled "tails핀 search", contains search criteria fields: "Keywords" (with a text area containing "tails핀"), "Include items that can't be searched" (checkbox), "Message types to search: E-mail" (dropdown), "Messages To and From Specific E-Mail Address" (text area), "Date Range" (dropdown), "Mailboxes to Search" (dropdown), and "Search Name and Storage Location" (text area). The right pane, also titled "tails핀 search", contains search options: "Mailboxes to Search" (dropdown), "Select mailboxes to search:" (radio buttons for "Search all mailboxes" and "Search specific mailboxes or the mailboxes of members of public groups"), a list of mailboxes (including "Bob Kelly"), "Search Name and Storage Location" (text area), "Search name:" (text area), "Select a mailbox in which to store the search results:" (dropdown), "Discovery Search Mailbox" (text area), "Send me an e-mail when the search is done" (checkbox), and "Enable full logging" (checkbox). A "Search name" tooltip explains that the search name is used to name the folder where copies of the search results are stored. The bottom of the interface shows "Save" and "Cancel" buttons. On the right side, a user profile for "Arlene Huff" is visible, with a "Sign out" link and a "My Mail" link. Below the user profile, a "Tailspin e-Discovery" status box shows the search is "In progress - 0% complete" with details: User: Arlene Huff, Date: 8/17/2009 8:35 PM, Size: 0 B, Items: 0, Results: discovery@contoso.com [open], and Errors: none. Annotations with orange arrows point from text boxes to specific interface elements: "Delegate Access to Specialists" points to the user profile; "Rich Search Criteria and Targeting Options" points to the search criteria fields; "Results Stored in Specialized Mailbox" points to the "Discovery Search Mailbox" field.

Microsoft Exchange Server

Select what to search

Users & Groups

Reporting

Mailbox Search - Windows Internet Explorer

tails핀 search

*Required fields

Keywords

Type words to search for. Separate words with OR, or NOT. Use double quotation marks to search for phrases. For wildcard searches, place an asterisk before a word.

tails핀

☐ Include items that can't be searched

Message types to search: E-mail

Select message types...

Messages To and From Specific E-Mail Address

Date Range

Mailboxes to Search

Search Name and Storage Location

Mailboxes to Search

*Select mailboxes to search:

☐ Search all mailboxes

☒ Search specific mailboxes or the mailboxes of members of public groups:

+ Add... - Remove

Bob Kelly

Search Name and Storage Location

The search name is applied to the folder in the destination mailbox where search results are stored.

* Search name:

Tailspin e-Discovery

* Select a mailbox in which to store the search results:

Discovery Search Mailbox X Browse...

☐ Send me an e-mail when the search is done

☐ Enable full logging

Save Cancel

Delegate Access to Specialists

Arlene Huff
Sign out

My Mail ?

or edit and restart an existing one, click Refresh below to update

Tailspin e-Discovery

Status: ● In progress - 0% complete

User: Arlene Huff

Date: 8/17/2009 8:35 PM

Size: 0 B

Items: 0

Results: discovery@contoso.com [open]

Errors: none

Rich Search Criteria and Targeting Options

Results Stored in Specialized Mailbox

Streamlined Administration

Use your existing Exchange admin skills and tools to manage and deploy the personal archive

The screenshot displays the Exchange Management Console (EMC) interface. The left-hand navigation pane shows the hierarchy: Microsoft Exchange > Microsoft Exchange On-Premises > Organization Configuration > Mailbox. The main pane shows a list of mailboxes for the 'Entire Forest' (114 objects). The 'Bob Kelly' mailbox is selected, and the 'Enable Archive' option is highlighted in the context menu. An orange arrow points from the 'Enable Archive' option to the 'Archive Quota' dialog box. Another orange arrow points from the 'Archive Quota' dialog box to the 'Archive Settings' section of the 'New Mailbox' dialog box. A third orange arrow points from the 'Archive Settings' section to the 'Add an archive when creating a new mailbox' text box.

Enable the archive on an existing mailbox

Set separate quota for archive mailbox

Archive Quota

Archive Quota

When the archive size exceeds the indicated amount:

☒ Issue warning at (MB): 10000

OK Cancel

New Mailbox

Introduction

User Type

User Information

Mailbox Settings

Archive Settings

☐ New Mailbox

☐ Completion

Archive Settings

Use this step to link an online archive to your mailbox. Items will be moved automatically from the primary user mailbox to the archive based on the default retention policy settings or those you define.

Specify if you want to create an archive for this mailbox and where you want to create it. The location of local archives is optional:

☐ Don't create an archive

☒ Create a local archive

☒ Choose a specific mailbox database rather than selecting one automatically:

MDBARC Browse...

☐ Create a remote hosted archive:

Enter the domain name of your Microsoft Online Business Productivity Suite tenant. For example, type www.contoso.com.

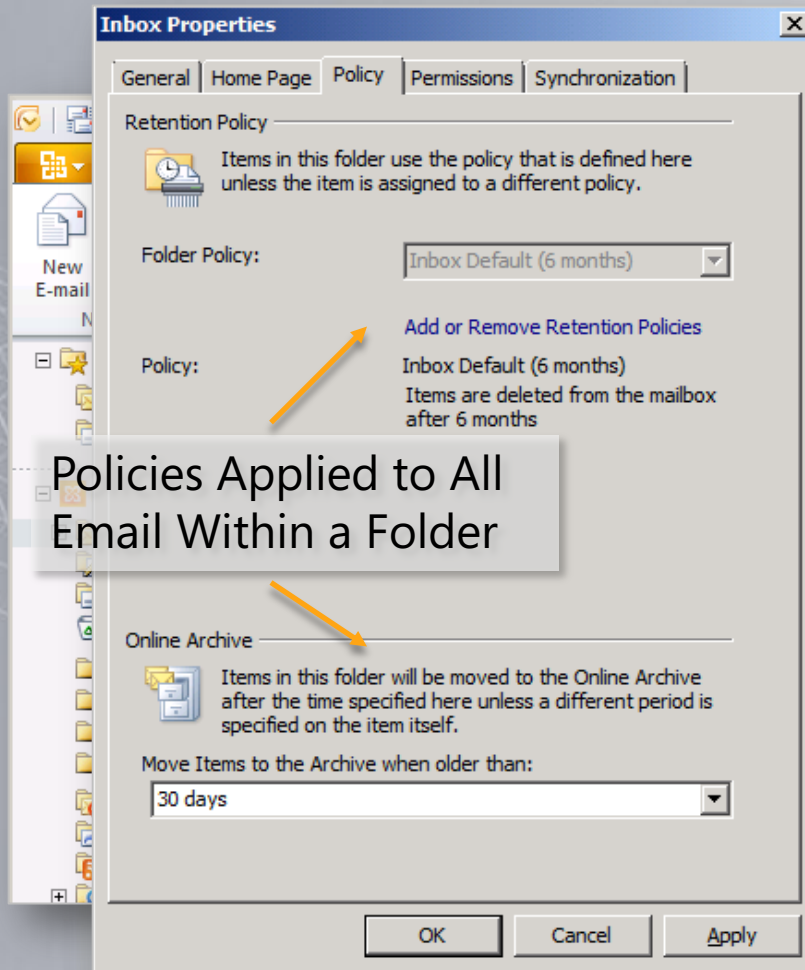
Add an archive when creating a new mailbox

Online archives are a premium feature that requires a Microsoft Exchange Online Access License (CAL) to enable it for the mailbox.

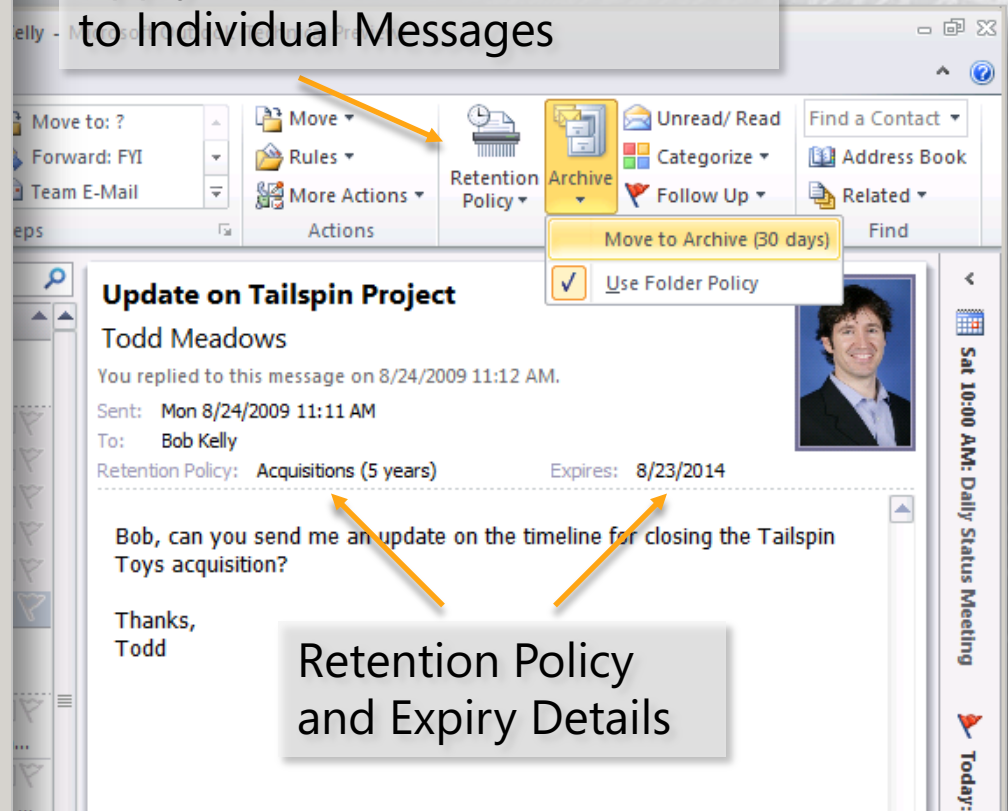
Help < Back Next > Cancel

Retention Policies

Set granular per item retention policies and capture all edits and deletions with legal hold



Apply Move and Delete Policies to Individual Messages



Retention Policies In-Depth

- MRM in Exchange 2010 is accomplished by using *retention tags* and *retention policies*.
 - Assigning retention policy tags (RPTs) to default folders, such as the Inbox.
 - Applying a default policy tag (DPT) to mailboxes to manage the retention of all untagged items.
 - Allowing the user to assign personal tags to custom folders and individual items.
- Tags are assigned to Retention Policies which are assigned to User Mailboxes

Retention Policies In-Depth

- Use retention policies to group one or more retention tags and apply them to mailboxes.
- Retention Policy can contain the following tags:
 - One DPT for Archive action
 - One DPT for Delete action
 - One or more RPTs for supported default folders.
 - Any number of personal tags.

Retention Policies In-Depth

- Key Differentiator versus Managed Folders:
 - MRM functionality is separate from users' Inbox management and filing habits.
 - Users aren't required to file messages in managed folders based on retention requirements.
 - Individual messages can have a different retention tag than the one applied to the folder in which they're located.

Retention Policies In-Depth

1 Create Retention Tags

Retention tags are used to apply retention settings to messages and folders in Exchange 2010. There are three types of retention tags:

Default Policy Tag

A default policy tag (DPT) applies to all items that do not have a retention tag applied, either inherited or explicit. You can only have one DPT in a retention policy.

Retention Policy Tags

Retention policy tags (RPTs) are created for default folders such as Inbox, Deleted Items, etc.

Personal Tags

Personal tags are used by Outlook 2010 and Outlook Web App users to apply retention settings to custom folders and individual items such as e-mail messages.

2 Create Retention Policies

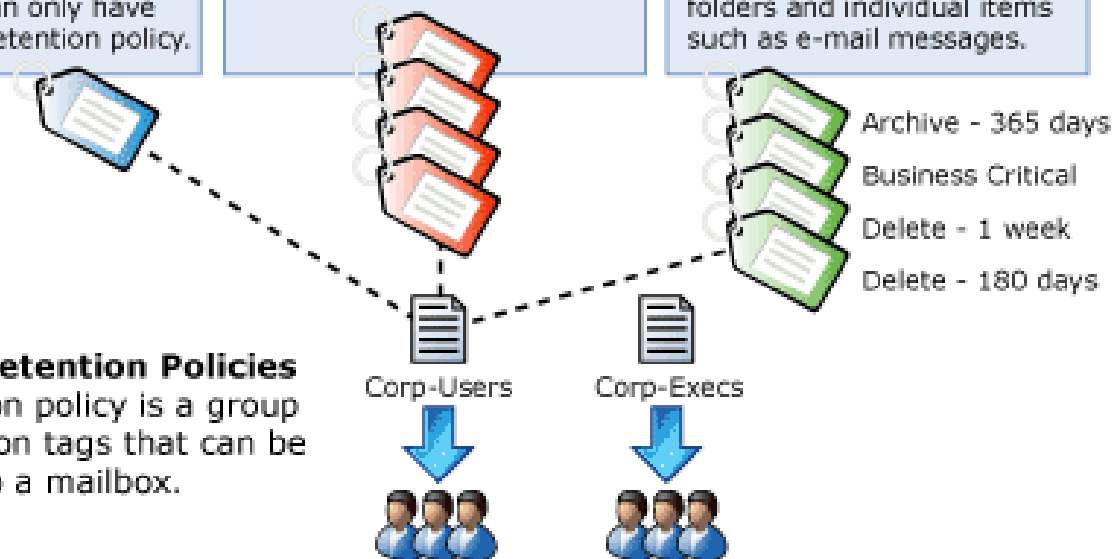
A retention policy is a group of retention tags that can be applied to a mailbox.

3 Link Retention Tags to Retention Policies

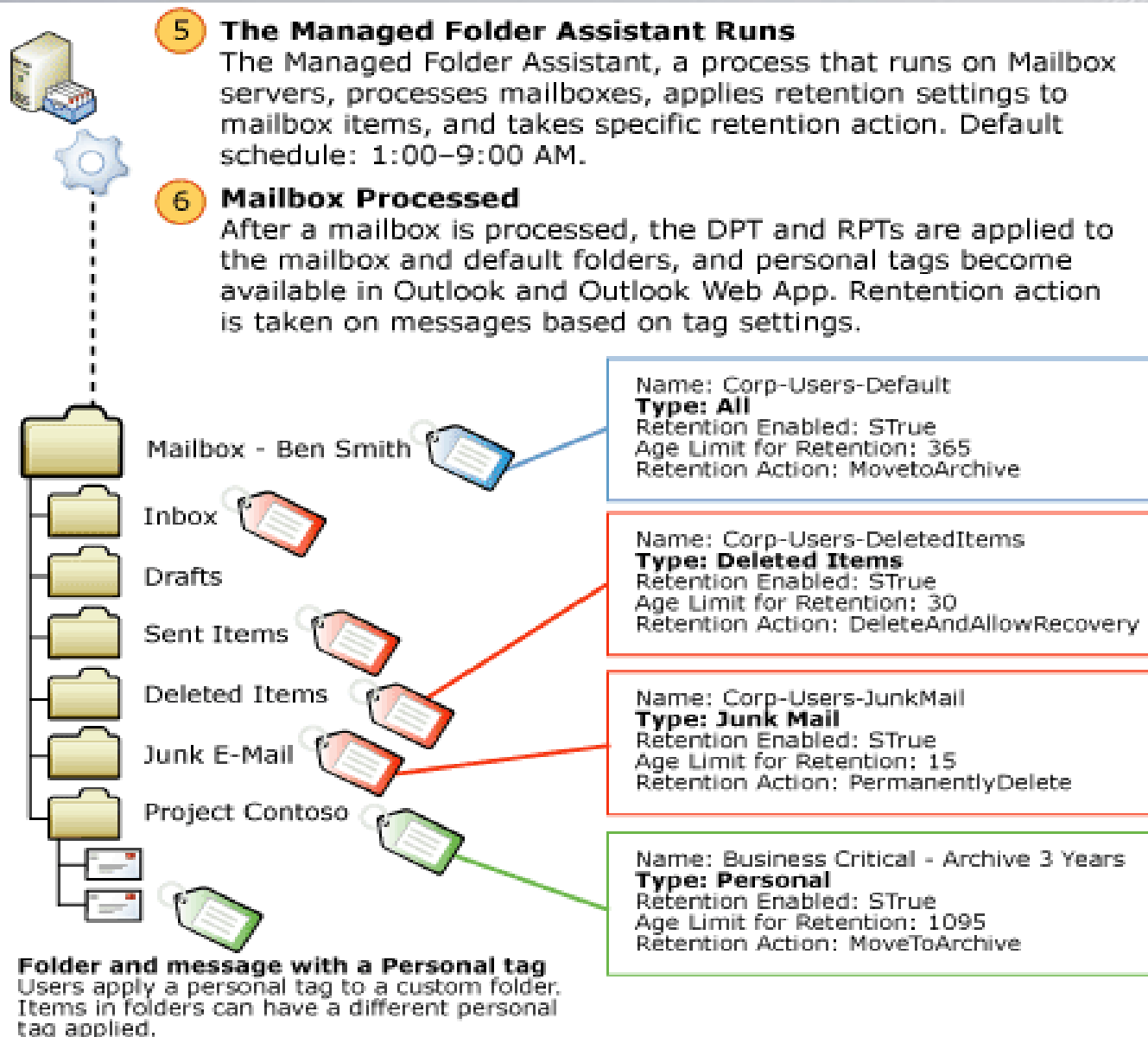
Retention tags are linked to retention policies, so they can be easily applied to mailboxes in your organization. A retention policy can have one DPT, one RPT for each supported default folder, and any number of personal tags.

4 Apply Retention Policies

Retention policies are applied to mailbox users. Different sets of users can have different retention policies.



Retention Policies In-Depth



Types of Retention Tags

- **Default policy tags (DPTs)** DPTs apply retention settings to untagged mailbox items.
- **Retention policy tags (RPTs)** RPTs apply retention settings to default folders such as Inbox, Deleted Items, and Sent Items.
- **Personal tags** Personal tags are available to Outlook 2010 and Outlook Web App users as part of their retention policy.

RPT Usage

- You can create RPTs for the following default folders:
 - Deleted Items, Drafts, Inbox, Junk E-mail, Outbox, Sent Items, RSS Feeds, Sync Issues, Conversation History
- **IMPORTANT:**
 - You can't include more than one RPT for the same default folder type in one retention policy.
 - RPTs aren't supported for the Calendar, Contacts, Journal, Notes, and Tasks default folders.

Retention Actions

- **MoveToArchive** The MoveToArchive action moves a message to the user's archive mailbox.
- **MoveToDeletedItems** The MoveToDeletedItems action moves messages to the Deleted Items folder.
- **DeleteAndAllowRecovery** The DeleteAndAllowRecovery action moves the item to the dumpster
- **PermanentlyDelete** The PermanentlyDelete action permanently deletes a message.
- **MarkAsPastRetentionLimit** The MarkAsPastRetentionLimit action marks a message as past the retention limit.

Example Retention Schema

- Policy 1 has these tags:
 - Move DPT, moves to archive in 3 years.
 - Expiry DPT, deletes items in 7 years.
 - RPT for Deleted Items folder, deletes in 60 days.
 - Personal Tag1: Move to archive in 30 days.
 - Personal Tag2: Delete in 60 days.

Example Retention Schema

- Result:
 - All items in mailbox moved to archive in 3 years.
 - All items in mailbox + archive deleted after 7 years.
 - Items in Deleted items deleted in 60 days (don't get moved to archive).
 - User applies PT1 to item1, moves to archive in 30 days, deleted in 7 years.
 - User applies PT2 to item2, deleted in 60 days, doesn't move to archive.

Creating Policies

- Step 1: Create tags – example, DPT
 - New-RetentionPolicyTag "Delete-15-Default" -
Type All -IsPrimary \$true -Comment "Items
without a retention tag are Deleted after 15
years" -RetentionEnabled \$true -
AgeLimitForRetention 5475 -RetentionAction
PermanentlyDelete
 - **Note:** Every Policy must have a Primary DPT. For
other DPT's, create the tag without the
"IsPrimary" attribute

Creating Policies

- Step 2: Create Policy and Assign Tags:
 - New-RetentionPolicy "Basic Users" - RetentionPolicyTagLinks "Move-Default","Delete-15-Default"
- Step 3: Assign Policy:
 - Set-Mailbox "Ned" -RetentionPolicy "Basic Users"
- This Policy will now move mail to the Archive in 1 year and Permanently Delete in 15

SP1 Enhancements

- Today: All management of Retention Policies is performed through the Exchange Management Shell (PowerShell)
- SP1 will introduce EMC Retention Tag, Policy and Assignment management
- Self Service Assignment of Optional Retention Policy via the ECP

The screenshot displays the Exchange Management Console (EMC) interface. The main window shows the 'Mailbox' section with tabs for Database Management, Database Availability Groups, Sharing Policies, Address Lists, Retention Policy Tags, Retention Policies, and Offline Address Book. The 'Retention Policy Tags' tab is active, showing a table of existing tags.

Name	Type	Action	Age Limit
Scenario1-DeletedItems14Days	Deleted Items	Delete and Allow Recovery	14
Scenario1-DeletedItems21Days	Personal Folder	Delete and Allow Recovery	21
Scenario1-DeletedItems7Days	Personal Folder	Delete and Allow Recovery	7

Two dialog boxes are open over the main window:

- New Retention Policy**: This dialog box is for creating a new retention policy. It includes an 'Introduction' section, a 'Name' field (containing 'Scenario1-DeletedItems'), and an 'Add tags to the retention policy' section with an 'Add...' button. Below this is a 'Select Retention Policy Tag' dialog box showing a list of existing tags for selection.
- New Retention Policy Tag**: This dialog box is for creating a new retention policy tag. It includes an 'Introduction' section, a 'Tag Name' field (containing 'Scenario1-DeletedItems14Days'), a 'Tag Type' dropdown (set to 'Deleted Items'), an 'Age limit for retention (days)' field, an 'Action to take at the end of expiration limit' dropdown (set to 'Delete and Allow Recovery'), and a 'Comments' section.

