



Office 365 for SMB Jump Start

Mod 9: Exchange Online Archiving

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Microsoft

Jump Start Schedule – Target Agenda

Day 1 Administering Office 365	Day 2 Deploying Office 365 (1)
Office 365 Overview & Infrastructure	Exchange Online Deployment & Migration
Office 365 User Management	Exchange Online FOPE
Office 365 DirSync, Single Sign-On & ADFS	Exchange Online Archiving & Compliance
MEAL BREAK	
Administering Lync Online	
Administering SharePoint Online	
Exchange Online Overview & User Management	



Mod 9: Exchange Online Archiving

Overview of Compliance in Exchange Online

Personal Archive

Retention & Hold Policies

Discovery

Microsoft

Why Archive Email?



Storage Management

- Balance mailbox size demands with available storage resources
- Reduce the proliferation of .PST files stored outside of IT control
- Improve overall application and network performance



Data Retention

- Meet industry and regulatory email data retention requirements
- Support ongoing compliance, litigation, or personnel matters
- Preserve valuable intellectual property and corporate assets



Discovery

- Respond to strict timelines for legal discovery orders
- Reduce costs involved in searching for and retrieving email data
- Report on email communications as part of auditing procedures

Challenges to Archiving Email

Email has the potential to exist in so many places



.PST Files



SharePoint



Your Email Server



Web Mail



Backups

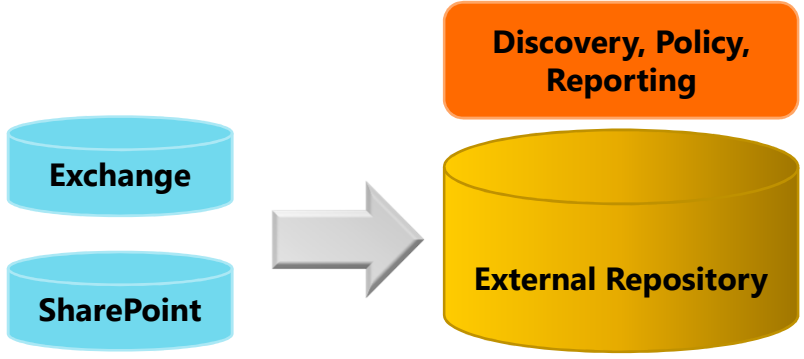


Third-party Archives

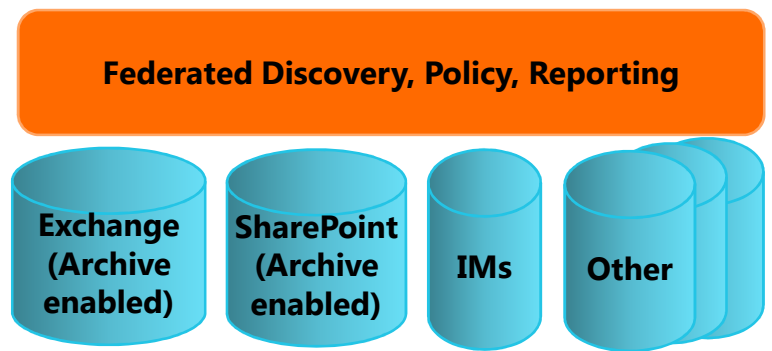
Will you be ready if you receive a discovery request?

In-Place Archiving Roadmap

World Today



Archive-enabled Applications



- Give customers a choice by making the application archive enabled
- Application provides APIs for federation
- Federation built by Microsoft and partners

Exchange Online Archiving & Compliance

- Integrated email archiving capabilities offer tools to preserve and discover email data
 - Without changing the user or IT professional experience from on-premises to the cloud

Preserve

Personal Archive

- Secondary mailbox with separate quota
- Archive in the cloud
- Appears in Microsoft Outlook® and OWA
- Managed through EMC, ECP or PowerShell
- Support for Outlook 2007

Move/Delete Policy

- Automated and time-based criteria
- Works across premise and cloud
- Manage with EMC/ECP
- Expiry date shown in email message

Hold Policy

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

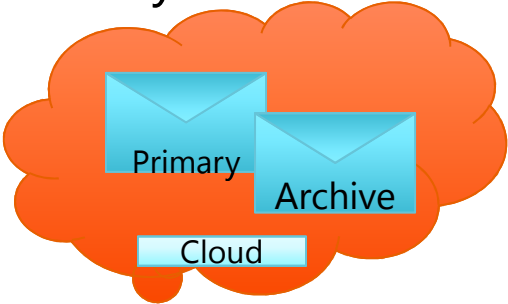
Discover

Multi-Mailbox Search

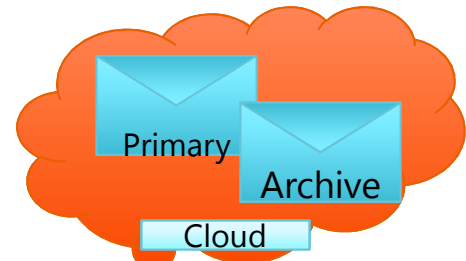
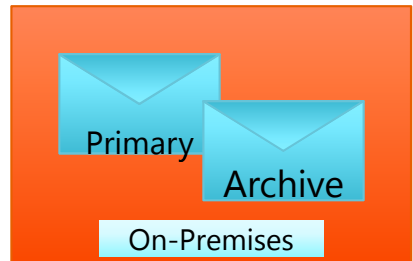
- Central Web-based UI across premise & cloud
- Previews, de-dupe, annotations
- Search primary, archive, dumpster
- Delegate through roles-based admin

Preserve: Archive and the Cloud

Fully Hosted



Cross-premises Coexistence*



Archive in the Cloud*



* Requires Exchange Server 2010 SP1 on-premises



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Preserve: Archive Experience

- **End User Experience**

- Personal archive provides a PST-like experience
- Accessible on Outlook and OWA
- No Outlook restart – auto discovers archive
- Mail automatically moved to the archive through admin policy

- **IT Pro Experience**

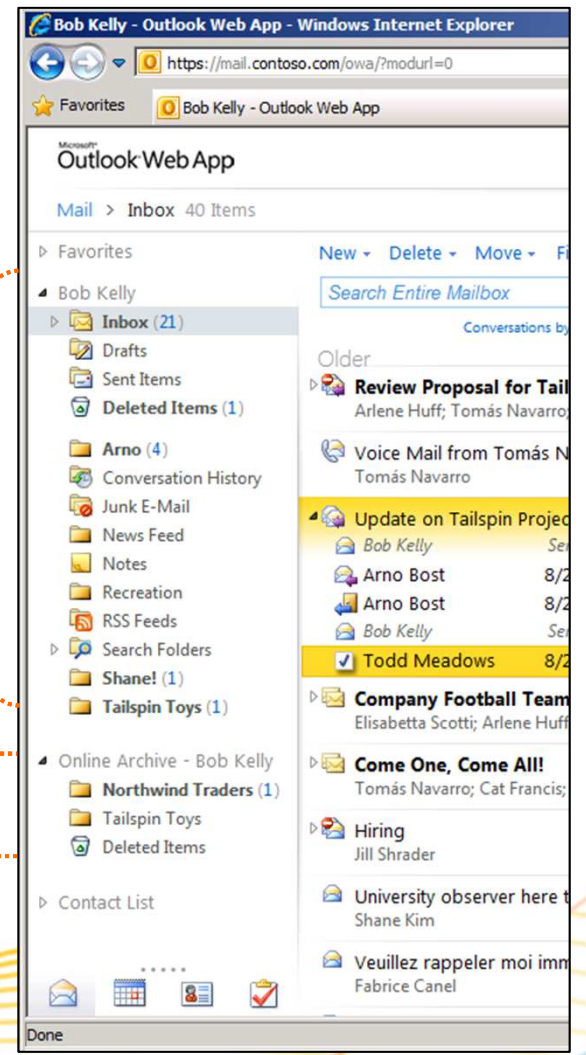
- Same mailbox management experience across the primary and the archive
- Archive must have a primary mailbox
- Similar management experience across On-Premises and Cloud

Familiar Personal Archive

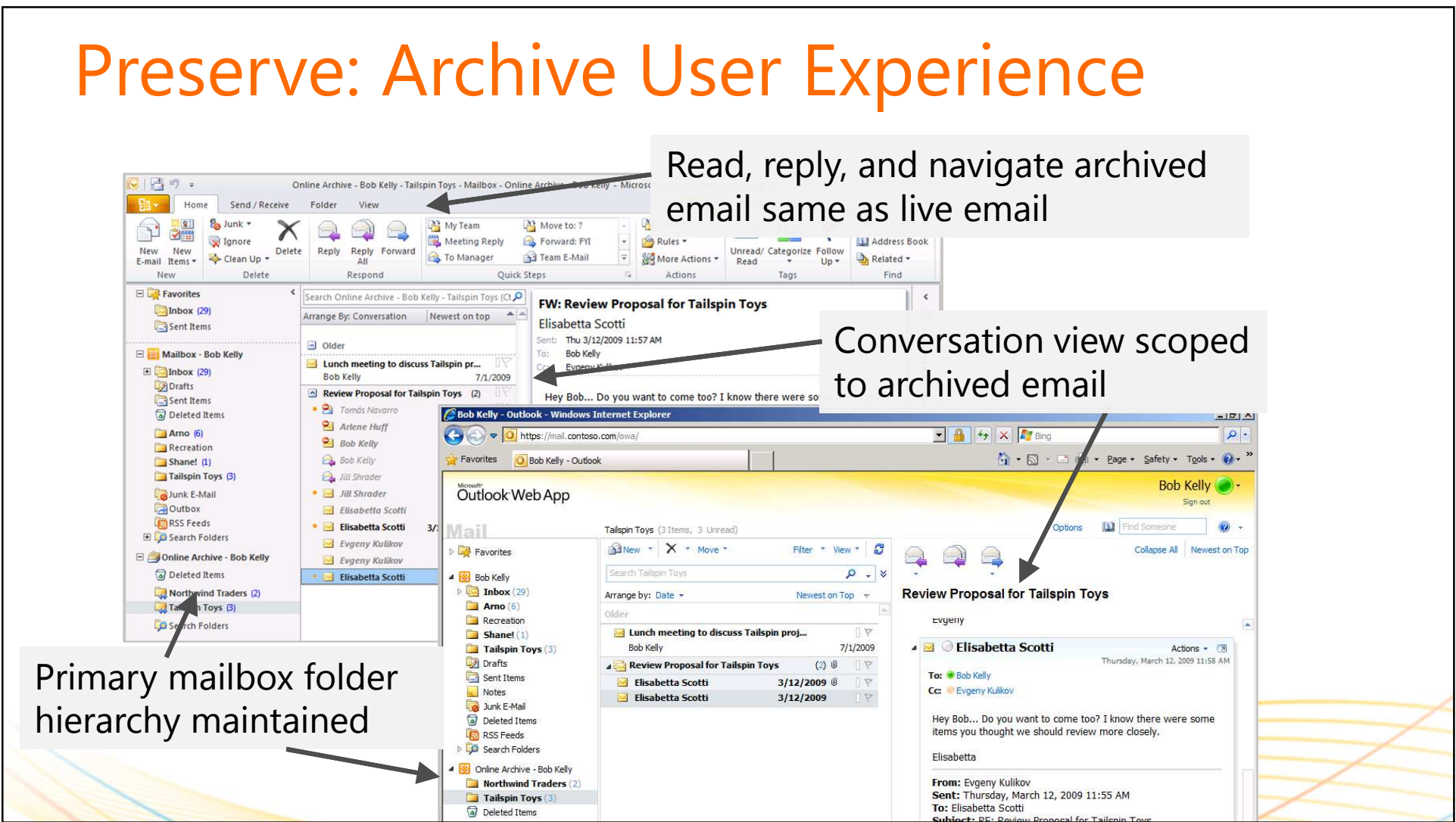
- **Specialized Exchange mailbox** configured and associated with the user's primary mailbox
- **Delivers users familiar experience** by seamlessly surfacing in both Outlook and Outlook Web App
- **Use same skills/methods** already used to interact with archive email
 - “Drag-and-drop” email to folders
 - Create folders and categorize
 - Conduct searches and filter results
 - Reply to messages and set flags

Primary Mailbox

Archive



Preserve: Archive User Experience



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

Conversation view scoped to archived email

Primary mailbox folder hierarchy maintained

Preserve: Archive User Experience | Search

The screenshot displays the Outlook interface with a search window open. A callout box points to the 'Search Tools' ribbon, highlighting the 'Advanced Find' option. Another callout box points to the 'Advanced Find' dialog box, which shows a list of search criteria including 'All Mail fields' and 'All Archived fields'. The main window shows an email titled 'RE: Critical Acquisition Update' from Bob Kelly to Tomás Navarro.

Option to search archive only or both live and archived mail

Advanced search options work across live and archived mail

Archive Client Access

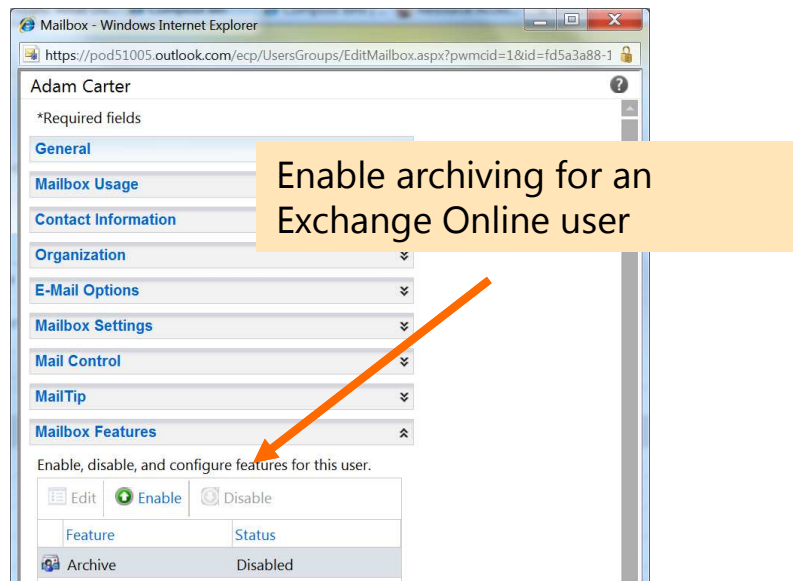
- **Exchange Online archive is only accessible online**
 - Via Outlook and/or OWA
- **No additional client access configuration required**
- **Always point clients to primary mailbox CAS location**
- **Archive access will require a patch for Outlook 2007**

Cloud Archive Choice | Per User Feature

- **Primary + Archive in the cloud**
 - Setup tenant
 - Provision archives
- **Standalone Archive**
 - Setup tenant
 - Setup Rich Co-Existence between on-prem and tenant
 - Provision archives

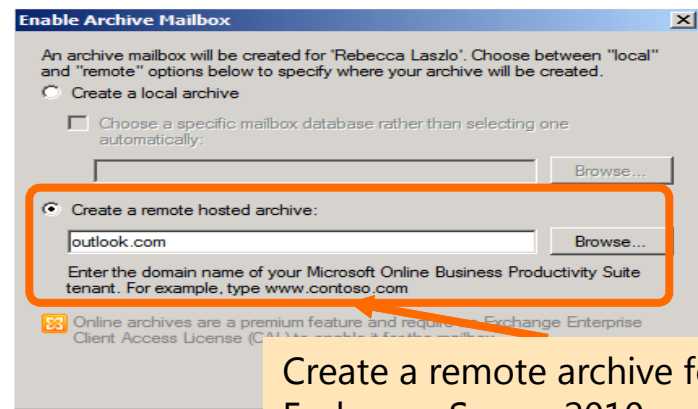
Available to Cloud & On-premise Users

For cloud-based mailboxes



- Easily add archiving capabilities for cloud-based users
- Manage the archive from the Exchange Control Panel

For on-premises mailboxes



- Create cloud archives for local users
- Requires Exchange Server 2010 SP1 on-premises
- Manage archive using EMC
- If primary mailbox moved to cloud, archive moves with it



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Preserve: Retention Management

Set policies allowing you to define, deploy, and automate the expiry and archiving of email

Archive Policy

- Automatically move content to personal archive
- Time-based criteria (such as email older than 2 years)
- Preserves primary mailbox folder hierarchy

Retention Policy

- Automatically delete content
- Time-based criteria (such as email older than 2 years)
- Retention policies travel with archived messages

Combined Policies

- Automatically move message to archive after 'x' months, then delete from archive after 'y' months
- More specific policies override generic defaults

Preserve: Move and Delete Concepts

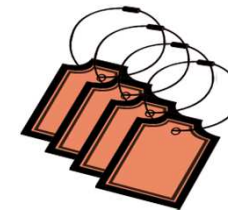
- **Retention Tags**

- Name, Action, Time period
- Admin mandated or User applied
 - All Items in Inbox are deleted in 3 years
 - Items and Folders may have a 2 year Archive Policy



- **Retention Policies**

- Retention tags
- Policies span to groups of users like 'Accounting'
- User has one policy and many tags applied



Preserve: Message Retention

Archive(Move) Policy: *Automatically moves mail to the archive*

- End User Impact: Keeps Mailbox under quota
- Like Outlook Auto-Archive – without PSTs!

Delete Policy: *Automatically deletes mail*

- End User Impact: Unwanted mail is removed from view
- End User Impact: Keeps Mailbox under quota
- Delete Policies apply whether in primary or archive
- Per item policies take precedence over folder policies
- Policy properties are preserved so message retention is respected in third party systems

Preserve: Optional Retention Tags

Additional policies for special projects/roles (e.g., HR)

Retention Policies

Retention Policies let you control how long items in your mailbox will be saved. [Learn more...](#)

The list below shows Retention Policies that are required by your organization and those that you have optionally selected. To add more optional Policies, click Add.

Name	Retention Period	Type
1 month	30 days	Required
1 week	7 days	Required
1 year	1 year	Required
10 Years	10 years	Required
2 days	2 days	Required
2 weeks	14 days	Required
2 years	2 years	Required
3 months	90 days	Required
3 years	3 years	Required
5 Years	5 years	Required
6 months	6 months	Required
Move in 1 Year	1 year	Required
Move in 2 Years	2 years	Required
Move in 5 Years	5 years	Required

1 selected of 16 total

1 month
Expiration: 30 days after being sent or received. Tag items that need to be kept longer for business or legal reasons with a personal tag.
Duration: 30 days
Applies To: All Mailbox Content

Delete Policy

Archive Policy

IT provisioned policies

Preserve: Policies in Outlook 2010 & OWA

The image shows two screenshots from Outlook 2010. The left screenshot displays the 'Archive Properties' dialog box with annotations. The right screenshot shows an email with a retention policy applied, also with annotations.

Annotations for the 'Archive Properties' dialog:

- Policies can be applied to an entire folder:** Points to the 'Folder Policy' dropdown menu.
- Delete policies:** Points to the 'Add or Remove Retention Policies' link.
- Archive policies:** Points to the 'Archive Policy' section.

Annotations for the email screenshot:

- Policies can be applied directly within an email:** Points to the 'Retention Policy' button in the email's ribbon.
- Expiration date stamped directly on email:** Points to the 'Expires: 2/2/2014' text at the bottom of the email.

Message Retention vs. Managed Folders

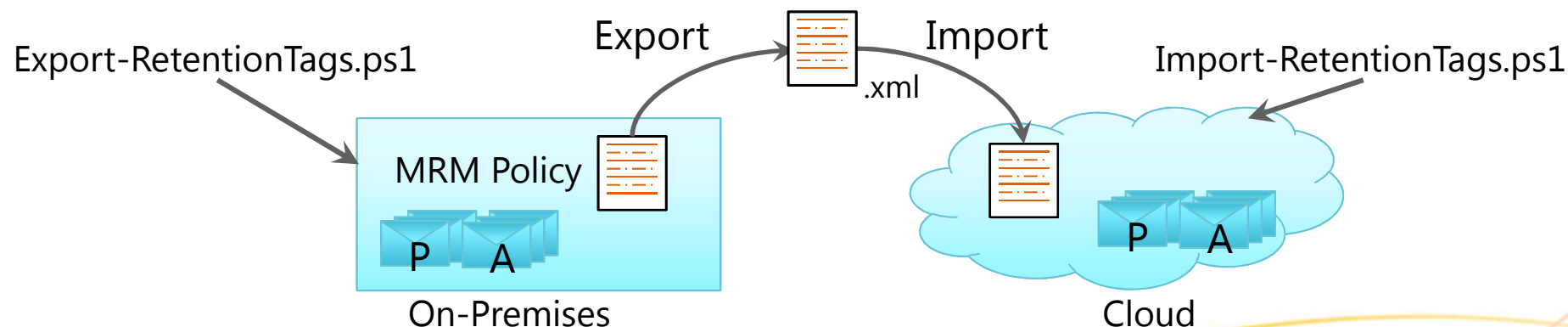
- **Compliance management is a spectrum**
 - Full IT Admin control to no IT control (End user tool)
- **Managed folders (Exchange 2007)**
 - Addresses only one end of the spectrum
 - Very little end user flexibility
- **Message Retention (Exchange 2010)**
 - Addresses both ends on the spectrum
 - Framework for IT admins to associate policy with mailboxes and system folders
 - Framework for end users to optionally associate policy with their folders and mail items

Message Retention & the Cloud

- **Retention policies managed separately for on-premises and the cloud**
 - Except when only archive in the cloud

Preserve: Migrating Policy to Cloud

- **Migrating Primary mailboxes to cloud:**
 - MRM policy not automatically migrated or synced
 - Scripts shipped to automate migration and sync*
 - Export-RetentionTags.ps1
 - Import-RetentionTags.ps1



*Location: %Program Files%\Microsoft\Exchange Server\V14\Scripts



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- Overview of Compliance in Exchange Online
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- Retention & Hold Policies
- Discovery

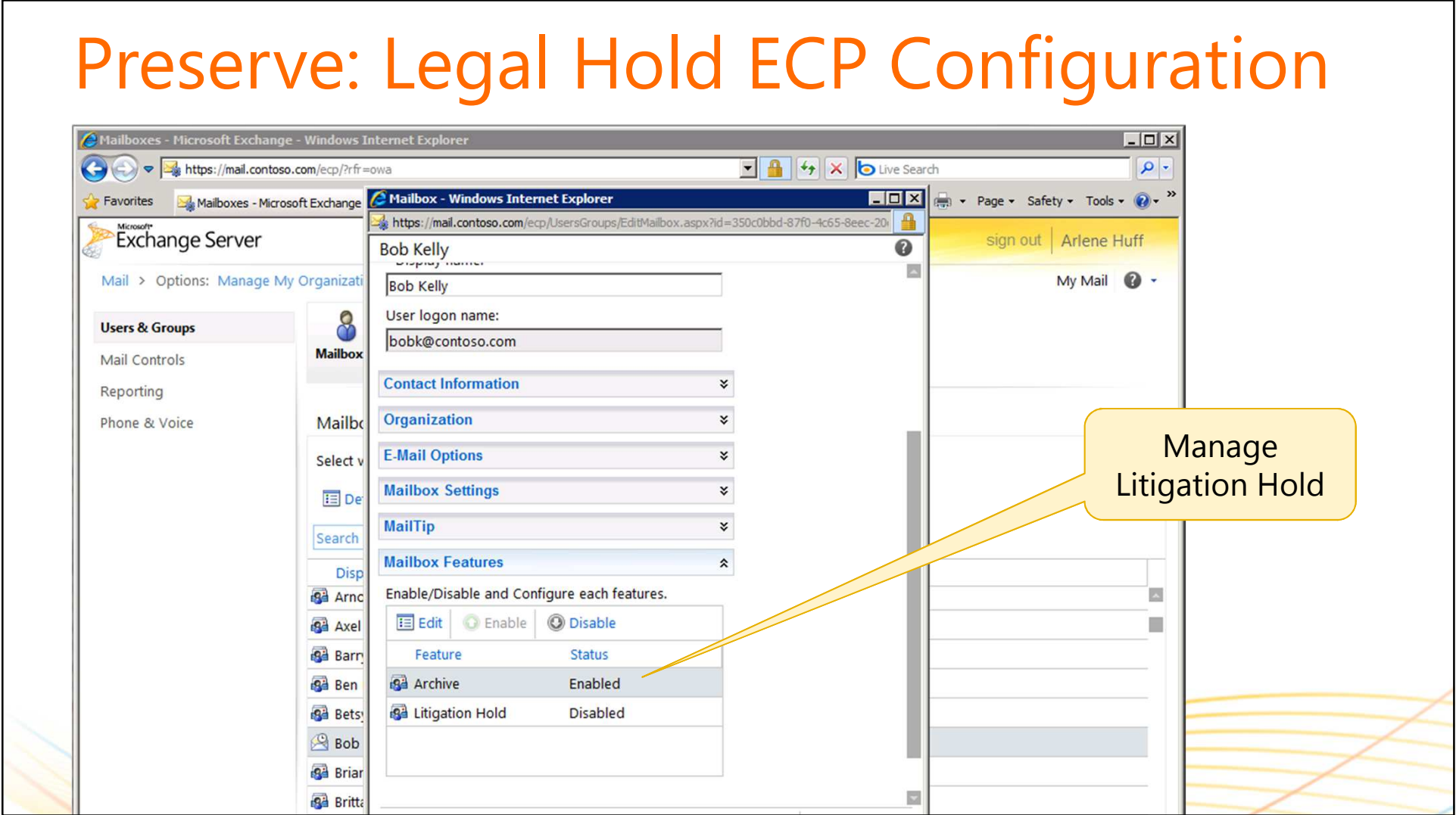


Preserve: Legal Hold Overview

- **Captures edits/deletes on a mailbox (user/admin access)**
- **User workflow is unchanged, items captured in hidden folders in Dumpster 2.0**
- **Users can receive notification they are on hold; eliminates manual process**
- **Multi-mailbox search retrieves items indexed in Dumpster 2.0**
- **No end-user impact**

Preserve items for recovery and discovery for a finite or indefinite period of time without impacting end user experience

Preserve: Legal Hold ECP Configuration



Preserve: Hold Policy IT Pro experience

Enable the hold policy from the mailbox settings page

Comment and URL tell the user how to comply

Note
Use this note to tell the user their mailbox is on litigation hold. It will appear in the user's mailbox if they are using Outlook 2010.
[Learn More](#)

Feature	Status
Archive	Disabled
Litigation Hold	Disabled

Preserve: Hold Policy

The screenshot shows the 'Account Information' pane in Microsoft Outlook. At the top, it displays the account name 'axeld Exchange'. Below this, a red-bordered box contains the following text: 'Modify settings for this account, and configure additional connections.' followed by a hold notification: 'This mailbox is on hold for the Contoso vs. Fabrikam case. All e-mail is being automatically captured. Do not delete any pertinent documents stored elsewhere pertaining to technology shared with the Fabrikam Company.' Below the notification is a link labeled 'More Information'. At the bottom of the pane, there is a section for 'Automatic Replies (Out of Office)' with a brief description.

Callout 1: IW is told how to comply (no action needed for email)

Callout 2: URL links to additional info

Preserve: Hold Management & the Cloud

- **Manage *Legal Hold* against current location of the primary mailbox**



Single Item Recovery & Fixed Retention

- **Fixed Retention:** The ability to preserve user data for a rolling window of time that overrides user actions
- **Can be achieved** using Single Item Recovery (SIR)
- **SIR captures all edits** and stores them for the specified time period

```
> Set-Mailbox -Identity bobk -SingleItemRecoveryEnabled $true
```


Single Item Recovery

- **Off by default on-premises**
- **On by default in datacenter**
 - With default period of 14 days
 - Extend beyond 14 days via Service Request
 - Not recommended beyond 1 year retention

Preserve: Journaling

IT Pros Can Continue to Journal to Mailbox or Archive

Feature	Benefit
Transport Journaling	<ul style="list-style-type: none">• Ability to journal individual mailboxes or SMTP address (hosted archive)• Detailed reports per To/Cc/Bcc/Alt-Recipient and DL expansion
Journal Report de-duplication	<ul style="list-style-type: none">• Customers report up to 40% duplication of journal reports (Example: internal/external recipients on same DL)• Exchange Server 2010 creates one report per message• Can dramatically reduce hosted archive storage costs

Discover: Multi-Mailbox Search

Goals and Assumptions

- Performs distributed search across end user mailboxes located on multiple servers
- Search is throttled and parallelized
- Results are copied to discovery mailbox after search
- Admins by default do not have access to search all mailboxes, specific RBAC Discovery Role is required
- Single discovery experience across premise and cloud

Discover: Multi-Mailbox Search

The screenshot shows the 'Mailbox Search' interface in a Windows Internet Explorer browser window. The interface is divided into several sections:

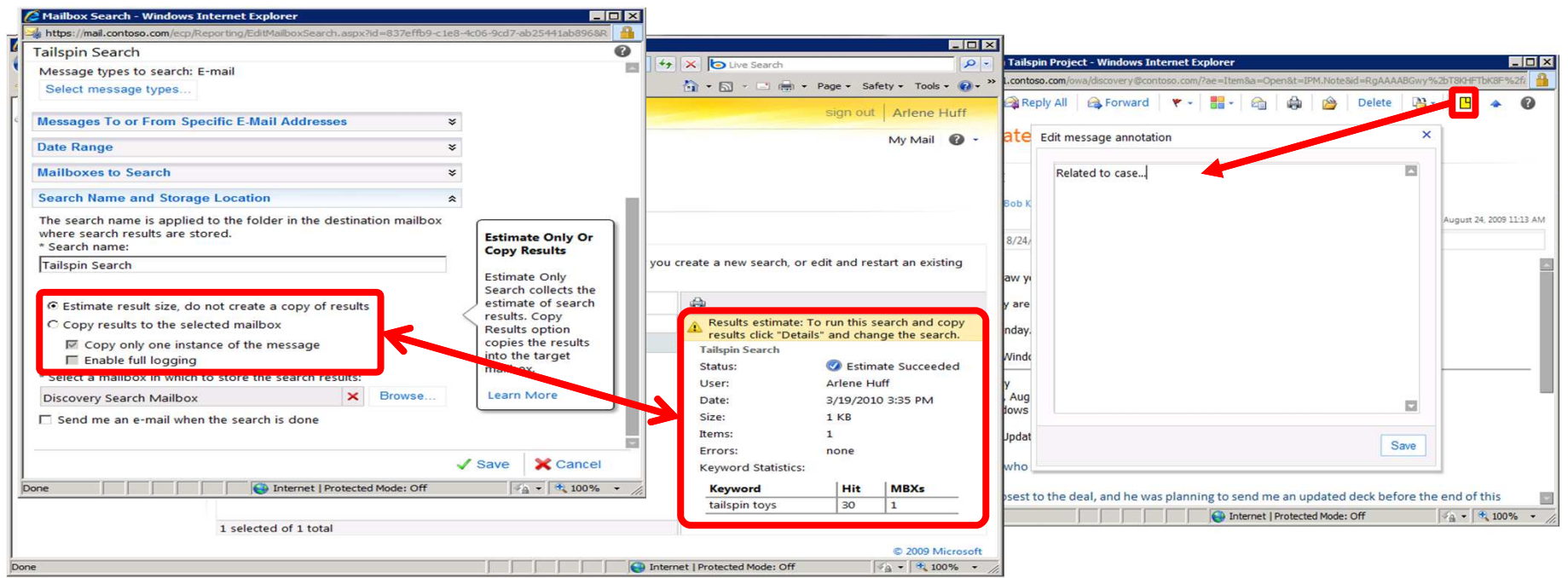
- Keywords:** A text box containing 'tailspin'. A callout points to this section with the text: "Rich search criteria and targeting options".
- Search Scope:** Radio buttons for "Search all mailboxes" and "Search specific mailboxes or the mailboxes of members of public groups:". The second option is selected. A list below shows "Bob Kelly" with "Add..." and "Remove" buttons.
- Search Name and Storage Location:** A section with a "Search name" field containing "Tailspin e-Discovery". A callout points to this section with the text: "Delegate capability to specialist users".
- Search Name and Storage Location (Detailed):** A sub-section explaining that the search name is applied to the folder in the destination mailbox. It includes a "Search name" field with "Tailspin e-Discovery" and a "Select a mailbox in which to store the search results:" dropdown menu with "Discovery Search Mailbox" selected. A callout points to this section with the text: "Results stored in dedicated discovery mailbox".
- Search Results:** A section titled "Tailspin e-Discovery" showing search details:

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

At the top right of the browser window, the user "Arlene Huff" is logged in, with a "Sign out" link and a "My Mail" button.

Empower compliance officers to conduct multi-mailbox searches with ease

Discover: Preview, De-duplication,



- Search preview provides info on estimated number of results with keyword statistics before copying result set to designed discovery mailbox
- De-duplication of search results copies only one instance of a message
- Searchable annotation offers tagging of reviewed items



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