



Dedicated & ITAR-Support Plans

Personal Archiving in Exchange Online

IT Professional & Customer Helpdesk Feature Guide

Exchange Online Personal Archiving Feature Guide - 12.3 Release

Office 365 Dedicated & ITAR-Support Plans

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About this guide

The content of this guide describes the Personal Archiving feature of Microsoft Exchange Online for the **dedicated and ITAR-support plans of Office 365 for enterprises**. The guide addresses the following personal archiving topics:

- Purpose and use overview
- Provisioning
- Administration
- Support roles and responsibilities
- Additional resources

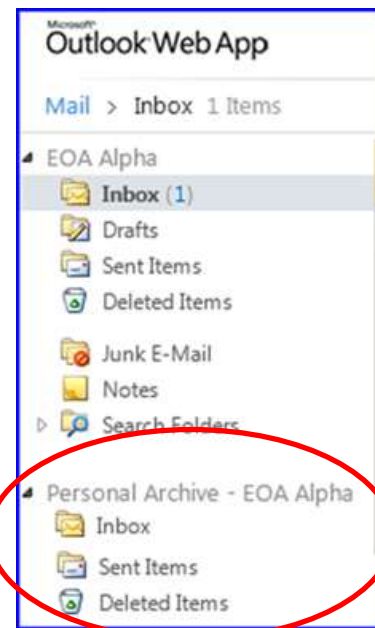


Note: Not all generally available documentation produced by Microsoft for the personal archiving feature of Exchange Server 2010 is applicable to the dedicated and ITAR-support plan offerings of Office 365 for enterprises. Documentation simply labeled *Office 365 for enterprises* may only pertain to the multi-tenant version of Office 365. Content accessible via links provided within this guide and via links shown on the [Exchange Online page](#) of the Release Documentation and Training Material area within the **Office 365-D/ITAR Customer Extranet site** are the most relevant.

What is Personal Archiving?

In Microsoft Exchange Server 2010, the personal archiving feature provides a user with an alternative location to store historical messaging data. A personal archive is an additional mailbox (a.k.a, an *archive mailbox*) enabled for a mailbox user. Users of Outlook 2007, later versions of Outlook, or Outlook Web App have seamless access to their archive mailbox. When using these client applications, users can view an archive mailbox and move or copy messages between their primary mailbox and the archive. A personal archive presents a consistent view of messaging data to a user and eliminates the user overhead required to manage .pst files. A personal archive has the following characteristics:

- Provisioned as a separate physical mailbox logically connected to the primary or base mailbox
- Outlook automatically disables the ability to use the "Auto Archive" feature when an archive mailbox is enabled
- *Archive warning quota* and *Recoverable Items folder quota* are unique for the archive mailbox
- Can be moved separately or with the primary mailbox (default is to move with the primary mailbox)
- Automatically indexed and is searchable & discoverable
- Can be deprovisioned (deleted) separately
- Will remain as a stub or disconnected mailbox for 30 days (same as primary mailbox)
- Can be reconnected if deleted in error
- Viewable & accessible in Outlook 2007, later versions of Outlook, or the premium version of Outlook Web App (light version of Outlook Web App is not supported)



Note: Outlook 2007 users require the Office 2007 Cumulative Update for February 2011. Some differences in archive support exist between Outlook 2010 and Outlook 2007. For more information, see Exchange Team Blog article [Yes Virginia, there is Exchange 2010 archive support in Outlook 2007](#).

Placing content within a personal archive

A user provisioned with a personal archive can use the following options to place content within a personal archive:

- **Move or copy messages manually:** Mailbox users can manually move or copy messages from their primary mailbox or a .pst file to their archive mailbox. The archive mailbox appears as another mailbox or .pst file in Outlook and Outlook Web App.
- **Move or copy messages using Inbox rules:** Mailbox users can create Inbox rules in Outlook or Outlook Web App to automatically move messages to a folder in their archive mailbox.
- **Import messages from .pst files:** Use Outlook to manually import messages from a .pst file to the archive or primary mailbox of a user.
- **Move messages using retention policies:** Use Messaging Records Management 2.0 retention policies to automatically move messages to the archive. Archive policies are implemented by creating retention tags that use the **Move to Archive** retention action. Messages are moved to a folder in the archive mailbox that has the same name as the source folder in the primary mailbox. If a folder with the same name does not exist in the archive mailbox, it is created when the Managed Folder Assistant moves a message. Users also can apply a personal tag to move messages to the archive.



Note: Managed folder mailbox policies are a function of MRM 1.0. These policies cannot be applied to mailboxes that have a personal archive. Managed content settings created for managed folders cannot use the **Move to archive** action. To learn more about managed folders, see [Understanding Managed Folders](#) within Microsoft TechNet.

Personal archive size and quota limits

For Plan 2D mailboxes purchased by customers of Exchange Online for dedicated and ITAR-support plans, see the following values apply to the primary mailbox size, personal archive size, and applicable quotas.

Primary Mailbox Size	Archive Mailbox Size *	Archive warning quota	Recoverable Items folder quota
25 GB	100 GB	90 GB	30GB

* Allocation includes messaging content held for litigation purposes if Litigation Hold option is set on primary mailbox.

Provisioning a personal archive

The personal archive feature is only available to Exchange Online Plan 2D mailboxes purchased by customers of Exchange Online for dedicated and ITAR-support plans (see the latest version of the *Exchange Online Service Description for Office 365 Dedicated Plans* available at the Microsoft Download Center site for [Microsoft Office 365 Dedicated Subscription Plans](#)). To utilize the feature, customers should contact their Microsoft Service Delivery Manager to submit a Change Request (CR) to request the personal archive feature. The CR process includes a customer review of prerequisites and also involves the initiation of the discovery process to support the implementation.

Within the dedicated and ITAR-support plans of Exchange Online, a personal archive is provisioned by setting specific values in a custom extension attribute associated with the on-premises user object. The custom attribute is used to provision an Exchange Online mailbox and is unique for each customer environment. The attribute is propagated to the Active Directory environment of Office 365 by the Microsoft Managed Solutions Service Provisioning Provider (MMSSPP) tool. A provisioning script within Office 365 creates the personal archive and the Exchange Online Managed Folder Assistant (MFA) makes the archive available to the end user.

In the entry below, `ExtensionAttribute9` is used as an example. The values **TYPE=EP2D** and **PA=1** represent the required settings to initiate the provisioning of a personal archive.

```
ExtensionAttribute9:MBX=EX;REG=NA;TYPE=EP2D;PA=1;
```

The archive mailbox will become visible and usable to the end user within 24 hours after the extension attribute has been set. To accelerate the MFA step, an Exchange Administrator can use the following remote Windows PowerShell cmdlets to manually invoke the MFA:

```
[PS] Get-Mailbox -Identity <MailboxOrMailUserIdParameter> | fl *archive*
```

Note: If the **ArchiveGuid** in the list of values returned is a string of all zeros, the archive has not been provisioned; if the **ArchiveGuid** is a non-zero value, the following cmdlet can be executed:

```
[PS] Start-ManagedFolderAssistant -Identity <MailboxOrMailUserIdParameter>
```



Notes:

1. To execute the `ManagedFolderAssistant` cmdlet, the user must be a member of the **User MRM Management** role group within the self-service administration model of Exchange Online.
2. If an archive mailbox exists in the customer premises environment, both the base and archive mailboxes will appear in Exchange Online following the initial on-premises to online migration.

⇒ **Important:** To initially provision an archive mailbox and to maintain the existence of an archive mailbox, the **TYPE=EP2D** and **PA=1** values **must** exist within the on-premises Active Directory extension attribute used for Exchange Online mailbox provisioning. The absence of either value (or setting the PA value to "0") will prevent a new archive from being provisioned or, in the case of an existing archive, will result in the user archive being disabled.

Administration of personal archives

Administrative functions to manage personal archives include the following:

- Confirming the existence of an archive mailbox
- Disabling, reconnecting, and renaming a personal archive
- Direct access, single item recovery, or execution of compliance actions against a personal archive
- Importing into, or exporting the content of, a personal archive

Confirming archive mailbox existence

To determine if an archive mailbox is associated with the primary mailbox of a user, the following remote Windows PowerShell cmdlet can be used:

```
Get-Mailbox -Identity <MailboxOrMailUserIdParameter> -Archive
```

Disabling, reconnecting, and renaming an archive mailbox

Archive without compliance restrictions

The following table summarizes the administrative actions that can be performed to disable or reconnect an archive mailbox configured without compliance restrictions:

Administrative Action (no Litigation Hold setting)	Procedure
Disable Archive Mailbox	<p>To disable an archive mailbox, alter the PA value of the extension attribute of the user object used for provisioning from 1 (enable) to 0 (disable). Shown below is an example which uses ExtensionAttribute9.</p> <pre data-bbox="594 478 1386 510">ExtensionAttribute9:MBX=EX;REG=NA;TYPE=EP2D;PA=0;</pre> <p>With 24 hours, the archive mailbox of the user will no longer be viewable or accessible. The archive mailbox will be retained by Exchange Online for a 30 day period (the default deleted items retention policy period). A disabled archive mailbox can be reconnected if the reconnection request is invoked within 30 days (see Reconnect Archive Mailbox below).</p>
Reconnect Archive Mailbox	<p>When an archive mailbox is set to the disable state, the mailbox is disconnected from the primary mailbox. A disconnected personal archive is retained in the mailbox database for a 30 day period (the default deleted items retention policy period). During this time, the personal archive and its original contents can be recovered and reconnected by altering the PA value of the provisioning extension attribute of the user object from 0 (disable) to 1 (enable). Shown below is an example which uses ExtensionAttribute9.</p> <pre data-bbox="594 951 1386 982">ExtensionAttribute9:MBX=EX;REG=NA;TYPE=EP2D;PA=1;</pre> <p>After the value is set, the provisioning actions and optional steps in the Establishing a personal archive section apply.</p>
Renaming an Archive Mailbox	<p>To change the display name of an archive mailbox, an escalation template must be completed and submitted as a service request to Microsoft Online Services Support with the following information:</p> <ol style="list-style-type: none"> <li data-bbox="581 1178 1317 1241">1. The Simple Mail Transfer Protocol (SMTP) address of the primary mailbox associated with the archive mailbox. <li data-bbox="581 1241 1317 1327">2. The requested display name of the archive mailbox. By default, the display name of the archive mailbox is the following format: <i>Personal Archive - Mailbox User's Display Name</i>

As described in the [Provisioning a personal archive](#) section, the following cmdlet can be used to verify the status of a personal archive:

```
[PS] Get-Mailbox -Identity <MailboxOrMailUserIdParameter> | fl *archive*
```

If the **ArchiveGuid** value in the list of values returned is a string of all zeros, the archive does not exist; if the **ArchiveGuid** value is non-zero, the personal archive exists. If the user cannot access a personal archive that has been confirmed as existing, the following cmdlet can be executed to force the Managed Folder Assistant to make the archive mailbox visible:

```
[PS] C:\temp>Start-ManagedFolderAssistant -Identity <MailboxOrMailUserIdParameter>
```

Archive under Litigation Hold

If a primary mailbox has been placed under **Litigation Hold**, a personal archive mailbox also will be placed in the same state. Specific steps must be followed to disable or reconnect an archive mailbox in legal hold status.

As described in the prior section, an archive mailbox is disabled only by altering the “PA” value within the Active Directory extension attribute used by the user object for provisioning. If the primary and archive mailboxes are under Litigation Hold, an attempt to disable only the archive mailbox will **not** be executed by Exchange Online. If an attempt is made to disable a primary mailbox in a Litigation Hold state through (a) an implicit deprovisioning action (e.g. setting the mailbox deletion flag for the customer environment on the mailbox type attribute), (b) moving a user object to an Organizational Unit within Active Directory which is out-of-scope of MMSSPP synchronization, or (c) deleting the on-premises user object using Forefront Identity Manager (FIM) or other manual method, MMSSPP will **not** process the disable action for the primary mailbox. The customer must first manually disable Litigation Hold on the primary mailbox before initiating deprovisioning steps within the on-premises environment. To verify Litigation Hold status on a mailbox, the following remote Windows PowerShell cmdlet can be executed:

```
[PS] Get-Mailbox -Identity <MailboxOrMailUserIdParameter> | fl LitigationHoldEnabled
```

To disable only an archive mailbox or the primary and archive mailboxes of a user when these mailboxes are in a Litigation Hold state, an Exchange Administrator can perform either of the following:

1. Save all messages within the mailbox(es) to be disabled by using the Exchange Control Panel (ECP) to run an eDiscovery search, disable Litigation Hold, and then either disable only the archive mailbox or follow established procedures to remove all mailboxes associated with a specific user.
2. Complete the Microsoft Online Services Support escalation template required to request a manual .pst export of either the archive mailbox or the primary and archive mailboxes (including the Recoverable Items folder), remove the Litigation Hold status of the mailbox, and then either disable only the archive mailbox or follow established procedures to remove all mailboxes associated with a specific user. The manual .pst export request process is described in the [Importing into an Archive Mailbox and Exporting an Archive Mailbox](#) section.

A disabled archive mailbox that was under Litigation Hold status can be restored within the 30 day deleted mailbox retention period by following the procedures summarized in the [Reconnect Archive Mailbox](#) description.

Accessing the Archive Mailbox of a User

If the need arises for an Exchange Administrator to access the archive mailbox of a user for administrative or compliance reasons, the following scenarios and results of each scenario apply:

Access Action	Conditions and Results
Direct Access	If an Exchange Administrator has permissions to access the primary mailbox of a user, the administrator will be able to access the archive mailbox of the user using Outlook, Outlook Web App, or MFCMAPI (Microsoft Exchange Server MAPI Editor).
Single Item Recovery	If Single Item Recovery (SIR) is enabled for the primary mailbox (default at this time for Exchange Online), then SIR is automatically enabled for the archive mailbox.
Multi-Mailbox Search (eDiscovery) and Non-Owner Audit Logging	Execution of a multi-mailbox search will include the search of all archive mailboxes. The execution of non-owner audit log creation will generate a report which includes actions performed against archive mailboxes.

Importing into an Archive Mailbox and Exporting an Archive Mailbox

Messages can be imported into an archive mailbox and an entire archive mailbox can be exported. The following scenarios and conditions apply:

Import/Export Action	Conditions and Results
.pst import into an archive mailbox	Only an end user can use the Outlook Import and Export Wizard to import a .pst into their personal archive. ECP or a remote Windows PowerShell cmdlet to perform the import are not available to an Exchange Administrator.
Manual .pst export of an archive mailbox – <i>user invoked</i>	The ability for a user to manually perform a .pst export is not available after an archive mailbox has been provisioned for the user.
Manual .pst export of an archive mailbox – <i>administrator invoked</i>	The ability for an Exchange Administrator to export an archive mailbox as a .pst file is not available. A request can be placed with Microsoft Online Service Support for assistance.

⇒ **Important:** When the Customer Management Portal (CMP) is used to export a primary mailbox, CMP is **not** capable of exporting an associated archive mailbox at this time. Microsoft Online Services Support can be contacted to perform a manual .pst export per the administrator invoked instructions described above.

Supporting personal archives

Prior to placing a request for support with Microsoft Online Services Support (MOSSUP), customers are expected to first perform specific checks and diagnostics to either identify issues that may be within their environment or to gather information which may be required to complete an escalation template. This section describes support roles and responsibilities and also includes a description of troubleshooting resources.

Technical Support Roles and Responsibilities

The following represents an overview of roles and responsibilities involving the customer and MOSSUP:

Support Area	Customer	Microsoft
Confirmation correct values to either provision or disable an archive mailbox have been placed in the on-premises Active Directory extension attribute used for Exchange mailbox provisioning.	✓	✗
Confirmation an archive mailbox exists, is accessible, or has been disabled.	✓	✗
Providing required assistance to either provision or disable an archive mailbox if automated processes do not execute properly.	✗	✓

Troubleshooting Resources

Available for customer use are support articles provided by Microsoft which describe potential issues related to personal archiving and possible issue resolution steps. To retrieve relevant support articles, use one of the following methods:

1. Access support.microsoft.com and enter the following in the search window:

exchange archive mailbox & "online dedicated"

2. Click on the following link (which represents the search query of option #1):

<http://support.microsoft.com/search/default.aspx?query=exchange+archive+mailbox+%26+%22online+dedicated%22&catalog=LCID%3D1033&mode=r>

Additional Resources

Within the Customer Extranet site for dedicated and ITAR-support plan customers of Office 365 for enterprises, the [Release Documentation and Training Materials area](#) contains Frequently Asked Questions (FAQs) content and other supporting information for the Personal Archiving feature – see the *Exchange Online* landing page.

Personal Archiving Frequently Asked Questions (FAQs)

Personal Archiving is an Exchange Online feature within the dedicated and ITAR-support plans of Office 365 for enterprises. The information below represents common questions and answers related to the Personal Archiving feature. The rows representing updates since the last release of the document are shaded in **orange**.

Question/Answer	
1.	<p>What are the prerequisites that a customer must meet to qualify for the Personal Archiving feature?</p> <p>The primary prerequisite is an Exchange Plan 2D mailbox subscription for each user to be provisioned with an archive. A Microsoft Account Manager can assist with the process to order additional Exchange Plan 2D mailboxes.</p>
2.	<p>Is additional Exchange Online infrastructure required to support the Personal Archive feature?</p> <p>Ordinarily, no; however, the total number of Exchange Online Plan 2D mailboxes requiring a personal archive is a factor. Feedback will be provided to the customer following the review of the discovery questionnaire responses provided by the customer during the Change Request process.</p>
3.	<p>Will an archive mailbox become available automatically to an end user for access via Outlook and Outlook Web App without any end user initiated actions?</p> <p>The Exchange administrator of a customer environment is responsible for modifying the Active Directory extension attribute of the user object that is used to initiate the provisioning of the archive mailbox. The archive mailbox will appear approximately 24 hours after the extension attribute is modified.</p>
4.	<p>Can a personal archive be accessed by a mobile client?</p> <p>No, only Outlook 2007 (with the latest Office 2007 cumulative update), later version of Outlook, and the premium version of Outlook Web App can access an archive mailbox.</p>
5.	<p>Can Outlook rules be configured to manage archive mailbox content or move content into, or out of, an archive mailbox?</p> <p>Yes, an archive mailbox will appear as a "specified" folder option in the Outlook Rules Wizard.</p>

Question/Answer	
6.	<p>If a user has FULL mailbox access to another user's mailbox, does this also allow the FULL access user to access to the other user's Personal Archive using Outlook, Outlook Web App, or MFCMAPI?</p> <p>Yes, if the IT Admin is permissioned to access the primary mailbox, the Admin will automatically have the ability to access both the primary and the archive mailbox with MFCMAPI. The Admin also can view the archive using either Outlook or the premium version of Outlook Web App.</p>
7.	<p>If a user deletes content within their archive, is the content recoverable and will the retention policy for the user continue to exist?</p> <p>Yes, the single item recovery capability can be used and the retention policy for the user will be maintained.</p>
8.	<p>Can an end user or administrator export mail from a personal archive by following the same steps required to export content from a primary mailbox?</p> <p>No, the ability for an end user or administrator to manually perform a .pst export is not available after an archive mailbox has been provisioned for the user. However, a customer's Exchange Administrator can place a request with Microsoft Online Services Support to have a mailbox exported.</p>
9.	<p>Can the Customer Management Portal (CMP) export an archive mailbox?</p> <p>At this time, no, CMP is not capable of exporting an archive mailbox. Microsoft Online Services Support can be contacted to provide archive mailbox export assistance.</p>
10.	<p>Can .pst content be imported into an archiving mailbox?</p> <p>Yes, the end user can use the Outlook Import and Export Wizard to import .pst content. An Exchange administrator cannot use ECP or remote Windows PowerShell to perform the import.</p>
11.	<p>If a primary mailbox is placed on Litigation Hold, does this condition also apply to the archive mailbox?</p> <p>Yes, when a primary mailbox is placed on Litigation Hold, the personal archive also is placed in the same state. An attempt to deprovision a personal archive using the PA=0 value within the Active Directory extension attribute for the user object will not result in disabling the personal archive.</p>
12.	<p>Will the results of a multi-mailbox search include all archive mailboxes?</p> <p>Yes, the archive mailbox is searched similar to a primary mailbox.</p>
13.	<p>Will the execution of non-owner audit logging generate a report which includes actions performed against archive mailboxes?</p> <p>Yes, non-owner audit logs will include actions performed against archive mailboxes.</p>