

Exchange 2010 Retention Policy

Background

In Exchange 2003, Mailbox Management Policy functionality was available. Many agencies used this to set parameters for automatic deletion of items (e.g., Sent Items, Calendar, Deleted Items, etc.). The Mailbox Management Policy functionality was discontinued with in Exchange 2010.

In Exchange 2010, Retention Policy functionality can be used to set similar parameters.

Technical Notes

1. Retention policy application is at the mailbox level.
2. The Store default is to retain items deleted from the Deleted Items system folder for 31 days. This is called the Dumpster.
3. Single Item Recovery functionality prevents individual users from deleting items from the Dumpster, ensuring that deleted items are recoverable without using backup media. More information can be found at the following links:

[http://technet.microsoft.com/en-za/library/ee364755\(en-us\).aspx](http://technet.microsoft.com/en-za/library/ee364755(en-us).aspx)

<http://blogs.technet.com/b/exchange/archive/2009/09/25/3408389.aspx>

CTS Role and Responsibilities

1. CTS will create all Retention Policies for agencies. A standard naming convention will be used including the agency acronym.
2. CTS has made changes to the Delegated Administrator Model to allow all agencies to apply a Retention Policy directly to mailboxes.

Agency Role and Responsibilities

1. Agencies will need an Enterprise Exchange CAL (eCAL) if they wish the Retention Policy to apply to anything but system folders. In other words, if the mailbox does not have an eCAL, the Retention Policy can only apply to system folders.
2. Ensure the administrator who will apply the policy is included in the U-S-[Agency Identifier] Delegated Security Administrators Group for appropriate role assignment.
3. Request CTS build Mailbox Management Policies by submitting a ticket to the CTS Service Desk specifying the desired retention period and specific item type(s) to which the policy is to apply.

4. Applying the policy, once created, at the mailbox level, using the Get-Mailbox, Enable-Mailbox, and/or Create-mailbox delegated admin functions. The GUI provides a check box and browse to select Retention Policy application. NOTE: there is not currently a GUI option to enable single item recovery.

The policy will need to be applied to new mailboxes at the time they are created.

Additional information about creating new mailboxes, changing existing mailboxes, and applying Single Item Recovery is available in the *Agency Delegated Administrator Guide*, available online: http://cts.wa.gov/projects/shared_email/technical_resources.aspx

5. Agency administrators will be able to view, but must not apply, another agency's policy to their mailboxes.

Sample Retention Policy and Tag

Sample Retention Behavior

This will remove items from "Deleted Items" 7 days after they are deleted. Items that are currently in "Deleted Items" will start their counter when the policy is set on the mailbox.

The items will remain in the dumpster for 31 days and will be recoverable. This does not count against the mailbox quota. It is the same behavior as we had in 2003.

Sample Retention Policy

Name : AGY Retention Policy

RetentionPolicyTagLinks : {Deleted Items after 7 Days (Action: Delete and Recover)}

Sample Retention Policy Tag

Note: these tags may apply to more than one policy created by CTS.

Identity : Deleted Items after 7 Days (Action: Delete and Recover)

RetentionEnabled : True

RetentionAction : DeleteAndAllowRecovery

AgeLimitForRetention : 7.00:00:00

MoveToDestinationFolder :

TriggerForRetention : WhenDelivered

MessageFormatForJournaling : UseTnef

Type : DeletedItems

Comment : This MRMv2 Policy is used to remove Deleted Items after 1 week

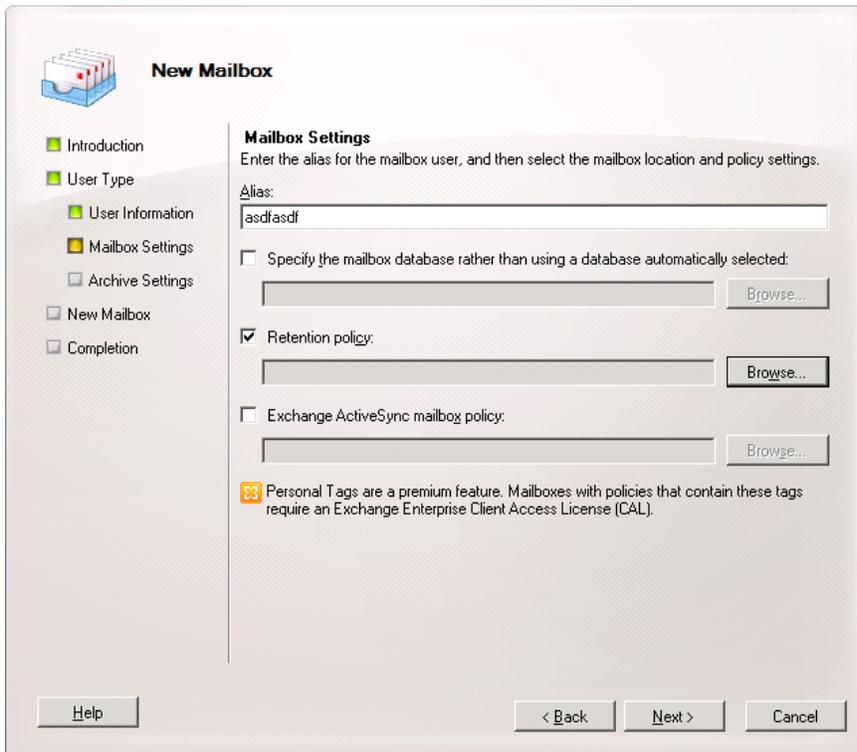
Name : Deleted Items after 7 Days (Action: Delete and Recover)

How To: Apply to All 2010 Mailboxes

1. Open Exchange Management Shell
2. Set-ADServerSettings -RecipientViewRoot ssv.wa.lcl/agy
3. Get-Mailbox -ResultSize unlimited | ?{\$_.RecipientTypeDetails -notlike "legacymailbox"} | Set-Mailbox -RetentionPolicy "AGY Retention Policy"

How To: Set the Retention Policy on New Mailboxes at Time of Creation

1. Click Retention policy and choose Browse



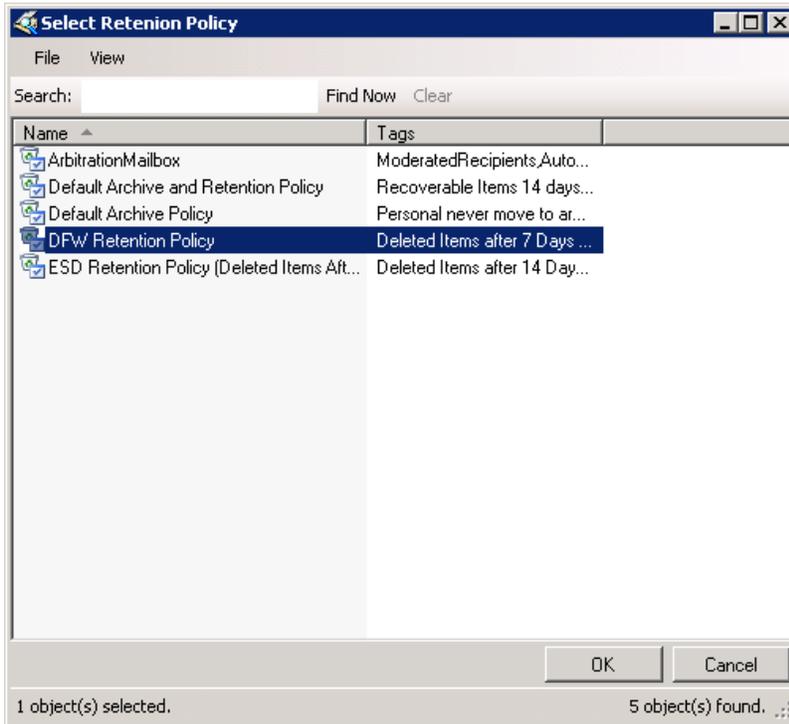
The screenshot shows the 'New Mailbox' wizard in the Exchange Management Console. The 'Mailbox Settings' step is active, indicated by a yellow square in the left-hand navigation pane. The main area contains the following fields and options:

- Alias:** A text box containing 'asdfasdf'.
- Specify the mailbox database rather than using a database automatically selected: A text box with a 'Browse...' button.
- Retention policy: A text box with a 'Browse...' button.
- Exchange ActiveSync mailbox policy: A text box with a 'Browse...' button.

At the bottom of the main area, there is a warning icon and text: "Personal Tags are a premium feature. Mailboxes with policies that contain these tags require an Exchange Enterprise Client Access License (CAL)."

At the bottom of the wizard, there are three buttons: 'Help', '< Back', and 'Next >', and a 'Cancel' button.

2. Browse to select a policy and click **OK**



3. Click **Next**

