Messaging records management

8/10/2020 • 7 minutes to read • Edit Online

Users send and receive email every day. If left unmanaged, the volume of email generated and received each day can inundate users, impact user productivity, and expose your organization to risks. As a result, email lifecycle management is a critical component for most organizations.

Messaging records management (MRM) is the records management technology in Exchange Server and Exchange Online that helps organizations manage email lifecycle and reduce the legal risks associated with email. Deploying MRM can help your organization in several ways:

- **Meet business requirements**: Depending on your organization's messaging policies, you may need to retain important email messages for a certain period. For example, a user's mailbox may contain critical messages related to business strategy, transactions, product development, or customer interactions.

- **Meet legal and regulatory requirements**: Many organizations have a legal or regulatory requirement to store messages for a designated period and remove messages older than that period. Storing messages longer than necessary may increase your organization's legal or financial risks.

- **Increase user productivity**: If left unmanaged, the ever-increasing volume of email in your users' mailboxes can also impact their productivity. For example, although newsletter subscriptions and automated notifications may have informational value when they're received, users may not remove them after reading (often they're never read). Many of these types of messages don't have a retention value beyond a few days. Using MRM to remove such messages can help reduce information clutter in users' mailboxes, thereby increasing productivity.

- **Improve storage management**: Due to expectations driven by free consumer email services, many users keep old messages for a long period or never remove them. Maintaining large mailboxes is increasingly becoming a standard practice, and users shouldn't be forced to change their work habits based on restrictive mailbox quotas. However, retaining messages beyond the period that's necessary for business, legal, or regulatory reasons also increases storage costs.

MRM provides the flexibility to implement the records management policy that best meets your organization's requirements. With a good understanding of MRM, In-Place Archiving, and In-Place Hold, you can help meet your goals of managing mailbox storage and meeting regulatory retention requirements.

Looking for management tasks related to MRM? See Messaging Records Management Procedures.

MRM in Exchange Server and Exchange Online

In Exchange Server and Exchange Online, MRM is accomplished through the use of retention tags and retention policies. Retention tags are used to apply retention settings to an entire mailbox and default mailbox folders such as Inbox and Deleted Items. You can also create and deploy retention tags that Outlook 2010 and later and Outlook on the web (formerly known as Outlook Web App) users can use to apply to folders or individual messages. After they're created, you add retention tags to a retention policy and then apply the policy to users. The Managed Folder Assistant processes mailboxes and applies retention settings in the user's retention policy. To learn more about retention policies, see Retention tags and retention policies.

When a message reaches its retention age specified in the applicable retention tag, the Managed Folder Assistant takes the retention action specified by the tag. Messages can then be deleted permanently or deleted with the ability to recover them. If an archive has been provisioned for the user, you can also use retention tags to move items to the user's In-Place Archive.

MRM strategies

You can use retention policies to enforce basic message retention for an entire mailbox or for specific default folders. Although there are several strategies for deploying MRM, here are some of the most common:

Remove all messages after a specified period: In this strategy, you implement a single MRM policy that removes all messages after a certain period. In this strategy, there's no classification of messages. You can implement this policy by creating a single default policy tag (DPT) for the mailbox. However, this doesn't ensure that messages are retained for the specified period. Users can still delete messages before retention period is reached.

Move messages to archive mailboxes: In this strategy, you implement MRM policies that move items to the user's archive mailbox. An archive mailbox provides additional storage for users to maintain old and infrequently accessed content. Retention tags that move items are also known as archive policies. Within the same retention policy, you can combine a DPT and personal tags to move items, and a DPT, RPTs, and personal tags to delete items. To learn more about archiving policies, see:

- **Exchange Server 2016**: In-Place Archiving

- **Exchange Online**: Archive Mailboxes in Exchange Online

> **NOTE**
>
> In an Exchange hybrid deployment, you can enable a cloud-based archive mailbox for an on-premises primary mailbox. If you assign an archive policy to an on-premises mailbox, items are moved to the cloud-based archive. If an item is moved to the archive mailbox, a copy of it isn't retained in the on-premises mailbox. If the on-premises mailbox is placed on hold, an archive policy will still move items to the cloud-based archive mailbox where they are preserved for the duration specified by the hold.

Remove messages based on folder location: In this strategy, you implement MRM policies based on email location. For example, you can specify that messages in the Inbox are retained for one year and messages in the Junk Email folder are retained for 60 days. You can implement this policy by using a combination of retention policy tags (RPTs) for each default folder you want to configure and a DPT for the entire mailbox. The DPT applies to all custom folders and all default folders that don't have an RPT applied.

> **NOTE**
>
> In Exchange Server, you can create RPTs for the Calendar and Tasks folders. If you don't want items in these folders or other default folders to expire, you can create a disabled retention tag for that default folder.

Allow users to classify messages: In this strategy, you implement MRM policies that include a baseline retention setting for all messages but allow users to classify messages based on business or regulatory requirements. In this case, users become an important part of your records management strategy - often they have the best understanding of a message's retention value.

Users can apply different retention settings to messages that need to be retained for a longer or shorter period. You can implement this policy using a combination of the following:

- A DPT for the mailbox

- Personal tags that users can apply to custom folders or individual messages

- (Optional) Additional RPTs to expire items in specific default folders

For example, you can use a retention policy with personal tags that have a shorter retention period (such as two days, one week, or one month), as well as personal tags that have a longer retention period (such as one, two, or

five years). Users can apply personal tags with the shorter retention periods for items such as newsletter subscriptions that may lose their value within days of receiving them, and apply the tags with longer periods to preserve items that have a high business value. They can also automate the process by using Inbox rules in Outlook to apply a personal tag to messages that match rule conditions.

Retain messages for eDiscovery purposes: In this strategy, you implement MRM policies that remove messages from mailboxes after a specified period but also retain them in the Recoverable Items folder for In-Place eDiscovery purposes, even if the messages were deleted by the user or another process.

You can meet this requirement by using a combination of retention policies and In-Place Hold and Litigation Hold or Litigation Hold. Retention policies remove messages from the mailbox after the specified period. A time-based In-Place Hold or Litigation Hold preserves messages that were deleted or modified before that period. For example, to retain messages for seven years, you can create a retention policy with a DPT that deletes messages in seven years and Litigation Hold to hold messages for seven years. Messages that aren't removed by users will be deleted after seven years; messages deleted by users before the seven year period will be retained in the Recoverable Items folder for seven years. To learn more about this folder, see Recoverable Items folder in Exchange Online.

Optionally, you can use RPTs and personal tags to allow users to clean up their mailboxes. However, In-Place Hold and Litigation Hold continues to retain the deleted messages until the hold period expires.

> **NOTE**
>
> A time-based In-Place Hold or Litigation Hold is similar to what was informally referred to as a rolling legal hold in Exchange 2010. Rolling legal hold was implemented by configuring the deleted item retention period for a mailbox database or individual mailbox. However, deleted item retention retains deleted and modified items based on the date deleted. In-Place Hold and Litigation Hold preserves items based on the date they're received or created. This ensures that messages are preserved for at least the specified period.

For more information

Messaging Records Management Terminology in Exchange 2013

Retention tags and retention policies

Retention tags and retention policies

8/10/2020 • 15 minutes to read • Edit Online

In Microsoft Exchange Server and Exchange Online, Messaging records management (MRM) helps organizations to manage email lifecycle and reduce legal risks associated with e-mail and other communications. MRM makes it easier to keep messages needed to comply with company policy, government regulations, or legal needs, and to remove content that has no legal or business value.

Watch this video for a quick overview of how to apply retention tags and a retention policy to a mailbox in Exchange Online.

Messaging Records Management strategy

MRM in Exchange Server and Exchange Online is accomplished by using retention tags and retention policies. Before discussing the details about each of these retention features, it's important to learn how the features are used in the overall MRM strategy. This strategy is based on:

- Assigning retention policy tags (RPTs) to default folders, such as the Inbox and Deleted Items.

- Applying default policy tags (DPTs) to mailboxes to manage the retention of all untagged items.

- Allowing the user to assign personal tags to custom folders and individual items.

- Separating MRM functionality 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.

The following figure illustrates the tasks involved in implementing this strategy.

1 **Create Retention Tags**
Retention tags are used to apply retention settings to messages and folders. There are three types of retention tags:
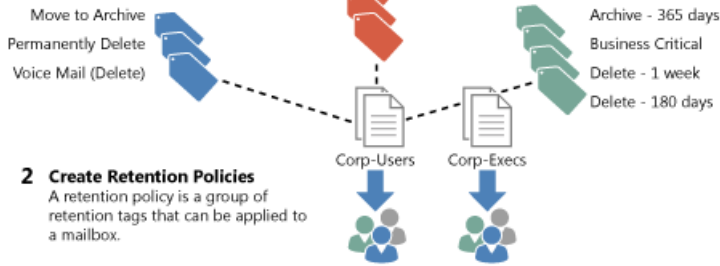
Default Policy Tag
A default policy tag (DPT) applies to all items that do not have a retention tag applied, either inherited or explicit.

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 and Outlook Web App users to apply retention settings to custom folders and individual items such as email messages.

Move to Archive
Permanently Delete
Voice Mail (Delete)

Archive - 365 days
Business Critical
Delete - 1 week
Delete - 180 days

Corp-Users   Corp-Execs

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**
A retention policy can have one DPT to move items to the archive, one DPT to delete items, one DPT to delete voice mail messages, 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.
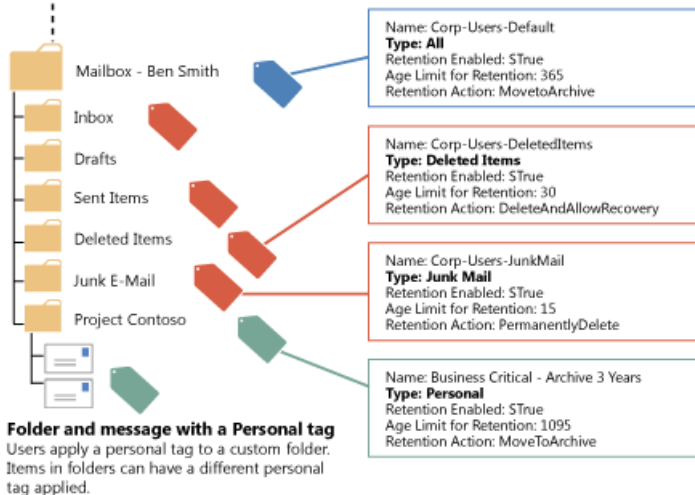
5 **The Managed Folder Assistant Processes Mailboxes**
The Managed Folder Assistant, a process that runs on Mailbox servers, processes mailboxes, applies retention settings to mailbox items, and takes the specified retention action.

6 **Mailbox Processed**
After a mailbox is processed, the DPT and RPTs are applied to the mailbox and default folders, and personal tags become available in Outlook and Outlook Web App. Retention action is taken on messages based on tag settings.

Mailbox - Ben Smith
Inbox
Drafts
Sent Items
Deleted Items
Junk E-Mail
Project Contoso

Name: Corp-Users-Default
Type: All
Retention Enabled: STrue
Age Limit for Retention: 365
Retention Action: MovetoArchive

Name: Corp-Users-DeletedItems
Type: Deleted Items
Retention Enabled: STrue
Age Limit for Retention: 30
Retention Action: DeleteAndAllowRecovery

Name: Corp-Users-JunkMail
Type: Junk Mail
Retention Enabled: STrue
Age Limit for Retention: 15
Retention Action: PermanentlyDelete

Name: Business Critical - Archive 3 Years
Type: Personal
Retention Enabled: STrue
Age Limit for Retention: 1095
Retention Action: MoveToArchive

Folder and message with a Personal tag
Users apply a personal tag to a custom folder. Items in folders can have a different personal tag applied.

Retention tags

As illustrated in the preceding figure, retention tags are used to apply retention settings to folders and individual items such as e-mail messages and voice mail. These settings specify how long a message remains in a mailbox and the action to be taken when the message reaches the specified retention age. When a message reaches its retention age, it's moved to the user's In-Place Archive or deleted.

new tag applied automatically to entire mailbox (default)

Help

*Name:

DPT - Delete 7 Years

Retention action:
○ ● Delete and Allow Recovery
○ Permanently Delete
○ Move to Archive

Retention action specifies the action that will be taken on an item

The **tag type** determines where and how a retention tag applies

Retention period:
○ Never
○ ● When the item reaches the following age (in days):

2555

Retention period specifies when the selected action will be taken

Comment:

Delete all items after 7 years (2555 days)

save   cancel

Retention tags allow users to tag their own mailbox folders and individual items for retention. Users no longer have to file items in managed folders provisioned by an administrator based on message retention requirements.
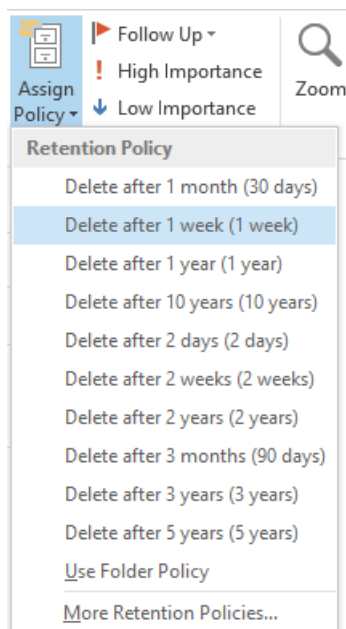
Types of retention tags

Retention tags are classified into the following three types based on who can apply them and where in a mailbox they can be applied.

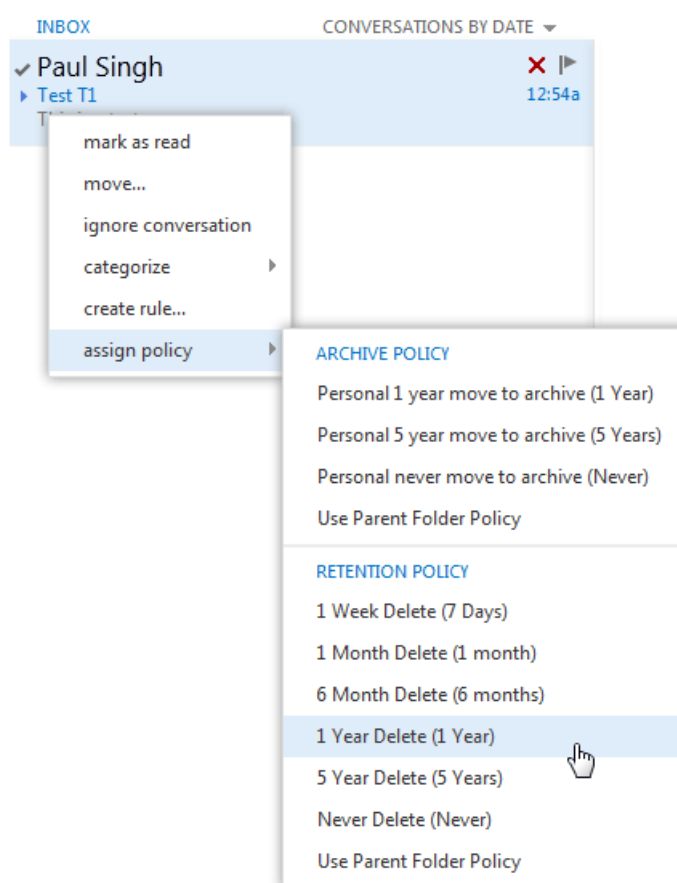| TYPE OF RETENTION TAG	APPLIED...	APPLIED BY...	AVAILABLE ACTIONS...	DETAILS
Default policy tag (DPT)	Automatically to entire mailbox A DPT applies to untagged items, which are mailbox items that don't have a retention tag applied directly or by inheritance from the folder.	Administrator	Move to archive Delete and allow recovery Permanently delete	Users can't change DPTs applied to a mailbox.

TYPE OF RETENTION TAG	APPLIED...	APPLIED BY...	AVAILABLE ACTIONS...	DETAILS
Retention policy tag (RPT)	Automatically to a default folder Default folders are folders created automatically in all mailboxes, for example: **Inbox**, **Deleted Items**, and **Sent Items**. See the list of supported default folders in Default folders that support Retention Policy Tags.	Administrator	Delete and allow recovery Permanently delete	Users can't change the RPT applied to a default folder.
Personal tag	Manually to items and folders Users can automate tagging by using Inbox rules to either move a message to a folder that has a particular tag or to apply a personal tag to the message.	Users	Move to archive Delete and allow recovery Permanently delete	Personal tags allow your users to determine how long an item should be retained. For example, the mailbox can have a DPT to delete items in seven years, but a user can create an exception for items such as newsletters and automated notifications by applying a personal tag to delete them in three days.

More about personal tags

Personal tags are available to Outlook or later and Outlook on the web (formerly known as Outlook Web App) users as part of their retention policy. In Outlook and Outlook on the web, personal tags with the **Move to Archive** action appear as **Archive Policy**, and personal tags with the **Delete and Allow Recovery** or **Permanently Delete** actions appear as **Retention Policy**, as shown in the following figure.

Follow Up ▾
! High Importance
↓ Low Importance

Assign Policy ▾   Zoom

Retention Policy
Delete after 1 month (30 days)
Delete after 1 week (1 week)
Delete after 1 year (1 year)
Delete after 10 years (10 years)
Delete after 2 days (2 days)
Delete after 2 weeks (2 weeks)
Delete after 2 years (2 years)
Delete after 3 months (90 days)
Delete after 3 years (3 years)
Delete after 5 years (5 years)
Use Folder Policy
More Retention Policies...

Outlook 2013

INBOX   CONVERSATIONS BY DATE ▾
✓ Paul Singh   ✗ ▶
▶ Test T1   12:54a

mark as read
move...
ignore conversation
categorize   ▸
create rule...
assign policy   ▸

ARCHIVE POLICY
Personal 1 year move to archive (1 Year)
Personal 5 year move to archive (5 Years)
Personal never move to archive (Never)
Use Parent Folder Policy

RETENTION POLICY
1 Week Delete (7 Days)
1 Month Delete (1 month)
6 Month Delete (6 months)
1 Year Delete (1 Year)
5 Year Delete (5 Years)
Never Delete (Never)
Use Parent Folder Policy

OWA 2013

Users can apply personal tags to folders they create or to individual items. Messages that have a personal tag applied are always processed based on the personal tag's settings. Users can apply a personal tag to a message so that it's moved or deleted sooner or later than the settings specified in the DPT or RPTs applied to that user's mailbox. You can also create personal tags with retention disabled. This allows users to tag items so they're never moved to an archive or never expire.

> **NOTE**
>
> Users can apply archive policies to default folders, user-created folders or subfolders, and individual items. Users can apply a retention policy to user-created folders or subfolders and individual items (including subfolders and items in a default folder), but not to default folders.

Users can also use the Exchange admin center (EAC) to select additional personal tags that aren't linked to their retention policy. The selected tags then become available in Outlook 2010 and Outlook on the web. To enable users to select additional tags from the EAC, you must add the MyRetentionPolicies Role to the user's role assignment policy. To learn more about role assignment policies for users, see Role assignment policies in Exchange Online. If you allow users to select additional personal tags, all personal tags in your Exchange organization become available to them.

> **NOTE**
>
> Personal tags are a premium feature. Mailboxes with policies that contain these tags (or as a result of users adding the tags to their mailbox) require an Exchange Enterprise client access license (CAL).

Retention age

When you enable a retention tag, you must specify a retention age for the tag. This age indicates the number of days to retain a message after it arrives in the user's mailbox.

The retention age for non-recurring items (such as email messages) is calculated differently than items that have an end date or recurring items (such as meetings and tasks). To learn how retention age is calculated for different types of items, see How retention age is calculated.

You can also create retention tags with retention disabled or disable tags after they're created. Because messages that have a disabled tag applied aren't processed, no retention action is taken. As a result, users can use a disabled personal tag as a **Never Move** tag or a **Never Delete** tag to override a DPT or RPT that would otherwise apply to the message.

Retention actions

When creating or configuring a retention tag, you can select one of the following retention actions to be taken when an item reaches its retention age:

RETENTION ACTION	ACTION TAKEN...	EXCEPT...
Move to Archive[1]	Moves the message to the user's archive mailbox Only available for DPTs and personal tags For details about archiving, see In-Place Archiving	If the user doesn't have an archive mailbox, no action is taken.
Delete and Allow Recovery	Emulates the behavior when the user empties the Deleted Items folder. Items are moved to the Recoverable Items folder in Exchange Online in the mailbox and preserved until the deleted item retention period. Provides the user a second chance to recover the item using the **Recover Deleted Items** dialog box in Outlook or Outlook on the web	If you've set the deleted item retention period to zero days, items are permanently deleted. For details, see Change how long permanently deleted items are kept for an Exchange Online mailbox.
Permanently Delete	Permanently deletes messages. You can't recover messages after they're permanently deleted.	If mailbox is placed on In-Place Hold and Litigation Hold or Litigation Hold, items are preserved in the Recoverable Items folder based on hold parameters. In-Place eDiscovery will still return these items in search results.
Mark as Past Retention Limit	Marks a message as expired. In Outlook 2010 or later, and Outlook on the web, expired items are displayed with the notification stating 'This item has expired' and 'This item will expire in 0 days'. In Outlook 2007, items marked as expired are displayed by using strikethrough text.	N. A.

> **NOTE**
>
> [1] In an Exchange hybrid deployment, you can enable a cloud-based archive mailbox for an on-premises primary mailbox. If you assign an archive policy to an on-premises mailbox, items are moved to the cloud-based archive. If an item is moved to the archive mailbox, a copy of it isn't retained in the on-premises mailbox. If the on-premises mailbox is placed on hold, an archive policy will still move items to the cloud-based archive mailbox where they are preserved for the duration specified by the hold.

For details about how to create retention tags, see Create a Retention Policy.

Retention policies

To apply one or more retention tags to a mailbox, you must add them to a retention policy and then apply the policy to mailboxes. A mailbox can't have more than one retention policy. Retention tags can be linked to or unlinked from a retention policy at any time, and the changes automatically take effect for all mailboxes that have the policy applied.

A retention policy can have the following retention tags:

RETENTION TAG TYPE	TAGS IN A POLICY
Default policy tag (DPT)	One DPT with the **Move to Archive** action One DPT with the **Delete and Allow Recovery** or **Permanently Delete** actions One DPT for voice mail messages with the **Delete and Allow Recovery** or **Permanently Delete** action
Retention policy tags (RPTs)	One RPT for each supported default folder > **Note**: You can't link more than one RPT for a particular default folder (such as **Deleted Items**) to the same retention policy.
Personal tags	Any number of personal tags > **Tip**: **Many personal tags in a policy can confuse users. We recommend adding no more than 10 personal tags to a retention policy.

> **NOTE**
>
> Although a retention policy doesn't need to have any retention tags linked to it, we don't recommend using this scenario. If mailboxes with retention policies don't have retention tags linked to them, this may cause mailbox items to never expire.

A retention policy can contain both archive tags (tags that move items to the personal archive mailbox) and deletion tags (tags that delete items). A mailbox item can also have both types of tags applied. Archive mailboxes don't have a separate retention policy. The same retention policy is applied to the primary and archive mailbox.

When planning to create retention policies, you must consider whether they'll include both archive and deletion tags. As mentioned earlier, a retention policy can have one DPT that uses the **Move to Archive** action and one DPT that uses either the **Delete and Allow Recovery** or **Permanently Delete** action. The DPT with the **Move to Archive** action must have a lower retention age than the DPT with a deletion action. For example, you can use a DPT with the **Move to Archive** action to move items to the archive mailbox in two years, and a DPT with a deletion action to remove items from the mailbox in seven years. Items in both primary and archive mailboxes will be deleted after seven years.

For a list of management tasks related to retention policies, see Messaging Records Management Procedures.

Default retention policy

Exchange Setup creates the retention policy **Default MRM Policy**. The Default MRM Policy is applied automatically to new mailboxes in Exchange Online. In Exchange Server, the policy is applied automatically if you create an archive for the new user and don't specify a retention policy

You can modify tags included in the Default MRM Policy, for example by changing the retention age or retention action, disable a tag or modify the policy by adding or removing tags from it. The updated policy is applied to mailboxes the next time they're processed by the Managed Folder Assistant.

For more details, including a list of retention tags linked to the policy, see Default Retention Policy in Exchange

Managed Folder Assistant

The Managed Folder Assistant, a mailbox assistant that runs on Mailbox servers, processes mailboxes that have a retention policy applied.

The Managed Folder Assistant applies the retention policy by inspecting items in the mailbox and determining whether they're subject to retention. It then stamps items subject to retention with the appropriate retention tags and takes the specified retention action on items past their retention age.

The Managed Folder Assistant is a throttle-based assistant. Throttle-based assistants are always running and don't need to be scheduled. The system resources they can consume are throttled. You can configure the Managed Folder Assistant to process all mailboxes on a Mailbox server within a certain period (known as a work cycle). Additionally, at a specified interval (known as the work cycle checkpoint), the assistant refreshes the list of mailboxes to be processed. During the refresh, the assistant adds newly created or moved mailboxes to the queue. It also reprioritizes existing mailboxes that haven't been processed successfully due to failures and moves them higher in the queue so they can be processed during the same work cycle.

You can also use the Start-ManagedFolderAssistant cmdlet to manually trigger the assistant to process a specified mailbox.

> **NOTE**
>
> The Managed Folder Assistant doesn't take any action on messages that aren't subject to retention, specified by disabling the retention tag. You can also disable a retention tag to temporarily suspend items with that tag from being processed.
>
> MRM won't move items larger than the values of MaxSendSize and MaxReceiveSize set on the mailbox.

Moving items between folders

A mailbox item moved from one folder to another inherits any tags applied to the folder to which it's moved. If an item is moved to a folder that doesn't have a tag assigned, the DPT is applied to it. If the item has a tag explicitly assigned to it, the tag always takes precedence over any folder-level tags or the default tag.

Applying a retention tag to a folder in the archive

When the user applies a personal tag to a folder in the archive, if a folder with the same name exists in the primary mailbox and has a different tag, the tag on that folder in the archive changes to match the one in the primary mailbox. This is by design to avoid any confusion about items in a folder in the archive having a different expiry behavior than the same folder in the user's primary mailbox. For example, the user has a folder named Project Contoso in the primary mailbox with a Delete - 3 years tag and a Project Contoso folder also exists in the archive mailbox. If the user applies a Delete - 1 year personal tag to delete items in the folder after 1 year. When the mailbox is processed again, the folder reverts to the Delete - 3 Years tag.

Removing or deleting a retention tag from a retention policy

When a retention tag is removed from the retention policy applied to a mailbox, the tag is no longer available to the user and can't be applied to items in the mailbox.

Existing items that have been stamped with that tag continue to be processed by the Managed Folder Assistant based on those settings and any retention action specified in the tag is applied to those messages.

However, if you delete the tag, the tag definition stored in Active Directory is removed. This causes the Managed Folder Assistant to process all items in a mailbox and restamp the ones that have the removed tag applied. Depending on the number of mailboxes and messages, this process may significantly consume resources on all Mailbox servers that contain mailboxes with retention policies that include the removed tag.

Disabling a retention tag

If you disable a retention tag, the Managed Folder Assistant ignores items that have that tag applied. Items that have a retention tag for which retention is disabled are either never moved or never deleted, depending on the specified retention action. Because these items are still considered tagged items, the DPT doesn't apply to them. For example, if you want to troubleshoot retention tag settings, you can temporarily disable a retention tag to stop the Managed Folder Assistant from processing messages with that tag.

NOTE

The retention period for a disabled retention tag is displayed to the user as **Never**. If a user tags an item believing it will never be deleted, enabling the tag later may result in unintentional deletion of items the user didn't want to delete. The same is true for tags with the **Move to Archive** action.

Retention hold

When users are temporarily away from work and don't have access to their e-mail, retention settings can be applied to new messages before they return to work or access their e-mail. Depending on the retention policy, messages may be deleted or moved to the user's personal archive. You can temporarily suspend retention policies from processing a mailbox for a specified period by placing the mailbox on retention hold. When you place a mailbox on retention hold, you can also specify a retention comment that informs the mailbox user (or another user authorized to access the mailbox) about the retention hold, including when the hold is scheduled to begin and end. Retention comments are displayed in supported Outlook clients. You can also localize the retention hold comment in the user's preferred language.

NOTE

Placing a mailbox on retention hold doesn't affect how mailbox storage quotas are processed. Depending on the mailbox usage and applicable mailbox quotas, consider temporarily increasing the mailbox storage quota for users when they're on vacation or don't have access to e-mail for an extended period. For more information about mailbox storage quotas, see Mailbox storage limits.

During long absences from work, users may accrue a large amount of e-mail. Depending on the volume of e-mail and the length of absence, it may take these users several weeks to sort through their messages. In these cases, consider the additional time it may take the users to catch up on their mail before removing them from retention hold.

If your organization has never implemented MRM, and your users aren't familiar with its features, you can also use retention holds during the initial warm up and training phase of your MRM deployment. You can create and deploy retention policies and educate users about the policies without the risk of having items moved or deleted before users can tag them. A few days before the warm up and training period ends, you should remind users of the warm-up deadline. After the deadline, you can remove the retention hold from user mailboxes, allowing the Managed Folder Assistant to process mailbox items and take the specified retention action.

For details about how to place a mailbox on retention hold, see Place a mailbox on retention hold.

Default Retention Policy in Exchange Online and Exchange Server

8/10/2020 • 2 minutes to read • Edit Online

Exchange creates the retention policy Default MRM Policy in your Exchange Online and on-premises Exchange organization. The policy is automatically applied to new users in Exchange Online. In on-premises organizations, the policy is applied when you create an archive for the mailbox. You can change the retention policy applied to a user at any time.

You can modify tags included in the Default MRM Policy, for example by changing the retention age or retention actions, disable a tag, or modify the policy by adding or removing tags from it. The updated policy is applied to mailboxes the next time they're processed by the Managed Folder Assistant

Retention tags linked to the Default MRM Policy

The following table lists the default retention tags linked to the Default MRM Policy.

NAME	TYPE	RETENTION AGE (DAYS)	RETENTION ACTION
Default 2 years move to archive	Default Policy Tag (DPT)	730	Move to Archive
Recoverable Items 14 days move to archive	Recoverable Items folder	14	Move to Archive
Personal 1 year move to archive	Personal tag	365	Move to Archive
Personal 5 year move to archive	Personal tag	1,825	Move to Archive
Personal never move to archive	Personal tag	Not applicable	Move to Archive
1 Week Delete	Personal tag	7	Delete and Allow Recovery
1 Month Delete	Personal tag	30	Delete and Allow Recovery
6 Month Delete	Personal tag	180	Delete and Allow Recovery
1 Year Delete	Personal tag	365	Delete and Allow Recovery
5 Year Delete	Personal tag	1,825	Delete and Allow Recovery
Never Delete	Personal tag	Not applicable	Delete and Allow Recovery

What you can do with the Default MRM Policy

YOU CAN…	IN EXCHANGE ONLINE…	IN EXCHANGE SERVER…
Apply the Default MRM Policy automatically to new users	Yes, applied by default. No action is required.	Yes, applied by default if you also create an archive for the new user. If you create an archive for the user later, the policy is applied automatically only if the user doesn't have an existing Retention Policy.
Modify the retention age or retention action of a retention tag linked to the policy	Yes	Yes
Disable a retention tag linked to the policy	Yes	Yes
Add a retention tag to the policy	Yes	Yes
Remove a retention tag from the policy	Yes	Yes
Set another policy as the default retention policy to be applied automatically to new users	No	No

More information

- A Retention Tag can be linked to more than one Retention Policy. For details about managing Retention tags and retention policies, see Messaging Records Management Procedures.

- The Default MRM Policy doesn't include a DPT to automatically delete items (but it does contain personal tags with the delete retention action that users can apply to mailbox items). If you want to automatically delete items after a specified period, you can create a DPT with the required delete action and add it to the policy. For details, see Create a Retention Policy and Add retention tags to or remove retention tags from a retention policy.

- Retention policies are applied to mailbox users. The same policy applies to the user's mailbox and archive.

Default folders that support Retention Policy Tags

8/10/2020 • 4 minutes to read • Edit Online

You can use Retention tags and retention policies to manage email lifecycle. Retention Policies contain Retention Tags, which are settings you can use to specify when a message should be automatically moved to the archive or when it should be deleted.

A Retention Policy Tag (RPT) is a type of retention tag that you can apply to default folders in a mailbox, such as **Inbox** and **Deleted Items**.

Supported default folders

You can create RPTs for the default folders shown in the following table.

FOLDER NAME	DETAILS

FOLDER NAME	DETAILS
Archive	This folder is the default destination for messages archived with the Archive button in Outlook. The Archive feature provides a fast way for users to remove messages from their Inbox without deleting them. This RPT is available only in Exchange Online.
Calendar	This default folder is used to store meetings and appointments.
Clutter	This folder contains email messages that are low priority. Clutter looks at what you've done in the past to determine the messages you're most likely to ignore. It then moves those messages to the **Clutter** folder.
Conversation History	This folder is created by Microsoft Lync (previously Microsoft Office Communicator). Although not treated as a default folder by Outlook, it's treated as a special folder by Exchange and can have RPTs applied.
Deleted Items	This default folder is used to store items deleted from other folders in the mailbox. Outlook and Outlook on the web (formerly known as Outlook Web App) users can manually empty this folder. Users can also configure Outlook to empty the folder upon closing Outlook.
Drafts	This default folder is used to store draft messages that haven't been sent by the user. Outlook on the web also uses this folder to save messages that were sent by the user but not submitted to the Hub Transport server.
Inbox	This default folder is used to store messages delivered to a mailbox.
Journal	This default folder contains actions selected by the user. These actions are automatically recorded by Outlook and placed in a timeline view.
Junk E-mail	This default folder is used to save messages marked as junk e-mail by the content filter on an Exchange server or by the anti-spam filter in Outlook.
Notes	This folder contains notes created by users in Outlook. These notes are also visible in Outlook on the web.
Outbox	This default folder is used to temporarily store messages sent by the user until they're submitted to a Hub Transport server. A copy of sent messages is saved in the Sent Items default folder. Because messages usually remain in this folder for a brief period, it isn't necessary to create an RPT for this folder.
RSS Feeds	This default folder contains RSS feeds.

FOLDER NAME	DETAILS
Recoverable Items	This is a hidden folder in the Non-IPM sub-tree. It contains the Deletions, Versions, Purges, DiscoveryHolds, and Audits sub-folders. Retention tags for this folder move items from the Recoverable Items folder in the user's primary mailbox to the Recoverable Items folder in the user's archive mailbox. You can assign only the **Move To Archive** retention action to tags for this folder. To learn more, see Recoverable Items folder in Exchange Online.
Sent Items	This default folder is used to store messages that have been submitted to a Hub Transport server.
Sync Issues	This folder contains synchronization logs.
Tasks	This default folder is used to store tasks. To create an RPT for the Tasks folder, you have to use Exchange Online PowerShell. For more information, see New-RetentionPolicyTag. After the RPT for the Tasks folder is created, you can manage it by using the Exchange admin center.

More Info

- RPTs are retention tags for default folders. You can only select a delete action for RPTs - either **delete and allow recovery** or **permanently delete**.

- You can't create an RPT to move messages to the archive. To move old items to archive, you can create a Default Policy Tag (DPT), which applies to the entire mailbox, or Personal Tags, which are displayed in Outlook and Outlook on the web as Archive Policies. Your users can apply them to folders or individual messages.

- You can't apply RPTs to the Contacts folder.

- You can only add one RPT for a particular default folder to a Retention Policy. For example, if a retention policy has an Inbox tag, you can't add another RPT of type Inbox to that retention policy.

- To learn how to create RPTs or other types of retention tags and add them to a retention policy, see Create a Retention Policy.

- In Exchange Server and Exchange Online, a DPT also applies to the **Calendar** and **Tasks** default folders. This may result in items being deleted or moved to the archive based on the DPT settings. To prevent the DPT settings from deleting items in these folders , create RPTs with retention disabled. To prevent the DPT settings from moving items in a default folder, you can create a disabled Personal Tag with the move to archive action, add it to the retention policy, and then have users apply it to the default folder. For details, see Prevent archiving of items in a default folder in Exchange 2010.

How retention age is calculated

The Managed Folder Assistant (MFA) is one of many mailbox assistant processes that runs in Exchange Online. Its job is to process mailboxes that have a Retention Policy applied, add the Retention Tags included in the policy to the mailbox, and process items in the mailbox. If the items have a retention tag, the assistant tests the age of those items. If an item has exceeded its retention age, it takes the specified retention action. Retention actions include moving an item to the user's archive, deleting the item and allowing recovery, or deleting the item permanently.

See Retention tags and retention policies for more information.

Determining the age of different types of items

The retention age of mailbox items is calculated from the date of delivery or in the case of items like drafts that aren't delivered but created by the user, the date an item was created. When the Managed Folder Assistant processes items in a mailbox, it stamps a start date and an expiration date for all items that have retention tags with the **Delete and Allow Recovery** or **Permanently Delete** retention action. Items that have an archive tag are also stamped with a move date.

Items in the Deleted Items folder and items which may have a start and end date, such as calendar items (meetings and appointments) and tasks, are handled differently as shown in this table.

IF THE ITEM TYPE IS...	AND THE ITEM IS...	THE RETENTION AGE IS CALCULATED BASED ON...
Email message Document Fax Journal item Meeting request, response, or cancellation Missed call Notes	Not in the Deleted Items folder	Delivery date or date of creation
Email message Document Fax Journal item Meeting request, response, or cancellation Missed call Notes	In the Deleted Items folder	Date of delivery or creation unless the item was deleted from a folder that does not have an inherited or implicit retention tag. If an item is in a folder that doesn't have an inherited or implicit retention tag applied, the item isn't processed by the MFA and therefore doesn't have a start date stamped by it. When the user deletes such an item, and the MFA processes it for the first time in the Deleted Items folder, it stamps the current date as the start date.

IF THE ITEM TYPE IS...	AND THE ITEM IS...	THE RETENTION AGE IS CALCULATED BASED ON...
Calendar	Not in the Deleted Items folder	Non-recurring calendar items expire according to their end date. Recurring calendar items expire according to the end date of their last occurrence. Recurring calendar items with no end date don't expire.
Calendar	In the Deleted Items folder	A calendar item expires according to its message-received date, if one exists. If a calendar item doesn't have a message-received date, it expires according to its message-creation date. If a calendar item has neither a message-received date nor a message-creation date, it doesn't expire.
Task	Not in the Deleted Items folder	Non-recurring tasks: A non-recurring task expires according to its `message-received date`, if one exists. If a non-recurring task doesn't have a `message-received date`, it expires according to its `message-creation date`. If a non-recurring task has neither a `message-received date` nor a `message-creation date`, it doesn't expire. A recurring task expires according to the `end date` of its last occurrence. If a recurring task doesn't have an `end date`, it doesn't expire. A regenerating task (which is a recurring task that regenerates a specified time after the preceding instance of the task is completed) doesn't expire.
Task	In the Deleted Items folder	A task expires according to its message-received date, if one exists. If a task doesn't have a message-received date, it expires according to its message-creation date. If a task has neither a message-received date nor a message-creation date, it doesn't expire.
Contact	In any folder	Contacts aren't stamped with a start date or an expiration date, so they're skipped by the Managed Folder Assistant and don't expire.
Corrupted	In any folder	Corrupted items are skipped by the Managed Folder Assistant and don't expire.

Examples

IF THE USER...	THE RETENTION TAGS ON FOLDER...	THE MANAGED FOLDER ASSISTANT...
Receives a message in the Inbox on 01/26/2019. Deletes the message on 2/27/2019.	Inbox: Delete in 365 days Deleted Items: Delete in 30 days	Processes the message in the Inbox on 1/26/2019; stamps it with a start date of 01/26/2019 and an expiration date of 01/26/2020. Processes the message again in the Deleted Items folder on 2/27/2019. It recalculates the expiration date based on the same start date (01/26/2019). Because the item is older than 30 days, it is expired immediately.
Receives a message in the Inbox on 01/26/2019. Deletes the message on 2/27/2019.	Inbox: None (inherited or implicit) Deleted Items: Delete in 30 days	Processes the message in the Deleted Items folder on 02/27/2019 and determines the item doesn't have a start date. It stamps the current date as the start date, and 03/27/2019 as the expiration date. The item is expired on 3/27/2019, which is 30 days after the user deleted or moved it to the Deleted Items folder.

More Info

- In Exchange Online, the Managed Folder Assistant processes a mailbox once in seven days. This might result in items being expired up to seven days after the expiration date stamped on the item.

- Items in mailboxes placed on Retention Hold aren't processed by the Managed Folder Assistant until the Retention Hold is removed.

- If a mailbox is placed on In-Place Hold or Litigation Hold, expiring items are removed from the Inbox but preserved in the Recoverable Items folder until the mailbox is removed from In-Place Hold and Litigation Hold.

- In hybrid deployments, the same retention tags and retention policies must exist in your on-premises and Exchange Online organizations in order to consistently move and expire items across both organizations. See Export and Import Retention Tags for more information.

Create a Retention Policy

8/10/2020 • 6 minutes to read • Edit Online

In Exchange Online, you can use retention policies to manage email lifecycle. Retention policies are applied by creating retention tags, adding them to a retention policy, and applying the policy to mailbox users.

Here's a video that shows you how to create a retention policy and apply it to a mailbox in Exchange Online.

For additional management tasks related to retention policies, see Messaging Records Management Procedures.

What do you need to know before you begin?

- Estimated time to complete this task: 30 minutes.

- Procedures in this topic require specific permissions. See each procedure for its permissions information.

- Mailboxes to which you apply retention policies must reside on Exchange Server 2010 or later servers.

- For information about keyboard shortcuts that may apply to the procedures in this topic, see Keyboard shortcuts for the Exchange admin center.

Step 1: Create a retention tag

You need to be assigned permissions before you can perform this procedure or procedures. To see what permissions you need, see the "Messaging records management" entry in the Feature permissions in Exchange Online topic.

Use the EAC to create a retention tag

1. Navigate to **Compliance management** > **Retention tags**, and then click **Add ✚**

2. Select one of the following options:

   - **Applied automatically to entire mailbox (default)**: Select this option to create a default policy tag (DPT). You can use DPTs to create a default deletion policy and a default archive policy, which applies to all items in the mailbox.

     > **NOTE**
     >
     > You can't use the EAC to create a DPT to delete voice mail items. For details about how to create a DPT to delete voice mail items, see Exchange Online PowerShell example below.

   - **Applied automatically to a specific folder**: Select this option to create a retention policy tag (RPT) for a default folder such as **Inbox** or **Deleted Items**.

     > **NOTE**
     >
     > You can only create RPTs with the **Delete and allow recovery** or **Permanently delete** actions.

   - **Applied by users to items and folders (Personal)**: Select this option to create personal tags. These tags allow Outlook and Outlook on the web (formerly known as Outlook Web App) users to apply archive or deletion settings to a message or folders that are different from the settings applied to the parent folder or the entire mailbox.

3. The **New retention tag** page title and options will vary depending on the type of tag you selected. Complete the following fields:

- **Name**: Enter a name for the retention tag. The tag name is for display purposes and doesn't have any impact on the folder or item a tag is applied to. Consider that the personal tags you provision for users are available in Outlook and Outlook on the web.

- **Apply this tag to the following default folder**: This option is available only if you selected **Applied automatically to a specific folder**.

- **Retention action**: Select one of the following actions to be taken after the item reaches its retention period:

- **Delete and Allow Recovery**: Select this action to delete items but allow users to recover them using the **Recover Deleted Items** option in Outlook or Outlook on the web. Items are retained until the deleted item retention period configured for the mailbox database or the mailbox user is reached.

- **Permanently Delete**: Select this option to permanently delete the item from the mailbox database.

> **IMPORTANT**
>
> Mailboxes or items subject to In-Place Hold or litigation hold will be retained and returned in In-Place eDiscovery searches. To learn more, see In-Place Hold and Litigation Hold.

- **Move to Archive**: This action is available only if you're creating a DPT or a personal tag. Select this action to move items to the user's In-Place Archive.

- **Retention period**: Select one of the following options:

- **Never**: Select this option to specify that items should never be deleted or moved to the archive.

- **When the item reaches the following age (in days)**: Select this option and specify the number of days to retain items before they're moved or deleted. The retention age for all supported items except Calendar and Tasks is calculated from the date an item is received or created. Retention age for Calendar and Tasks items is calculated from the end date.

- **Comment**: User this optional field to enter any administrative notes or comments. The field isn't displayed to users.

Use Exchange Online PowerShell to create a retention tag

Use the **New-RetentionPolicyTag** cmdlet to create a retention tag. Different options available in the cmdlet allow you to create different types of retention tags. Use the *Type* parameter to create a DPT (`All`), RPT (specify a default folder type, such as `Inbox`) or a personal tag (`Personal`).

This example creates a DPT to delete all messages in the mailbox after 7 years (2,556 days).

```
New-RetentionPolicyTag -Name "DPT-Corp-Delete" -Type All -AgeLimitForRetention 2556 -RetentionAction
DeleteAndAllowRecovery
```

This example creates a DPT to move all messages to the In-Place Archive in 2 years (730 days).

```
New-RetentionPolicyTag -Name "DPT-Corp-Move" -Type All -AgeLimitForRetention 730 -RetentionAction
MoveToArchive
```

This example creates a DPT to delete voice mail messages after 20 days.

```
New-RetentionPolicyTag -Name "DPT-Corp-Voicemail" -Type All -MessageClass Voicemail -AgeLimitForRetention 20 -
RetentionAction DeleteAndAllowRecovery
```

This example creates a RPT to permanently delete messages in the Junk EMail folder after 30 days.

```
New-RetentionPolicyTag -Name "RPT-Corp-JunkMail" -Type JunkEmail -AgeLimitForRetention 30 -RetentionAction
PermanentlyDelete
```

This example creates a personal tag to never delete a message.

```
New-RetentionPolicyTag -Name "Never Delete" -Type Personal -RetentionAction DeleteAndAllowRecovery -
RetentionEnabled $false
```

Step 2: Create a retention policy

You need to be assigned permissions before you can perform this procedure or procedures. To see what permissions you need, see the "Messaging records management" entry in the Feature permissions in Exchange Online topic.

Use the EAC to create a retention policy

1. Navigate to **Compliance management** > **Retention policies**, and then click **Add +**

2. In **New Retention Policy**, complete the following fields:

   - **Name**: Enter a name for the retention policy.

   - **Retention tags**: Click **Add +** to select the tags you want to add to this retention policy.

     A retention policy can contain the following tags:

     - One DPT with the **Move to Archive** action.

     - One DPT with the **Delete and Allow Recovery** or **Permanently Delete** actions.

     - One DPT for voice mail messages with the **Delete and Allow Recovery** or **Permanently Delete** actions.

     - One RPT per default folder such as **Inbox** to delete items.

     - Any number of personal tags.

     > **NOTE**
     >
     > Although you can add any number of personal tags to a retention policy, having many personal tags with different retention settings can confuse users. We recommend linking no more than ten personal tags to a retention policy.

You can create a retention policy without adding any retention tags to it, but items in the mailbox to which the policy is applied won't be moved or deleted. You can also add and remove retention tags from a retention policy after it's created.

Use Exchange Online PowerShell to create a retention policy

This example creates the retention policy RetentionPolicy-Corp and uses the *RetentionPolicyTagLinks* parameter to associate five tags to the policy.

```
New-RetentionPolicy "RetentionPolicy-Corp"  -RetentionPolicyTagLinks "DPT-Corp-Delete","DPT-Corp-Move","DPT-
Corp-Voicemail","RPT-Corp-JunkMail","Never Delete"
```

For detailed syntax and parameter information, see New-RetentionPolicy.

Step 3: Apply a retention policy to mailbox users

After you create a retention policy, you must apply it to mailbox users. You can apply different retention policies to different set of users. For detailed instructions, see Apply a retention policy to mailboxes.

How do you know this worked?

After you create retention tags, add them to a retention policy, and apply the policy to a mailbox user, the next time the MRM mailbox assistant processes the mailbox, messages are moved or deleted based on settings you configured in the retention tags.

To verify that you have applied the retention policy, do the following:

1. Replace <Mailbox Identity> with the name, email address, or alias of the mailbox, and run the following command in Exchange Online PowerShell command to run the MRM assistant manually against a single mailbox:

```
Start-ManagedFolderAssistant -Identity "<Mailbox Identity>"
```

2. Log on to the mailbox using Outlook or Outlook on the web and verify that messages are deleted or moved to an archive in accordance with the policy configuration.

> **TIP**
> Having problems? Ask for help in the Exchange forums. Visit the forums at Exchange Online or Exchange Online Protection.

Add retention tags to or remove retention tags from a retention policy

You can add retention tags to a retention policy when the policy is created or any time thereafter. For details about how to create a retention policy, including how to simultaneously add retention tags, see Create a Retention Policy.

A retention policy can contain the following retention tags:

- One or more retention policy tags (RPTs) for supported default folders

- One default policy tag (DPT) with the **Move to Archive** action

- One DPT with the **Delete and Allow Recovery** or the **Permanently Delete** action

- One DPT for voice mail

- Any number of personal tags

For more information about retention tags, see Retention tags and retention policies.

What do you need to know before you begin?

- Estimated time to completion: 10 minutes.

- You need to be assigned permissions before you can perform this procedure or procedures. To see what permissions you need, see the "Messaging records management" entry in the Feature permissions in Exchange Online topic.

- Retention tags aren't applied to a mailbox until they're linked to a retention policy and the Managed Folder Assistant processes the mailbox. Use the Start-ManagedFolderAssistant cmdlet to manually trigger the assistant to process a specified mailbox.

- For information about keyboard shortcuts that may apply to the procedures in this topic, see Keyboard shortcuts for the Exchange admin center.

> **TIP**
>
> Having problems? Ask for help in the Exchange forums. Visit the forums at Exchange Online or Exchange Online Protection.

Use the EAC to add or remove retention tags

1. Go to **Compliance management** > **Retention policies**.

2. In the list view, select the retention policy to which you want to add retention tags and then click **Edit** ✏.

3. In **Retention Policy**, use the following settings:

   - **Add ✚** Click this button to add a retention tag to the policy.

   - **Remove ➖** Select a tag from the list, and then click this button to remove the tag from the policy.

Use Exchange Online PowerShell to add or remove retention tags

This example adds the retention tags VPs-Default, VPs-Inbox, and VPs-DeletedItems to the retention policy RetPolicy-VPs, which doesn't already have retention tags linked to it.

Caution

If the policy has retention tags linked to it, this command replaces the existing tags.

```
Set-RetentionPolicy -Identity "RetPolicy-VPs" -RetentionPolicyTagLinks "VPs-Default","VPs-Inbox","VPs-DeletedItems"
```

This example adds the retention tag VPs-DeletedItems to the retention policy RetPolicy-VPs, which already has other retention tags linked to it.

```
$TagList = (Get-RetentionPolicy "RetPolicy-VPs").RetentionPolicyTagLinks
$TagList.Add((Get-RetentionPolicyTag 'VPs-DeletedItems').DistinguishedName)
Set-RetentionPolicy "RetPolicy-VPs" -RetentionPolicyTagLinks $TagList
```

This example removes the retention tag VPs-Inbox from the retention policy RetPolicy-VPs.

```
$TagList = (Get-RetentionPolicy "RetPolicy-VPs").RetentionPolicyTagLinks
$TagList.Remove((Get-RetentionPolicyTag 'VPs-Inbox').DistinguishedName)
Set-RetentionPolicy "RetPolicy-VPs" -RetentionPolicyTagLinks $TagList
```

For detailed syntax and parameter information, see set-RetentionPolicy and get-RetentionPolicy.

How do you know this worked?

To verify that you have successfully added or removed a retention tag from a retention policy, use the get-RetentionPolicy cmdlet to verify the *RetentionPolicyTagLinks* property.

This example use the **Get-RetentionPolicy** cmdlet to retrieve retention tags added to the Default MRM Policy and pipes them to the **Format-Table** cmdlet to output only the name property of each tag.

```
(Get-RetentionPolicy "Default MRM Policy").RetentionPolicyTagLinks | Format-Table name
```

Apply a retention policy to mailboxes

8/10/2020 • 2 minutes to read • Edit Online

You can use retention policies to group one or more retention tags and apply them to mailboxes to enforce message retention settings. A mailbox can't have more than one retention policy.

Caution

Messages are expired based on settings defined in the retention tags linked to the policy. These settings include actions such moving messages to the archive or permanently deleting them. Before applying a retention policy to one or more mailboxes, we recommended that you test the policy and inspect each retention tag associated with it.

For additional management tasks related to messaging records management (MRM), see Messaging Records Management Procedures.

What do you need to know before you begin?

- Estimated time to complete: 5 minutes.

- You need to be assigned permissions before you can perform this procedure or procedures. To see what permissions you need, see the "Retention policies" entry in the Feature permissions in Exchange Online topic.

- For information about keyboard shortcuts that may apply to the procedures in this topic, see Keyboard shortcuts for the Exchange admin center.

> **TIP**
>
> Having problems? Ask for help in the Exchange forums. Visit the forums at Exchange Online or Exchange Online Protection.

Use the EAC to apply a retention policy to a single mailbox

1. Navigate to **Recipients** > **Mailboxes**.

2. In the list view, select the mailbox to which you want to apply the retention policy, and then click **Edit** ✏.

3. In **User Mailbox**, click **Mailbox features**.

4. In the **Retention policy** list, select the policy you want to apply to the mailbox, and then click **Save**.

Use the EAC to apply a retention policy to multiple mailboxes

1. Navigate to **Recipients** > **Mailboxes**.

2. In the list view, use the Shift or Ctrl keys to select multiple mailboxes.

3. In the details pane, click **More options**.

4. Under **Retention Policy**, click **Update**.

5. In **Bulk Assign Retention Policy**, select the retention policy you want to apply to the mailboxes, and then click **Save**.

Use Exchange Online PowerShell to apply a retention policy to a single

mailbox

This example applies the retention policy RP-Finance to Morris's mailbox.

```
Set-Mailbox "Morris" -RetentionPolicy "RP-Finance"
```

For detailed syntax and parameter information, see Set-Mailbox.

Use Exchange Online PowerShell to apply a retention policy to multiple mailboxes

This example applies the new retention policy New-Retention-Policy to all mailboxes that have the old policy Old-Retention-Policy.

```
$OldPolicy=(Get-RetentionPolicy "Old-Retention-Policy").distinguishedName
Get-Mailbox -Filter "RetentionPolicy -eq '$OldPolicy'" -Resultsize Unlimited | Set-Mailbox -RetentionPolicy
"New-Retention-Policy"
```

This example applies the retention policy RetentionPolicy-Corp to all mailboxes in the Exchange organization.

```
Get-Mailbox -ResultSize unlimited | Set-Mailbox -RetentionPolicy "RetentionPolicy-Corp"
```

This example applies the retention policy RetentionPolicy-Finance to all mailboxes in the Finance organizational unit.

```
Get-Mailbox -OrganizationalUnit "Finance" -ResultSize Unlimited | Set-Mailbox -RetentionPolicy
"RetentionPolicy-Finance"
```

For detailed syntax and parameter information, see Get-Mailbox and Set-Mailbox.

How do you know this worked?

To verify that you have applied the retention policy, run the Get-Mailbox cmdlet to retrieve the retention policy for the mailbox or mailboxes.

This example retrieves the retention policy for Morris's mailbox.

```
Get-Mailbox Morris | Select RetentionPolicy
```

This command retrieves all mailboxes that have the retention policy RP-Finance applied.

```
Get-Mailbox -ResultSize unlimited | Where-Object {$_.RetentionPolicy -eq "RP-Finance"} | Format-Table
Name,RetentionPolicy -Auto
```

Place a mailbox on retention hold

8/10/2020 • 4 minutes to read • Edit Online

Placing a mailbox on retention hold suspends the processing of an MRM retention policy by the Managed Folder Assistant for that mailbox. Retention hold is designed for situations such as a user being on vacation or away temporarily.

During retention hold, users can log on to their mailbox and change or delete items. When you perform a mailbox search, deleted items that are past the deleted item retention period aren't returned in search results. To make sure items changed or deleted by users are preserved in legal hold scenarios, you must place a mailbox on legal hold. For more information, see Create or remove an In-Place Hold.

You can also include retention comments for mailboxes you place on retention hold. The comments are displayed in supported versions of Microsoft Outlook.

For additional management tasks related to messaging records management (MRM), see Messaging Records Management Procedures.

What do you need to know before you begin?

- Estimated time to complete: 1 minute.

- You need to be assigned permissions before you can perform this procedure or procedures. To see what permissions you need, see the "Messaging records management" entry in the Feature permissions in Exchange Online topic.

- You can't use the Exchange admin center (EAC) to place a mailbox on retention hold. You must use Exchange Online PowerShell.

- For information about keyboard shortcuts that may apply to the procedures in this topic, see Keyboard shortcuts for the Exchange admin center.

> **TIP**
>
> Having problems? Ask for help in the Exchange forums. Visit the forums at Exchange Online or Exchange Online Protection.

Use Exchange Online PowerShell to place a mailbox on retention hold

This example places Michael Allen's mailbox on retention hold.

```
Set-Mailbox "Michael Allen" -RetentionHoldEnabled $true
```

For detailed syntax and parameter information, see Set-Mailbox.

Use Exchange Online PowerShell to remove retention hold for a mailbox

This example removes the retention hold from Michael Allen's mailbox.

```
Set-Mailbox "Michael Allen" -RetentionHoldEnabled $false
```

For detailed syntax and parameter information, see Set-Mailbox.

How do you know this worked?

To verify that you have successfully placed a mailbox on retention hold, use the Get-Mailbox cmdlet to retrieve the *RetentionHoldEnabled* property of the mailbox.

This command retrieves the *RetentionHoldEnabled* property for Michael Allen's mailbox.

```
Get-Mailbox "Michael Allen" | Select RetentionHoldEnabled
```

This command retrieves all mailboxes in the Exchange organization, filters the mailboxes that are placed on retention hold, and lists them along with the retention policy applied to each.

> **IMPORTANT**
>
> Because *RetentionHoldEnabled* isn't a filterable property in Exchange Server, you can't use the *Filter* parameter with the **Get-Mailbox** cmdlet to filter mailboxes that are placed on retention hold on the server-side. This command retrieves a list of all mailboxes and filters on the client running Exchange Online PowerShell session. In large environments with thousands of mailboxes, this command may take a long time to complete.

```
Get-Mailbox -ResultSize unlimited | Where-Object {$_.RetentionHoldEnabled -eq $true} | Format-Table
Name,RetentionPolicy,RetentionHoldEnabled -Auto
```

Difference between *ElcProcessingDisabled* and *RetentionHoldEnabled*

ElcProcessingDisabled is another mailbox property that's related to the processing of a mailbox by the Managed Folder Assistant (the default value for this property is **False**). When the *ElcProcessingDisabled* property is set to **True** (by using the `Set-Mailbox -ElcProcessingDisabled $true` command), it prevents the Managed Folder Assistant from processing the mailbox at all. So in addition to not processing the MRM retention policy, other functions performed by the Managed Folder assistant, such as expiring items in the Recoverable Items folder by marking them for permanent removal, won't be performed. For more information, see Set-OrganizationConfig.

In contrast, when *RetentionHoldEnabled* is set to **True**, the Managed Folder Assistant will continue to process the MRM retention policy on the mailbox (including applying retention tags to items), but it will not expire items in folders that are visible to the user (that is, in folders in the IPM subtree of the mailbox). However, the Managed Folder Assistant will continue to process items in the Recoverable Items folder, including purging expired items. So setting *ElcProcessingDisabled* to **True** is more restrictive and has more consequences than setting the *RetentionHoldEnabled* property to **True**.

Another significant difference between these two mailbox properties is that the *ElcProcessingDisabled* property can be set at the organizational level with the `Set-OrganizationConfig -ElcProcessingDisabled $true` command (the default setting is **False**). This means that you could prevent the Managed Folder Assistant from processing all mailboxes in your organization. In contrast, you can only set the *RetentionHoldEnabled* property on a per mailbox basis.

Keep the following things in mind when managing the *ElcProcessingDisabled* property for a mailbox:

- If the *ElcProcessingDisabled* property is set to **False** on a mailbox, but the organizational setting is set to **True**, the organizational setting overrides the mailbox setting and the Managed Folder Assistant won't

process the mailbox.

- If the *ElcProcessingDisabled* property is set to **True** on a mailbox, but the organizational setting is set to **False**, the Managed Folder Assistant won't process the mailbox.

- If an Office 365 or Microsoft 365 retention policy with a Preservation Lock is applied to a mailbox, then the setting of the *ElcProcessingDisabled* property (at both the mailbox and organizational level) will be ignored. In other words, the Managed Folder Assistant can't be disabled for any mailbox that's been assigned a retention policy that's been locked. For more information, see Locking a retention policy.