

# **30 Day Evaluation Guide**

https://campus.barracuda.com/doc/41094266/

This article refers to <u>Barracuda Message Archiver Legacy Release</u> firmware or higher. If you are deploying the virtual appliance, refer to the <u>Barracuda Message Archiver Vx Deployment</u>.

This article assumes you are logged in using the admin role, except where noted.

Use this article as a sample road map for setting up and testing the Barracuda Message Archiver appliance in your organization's environment:



Step 1. Initial Setup and Configuration

If you are deploying a virtual Barracuda Message Archiver, go to the **Barracuda Message Archiver Virtual Deployment** section.

Complete the steps in the <u>Getting Started</u> section; configure <u>manually</u> or <u>using the Setup Wizard</u>.

After you complete your deployment configuration, mail begins forwarding to the Barracuda Message Archiver. Log into the web interface as the administrator, and go to the **BASIC** > **Status** page. Processed mail displays in the **Message Statistics** table.

### **Archived Data Backup**

Once you start storing data, you need to back up the Barracuda Message Archiver data. You can back up your raw email data as well as data directories that house statistics, index, and other metadata snapshots generated by the Barracuda Message Archiver about your content. For

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details, refer to <u>How to Back Up Archives</u>.

## Step 2. Add a User to a User Role

The Barracuda Message Archiver supports four user roles:

- User The user can view and search content associated with their own mailbox and any shared mailboxes.
- **Auditor** The *auditor* can view all items from any user, and can create and activate policies. Note that the auditor role can be restricted to specific domains by the Admin role.
- **IT Admin** The *IT admin* can make system and network configuration changes only.
- **Admin** The *admin* can view all items from any user, create and activate policies, and make system and network changes.

## USE CASE - Add a User in the Auditor Role Including a Saved Search Filter

In this example, the administrator adds Ryan in the auditor role including a Saved Search used to filter his search results for email related to the word "petition" from the domain @corporatenamehere.com. The administrator uses the following steps to add Ryan and set up the Saved Search:

### Step 1: Create a Saved Search

- 1. On the **BASIC** > **Search** page, click **Advanced**. Select **Email** > **Entire Message** > **contains**, and type petition\* as the first set of search criteria.
  - Using the asterisk (\*) wildcard returns the words petition, petitions, petitioned, petitioner, and petitioning.
- Click the + symbol to the left of the search parameter, select Email > Domain > contains, and type @corporatenamehere.com



- 3. Click **Search** to execute the search and verify that the provided search parameters return the expected results.
- 4. Click **Save Search**, enter Petition Audit as the Search Name:

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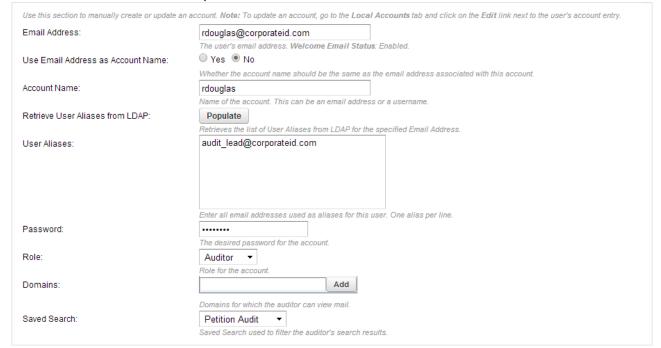




5. Click **OK**; the search is added to the **Saved Searches** page.

### Step 2: Add User

- On the USERS > User Add/Update page, type the user's email address: rdouglas@corporateid.com
- 2. Click **No** for **Use Email Address as Account Name**, and then type rdouglas in the **Account Name** field.
- 3. Click **Populate** to retrieve a list of **User Aliases** from the LDAP server for the entered **Email Address**; Ryan's user aliases populate the table.
- 4. Enter the user's new login password, and select **Auditor** from the **Role** drop-down menu.
- 5. Leave the **Domain** field blank to allow Ryan to access all items from all domains.
- 6. From the Saved Search drop-down menu, select Petition Audit:



7. Click **Save** at the top of the page to add the new user.

Ryan is added as a user with the auditor role in the **Accounts** page, and the Saved Search criteria defined in **Petition Audit** is automatically applied to all searches performed by Ryan.

## **Step 3. Notification Alert Policies**

### **Additional Resources**

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For more information, refer to the article <u>Policy Alerts</u>, or log in to your Barracuda Message Archiver, go to the **POLICY** > **Alerts** page, and click **Help**.

You can enable policy alerts to send a notification to the administrator when corporate email is being used inappropriately or for non-business matters. Each time a message matching the specified criteria enters the Barracuda Message Archiver, an automatic email notification is sent based on the selected **Alert Frequency** on the **POLICY** > **Alerts** page.

To set up policy alerts, log in to the web interface, and on the **POLICY > Alerts** page, set **Enable Built-In Policies** to **Yes**, and click **Save**. Built-In Policies include:

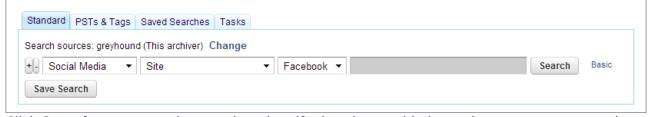
- **Personal Info** Looks for Personally Identifiable Information inside messages. It scans for various formats of Social Security numbers, credit card numbers, and other types of potentially sensitive information.
- **Foul Language** Looks for messages containing specific words that have been identified as *Foul Language*.
- **Personal Email** Looks for messages sent to and from various sites that have been classified as non-business sites, such as recreation or gambling sites.

In addition to built-in policies, you can define custom policies based on a Saved Search that you create on the **BASIC** > **Search** page.

### **USE CASE - Custom Alert Policy**

In this example, Sena is an administrator for the Barracuda Message Archiver at a local law firm. She wants to set up an alert whenever messages in the social media site 'Facebook' are encountered. Sena defines a custom alert policy in the Barracuda Message Archiver using the following steps:

- 1. On the **BASIC** > **Search** page, click **Advanced**.
- 2. Select **Social Media > Site** as the search criteria:



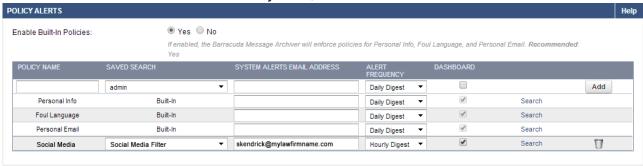
- 3. Click **Search** to execute the search and verify that the provided search parameters return the expected results.
- 4. Click **Save Search**, enter Social Media Filter for the name of the saved search, and click **OK**.
- 5. Go to the **POLICY** > **Alerts** page, enter Social Media as the **Policy Name**, select **Social**

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**Media Filter** from the **Saved Search** drop-down menu, enter the alert email address skendrick@mylawfirmname.com, and set **Dashboard** to **On** so that the custom policy statistics display in the **Policy Statistics** table on the **BASIC** > **Status** page.

6. Click **Add** to save and activate the Policy Alert, and then click **Save**:



Once activated, each time an email containing the social media site 'Facebook' is encountered, an alert notification is generated and sent to **skendrick@mylawfirmname.com**.

If the Saved Search is deleted from the **Saved Search** tab on the **BASIC** > **Search** page, the custom alert policy is automatically deleted from the **POLICY** > **Alerts** page.

## Step 4. Litigation Holds - Auditor Role Only

### **Additional Resources**

For more information, refer to the article <u>Litigation Holds</u>, or log in to your Barracuda Message Archiver using the Auditor role, and go to either of the following pages:

- POLICY > Retention page, and click Help
- BASIC > Search > Saved Search page, and click Help

A user with auditor role can create litigation holds which prevent messages matching the criteria of a specific Saved Search from being removed from the Barracuda Message Archiver. On the **BASIC** > **Search** > **Saved Search** page, litigation hold details include:

- Auditor The account name of the auditor who created the Litigation Hold
- Saved Search The name of the Saved Search associated with this Litigation Hold
- Hold End Date The date and time when this Litigation Hold expires

Before an auditor can set up a litigation hold, the administrator must first enable litigation holds by

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completing the following steps:

- 1. Log in to the Barracuda Message Archiver, and go to the **POLICY** > **Retention** page.
- Set Enable Litigation Holds to Yes, and click Save.

### **USE CASE - Litigation Hold**

In this example, Sue is a user with auditor role at a large corporation, and has been asked to set up a litigation hold to retain all emails related to the user 'Dallen' from their client 'CorpName'. Sue uses the following steps to set up the litigation hold:

- 1. Log in to the Barracuda Message Archiver in the auditor role.
- 2. Go to the **BASIC** > **Search** page, and click **Advanced**.
- Select Email > Domain > contains, and type @corpname.com as the domain name. Click the + symbol to the left of the search parameter.
- 4. Select **Email > From/To/Cc > contains**, and type dallen as the second set of search criteria:



- 5. Click **Search** to execute the search and verify that the provided search parameters return the expected results.
- 6. Click **Save Search**, and type dallen Litigation Hold as the **Saved Search** name:



7. Click **OK**. Click the **Saved Searches** tab:



- 8. In the **Actions** column, click **Apply Litigation Hold**. In the **Apply Litigation Hold** window, to hold the associated emails indefinitely, click **None**, or you can specify a specific expiry date. For this example, select **Specific Date**, click the **Calendar** icon, and select the date to end the litigation hold.
- 9. Click **OK** to apply the litigation hold.

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Once a litigation hold is added, it displays in the **Litigation Holds** section on the **POLICY** > **Retention** page when a user is *logged in using the admin role*:



## **Step 5. Retention Policies**

### **Additional Resources**

For more information, refer to the article <u>Retention Policies</u>, or log in to your Barracuda Message Archiver, go to the **POLICY** > **Retention** page, and click **Help**.

By default, automated archived message purging on the Barracuda Message Archiver is disabled. If you enable this ability, the Global Retention Policy and any Saved-Search retention policies are compared to all archived messages once a week. You can allow these messages to be deleted from the Barracuda Message Archiver based on the Saved Search retention policies. Note that before you can create a Saved Search retention policy, you must create at least one Saved Search in the **BASIC** > **Search** > **Advanced Search** page.

A Saved Search retention policy enables you to automatically expire messages matching a specified saved search. Use this feature to create exceptions to the global Retention Policy.

- The Global Retention Policy setting does not apply to any messages that match a Saved-Search retention policy. If the age of any message exceeds the maximum age allowed by all Saved-Search retention policies that apply to the message, that message is permanently deleted from the Barracuda Message Archiver.
- Saved searches containing tags, folders, or discovery fields cannot be used in a Saved Search retention policy and do not appear in the list of available Saved Searches.
- If a message matches more than one Saved Search-based policy, then the message is kept according to the longest policy length. If it matches a Saved Search-based policy and the global retention policy, then the Saved Search policy takes precedence.
- Once the Global Retention Policy is set, archived messages are automatically deleted from the Barracuda Message Archiver.

#### **USE CASE - Saved Search Retention Policy**

In this example, Kari is the administrator and wants to set the maximum age of a set of archived

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messages before they are permanently purged from the archive. Kari uses the following steps to set up a retention policy based on a Saved Search:

- 1. Go to the **BASIC** > **Search** page, and create a Saved Search with the desired criteria.
- 2. Go to the **POLICY** > **Retention** page, and set **Allow automatic message deletion** to **Yes**.
- 3. Note the value of the **Policy Length** set for the Global Retention Policy.
- 4. Click Add Retention Policy to open the Add Retention Policy dialog box. The Cloud Mode field displays the archived message cloud storage mode as defined on the ADVANCED > Cloud Storage page:
  - **Off** Messages are not copied to cloud storage.
  - Mirror All messages are copied to the cloud.
- 5. From the Saved Search drop-down menu, select the name of the saved search on which to base this retention policy.
- 6. In the **Keep on box** section, specify whether to retain archived messages forever, or for a specified number of days:
  - Forever Messages meeting the Saved Search criteria on this Barracuda Message Archiver are retained forever.
  - **For** Enter the number of days to retain archived messages that match the selected Saved Search criteria.
- Click Submit to save the Saved Search retention policy, and click Save in the POLICY > Retention page and add it to the table.

## Step 6. Search Mail Using the Web Interface

### **Additional Resources**

All user roles can view and search content associated with their own mailbox and any shared mailboxes.

For more information, refer to the article <u>Search Options and Configuration</u>, or log in to your Barracuda Message, go to the **BASIC** > **Search** page, and click **Help**.

If you are deploying multiple Barracuda Message Archivers, or using Cloud Storage to mirror data from the Barracuda Message Archiver to the Barracuda Cloud, you can use Federated Search to configure search across multiple Barracuda Message Archivers. For more information, see the <u>Federated Search</u> section.

There are two search modes on the **BASIC** > **Search** page:

• Basic - Run a search based on a word or phrase across all messages accessible by your

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account.

 Advanced – Run a complex search query based on multiple criteria; note that you can save queries for future use.

When you initially go to the **BASIC** > **Search** page, all messages accessible by your account display in the message list in the **Standard** tab.

Use the Basic Search mode to perform a quick search across all of your messages. Use Advanced Search mode to perform complex search queries based on selected attributes.

#### **USE CASE - Export Messages**

In this example, Uma works in a real estate office. She recently closed a sale for property on Hernandez Avenue with M. Beckly. The procedure in the office is to burn a CD with all correspondence regarding a sale once the sale is complete. Uma needs to search for all messages related to the sale, and then export the messages to a .**zip** file:

- 1. Log into the Barracuda Message Archiver as a user.
- 2. Go to the **BASIC** > **Search** page, and click **Advanced**.
- 3. Select **Email** > **From/To/Cc** > **contains**, type beckly as the first set of search criteria, and click the + symbol to the left of the search parameter.
- 4. To the right of the first set of search criteria, click **AND** to toggle to **OR**.
- 5. Select **All > Entire Message > contains**, and type hernandez:



- Click **Search** to execute the search and verify that the provided search parameters return the expected results.
- 7. In the results window, use **Ctrl-** and **Shift-**click to select all of the messages to include in the .zip file.
- 8. Click the **Tools** menu, and select **Export Messages**; in the **Export Messages** dialog box, specify the export details as follows:

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9. Click **OK**. Go to the **Tasks** tab to view the download progress. Once the download is complete, click **Download** to save the .**zip** file to your local system.

UMA can now burn the .zip file to a CD to place in M. Beckly's customer file.

#### **USE CASE - Authorized Search of Another User's Email**

In this example, Abe is a legal assistant for Dale. Dale often needs Abe to search through his email on his behalf. To avoid sharing Dale's Idap credentials with Abe, the administrator creates a local user account with entitlements so that Abe can access Dale's email:

#### Step 1. Administrator Creates a Local User Account

- 1. Log into the Barracuda Cloud Archiving Service as the account administrator.
- 2. Go to the **USERS** > **LDAP User Add/Update** page.
- 3. Type Abe's email address, abe@corporate.com, in the **Email Address** field, and select **User** from the **Role** drop-down menu.
- 4. In the **Include These Addresses** field, type Dale's email address, dale@corporate.com:



5. Click **Add**, and click **Save**.

## Step 2. Abe Searches Dale's Email

Dale asks Abe to search his account for all email correspondence with MarilynCorp during May, 2013.

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- 1. Abe logs into the Barracuda Message Archiver.
- Go to the BASIC > Search page, and click Advanced.
- 3. Select **Email > Entire Message**, and type MarilynCorp as the first set of search criteria.
- 4. Click the + symbol to the left of the search parameter. To the right of the first set of search criteria, leave the value as **AND**.
- 5. Select **Email** > **Date** > **on or after**, click in the associated field, and type or select the date **2013-05-01**.
- 6. Click the + symbol to the left of the search parameter. To the right of the first set of search criteria, leave the value as **AND**.
- 7. Select **Email** > **Date** > **on or before**, click in the associated field, and type or select the date **2013-05-31**:

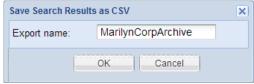


8. Click **Search** to execute the search.

## Step 3. Abe Saves Search Results

Abe now saves the search results as a .csv file that his manager, Dale, can download from the Tasks tab.

- Once the search results are returned, from the Tools menu, click Save Results as CSV.
- 2. In the **Export Name** field, type MarilynCorpArchive:



- 3. Click **OK**. The .csv file is now available for download from the **Tasks** tab.
- 4. Dale selects the item in the table, and clicks **Download** to save the .csv file to his local system.

## Step 7. View Reports

## **Additional Resources**

#### **Additional Resources**

For more information, refer to the article Reports, or log into your Barracuda Message Archiver,

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## go to the **BASIC** > **Reports** page, and click **Help**.

The built-in reports on the Barracuda Message Archiver provide statistics on various operational, legal, and storage aspects. Default reports include message archive growth, policy violations, archive traffic, and cost analysis and projected archive storage growth.

On the **BASIC** > **Reports** page you can generate the following reports:

- Email Activity Report View Barracuda Message Archiver email activity by user
- Top Storage Users Report View Barracuda Message Archiver storage usage by user
- Policy Violations Report View Barracuda Message Archiver email policy violations by user
- Global Searches Report View the top Barracuda Message Archiver global searches by user
- **Usage Report** Generate an overview of Barracuda Message Archiver cost analysis and projected archive storage growth

## **USE CASE - Automatically Generate Daily Reports**

In this example, Wiley, the system administrator, receives automated reports. His boss, Francis, wants to receive an automated report of policy violations at his email address 'francis@corporateid.com':

- 1. Log into the Barracuda Message Archiver, and go to the **BASIC** > **Reports** page.
- In the Automated Reports section, Wiley adds Francis' email address to the Policy Violations Report:



3. Click Save.

Francis will now receive a daily report of all policy violations, and the number of times each policy was violated, by user for the previous day. This report includes custom policies, and all built-in policies when enabled on the **POLICY** > **Alerts** page.

# **Step 8. View Statistics**

### **Additional Resources**

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For more information, refer to the article <u>Viewing Performance Statistics</u> or log into your Barracuda Message Archiver, go to the **BASIC** > **Status** page, and click **Help**.

View operating status on the **BASIC** > **Status** page when you log into the Barracuda Message Archiver using either the auditor or administrator role as described in the following table:

Status Type	Description
Message Statistics	A snapshot of archived email, appointments, contacts, distribution lists, notes, and tasks.
Policy Statistics	Statistics for built-in and custom policies configured and selected on the <b>POLICY &gt; Alerts</b> page.
Performance Statistics (1)	Current operating status and performance of the Barracuda Message Archiver including system load, firmware and mail/log storage, RAID disk array status, indexed queue length, storage percentages, and status of the connection to Barracuda Cloud Control.
Storage Statistics (1)	Statistics on the amount of data stored on the Barracuda Message Archiver by hour, day, and total.
Subscription Status (1)	Current status of your Energize Updates subscription, and the optional Instant Replacement and Premium Support subscriptions.
Cluster Status (1)	Number of messages awaiting processing on the Barracuda Message Archiver and its mirror, if one has been configured on the <b>ADVANCED</b> > <b>Clustering</b> page.
Hourly Statistics	Breakdown of message traffic and policy violations for the last 24 hours.
Daily Statistics	Breakdown of message traffic and policy violations for the last 30 days.
Note: (1) Statistics for this item are not visible when a user is logged in with the auditor role.	

## Step 9. Tools and Add-Ins

## **Additional Resources**

For more information, log into your Barracuda Message Archiver, go to the **USERS** > **Client Downloads** page, and click **Help**.

You can download and install Barracuda Message Archiver tools and add-ins to your local system.

#### **Barracuda Archive Search for Outlook**

Barracuda Archive Search for Outlook allows users to perform various functions with messages that are stored on your organization's Barracuda Message Archiver, including:

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- Synchronization of your archived folders with Outlook
- Search for archived messages and other Microsoft Outlook data, such as Contacts
- View and interact with (forward, reply to, etc.) all of your archived Outlook items
- Access stubbed attachments
- Archive messages

These functions are available directly from Outlook, allowing transparent access to your messages and attachments, all with no browser interaction required. All that is needed is a network connection to your organization's mail server and to the Barracuda Message Archiver.

### **Additional Resources**

- For deployment options, refer to Barracuda Archive Search for Outlook Deployment.
- For installation and configuration, refer to <u>Installing and Configuring Barracuda Archive</u> Search for Outlook.
- For details on searching and archiving messages, refer to <u>How to Search and Archive Messages Using Barracuda Archive Search for Outlook</u>.

#### **Barracuda Archive Search**

The Barracuda Archive Search provides access to the search features of the Barracuda Message Archiver for Mac OS X and Microsoft Windows users. This utility allows users to search through their own archived messages directly from their desktop without needing to log into the Barracuda Message Archiver web interface, and perform actions such as forwarding or replying to the located messages.

### **Additional Resources**

For installation, configuration, and deployment details, refer to <u>Barracuda Archive Search</u>, or log into your Barracuda Message Archiver, go to the **USERS > Client Downloads** page, and click **Help**.

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