

How to Configure and Run Policies

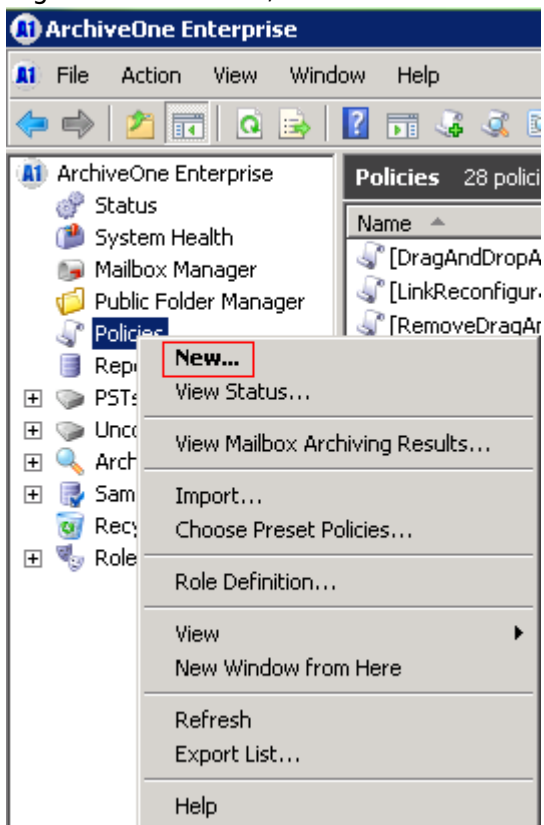
<https://campus.barracuda.com/doc/42048323/>

This article refers to the Barracuda ArchiveOne version 6.0 or higher.

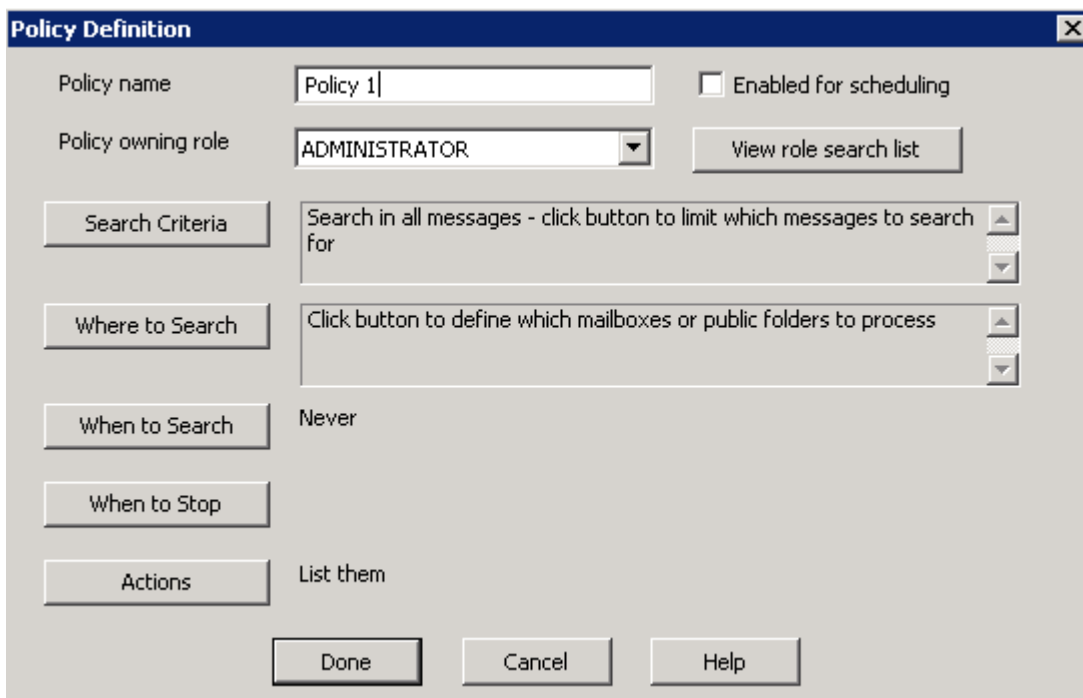
The following article explains how to configure and run a policy using the ArchiveOne Admin Console.

To create a new policy,

1. On the ArchiveOne Server, open the ArchiveOne Admin Console.
2. Right-click **Policies**, and then select **New**:



3. In the **Policy Definition** dialog box in the **Policy name** field, enter a name to identify the new policy:



Policy Definition

Policy name: Policy 1 ☐ Enabled for scheduling

Policy owning role: ADMINISTRATOR

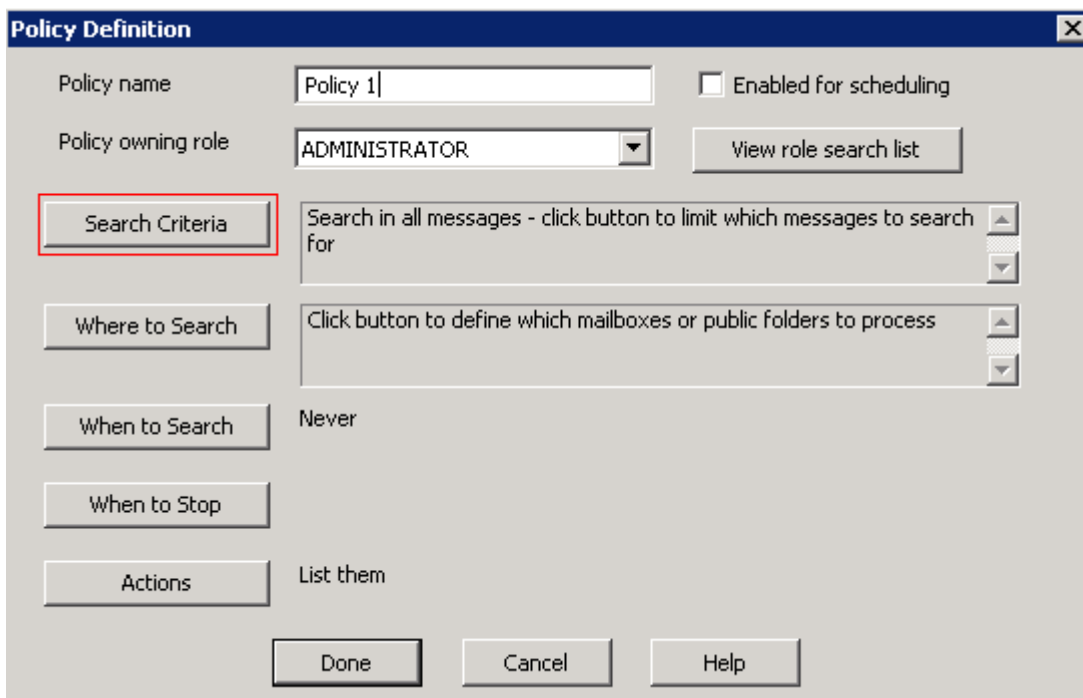
Search in all messages - click button to limit which messages to search for

Click button to define which mailboxes or public folders to process

Never

List them

4. Click **Search Criteria**:



Policy Definition

Policy name: Policy 1 ☐ Enabled for scheduling

Policy owning role: ADMINISTRATOR

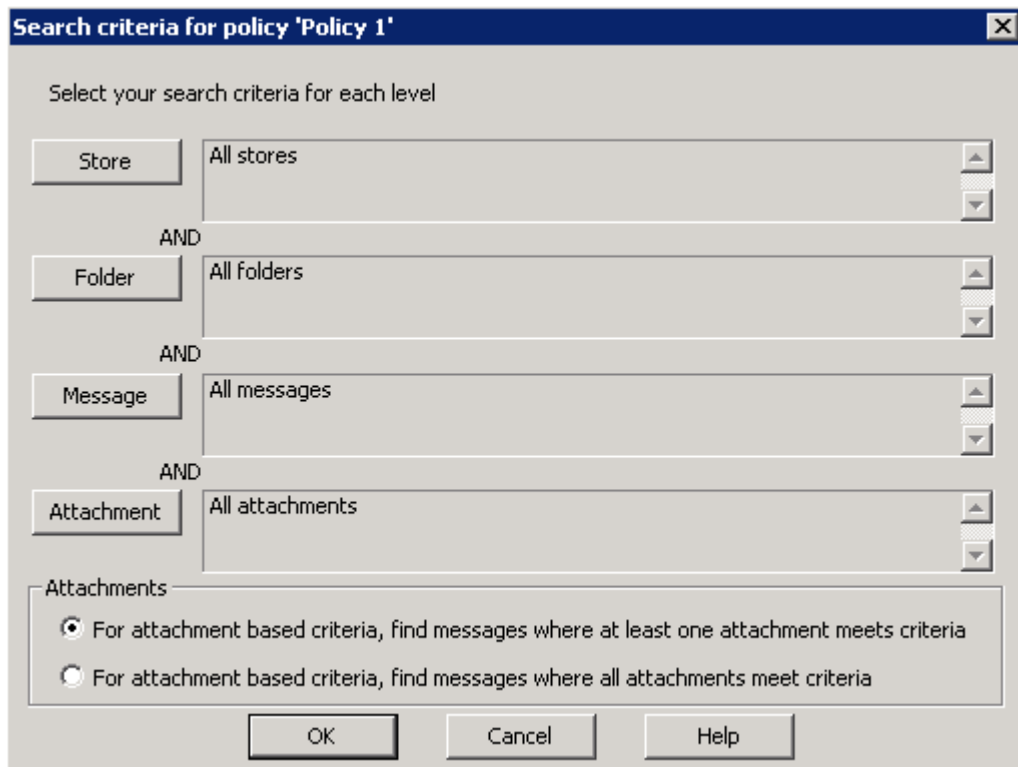
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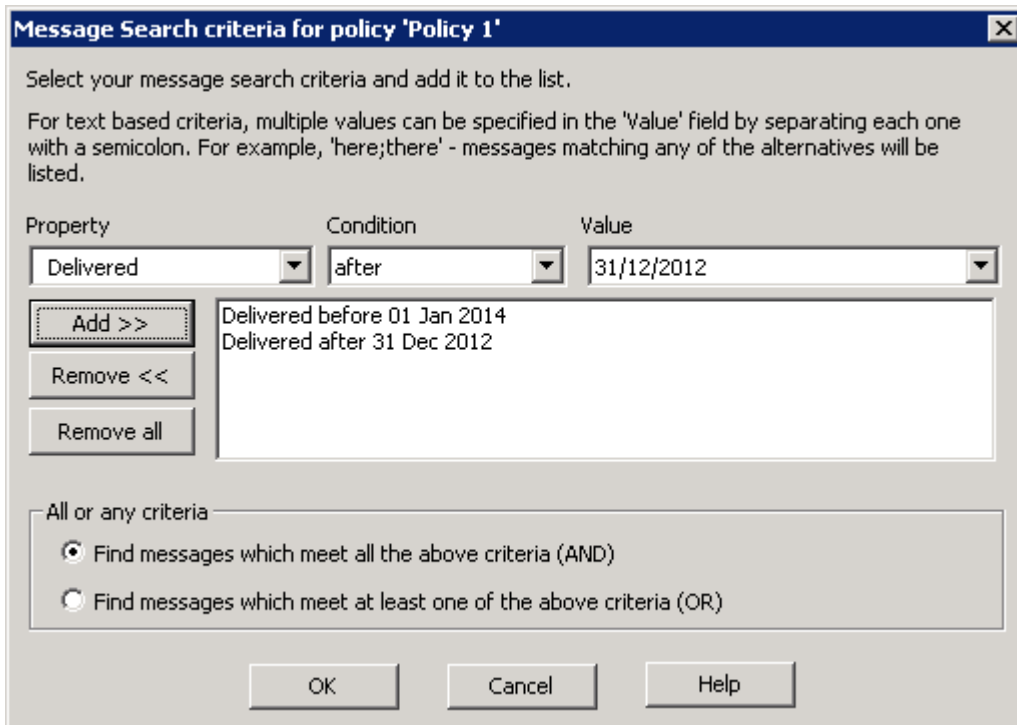
List them

5. Specify the search criteria for the policy in the **Search criteria for policy** dialog box:



- **Store** – Click to display criteria based on the mailbox store itself: mailbox name, mailbox size in MB or % of warn/send/receive limits, or total number of items.
- **Folder** – Click to display criteria based on folders: folder name/type/path, if replicated, or how many items it holds.
- **Message** – Click to display criteria based on messages: text in the subject and/or body, from, to, delivered, etc.
- **Attachment** – Click to display criteria based on attachments: file name, size in K, file date, last modified, or text within the document if the attachment has been indexed as well.

6. For example, click **Message** and select the search criteria:



Message Search criteria for policy 'Policy 1'

Select your message search criteria and add it to the list.

For text based criteria, multiple values can be specified in the 'Value' field by separating each one with a semicolon. For example, 'here;there' - messages matching any of the alternatives will be listed.

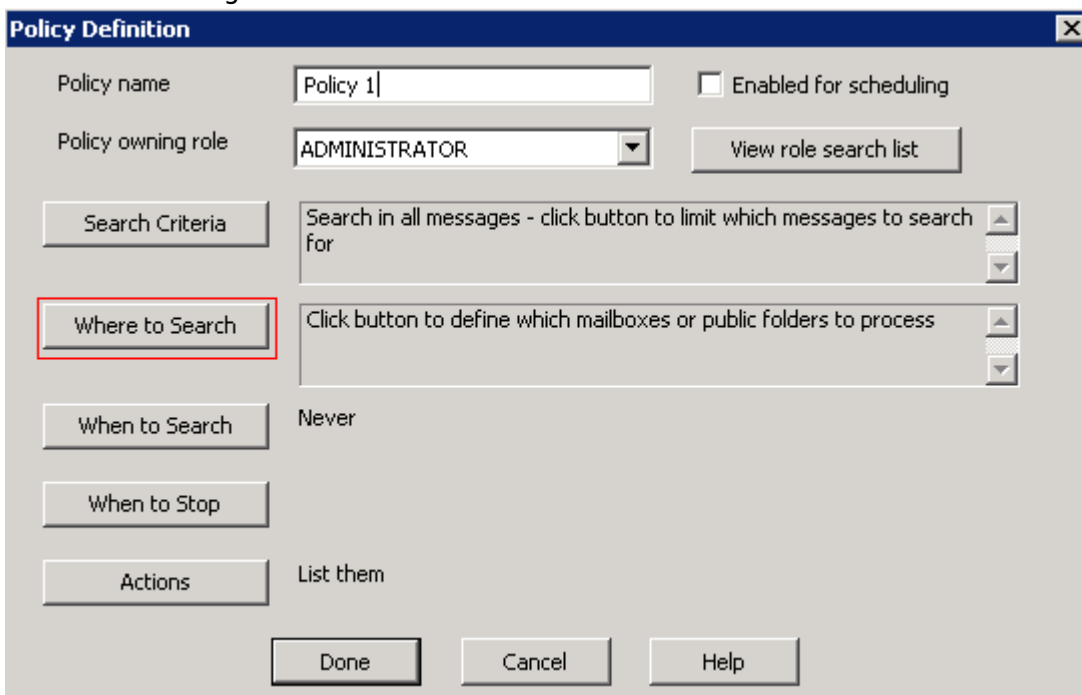
Property	Condition	Value
Delivered	after	31/12/2012

Delivered before 01 Jan 2014
 Delivered after 31 Dec 2012

All or any criteria

☒ Find messages which meet all the above criteria (AND)
☐ Find messages which meet at least one of the above criteria (OR)

- **Property** – Select the desired property of the message to search on such as who the message was 'To' or when it was 'Delivered'. Some of these are properties of the attachments, if any, to the message.
 - **Condition** – Select the range of conditions; options display based on the selected property (string or numeric).
 - **Value** – Select the value used to compare with the property's value.
7. Click **OK** to save your search criteria, and then click **OK** to return to the **Policy Definition** dialog box. Click **Where to Search**:

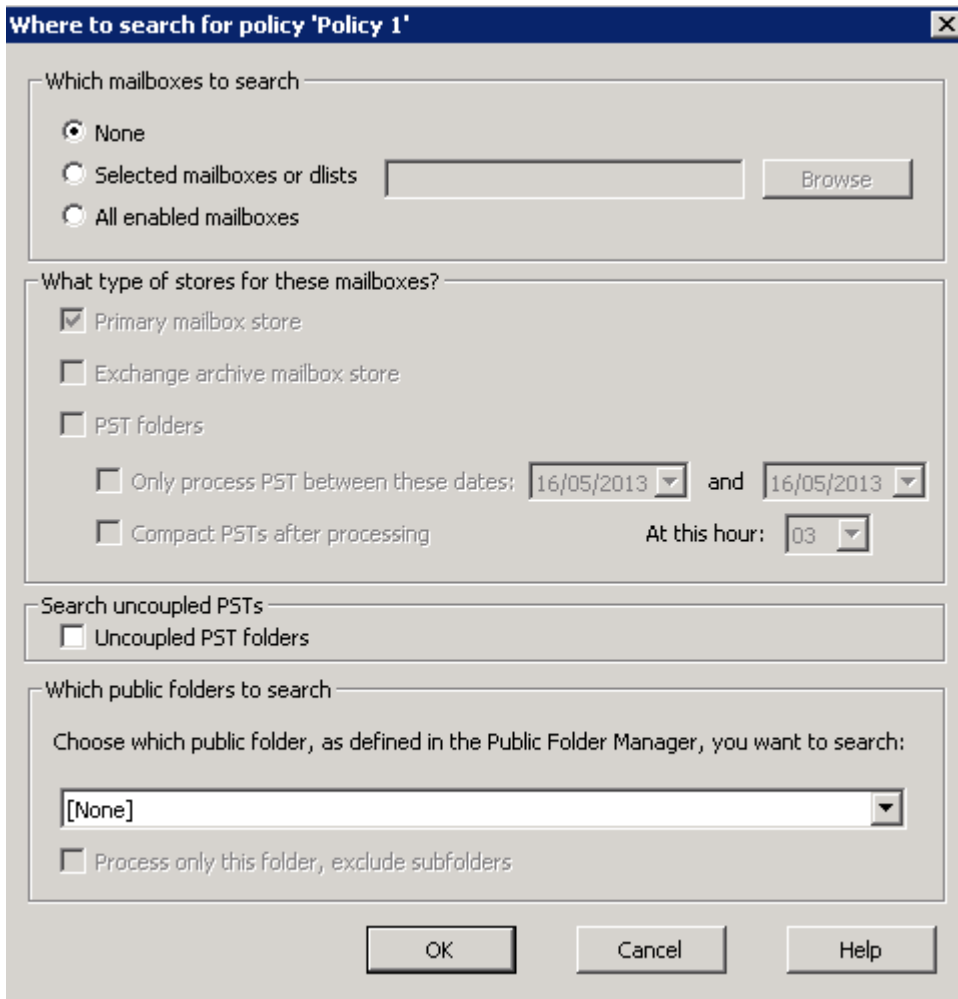


Policy Definition

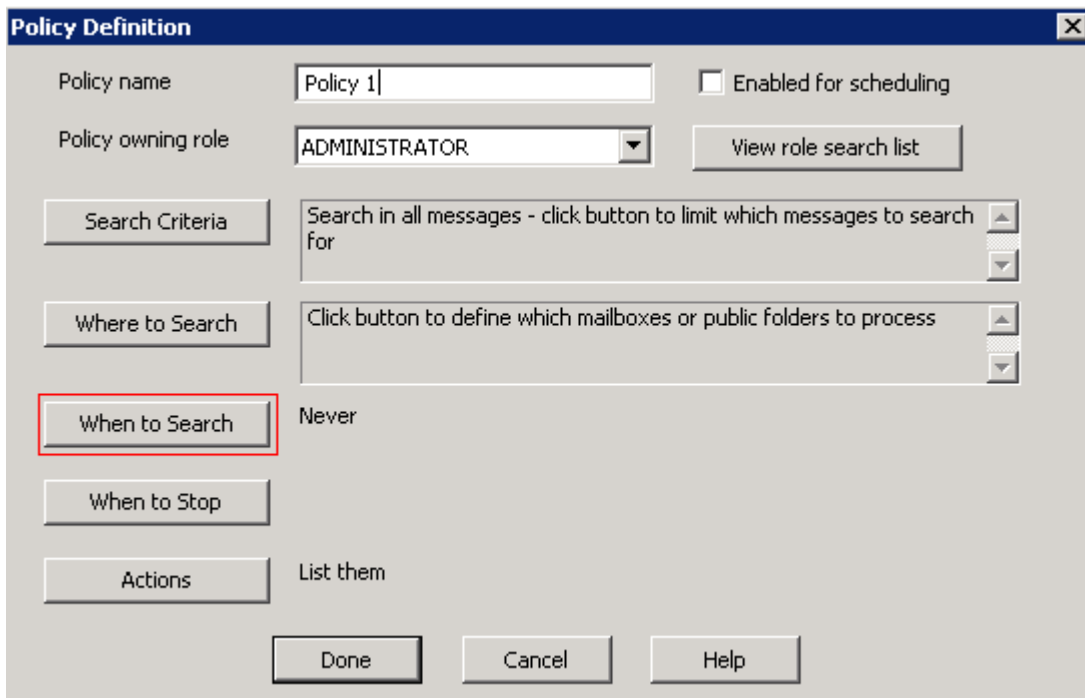
Policy name: ☐ Enabled for scheduling

Policy owning role:

8. In the **Where to search for policy** dialog box, specify the sources to process:



- **Which mailboxes to search** – Select none, all, or specify specific mailboxes or lists.
 - **What type of stores for these mailboxes** – Specify whether to process the mail store, the Exchange 2010 Archive Store, or PST folders associated with Outlook.
 - **Search uncoupled PSTs** – When selected, process PSTs that are not associated with Outlook.
 - **Which public folders to search** – Optionally select public folders to process.
9. Click **OK** to save your settings and return to the **Policy Definition** dialog box. Click **When to Search**:



The **Policy Definition** dialog box is used to configure a policy. It includes fields for the policy name, owning role, search criteria, where to search, when to search, when to stop, and actions. The **When to Search** button is highlighted with a red box.

Policy name: Policy 1 ☐ Enabled for scheduling

Policy owning role: ADMINISTRATOR

Search Criteria: Search in all messages - click button to limit which messages to search for

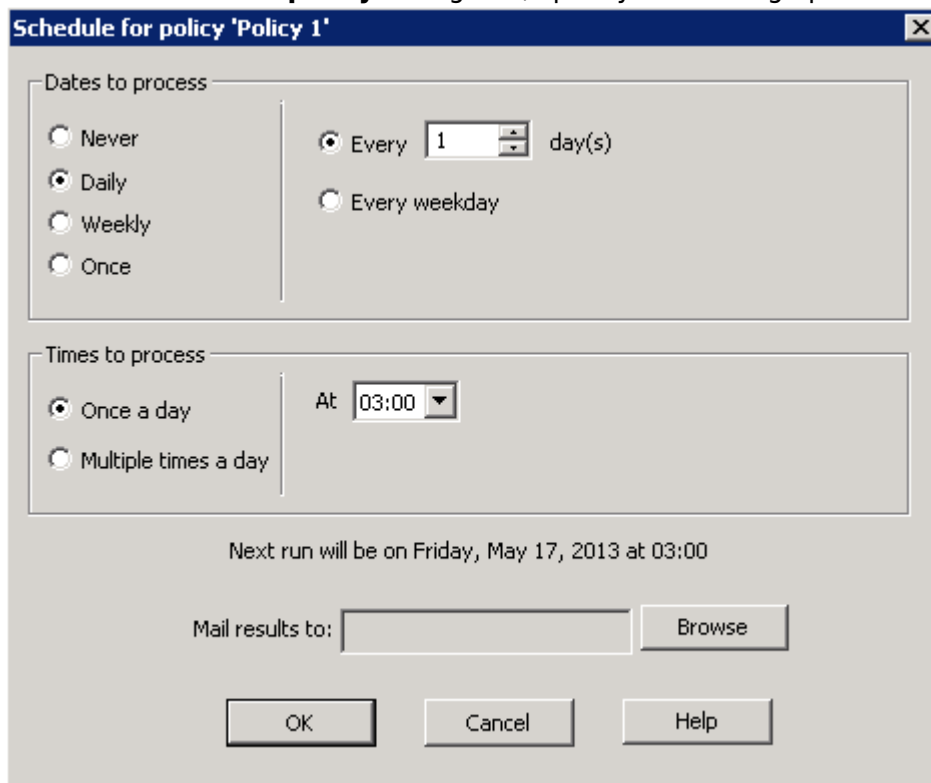
Where to Search: Click button to define which mailboxes or public folders to process

When to Search: Never

When to Stop:

Actions: List them

10. in the **Schedule for policy** dialog box, specify scheduling options:



The **Schedule for policy 'Policy 1'** dialog box is used to specify scheduling options. It includes sections for dates to process and times to process. The **Dates to process** section has radio buttons for Never, Daily, Weekly, and Once. The **Times to process** section has radio buttons for Once a day and Multiple times a day. The **Next run will be on Friday, May 17, 2013 at 03:00** is displayed. The **Mail results to:** field is empty, and the **Browse** button is visible.

Dates to process:

☐ Never ☒ Every 1 day(s) ☐ Every weekday

☒ Daily ☐ Weekly ☐ Once

Times to process:

☒ Once a day At 03:00 ☐ Multiple times a day

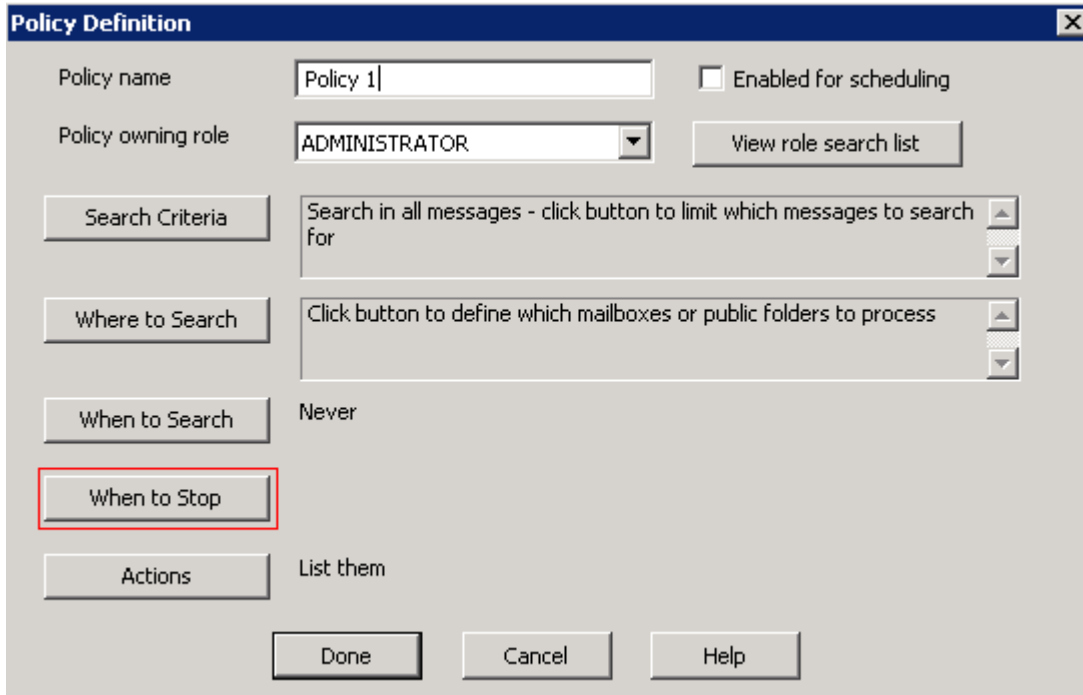
Next run will be on Friday, May 17, 2013 at 03:00

Mail results to:

o **Dates to process/Times to process:**

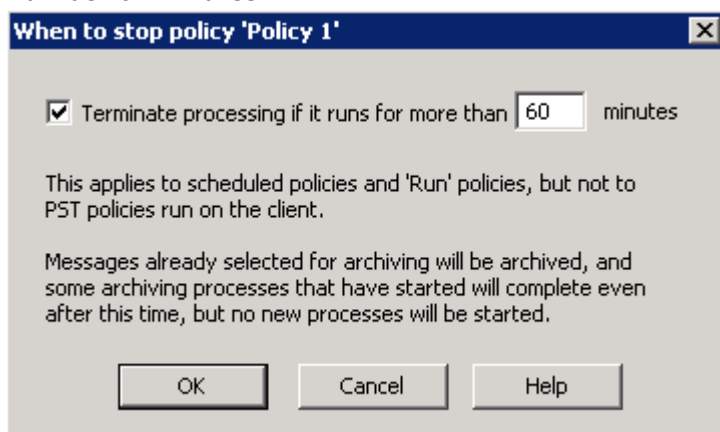
- **Never** - Default setting, no schedule is set.
- **Daily** - Set the schedule to run every n days (or every weekday), and at which time(s) to run the policy.
- **Weekly** - Set the schedule to run every n weeks on a set day(s) of the week, and at which time(s) to run the policy.

- **Once** – Set the schedule to run on a specific date, and at which time(s) to run the policy.
 - **Mail results to** – Email the policy results to the selected mailbox.
11. Click **OK** to save your settings and return to the **Policy Definition** dialog box. Click **When to Stop**:



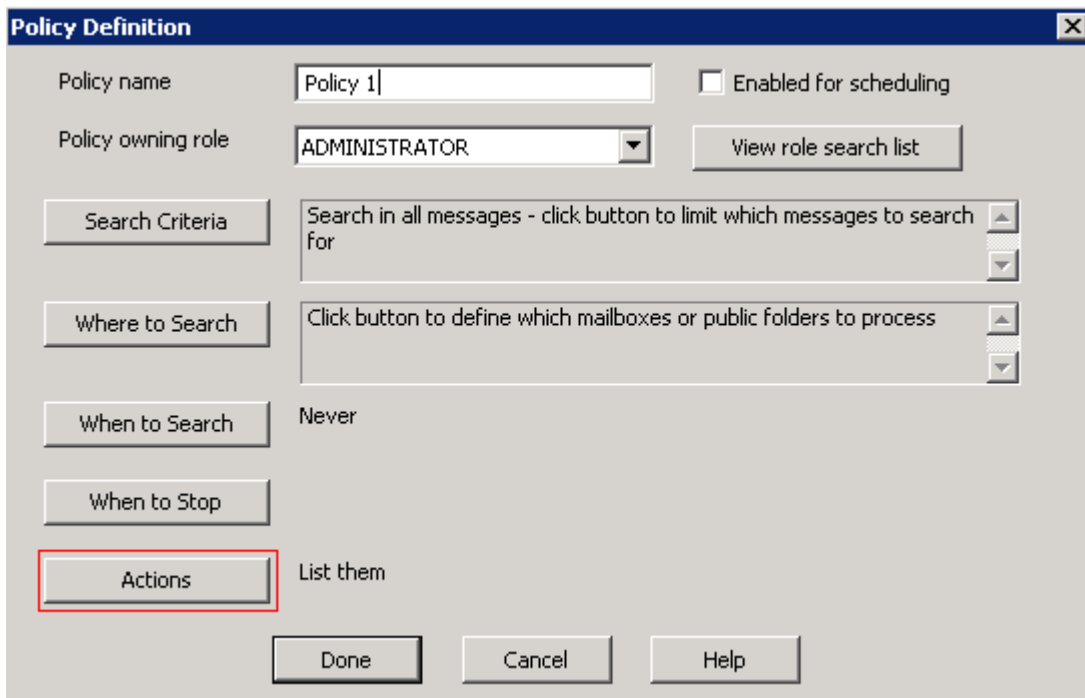
The **Policy Definition** dialog box is shown. It has a title bar with a close button. The main area contains several sections: 'Policy name' with a text box containing 'Policy 1' and a checkbox 'Enabled for scheduling'; 'Policy owning role' with a dropdown menu showing 'ADMINISTRATOR' and a 'View role search list' button; 'Search Criteria' with a text box containing 'Search in all messages - click button to limit which messages to search for'; 'Where to Search' with a text box containing 'Click button to define which mailboxes or public folders to process'; 'When to Search' with a text box containing 'Never'; 'When to Stop' with a text box containing 'List them' (this section is highlighted with a red rectangle); and 'Actions' with a text box containing 'List them'. At the bottom are 'Done', 'Cancel', and 'Help' buttons.

12. In the **When to stop policy** dialog box, select whether to stop the policy after a certain number of minutes:



The **When to stop policy 'Policy 1'** dialog box is shown. It has a title bar with a close button. The main area contains a checkbox 'Terminate processing if it runs for more than' which is checked, followed by a text box containing '60' and the word 'minutes'. Below this is a paragraph: 'This applies to scheduled policies and 'Run' policies, but not to PST policies run on the client.' Another paragraph follows: 'Messages already selected for archiving will be archived, and some archiving processes that have started will complete even after this time, but no new processes will be started.' At the bottom are 'OK', 'Cancel', and 'Help' buttons.

- **Terminate processing if it runs for more than *n* minutes** – Turn on to stop the first phase of the policy run after it has been running for the specified amount of time. The second phase is not affected by this setting.
13. Click **OK** to save your settings and return to the **Policy Definition** dialog box. Click **Actions**:

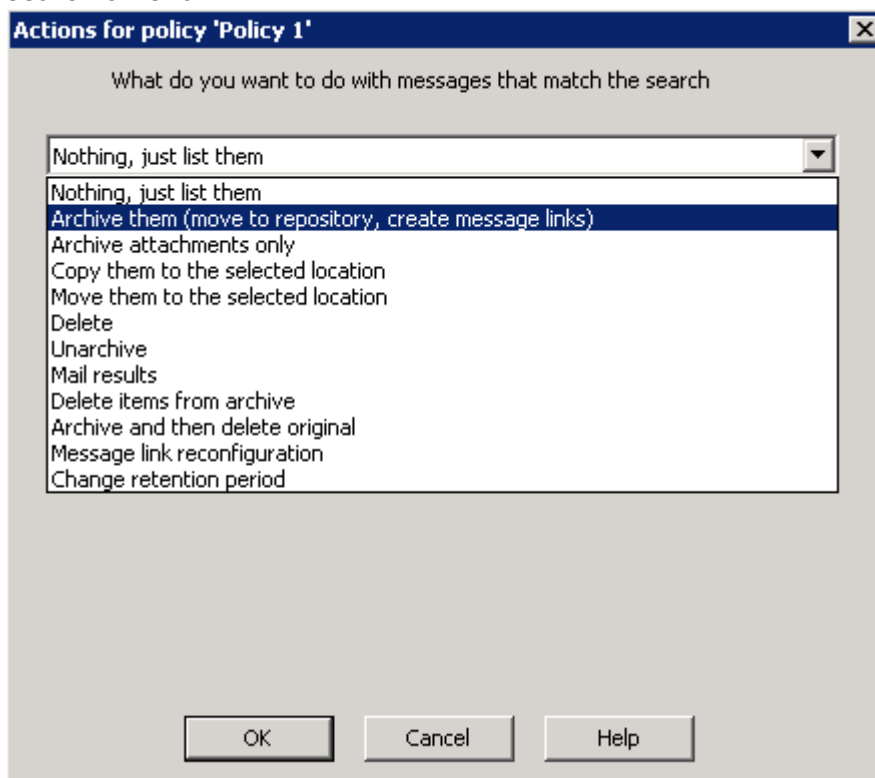


The **Policy Definition** dialog box is shown. It has a title bar with a close button. The main area contains several fields and buttons:

- Policy name:** A text box containing "Policy 1".
- Policy owning role:** A dropdown menu showing "ADMINISTRATOR". To its right is a button labeled "View role search list".
- Enabled for scheduling:** An unchecked checkbox.
- Search Criteria:** A button on the left and a text box on the right containing "Search in all messages - click button to limit which messages to search for".
- Where to Search:** A button on the left and a text box on the right containing "Click button to define which mailboxes or public folders to process".
- When to Search:** A button on the left and a text box on the right containing "Never".
- When to Stop:** A button on the left and an empty text box on the right.
- Actions:** A button on the left, highlighted with a red rectangle, and a text box on the right containing "List them".

At the bottom are three buttons: "Done", "Cancel", and "Help".

14. In the **Actions for policy** dialog box, select the action to take on messages that match the search criteria:



The **Actions for policy 'Policy 1'** dialog box is shown. It has a title bar with a close button. The main area contains a list box with the following options:

- Nothing, just list them
- Nothing, just list them
- Archive them (move to repository, create message links)
- Archive attachments only
- Copy them to the selected location
- Move them to the selected location
- Delete
- Unarchive
- Mail results
- Delete items from archive
- Archive and then delete original
- Message link reconfiguration
- Change retention period

At the bottom are three buttons: "OK", "Cancel", and "Help".

See [Understanding Policy Actions](#) for more information.

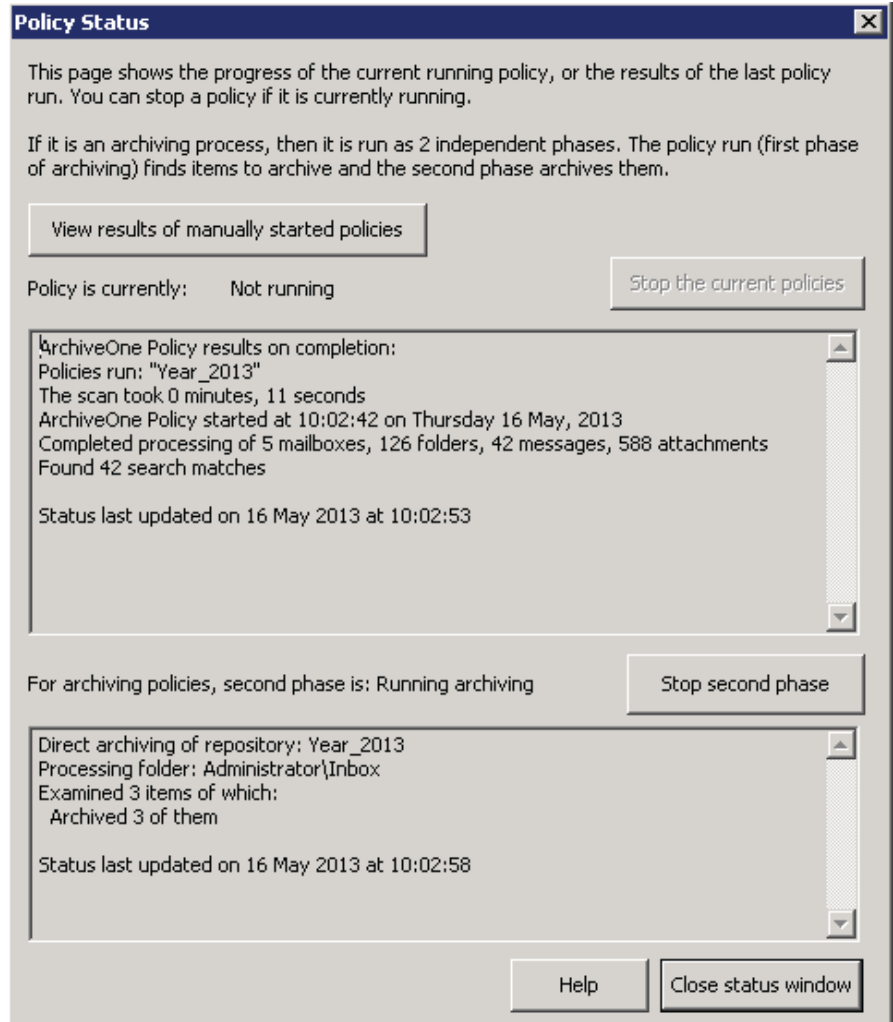
15. Click **OK** to save your settings, and then click **Done** in the **Policy Definition** dialog box to save your policy.

Use the following steps to immediately run a policy:

1. Open the ArchiveOne Admin Console, and click **Policies**.
2. Right-click the policy you want to run, and then click **Run**.
3. The **Policy Status** dialog box displays Policy processing details:

First phase includes mailbox, PST file, and Public Folder search for items matching Policy search criteria.

Second phase (runs only when Archive action is set on a Policy) archives items and stubs archived messages found in first phase of processing.



Policy Status

This page shows the progress of the current running policy, or the results of the last policy run. You can stop a policy if it is currently running.

If it is an archiving process, then it is run as 2 independent phases. The policy run (first phase of archiving) finds items to archive and the second phase archives them.

[View results of manually started policies](#)

Policy is currently: Not running [Stop the current policies](#)

ArchiveOne Policy results on completion:
Policies run: "Year_2013"
The scan took 0 minutes, 11 seconds
ArchiveOne Policy started at 10:02:42 on Thursday 16 May, 2013
Completed processing of 5 mailboxes, 126 folders, 42 messages, 588 attachments
Found 42 search matches
Status last updated on 16 May 2013 at 10:02:53

For archiving policies, second phase is: Running archiving [Stop second phase](#)

Direct archiving of repository: Year_2013
Processing folder: Administrator\Inbox
Examined 3 items of which:
Archived 3 of them
Status last updated on 16 May 2013 at 10:02:58

[Help](#) [Close status window](#)

Figures

1. new_policy.png
2. policy_def.png
3. click_search_criteria.png
4. search_criteria.png
5. policy1.png
6. click_where_to_search.png
7. where_to_search02.png
8. click_when_to_search.png
9. schedulepolicy.png
10. click_when_to_stop.png
11. when_to_stop.png
12. click_actions.png
13. actions_to_take.png
14. policy_status.png

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