

How to Configure and Run Policies

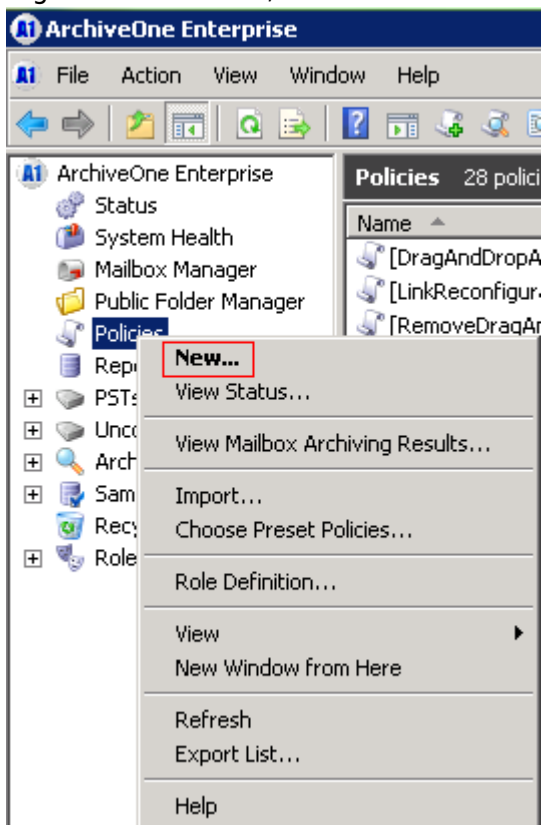
<https://campus.barracuda.com/doc/42048323/>

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

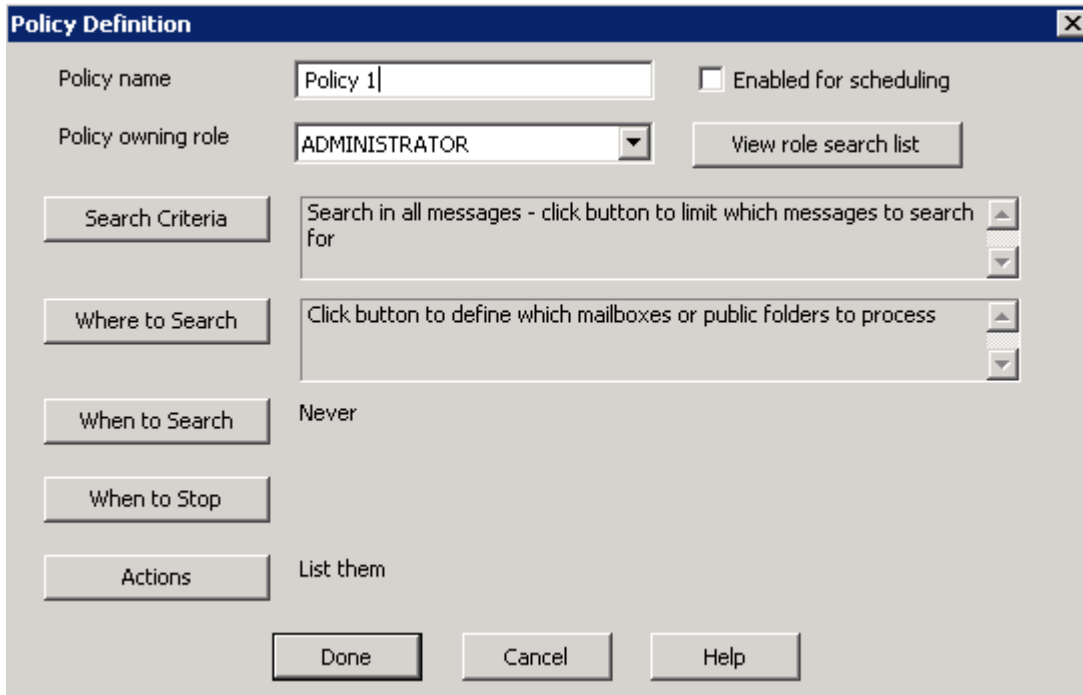
The following article explains how to configure and run a policy using the ArchiveOne Admin Console.

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

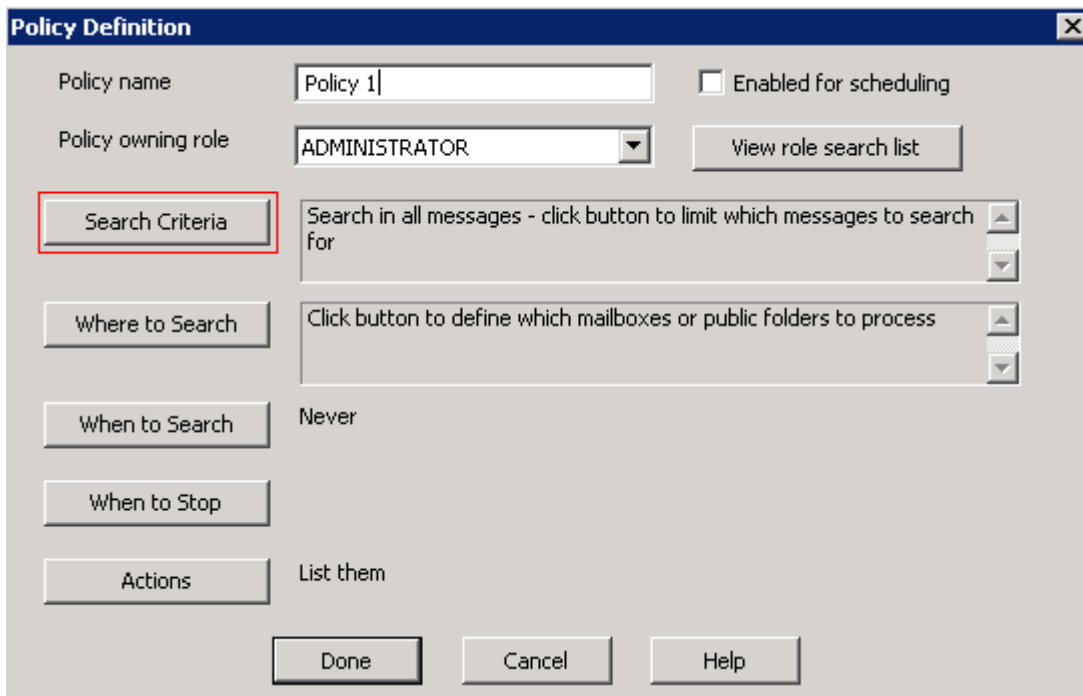
Where to Search: Click button to define which mailboxes or public folders to process

When to Search: Never

When to Stop

Actions: List them

4. Click **Search Criteria**:



Policy Definition

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

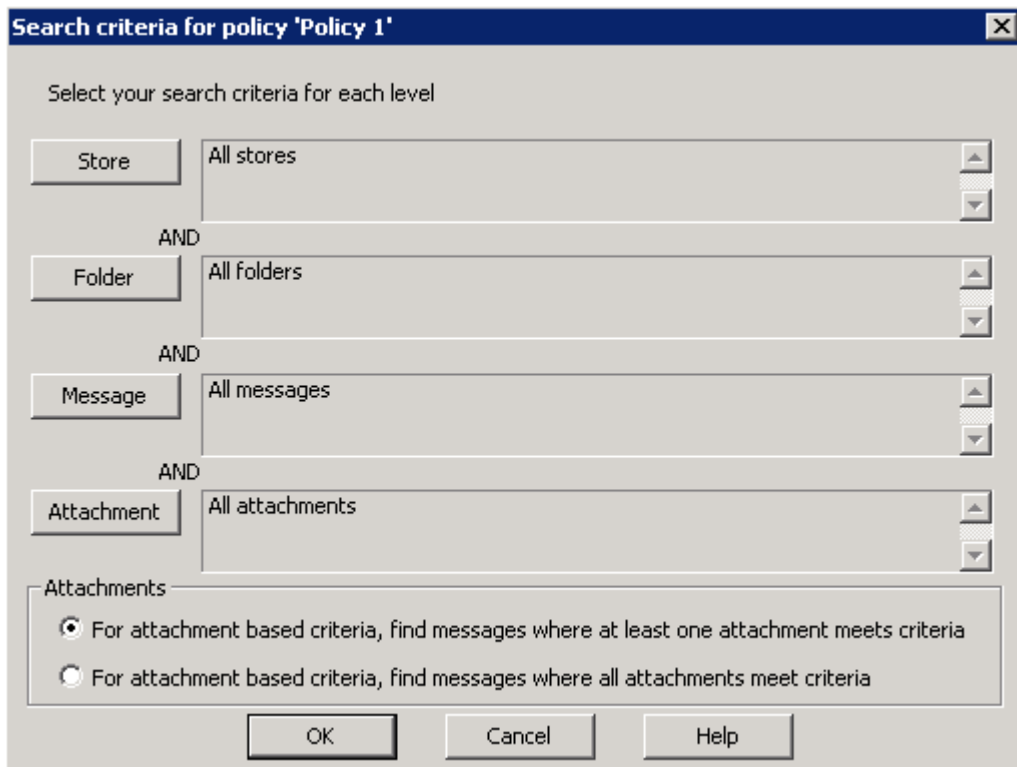
Where to Search: Click button to define which mailboxes or public folders to process

When to Search: Never

When to Stop

Actions: List them

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



Search criteria for policy 'Policy 1'

Select your search criteria for each level

Store All stores

AND

Folder All folders

AND

Message All messages

AND

Attachment All attachments

Attachments

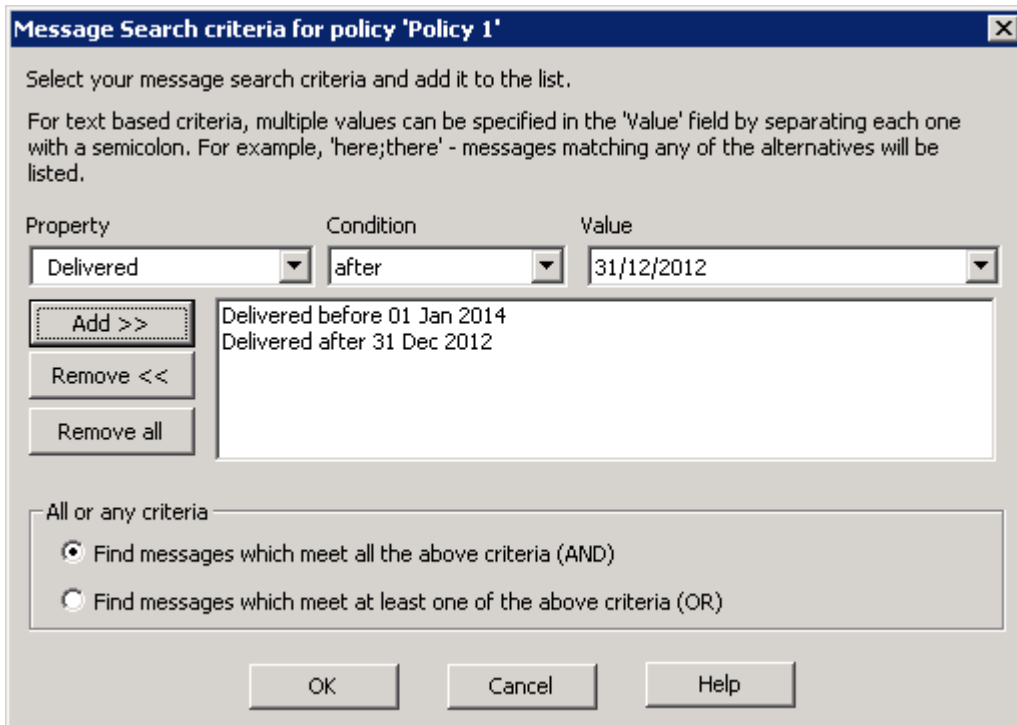
For attachment based criteria, find messages where at least one attachment meets criteria

For attachment based criteria, find messages where all attachments meet criteria

OK Cancel Help

- **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.

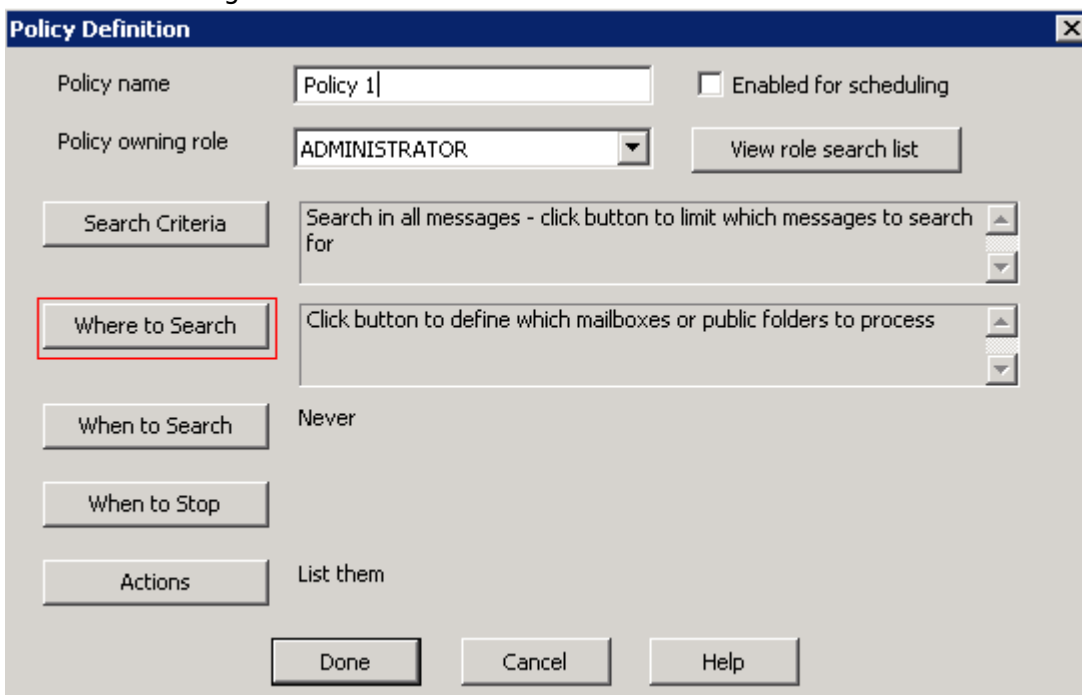
Property	Condition	Value
Delivered	after	31/12/2012

- 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: 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

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

Where to search for policy 'Policy 1'

Which mailboxes to search

None
 Selected mailboxes or dlists
 All enabled mailboxes

What type of stores for these mailboxes?

Primary mailbox store
 Exchange archive mailbox store
 PST folders
 Only process PST between these dates: and
 Compact PSTs after processing At this hour:

Search uncoupled PSTs

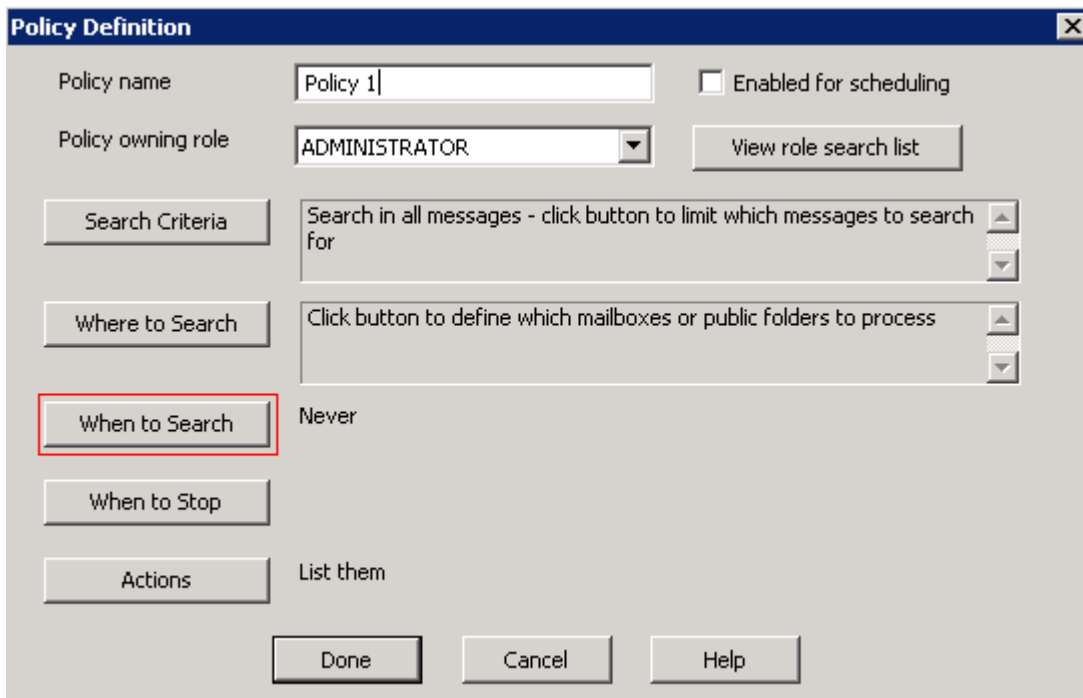
Uncoupled PST folders

Which public folders to search

Choose which public folder, as defined in the Public Folder Manager, you want to search:

Process only this folder, exclude subfolders

- **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**:



Policy Definition

Policy name: Policy 1 Enabled for scheduling

Policy owning role: ADMINISTRATOR

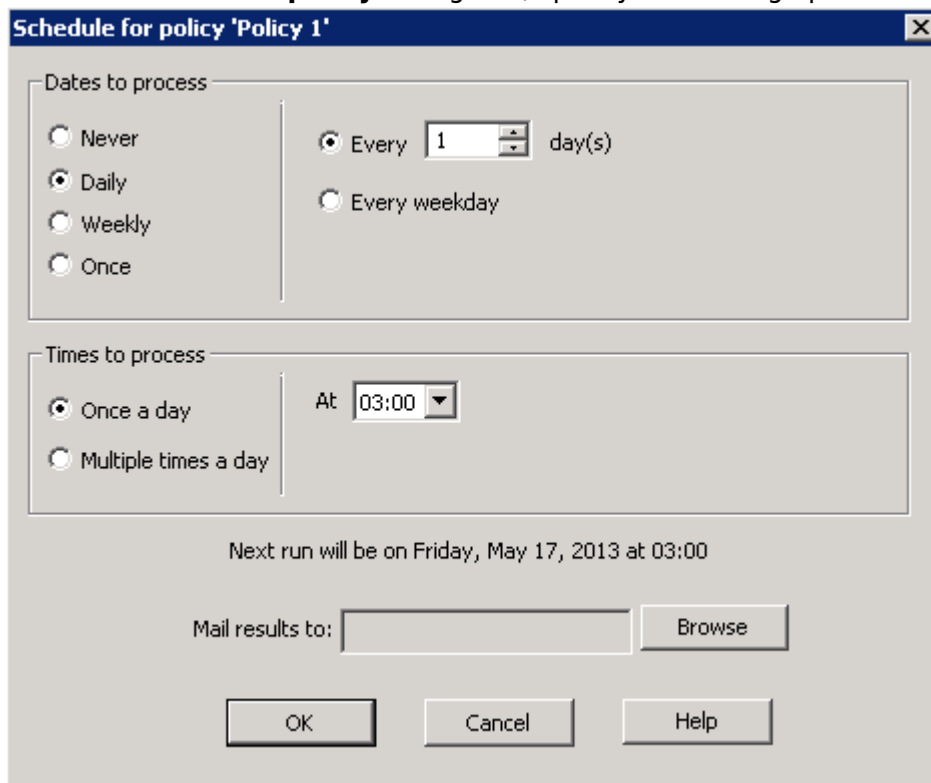
Search in all messages - click button to limit which messages to search for

Click button to define which mailboxes or public folders to process

Never

List them

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



Schedule for policy 'Policy 1'

Dates to process

Never
 Daily
 Weekly
 Once

Every 1 day(s)
 Every weekday

Times to process

Once a day
 Multiple times a day

At 03:00

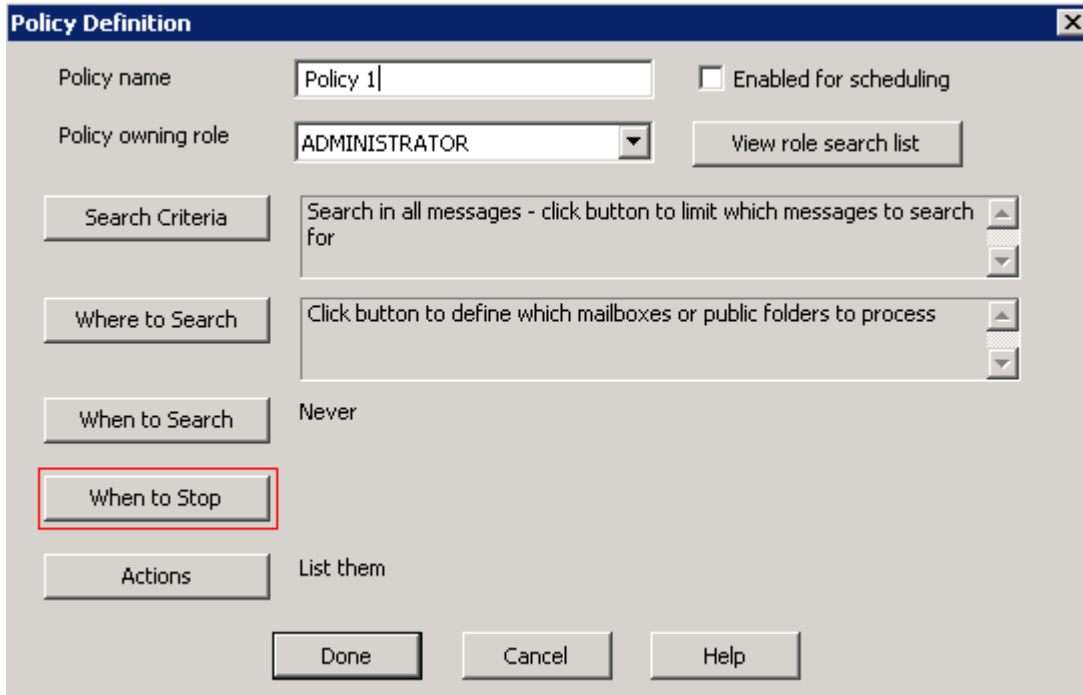
Next run will be on Friday, May 17, 2013 at 03:00

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.

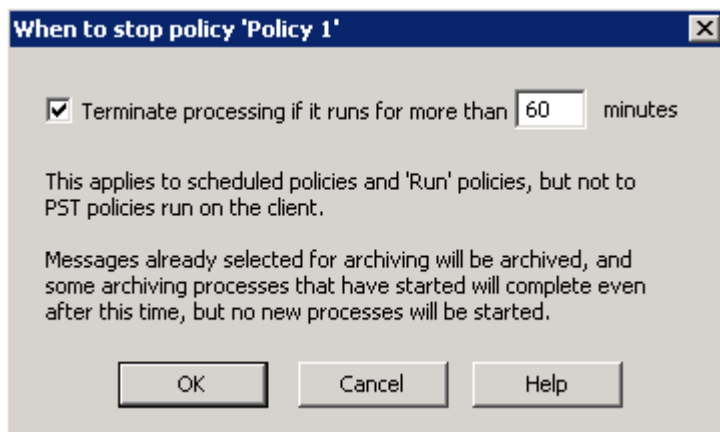
- **Once** – Set the schedule to run on a specific date, and at which time(s) to run the policy.
 - **Mail results to** – Email the policy results to the selected mailbox.
11. Click **OK** to save your settings and return to the **Policy Definition** dialog box. Click **When to Stop**:



The screenshot shows the 'Policy Definition' dialog box with the following fields and buttons:

- Policy name:** Policy 1
- Policy owning role:** ADMINISTRATOR
- Enabled for scheduling:**
- 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:** (This button is highlighted with a red rectangle)
- Actions:** List them
- Buttons:** Done, Cancel, Help

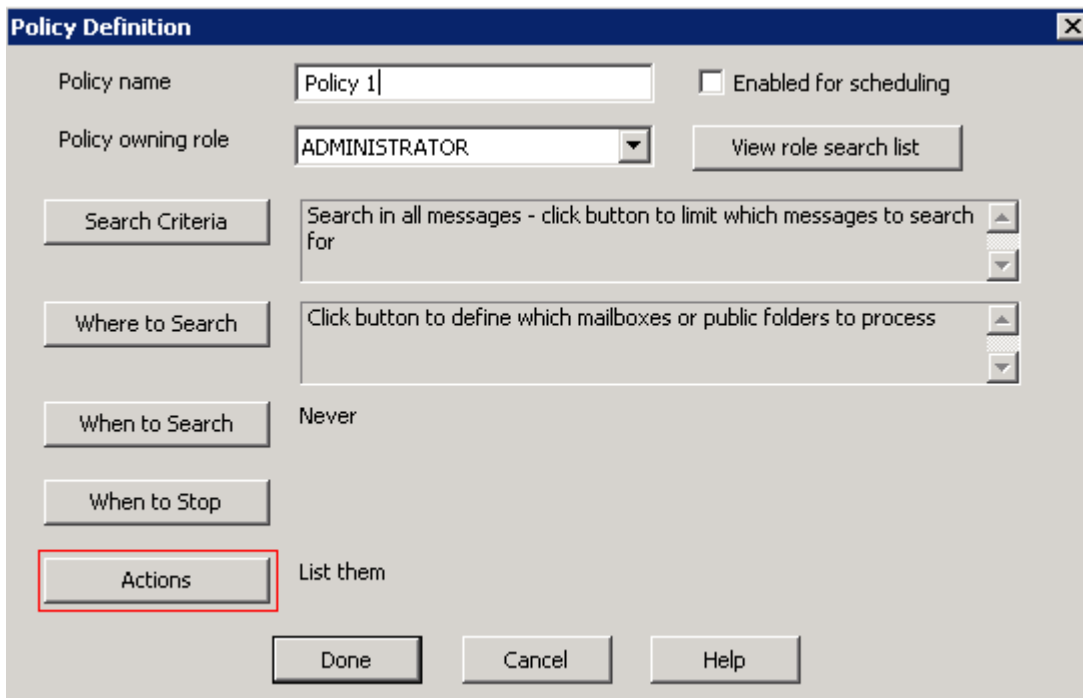
12. In the **When to stop policy** dialog box, select whether to stop the policy after a certain number of minutes:



The screenshot shows the 'When to stop policy' dialog box for 'Policy 1' with the following settings:

- Terminate processing if it runs for more than minutes
- This applies to scheduled policies and 'Run' policies, but not to PST policies run on the client.
- 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.
- Buttons:** OK, Cancel, Help

- **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**:



Policy Definition

Policy name: Policy 1 Enabled for scheduling

Policy owning role: ADMINISTRATOR

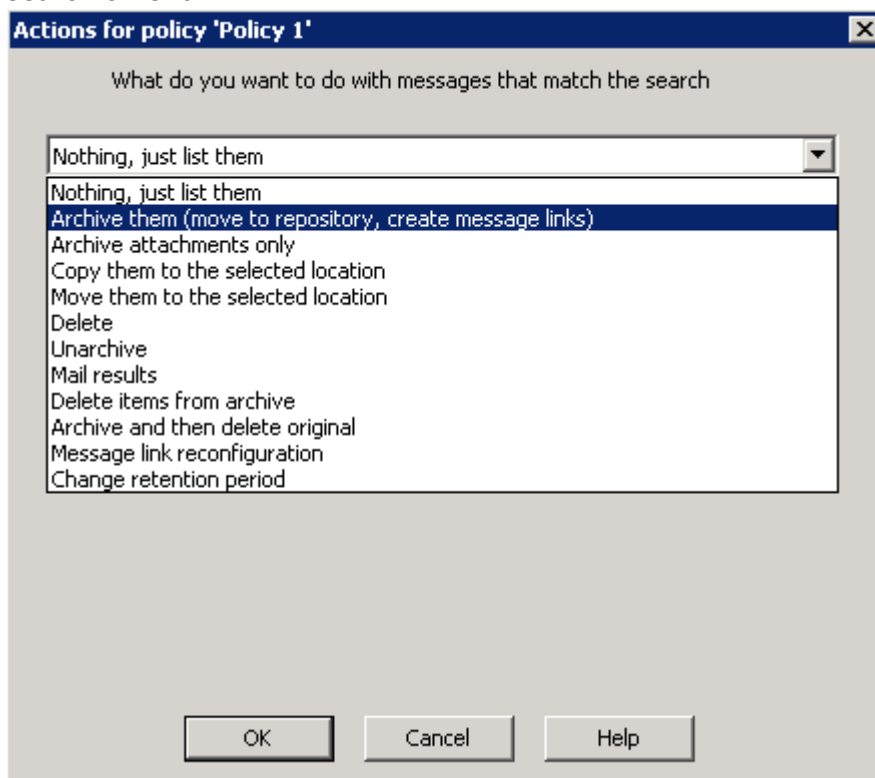
Search in all messages - click button to limit which messages to search for

Click button to define which mailboxes or public folders to process

Never

List them

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



Actions for policy 'Policy 1'

What do you want to do with messages that match the search

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

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

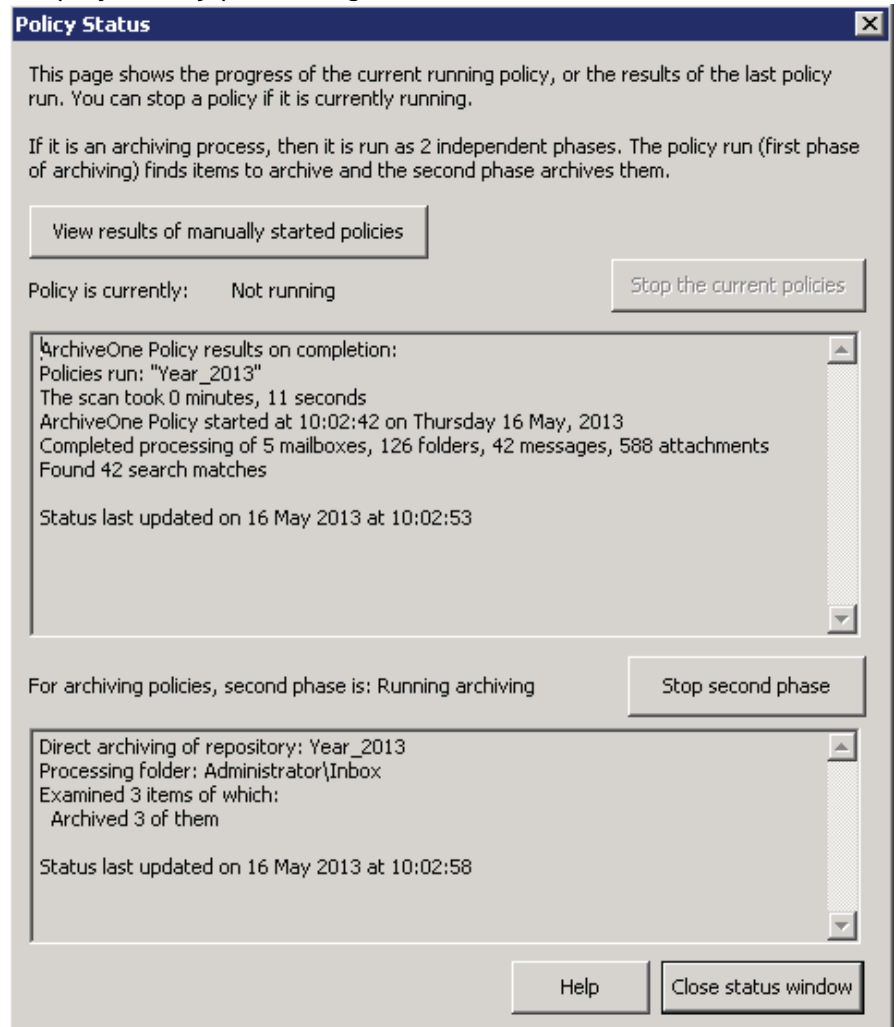
15. Click **OK** to save your settings, and then click **Done** in the **Policy Definition** dialog box to save your policy.

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 [X]

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

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2. policy_def.png
3. click_search_criteria.png
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6. click_where_to_search.png
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