Policies Node

https://campus.barracuda.com/doc/43222689/

You can configure policies to carry out searches across your Exchange information store for messages that meet specific criteria. For example, you can search for messages that have reached a certain age that you want to archive off of Exchange to a selected storage device. You can specify multiple policies, each with its own search criteria, actions, schedule for running, and other details.

You must set up criteria for your policy and then you can configure ArchiveOne to run the policy either as a scheduled task overnight or immediately. At the end of its run, a list of messages that meet the criteria display. See Policies for detailed information.

When you click **Policies** in ArchiveOne Admin, configured policies display in the right pane, including pre-defined policies that you can customize and subsequently use.

Policy behavior depends on the type of license you are using. For instance, if your license does not allow Journal Archiving you cannot run journal archiving on this node.

There are 3 types of policies:

- **Mailbox policies only apply to mailbox data**. In **Where to Search** select mailboxes defined in Mailbox Manager to which to apply the policy. A full set of policy actions is available for mailbox policies.
- **PST policies only apply to PST data**. In **Where to Search** select which previously discovered PST files you want the policy applied to, or select all PSTs owned by specified mailboxes. A limited set of actions are available for PST policies.
- **Journal policies only apply to journal data**. In **Where to Search** select which journal mailboxes, identified by examining the Exchange configuration, you want the policy applied to. Only the **archive** action is available for journal policies.

Operations on the **Policies** node include:

- **New** – Create a new policy. The **Policy definition** dialog box displays, including the default policy name. Enter a new name to represent the policy. You can customize these policies to include user-specific criteria and actions.
- **View Status** – Displays progress of the current Policy Manager task, and allows you to view the last task. From this dialog box you can stop the current policy or view the results of a manually invoked policy.
- **View Mailbox/Journal Archiving results** – Displays the results of all phase two archiving, that is, storage in the archive, for either mailbox archiving policies or journal archiving policies.
- **Run Journal Archiving Now** – Start the journal archiving process.
- **Import** – Import policy definitions previously exported using the **Policy Export** page where you select a policy export file from which to import policies. If a policy being imported has the same

name as an existing policy, and the existing policy is there because it was previously imported, then the new one overwrites the old one – otherwise if the names clash you are prompted to enter a new name.

- **Choose Preset Policies** – Displays a list of example policy groups. If you choose to create a set of policies from the list, they are created in the Policies node. Edit these policies to match your environment and requirements before use. For example, choose the list of mailboxes to process, choose a destination folder, and set a schedule.
- **Role definition** – Assign administrator roles on the policy.For more information, see how to Define Role Behavior.

Operations on a selected Policy include:

- **Edit** (or double-click the policy) – Displays the **Policy definition** dialog. See Policies for more information. Note that is not available on Journal Policies. To change Journal Archiving, run the Journal Archiving Wizard from the Status node.
- **Duplicate** – Creates an identical copy of the policy with a similar name.
- **Start now** – Executes the policy for immediate processing.
- **View Result of "Start now" runs** – View the results of a policy that has previously run using **Start now** (not available for PST policies).
- **View Result of scheduled runs** – View the results of a policy scheduled to run at a particular time (not available for PST policies).
- **Export** – Writes the selected policy's configuration to a file that can then be imported to another installation of ArchiveOne.
- **Delete** – Delete the selected policy. You can select whether to delete any results files associated with the policy.
- **Role definition** – Assign administrator roles on the policy. For more information, see how to Define Role Behavior.

Policy status:

- **View Status** – Displays progress of the current Policy Manager task, and allows you to view the last task. From this dialog box you can stop the current policy or view the results of a manually invoked policy. For more information, see Policy Status Window.

To run a policy, either right-click a policy name and click **Start now**, or specify a schedule and wait for it to run. The search may take some time if it is searching in a large number of folders. You can view the results using one of the **Show Results** menu options.

If you are running multiple instances of the ArchiveOne Admin application, changes made on this node in one instance may not visible on the other instance. If you suspect there have been changes, restart your instance to ensure it has up to date data.

Policy results are by default deleted when they are 90 days old. You can change this behavior using the option on the Status node configuration.