



How to Configure and Run a Policy

Applies to: ArchiveOne® Express; Topic Last Modified: 27 January 2010

Note

This topic explains how to use the ArchiveOne Express Admin Console to configure and run a simple policy.

Before you begin

Before you perform the procedure in this topic, be aware of the following:

- Must have mailboxes that contain mail.
- Must have proper user permissions to run ArchiveOne Express.
- The client machine will need either the Quick Link Client or the Laptop Client installed in order to most efficiently retrieve archived mail.

Procedure

To configure a policy

1. Open the ArchiveOne Express Admin Console.
2. Right click on **Policies** and select **New**.
 - Optionally, you can enter a name for this search in the top text box.
3. Click on the Search criteria button to display your selection of criteria:
 - **Store**: Click this button 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 this button to display criteria based on folders; folder name/type/path, if it's replicated, or how many items it holds.
 - **Message**: Click this button to display criteria based on messages; text in the subject and/or body, from, to, delivered, etc.
 - **Attachment**: Click this button to display criteria based on attachments; filename, size in K, file date, last modified, or text within the document if the attachment has been indexed as well.
 - **Attachments section**: These check boxes are specific to the Attachment criteria and allow you to select whether you want to find items that meet at least one of the configured criteria or whether the items must meet all of the configured criteria.
4. Click on the **Where to Search** button to display your selection of sources to process.
 - *Which mailboxes to search*: This section allows you to choose certain mailboxes to search into.
 - *What type of stores for these mailboxes*: This section allows you to specify whether you'd like to process the mail store or PSTs.

- *Search uncoupled PSTs*: Check this box for policies that process PSTs when you want to process uncoupled PSTs as well.
 - *Which public folders to search*: Use this to optionally select public folders to process.
5. Click the **When to Search** button to display your scheduling options:
 - *Never*: The default setting, which does not set a schedule.
 - *Daily*: This setting allows you to set the schedule to run every _ days (or every weekday), and at which time(s) to run the policy.
 - *Weekly*: This setting allows you to set the schedule to run every _ weeks on a set day(s) of the week, and at which time(s) to run the policy.
 - *Once*: This setting allows you to set the schedule to run on a specific date, and at which time(s) to run the policy.
 - *Mail results to*: This setting allows you to have the results of the policy run mailed to a specified mailbox.
 6. Click the **When to Stop** button to display the option to stop the policy after a certain number of minutes
 - *Terminate processing if it runs for more than _ minutes*: Check this box if you would like 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.
 7. Click on the **Actions** button to display the selection of what to do with the matching items.
 - *Archive them* (move to repository, create message links): Select this to archive items that match the configured criteria.
 - *Remove the message link if the message is deleted or expired* (this may significantly reduce the rate of archiving): Check this box if you would like to delete message links from users' mailboxes if the corresponding archived message has been removed from the repository. Note that this will slow down your policy run and these message links cannot be recreated.
 - *Enable repository override*: Check this box if you would like to archive items that match this policy to a specific repository.

To run a policy

1. Open the ArchiveOne Express Admin Console.
2. Click on **Policies**.
3. Right click on the policy that you want to run and select **Start Now**.
4. The policy will run:
 - The top portion of the window displays the first phase process; this is searching the specified mailboxes or Public Folders for items that match the criteria that you've configured.
 - The bottom portion of the window displays the second phase process; this is performing the action of archiving the items found in the first phase. This phase also stubs the archived messages.

For more information

For assistance with other features of ArchiveOne Express, see the other ArchiveOne Express documentation available from C2C:

- [C2C website](#)
- [C2C Support Portal](#)