



How to Configure and Run a Policy

Applies to: ArchiveOne® for Files; Topic Last Modified 04 August 2010.

Note

This topic explains how to use the ArchiveOne for Files 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 a Repository configured and available for use.
- Must have an Agent installed and configured with an appropriate area of interest.
- Must have proper user permissions to run ArchiveOne for Files.

Procedure

To configure a policy

1. Open the ArchiveOne for Files Admin Console
2. Right click on **Policies** and select **New Policy**.
 - Optionally, you can right click and select **New Policy** in the right-hand side pane.
3. When the 'Policy Definition' box appears, click **Next**.
4. In the top pane, select the categories of criteria which you require to be in the policy. This will result in the selections being added into the policy definition in the lower pane.
5. In the lower pane, select the blue highlighted text for each criteria category you have added.
6. Select an appropriate condition and enter an appropriate value, then click **OK**.
7. Repeat this process for each criteria category as required, then click **Next**.
8. Select which Agent(s) this policy will be applied to. The agent will specify the location of the files to be scanned for archiving. Once done, click **Next**.
9. Select the action that the policy needs to undertake. For a new policy, the '**List**' action is usually recommended. Once selected, click **Next**.
10. Give the Policy an appropriate name and, optionally, a description of what the policy is intended to do.
11. If all of the criteria, conditions and values have been entered, then click **Finish**.
12. The newly created policy should now appear in the policy list.
13. If you need to modify the policy further, double click the policy you wish to edit, and repeat the policy generation.

To run a policy

1. Open the ArchiveOne for Files Admin Console.
2. Click on **Policies**.
3. Right click on the policy that you want to run, and select **Start Now**.
4. The 'Policy Status' screen will now be displayed.
 - The screen shows the policy being run, the Agent that is being used and the status of the job.
 - Click on '**View Results**' to open a web page showing the files that matched the criteria.
 - When you are done with viewing the status, click **Close**. If the policy is still running, then clicking Close will not stop the policy.
5. You can see the Policy Status at any time by expanding the '**Policies**' node in the left hand pane and selecting the '**Policy Status**' node.

For more information

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

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