

# Metalogix® Archive Manager for Exchange 8.4

## **Administration Guide**



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### Legend

-  **CAUTION:** A caution icon indicates potential damage to hardware or loss of data if instructions are not followed.
-  **IMPORTANT, NOTE, TIP, MOBILE OR VIDEO:** An information icon indicates supporting information.

Metalogix® Archive Manager for Exchange

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# Contents

<b>Introduction</b> .....	<b>6</b>
<b>About the Administration Center</b> .....	<b>8</b>
<b>Tools, Options and Settings</b> .....	<b>18</b>
Mailbox Rights Manager .....	18
Check Mailboxes .....	26
Create Folders .....	27
Export Tasks .....	29
Statistics .....	35
Address Book Manager .....	36
Importing Microsoft Exchange Servers .....	38
Importing Mailboxes .....	45
Importing or Creating Groups .....	52
Synchronizing Address Book Manager .....	63
Managing Servers .....	67
Managing Groups .....	79
Managing Mailboxes .....	87
Options .....	97
Server settings .....	97
Archive settings .....	101
Message Classes .....	105
User Roles .....	108
Settings .....	110
Archive/Restore tab .....	110
Visualization tab .....	111
Others tab .....	112
<b>Manager view</b> .....	<b>115</b>
Groups tab .....	115
How to set a filter to display only desired groups .....	116
How to remove a filter .....	118
Setting criteria for group archiving .....	118
How to activate the archiving option for a group .....	127
How to deactivate a group from being able to archive .....	128
How to copy a group's settings .....	128
How to schedule group archiving .....	129
How to configure specific folders for automated archiving .....	130
How to display group members .....	131
Settings tab .....	131
Threshold settings .....	131
Adding a group/mailbox onto the Threshold tab .....	133
Setting the mailbox size limit, as well as Upper and Lower values .....	134
Outlook AddIn permissions .....	136

How to set Outlook AddIn Permissions .....	136
How to override global Outlook AddIn Permission settings .....	139
Group level retention .....	141
Shortcut templates .....	142
Shortcut to user assignment .....	148
Archive size report .....	149
How to create a report for all mailboxes, filtered mailboxes and distribution list .....	150
Notification settings .....	153
Public folders tab .....	156
How to set criteria for archiving a public folder .....	157
How to activate the archiving option for a public folder .....	161
How to deactivate the archiving option for a public folder .....	161
How to copy a public folder's settings .....	162
How to schedule archiving for a public folder .....	162
Jobs tab .....	163
How to create a job .....	163
Threshold job .....	167
Shortcut Sync job .....	169
Delete Files job .....	172
Normal job .....	173
How to archive emails of a group via a job .....	175
How to change job settings .....	177
How to start a job running immediately .....	178
How to stop a scheduled job .....	178
Job reporting .....	179
Retention tab – Retention Categories management .....	182
Retention categories and their usage .....	183
Creating a new retention category .....	184
Changing the settings of a retention category .....	189
Locations tab .....	191
<b>Status view .....</b>	<b>194</b>
<b>Archive view .....</b>	<b>199</b>
Mailboxes tab .....	199
How to manually archive an item .....	201
How to restore an item .....	204
How to manually archive all items in a folder/mailbox .....	205
How to restore all items in a folder/mailbox .....	206
Repairing shortcuts .....	208
Archive Wizard .....	208
Restore Wizard – How to restore only certain type of items .....	211
Restore Wizard – How to restore lost items for several mailboxes .....	213
How to manually create a shortcut for an archived item .....	216
Archive tab .....	217
Restoring lost items .....	218
Restoring lost items to a specific folder .....	220

Restoring mailbox folders .....	222
Public Folders tab .....	223
How to manually archive an item in an Outlook public folder .....	224
How to restore archived items of an Outlook public folder .....	226
Restore wizard .....	226
Public Folders Archive tab .....	227
Restoring lost items .....	228
Restoring public folders .....	229
<b>Post Processing .....</b>	<b>231</b>
<b>Advanced Search .....</b>	<b>238</b>
Search result options .....	243
Restore a copy .....	243
Restore To .....	244
Save search result to file .....	247
Export data .....	248
Mark for deletion .....	248
Recover document .....	249
<b>Appendix .....</b>	<b>251</b>
How to create a customized HTML shortcut template .....	251
<b>About Us .....</b>	<b>255</b>
Contacting Quest .....	255
Technical Support Resources .....	255

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# Introduction

Metalogix Archive Manager for Exchange is a comprehensive solution to consolidate, preserve, and retrieve your organization's emails from Microsoft Exchange Servers. This guide describes the information available to monitor and manage your deployment, the options, actions, and processes that you can leverage to archive emails, and the powerful search capability to locate and manage the archives.

## Managing the deployment

Whether you have a single-instance or a load-balanced distributed deployment with multiple archive and retrieval servers, managing their health is centralized in the Archive Manager for Exchange Administration Center (AMAC). The AMAC gives you full control of automated archival jobs for user mailboxes and public folders, Microsoft Exchange Server synchronization, compression, retention and threshold settings for mailboxes and groups, and a host of other controls to fine-tune the solution to the needs of your organization.

## Email archiving

When emails are archived with Archive Manager for Exchange, emails on the Microsoft Exchange Server or Office 365 are replaced by a shortcut. The original email and all its versions are stored in configurable external data stores. When you activate the Single Instance Store (SIS), duplicate copies of emails going to multiple users are automatically removed during the archival process. As a result, large amounts of corporate storage space is saved, dependency on PST files is eliminated and your Microsoft Exchange Server retains its stability by eliminating the unnecessary data.

## Advanced search and eDiscovery

With the powerful search capability of the AMAC, you can retrieve emails on demand. You can conduct focused searches by name, date range, and specific words, and export the results for review. You can put selected groups of data on legal hold, or suspend them from disposition policies.

The Metalogix Archive Manager for Exchange solution offers a variety of installable features and extensions that simplify the collection, storage, availability, and protection of your organization's data.

## PST protection and elimination

The PST Gatherer is an extension that complements the PST Importer feature to help you collect, upload, and archive PST files. Emails are safely archived and available on-demand even when working remotely and without changing the end user's Outlook folder structure. You can eliminate corrupted files, password-protected files, and islands of information. For more information see the *PST Importer Administration Guide*.

## **Lifecycle management**

You can capture, route, store, restore and manage archived emails externally with the Hierarchical Storage Management (HSM) archive engine. HSM automatically controls the retention policy of archived emails. The HSM engine can control a large range of external stores like DVD, CD-ROM, HDD, tape, SAN, Jukebox systems, EMC Centera, NetApp, JVC, and many other on-premise or cloud-based data storage solutions. You can move emails to cheaper locations as their relevance changes and keep the option of deleting old messages unless they are on legal hold. For more information see the *Hierarchical Storage Management (HSM) Guide*.

## **Disaster management and high availability**

You can archive messages in parallel to multiple locations in real-time and provide a backup of the archive on-the-go. With HSM, you can quickly retrieve archived emails from either location and activate continuous off-site replication for deploying data disaster recovery, so end-users are covered in the event of an outage.

## **Online on-demand access**

With ArchiveWeb installed, you can work with archived emails even if the Microsoft Exchange Server is unavailable. When you install the Outlook AddIn for your users, they can archive and restore their emails on the go. For more information see the *MS Outlook Addin User Guide*. With the Archive Manager Outlook Web Access (OWA) support emails are available to users online. For more information see the *OWA Installation Guide*. Also, mobile users, Mac users, and Linux users can work with archived emails when the Archive manager Universal Access extension is installed. For more information see the *Universal Access Installation Guide*.

---

# About the Administration Center

The Archive Manager for Exchange Administration Center (AMAC) provides you with all the information available to monitor and manage your deployment, the options, actions, and processes that you can leverage to archive and work with emails, and a powerful search capability to locate and manage the archives.

In this chapter:

- [Starting the AMAC](#)
- [Managing Sessions](#)
- [Views](#)
  - [Manager View](#)
  - [Status View](#)
  - [Archive View](#)
  - [Toolbar Icons](#)
- [Tools](#)
- [Help](#)

## Starting the AMAC

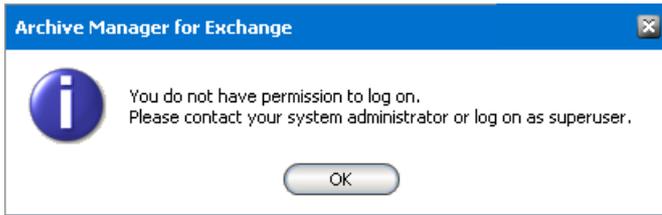
You can start the AMAC in two ways:

1. Login to the Archive Manager for Exchange server.

Unless you added and granted the necessary permission to additional users, you must login as the *superuser* to access the AMAC. A *superuser* account is a windows account with enterprise administrator privileges to work with the Archive Manager for Exchange administration tools, run services, manage databases, and manage extensions. It also has elevated privileges to interact with the on-premise or online Microsoft Exchange servers.

If the Archive Manager for Exchange server is connected to Office 365, you must login as the *superuser*.

You can grant logon permissions to additional users from the **Tools > Options > User Roles** tab. For more information see [Tools, Options and Settings](#). If you attempt to start the AMAC while logged on as another user without sufficient rights, a notification dialog appears which informs you that your user does not have enough permission to log on.



2. Go to **Start > Programs > Metalogix** and click **Archive Manager for Exchange**.

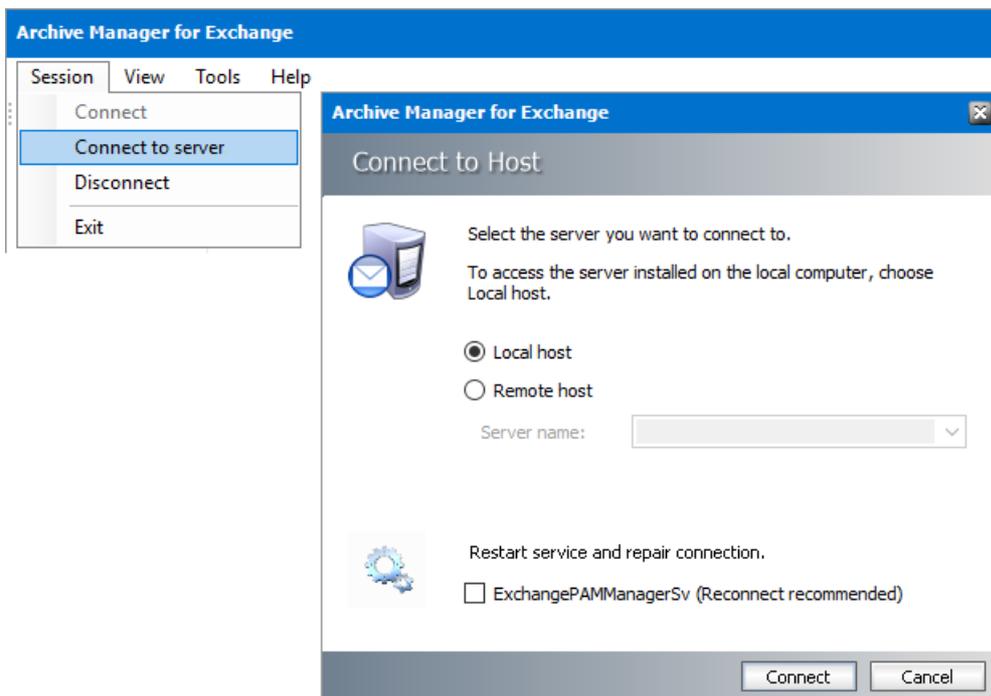
or

Go to `C:\Program Files (x86)\Metalogix\MAM4Exchange\Applications\EnterpriseManager` and click **PamEnterpriseMan.exe**

3. The AMAC opens and the [Manager view](#) is displayed.

## Managing Sessions

Via **Archive Manager for Exchange** administrator can connect to and administer also other Archive Manager servers, if such are installed. To do so, on the **Session** menu click **Connect to server**. New window pops-up. Switch to **Remote host** and enter the name of the server you want to connect to in the **Server name** combo box. Then click **OK**.



To access the server installed on the local computer, switch to **Local host** and click **OK**.

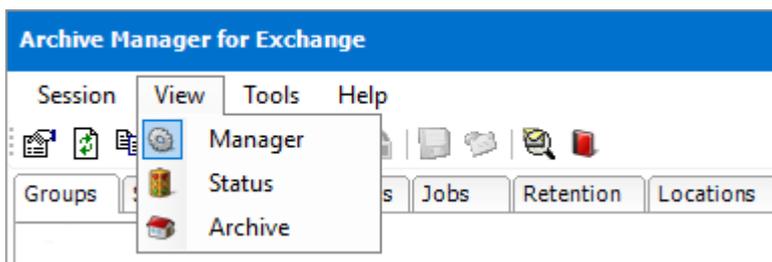
## Views

There are three views in the AMAC:

- **Manager** view - default view that provides you with all the capabilities to manage your deployment.
- **Status** view - provides the information to monitor and your deployment and start or stop services.
- **Archive** view - provides a full range of manual archival and retrieval features for mailboxes and public folders.

There are three ways to open or move between these views:

1. Use the following keyboard keys
  - **CTRL-1** for the Manager view.
  - **CTRL 2** for the Status view.
  - **CTRL 3** for the Archive view.
2. Open the **View** menu and select **Manager**, **Status**, or **Archive**

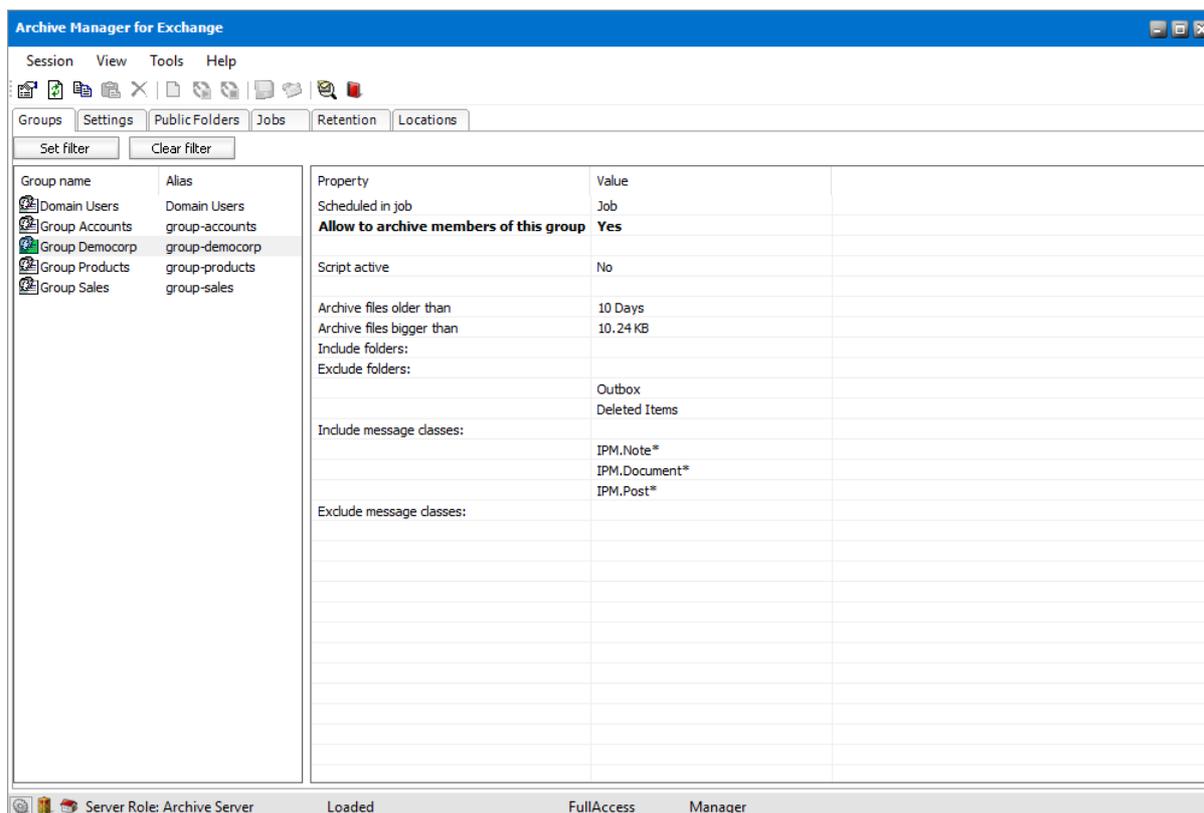


3. Click the respective icons in the lower left corner of the AMAC.

**i** **NOTE:** AMAC can run in Full Access or Read-only mode. In the read-only mode the configuration is locked, but archive management through the **Archive** view is not affected. So in read-only mode you can manually archive and restore emails, but the settings cannot be changed.

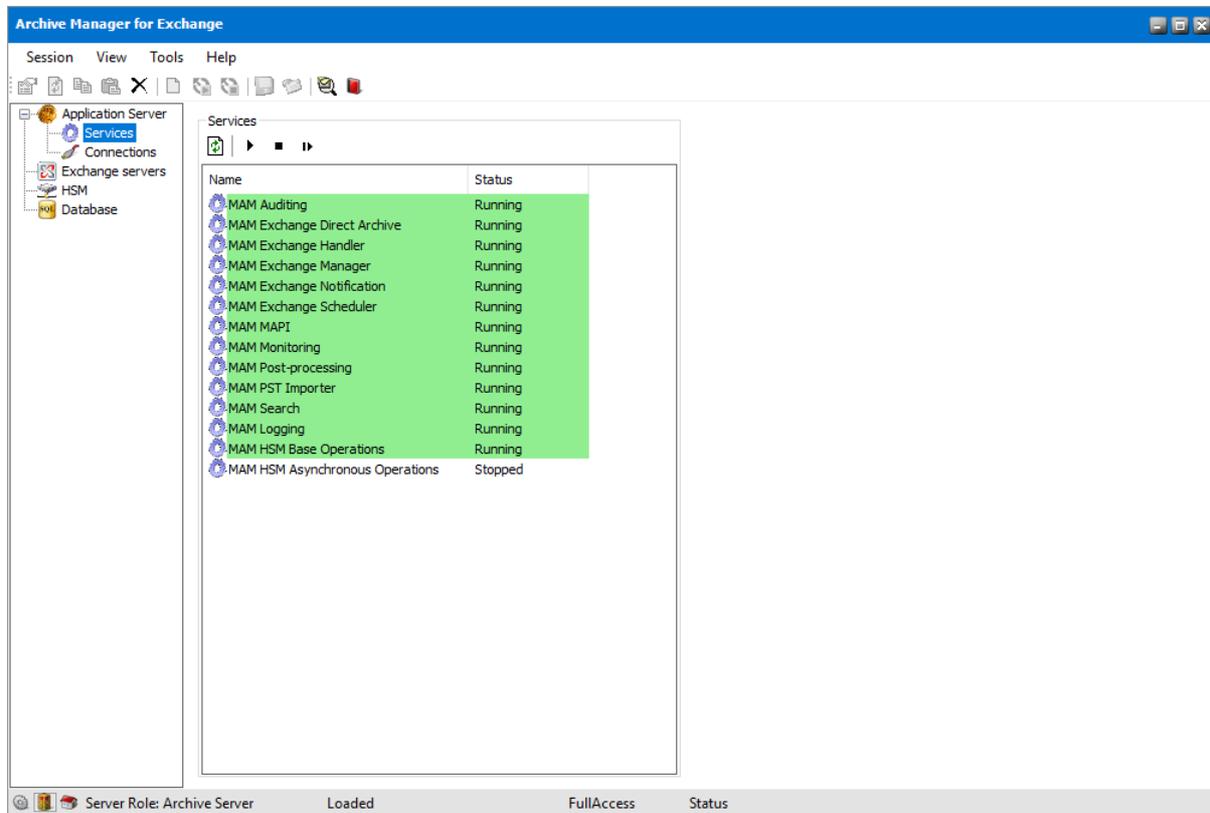
## Manager View

This is the default view. It is used to configure the automated archiving of mailbox user groups or public folders with jobs, scheduling jobs, configuring archive settings and manage the locations of several Archive Manager for Exchange servers in a distributed deployment. The image below displays the default **Groups** tab that helps you manage settings for various user groups. Notice that some groups are displayed in green. The green color indicates that the mailboxes of group members have been activated for automated archiving. For more information see [Manager view](#).



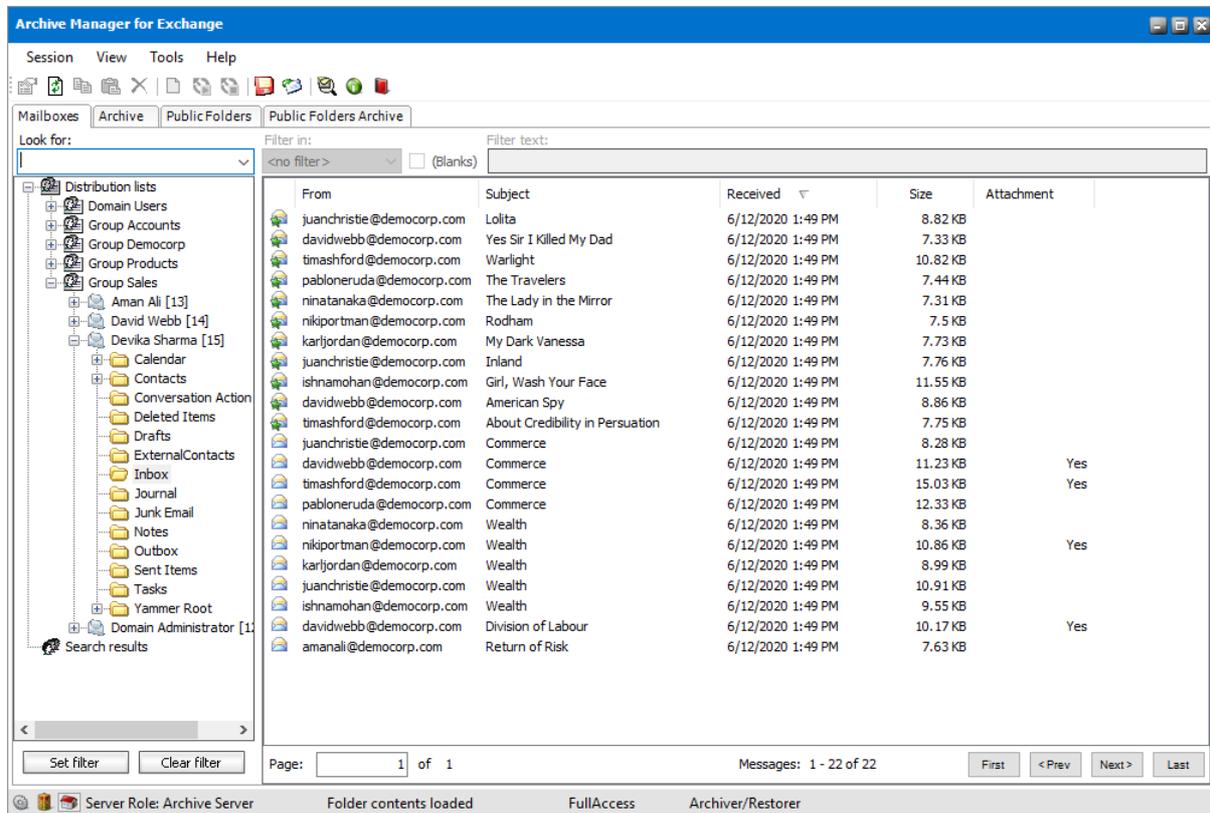
## Status View

The Status view displays information about the critical components of your deployment like the status of the Archive Manager for Exchange services, logged on users, the Hierarchical Storage Management (HSM) engine and the database. For more information see [Status view](#).



## Archive View

This view is reserved for manual archiving or restoration of mailbox and public folder items. When you restore email items, the original item and its versions are retrieved from the archive store and copied to the Microsoft Exchange server. For more information see [Archive view](#).



## Toolbar Icons

The toolbar provides set of smart icons for standard commands and functions. Smart icons are activated when you need to invoke a specific function in a specific view (e.g. **Manager** view, **Groups** tab, and others).



Image	Name	Description
	Properties	<p>If you want to check or define specific criteria for group archiving, just select the respective group on the <b>Groups</b> tab and click the <b>Properties</b> icon to open its <b>Properties</b> window. In the <b>Properties</b> window you may set your criteria on the respective <b>General</b>, <b>Scheduler</b>, <b>Folders</b>, <b>Classes</b> and the <b>Script</b> tabs. (See the section “Setting criteria for group archiving”)</p> <p>If you want to check or define specific criteria for public folders, just select the respective public folder on the <b>Public folders</b> tab in <b>Manager</b> view and click on the <b>Properties</b> icon to open its <b>Properties</b> window. In the Properties window that is displayed you may set your criteria on the respective <b>General</b>, <b>Scheduler</b>, <b>Classes</b>, and the <b>Script</b> tabs. (See the section “Public folders tab”)</p>
	Refresh	By clicking on this icon you will refresh the screen so that it is updated following the recently completed instruction.
	Copy settings	By using this icon you may easily copy one group or public folder settings.
	Paste settings	By using this icon you may easily paste one group or public folder copied settings to another.
	Remove	This icon can be used for instance for removing mailboxes or groups from full-text search on the <b>Settings</b> tab in <b>Manager</b> view. In general, it is used for removing objects from different tabs under the <b>Settings</b> tab in <b>Manager</b> view, or for removing objects from the <b>Jobs</b> tab.
	Create new job	Accessible from the <b>Jobs</b> tab in <b>Manager</b> view. By clicking on this icon you may create a new job simply by entering its specifications in the Job <b>Settings</b> window.

	Schedule job	Accessible from the <b>Jobs</b> tab in <b>Manager</b> view. When a job is stopped you may schedule it easily by clicking on the <b>Schedule job</b> icon.
	Stop job	Accessible from the <b>Jobs</b> tab in <b>Manager</b> view. When a job is scheduled you may stop it easily by clicking on the <b>Stop job</b> icon.
	Archive	Accessible on the <b>Mailboxes</b> tab as well as <b>Public folders</b> tab in <b>Archive</b> view. This icon is used for manual archiving of individual emails, groups, folders, mailboxes etc. Just select the desired item and click on the <b>Archive</b> icon on the toolbar. The <b>Archive options</b> window opens and you can select the retention category under which the chosen item will be archived.
	Restore	Accessible on the <b>Mailboxes</b> tab as well as <b>Public folders</b> tab in <b>Archive</b> view. This icon is used for the manual restoring of individual emails, groups, folders, mailboxes etc. Just select the desired item and click on the <b>Restore</b> icon on the toolbar. In the <b>Restorer options</b> window click on the <b>Accept</b> button. Archived mail will be restored and the respective shortcuts will be replaced with previous icons.
	Advanced search	Accessible in all three views. If you need to search for some information in the archive, simply use the Search in archive icon on the toolbar (see further).
	Show legend	Accessible in the <b>Archive</b> view. When you click this icon, the legend dialog pops up displaying all kinds of icons that you can see on the tabs of Archive view and the explanation for the icons.
	Address Book Manager	Opens the <b>Address Book Manager</b> which synchronizes servers, groups and mailboxes with Archive Manager for Exchange (see the section “Address book Manager”).

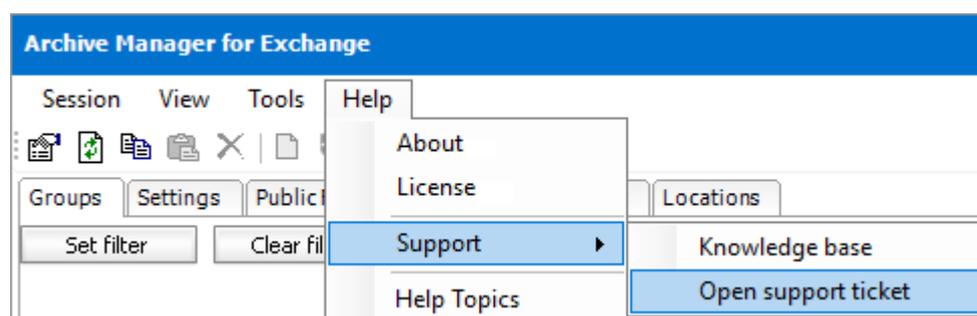
## Tools

This menu provides the administrative tools, options and settings to manage the application and preferences for the AMAC. The list of menu options are summarized below. For more information see [Tools, Options and Settings](#).

- **Mailbox Rights Manager** - manages user access rights for the ArchiveWeb feature. ArchiveWeb is used for viewing and working with archived emails over the internet and includes full-text searching. For more information see [Mailbox Rights Manager](#).
- **Check Mailboxes** - this command lets you check mailbox connections to the Microsoft Exchange Server. For more information see [Check Mailboxes](#).
- **Create folders** - this wizard helps you create Outlook folders for your users. For more information see [Create folders](#)
- **Export tasks** - manages the export of items from the result set of the advanced search in the AMAC or ArchiveWeb, to a mailbox or PST file. For more information on how to export found items see [Advanced Search](#).
- **Statistics** - helps the administrator get an overview of the number of items archived during specific hours, days, weeks, months, or years. For more information see [Statistics](#).
- **Address Book Manager** - manages the synchronization of your servers, groups, mailboxes and their permissions with the Active Directory. For more information see [Address Book Manager](#).
- **Options and Settings** - opens the configuration windows for configuring AMAC preferences. For more information see [Options](#) and [Settings](#).

## Help

The **Help** option on the menu bar provides access to different information dialogs and assistance features.



The options in this menu are described below:

- **About** – provides information about the current Archive Manager for Exchange version.
- **License** – provides information about your license, its limit and the expiration date.
- **Support** – provides a link to the **Knowledge base** articles on the Quest website. You can click the **Open support ticket** which directs you to the online support portal where you can submit a support request.

- **Help Topics** – opens the Metalogix Archive Manager for Exchange Administration Guide.

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# Tools, Options and Settings

This chapter describes the administration tools, options and settings to manage the application, synchronization and preferences for the AMAC.

- Administration Tools
  - [Mailbox Rights Manager](#)
  - [Check Mailboxes](#)
  - [Create folders](#)
  - [Export tasks](#)
  - [Statistics](#)
  - [Address Book Manager](#)
- [Options](#)
- [Settings](#)

## Mailbox Rights Manager

The Mailbox Rights Manager is a tool to manage the access rights for designated administrators of ArchiveWeb. Privileged users can use ArchiveWeb for viewing and working with archived emails over the internet and includes full-text searching. Archived mailboxes and folders are visible in ArchiveWeb even if the Microsoft Exchange Server or Office 365 is unavailable.

### **i** NOTE:

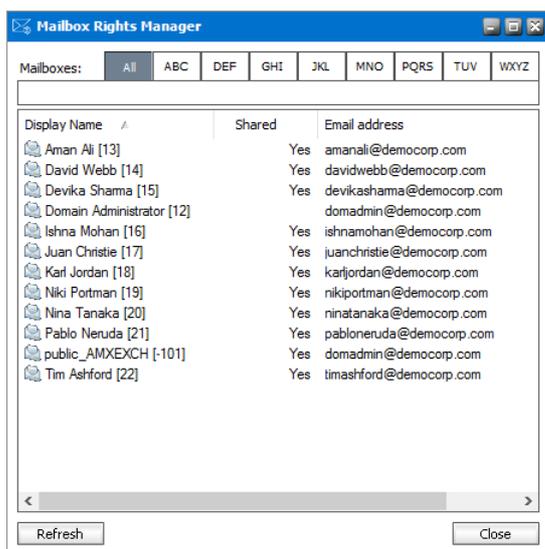
1. You must synchronize the mailboxes and folders before you use the Mailbox Rights Manager tool. This will ensure that mailbox and folder permissions are available and applicable to ArchiveWeb. For more information about synchronization see [Synchronizing Address Book Manager](#).
2. To manage rights with the Mailbox Rights Manager tool, the logged in user must have the **Modify Mailbox Permission** role set to **Allow**. User roles are assigned in the **Tools > Options > User Roles** tab.

## About Mailbox Rights Manager

1. From the **Tools** menu, click **Mailbox Rights Manager**. The *Mailbox Rights Manager* window opens.

- Click any tab to view the list of mailboxes by the preset alphabetical filter. The **All** tab is the default preset filter that returns all mailboxes  
or  
Enter the name of a mailbox in the search field below the tabs. You can also enter one or more letters to search for all mailboxes that contain the letters. Wildcards are not allowed.

**i** **NOTE:** The Mailbox Rights Manager for individual mailboxes can also be opened from the **Address Book Manager > Mailboxes** tab where you right-click the mailbox from the list view and select **Permissions**.

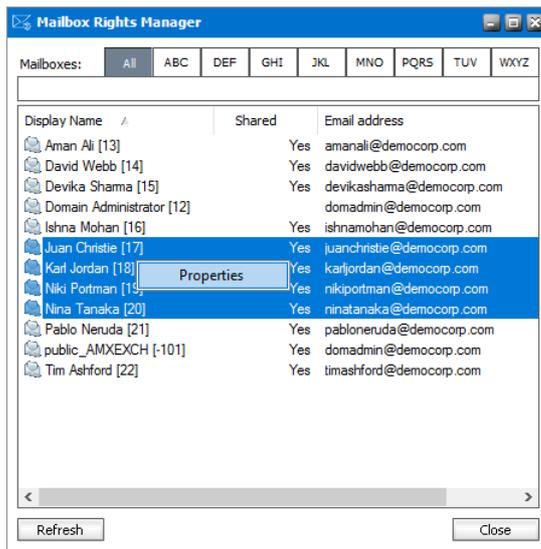


The list columns are described below:

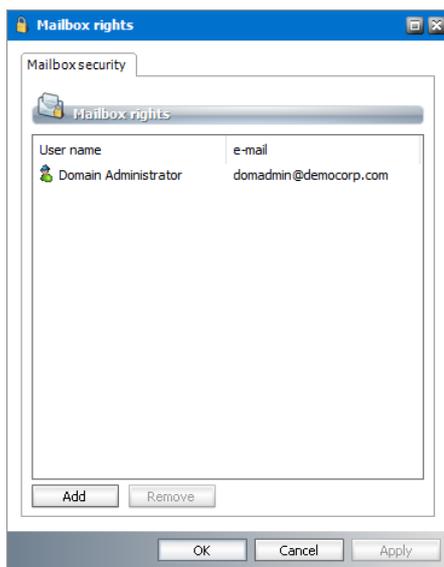
- Display Name** - the display name of the synchronized mailboxes available to the tool.
  - Shared** - indicates whether or not a listed mailbox is accessible to the logged in user. **Yes** indicates the logged in user has been granted rights to the mailbox. A blank value indicates the mailbox is either not shared or belongs to the logged in user. In the figure above, the logged in user is the domain administrator. Since the logged in user cannot assign access rights to their own mailbox, the value is blank.
  - Email address** - the email address of the synchronized mailbox.
- Click the **Refresh** button to reload the search result or click **Close** to exit the window.

## Steps to grant access rights to mailboxes

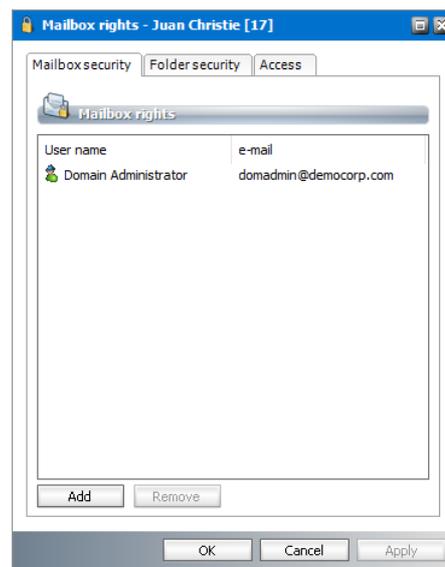
- Open the Mailbox Rights Manager.
- Locate one or more mailboxes that you want to share with the users through ArchiveWeb.
- Select a single mailbox or press **ctrl** on your keypad and select multiple mailboxes that you want to share.
- Right-click the selection and click **Properties** from the context menu.



- The *Mailbox Rights* window opens. If you selected multiple mailboxes, the *Mailbox Rights* window opens and displays the the **Mailbox security** tab. If you selected multiple mailboxes, you will see additional tabs that are explained later in this topic. To share the rights to mailboxes, only the **Mailbox security** tab is relevant. If the mailbox was previously shared, the list of all users who have the rights to the mailbox(es) will be listed.

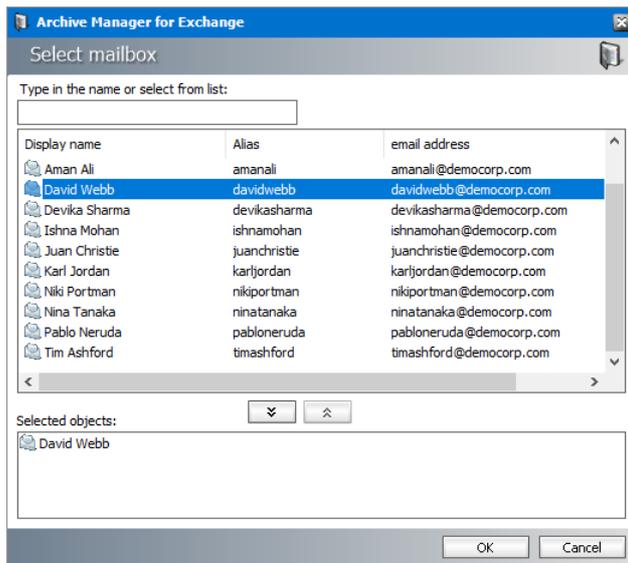


**Figure a.** Only the mailbox security tab appears when multiple mailboxes are selected

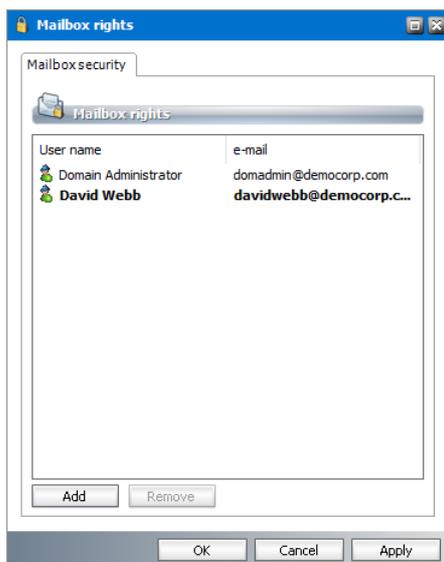


**Figure b.** Additional tabs appear when a single mailbox is selected

- To grant rights to additional users, click **Add**. The *Select mailbox* window opens.
- Select one or more users who will be granted the rights to the mailbox(es). Then click  to add the selected user(s) to the **Selected objects** list. To remove users from the **Selected objects** list, select one or more users from the **Selected objects** list and click  to move them back to the list of mailboxes. If you enter the name of a listed mailbox user directly in the search field and click **enter**, the mailbox user will be directly added to the **Selected objects** list.



8. Click **OK** to grant the rights to the users who are listed in the **Selected objects** list.
9. Verify that the additional users were granted the rights to share the selected mailbox(es). When mailboxes are shared using the Mailbox Rights Manager tool, the users that are granted the rights appear in bold font. If a mailbox was shared through permission settings in the Microsoft Exchange Server or Office 365, the users appear in normal font.

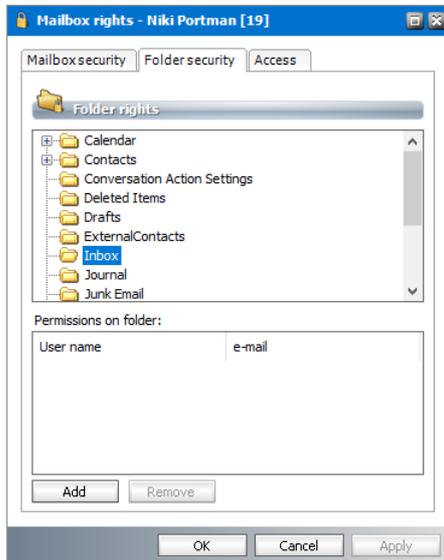


10. To revoke access rights to a mailbox, select a user from the *Mailbox rights* list and click **Remove**.
11. Click **OK** to close the window.

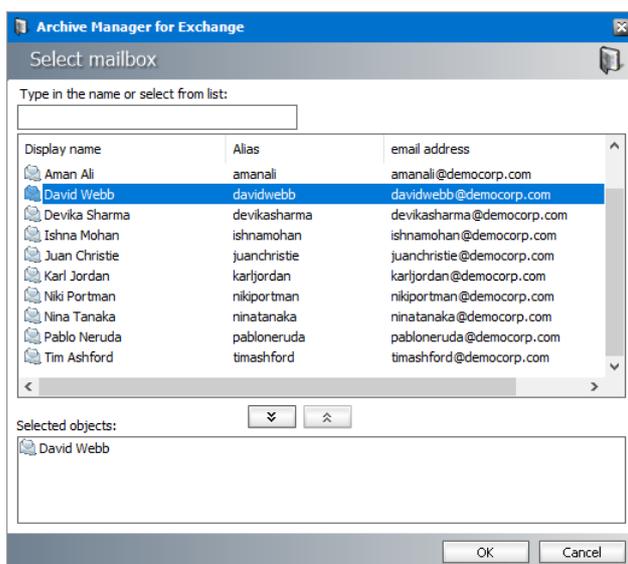
## Steps to grant access rights to mailbox folders

1. Open the Mailbox Rights Manager.
2. Locate the mailbox that you want to share with the users through ArchiveWeb.

3. Select a mailbox and right-click the selection. Then click **Properties** from the context menu. The *Mailbox Rights* window opens. The window title indicates the mailbox name and the mailbox identifier.
4. Click the **Folder security** tab.
5. Select the folder that you want to share with other users. Only one folder can be selected at a time.

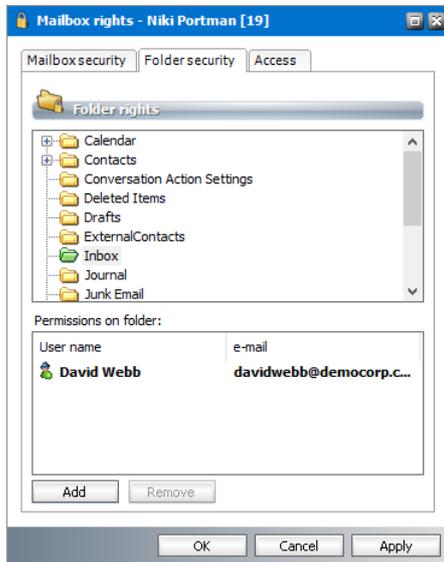


6. To grant rights to additional users, click **Add**. The *Select mailbox* window opens.
7. Select one or more users who will be granted the rights to the folder and click  to add the selected user(s) to the **Selected objects** list. To remove users from the **Selected objects** list, select one or more users from the **Selected objects** list and click  to move them back to the list of mailboxes. If you enter the name of a listed mailbox user directly in the search field and click **enter**, the mailbox user will be directly added to the **Selected objects** list.

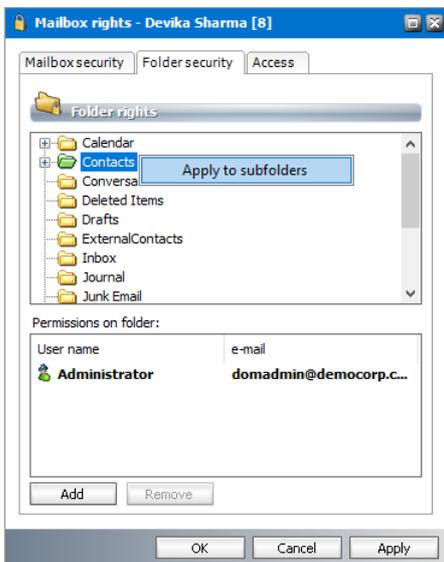


8. Click **OK** to grant the rights to the users who are listed in the **Selected objects** list.

- Verify that the additional users were granted the rights to share the selected folder. When a folder is shared using the Mailbox Rights Manager tool, the users that are granted the rights appear in bold font. If a folder was shared through permission settings in the Microsoft Exchange Server or Office 365, the users appear in normal font. The shared folder is indicated with a green folder icon.



- To grant the same permission to all subfolders, right-click the folder and click **Apply to subfolders** from the context menu.

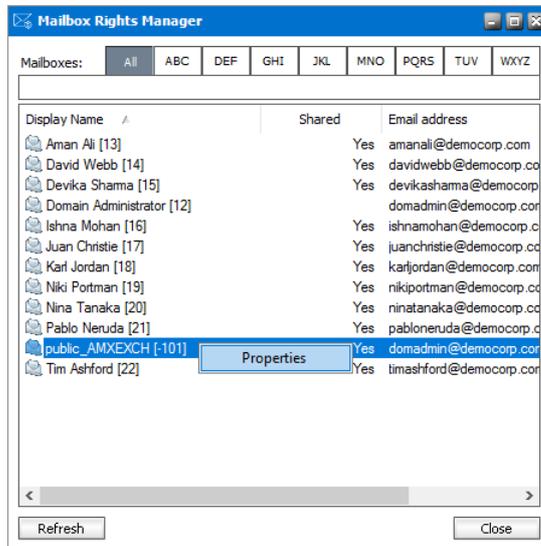


- Verify the result and click **OK** to close the window.

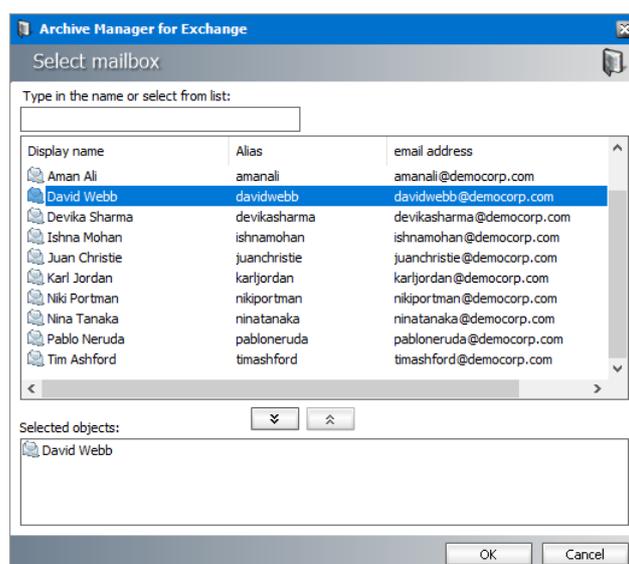
## Steps to grant access rights to public folders

- Open the Mailbox Rights Manager.
- Locate the public folder mailbox that contain the public folders you want to share with the users through ArchiveWeb.

3. Select the public folder mailbox and right-click the selection. Then click **Properties** from the context menu. The *Mailbox Rights* window opens. The window title indicates the mailbox name and the mailbox identifier.

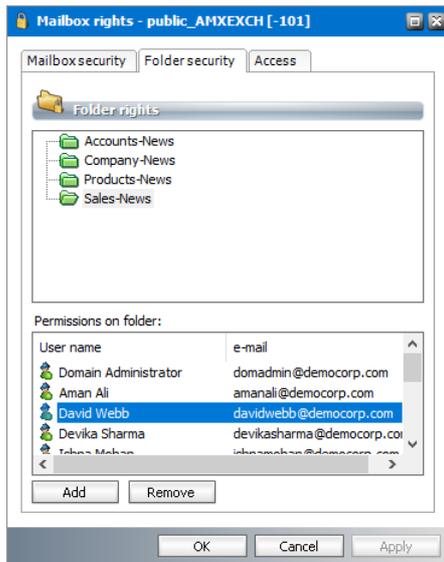


4. Click the **Folder security** tab.
5. Select the public folder that you want to share with other users. Only one folder can be selected at a time. A green icon indicates that a public folder has been shared.
6. To grant rights to additional users, click **Add**. The *Select mailbox* window opens.
7. Select one or more users who will be granted the rights to the mailbox(es) and click  to add the selected user(s) to the **Selected objects** list. To remove users from the **Selected objects** list, select one or more users from the **Selected objects** list and click  to move them back to the list of mailboxes. If you enter the name of a listed mailbox user directly in the search field and click **enter**, the mailbox user will be directly added to the **Selected objects** list.

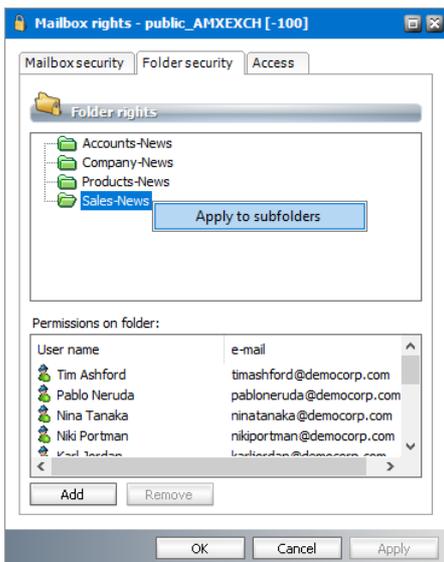


8. Click **OK** to grant the rights to the users who are listed in the **Selected objects** list.

- Verify that the additional users were granted the rights to share the selected folder.



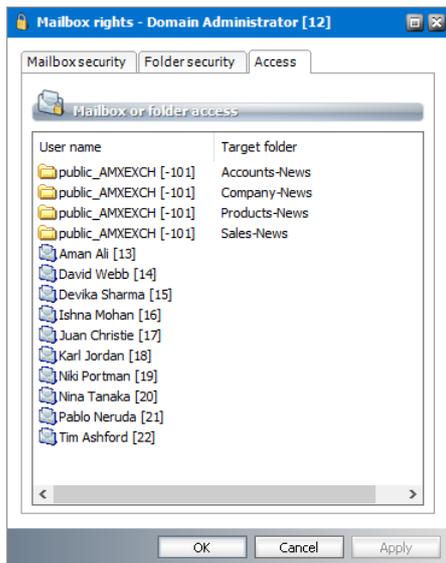
- To grant the same permission to all subfolders, right-click the folder and click **Apply to subfolders** from the context menu.



- Click **OK** to close the window.

## Steps to view the access rights of a user

- Open the Mailbox Rights Manager.
- Locate the user and right-click the selected mailbox. Then click **Properties** from the context menu. The *Mailbox Rights* window opens. The window title indicates the mailbox name and the mailbox identifier.
- Click the **Access** tab to view all the mailboxes and folders that are shared with this user.



4. Click **OK** to close the window. If you click **Cancel** the window closes and any changes you may have made in other tabs that were not saved will be rejected.

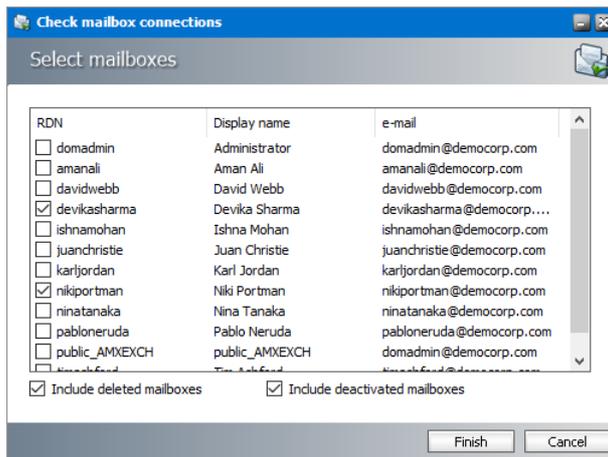
## Check Mailboxes

This tool checks the connection between mailboxes available in the AMAC and the Microsoft Exchange Server. Use this tool:

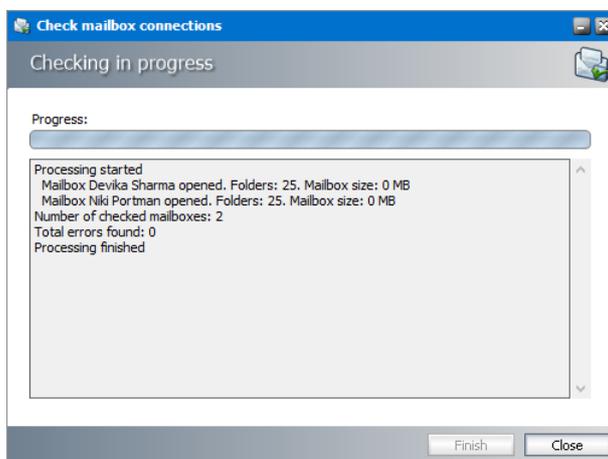
- After the first installation of Archive Manager for Exchange.
- After configuration changes on Microsoft Exchange Server, like a mailbox migration.

### Steps to use the Check Mailbox tool

1. From the Tools menu click Check mailboxes. The Check mailbox connections wizard opens. The list view displays mailboxes synchronized with Archive Manager for Exchange.
2. Select the check boxes below the list as described below:
  - **Include deleted mailboxes** to display the mailboxes that were deleted.
  - **Include deactivated mailboxes** to display the deactivated mailboxes.
3. Select the mailboxes for which you want to check the connection to Microsoft Exchange server.



4. Click **Finish** to start checking the mailbox connections. The *Checking in progress* window opens.



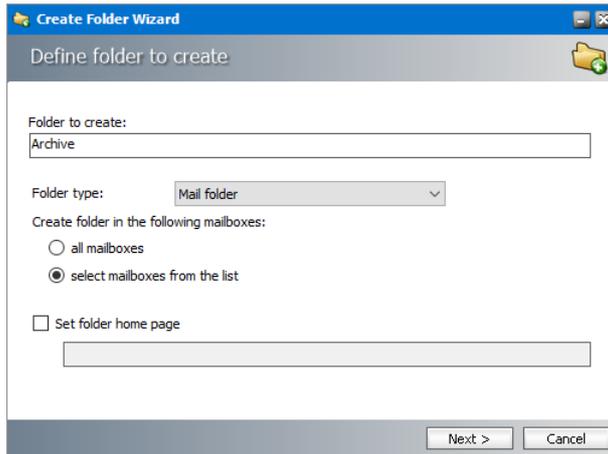
5. Verify the result and address any connection issues. Click **Close** to close the window.

## Create Folders

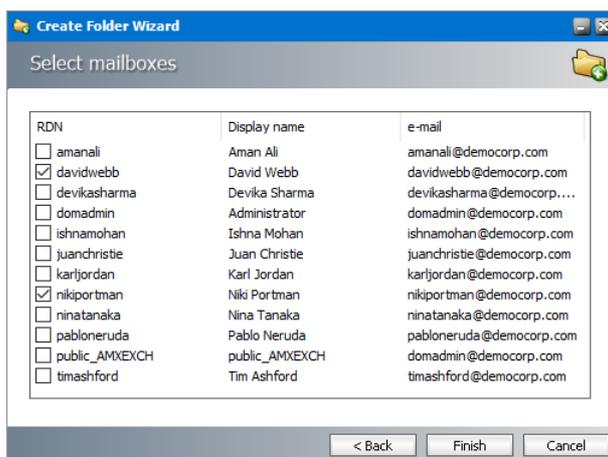
The Create Folders tool helps you create custom folders in MS Outlook for one or more users that are available in the Address Book Manager.

### Steps to create a folder in MS Outlook

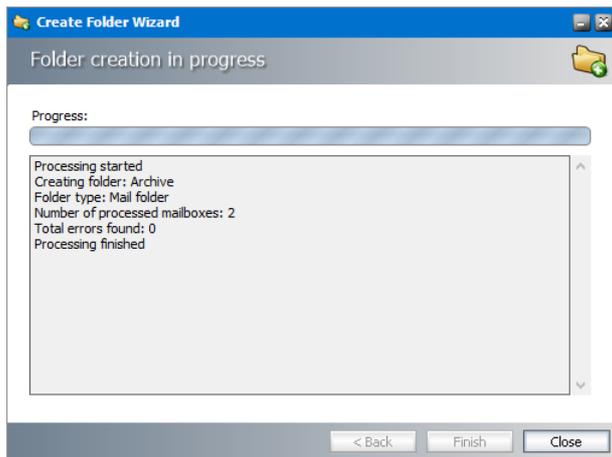
1. From the **Tools** menu click **Create Folders**. The *Create Folder Wizard* opens.



2. Specify the properties as described below:
  - a. **Folder to create** - specify the name of the folder to create. The default name is **Archive** and is specified as an an example.
  - b. **Folder Type** - specify the type from one of the standard types: **Mail, Calendar, Contact, Task, Notes** or **Journal**.
  - c. **Create folder in the following mailboxes**
    - **all mailboxes** - choose this option to create the folder in all user mailboxes.
    - **select mailbox from the list** - choose this option to select specific users from the user mailbox list available in Address Book Manager.
  - d. **Set folder home page** - Select the check box to set a home page for the created folder and then specify the URL for the home page. For example, the ArchiveWeb application can be made available to users in the folder.
3. Click **Next**. If you have selected the **select mailbox from the list** option, the *Select mailboxes* window opens.



4. Select the mailboxes where the folder will be created. Then click **Finish**. The Folder creation in progress window opens.



5. Verify the result and click **Close** to exit the tool.

## Export Tasks

When you save a search result to an XML file using the Advanced Search feature of the AMAC, the Export Tasks tool helps you to export the email items in the search result to another mailbox or a PST file.

In this topic:

- [About the export task list](#)
- [Create new task](#)
- [Start or stop a task](#)
- [Remove a task or refresh the task list](#)
- [Add documents to a task](#)
- [Remove documents from a task](#)
- [Change the properties of a task](#)

### About the export task list

1. From the **Tools** menu click **Export tasks**. The *Export Tasks* window opens.
2. The table lists all the existing tasks otherwise the table is blank.

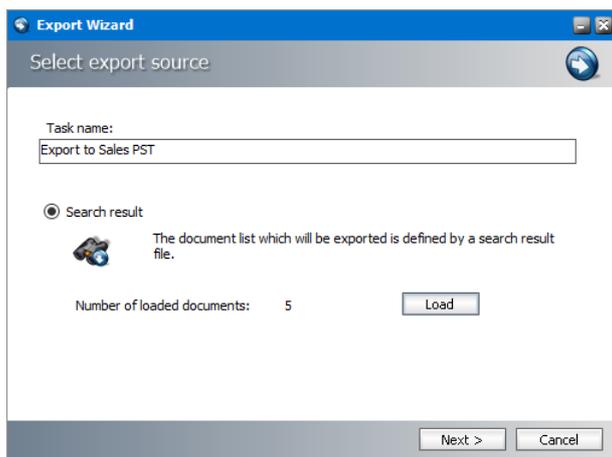
Type	Name	Status	Messages total	Processed messages	Success	Warning	Error
Export to mailbox	Export to private mailbox	Waiting	11	0	0	0	0
Export to mailbox	Export David's emails	Waiting	5	0	0	0	0
Export to mailbox	Export Devika's emails	Waiting	5	0	0	0	0
Export to mailbox	Export Ishna's emails	Waiting	5	0	0	0	0
Export to PST	Export to Accounts PST	Finished	5	5	5	0	0
Export to PST	Export to Product PST	Finished	5	5	5	0	0

The columns are as described below. The columns can be removed or added back when you right-click and choose **Add/remove** columns from the context menu. You can also click a column title to sort the rows in alphabetical order.

- a. **Type** - the task type. Valid values are **Export to mailbox** or **Export to PST**.
- b. **Name** - name of the task
- c. **Status** - the status of the task. Valid values are **Waiting**, **Finished**, **Processing**.
- d. **Messages total** - the number of email messages in the XML file that was attached to the task.
- e. **Processed messages** - the number of email messages that the tool attempted to export.
- f. **Success** - the number of email messages that were successfully exported.
- g. **Warning** - the number of email messages that were exported with some data issues.
- h. **Error** - the number of email messages that could not be exported.
- i. **Mailbox** - identifier of the mailbox where the data will be exported if the task type is **Export to mailbox**.
- j. **PST File** - path of the PST file where the data will be exported if the task type is **Export to PST**.
- k. **Folder** - folder path where the Task details are stored. For example, `C:\Program Files (x86)\Metalogix\MAM4Exchange\Export\`
- l. **Target Folder** - name of the root folder that will be created in the target mailbox or PST file.
- m. **Settings** - Number that indicates a unique combination of settings from the Export Tasks *Properties* window.
- n. **Last Error** - The most recent error that occurred when the export task runs. For example, it could be a global error that caused the export task to fail or an error specifically related to the most recent item in the export task.

## Steps to create a new task

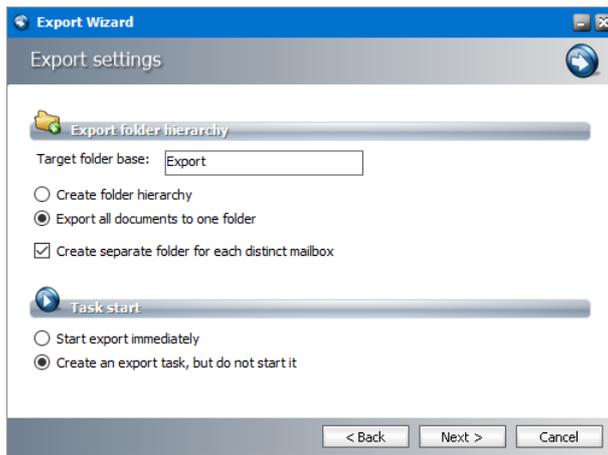
1. Right-click anywhere in the *Export Tasks* window and select **Create new task**. The *Select export source* window opens.
2. Enter a name for the task. We recommend that you use descriptive names to avoid confusion.
3. Click **Load**. The *Open Search Result File* window opens. Locate and select the XML file. Then click **Open**.
4. The file is attached to the task. Verify that the number of email messages indicated by the **Number of loaded documents** property is as expected.



5. Click **Next**. The *Select export destination* window opens.
6. Select **Export to mailbox** or **Export to PST**.



7. Click **Next**. The *Export settings* window opens.



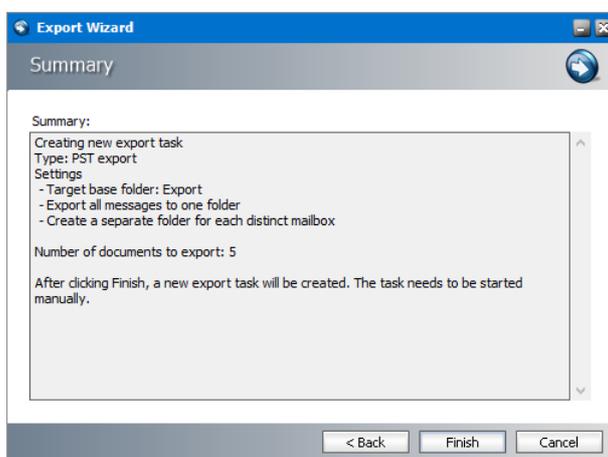
The properties in this window apply to both destinations: mailbox or PST, and are described below:

#### *Export folder hierarchy*

- a. **Target folder base** - name of the folder that will be created when email items are exported to a mailbox or PST file. Default value is **Export**.
- b. **Create folder hierarchy** - choosing this option creates a folder hierarchy as defined in the email being exported. For example, if the email is an inbox item, the email will be exported to the `Export\Inbox` folder.
- c. **Export all documents to one folder** - choosing this option exports the messages to the same root folder specified in the **Target folder base** property.
- d. **Create separate folder for each distinct mailbox** - Select this check box to create a sub-folder for each recipient mailbox that is specified in the message. For example if there are two messages in the source XML file that belong to different mailboxes like David Webb and

#### *Task start*

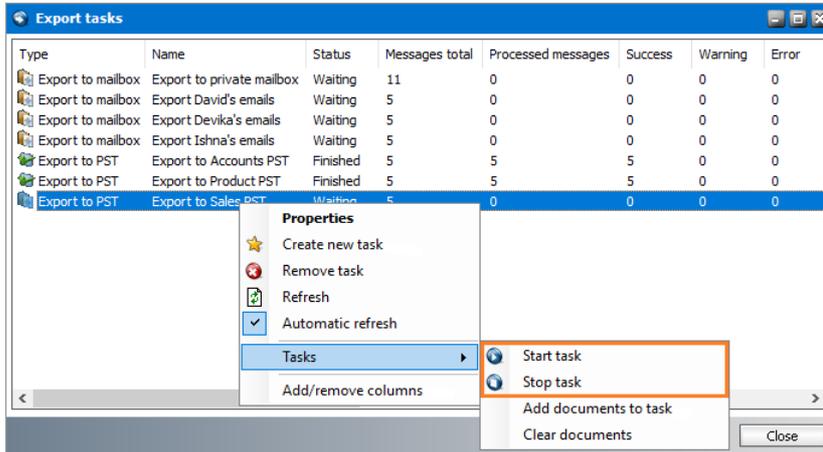
- e. **Start Export immediately** -
  - f. **Create and export task, but do not start it** -
8. Click **Next**. The *Summary* window opens.



- Verify the settings and click **Finish**. The new task appears in the task list of the *Export Tasks* window.

## Steps to start or stop a task

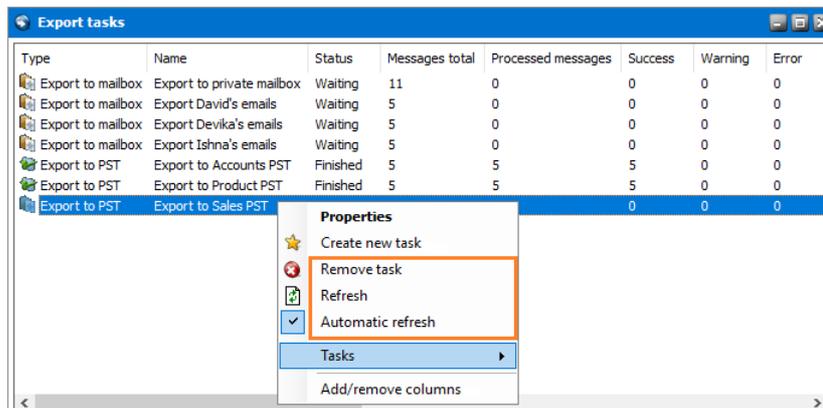
- Select a task from the task list of the *Export Tasks* window.
- Right-click the selected task to open the context menu.



- Click **Tasks** and then click **Start task** to start a task, or click **Stop task** to stop a task.

## Steps to remove a task or refresh the task list

- Select a task from the task list of the *Export Tasks* window.
- Right-click the selected task to open the context menu.



- Click **Remove task** to remove a task from the task list. Click **Yes** to confirm the removal.
- Choose between two options to refresh tasks:
  - Click **Refresh** to manually refresh the task list.
  - Right-click **Automatic refresh** to allow the application to refresh the task list every 15 seconds which is preferred for long task lists. After it is activated, you can right-click **Automatic refresh** again to deactivate it.

## Steps to add documents to a task

Adding documents to tasks lets you combine more XML source files in one export task. This is helpful when you need to perform two searches with different search criteria and generate separate XML files for each search result.

1. Select a task from the task list of the *Export Tasks* window.
2. Right-click the selected task to open the context menu.
3. Click **Tasks** and then click **Add documents to task**. The *Open Search Result File* window opens.
4. Locate and select the XML file. Then click **Open**.
5. The document is added to task. The **Messages total** column value for the task will increase. Verify that the total is as expected.

## Steps to remove documents from a task

1. Select a task from the task list of the *Export Tasks* window.
2. Right-click inside the window to open the context menu.
3. Click **Tasks** and then click **Clear Documents**.
4. Confirm that *all* documents will be removed from the task.
5. Verify that the **Messages total** column value for the task is 0.

## Steps to edit task properties

1. Select a task from the task list of the *Export Tasks* window.
2. Right-click inside the window and select **Properties** from the context menu. The *Properties* window opens.
  - a. **Export task** tab - allows you to view or change the name of the task and the export folder settings as described previously in this topic.
  - b. **Documents tab** – displays task statistics.
    - **Documents of task** - this section displays the statistics of the documents attached to the file.
    - **PST File Info** - in this section you can check the **Total PST** size and set the **Maximum size** of the PST file. By default size is 2 GB. You can limit the file size when exporting. If the exported amount exceeds this limit, a new file is created.

# Statistics

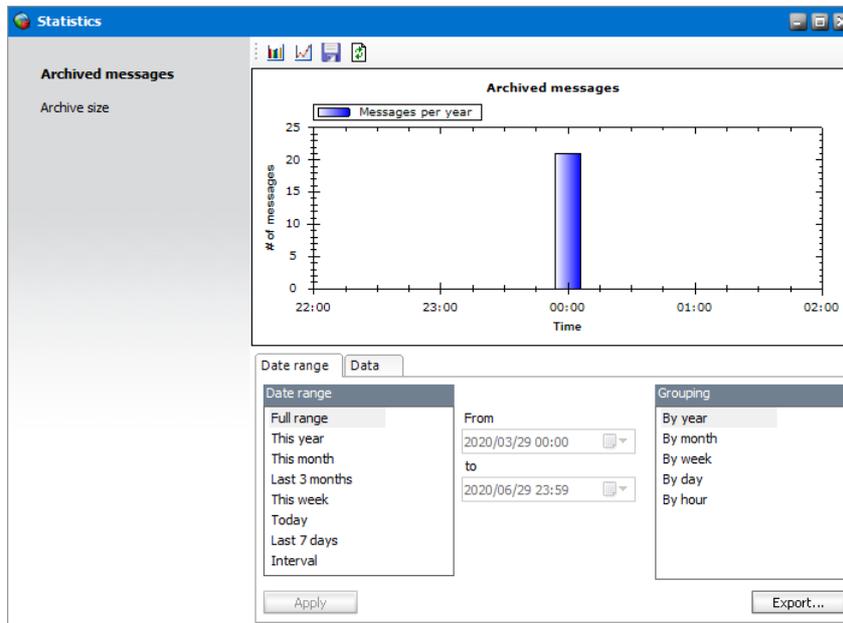
Statistics functionality helps the administrator get an overview of:

- number of items archived during a specific period (**Archived messages** view)
- size of individual mailboxes and their archive (**Archived size** view)

To display the statistic overview in **Archive Manager for Exchange**, click **Tools/Statistics** on the main menu. The Statistics window opens by default in the **Archived messages** view. Switch between views in the left pane of the window.

To get statistics on the number of archived messages, select the **Archived messages** view in the left pane. In the Date range section define the time period for which you want to generate the statistics. If you have selected “Interval”, specify the time span in the **From/to** text boxes (either overwrite the dates or click the down arrows to select desired days in the calendar).

As a next step sort the data by hours/days/weeks/months/years as you select the respective option in the Grouping section. Finally click **Apply**.



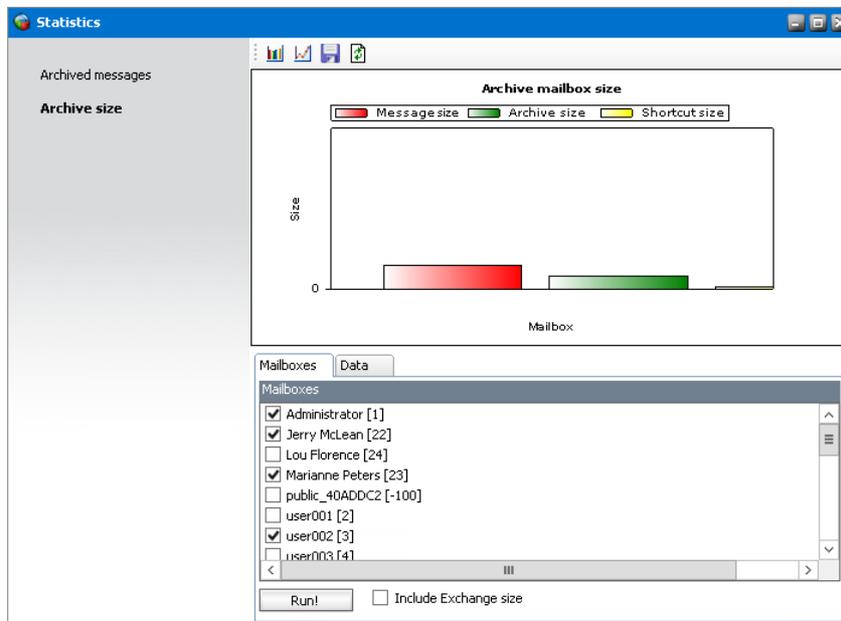
The statistical data for the chosen time period will be represented in the form of a graph and on the **Data** tab as a statistics table. To export the statistical data, click the **Export** button and then select the export folder.

**i TIP:** Use the icons in the upper bar of the **Statistics** window to switch between bar graph (  ) and line graph (  ).

It is also possible to zoom parts of the graph. Simply click inside the graph and draw the cursor to select the part which you want to zoom. To un-zoom, right-click inside the graph. In the context menu select **Un-Zoom**. The graph context menu offers also additional commands as Print, Save Image As etc.

To get an overview of individual mailboxes, their size of messages, archive, shortcuts etc. switch to the **Archive size** view in the left pane. On the **Mailboxes** tab check the mailboxes for which you want to generate the statistics and click **Run**.

**i** **NOTE:** If you check the **Include Exchange size** check box the report will contain a new column: current size of the mailbox on Microsoft Exchange. This helps you to report the size of the mailbox after archiving.



The statistical data for the chosen mailboxes will be represented in the form of a graph and on the **Data** tab as a statistics table. Colors in the graph represent the following:

- red – the size of all messages of the given mailbox
- green – the size of the mailbox in the HSM store, i.e. archive size
- yellow – the shortcut size, i.e. the size of shortcuts left in the Microsoft Exchange server

**i** **NOTE:** Overview reports for mailboxes can be created also in the **Manager** view on the **Settings /Archive size report** tab. The Export wizard on that tab offers advanced functionality. The report can be exported and adjusted to the administrator’s needs (see the “Archive size report” section in the “Settings tab” chapter).

## Address Book Manager

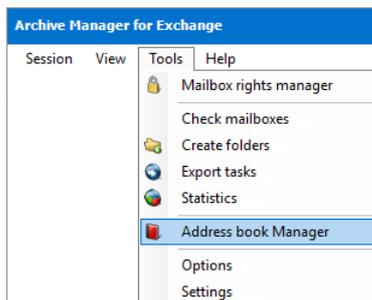
Active Directory forest and domains store information about Microsoft Exchange servers, mailboxes, and other Microsoft Exchange-related objects in your organization. The Address Book Manager helps you to manage the Microsoft Exchange servers, mailboxes and groups which are imported into Address Book Manager and keep them in synch to facilitate email archiving. You can schedule automatic synchronization to keep the Metalogix Archive Manager for Exchange database up to date and synchronized with the Active Directory.

In this topic:

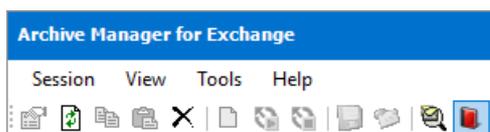
- [Steps to open the Address Book Manager](#)
- [About the Address Book Manager](#)
- [Importing Microsoft Exchange Servers](#)
- [Importing Mailboxes](#)
- [Importing or Creating Groups](#)
- [Synchronizing Address Book Manager](#)
- [Managing Servers](#)
- [Managing Groups](#)
- [Managing Mailboxes](#)

## Steps to open the Address Book Manager

1. Log in to the Metalogix Archive Manager for Exchange console.
2. From the **Tools** menu, click **Address Book Manager**



or, click the **Address Book Manager** icon from the toolbar.



3. If no Microsoft Exchange servers, mailboxes or groups are available in the Address Book Manager, the *Address Book Setup wizard* appears. Otherwise the Address Book Manager window opens.

## About the Address Book Manager

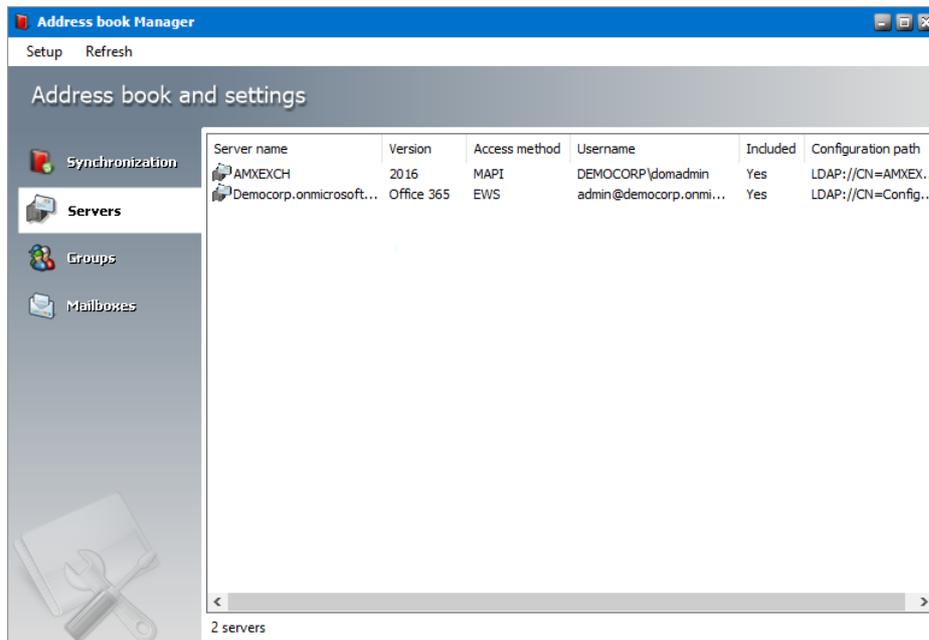
The Address Book Manager window provides two menu options:

**Setup** - starts the *Address Book Setup wizard* that provides a step-by-step guide to add Microsoft Exchange servers, mailboxes and groups. If no Microsoft Exchange servers, mailboxes or groups are available in the Address Book Manager, the *Address Book Setup wizard* appears by default when you open the Address Book Manager.

**Refresh** - reloads information about Microsoft Exchange servers, mailboxes and groups based on the available configuration settings.

The management of Microsoft Exchange servers, mailboxes, groups and synchronization settings are organized by tabs in the Address Book Manager window.

- **Synchronization** – for manual or automatic synchronization of mailboxes, groups and permissions with the Active Directory of available servers.
- **Servers** – for adding, removing and managing Microsoft Exchange servers.
- **Groups** – for importing groups, creating user-defined groups and managing group features.
- **Mailboxes** – for importing new mailboxes and managing mailboxes.



## Importing Microsoft Exchange Servers

In this topic:

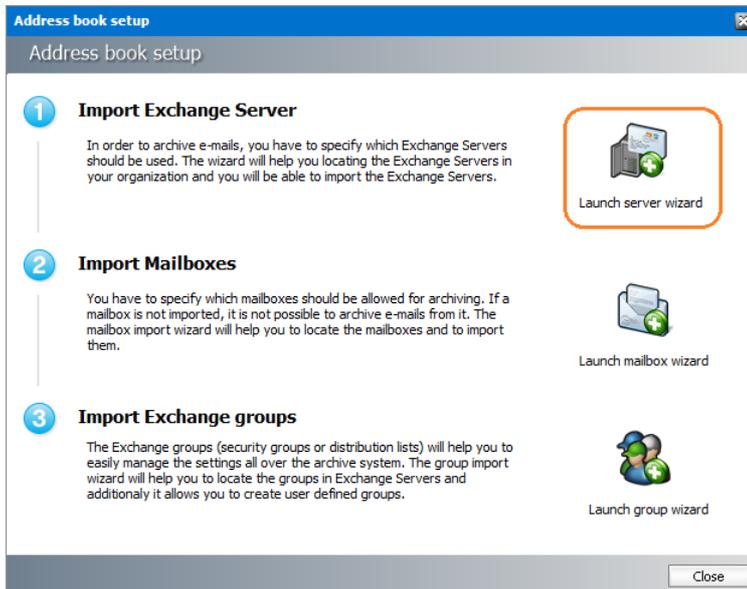
- [Options for importing Microsoft Exchange servers](#)
- [Steps to add on-premise Microsoft Exchange servers](#)
- [Steps to add online Microsoft Exchange servers](#)
- [Steps to verify the imported Microsoft Exchange servers](#)

## Options for importing Microsoft Exchange servers

Microsoft Exchange Servers can be added to the Address Book Manager in one of two ways:

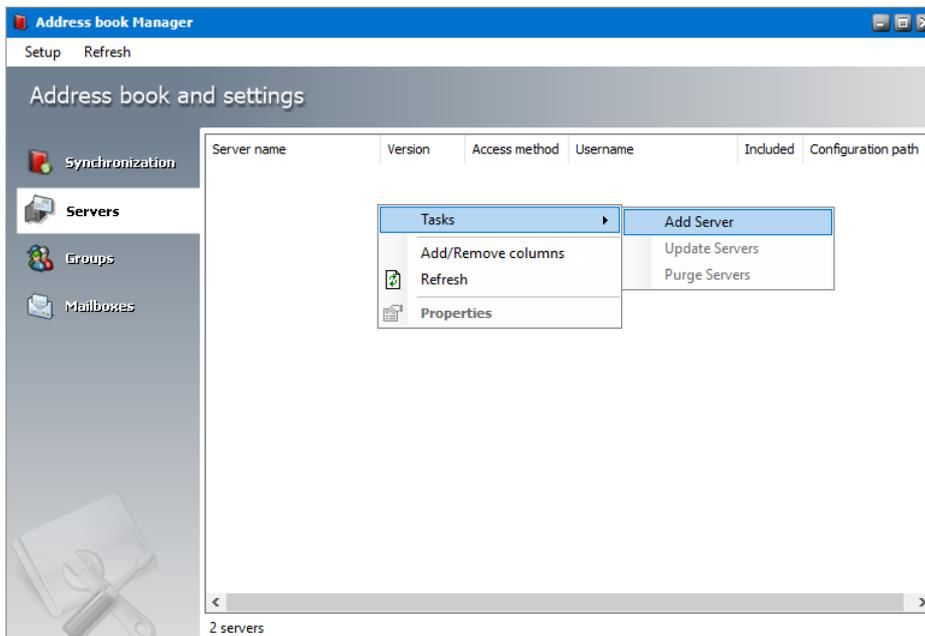
- **Option 1** - By using the Address Book Setup Wizard.

1. Open the Address Book Manager.
2. From the **Setup** menu, click **Setup Wizard**. The *Address book setup wizard* appears.
3. Click the **Launch server wizard** to initiate the import process.



- **Option 2** - By starting a task from the **Servers** tab of the **Address Book Manager**.

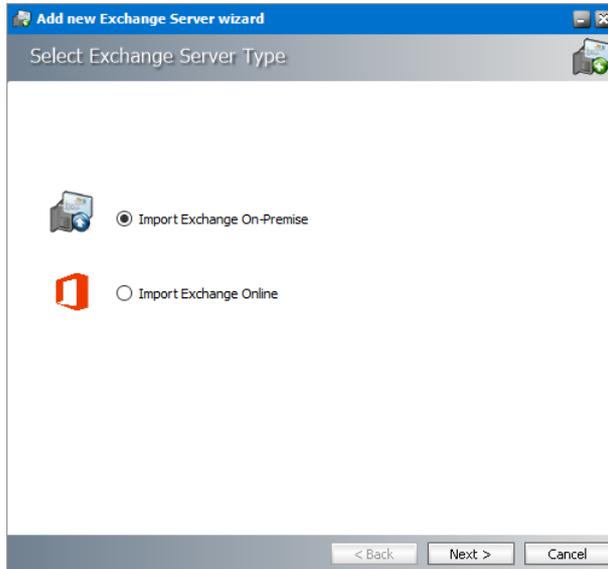
1. Open the Address Book Manager.
2. Click the **Servers** tab.
3. Right-click inside the list view and from the context menu point to **Tasks** and select **Add Server...** to initiate the import process.



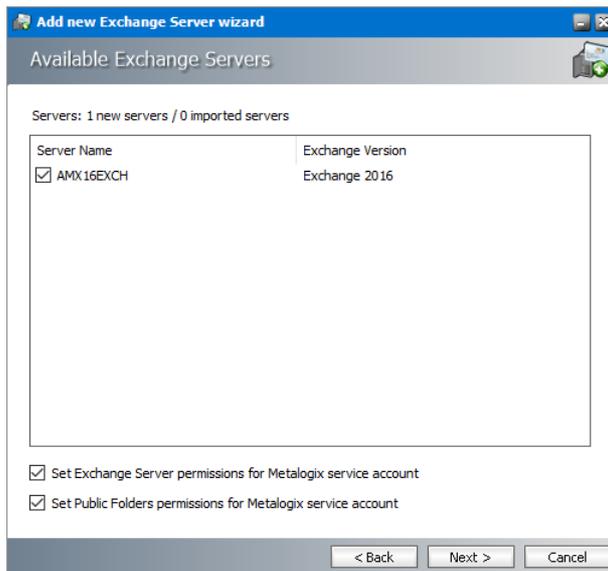
Whichever method you choose, the *Select Exchange Server Type* window opens.

# Steps to add on-premise Microsoft Exchange servers

1. In the *Select Exchange Server Type* window, select **Import Exchange On-Premise**.



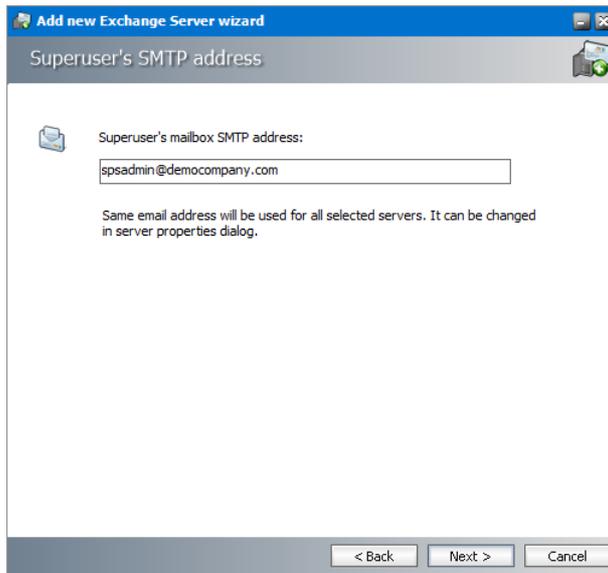
2. Click **Next**. A list of Microsoft Exchange Servers appear that are accessible within your trusted domain.



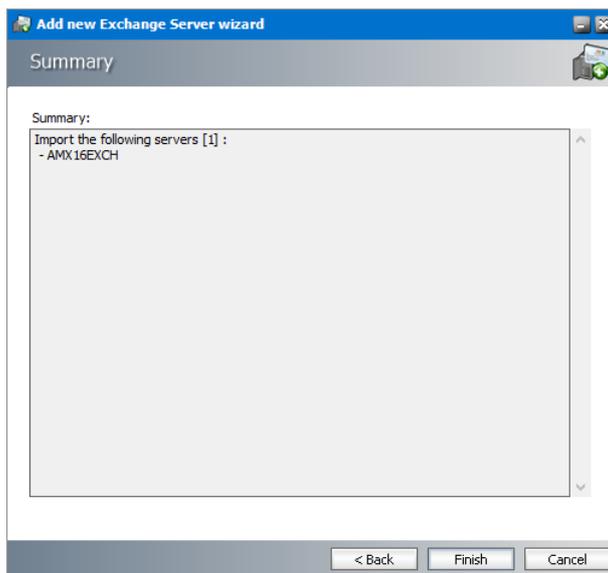
Select the servers that contain the mailboxes and folders you want to archive and then select the check boxes to set the permissions as described below:

- a. **Set Exchange server permissions for Metalogix service account** - grants elevated rights to the superuser on each of the selected Microsoft Exchange Servers.
  - b. **Set Public Folder permissions for Metalogix service account** - grants OWNER permission to the Public folders.
3. Click **Next**. The *Superuser's mailbox SMTP address* window opens.

4. In the **Superuser's mailbox SMTP address** field, enter the email address of the superuser if not already filled in. You can change the email from the server **Properties** window.

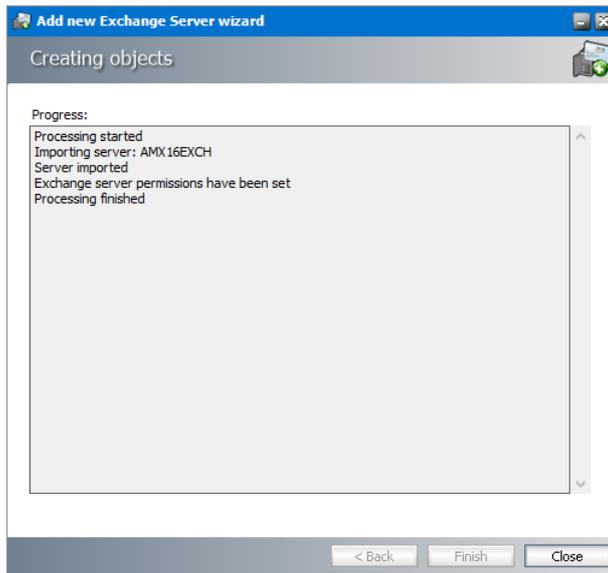


5. Click **Next**. The **Summary** window opens that lists the on-premise servers that will be added.



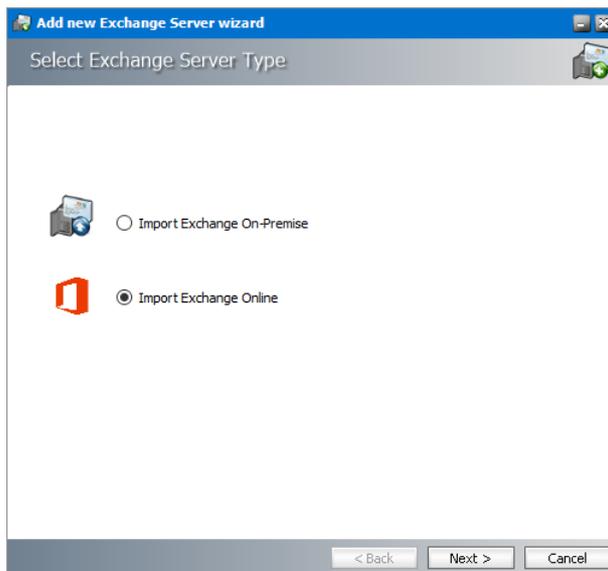
6. Click **Finish** to start the import process. The *Creating objects* window opens. You can click **Back** to select more servers to add or remove some of the selected servers.

7. When the import process has completed, click **Close**.



## Steps to add online Microsoft Exchange servers

1. In the *Select Exchange Server Type* window, select **Import Exchange Online**.



2. Click **Next**. The *Service account for O365 Exchange server import* window opens.

3. Enter the administrator credentials for the Microsoft Exchange online server.

The screenshot shows a Windows dialog box titled "Add new Exchange Server wizard" with the subtitle "Superuser for Exchange server online". It contains two text input fields: "Username:" with the value "administrator@democompany.onmicrosoft.com" and "Password:" with a masked password "\*\*\*\*\*". At the bottom, there are three buttons: "< Back", "Next >", and "Cancel".

4. Click **Next**. The *Available Exchange Servers* window opens. Select the desired Office 365 instance. You can click **Back** to select more servers to add or remove some of the selected servers.

The screenshot shows the "Available Exchange Servers" step of the wizard. It displays "Servers: 1 new servers / 0 imported servers". A table lists the available servers:

Server Name	Exchange Version
<input checked="" type="checkbox"/> democompany.onmicrosoft.com	Office 365

Below the table, there are two checked checkboxes:

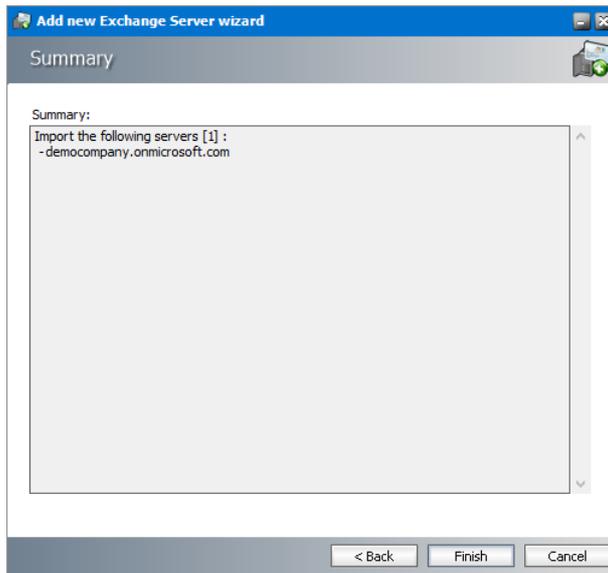
- Set Exchange Server permissions for democompany.onmicrosoft.com
- Set Public Folders permissions for democompany.onmicrosoft.com

At the bottom, there are three buttons: "< Back", "Next >", and "Cancel".

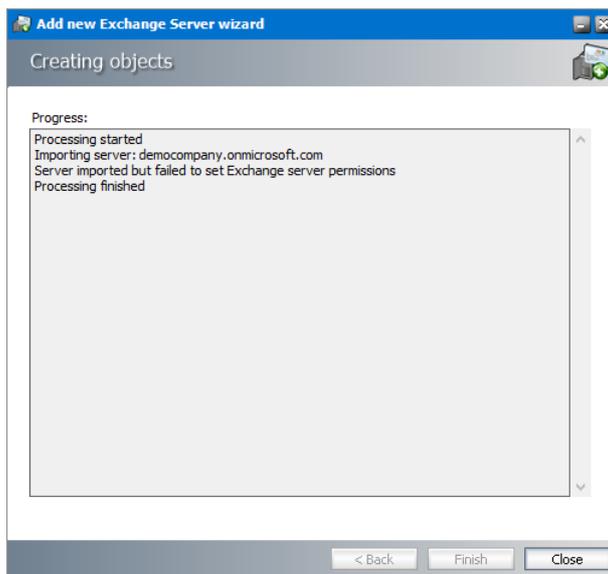
Select the servers that contain the mailboxes and folders you want to archive and then select the check boxes to set the permissions as described below:

- c. **Set Exchange server permissions for <Exchange server online superuser>** - grants elevated rights to the Exchange server online *superuser* on each of the selected servers.
- d. **Set Public Folder permissions for <Exchange server online superuser>** - grants OWNER permission for the Public folders to the Exchange server online *superuser*.

5. Click **Next**. The *Summary* window opens that lists the online Microsoft Exchange servers that will be added.

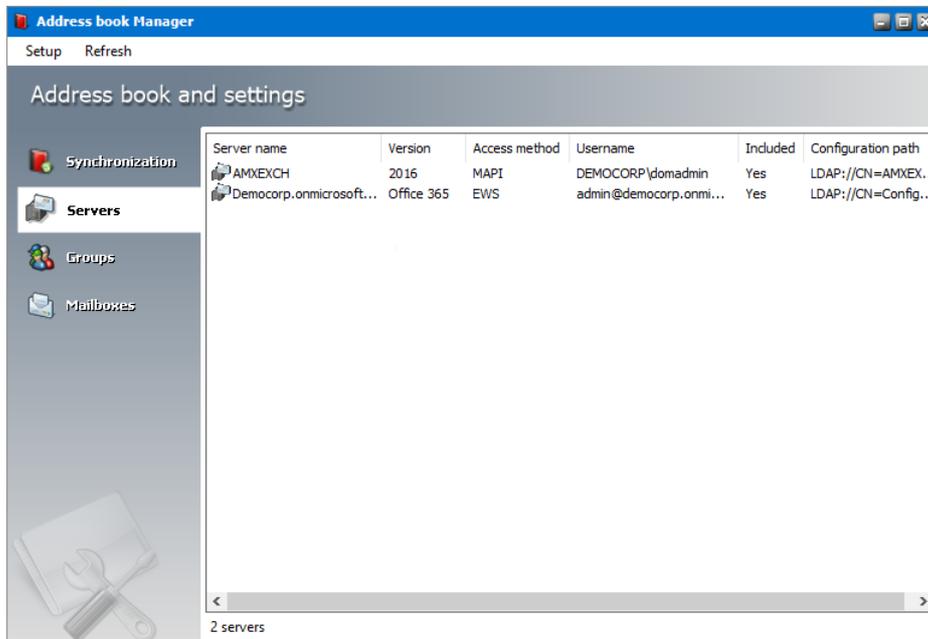


6. Click **Finish** to start the import process. The *Creating object* window opens.
7. When the import process has completed, click **Close**.



# Steps to verify the imported Microsoft Exchange servers

1. Open the Address Book Manager
2. Click the **Servers** tab and verify the imported servers in the list view.



## Importing Mailboxes

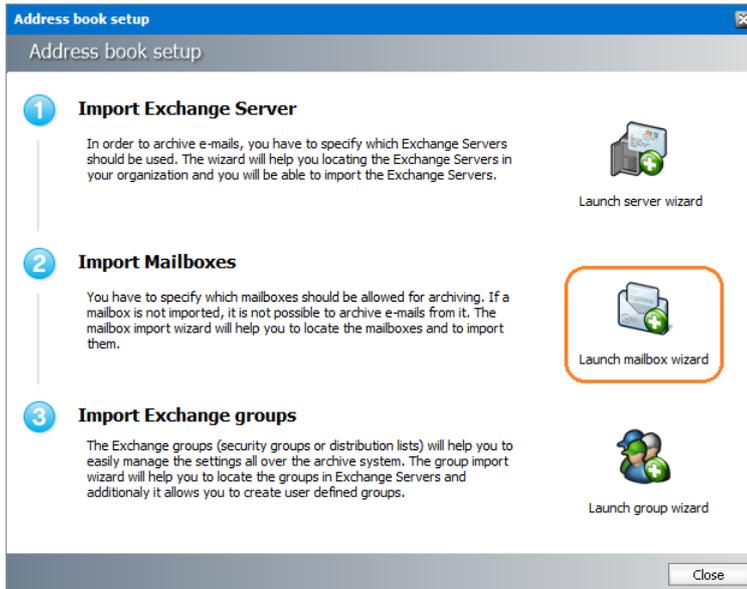
In this topic:

- [Options for importing mailboxes](#)
- [Steps to import mailboxes from on-premise Microsoft Exchange servers](#)
- [Steps to import mailboxes from online Microsoft Exchange servers](#)
- [Steps to verify the imported mailboxes](#)

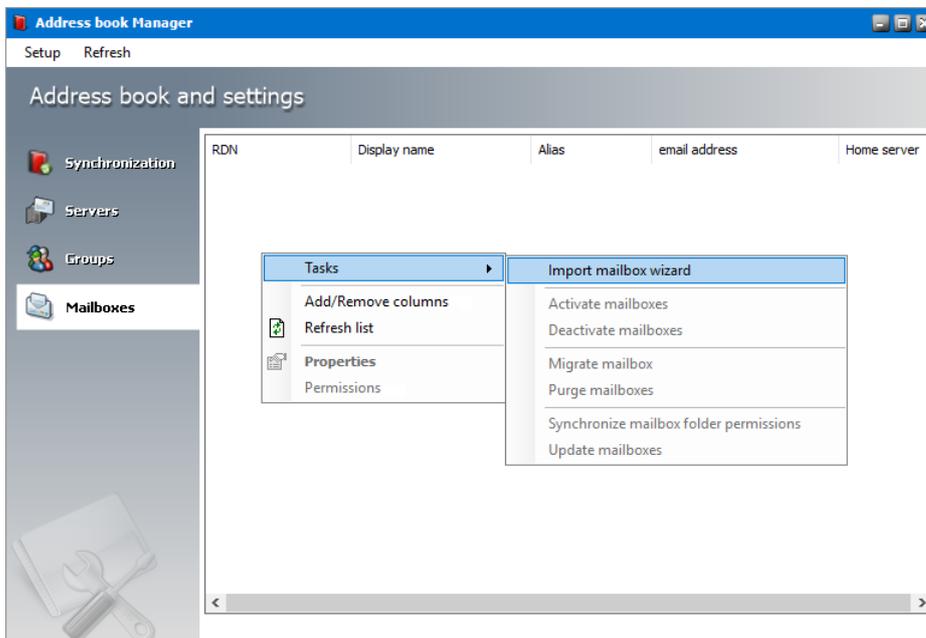
## Options for importing mailboxes

Microsoft Exchange server mailboxes can be added to the Address Book Manager in one of two ways:

- By using the Address Book Setup Wizard.
  1. Open the Address Book Manager.
  2. From the **Setup** menu, click **Setup Wizard**. The *Address book Setup wizard* appears.
  3. Click the **Launch mailbox wizard** to initiate the import process.



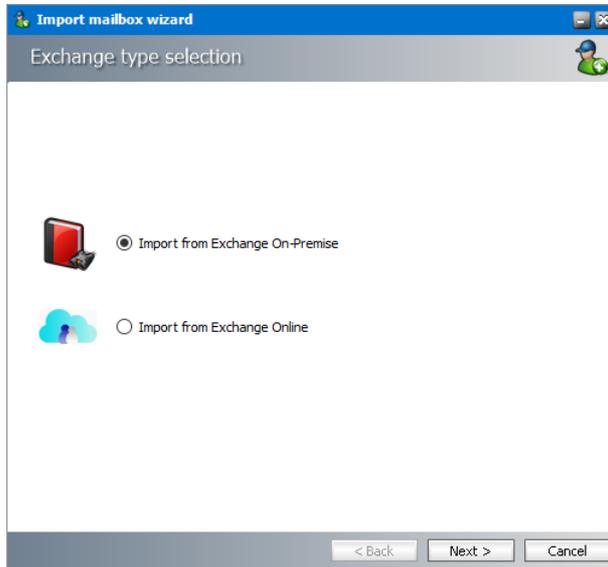
- By using the **Mailboxes** tab of the **Address Book Manager**.
  1. Open the Address Book Manager.
  2. Click the **Mailboxes** tab.
  3. Right-click inside the list view and from the context menu point to **Tasks** and select **Import mailbox wizard...** to initiate the import process.



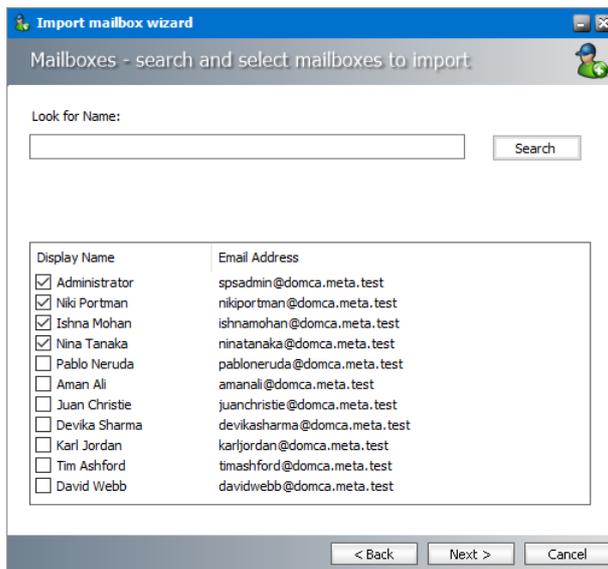
Whichever method you choose, the *Import mailbox wizard* window opens.

# Steps to import mailboxes from an on-premise Microsoft Exchange Server

1. In the *Select Exchange Server Type* window, select **Import from Exchange On-Premise**.



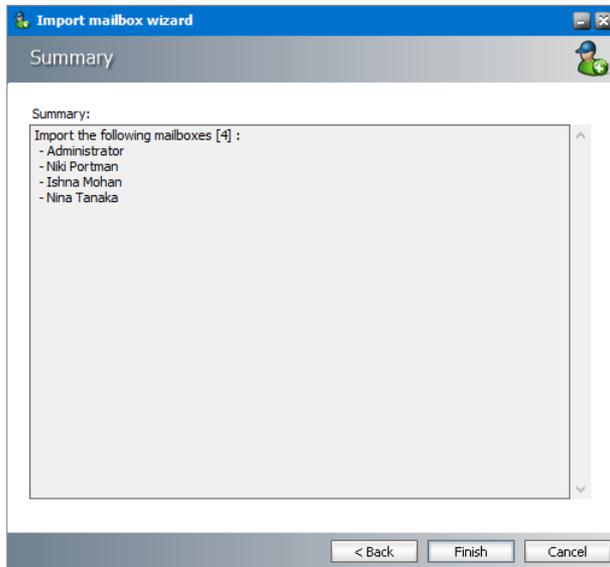
2. Click **Next**. The *Mailboxes - search and select mailboxes to import* window opens.



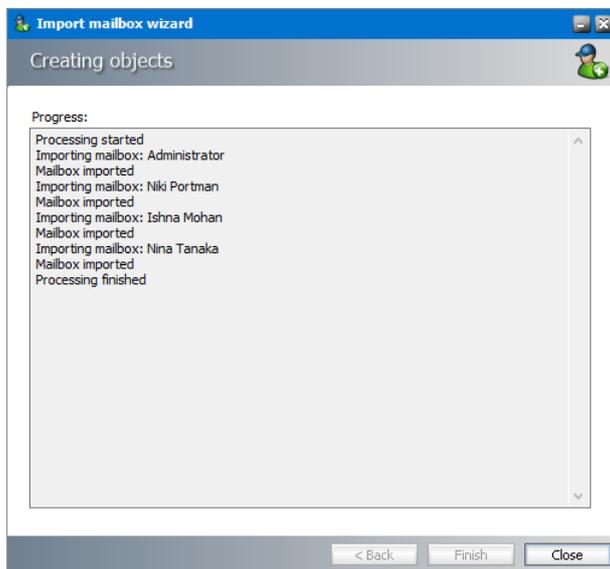
3. Click **Search** to return the list of all mailboxes across all on-premise servers available to the Address Book Manager. To reduce the list of mailboxes, you can specify a search term in the **Look for Name** search box. Only the initial letters of the mailbox *Display Name* can be specified, and wildcards are not supported. The search term is case-insensitive. For example, if you enter **ni** as the search term and click **Search**, the mailboxes that start with the letters **ni** will be returned in the search results list.
4. Select one or more mailboxes that you want to import.

**i** **NOTE:** Mailboxes that are highlighted indicate that they already exist in the Address Book Manager. The list summary above the list of mailboxes will indicate how many mailboxes that you select are new, and how many already exist. If you select pre-existing mailboxes, they will be updated during the import process.

5. Click **Next**. The *Summary* window opens that lists the mailboxes from the on-premise Microsoft Exchange servers that will be imported.



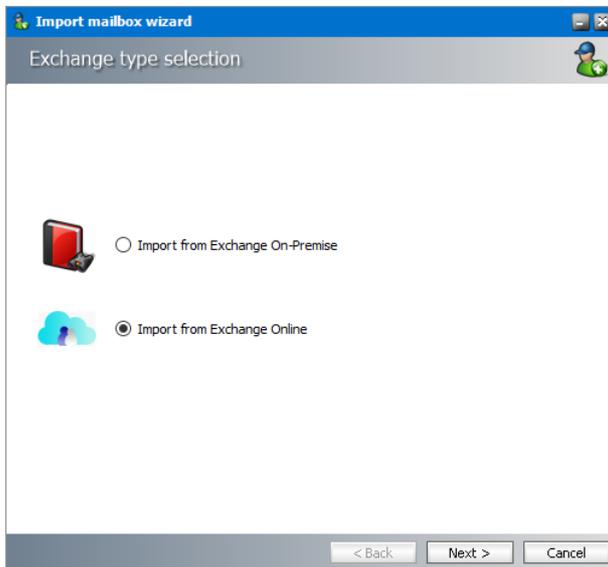
6. Click **Finish** to start the import process. The *Creating Object* window opens. You can click **Back** to select more mailboxes to add or remove some of the selected mailboxes.



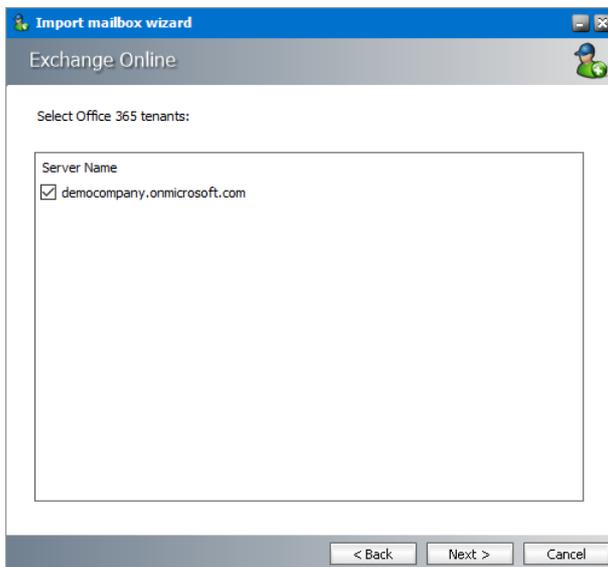
7. When the import process has completed, click **Close**.

# Steps to import mailboxes from an online Microsoft Exchange Server

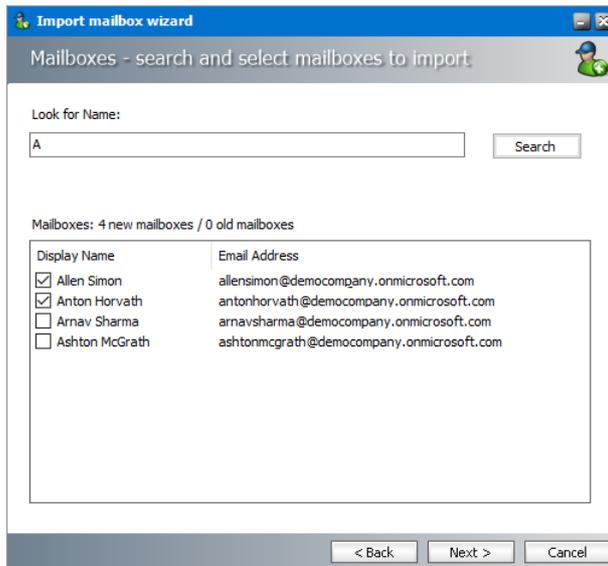
1. In the *Select Exchange Server Type* window, select **Import from Exchange Online**.



2. Click **Next**. The *Exchange Online* window opens. Select the desired Office 365 instance.



3. Click **Next**. The *Mailboxes - search and select mailboxes to import* window opens.

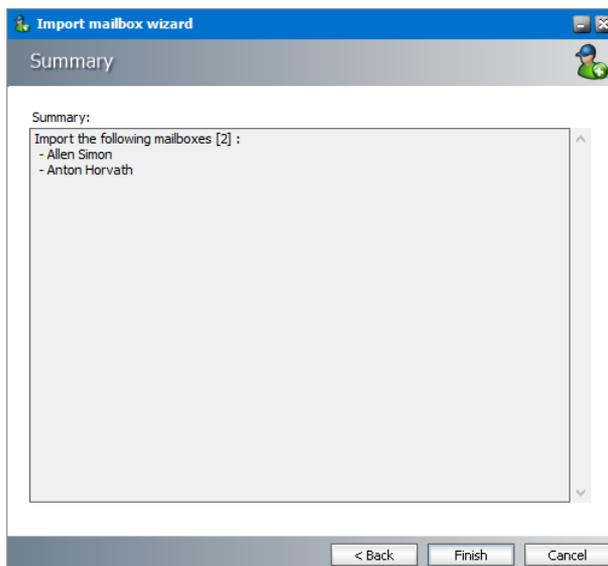


4. Click **Search** to return the list of all mailboxes across all on-premise servers available to the Address Book Manager. To reduce the list of mailboxes, you can specify a search term in the **Look for Name** search box. Only the initial letters of the mailbox *Display Name* can be specified, and wildcards are not supported. The search term is case-insensitive. For example, if you enter **A** as the search term and click **Search**, the mailboxes *that start with the letter A* will be returned in the search results list.

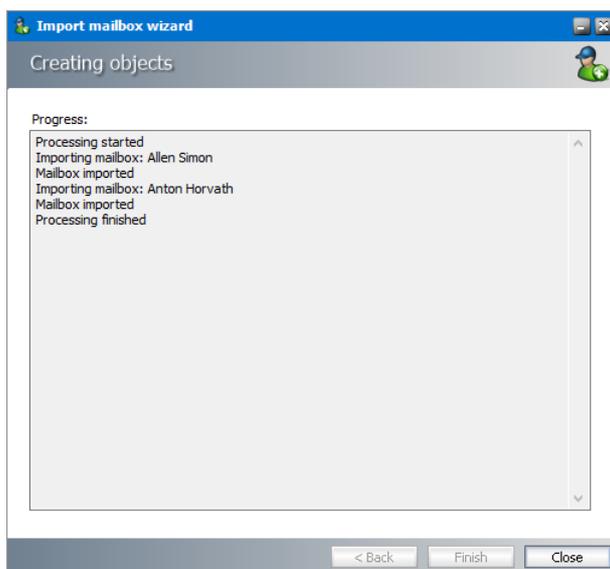
5. Select one or more mailboxes that you want to import.

**i** **NOTE:** Mailboxes that are highlighted indicate that they already exist in the Address Book Manager. The list summary above the list of mailboxes will indicate how many mailboxes that you select are new, and how many already exist. If you select pre-existing mailboxes, they will be updated during the import process.

6. Click **Next**. The **Summary** window opens that lists the online Microsoft Exchange servers that will be added.



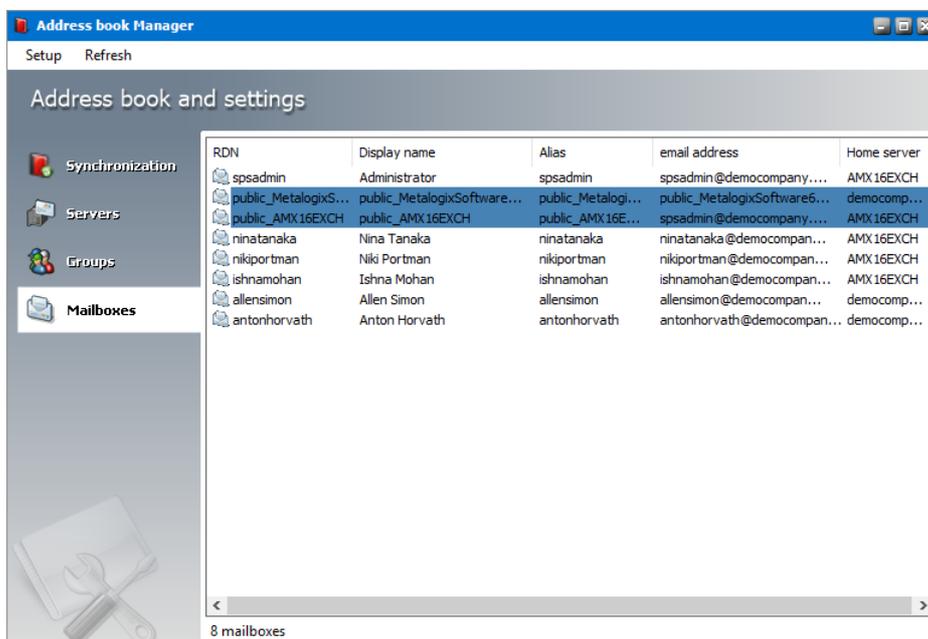
- Click **Finish** to start the import process. The *Creating Object* window opens. You can click **Back** to select more mailboxes to add or remove some of the selected mailboxes.



- When the import process has completed, click **Close**.

## Steps to verify the imported mailboxes

- Open the Address Book Manager
- Click the **Mailboxes** tab and verify the imported mailboxes in the list view.



**i** **NOTE:** In the mailboxes list you will also see mailboxes names *public\_<name-of-Microsoft-Exchange-server>*. These mailboxes are the public folders from the respective Microsoft Exchange server because Address Book Manager considers a public folder as a profile. These mailboxes are always highlighted in blue ■, so you can distinguish them faster.

**i** | **NOTE:** Imported mailboxes must be added to a group in Address Book Manager to activate automatic archiving with scheduled jobs. If you do not add mailboxes to a group you can archive them manually. For more information about adding mailboxes to groups see the section “How to add members to a user defined Archive Manager group”.

## Importing or Creating Groups

Groups activate you to schedule archiving jobs. There must be at least one group (either imported from Active Directory or a user-defined group) if you plan to schedule archiving jobs. User-defined groups are not Active Directory groups.

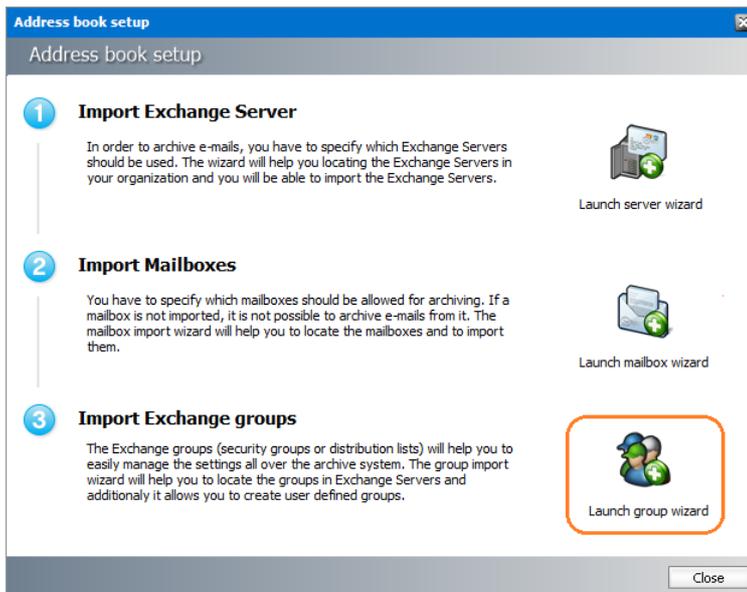
In this topic:

- [Options for importing groups](#)
- [Steps to import groups from on-premise Microsoft Exchange servers](#)
- [Steps to import groups from online Microsoft Exchange servers](#)
- [Steps to create user-defined groups](#)
- [Steps to verify the imported groups](#)

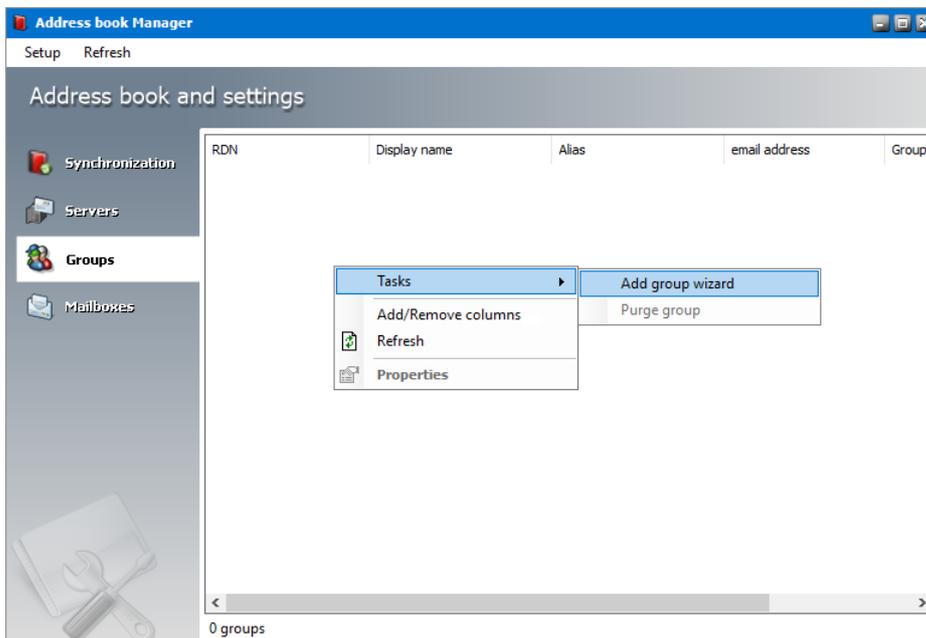
## Options for importing groups

Microsoft Exchange server groups can be added to the Address Book Manager in one of two ways:

- By using the Address Book Setup Wizard.
  1. Open the Address Book Manager.
  2. From the **Setup** menu, click **Setup Wizard**. The *Address book Setup wizard* appears.
  3. Click the **Launch group wizard** to initiate the import process.



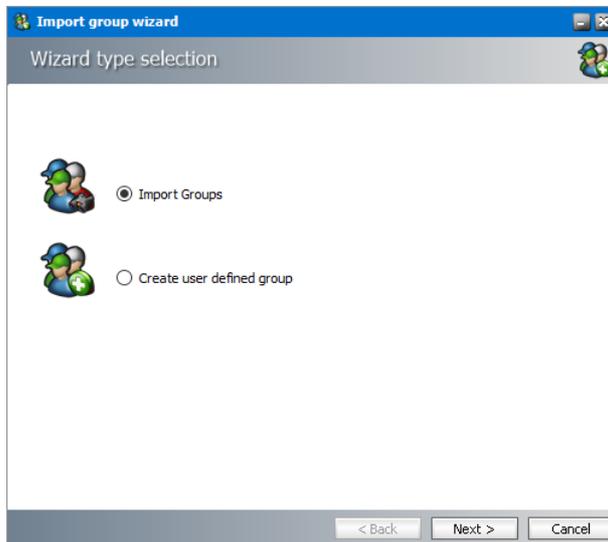
- By using the **Groups** tab of the **Address Book Manager**.
  1. Open the Address Book Manager.
  2. Click the **Groups** tab.
  3. Right-click inside the list view and from the context menu point to **Tasks** and select **Add group wizard...** to initiate the import process.



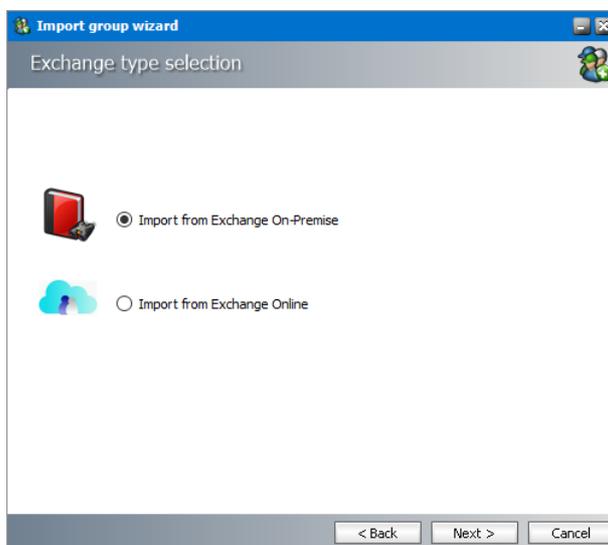
Whichever method you choose, the *Import group wizard* window opens.

# Steps to import groups from an on-premise Microsoft Exchange Server

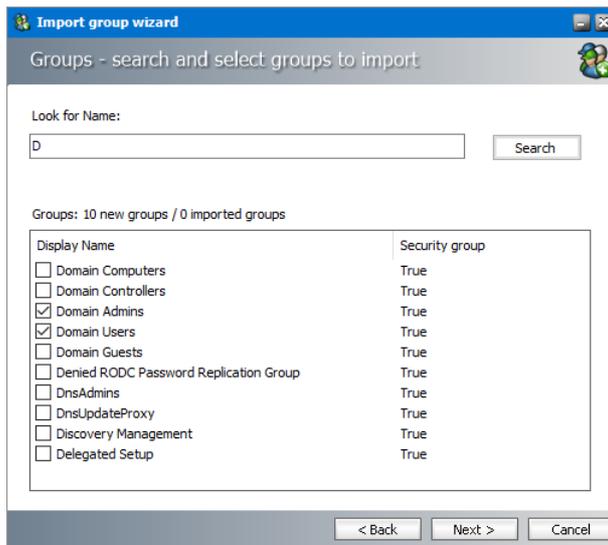
1. In the *Import group wizard* window, select **Import Groups**.



2. Click **Next**. The *Exchange type selection* window opens. Select **Import form Exchange On-Premise**.



3. Click **Next**. The *Groups - search and select groups to import* window opens.

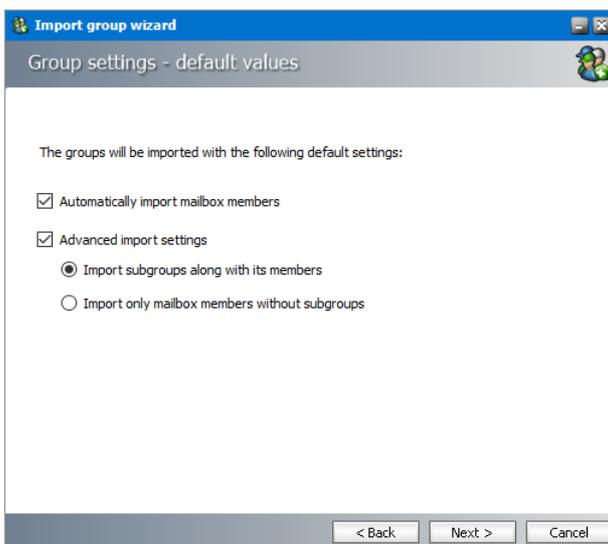


4. Click **Search** to return the list of all groups across all on-premise servers available to the Address Book Manager. To reduce the list of groups, you can specify a search term in the **Look for Name** search box. Only the initial letters of the groups **Display Name** can be specified, and wildcards are not supported. The search term is case-insensitive. For example, if you enter **D** as the search term and click **Search**, the groups that start with the letter **D** will be returned in the search results list.

5. Select one or more groups that you want to import.

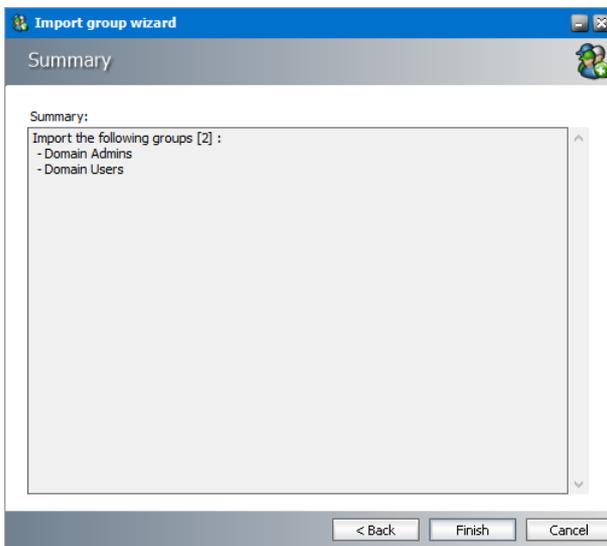
**i** **NOTE:** Groups that are highlighted indicate that they already exist in the Address Book Manager. The list summary above the list of groups will indicate how many groups that you select are new, and how many already exist. If you select preexisting groups, all new mailboxes will also be imported.

6. Click **Next**. The *Group settings - default values* window opens.

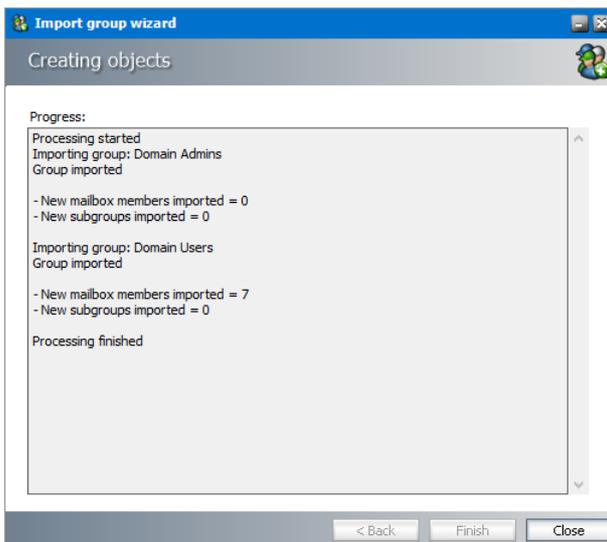


7. Specify the settings which will be applied when the groups are imported now or synchronized in future with the Address Book Manager automatically or manually. The settings are described below:

- a. **Automatically import mailbox members** - check this box to import all Active Directory accounts with a mailbox that are members of this group.
  - b. **Advanced import settings** - check this box if you intend to import subgroups and subgroup mailbox members. You can activate this setting only if you select the **Automatically import mailbox members** setting.
  - c. **Import subgroups along with members** - check this box to import existing subgroups of selected groups including its member mailboxes. This is the default setting.
  - d. **Import only mailbox members without subgroups** - check this box to import only member mailboxes from subgroups. These mailboxes will be added to mailboxes in the parent group in the Address Book Manager.
8. Click **Next**. The *Summary* window opens that lists the groups that will be added.



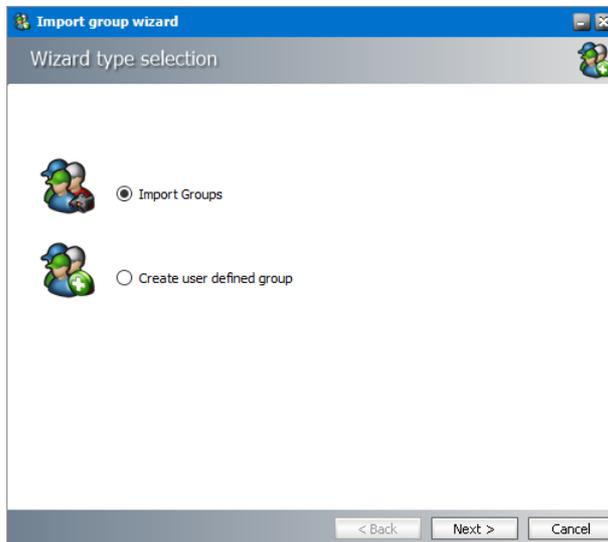
9. Click **Finish** to start the import process. The *Creating Object* window opens.



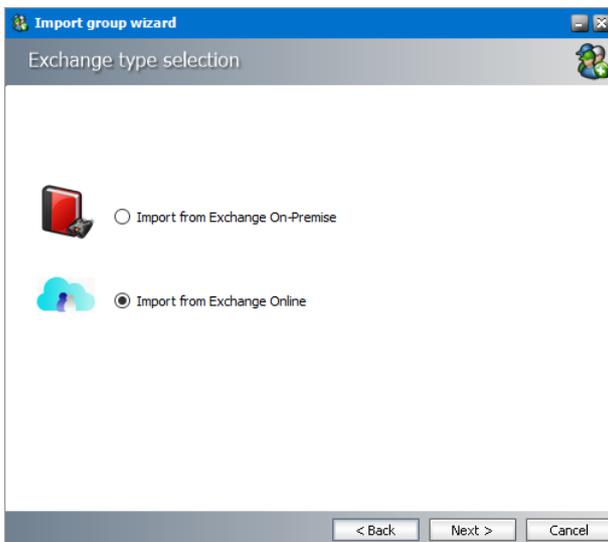
10. When the import process has completed, click **Close**.

# Steps to import groups from an online Microsoft Exchange Server

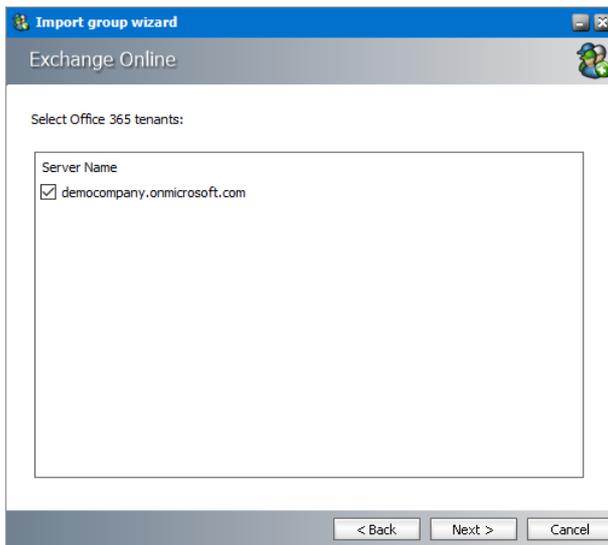
1. In the *Import group wizard* window, select **Import Groups**.



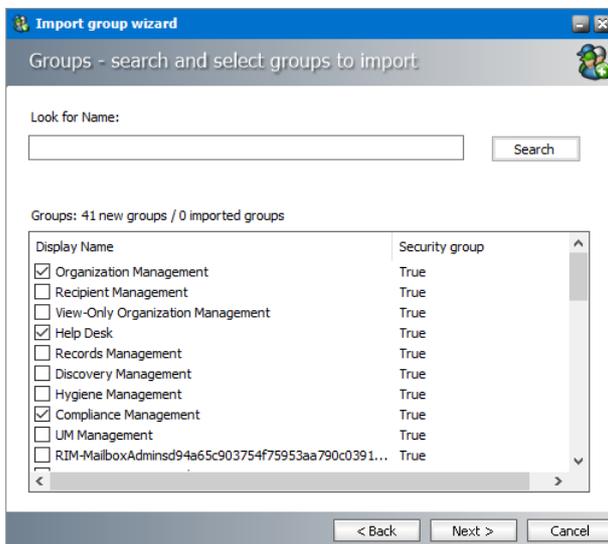
2. Click **Next**. In the *Exchange Type selection* window, select **Import from Exchange Online**.



3. Click **Next**. The *Exchange Online* window opens. Select the desired online Microsoft Exchange server.



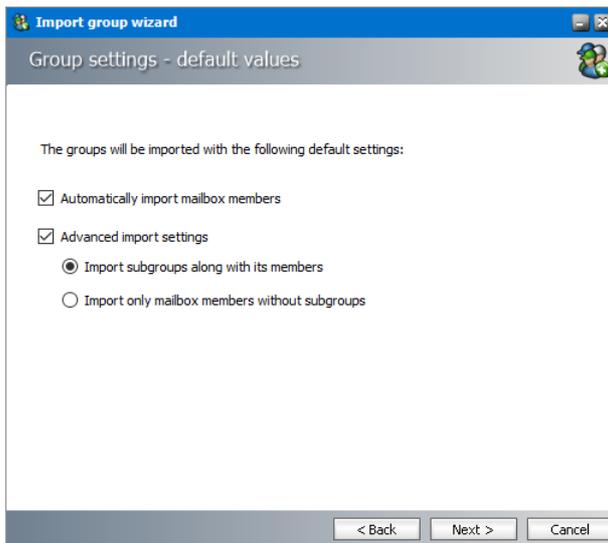
4. Click **Next**. The *Groups - search and select groups to import* window opens.



5. Click **Search** to return the list of all groups across all online servers available to the Address Book Manager. To reduce the list of groups, you can specify a search term in the **Look for Name** search box. Only the initial letters of the group **Display Name** can be specified and wildcards are not supported. The search term is case-insensitive.

**i** **NOTE:** Groups that are highlighted indicate that they already exist in the Address Book Manager. The list summary above the list of groups will indicate how many groups that you select are new, and how many already exist. If you select pre-existing groups, all new mailboxes in those groups will also be imported.

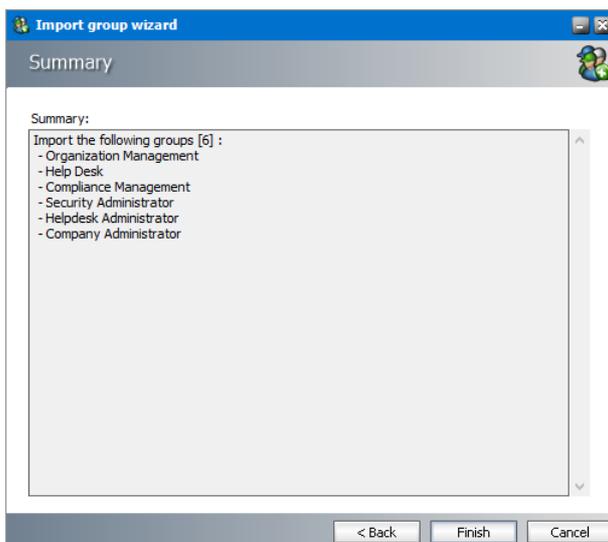
6. Select the groups that you want to import.
7. Click **Next**. The *Group settings - default values* window opens



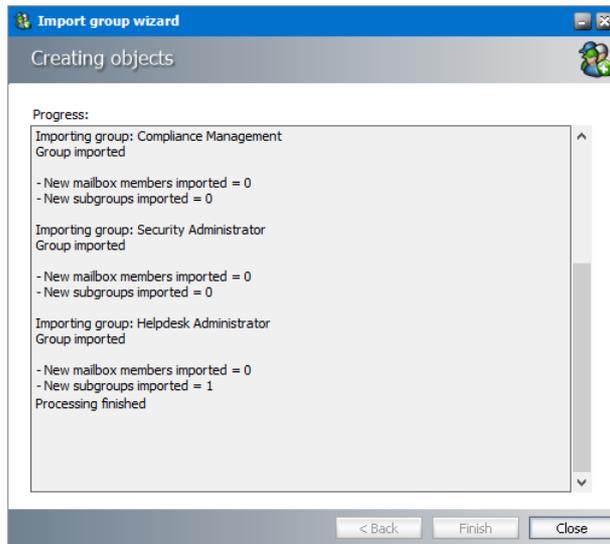
8. Specify the settings which will be applied when the groups are imported now or synchronized in future with the Address Book Manager automatically or manually. The settings are described below:

- a. **Automatically import mailbox members** - check this box to import all Active Directory accounts with a mailbox that are members of this group.
- b. **Advanced import settings** - check this box if you intend to import subgroups and subgroup mailbox members. You can activate this setting only if you select the **Automatically import mailbox members** setting.
- c. **Import subgroups along with members** - check this box to import existing subgroups of selected groups including its member mailboxes. This is the default setting.
- d. **Import only mailbox members without subgroups** - check this box to import only member mailboxes from subgroups. These mailboxes will be added to mailboxes in the parent group in the Address Book Manager.

9. Click **Next**. The *Summary* window opens that lists the groups that will be added.



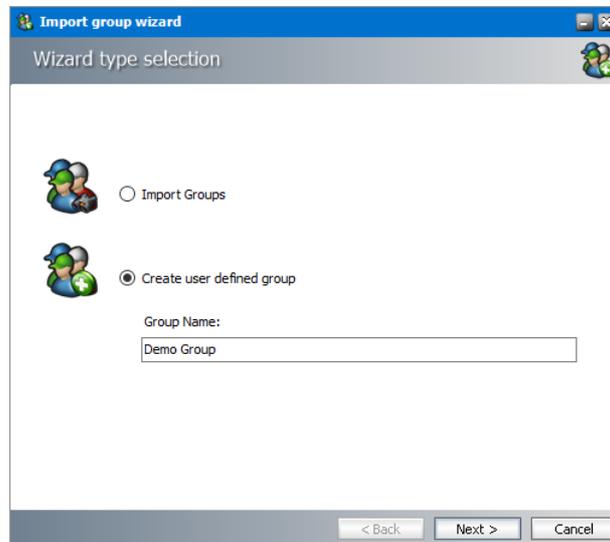
10. Click **Finish** to start the import process. The *Creating objects* window opens. You can click **Back** to select more groups to add or remove some of the selected groups.



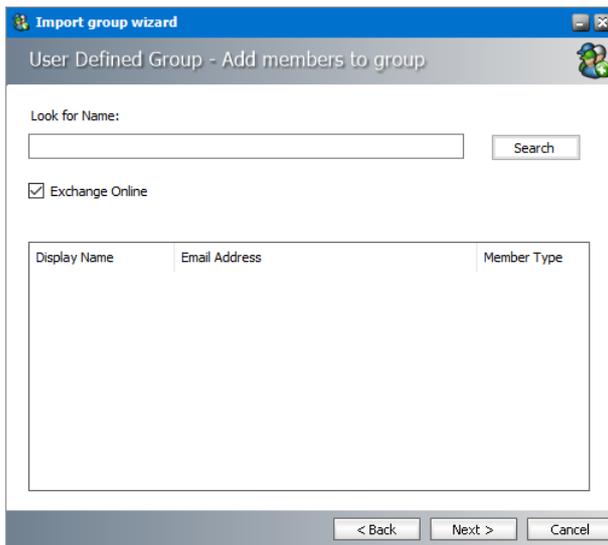
11. When the import process has completed, click **Close**.

## Steps to create user-defined groups

1. In the Import group wizard window, select **Create user defined group**. Enter a name for the group in the **Group Name** field.



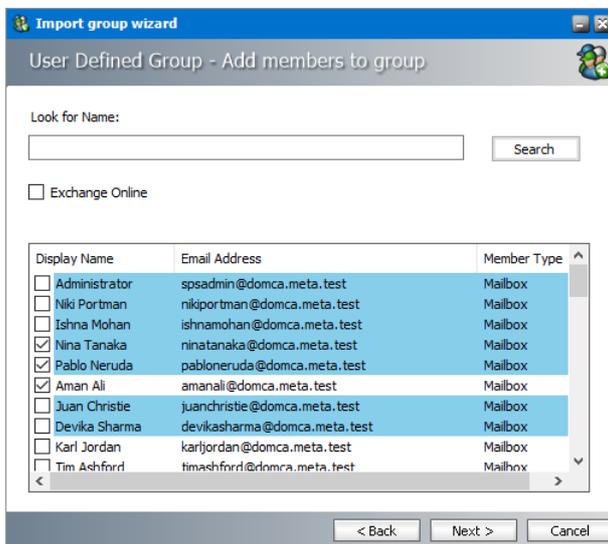
2. Click **Next**. The *User Defined Group - Add members to group* window opens. By default, the on-premise Microsoft Exchange server is the source for the list of mailboxes and groups that can be added to the user-defined group. To use O365 Exchange servers as a source for mailboxes and groups, select **Exchange Online**.



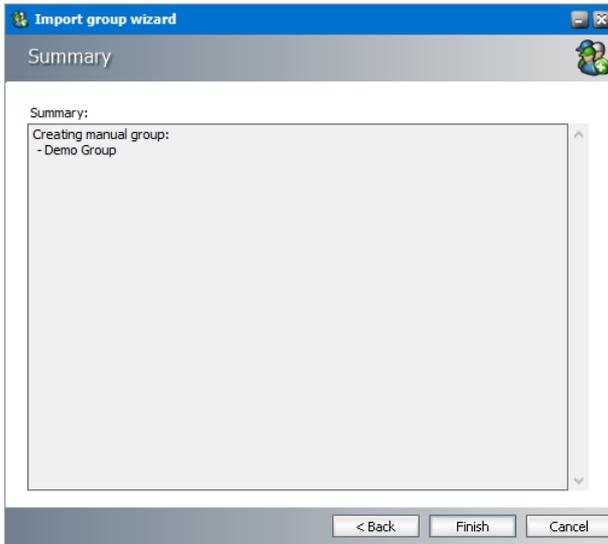
3. Click **Search** to return the list of all mailboxes and groups. To reduce the list of mailboxes and groups, you can specify a search term in the **Look for Name** search box. Only the initial letters of the mailbox or group **Display Name** can be specified and wildcards are not supported. The search term is case-insensitive.

**i NOTE:** If the **Exchange Online** check box is checked, only the online Microsoft Exchange servers will be used as the source. If the **Exchange Online** check box is unchecked, only on-premise Microsoft Exchange servers will be used as the source.

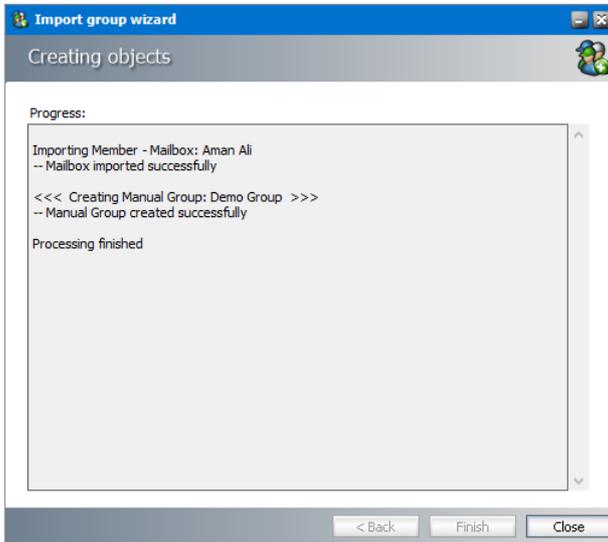
Mailboxes and groups that are highlighted indicate that they already exist in the Address Book Manager. The list summary above the list of groups will indicate how many mailboxes and groups are available.



4. Select one or more mailboxes and groups that want to add to the user-defined group. If you select one or more groups, all mailboxes in that group will also be add to the user-defined group during the import process.
5. Click **Next**. The *Summary* window opens that indicates the user-defined group that will be created.



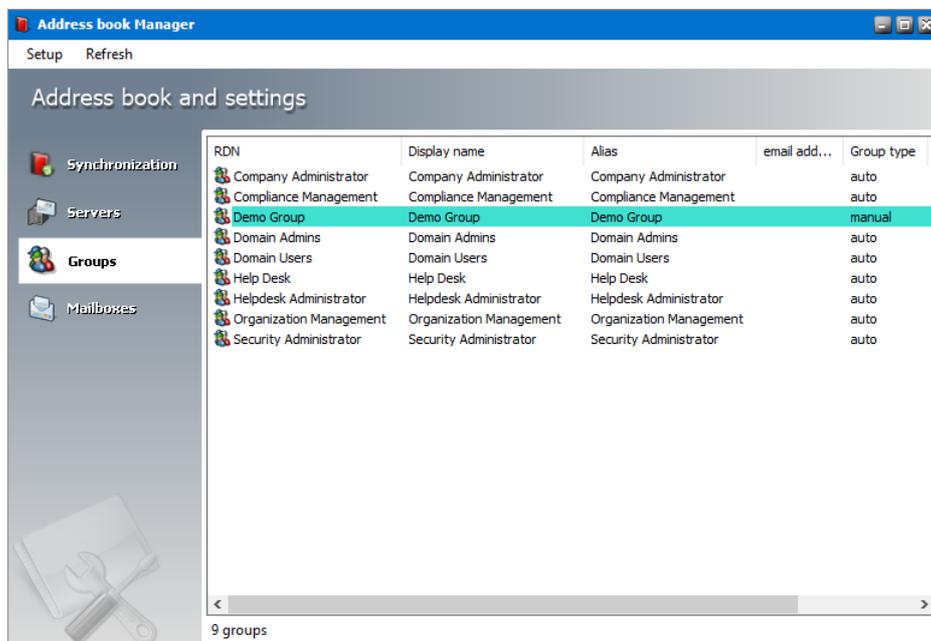
6. Click **Finish** to start the group creation process. The *Creating Object* window opens. You can click **Back** to revise your selection of mailboxes and groups.



7. When the import process has completed, click **Close**.

## Steps to verify the imported groups

1. Open the Address Book Manager
2. Click the **Groups** tab and verify that the imported Active Directory and user-defined groups appear in the list view as expected. User-defined groups are highlighted in green.



3. Select a group and right-click to open the context menu. Click **Properties**. The *Properties* window of the selected group appears.
4. Click the **Members** tab and verify that the list of mailboxes were imported as expected.

## Synchronizing Address Book Manager

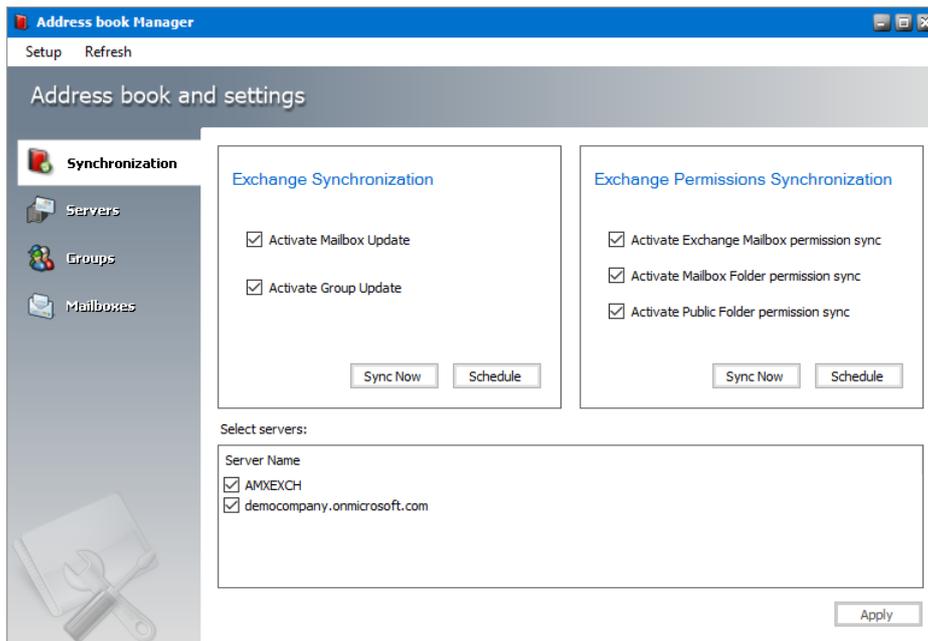
Synchronization with the Microsoft Exchange servers keeps groups and mailboxes up to date so that emails can be archived without problems. With the Address Book Manager, you can set up automatic synchronization schedules and initiate manual synchronization of various artifacts.

In this topic:

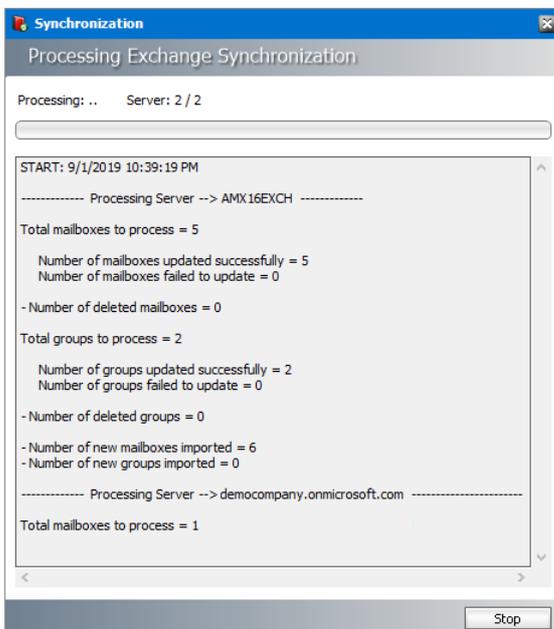
- [Steps to perform a manual synchronization](#)
- [Steps to schedule automatic synchronization](#)

## Steps to perform a manual synchronization

1. Open Address Book Manager by clicking the toolbar icon  or clicking **Address Book Manager** from the **Tools** menu.
2. The **Synchronization** tab opens by default.

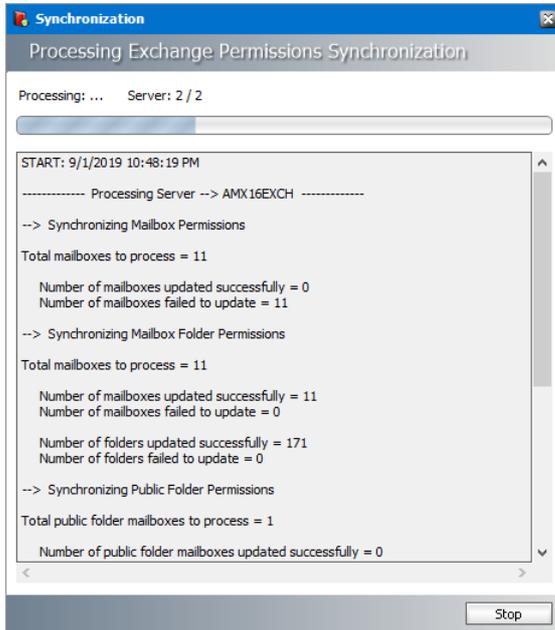


3. Select the Microsoft Exchange mailboxes, groups and permissions that you want to synchronize.
4. In the **Select servers** box, select the Microsoft Exchange servers with which you want to synchronize the mailboxes, groups and permissions.
5. Click **Apply** to confirm the settings.
6. Click **Sync Now** in the *Microsoft Exchange Synchronization* box to manually initiate the synchronization of the mailboxes and groups with the selected Microsoft Exchange servers.



7. Click **Stop** to halt the synchronization process before it completes. When the process completes, click the **Close** button that appears. You can find the results of the synchronization process in a log file located at `C:\Program Files (x86)\Metalogix\MAM4Microsoft Exchange\Log\Synchronization_<timestamp>.log`

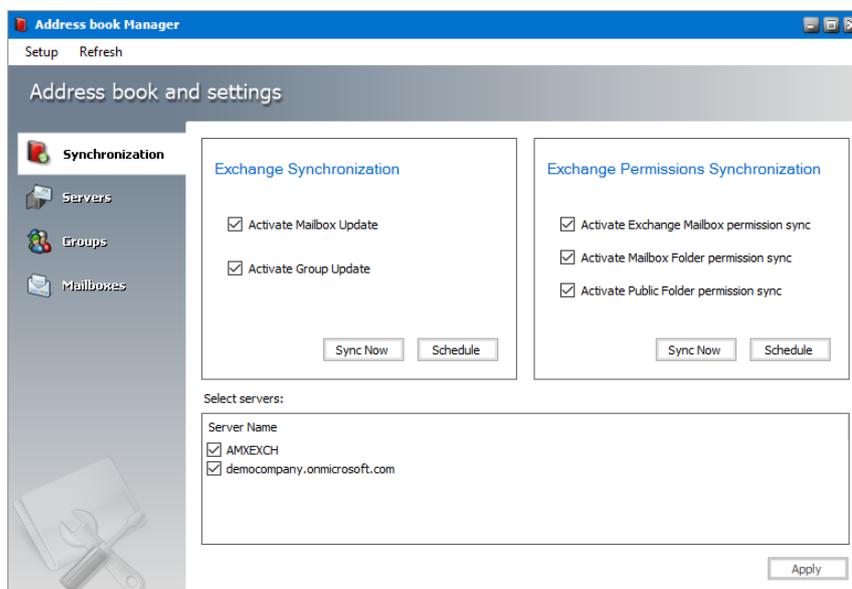
- Click **Sync Now** in the *Microsoft Exchange Permissions Synchronization* box to manually initiate the synchronization of the mailboxes and groups with the selected Microsoft Exchange servers.



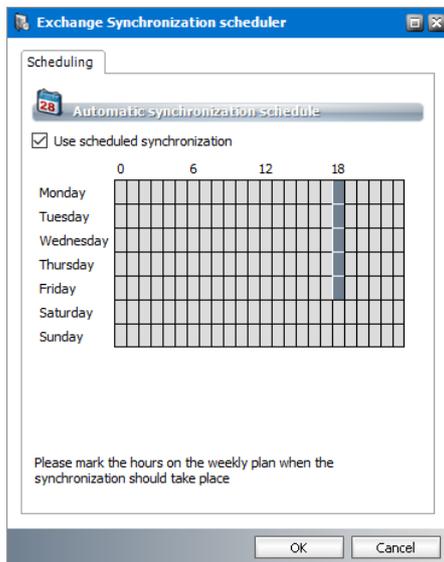
- Click **Stop** to halt the synchronization process before it completes. When the process completes, click the **Close** button that appears. You can find the results of the synchronization process in a log file located at `C:\Program Files (x86)\Metalogix\MAM4Microsoft Exchange\Log\Synchronization_<timestamp>.log`

## Steps to schedule automatic synchronization

- Open Address Book Manager by clicking the toolbar icon  or clicking **Address Book Manager** from the **Tools** menu.
- The **Synchronization** tab opens by default.



3. Select the Microsoft Exchange mailboxes, groups and permissions that you want to synchronize.
4. In the **Select servers** box, select the Microsoft Exchange servers with which you want to synchronize the mailboxes, groups and permissions.
5. Click **Schedule** in the *Microsoft Exchange Synchronization* box. The *Microsoft Exchange Synchronization Scheduler* dialog appears.



6. Select **Use scheduled synchronization** to activate the synchronization calendar. Each row corresponds to a *day of the week*. Each column corresponds to an *hour of the day* (24-hour clock).
7. To set up a schedule using the synchronization calendar, click the cell that corresponds to the day of the week and the hour of day when you want the scheduler to initiate a synchronization job. For example, in the figure above, the synchronization schedule is set to start at 18:00 hrs (6 pm) every weekday. The time zone of the computer where the application is running will be used to determine the time.

**i** **NOTE:** If you select consecutive cells in a single row, synchronization will start automatically every hour on the hour. It will consume unnecessary processing time and is not recommended.

8. Click **OK** to save the schedule or **Cancel** to discard the setup.
9. You can find the results of the scheduled synchronization process in a log file located at `c:\Program Files (x86)\Metalogix\MAM4Microsoft Exchange\Log\Synchronization_<timestamp>.log`

# Managing Servers

The Address Book Manager provides all the necessary tools to manage Microsoft Exchange on-premise and online servers that are imported into the Address Book Manager.

In this topic:

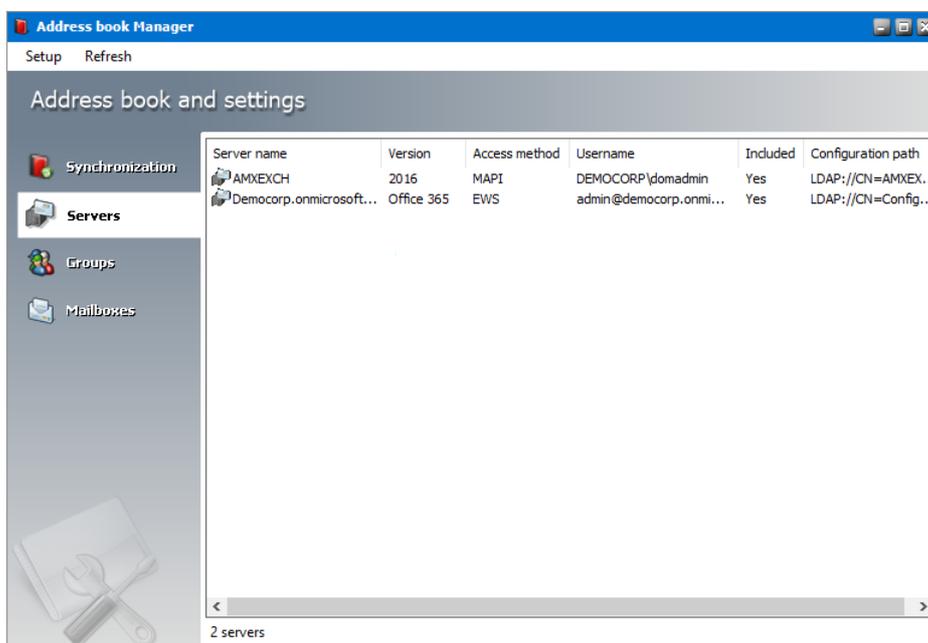
- [Managing the servers list view](#)
- [Managing Server Tasks](#)
- [Managing Server Properties](#)

## Managing the servers list view

The servers list view displays the on-premise and online servers that are imported into the Address Book Manager.

### Steps to view the servers list

1. Open Address Book Manager by clicking the toolbar icon  or clicking **Address Book Manager** from the **Tools** menu.
2. Click the **Servers** tab. The servers list view appears with a default set of columns. You can add or remove these columns.

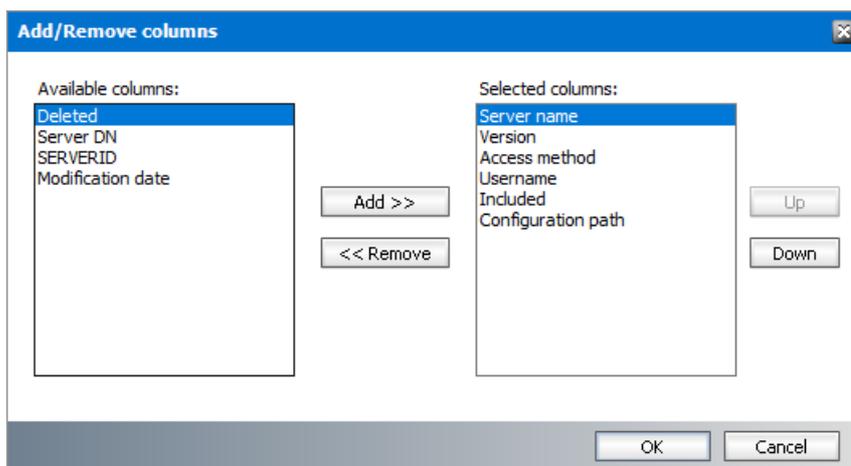


3. The columns are as follows:
  - a. **Server name** - the name of the on-premise or online Microsoft Exchange server
  - b. **Version** - the version of the Microsoft Exchange application installed on the server.

- c. **Access Method** - How Metalogix Archive Manager for Exchange connects to the Microsoft Exchange server. The two possible values are **MAPI** or **EWS**.
- d. **Username** - the username that is used to access the server. The format for an onpremise exchange server is <domain>\<username> and for an O365 sever it is the email address.
- e. **Included** - **Yes** indicates that the server will be synchronized. **No** indicates that the server will not be synchronized and is also highlighted in green ■
- f. **Configuration path** - LDAP Uniform Resource Locator (URL) that defines the server location.
- g. **Deleted** - **No** indicates the server is active in Address Book Manager. **Yes** indicates that the server is logically deleted from the list of servers and is will not be used. Deleted servers are highlighted in red ■
- h. **Server DN** - legacy distinguished name (DN) of the Microsoft Exchange server.
- i. **Server Id** - a unique serial number allocated to each server in Address Book Manager.
- j. **Modification Date** - the most recent date when the server was synchronized.

## Steps to add or remove server list columns

1. Right-click to open the context menu and click **Add/Remove columns...**



2. To add a column to the display:
  - a. Select the column from the *Available columns* list box.
  - b. Click **Add** to move the column to the *Selected columns* list box.
  - c. Use the **Up** and **Down** buttons to column the new column. The topmost column in the *Selected columns* list box corresponds to the first column in the list view.
  - d. Click **OK** to close the dialog box and view the revised set of columns in the list view.
3. To remove a column from the list view:
  - a. Select the column from the *Selected columns* list box.
  - b. Click **Remove** to move the column to the *Available columns* list box.
  - c. Click **OK** to close the dialog box and view the revised set of columns in the list view.

## Steps to refresh the list view

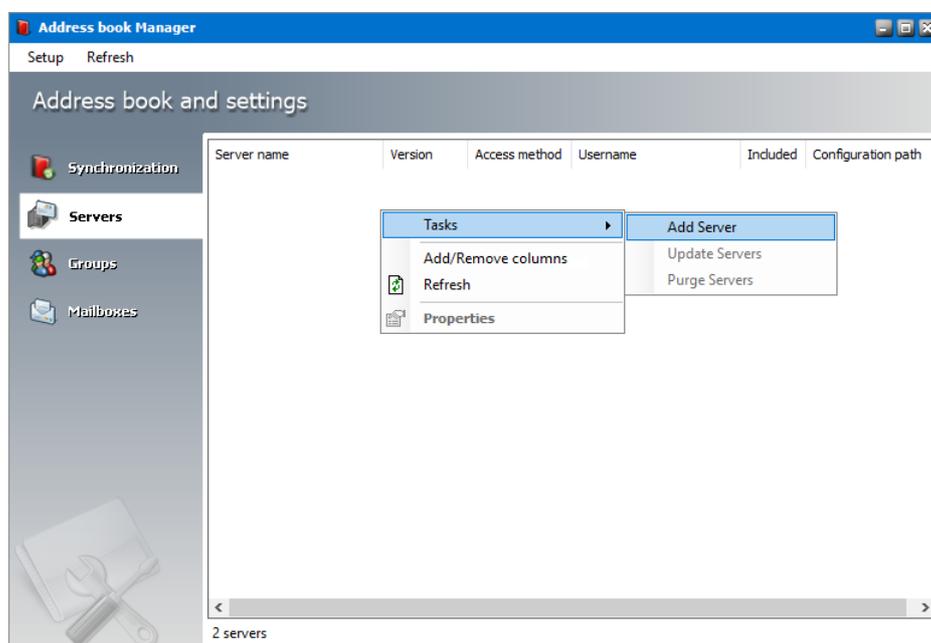
1. Right-click to open the context menu and select **Refresh**. All servers in the list will be refreshed.

## Managing Server Tasks

The Servers section of the Address Book Manager provides a set of tasks to add, update, remove and repair Microsoft Exchange servers. Each of these tasks are described below.

### Adding a new on-premise or online Microsoft Exchange server

1. Right-click inside the list view and from the context menu point to **Tasks** and select **Add Server...** to initiate the import process.



2. For detailed steps about importing on-premise servers see [Steps to add on-premise Microsoft Exchange servers](#).
3. For detailed steps about importing online servers see [Steps to add online Microsoft Exchange servers](#).

### Updating Microsoft Exchange servers

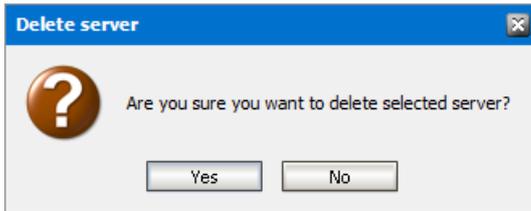
1. Select a server from the server list view.
2. Right-click to open the context menu. Point to **Tasks** to open the sub-menu and select **Update Servers**.
3. When the selected server is updated successfully, a confirmation message is displayed.



**NOTE:** If the superuser is changed, you must update the servers so that the superuser information is updated.

## Removing Microsoft Exchange servers from the list

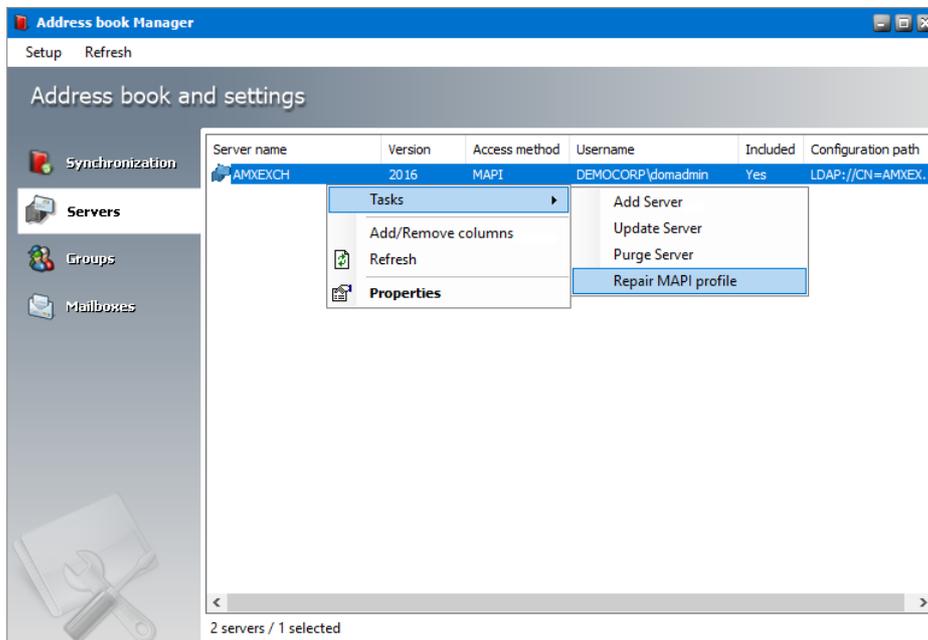
1. Select a server from the server list view that you want to remove.
2. Right-click to open the context menu. Point to **Tasks** to open the sub-menu and select **Purge Servers**.



3. Click **Yes** to confirm that you want to remove the selected server from the Address Book Manager. Click **No** to cancel the operation.

## Repairing the MAPI profile

1. Select a server from the server list view that you want to remove.
2. Right-click to open the context menu. Point to **Tasks** to open the sub-menu and select **Repair MAPI Profile**.



3. The MAPI profile will be updated.

# Managing Server Properties

Microsoft Exchange Servers can be either on-premise servers or online Office 365 servers. The properties of each Microsoft Exchange server added to the Address Book Manager can be managed through the *Properties* dialog box. They are grouped by tabs and each property group is explained in detail below.

For on-premise servers:

- [General properties](#)
- [EWS properties](#)
- [MAPI properties](#)
- [Advanced properties](#)

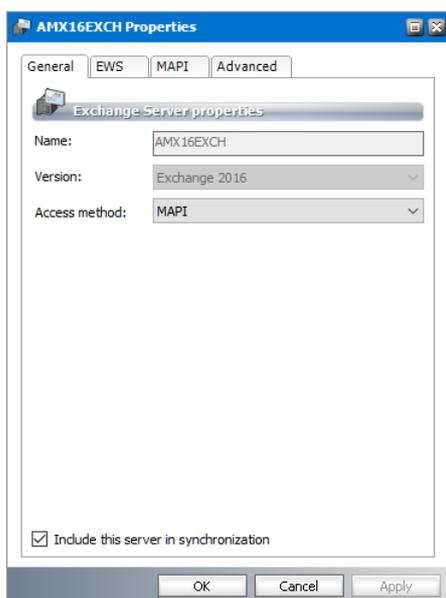
For online Office 365 servers:

- [General properties](#)
- [O365 properties](#)
- [Steps to add additional service accounts](#)

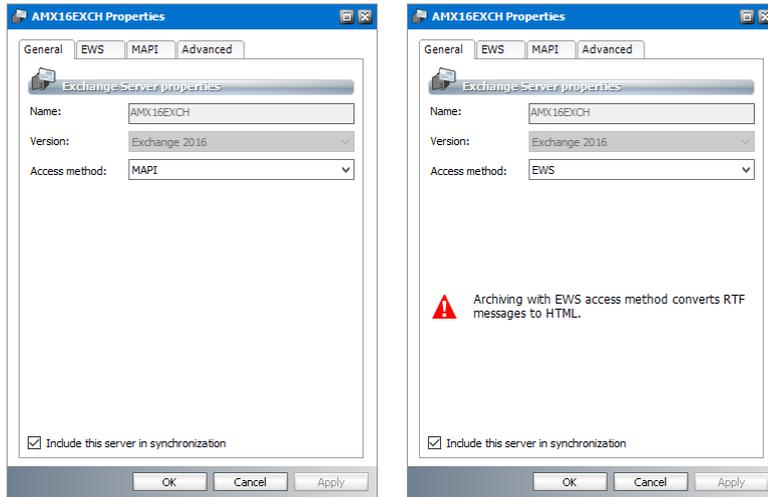
## ► For on-premise servers

### General properties

1. Select an on-premise server from the server list.
2. Right-click to open the context menu and click **Properties**. The *Properties* dialog for the selected server appears and the *General* tab is displayed by default.
3. Click the **General** tab if not already selected.



4. This section provides generic information about the server. The properties are as follows:
  - a. **Server name** - Read-only. The name of the on-premise or online Microsoft Exchange server.
  - b. **Version** - Read-only. The version of the Microsoft Exchange application installed on the server.
  - c. **Access Method** - Choose how Metalogix Archive Manager for Exchange connects to the Microsoft Exchange server. The two possible values are **MAPI** or **EWS**. If access method is **EWS**, all RTF messages will be converted to HTML when messages are archived.

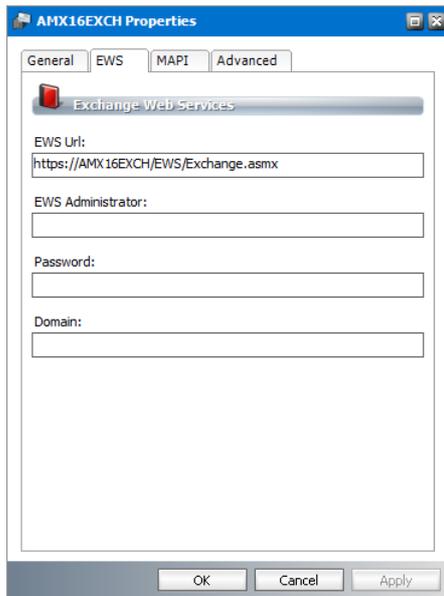


- d. **Include this server in synchronization** - When this check box is checked, the server is included in the synchronization process. When this check box is unchecked, the server will not be synchronized and appears in the list view highlighted in green
5. Click **OK** to save changes and close the dialog. Click **Cancel** to reject any changes and close the dialog.

## EWS properties

1. Select an on-premise server from the server list.
2. Right-click to open the context menu and click **Properties**. The *Properties* dialog for the selected server appears.

3. Click the **EWS** tab.



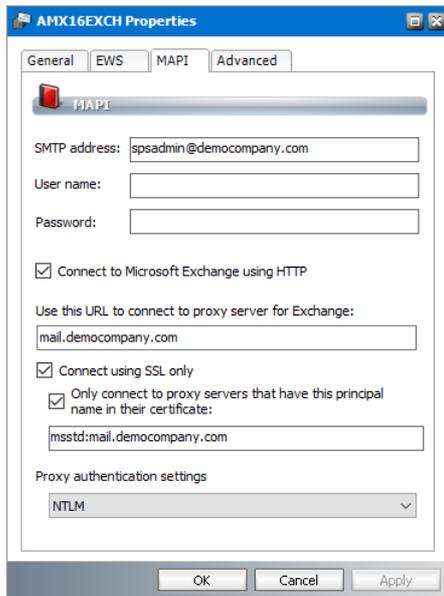
The properties are as follows:

- a. **EWS Url** - https://<Microsoft-Exchange-server-IP-Address-or-Name>/EWS/Microsoft Exchange.asmx
  - b. **EWS Administrator** - user name of an EWS administrator who must have impersonation permissions. This is usually the super-user.
  - c. **Password** - password of the EWS Administrator.
  - d. **Domain** - domain of the given user.
4. Click **OK** to save changes and close the dialog. Click **Cancel** to reject any changes and close the dialog.

## MAPI properties

1. Select an on-premise server from the server list.
2. Right-click to open the context menu and click **Properties**. The *Properties* dialog for the selected server appears.

3. Click the **MAPI** tab.



The properties in this section are as follows:

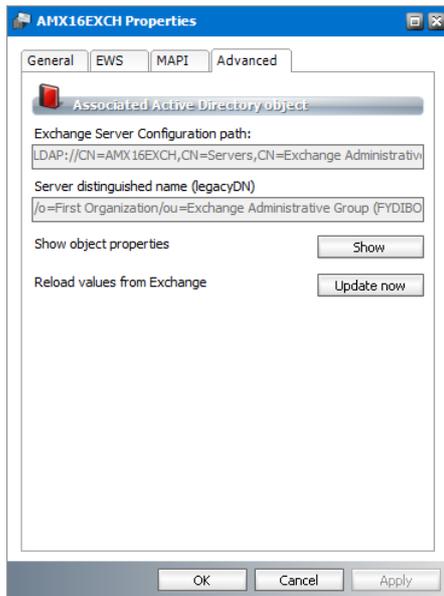
- a. **SMTP address** - email address of the superuser that is automatically imported from the Exchange server settings.
  - b. **User name** - user name of the superuser for MAPI communication.
  - c. **Password** - password of the superuser for MAPI communication.
  - d. **Connect to Microsoft Exchange using HTTP** - If selected, the Exchange server connection will use the HTTP protocol.
  - e. **Proxy server URL** - Address of the proxy server if applicable.
  - f. **Connect using SSL only** - If selected, the connection will be encrypted using SSL.
  - g. **Only connect to proxy servers that have this principal name in their certificate** - specify the Certificate Principal Name to connect to proxy servers if certificate mapping is used in the Active Directory.
  - h. **Proxy authentication settings** - authentication protocol for the proxy server if a proxy server is used.
5. Click **OK** to save changes and close the dialog. Click **Cancel** to reject any changes and close the dialog.

## Advanced properties

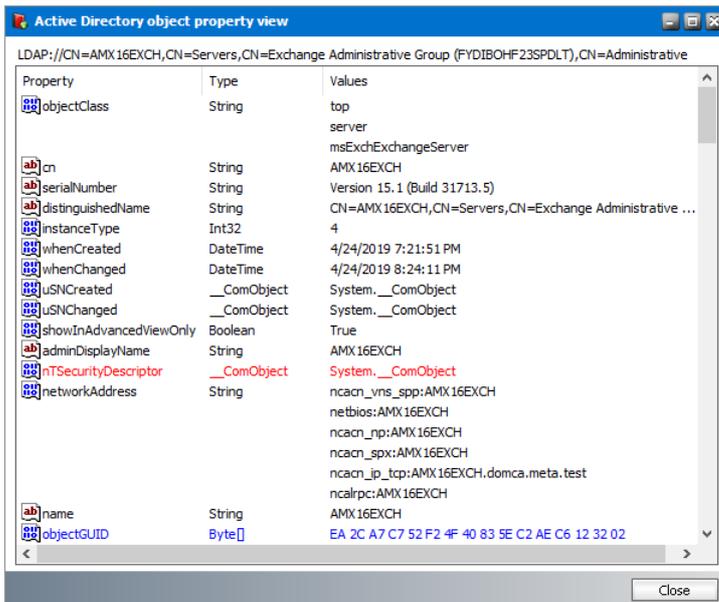
This section displays properties that define the configuration path and server distinguished name

1. Select an on-premise server from the server list.
2. Right-click to open the context menu and click **Properties**. The *Properties* dialog for the selected server appears.

3. Click the **Advanced** tab.



4. Click **Update now** to refresh server property values.
5. Click the **Show** button to display more information about the Microsoft Exchange server.



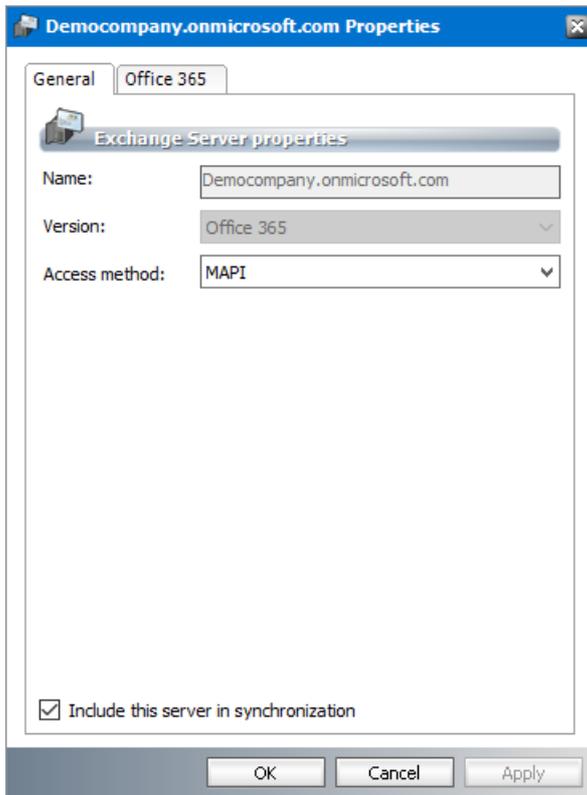
6. Click **Close** to close the dialog.

## ► For on-line Office 365 servers

### General properties

1. Select an on-line server from the server list.
2. Right-click to open the context menu and click **Properties**. The *Properties* dialog for the selected server appears and the *General* tab is displayed by default.

3. Click the **General** tab if not already selected.



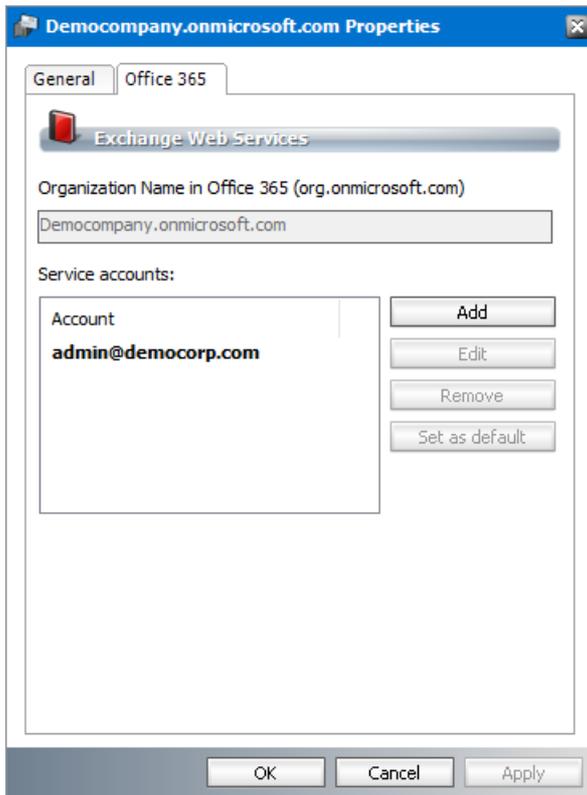
4. This section provides generic information about the server. The properties are as follows:
  - a. **Server name** - Read-only. The name of the on-premise or online Microsoft Exchange server.
  - b. **Version** - Read-only. The version of the Microsoft Exchange application installed on the server.
  - c. **Access Method** - Choose how Metalogix Archive Manager for Exchange connects to the Microsoft Exchange server. The two possible values are **MAPI** or **EWS**. If access method is **EWS**, all RTF messages will be converted to HTML when messages are archived.
  - d. **Include this server in synchronization** - When this check box is checked, the server is included in the synchronization process. When this check box is unchecked, the server will not be synchronized and appears in the list view highlighted in green ■
5. Click **OK** to save changes and close the dialog. Click **Cancel** to reject any changes and close the dialog.

## O365 properties

This section displays properties that define the server name and service accounts.

1. Select an online server from the server list.
2. Right-click to open the context menu and click **Properties**. The *Properties* dialog for the selected server appears.

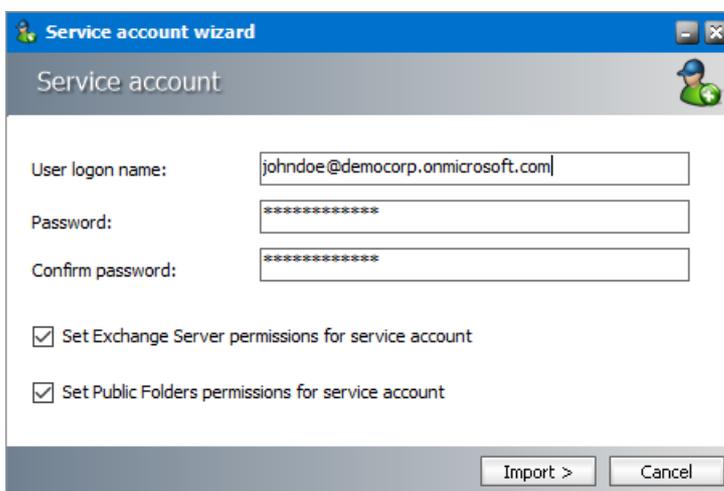
3. Click the **O365** tab.



4. The properties in this section are as follows:
  - a. **Organization Name in Office 365** - name of the imported online Exchange server.
  - b. **Service Accounts** - list of user names authorized to archive emails from the O365 server.

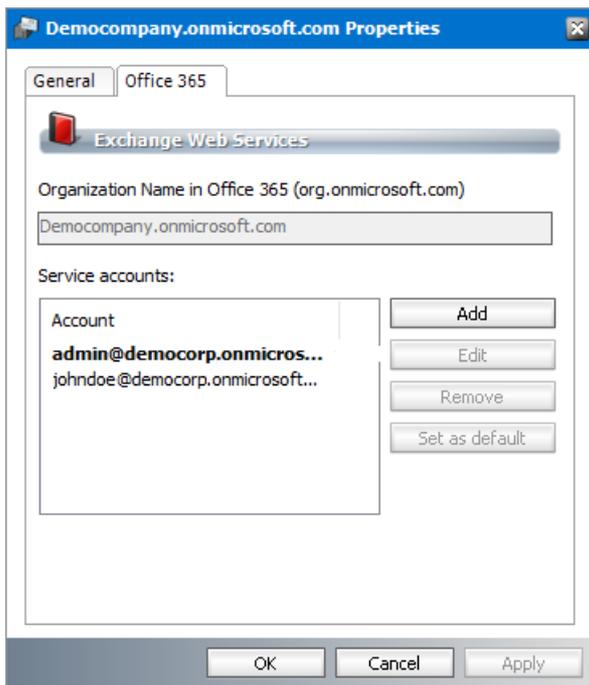
## Steps to add additional service accounts

1. From the *O365* tab of any online server *Properties* dialog, click **Add**. The *Service account wizard* opens.
2. Enter the service account properties as described below:



The properties are as follows:

- a. **User logon name** - O365 user name.
  - b. **Password** - password of the O365 user account.
  - c. **Confirm password** - re-enter the password entered in the Password field.
  - d. **Set Exchange server permissions for service account** - select the check box to grant elevated rights to the service account on the selected O365 Exchange Server.
  - e. **Set Public Folder permissions for service account** - select the check box to grant OWNER permission to the Public folders.
3. Click **Import** to add the new service account to O365 service Accounts list.



4. Click **OK** to save changes and close the dialog. Click **Cancel** to reject any changes and close the dialog.

**i** **NOTES:**

1. The default service account is indicated in bold. To change the default service account, select another user account and click **Set as default**. The selected user account will change to a bold font.
2. To edit a service account, select an account and click **Edit** and make changes as needed.
3. To remove a service account, select an account that is not the default service account. Click **Remove** to delete the account from the *Service accounts* list. Then click **Yes** in the Confirmation dialog. You cannot remove a default service account. You must first set another service account as a default if you want to remove the account.
4. Any user who has multi-factor authentication activated on Office 365 cannot be added as a service account.
5. A user account with basic authentication deactivated on Office 365 cannot be used as a *superuser* with the MAPI access method.

# Managing Groups

The Address Book Manager provides all the necessary tools to manage groups that are imported from Microsoft Exchange servers or created by the administrator.

In this topic:

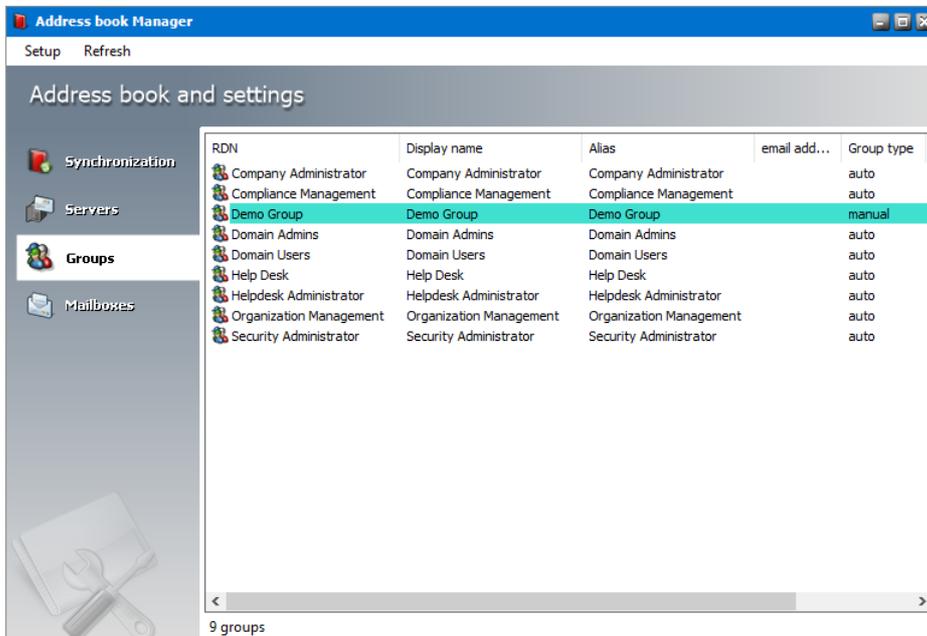
- [Managing the Groups list view](#)
- [Managing Group Tasks](#)
- [Managing Group Properties](#)
- [Adding members to a user-defined group](#)
- [Removing members from a user-defined group](#)

## Managing the groups list view

The groups list view displays the groups that are imported from Microsoft Exchange servers or created by the administrator.

### Steps to view the groups list

1. Open Address Book Manager by clicking the toolbar icon  or clicking **Address Book Manager** from the **Tools** menu.
2. Click the **Groups** tab. The groups list view appears with a default set of columns. You can add or remove columns. User-defined groups are highlighted in green .

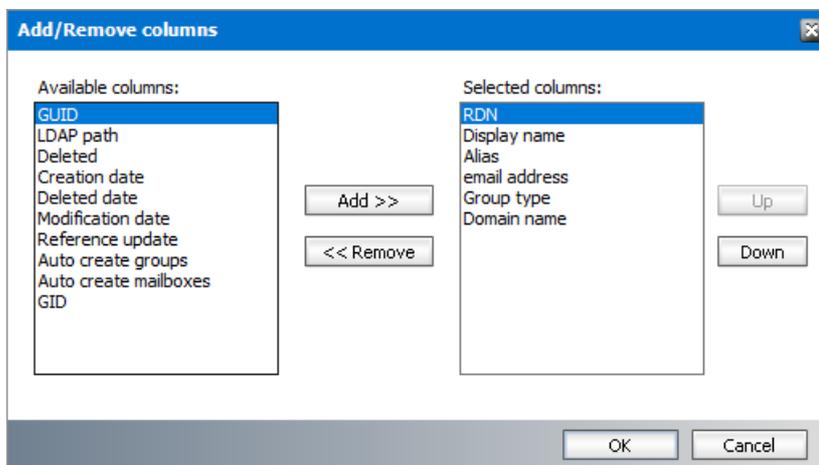


3. The columns are as follows:
  - a. **RDN** - Distinguished name of the recipient.

- b. **Display Name** - Display name of the recipient.
- c. **Alias** - Alias of the recipient.
- d. **Email Address** - Email address of the recipient.
- e. **Group Type** - indicates the source of the group. Valid value are **auto** if the group was imported from an on-Premise Exchange server, and **manual** if the group was created manually.
- f. **Domain Name** - the domain where the group belongs.
- g. **GUID** - Unique identifier of this mailbox in the Microsoft Exchange server.
- h. **LDAP Path** - Active Directory specification of the mailbox recipient.
- i. **Deleted - Yes** indicates the mailbox is deleted. **No** indicates the mailbox is active.
- j. **Creation Date** - the date when the mailbox was imported into Address Book Manager.
- k. **Deleted Date** - the date when a mailbox update fails to find the Active Directory object specified by the LDAP path, and the mailbox is marked as deleted by the system.
- l. **Modification Date** - the most recent date when the mailbox was modified.
- m. **Reference Update** - if the value is **Yes**, then only mailbox members without subgroups should be imported during the next synchronization.
- n. **Auto create groups** - if the value is **Yes**, then existing subgroups of the corresponding group including its member mailboxes should be imported during the next synchronization.
- o. **Auto create mailboxes** - if the value is **Yes**, then the root group should be imported along with its root mailbox members only during the next synchronization. No subgroups or subgroup members will be imported.
- p. **GID** - a unique serial number allocated to each group in Address Book Manager.

## Steps to add or remove groups list columns

1. Right-click to open the context menu and click **Add/Remove columns...**



2. To add a column to the display:
  - a. Select the column from the *Available columns* list box.
  - b. Click **Add** to move the column to the *Selected columns* list box.
  - c. Use the **Up** and **Down** buttons to column the new column. The topmost column in the *Selected columns* list box corresponds to the first column in the list view.
  - d. Click **OK** to close the dialog box and view the revised set of columns in the list view.
3. To remove a column from the list view:
  - a. Select the column from the *Selected columns* list box.
  - b. Click **Remove** to move the column to the *Available columns* list box.
  - c. Click **OK** to close the dialog box and view the revised set of columns in the list view.

## Steps to refresh the list view

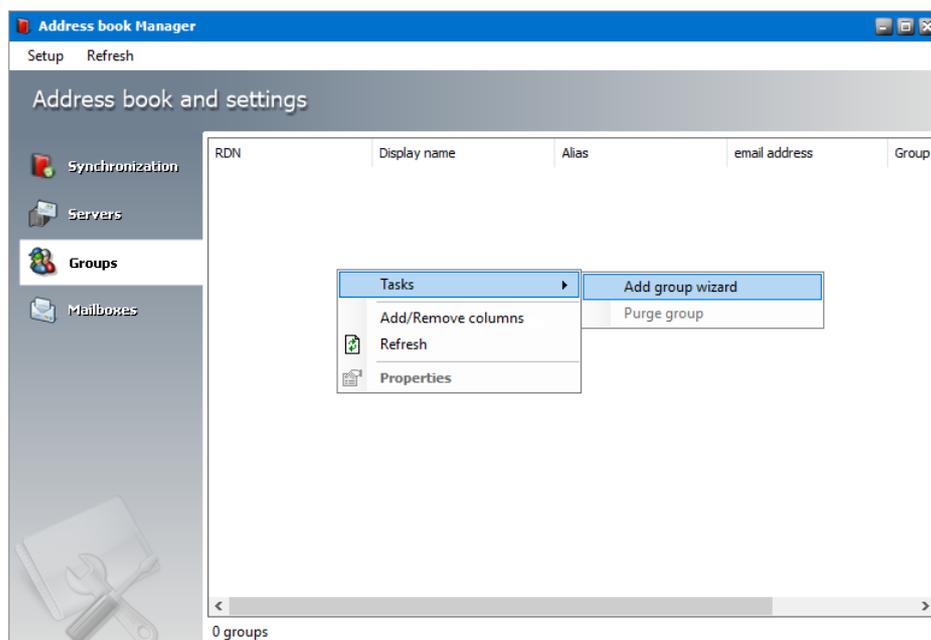
1. Right-click to open the context menu and select **Refresh**. All groups in the list will be refreshed.

# Managing Group Tasks

The Groups section of the Address Book Manager provides a set of tasks to add and remove groups. Each of these tasks are described below.

## Adding groups

1. Right-click inside the list view and from the context menu point to **Tasks** and select **Add group wizard...** to initiate the import process.



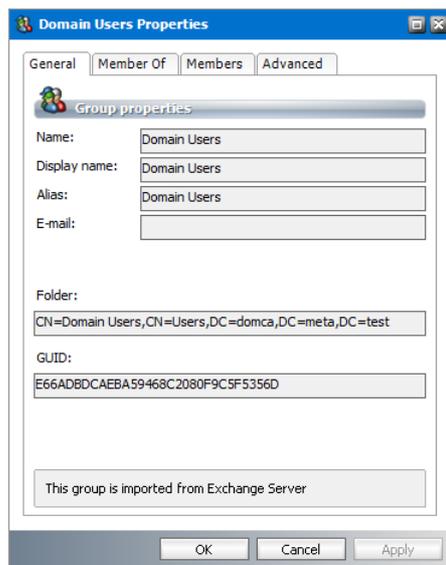
2. For detailed steps about importing on-premise groups see [Steps to import groups from on-premise Microsoft Exchange servers](#).
3. For detailed steps about importing online groups see [Steps to add groups from online Microsoft Exchange servers](#).
4. For detailed steps to create user-defined groups see [Steps to create user-defined groups](#).

## Managing Group Properties

The properties of each group added to the Address Book Manager can be managed through the Properties dialog box. They are grouped by tabs and each property group is explained in detail below.

### General properties

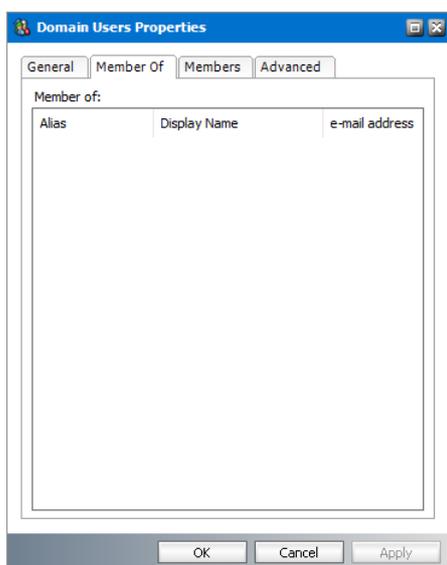
1. Select a group from the groups list.
2. Right-click to open the context menu and click **Properties**. The *Properties* dialog for the selected group appears and the *General* tab is displayed by default.



3. The properties in this section are read-only. Their descriptions are as follows:
  - a. **Name** - Name of the group.
  - b. **Display Name** - Display name of the recipient.
  - c. **Alias** - Alias of the recipient.
  - d. **Email** - the email of the group if applicable, otherwise it is blank.
  - e. **Folder** - Distinguished name of the group in the Active Directory.
  - f. **GUID** - Unique identifier of this group in the Microsoft Exchange server.

## Member Of

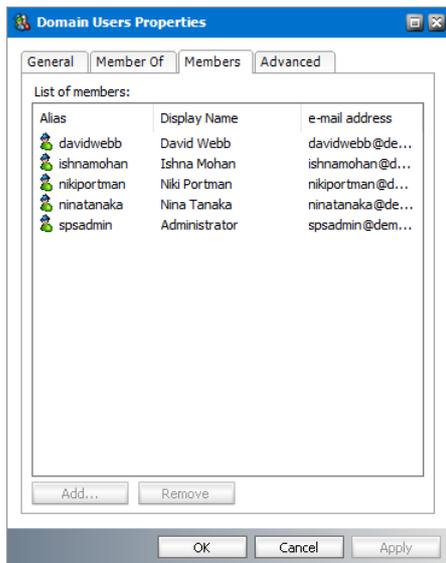
1. Select a group from the groups list.
2. Right-click to open the context menu and click **Properties**. The *Properties* dialog for the selected group appears.
3. Click the **Member Of** tab. If the selected group is a sub-group of other parent groups, a list of the parent groups appears in the *Member of* list box.



4. To view the properties of a parent group, right click on a selected group and click **Properties**. The *Properties* dialog of the group appears.

## Members

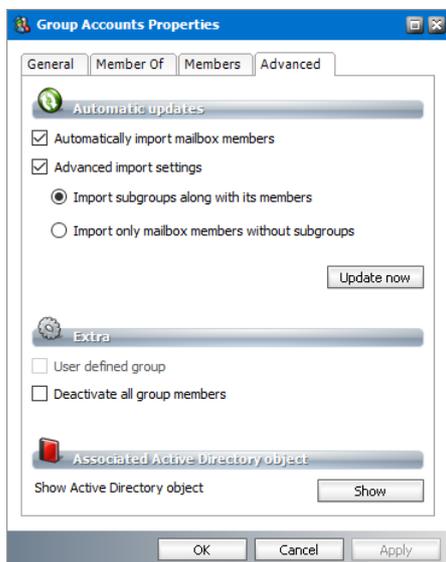
1. Select a group from the groups list.
2. Right-click to open the context menu and click **Properties**. The *Properties* dialog for the selected group appears.
3. Click the **Members** tab. If the selected group has mailboxes or other groups, they appear in the *List of Members* list box.



4. To view the properties of a mailbox or member group, right click on a selected mailbox or group and click **Properties**. The *Properties* dialog of the mailbox or group appears.

## Advanced

1. Select a group from the groups list.
2. Right-click to open the context menu and click **Properties**. The *Properties* dialog for the selected group appears.
3. Click the **Advanced** tab.



### Automatic Updates

These settings will be applied when the group is updated manually or synchronized in future with the Microsoft Exchange server automatically. The properties in this section are as follows.

- a. **Automatically import mailbox members** - check this box to import all Active Directory accounts with a mailbox that are members of this group.

- b. **Advanced import settings** - check this box if you intend to import subgroups and subgroup mailbox members. You can activate this setting only if you select the **Automatically import mailbox members** setting.
- c. **Import subgroups along with members** - check this box to import existing subgroups of the selected group including its member mailboxes. This is the default setting.
- d. **Import only mailbox members without subgroups** - check this box to import only member mailboxes from subgroups. These mailboxes will be added to mailboxes in the parent group in the Address Book Manager.

Click **Update Now** if you want to synchronize the group with the Microsoft Exchange server.

#### *Extra*

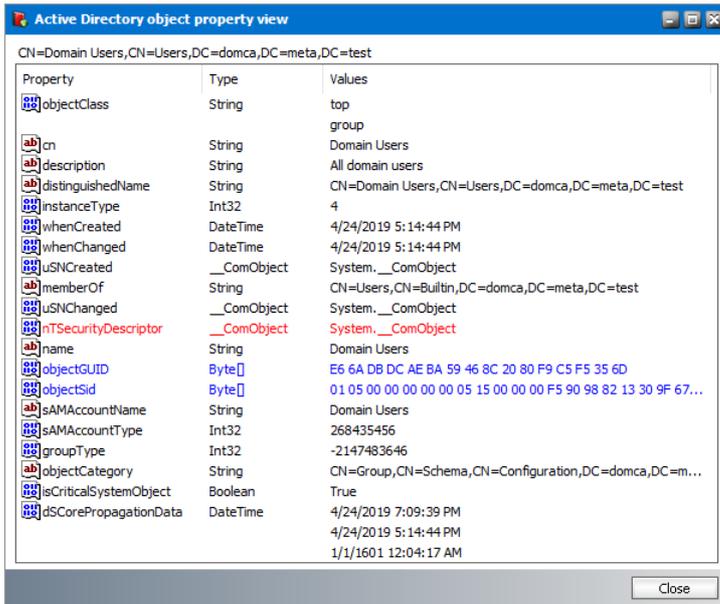
- a. **User defined group** - read only property. When checked, it indicates that this group was created manually and not imported from a Microsoft Exchange server.
- b. **Deactivate all group members** - check this box to deactivate mailboxes of users in the group. Members in sub-groups will not be deactivated. This check box is not available for user-defined groups that are created in the Address Book Manager. When a group member is deactivated the following rules apply:
  - Archive Manager will deactivate the user's mailbox even though the user is a member of another group where the member is still active.
  - Archive Manager will temporarily activate a user's mailbox if the user is a member of two or more groups where the member was deactivated and the member is subsequently activated in any one of those groups.
  - Archive Manager will deactivate a user's mailbox when mailboxes are synchronized if the user is a deactivated member of any group.

This property is used when users registered with an Archive Server in one location needs access permissions to archived content of users registered with an Archive Server in another location. Consider an example where *Susan Bennet* in location 1 needs access to archived content of a large number of users in location 2. As a global administrator you would create a group in the Active Directory and add the users from location 2 to this group. Then you would import this group to the Address Book Manager in location 1. You can now grant permissions to *Susan Bennet* with the [Mailbox Rights Manager](#) to access the archived content of the group members from location 2. However, you must deactivate these group members by selecting the **Deactivate all group members** check box so that the primary archive server for these members remains as location 2.

#### *Associated Active Directory Object*

- a. Click the **Show** button to display more information about the group from the Microsoft Exchange server.

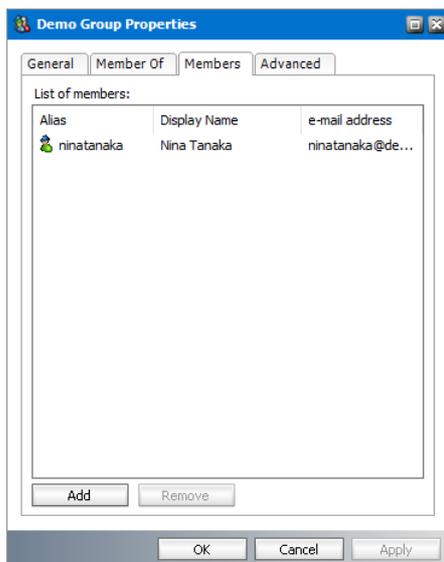
**i** | **NOTE:** The **Show Active Directory object** and the **Show** button are not available for a user-defined group.



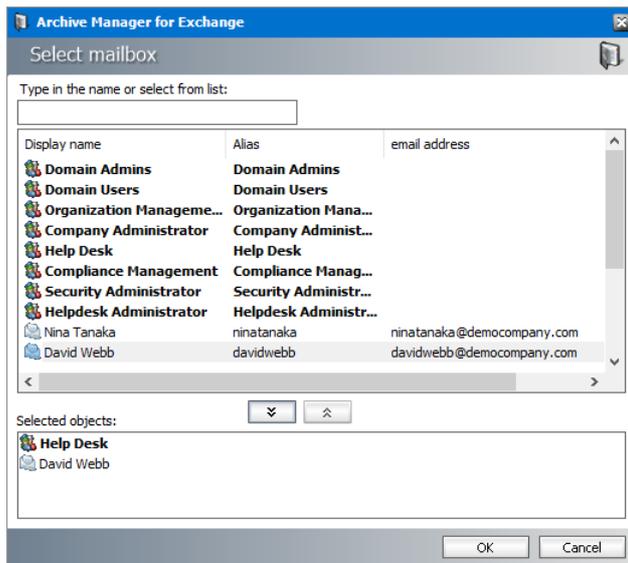
4. Click **OK** to save any changes. Click **Cancel** to discard any changes and close the properties dialog.

## Adding members to a user-defined group

1. Select a user-defined group from the groups list. User-defined groups are highlighted in green.
2. Right-click to open the context menu and click **Properties**. The *Properties* dialog for the selected group appears.
3. Click the **Members** tab. If the selected group has mailboxes or other groups, they appear in the *List of Members* list box.



4. Click **Add**. The *Select Mailbox* dialog appears.



5. Select one or more groups or mailboxes. You can hold down the **Ctrl** or **Shift** keys to select multiple mailboxes and groups.
6. Click  to add the selected groups or mailboxes to the *Selected objects* list box. Conversely, you can select groups or mailboxes from the *Selected objects* list box and click  to remove the selected groups or mailboxes from the *Selected objects* list box.
7. Click **OK** to add the selected members to the group or click **Cancel** to discard the changes.

## Removing members from a user-defined group

1. Select a user-defined group from the groups list. User-defined groups are highlighted in green .
2. Right-click to open the context menu and click **Properties**. The *Properties* dialog for the selected group appears.
3. Click the **Members** tab. If the selected group has mailboxes or other groups, they appear in the *List of Members* list box.
4. Select one or more members to remove. You can hold down the **Ctrl** or **Shift** keys to select multiple members.
5. Click **Remove**. A confirmation dialog appears.
6. Click **Yes** in the confirmation dialog to remove the member. Click **No** to retain the member.

## Managing Mailboxes

The Address Book Manager provides all the necessary tools to manage Microsoft Exchange on-premise and online mailboxes that are imported into the Address Book Manager.

In this topic:

- [Managing the Mailboxes list view](#)

- [Managing Mailbox Tasks](#)
- [Managing Mailbox Properties](#)
- [Managing Mailbox Permissions](#)

## Managing the Mailboxes list view

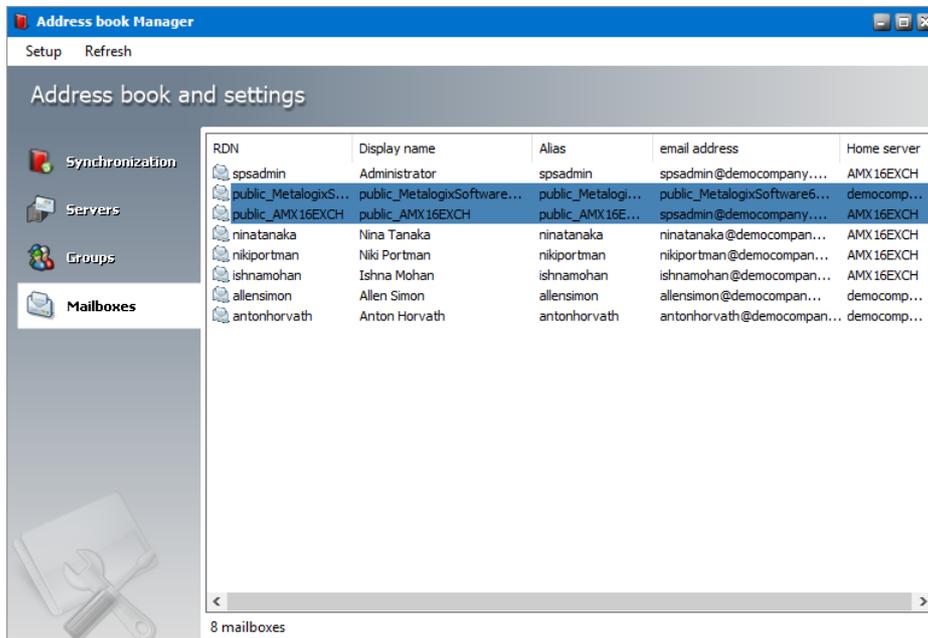
The servers list view displays the on-premise and online servers that are imported into the Address Book Manager.

**NOTE:** In the mailboxes list there are mailboxes with names like *public\_<name-of-Microsoft-Exchange-server>*. These mailboxes are the public folder from the respective Microsoft Exchange server because Address Book Manager considers a public folders as a profile. These mailboxes are always highlighted in blue ■, so you can distinguish them faster. Some features accessible for mailboxes are not applicable for these folders.

Mailboxes which are deactivated are highlighted in light blue ■.

### Steps to view the servers list

1. Open Address Book Manager by clicking the toolbar icon  or clicking **Address Book Manager** from the **Tools** menu.
2. Click the **Mailboxes** tab. The mailbox list view appears with a default set of columns. You can add or remove these columns.

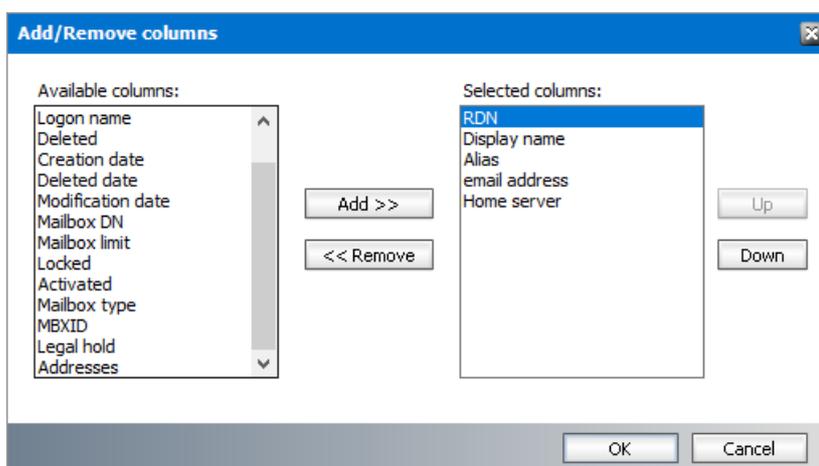


3. The columns are as follows:
  - a. **RDN** - Distinguished name of the recipient.
  - b. **Display Name** - Display name of the recipient.
  - c. **Alias** - Alias of the recipient.

- d. **Email Address** - Email address of the recipient.
- e. **Home Server** - Name of the Microsoft Exchange server that contains the mailbox.
- f. **GUID** - Unique identifier of this mailbox in the Microsoft Exchange server.
- g. **LDAP Path** - Active Directory specification of the mailbox recipient.
- h. **Logon Name** - User name used to access the mailbox
- i. **Deleted - Yes** indicates the mailbox is deleted. **No** indicates the mailbox is active.
- j. **Creation Date** - the date when the mailbox was imported into Address Book Manager.
- k. **Deleted Date** - the date when a mailbox update fails to find the Active Directory object specified by the LDAP path, and the mailbox is marked as deleted by the system.
- l. **Modification Date** - the most recent date when the mailbox was modified.
- m. **Mailbox DN** - Distinguished name of the mailbox.
- n. **Mailbox Limit** - Maximum number of emails that the mailbox can receive.
- o. **Locked** - Most recent date when the mailbox was locked.
- p. **Activated** - Most recent date when the mailbox was activated.
- q. **Mailbox Type** - Indicates the type of the mailbox. Possible values are **Normal** or **Journal**.
- r. **MBXID** - a unique serial number allocated to each mailbox in Address Book Manager.
- s. **Legal Hold - Yes** indicates there is a litigation hold on the mailbox, and modifications to archived emails are not permitted. **No** indicates there is no litigation hold.
- t. **Addresses** - Collection of email aliases of the recipient.

## Steps to add or remove mailbox list columns

1. Right-click to open the context menu and click **Add/Remove columns...**



2. To add a column to the display:
  - a. Select the column from the *Available columns* list box.

- b. Click **Add** to move the column to the *Selected columns* list box.
  - c. Use the **Up** and **Down** buttons to position the new column. The topmost column in the *Selected columns* list box corresponds to the first column in the list view.
  - d. Click **OK** to close the dialog box and view the revised set of columns in the list view.
3. To remove a column from the list view:
    - a. Select the column from the *Selected columns* list box.
    - b. Click **Remove** to move the column to the *Available columns* list box.
    - c. Click **OK** to close the dialog box and view the revised set of columns in the list view.

## Steps to refresh the list view

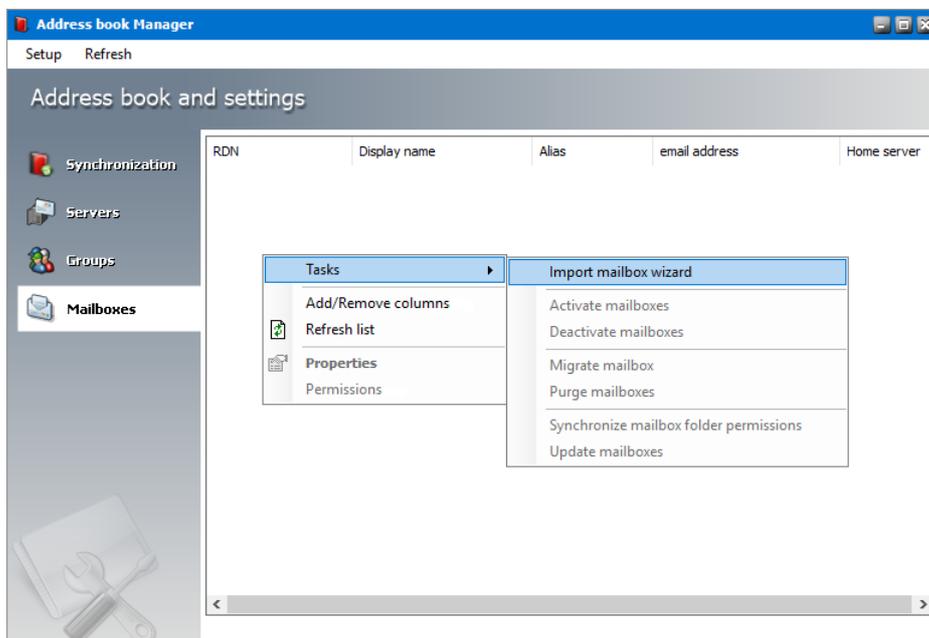
1. Right-click to open the context menu and select **Refresh List**.

# Managing Mailbox Tasks

The Mailboxes section of the Address Book Manager provides a set of tasks to import, activate, deactivate, migrate, remove, synchronize and update mailboxes. Each of these tasks are described below.

## Importing mailboxes

1. Right-click inside the list view and from the context menu point to **Tasks** and select **Import mailbox wizard...** to initiate the import process.



2. For detailed steps about importing on-premise servers see [Steps to import mailboxes from on-premise Microsoft Exchange servers](#).

3. For detailed steps about importing online servers see [Steps to import mailboxes from online Microsoft Exchange servers](#).

## Activating a mailbox

1. Select a mailbox from the mailboxes list view that was previously deactivated and appear highlighted in light blue ■.
2. Right-click to open the context menu. Point to **Tasks** to open the sub-menu and select **Activate mailbox**.
3. The mailbox is activated, and it is no longer highlighted.

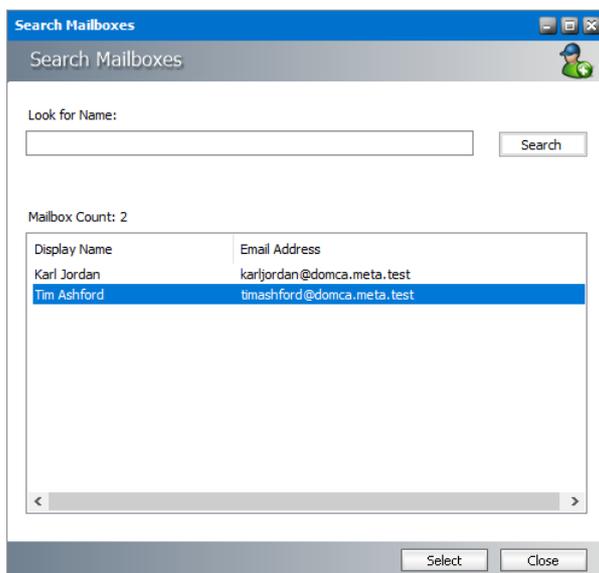
## Deactivating a mailbox

1. Select a mailbox from the mailboxes list view that is not highlighted in any color.
2. Right-click to open the context menu. Point to **Tasks** to open the sub-menu and select **Deactivate mailbox**.
3. The mailbox is deactivated and appears in the list view with a different icon and is highlighted in light blue ■

**i** | **NOTE:** Deactivated mailboxes cannot be archived or restored.

## Migrating a mailbox

1. Select a mailbox from the mailboxes list view.
2. Right-click to open the context menu. Point to **Tasks** to open the sub-menu and select **Migrate mailbox**.



3. Click **Search** to return the list of all mailboxes that are **not** in Address Book Manager but are available in the Microsoft Exchange servers. To reduce the list of mailboxes, you can specify a

search term in the **Look for Name** search box. Only the initial letters of the mailbox *Display Name* can be specified, and wildcards are not supported. The search term is case-insensitive.

4. Select the target mailbox from the result set.
5. Click **Select**. A confirmation dialog appears.
6. Click **Yes** to continue. The source mailbox will be merged with the target mailbox and removed from Address Book Manager. The target mailbox will be imported into Address Book Manager, and all the archived emails that belonged to the source mailbox will now belong to the imported mailbox. You can click **No** to cancel the migration.

## Removing a mailbox

1. Select a mailbox from the mailboxes list view.
2. Right-click to open the context menu. Point to **Tasks** to open the sub-menu and select **Purge mailbox**.
3. The mailbox is removed from the Address Book Manager.

**i** | **NOTE:** You cannot remove a mailbox if it contains at least one email that has been archived. Mailboxes that are highlighted in blue ■ cannot be removed.

## Synchronizing mailbox permissions

1. Select a mailbox from the mailboxes list view.
2. Right-click to open the context menu. Point to **Tasks** to open the sub-menu and select **Synchronize mailbox folder permissions**.
3. The mailbox folders will be synchronized, and a confirmation dialog appears that indicates the number of folders that were successfully synchronized and the number of folders that could not be synchronized.

**i** | **NOTE:** Mailboxes that are highlighted in blue ■ cannot be synchronized.

## Updating a mailbox

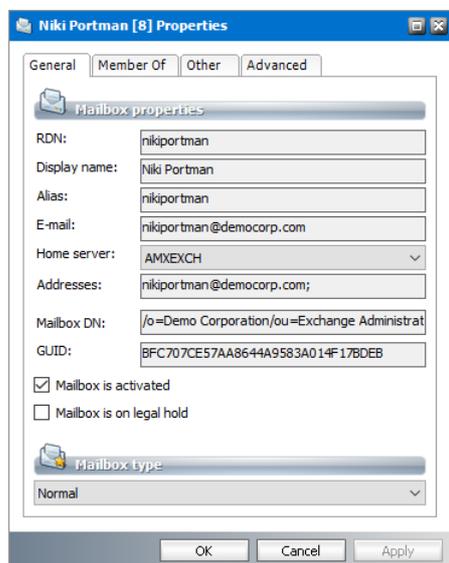
1. Select a server from the server list view.
2. Right-click to open the context menu. Point to **Tasks** to open the sub-menu and select **Update mailbox**.
3. When the selected mailbox is updated successfully, a confirmation message is displayed.

## Managing Mailbox Properties

The properties of each mailbox added to the Address Book Manager can be managed through the Properties dialog box. They are grouped by tabs and each property group is explained in detail below.

## General properties

1. Select a mailbox from the mailboxes list.
2. Right-click to open the context menu and click **Properties**. The *Properties* dialog for the selected mailbox appears and the *General* tab is displayed by default.

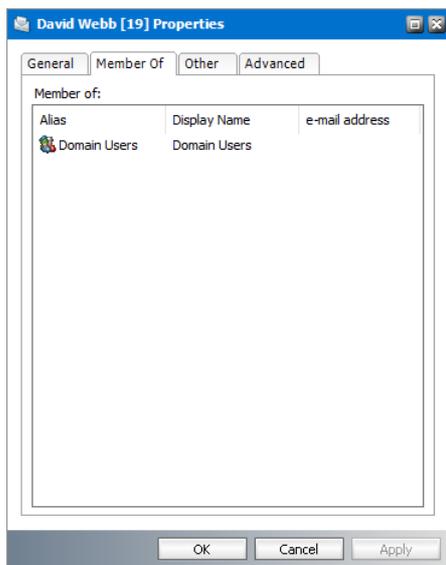


3. The properties in this section are as follows:
  - a. **RDN** - Distinguished name of the recipient.
  - b. **Display Name** - Display name of the recipient.
  - c. **Alias** - Alias of the recipient.
  - d. **Email Address** - Email address of the recipient.
  - e. **Home Server** - Name of the Microsoft Exchange server that contains the mailbox. You can click the drop down and select another Exchange Server as the Home Server. For example, if the user's mailbox is migrated from an on-premise Exchange server to an online Office 365 Exchange server, you can change the Home Server to the Office 365 server only if the server was imported into the Address Book Manager. When you change the Home Server, you must synchronize the Address Book Manager. For more information see [Synchronizing Address Book Manager](#).
  - f. **Addresses** - Collection of email aliases of the recipient.
  - g. **Mailbox DN** - Distinguished name of the mailbox.
  - h. **GUID** - Unique identifier of this mailbox in the Microsoft Exchange server.
  - i. **Mailbox is activated** - When checked the mailbox is fully operation. Uncheck this check box to deactivate the mailbox. The mailbox can also be deactivated by selecting **Deactivate mailbox** from the mailbox context menu **Tasks**.
  - j. **Mailbox is on legal hold** - When checked, the mailbox is on litigation hold and modifications to archived emails are not permitted. When unchecked, the mailbox is not on legal hold.

- k. **Mailbox type** - The type of mailbox. Valid values are **Normal** and **Journal**.
4. Click **OK** to save any changes. Click **Cancel** to discard any changes and close the properties dialog.

## Member Of

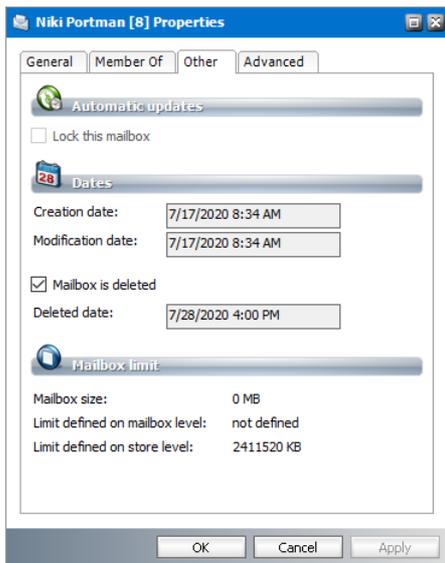
1. Select a mailbox from the mailboxes list.
2. Right-click to open the context menu and click **Properties**. The *Properties* dialog for the selected mailbox appears.
3. Click the **Member Of** tab. A list of groups appears in the *Member of* list box.



4. To view the properties of a group, right click on a selected group and click **Properties**. The *Properties* dialog of the group appears.
5. Click **OK** to save any changes. Click **Cancel** to discard any changes and close the properties dialog.

## Other properties

1. Select a mailbox from the mailboxes list.
2. Right-click to open the context menu and click **Properties**. The *Properties* dialog for the selected mailbox appears.
3. Click the **Others** tab.

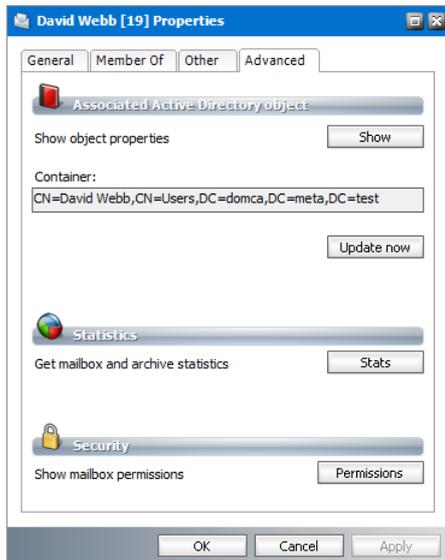


4. The properties in this section are as follows:
  - a. **Lock this mailbox** - When **checked**, the mailbox is set to read-only and the mailbox cannot be updated or synchronized.
  - b. **Creation date** - the date when the mailbox was imported into Address Book Manager.
  - c. **Modification date** - the most recent date when the mailbox was modified
  - d. **Mailbox is deleted** - if the check box is checked, the mailbox is marked as deleted. When you click **Apply** or **OK**, the **Deleted Date** field will indicate the current date and the mailbox is indicated with the  icon. A mailbox can also be marked as deleted by the system when a mailbox update cannot find the Active Directory object specified by the LDAP path but emails in the mailbox were previously archived. When a mailbox update cannot find the Active Directory object specified by the LDAP path and there were no emails that were archived for this mailbox, the mailbox will be permanently deleted from the Address Book.
  - e. **Deleted date** - the date when the system marks the mailbox as deleted.
  - f. **Mailbox size** - size of the mailbox including all its folders as defined in the Microsoft Exchange server.
  - g. **Limit defined on mailbox level** - the limit (in KB) set on the mailbox in the Microsoft Exchange server.
  - h. **Limit defined on store level** - the storage limit (in KB) set on the mailbox in the Microsoft Exchange server. The **Limit defined on mailbox level** has a higher priority.
5. Click **OK** to save any changes. Click **Cancel** to discard any changes and close the properties dialog.

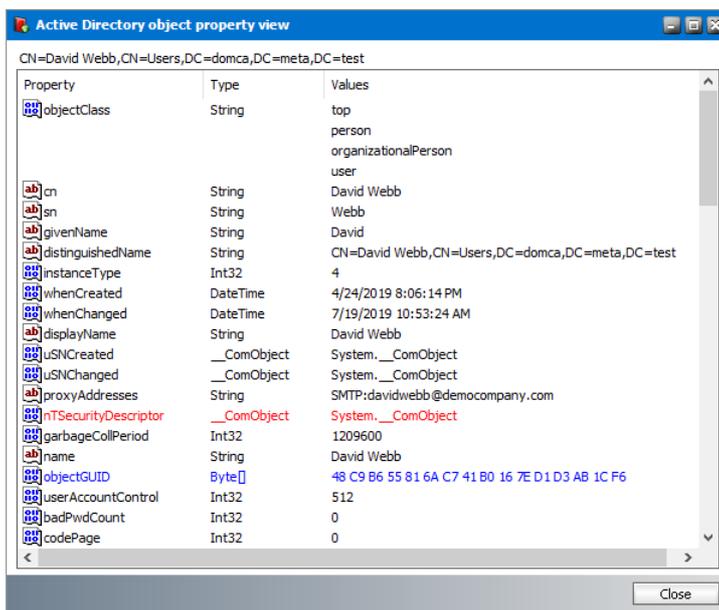
## Advanced properties

1. Select a mailbox from the mailboxes list.

2. Right-click to open the context menu and click **Properties**. The *Properties* dialog for the selected mailbox appears.
3. Click the **Advanced** tab.



4. The properties in this section are as follows:
  - a. **Show object properties** - Click the **Show** button to display more information about the mailbox from the Microsoft Exchange server



- b. **Container** - displays the distinguished name of the LDAP container. Click **Update now** to update the mailbox properties immediately.
- c. **Get mailbox and archive statistics** - Click **Stats** to open the *Mailbox statistics* window where you can check the number of archived or deleted messages in the mailbox folders

Folder	Messages	Deleted messages
Number of folders: 2	7	0
Inbox	5	0
Sent Items	2	0

- d. **Show mailbox permissions** - Click **Permissions** to manage the mailbox permission rights. The same settings are accessible also from *Tools > Mailbox Rights Manager*. For detailed information see the section Mailbox Rights Manager.
5. Click **OK** to save any changes. Click **Cancel** to discard any changes and close the properties dialog.

## Managing Mailbox Permissions

For detailed information about managing permissions for a mailbox, see [Mailbox Rights Manager](#).

## Options

AMAC preferences set through **Options** and **Settings** apply if no specific archive settings are selected. There are many preferences which you may configure to your needs. They include, for instance, compressing of emails and their attachments, setting up the default retention category depending on e.g. legal requirements, activating direct archiving, managing roles for different users etc. Settings having been specified under **Tools > Options** and **Tools > Settings** are used as the default for manual as well as automated archiving.

## Tools/Options

Run **Archive Manager for Exchange** (click **Start/Programs/Metalogix/Archive Manager for Exchange**). In the **Archive Manager for Exchange** click on the **Tools** menu, and then click on **Options** to open the **Options** window. Here, on different tabs you may set your AMAC preferences.

## Server settings

### Server role tab

Archive Manager for Exchange is a product of high scalability and users can decide for various LAN solutions. Besides the simplest solution with one Archive Manager server, more complex configurations are possible, e.g.

- ONE archive server (server assigned Archive server role)

- retrieve server(s) (server(s) assigned Retrieve server role) and/or
- PST import server(s)

All in ONE Location, i.e. Location ID of all servers is “1”.

**i** **NOTE:** In case of large organizations scattered around the globe, Archive Manager for Exchange provides you with the possibility to configure several **Locations**, i.e. several Archive Manager Archive servers distinguished by a unique identifier – the **LocationID**. (For more information on Locations and LAN configurations see the “Full Install Guide for Archive Manager”.)

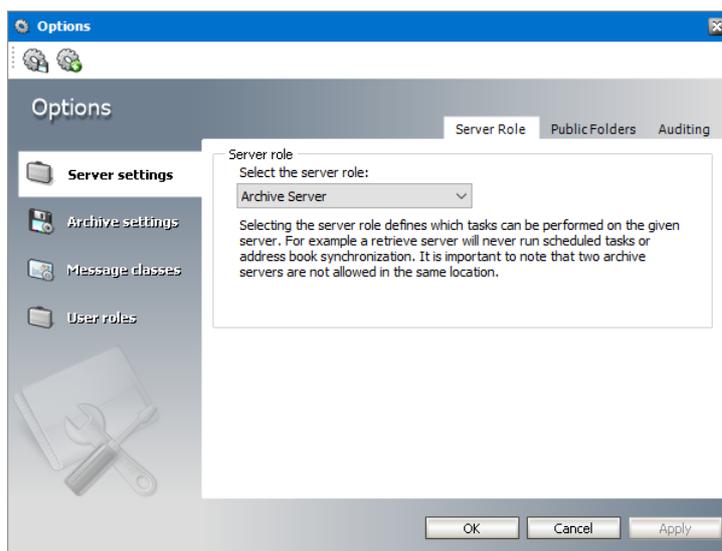
## Recommendation

- When more than 1000 mailboxes are being archived, we recommend dedicating a separate machine as Archive Manager Retrieve server besides the Archive Manager Archive server
- Maximum 3000 mailboxes can be archived with one Archive Manager Archive server. For more mailboxes it is necessary to install another Archive Manager Archive server, i.e. to create a new location with a new location number

As you can see each server has its role in the environment. This server role has to be assigned to the server on this tab in the **Server role** down-drop box. Possible server roles are:

- Archive server (only 1 Archive server per location is allowed)
- Retrieve server
- PST Import server

After you have assigned roles to your servers it is necessary to register them on the Locations tab of the Archive Manager for Exchange (see the section “Locations tab”).



**i** **IMPORTANT:** If there is only 1 Archive Manager for Exchange server in the environment, it has to be assigned ARCHIVE SERVER role.

## Public Folders tab

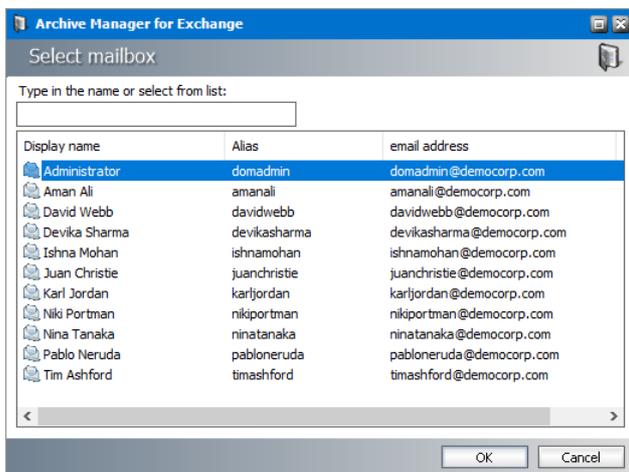
On this tab you may specify the user whose public folders you want to display in **Archive Manager for Exchange**. In the **Public Folder** access down-drop box specify the mailbox which will be used for reading and modifying the public folders.

**i** **IMPORTANT: Public Folder** access is by default set to super-user (in our case **srv\_Exchange**) – so that all public folders could be displayed on the **Public folders** tab (in **Manager** view as well as **Archive** view), and you could assign jobs to them. However, if you plan to assign jobs to public folders of only a specific user it is good to have only his public folders displayed. So - for viewing public folders of a desired user set the “access” to that user.

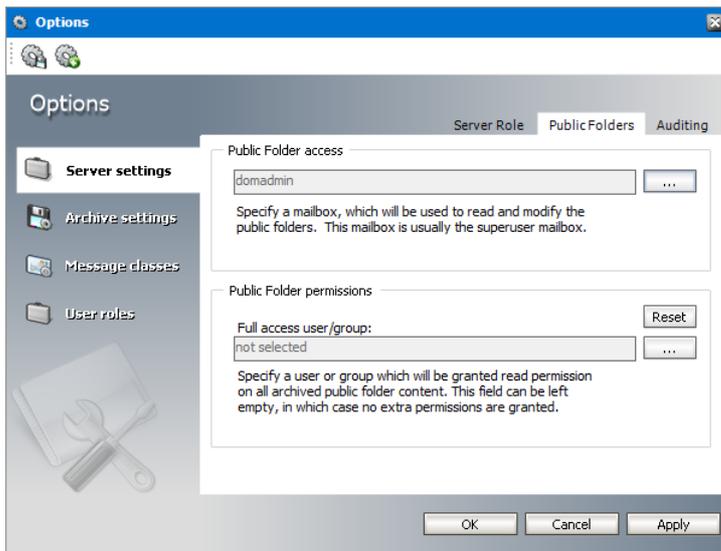
The super-user must be given owner rights over all public folders where content is intended to be archived.

To change the **Public Folder** access mailbox so that only its respective public folders are displayed on the **Public Folders** tabs (in **Manager** view as well as **Archive** view):

1. On the **Tools** menu, click **Options**.
2. In the **Options** window, click on the **Server settings/Public Folders** tab.
3. Click the **Browse** button next to the **Public Folders** access box to open the **Select mailbox** window.



4. Type the respective mailbox name in the offered dialog or select the appropriate user in the list which is displayed in the list box below and click **OK**.



5. Clicking **OK** in the **Options** window to restart the service



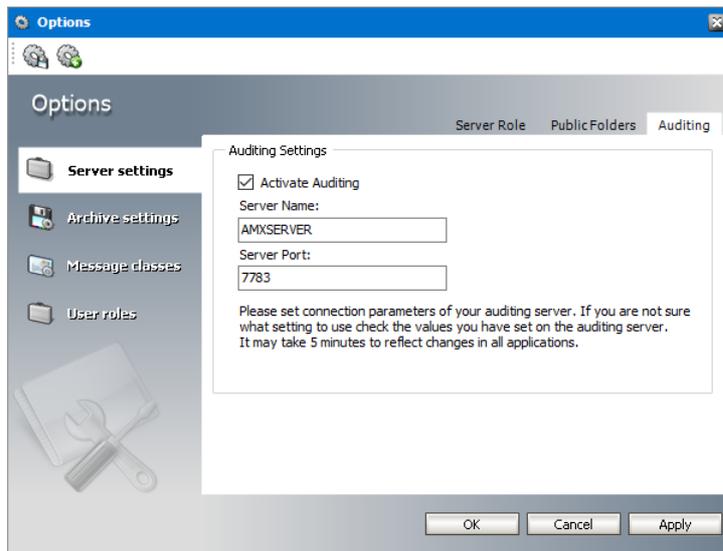
6. Finish by clicking Yes.

**Public Folder permissions** are *not selected* by default. You need to change it only if you want to add permissions (permissions in archive) over the whole public folder hierarchy for a specific user or group. Please note that this permission is applied for OEM storages and for external fulltext engines.

## Auditing tab

If Auditing feature was installed, you need to activate it on this tab. To activate auditing, check **Activate Auditing** check box. In the **Server Name** enter the name of the machine where the Auditing feature is installed and specify the Server Port (the default port is 7783). Click **Apply**.

**i** | **NOTE:** For more information on Auditing see the **Auditing** manual.



## Archive settings

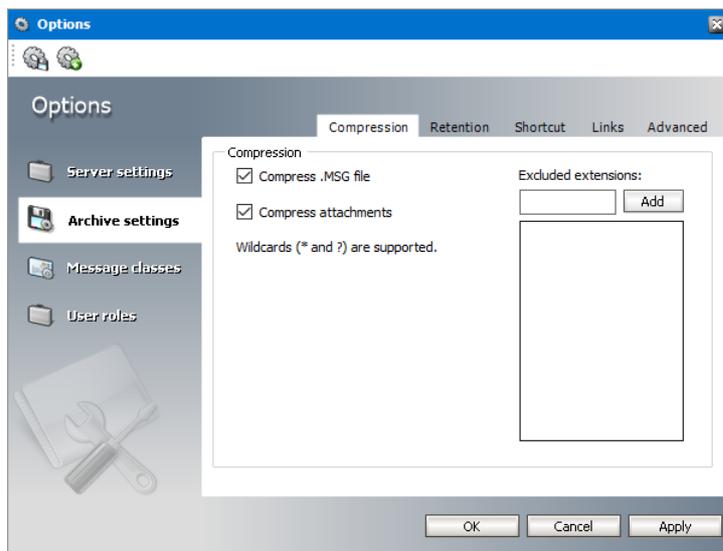
### Compression tab

On this tab you may specify your compression criteria. Compressing is then done “on the fly”.

#### To specify compression criteria:

1. On the **Tools** menu, click **Options**.
2. In the **Options** window, click on the **Archive settings** tab.
3. To compress .MSG files, simply select the **Compress .MSG** check box. To compress attachments, select the **Compress attachments** check box. If you have decided to compress attachments, yet wish to exclude some types of attachments from compression, you can specify that in the **Excluded extensions** text box – the respective attachments will not be compressed (such as .zip files etc). Simply enter the respective extension in the text box and click **Add**. Do not forget to finish by clicking **OK**.

**i** | **NOTE:** When specifying **Excluded extensions** you can use the following wild card \* which stands for any number of characters and ? stands for any single character.



## Retention tab

For legal reasons some emails must remain retrievable for many years. Our email archiving solution uses the Hierarchical Storage Management system (HSM). HSM offers the possibility to organize documents in a logical way, e.g. some documents need to be stored for a longer period than the others. In the HSM system you may define different **retention categories** for each type of document (for example, one retention category for short-term documents and other retention category for long-term documents).

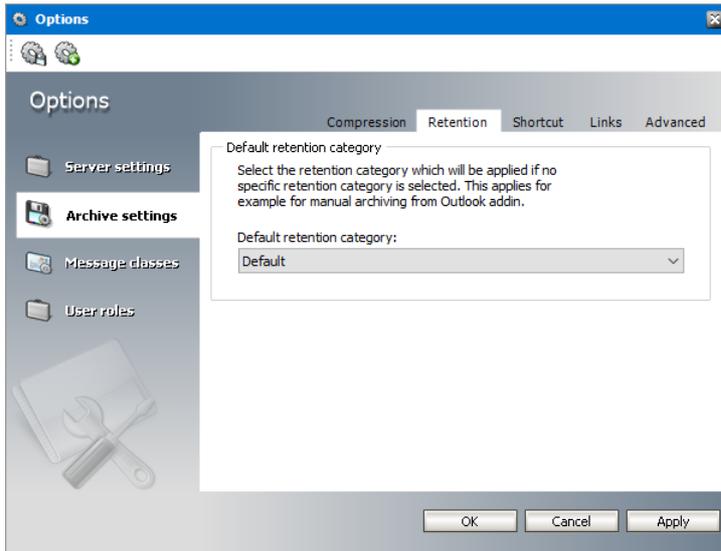
On this tab you may choose which retention category should be used as default for archiving items if no specific retention category is chosen. It usually applies for manual archiving using **Archive Manager Client Addin**.

However, every group or user can have its own default retention category assigned. This can be done on the **Manager view/Settings/Group level retention** tab (see the section **Group level retention** in the [Settings tab](#) chapter). Retention category set as default on this tab applies also to AMAC preferences on the aforementioned tab – and vice versa.

**i** **NOTE:** If you are running **Archive Manager for Exchange** for the first time, just one retention category is available. It is the default retention category created by the setup. Otherwise you can choose from all retention categories from the previous settings and you can also create your own on the **Retention** tab of the **Manager** view.

For more information regarding retention categories see the topic [Retention tab](#).

You may still archive email items under different retention categories (not the default one). That can be specified through jobs, since for each job you may assign either a desired retention category or the default one. This topic will be described later in the “Jobs tab” section of the “Manager view” chapter. Moreover, it is possible to choose the desired retention categories for an individual item when it is archived manually in the Archive Manager for Exchange (see the “Archive view” chapter).



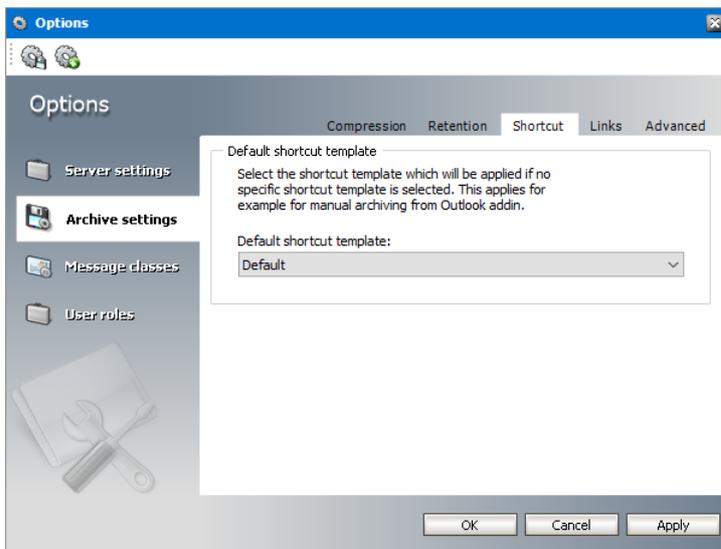
## Shortcut tab

Here you can set the layout of archived emails' shortcuts, i.e. you can set how the archived emails will be displayed in the Outlook preview pane. The layout and the type of shortcut are defined through templates. The template specified on this tab will be used in cases when no other shortcut template settings apply.

**i** **NOTE:** Shortcut templates can be created under **Manager view/Settings/Shortcut templates**. Then they can be assigned to different users or groups under **Manager view/Settings/Shortcut to user assignment**.

In the **Default shortcut template** drop down box select a shortcut template from the available ones. Then click **Apply**.

Default shortcut template can be set also under **Manager view/Settings/Shortcut to user assignment**. If the default shortcut template is changed there it is changed also on this tab and vice-versa.



## Links tab

If you plan to use attachment links in shortcuts (either **Create links for attachments** or **Generate an HTML shortcut from template** option from the previous tab) you need to configure the link generator server on this tab.

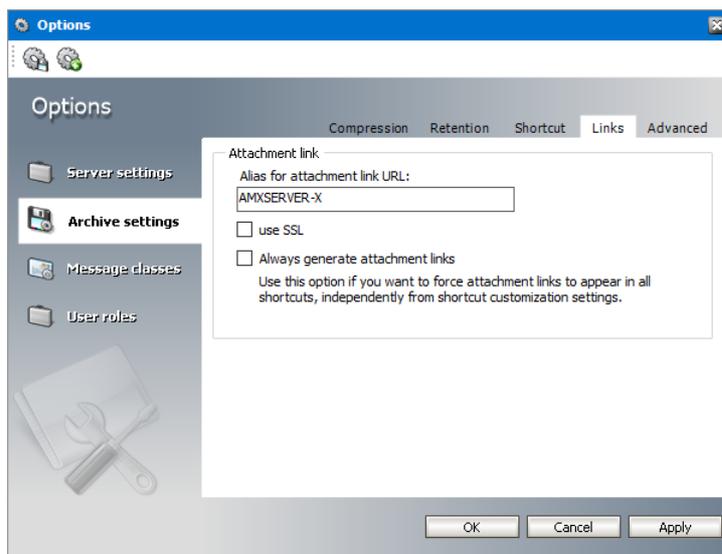
In the **Alias for attachment link URL** enter the alias of your Archive Manager Archive server - the link generator server name. The **ALIAS** of your Archive Manager server can be accessed both from inside and outside the LAN.

**i** **NOTE:** We recommend creating an ALIAS (DNS alias) for the Archive Manager Archive server. It will serve as a virtual name and changing the physical name of the Archive server will not affect the attachment links.

If the https channel will be used, check the **use SSL** check box.

Check the **Always generate attachment links** check box to make the attachment accessible in all shortcuts. Independent of the settings specified on the previous tab (Shortcut tab), links to attachments will be always accessible from the *Preview* pane. They will bear the name of the attachment with an **.html** extension.

After modifying these settings click **Apply**. Then click **Yes** to restart the relevant service.



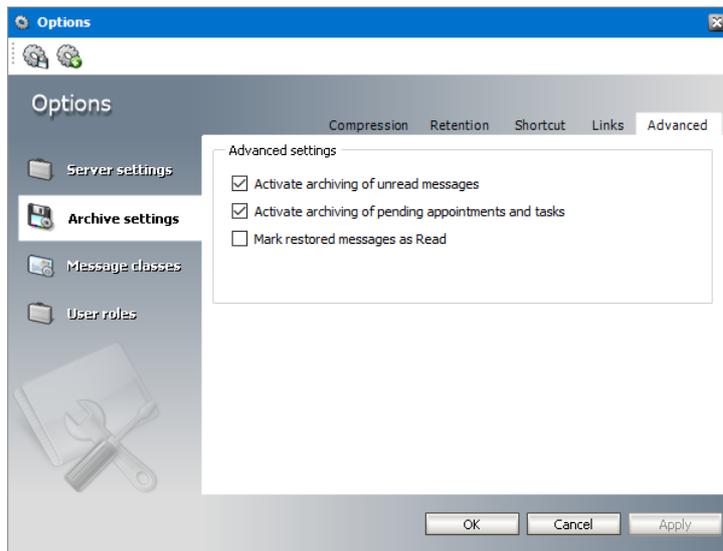
## Advanced tab

This tab offers additional archive settings:

**Activate archiving of unread messages** - clear the check box if you do not want to archive unread emails.

**Activate archiving of pending appointments and tasks** - clear the check box if you do not want to archive unfinished appointments and/or tasks.

**Mark restored messages as Read** - select the check box if you want to mark restored emails as **Read**.



## Message Classes

### Supported Classes tab

Microsoft Exchange stores emails and other objects in its database. We are referring to these objects as items. Each item has its own message class, which defines the type of the item: message, post, appointment, etc. Since the handling of these items is different, different shortcuts are created for each item type. By default only some message classes are archived (IPM.Note, IPM.Post, IPM.Document etc.). Additional item types to be archived can be defined on this tab.

Message Class	Description
IPM.Note	message
IPM.Post	message posted to a folder
IPM.Fax	a fax message
IPM.Document	a file added to the folder (the base class never appears, it always contains the file type, e.g. IPM.Note.Document.Word.8)
IPM.Appointment	calendar item; a recurring calendar item
IPM.Task	an Outlook task
IPM.Contact	an Outlook contact
IPM.Activity	an Outlook journal message

IPM.StickyNote	an Outlook sticky note
REPORT.IPM.Schedule.Meeting.Request	a meeting request

For a complete list of message classes, please refer to:

<http://msdn.microsoft.com/en-us/library/aa204771.aspx>

The following message classes and its subclasses are supported message classes by default, i.e. they can be archived by Archive Manager for Exchange:

- IPM.Note,
- IPM.Post,
- IPM.Document,
- IPM.Fax
- IPM.Appointment
- IPM.Task
- IPM.Contact

**i** | **NOTE:** Make sure they are not deactivated on the **Deactivated Classes** tab, if you want to archive them.

Archiving of calendar items (IPM.Appointment), contact items (IPM.Contact) and task items (IPM.Task) is supported with some limitations. When a shortcut is created from such item, it becomes read-only which prevents further modification of the item. It can only be modified by Archive Manager Outlook Addin. If these items change constantly, we recommend archiving these items with “Keep the original email” or “Delay shortcut creation” option (see “Retention tab” part of the manual). Please note that recurring appointments and tasks are not archived.

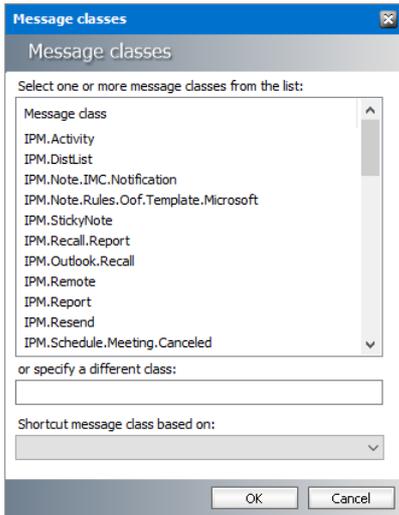
If appointments are planned to be archived, it is a good idea to deactivate archiving of appointments which are not finished. It can be set on the **Tools/Options/Archive settings/Advanced** tab (**Deactivate not finished appointment and task archivation** option).

In addition to the default supported message classes you can define additional message classes which should be archived:

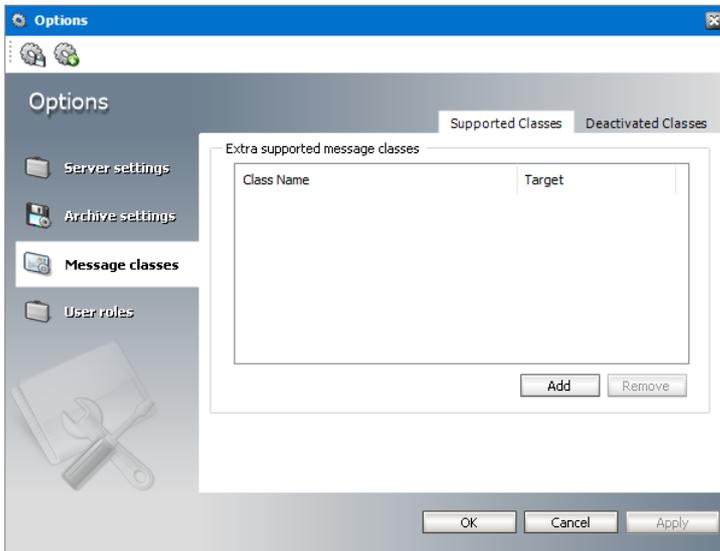
1. On the **Tools** menu click on **Options**.
2. In the **Options** window, click on the **Message Classes** tab.
3. Click the **Add** button to open the message classes list. Select one or more message classes which you want to archive. You can also specify different message class in the text box below the list.

By default there is no need to fill in the **Shortcut message class based on** field. Leave this field blank or choose one option from the down-drop list. In this way you will define which type of shortcut will be created when the selected message class is archived. Please note that

specifying of a new shortcut message class can have undesired effects. To get more information about this option, contact our support.



4. Then click **OK**.



5. Then click **Apply**.

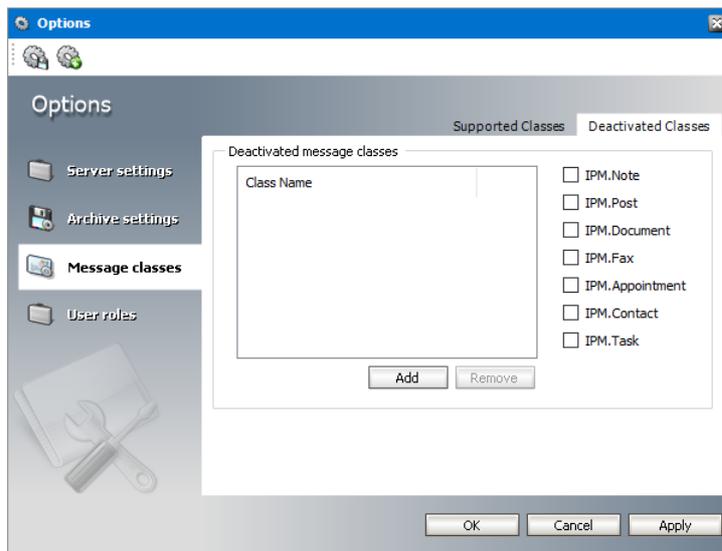
6. A message box appears that informs you that you have to restart **MamExHandler** service



## Deactivated classes tab

Classes which you specify on this tab will not be archived. You can either check the desired message class(es) or click the **Add** button to choose from the list of additional message classes. You can also specify different message class in the text box below the list. When you have chosen the desired message classes in the list, click **OK**, then click **Apply** on the **Deactivated Classes** tab.

**i** **NOTE:** If a message class is specified on the Supported Classes tab as well as on the **Deactivated Classes** tab, it will NOT be archived.

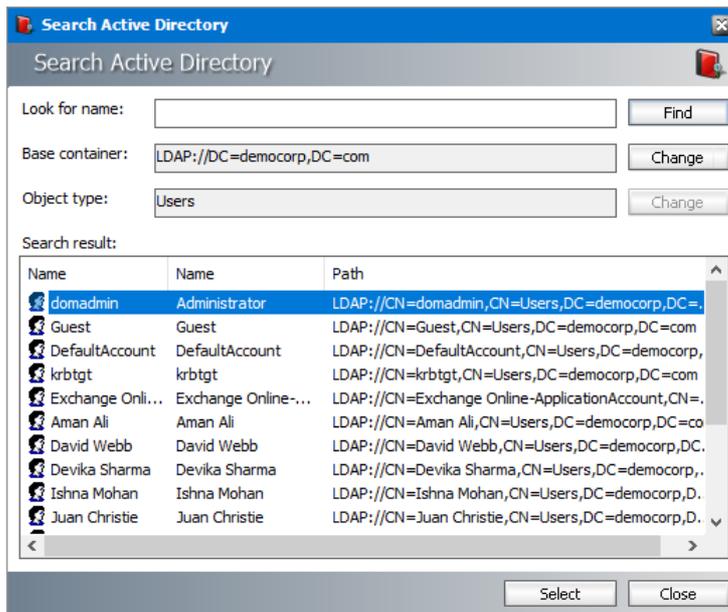


## User Roles

As default, only the super-user, which was specified during the Archive Manager for Exchange installation, has log on permissions to Archive Manager for Exchange. On this tab you can add other users which will be allowed to log on to the Archive Manager for Exchange server.

### To add a new on-premise Exchange user:

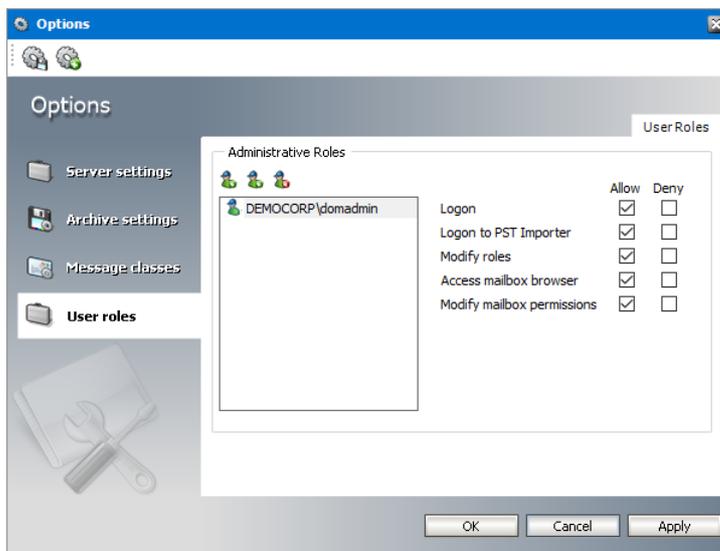
1. Click the **Add User** icon or right-click inside the **User Roles** tab and select **Add** from the context menu. To add an Office 365 user, click the **Add Office 365 user** icon.
2. In the **Search Active Directory** pop-up dialog click **Find**. Locate the desired user in the list and click **Select**.



3. The user will be displayed on the **User Roles** tab.

## To grant log on permissions to a user:

1. Select the user.



2. Select the check box under the **Allow** column to grant the following permissions, or select the check box under the **Deny** column to deny the following permissions:

- Logon** - user will be able to logon to the Archive Manager for Exchange and manage Archive Manager
- Logon to PST Importer** – user will be able to launch PST Importer
- Modify roles** – user will be able to manage user roles on this tab
- Access mailbox browser** – user will have access to archiving/restoring, i.e. the user will be able to enter the Archive view

- e. **Modify mailbox permission** – user will be able to modify permissions in Mailbox Rights Manager.

**i** | **NOTE:** If neither **Allow** nor **Deny** is checked, the role is denied.

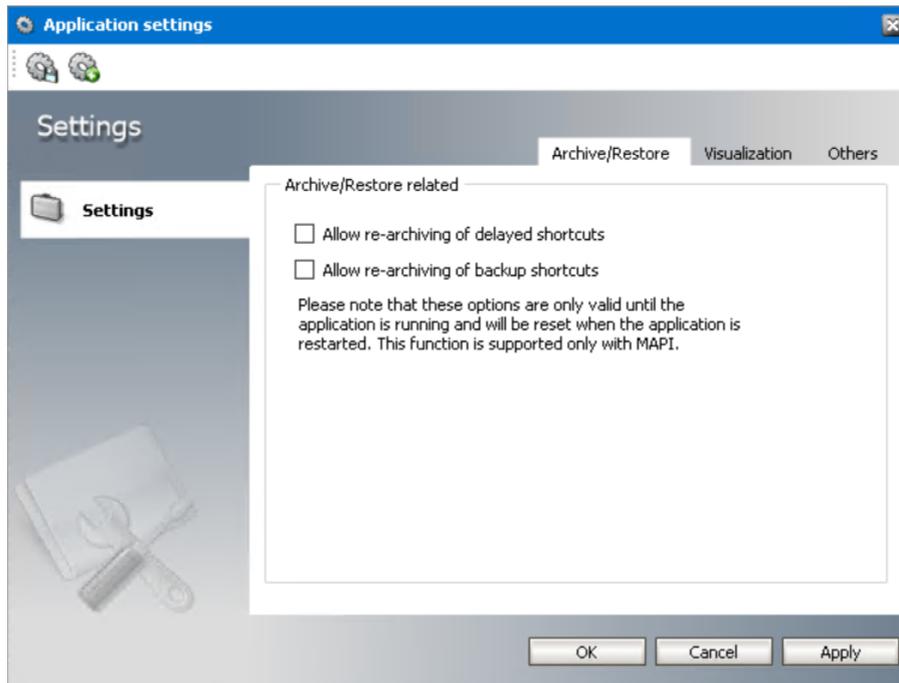
## Settings

In addition to AMAC preferences specified under the **Tools/Options** as described above there are more AMAC preferences available under **Tools/Settings**. AMAC preferences apply if no specific archive settings are selected.

Run **Archive Manager for Exchange** (click **Start/Programs/Metalogix/Archive Manager for Exchange**). In the **Archive Manager for Exchange** window click on the **Tools** menu, and then click on **Settings** to open the **Settings** window.

## Archive/Restore tab

On this tab you may choose to re-archive delayed or backup shortcuts



Usually, when archived with Archive Manager, emails are replaced with shortcuts on the Microsoft Exchange Server. In some cases you may have decided to archive the emails and at the same time not to create shortcuts for them or delay the shortcut creation (this is done via retention categories, see the section [Retention categories and their usage](#) ). In such cases the emails are copied to archive and remain unchanged also in Microsoft Exchange Server (no shortcuts are created). In specific cases you may want to re-archive such items to save any possible modifications made after archiving. Should you wish to re-archive these items (possible only manually), it is necessary to allow it:

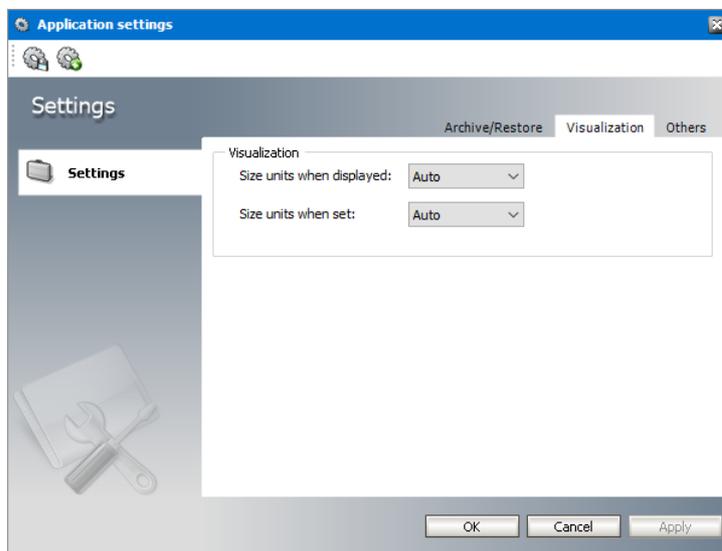
**Allow re-archiving of delayed shortcuts is checked** – it will be possible to manually re-archive emails which have been already archived via retention category with “Delay shortcut creation” settings.

**Allow re-archiving of backup shortcuts is checked** – it will be possible to manually re-archive items which have been already archived via retention category with “Keep original email” settings.

**i** **NOTE:** Both above mentioned options are only valid while the **Archive Manager for Exchange** is running. When the application is restarted, these options are reset. This function is supported only with MAPI.

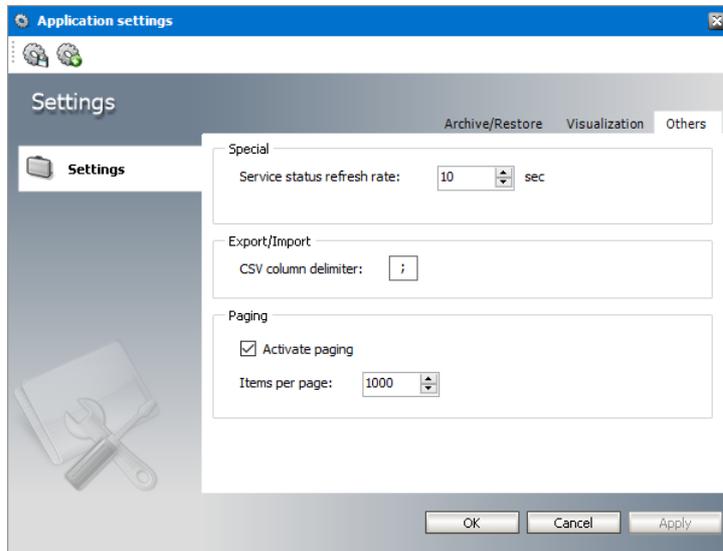
## Visualization tab

If you select **Auto** in the **Size units when displayed** or **Size units when set** dropdown menus, then the size of the files will be displayed correspondingly: in B, KB, or in MB.



# Others tab

The following AMAC preferences can be managed from this tab:



## Special

**Service status refresh rate** - The default is 10 seconds. This means that every 10 seconds the status of the services will be checked and the list of services displayed in the *Status* view will be refreshed.

## Export/Import

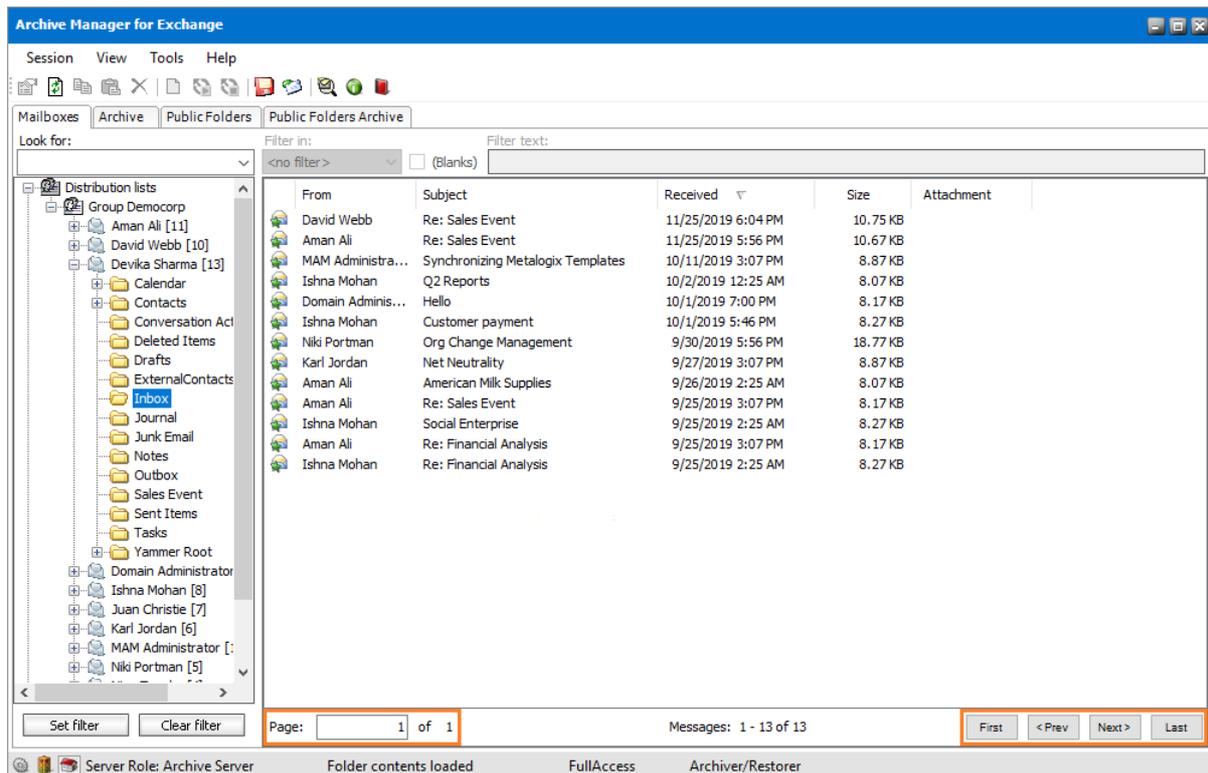
**CSV column delimiter** - The column delimiter can be set to a comma (,) or to a semicolon (;) for all export or import processes. You should check your MS Office settings first, and then set it accordingly.

## Paging

Paging activates a faster response time when loading large sets of items in the *Mailboxes*, *Archives*, *Public Folders* and *Public Folders Archive* lists. You can set how many items can be displayed on one page.

**Activate paging** - select this check box to activate paging.

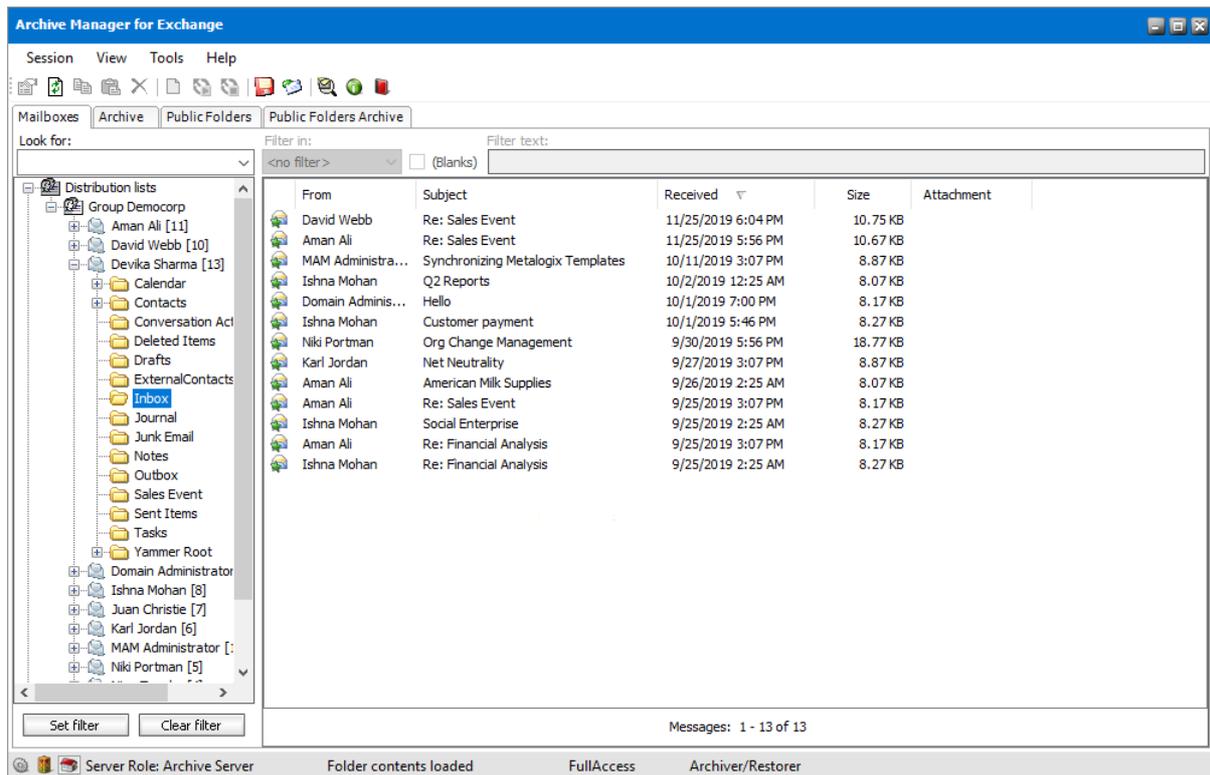
**Items per page** - the number of items that are displayed in each set or page. The default value is 1000.



When paging is activated, the current page is displayed in the **Page** field at the bottom of the list. The administrator can navigate the pages in one of two ways: by entering a specific page in the **Page** field or by clicking the **First**, **Prev** (previous), **Next** or **Last** buttons to sequentially iterate through the pages.

Consider the scenario where each mailbox has over 50,000 emails items. Listing all the emails at once would require a significant amount of time. With paging activated, only a part of the list is displayed with navigation aids at the bottom of the list. When the administrator navigates through the pages, only a subset of the list is displayed and the time required to display the subset is greatly reduced.

If the average set of email items per user is less that 1000, you may choose to deactivate this feature. The navigation aids will not be displayed at the bottom of the list as shown below.



Paging is activated by default and we recommend that you should keep paging activated.

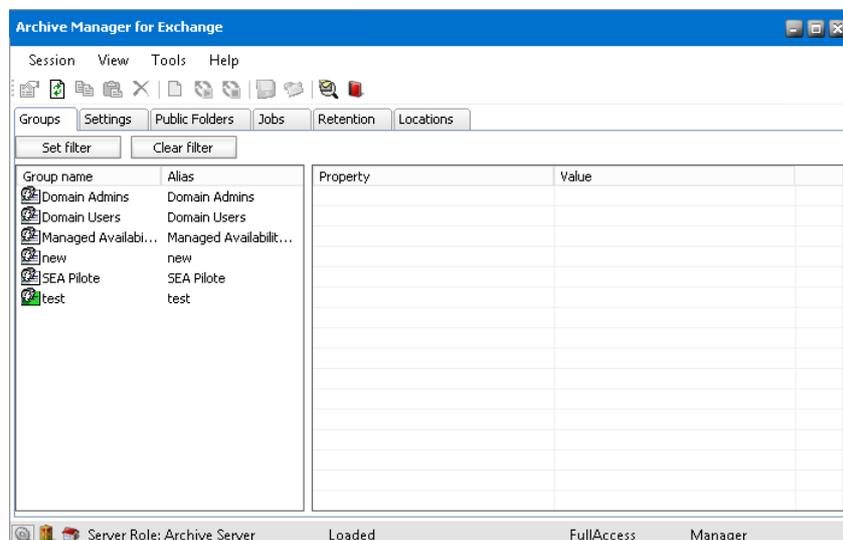
## Manager view

Manager view is an important part of **Archive Manager for Exchange**. In this view you may define the type of jobs used for automated archiving; global parameters; you may set automated email archiving not only for groups but for individual users (mailboxes) as well, etc. All such settings can be specified on the following tabs: **Groups**, **Settings**, **Public folders**, **Jobs**, **Retention** and **Locations**.

Automated archiving is done via jobs. You, therefore, first need to define jobs (see [Jobs tab](#)). With jobs, archiving is done in the background with predefined settings. We will get to that later. Let us now describe what the above-mentioned tabs are used for.

### Groups tab

By clicking on the **Groups** tab a list of all synchronized groups will be displayed in the left pane. At times when you only want to display some of the groups, it is good to use a filter, especially when the list of synchronized groups is too long.



On the **Groups** tab you may set your own archiving criteria for each group. **Double-click** the desired group to open its **Properties** window. Then, in the **Properties** window, set your criteria for archiving that specific group on its **General**, **Scheduler**, **Folders**, **Classes** and **Script** tabs. (See the section [Setting criteria for group archiving](#).)

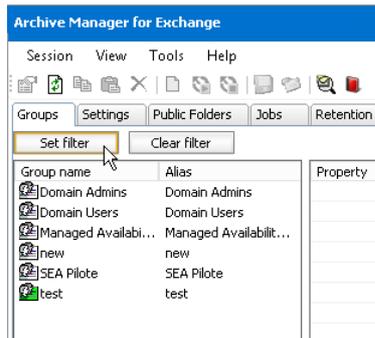
Let us first describe how to display only desired groups.

# How to set a filter to display only desired groups

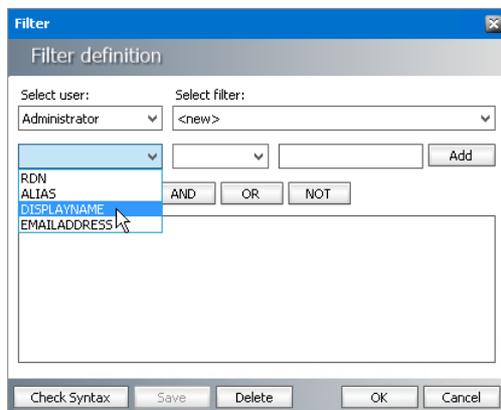
On the **Groups** tab you may have a large number of groups displayed. To display only the desired ones, use filters while specifying multiple logical conditions.

## To create a filter, follow these steps:

1. In **Manager** view on the **Groups** tab, click on the **Set filter** button. The **Filter** window opens.



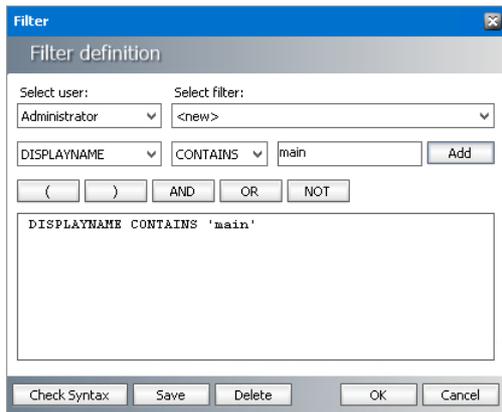
2. Select any or none of the following: RDN, ALIAS, DISPLAYNAME, or EMAILADDRESS in the first dropdown menu; then select any or none of the following: =, STARTSWITH, ENDSWITH, or CONTAINS in the second dropdown menu; and then enter text in the text box next to the **Add** button. Then click **Add**.



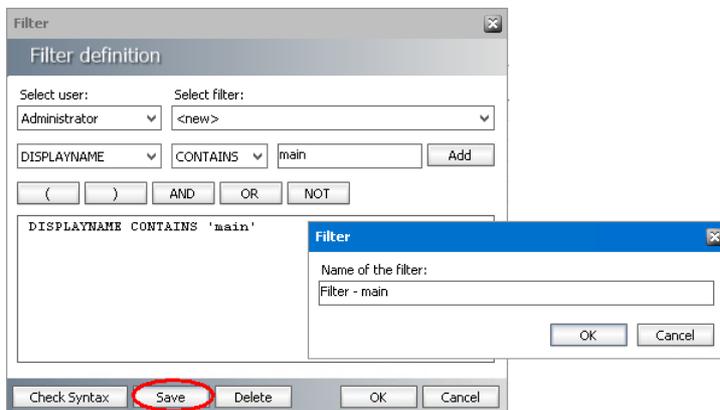
**EXAMPLE:** If you select DISPLAYNAME in the first drop-down menu; CONTAINS in the second dropdown menu; and if you enter 'act' in the third dropdown menu located next to the **Add** button, then you have created the following filter: DISPLAYNAME CONTAINS 'act'. With this filter all groups with DISPLAYNAME containing 'act' will be displayed on the **Groups** tab.

By clicking the **Add** button the filter will be displayed in the text box below, as seen on the following figure.

You can even check the syntax by clicking on the **Check Syntax** button.



3. Click **Save**.
4. If the filter you have created is a new one then, upon clicking on the **Save** button, another dialog window opens where you can enter the name in the **Name of the filter** text box, e.g. Filter 'act'. Confirm by clicking **OK**. A filtered list of groups will be displayed on the **Groups** tab. (i.e. groups whose DISPLAYNAME contains 'act')

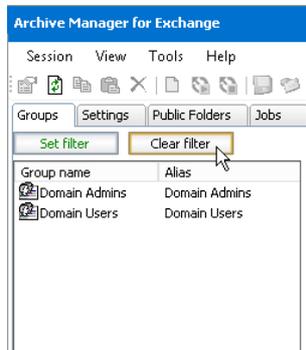


The figure below shows only those groups whose DISPLAYNAME contains 'act' (Filter 'act' from the above mentioned example).

**i** **NOTE:** Instead of creating a filter you may want to use someone else's. In that case, upon clicking on the **Set filter** button select the desired name in the **Select user** drop-down menu and the desired filter in the **Select filter** drop-down menu. The selected filter will be displayed in the text box below. Confirm by clicking **OK** in the **Filter** window.

## How to remove a filter

On the **Groups** tab in **Manager** view you have an option to set a filter to display only groups meeting the desired criteria. Having set a filter, the **Set filter** button turns green (see below).



To remove a previously set filter, simply click on the **Clear filter** button. The list of all synchronized groups will be displayed again and the **Set filter** button turns black.

## Setting criteria for group archiving

When deciding to archive a desired group, specify the criteria according to which emails of that group's members will be archived. You will do that through properties of the respective group.

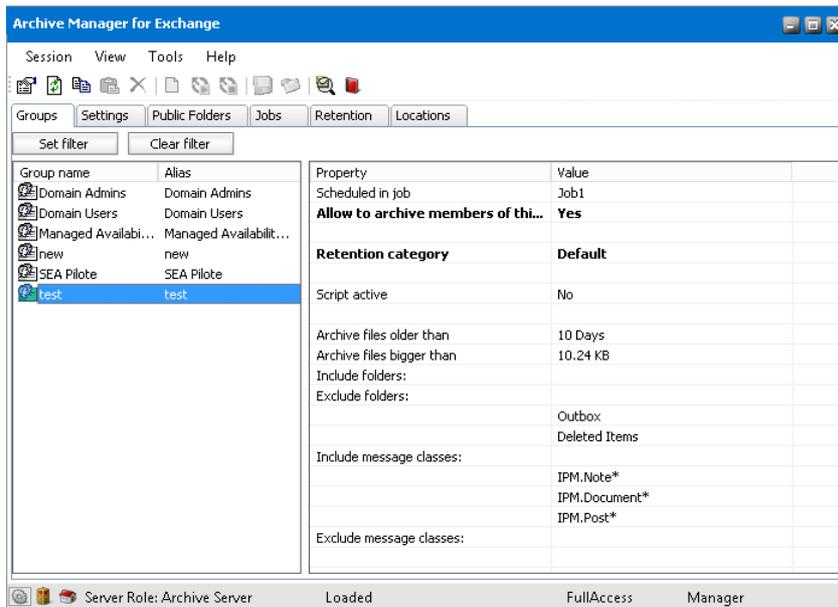
So, first switch to **Manager** view, and then click on the **Groups** tab. In the left pane choose a group, whose members' emails you plan to archive.

There are three ways of opening the **Properties** window:

- Double-click the desired group to open its Properties window,
- Right-click the desired group and then, in the context menu, select **Properties** to open its Properties window,
- Select the desired group and then click on the **Properties** icon on the toolbar to open its Properties window.

In the displayed **Properties** window of the desired group you may set your criteria on the **General**, **Scheduler**, **Folders**, **Classes**, and the **Script** tabs.

On the following figure you will see a list of groups displayed in the left pane. If you select a group, its properties will be displayed in the right pane.



**NOTE:** The icons of groups activated for archiving are displayed in green.

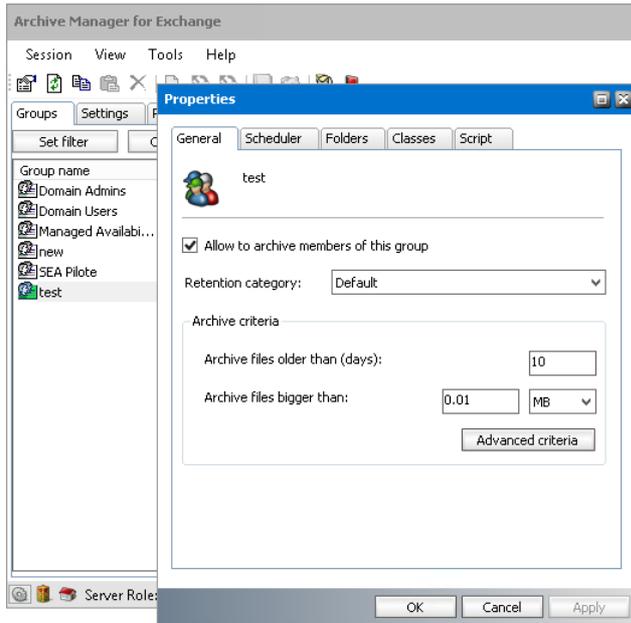
## General tab

On this tab you have an option to activate archiving for a desired group. Here you may specify a period following which messages will be archived by using a pre-defined job. You can also specify a limit-value for the files so that files exceeding that limit-value are archived.

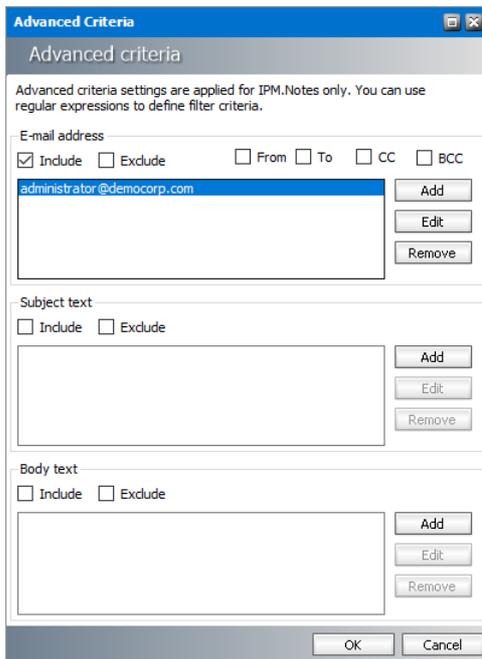
### To activate archiving for a group:

1. In **Manager** view click on the **Groups** tab. In the left pane double-click the desired group. The **Properties** window opens.
2. In the **Properties** window, click on the **General** tab.
3. To activate archiving for this group, select the **Allow to archive** check box. In the **Retention category** down-drop box you can select a retention category which will be used for the group archiving. This retention category can be DIFFERENT from the one assigned to a job that will be in charge of the group. (The relevant job is specified on the scheduler tab.) This allows you to have several groups archived via the same job and at the same time each group being archived with specific retention category. Should you select the Use job settings option, the retention category of the job will be used.
4. In the **Archive files older than (days)** text box you can enter a period following which messages will be archived.
5. In the **Archive files bigger than** text box you can enter the size of the messages to be archived; please do not forget to select the proper item from the dropdown list in order to specify their size either in B, KB, or MB.

**EXAMPLE:** On the following figure we set archiving of messages older than 10 days and exceeding 0.01 MB.



- The **Advanced criteria** give user opportunity to set filter for e-mails (IPM.Note) based on the e-mail address, subject and body. E-mails satisfying the given criteria will be excluded from archiving or only the e-mails satisfying the given criteria will be archived by the job set for that group.



- Finish by clicking **Apply** and then **OK**.

Upon activating a group you need to assign it a job that will do the archiving in the background (see the section “Jobs tab”).

## Scheduler tab

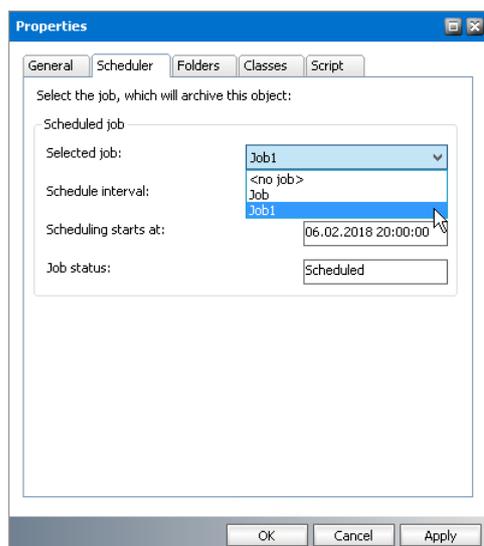
On this tab you need to specify the desired job for archiving. Automated archiving is done via jobs. Jobs, however, need to be specified up-front on the Jobs tab. Therefore, if no jobs have been defined yet, do so first (see “How to create a job”).

Once jobs are defined on the **Jobs** tab, you may select one.

### To assign a job to the desired group:

1. In **Manager** view click on the **Groups** tab. In the left pane double-click a desired group. The Properties window opens.
2. In the **Properties** window click on the **Scheduler** tab.
3. In the **Selected job** dropdown list select a job you prefer for archiving, for instance *SAN archiving*.

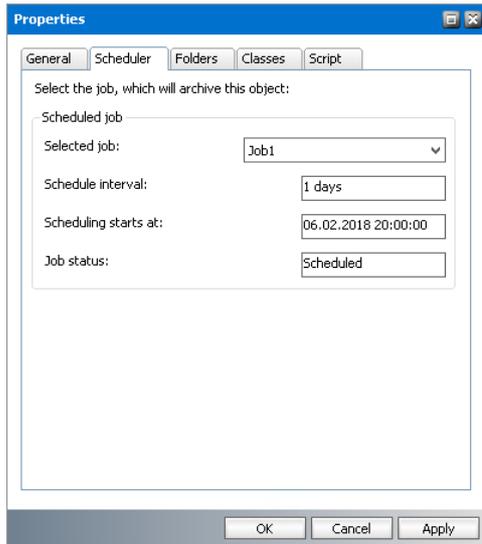
**i** | **NOTE:** If no jobs are created, the dropdown list is empty.



4. Upon selecting a job, the **Scheduling starts at** box, the **Schedule interval (in days)** box, as well as the **Job status** box are automatically filled in with the settings of that specific job.

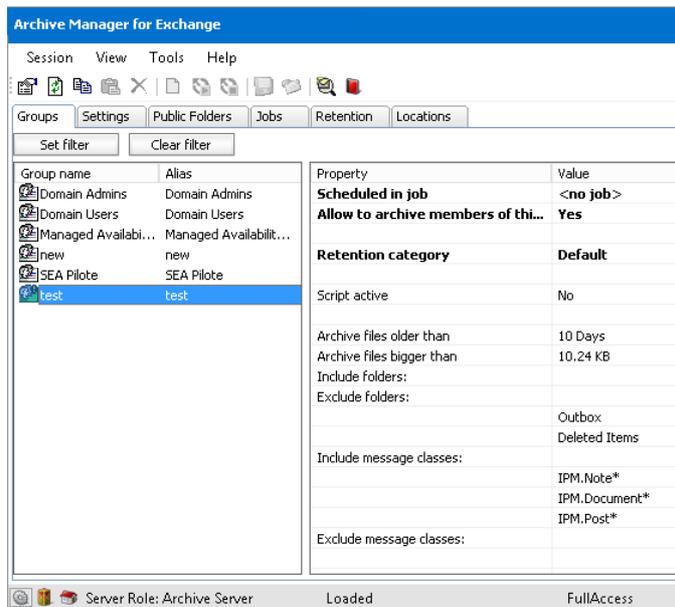
**EXAMPLE:** On the following figure a job called SAN archiving has been selected. According to that job, groups scheduled for archiving with SAN archiving will be archived every day at 6:45:00 PM as of December 18th, 2006. The status of that job is Scheduled, which means that the job is currently running.

**i** | **NOTE:** When the status of a job is Stopped, the job is put on hold and needs to be “turned on” (Scheduled) to run at the predefined hour. A job’s status (Stopped, Scheduled) can be changed on the Jobs tab.



5. Click **Apply** and then **OK**.

**i** **NOTE:** On the figure below you may notice that one group (e.g. testgroup1) is displayed green with an exclamation mark (!). It notifies the administrator that this group is activated for archiving, although no job is assigned to it.



## Exclude tab

You may have activated and scheduled a group for automated archiving, yet you might want to exclude some of the folders and their content from being archived or define folders to be processed. That can be specified on the **Folders** tab in the **Properties** window of the respective group. Use regular expressions to exclude custom folders based on folder name or path.

## To exclude folders from automated archiving:

1. In **Manager** view click on the **Groups** tab. In the left pane double-click the desired group. The *Properties* window opens.

2. Click on the **Folders** tab. Here you can either:

- **include** certain folders in automated archiving

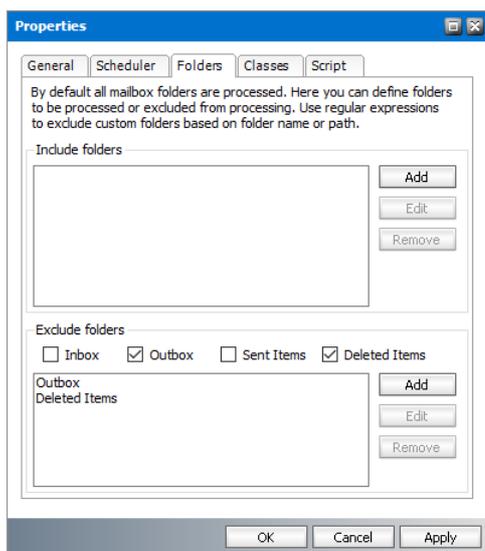
Be aware that if some folder(s) are listed in Include folders section, NO OTHER folders will be archived. All other folders will be automatically excluded from archiving. When adding folders, wildcards can be used – see further.

or

- **exclude** certain folders from automated archiving

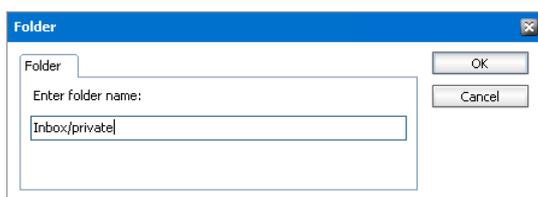
It is possible to check folders in the list (Inbox, Outbox, Sent Items and Deleted Items) or define custom folders. When defining custom folders, also wildcards can be used – see further.

**i** | **IMPORTANT:** If you exclude a folder from automated archiving, then its subfolders will NOT be archived either.



3. When adding folders either in Include or Exclude section, click on the Add button. In the Folder window that opens, enter the folder name or path.

**i** | **NOTE:** As a path separator use a slash “/”.



# Wildcards

Asterisk (\*) has a specific function in the **Include** section. Three basic scenarios apply:

a) <folder>

If only folder is specified (e.g. Inbox, Export/marketing...), it will be archived, but its subfolder will not be archived.

b) <folder>/\*

If folder is followed by a slash with asterisk „/\*“ (e.g. Inbox/\*, Export/marketing/\*...), only subfolders will be archived, NOT the given folder.

c) <folder>\*

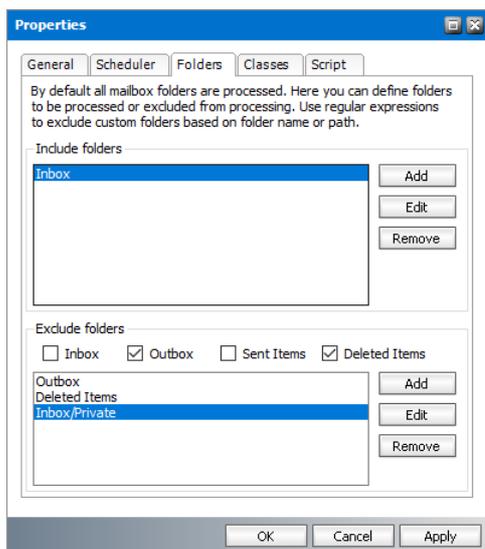
If folder is directly followed by the asterisk „\*“ (e.g. Inbox\*, Export/marketing\*...), both folder and its subfolders will be archived.

**EXAMPLE:** In the example on the figure below, the configuration is the following:

Include folders: **Inbox\***

Exclude folders: **Inbox/private**

This means that **Inbox** and all its subfolders will be archived, except the **private** subfolder.



4. Click **Apply** and finish by clicking **OK**. The respective folders will be excluded from automated archiving.

You may of course review your decision. In that case deselect the respective check-box, or simply select the respective folders in the **Custom folders** list-box and then click on the **Remove** button. Do not forget to click **Apply** and **OK**.

## Classes tab

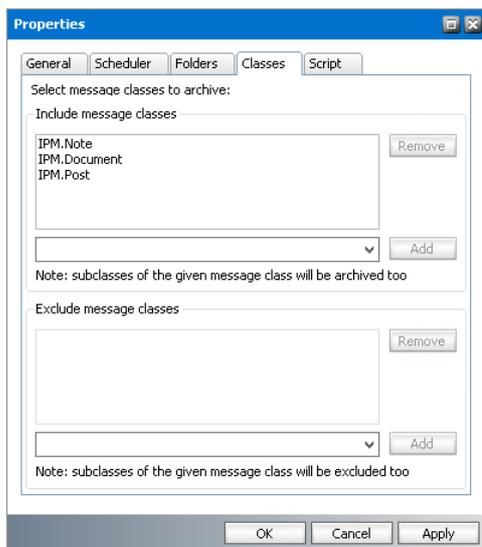
On this tab you may specify which types of email items will be automatically archived/excluded in mailboxes of a given group.

### To select message classes:

1. In **Manager** view click on the **Groups** tab. In the left pane double-click the desired group. The **Properties** window opens.
2. Click on the **Classes** tab.
3. There are three items selected by default for archiving: IPM.Note (email), IPM.Post (Note in Outlook), IPM.Document (OLE-documents). To select additional ones, click on the down arrow next to the **Add** button to open the dropdown menu.

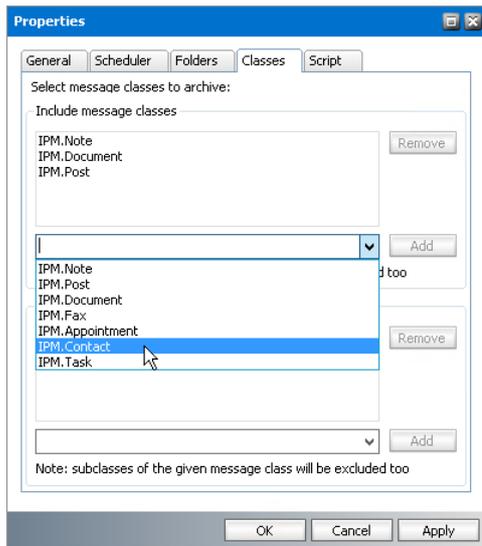
Similarly, you can also define message classes that will be excluded from archiving.

**i** | **NOTE:** If the **Message classes** list is empty, the IPM.Note is added automatically! In such a case, only IPM.Note will be archived.



4. Select the desired item from the help-list or type in the message class you wish to include.

**i** | **IMPORTANT:** You can enter any message class on this tab. However, only those message classes which are allowed to be archived on the global level will be actually archived. For more information see [Message Classes](#).



5. Click on the **Add** button. The respective item will be added to the list in the **Message classes** box.
6. Click **Apply** and then **OK**.

Message classes specified on this tab will be archived only if they are allowed to be archived on the global level. For more information see [Message Classes](#).

**i** **NOTE:** If you want to remove any of the message classes listed under the **Message classes** box from archiving, simply select them and then click on the **Remove** button.

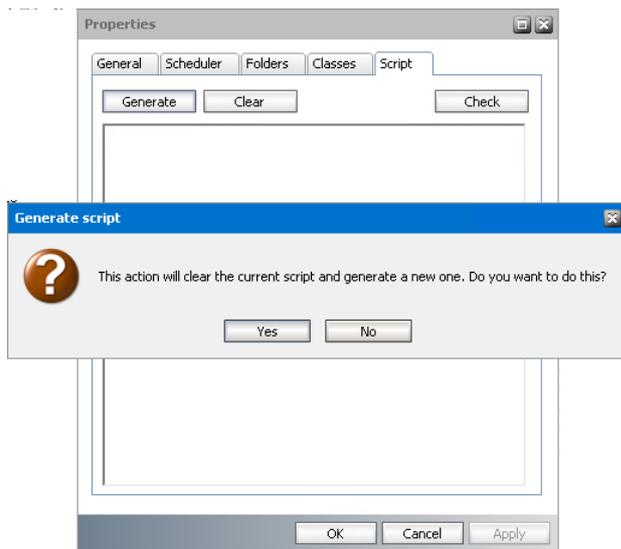
## Script tab

You might want to modify the script to define additional conditions you may have wanted to apply to a desired group. This can be done on the **Script** tab of the respective group.

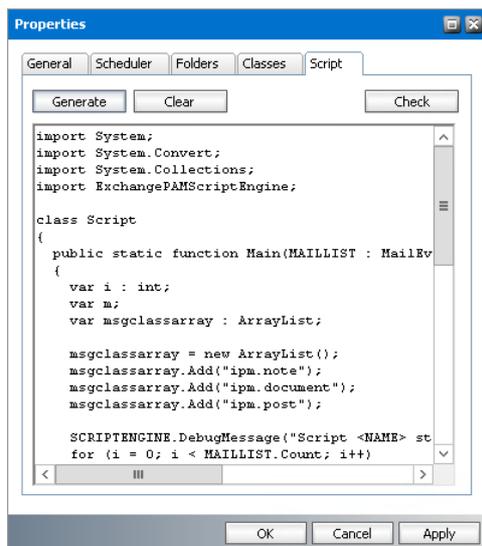
**i** **NOTE:** For instance, script is used when a particular feature of Archive Manager is deployed (e.g. live email indexing feature which allows fulltext search of live/non-archived emails in the ArchiveWeb interface).

### To generate a script for the desired group:

1. In **Manager** view click on the **Groups** tab.
2. Select the desired group in the left pane. **Right-click** it and in the context menu select **Properties**.
3. In the **Properties** window click on the **Script** tab.
4. Click on the **Generate** button. Then in the **Generate** script window click **Yes** to generate a new script.



5. Upon clicking **Yes**, the newly generated script will be displayed in the text box, as shown below. You may now modify it to your needs. By clicking on the **Check** button you will verify the syntax. When you are done, click **Apply** and then **OK** to confirm.



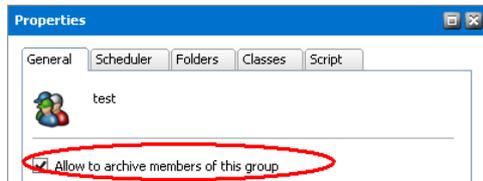
**i NOTE:** Please notice that by having modified the script, certain fields on the **General** and **Classes** tabs become inaccessible, meaning that they cannot be modified there. A generated script may be deleted, simply by clicking on the **Clear** button. Then the fields on the **General** and **Classes** tabs will become accessible again.

## How to activate the archiving option for a group

Keep in mind that automated archiving of emails via jobs is only possible for those groups that have had the archiving option activated. So, even if a job has been assigned to a group, but the group archiving option is not activated no automatic archiving will take place. Therefore, do not forget to activate it first.

## To activate the archiving option for a group:

1. In **Manager** view click on the **Groups** tab.
2. In the left pane double-click the desired group. Its **Properties** window opens.
3. In the **Properties** window on the **General** tab select the **Allow to archive members of this group** check box.



4. Click **Apply** and then **OK**. The group is now allowed to archive.

Now you are ready to assign a job that would do the archiving.

## How to deactivate a group from being able to archive

1. In **Manager** view click on the **Groups** tab.
2. In the left pane **double-click** the desired group. Its **Properties** window opens.
3. In the **Properties** window on the **General** tab make sure that the **Allow to archive** check box is de-selected.
4. Click **OK**. That group can no longer be archived.

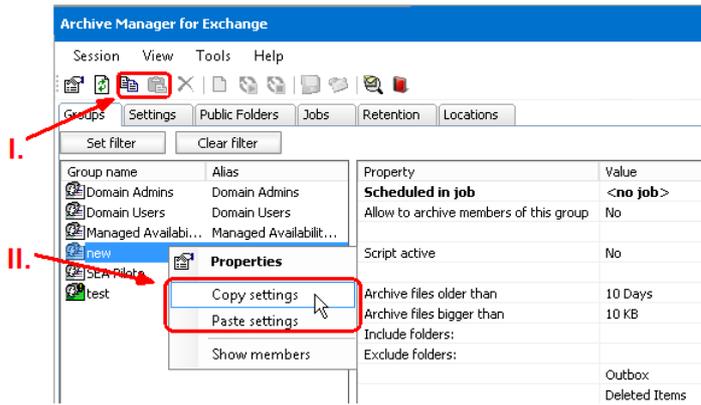
**i** | **NOTE:** Even if a job is assigned to it, no automated archiving of this group's items will take place.

## How to copy a group's settings

In the **Manager** view on the **Groups** tab there are two ways of copying a group's settings:

### Method I

1. To copy a group's settings, select the desired group in the list in the left pane and then click on the **Copy settings** (📄) icon on the toolbar.
2. Then select the target group and click on the activated **Paste settings** (📄) icon next to the **Copy settings** icon on the toolbar. Settings of the original group will be copied onto the target group.



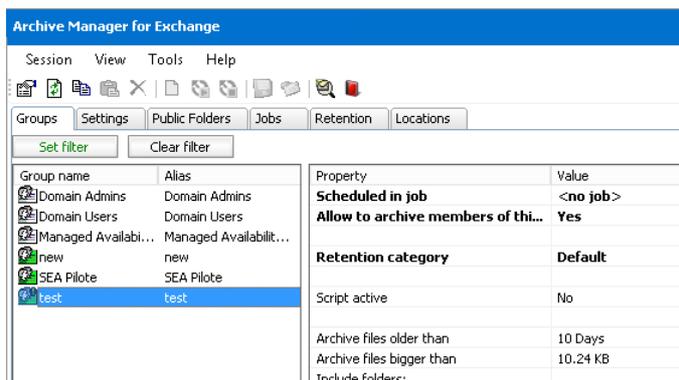
## Method II

1. To copy a group's settings, select the desired group in the left pane.
2. **Right-click** it and then, in the context menu, select **Copy settings**.
3. Then select the target group, **right-click** it and in the context menu select **Paste settings**. The settings of the original group will be copied onto the target group.

## How to schedule group archiving

The group which you want to be archived automatically has to be allowed to archive and a job must be assigned to it (see the section “How to archive emails of a group via a job”). Without activating it and having assigned a job to it, a group will not be allowed to archive automatically. It can, however, be archived manually (see the chapter [Archive view](#)).

**i NOTE:** Groups allowed to archive are displayed green. An icon of a group for which the archiving option has been activated, yet with no job assigned to it, is displayed green with an exclamation mark (!), to notify the administrator (see below).

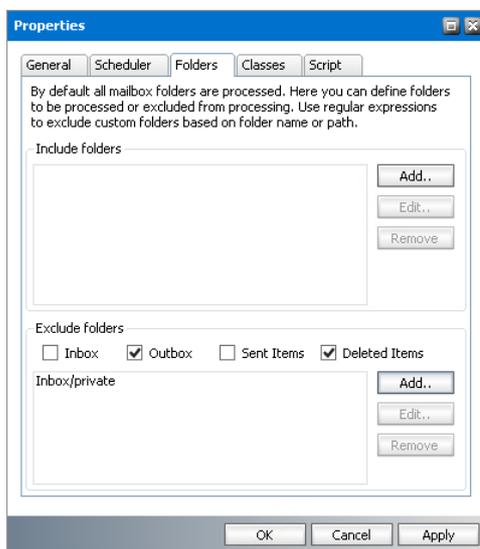


# How to configure specific folders for automated archiving

Let's say you have set the automated archiving for a group, yet you want to exclude/include some of the folders for automated archiving. To do so, follow these steps:

1. In **Manager** view click on the **Groups** tab.
2. In the left pane select the desired group and double-click it to open its **Properties** window.
3. In the **Properties** window, click on the **General** tab to make sure that the **Allow to archive** check box is selected. Then click on the **Scheduler** tab to verify whether a job was assigned. Then click on the **Folders** tab.
4. On this tab configure your desired settings in two sections:
  - **Include folders** – only the added folder will be archived. All its subfolders and other folders will be excluded from automated archiving. To include subfolders, use asterisk:
    - <folder>\* - Folder and all its subfolders will be archived
    - <folder>/\* - Only subfolders will be archived.
  - **Exclude folders** – added folder nor its subfolders will be archived
5. Finally click **OK**.

**i** | **NOTE:** As a path separator in both sections use a slash “/”.

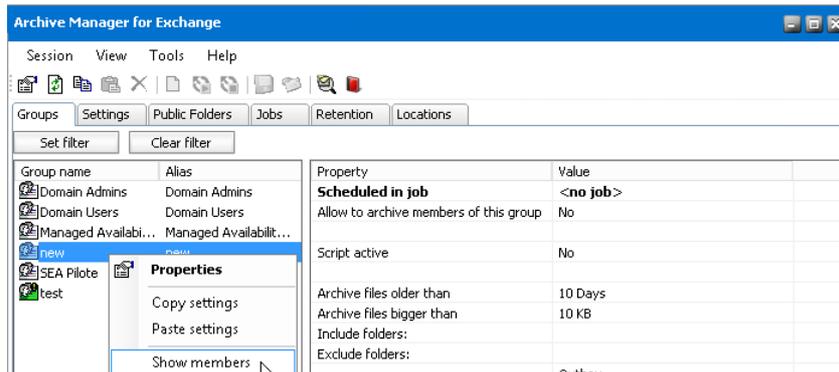


**EXAMPLE:** If you define for example the **Inbox** as an **exclude folder**, neither of its subfolders is processed. Provided that you want to exclude **Inbox** but archive its subfolders, add the **Inbox** as: **Inbox/\***. Click **Apply** and then **OK**. The respective folders will be excluded from automated archiving.

# How to display group members

## To check group members:

1. In **Manager** view, click on the **Groups** tab.
2. In the left pane, **right-click** a desired group and, in its context menu, click **Show members**.



3. A list of group members will be displayed.

## Settings tab

On the **Settings** tab in **Manager** view you may specify additional useful settings. We will describe what the upper and lower limit values are used for, etc.

- [Threshold settings](#)
- [Outlook Addin permissions](#)
- [Group level retention](#)
- [Shortcut templates](#)
- [Shortcut to user assignment](#)
- [Archive size report](#)
- [Notification settings](#)

## Threshold settings

On this tab it is possible to define mailboxes for which the Threshold job should run (see “Threshold job”). The threshold functionality allows the administrator to control the size of the mailboxes in the Microsoft Exchange Server and to prevent them from overflowing. (The limit

defined for a mailbox in MS Microsoft Exchange Server can be processed by Archive Manager as well).

The administrator can set the Lower and Upper limit. Upper and Lower values are percentages from the total mailbox limit allocated to a mailbox/group on the MS Microsoft Exchange Server. These two values are closely associated with Threshold job, which actually does the “cleaning up” of the Microsoft Exchange message store. When the Upper value is reached for a specific mailbox/group, then archiving via Threshold job can “free up” some space on the MS Microsoft Exchange Server until the Lower value is reached for the respective mailbox/group.

**Example:** The mailbox has a limit of 100 MB (defined in MS Microsoft Exchange Server). The administrator defines the threshold values 50/90. If the mailbox size reaches 90% of the limit (90 MB), the Threshold job will archive the mailbox until the size of the mailbox drops under 50% of the limit (50 MB). The threshold job archives the oldest messages first (default settings). The order of the messages can be modified using the scheduler service config key (“ThresholdSortBy”) in <installdir>\Metalogix\MAM4Microsoft Exchange\Services\PamExSchedulerSv\PamSchedulerSv.exe.config. The following values can be used:

- Order by last modification date (ascending, i.e. oldest first) [value = “0”]
- Order by received date (ascending) [value = “1”]
- Order by size (descending, i.e. biggest first) [value = “2”]

**i | NOTE:** After config file modification services must be restarted.

Further, it is possible to exclude specific messages from threshold processing. The Threshold job will archive the mailboxes but it will filter out specific messages based on your configuration. Available filtering for Threshold job:

- Filtering by message size
- Filtering by age
- Filtering by folder
- Filtering by message class

This filtering can be also configured using the scheduler service config keys in <installdir>\Metalogix\MAM4Microsoft Exchange\Services\PamExSchedulerSv\PamSchedulerSv.exe.config. For more information see the following table:

Filtering	Config key	Default value	Description
By message size	ThresholdMinimumSize	4	Minimum size (in KB) of the email which can be included in the threshold processing. All emails smaller than the

			defined size are not archived.
By age	ThresholdMinDate	0	If value > 0, messages which are younger than x days are excluded from processing.
By folder	ThresholdExcludeFolders	-	Semicolon separated list of exclude folders defined for threshold job; the syntax is the same as in case of group exclude folders.
By message class	ThresholdMessageClasses	-	Semicolon separated list of include message classes for the threshold job.

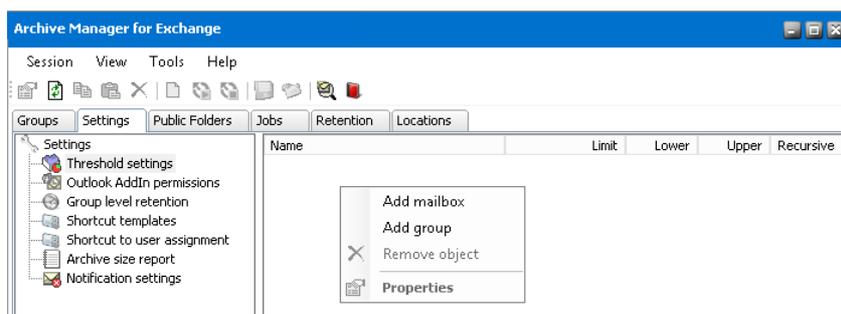
The mailbox limit in Microsoft Exchange Server can be defined on two levels: on the mailbox level and on the Information Store level. For Archive Manager the mailbox limit has a higher priority than the Information Store limit. These limits are read from Microsoft Exchange Server and can be checked in Address Book Manager (**Tools > Address Book Manager > click the Mailbox node > double-click the desired mailbox > in Properties window switch to the Others tab**).

## Adding a group/mailbox onto the Threshold tab

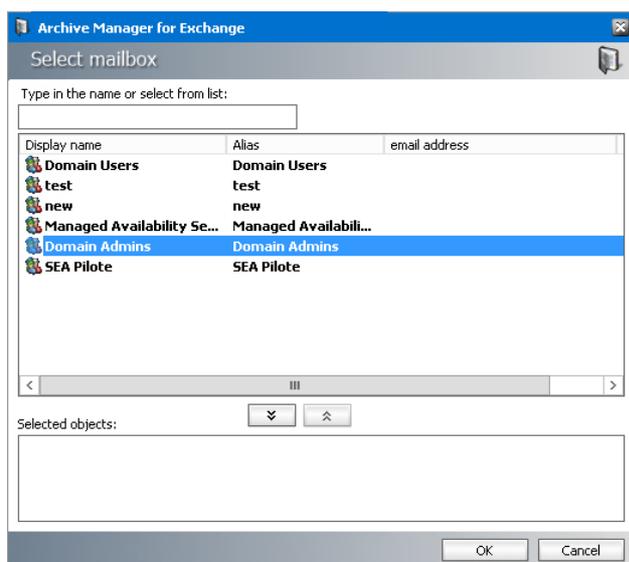
### To add a group/mailbox to the Threshold tab:

1. In **Manager** view, click on the **Settings** tab.
2. Click on the **Threshold settings** tab in the right pane.
3. Click with your right mouse button inside the right pane and then, in the context menu, click **Add group/Add mailbox**.

**i** | **NOTE:** Instead of clicking with your right mouse button inside the right pane and clicking **Add group** in the context menu you can also right-click the Threshold node in the left pane and then in the context menu click **Add group/Add mailbox**.



4. In the **Select mailbox or group** window enter the name of the desired group/mailbox in the text box or select the group/mailbox from the list. Then click **OK**.



5. The respective group/mailbox will now appear on the **Threshold** tab.

As a next step you need to set the **mailbox size limit** as well as **Upper** and **Lower** values to that group/mailbox.

## Setting the mailbox size limit, as well as Upper and Lower values

By setting size limitations for a group/mailbox you actually allocate space on the MS Microsoft Exchange message store for the desired group/mailbox.

Upon adding a group/mailbox onto the **Threshold settings** tab you should specify their maximal size limit, as well as Upper and Lower values. Whenever the **Threshold job** (see the section “Threshold job”) starts running it looks for mailboxes and groups having been specified on the **Threshold settings** tab, and starts archiving the content of those which have reached their **Upper** value, and keeps archiving until the **Lower** value has been reached.

### To set size limitations for a group/mailbox:

1. In **Manager** view, click on the **Settings** tab
2. Click on the **Threshold settings** tab.

3. Right-click the desired group/mailbox in the list and then, in the context menu, select **Properties**. The **Properties** window opens.
4. In the **Properties** window enter your specifications for **Manually defined limit**. This will be the maximal space that every mailbox of the group (or the given mailbox) will occupy in the MS Microsoft Exchange Server. Should you want to use a value different from the limit defined in Active Directory, check the **Always use the manually set limit** instead of the mailbox limit check box. If this check box is not checked, the **Active Directory limit** will be used instead of the here defined value.

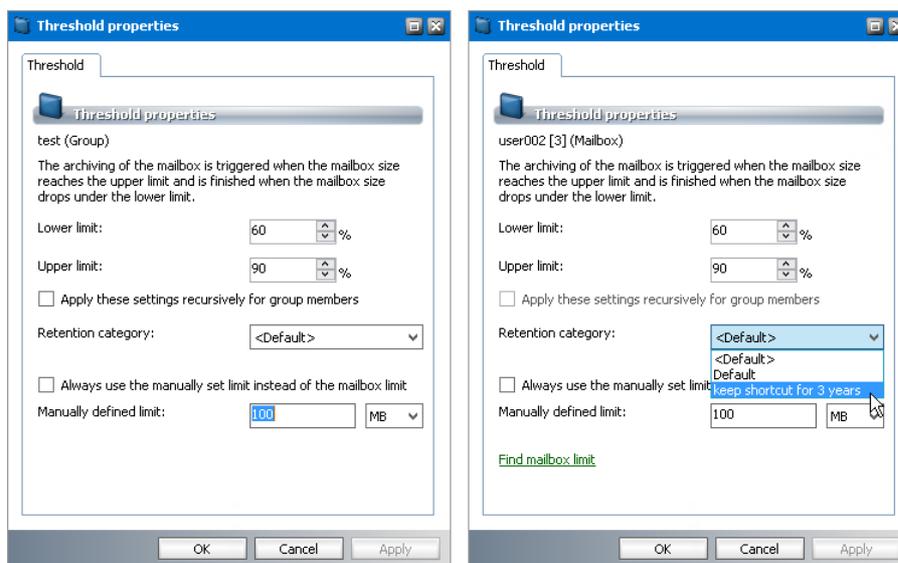
Enter your specifications for **Lower limit** and **Upper limit** as well.

**i** **NOTE:** Make use of the **Find mailbox limit** link to display the limit set in the Active Directory for the selected mailbox.

If you want those settings to be applied to any subgroup of a group, select the **Apply the settings recursively for group member** check box. In that case your settings will be applied to its subgroups.

In the **Retention category** down-drop box you can select the retention category to be used for archiving. Otherwise the retention category of the **Threshold job** (see the section “Threshold job”) will be used as default.

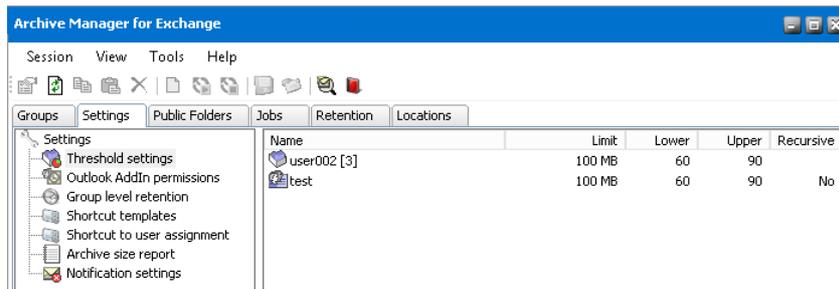
Click **Apply** and then **OK**.



Group Properties window

Mailbox Properties window

5. Upon clicking **OK** those settings will be displayed on the **Threshold** tab, as shown below.



## Outlook AddIn permissions

**Archive Manager Client AddIn** for MS Outlook has been designed for complete usage of Archive Manager for Exchange archiving solutions. Its extra features are directly incorporated in MS Outlook.

Global add-in settings are applied automatically onto every client machine with the **Archive Manager Client AddIn** installed. They apply also for OWA, if **Archive Manager OWA Extensions** are installed. It is therefore good to decide beforehand on some company strategy. In some cases you may want to modify the settings for some mailboxes/groups, and let them either gain additional rights, or withdraw some rights from them.

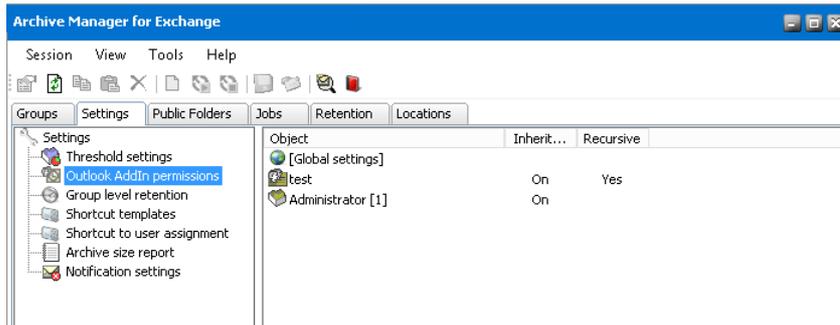
Permissions can be specified on the **Outlook AddIn permissions** tab in the **Archive Manager for Exchange**. At the same time, by adding users onto this tab you have an option to modify the permissions for them.

NOTE: Regarding the retention categories, individual groups or users can have their own default retention categories at Addin archiving. It may be set on the **Settings/Group level retention** tab (see the following section “Group level retention tab”). Otherwise the global default retention category is applied.

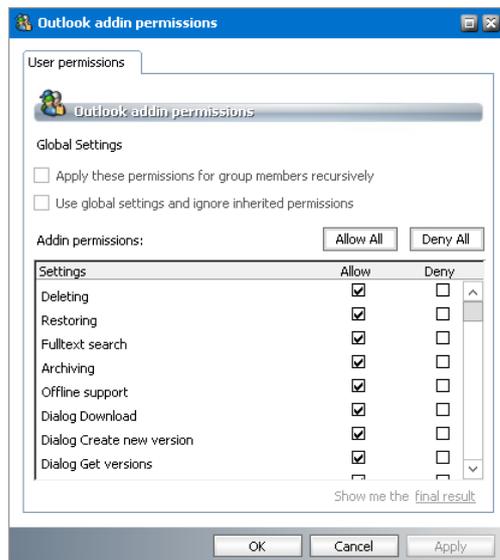
## How to set Outlook AddIn Permissions

### To define Outlook AddIn Permissions:

1. In **Manager** view, click on the **Settings** tab.
2. Click the **Outlook AddIn permissions** node in the left pane. Then double-click the [**Global settings**] icon.



3. The **Properties** window opens. For every option (Deleting, Restoring, Fulltext search, etc.) you may choose individually whether you want to activate or deny. When you are finished, click **Apply** and then **OK**.



4. Options selected in the previous step will be applied globally to all users with the **Archive Manager Client AddIn** installed.

Let us describe what the activating of individual options mean for the user who has the **Archive Manager Client AddIn** installed:

- Deleting
 

User will be able to mark items in the archive for deletion. This means that items marked for deletion will be DELETED from the archive upon the expiration of their retention period by using the Delete Files job, if specified (see the section “Delete Files job”).
- Restoring
 

User will be able to restore items from the archive himself.
- Fulltext search
 

User will be able to conduct full-text search within his archived items.
- Archiving
 

User will be able to archive items himself.

Offline support	User will be able to work offline with archived items.
Dialog Download	User will see a message box displayed when downloading.
Dialog Create new version	User will see a message box displayed when creating a new version.
Dialog Get versions	User will see a message box displayed when retrieving one of the archived versions.
Versions view	User will be able to view different versions of archived items.
Dialog Get fulltext results	User will see a message box displayed when getting full-text search results.
Dialog Identifying user	User will see a message box displayed when identifying the user at the beginning (when opening MS Outlook).
AddIn Options	User will be able to set some options, such as whether to auto-synchronize when Outlook starts/exits; what format to save archived messages in.
Create version	User will be able to create versions.
Select retention	User will be able to choose which retention category should be used at archiving

**i** **NOTE:** If all the global ones are activated, then users with the **Archive Manager Client AddIn** installed will have add-in features activated. Similarly, if all the global ones are deactivated, then users with the **Archive Manager Client AddIn** installed will have add-in features deactivated. You may however want to assign different rights to some users, i.e. to override the global ones. In that case add those users onto this tab and specify the desired rights for them individually. See the section [How to override global Outlook AddIn Permission settings](#).

**i** **IMPORTANT:** Be aware that after installation of **Archive Manager Client AddIn** no rights are allowed, yet no rights are denied. It is up to the administrator to choose the best approach regarding setting up the global rights.

Keep in mind that if for Global Settings you:

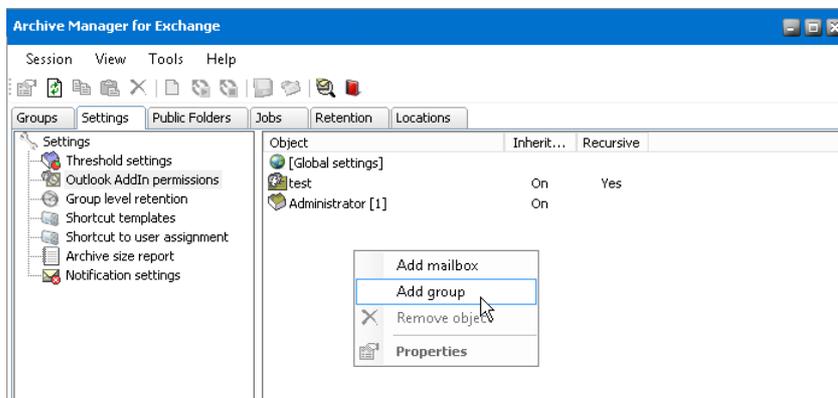
1. allow all of the options, then all users with the **Archive Manager Client AddIn** or **Archive Manager OWA Extension** installed will be allowed to do archiving, restoring, etc.
2. deactivate all of the options, then all users with the **Archive Manager Client AddIn** or **Archive Manager OWA Extension** installed will not be allowed to do archiving, restoring, etc.

In both cases you will have to add all those users for whom you want to change the settings onto this **Outlook AddIn permissions** tab and specify the desired options for them.

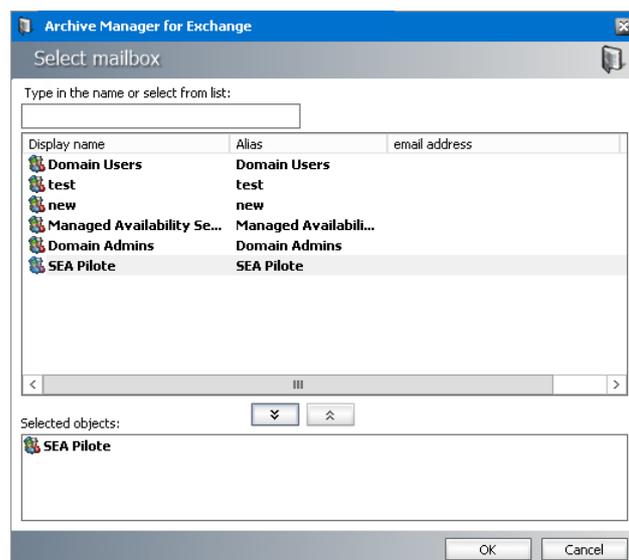
## How to override global Outlook AddIn Permission settings

### To override global AddIn settings and assign different AddIn rights to a group/mailbox:

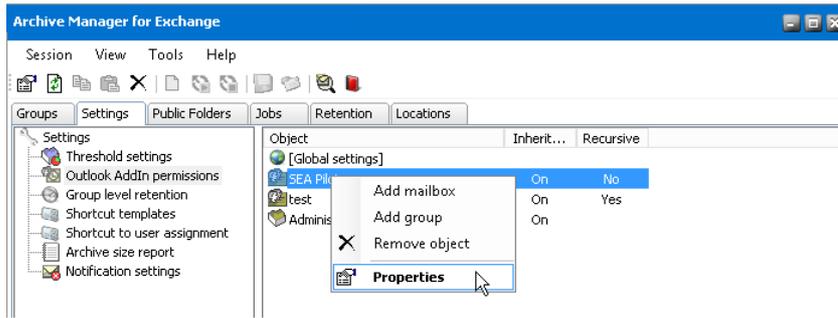
1. In **Manager** view, click on the **Settings** tab.
2. Click on the **Outlook AddIn** permissions tab in the right pane.
3. Click with your right mouse button inside the right pane and, in the context menu, select **Add group/Add mailbox**.



4. In the **Select group or mailbox** window enter the name of desired group/mailbox in the text box or select the desired one in the list below. Then click **OK**.



5. The respective group/mailbox will be added onto the **Outlook AddIn permissions** tab. Right-click it and, in the context menu, click **Properties** to open its **Properties** window.



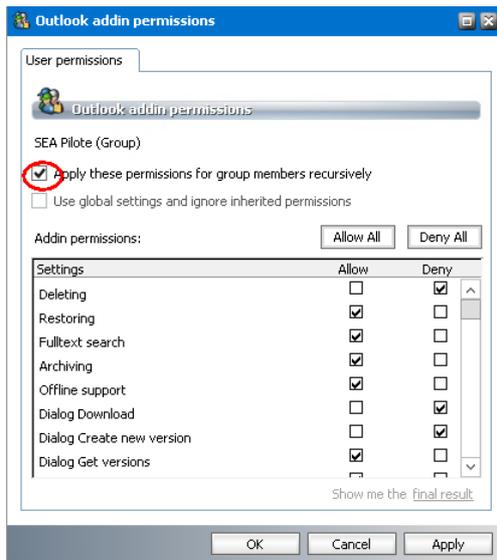
6. In its **Properties** window you may either allow or deny individual options simply by clicking on appropriate **Allow** or **Deny** check boxes.

These attributes will override the global ones.

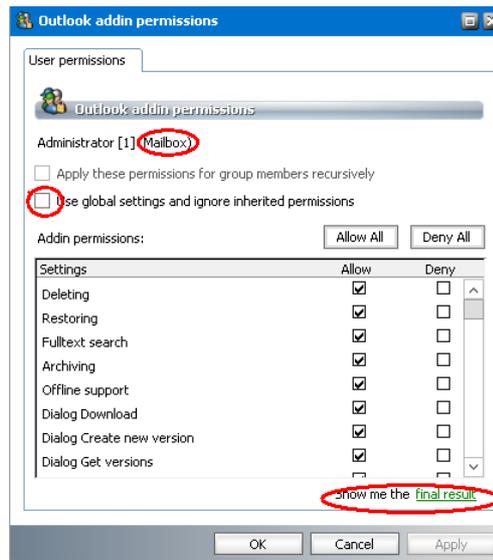
**For group:** You may wish to apply those settings for subgroups as well. In that case select the **Apply these permissions for group members recursively** check-box.

When you have finished, click **Apply** and then **OK**.

**For mailbox:** If you select the **Use global settings and ignore inherited permissions** check box, the global rights will be inherited again and the ones specified in the **Properties** window, will be overridden. In those cases you may check the effective Addin rights by clicking on the **final result** link.

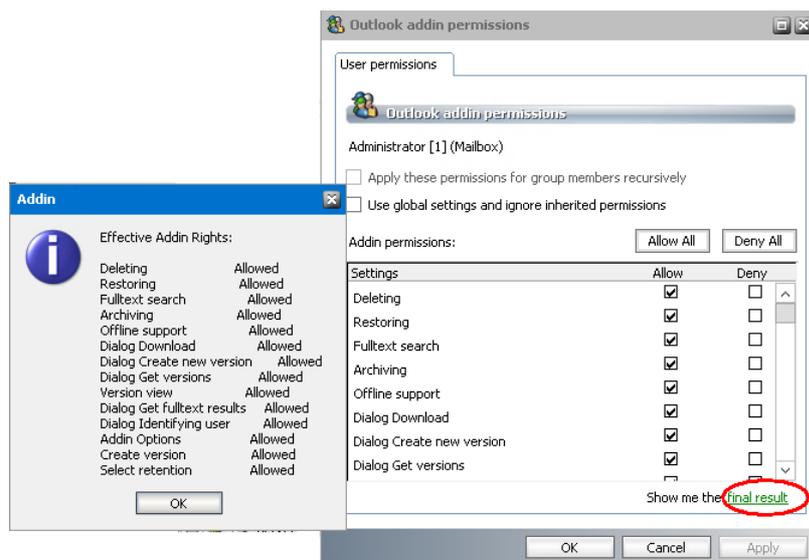


Group properties window



Mailbox properties window

If we assume in our example that all rights in the global settings are allowed, then after clicking on the final result link you would get the following:



## Group level retention

As a part of AMAC preferences, the default retention category was specified on the **Tools /Options/Archive settings/Retention** tab. For more information see [Archive settings](#). The default retention category is used if no specific retention category is chosen at archiving. It usually applies for manual archiving using Archive Manager Client Addin.

However, this tab gives you the opportunity to set different default retention categories for different groups or users. It is especially useful in case of Archive Manager Client Addin. Company needs or user preferences can be taken into account. For each group/user you can specify the default retention category used when archiving in Outlook via Addin.

**i** | **NOTE:** Addin rights for individual users or groups can be set on the **Settings/Outlook Addin permissions** tab (see the section “Outlook Addin permissions” in the “Settings tab” chapter).

## How to specify global default retention category

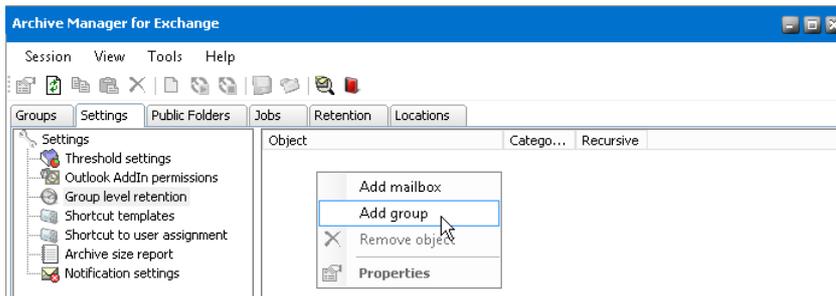
Global default retention category can be set on the **Tools /Options/Archive settings/Retention** tab.

## How to set default retention category for individual groups or mailboxes

To override global default retention category and assign specific default retention category to individual group/mailbox:

1. In **Manager** view, click on the **Settings** tab.
2. Click on the **Group level Retention** tab in the right pane.

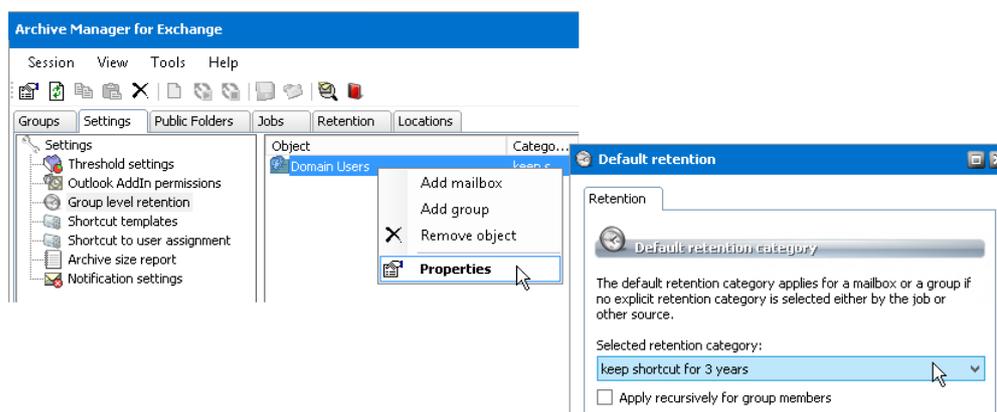
3. Click with your right mouse button inside the right pane and in the context menu select **Add group/Add mailbox**.



4. In the **Select mailbox or group** window enter the name of the desired group/mailbox in the text box or select the desired one in the list below. The click **OK**.
5. The respective group/mailbox will be added onto the Retention tab. Right-click it and, in the context menu, click **Properties**.

6. In its **Default retention** window select the desired retention category in the down-drop box.  
**For group:** You may want to assign that retention category to subgroups as well. In that case select the **Apply recursively for group members** check box.

Click **Apply**, then **OK**.



**i** | **NOTE:** The default retention category assigned to the mailbox has higher priority than the default retention category assigned to the group.

## Shortcut templates

When an email is archived, usually (depending on settings) just a shortcut is left behind in the Microsoft Exchange server. Administrator can configure shortcuts according to the company needs and define how the shortcuts should be displayed in the user's Outlook preview.

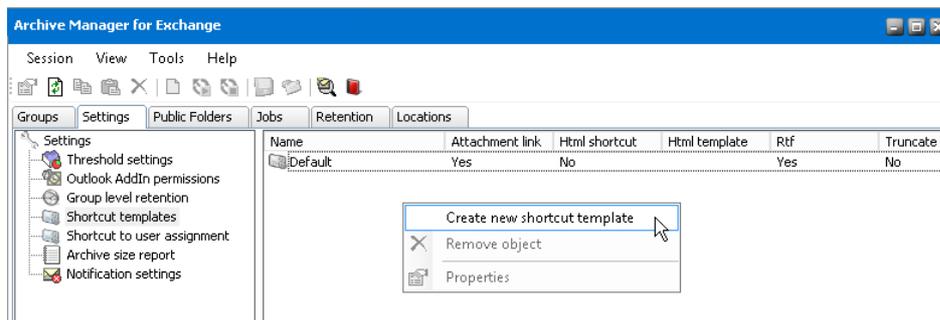
Shortcut layout and type is specified through shortcut templates. There can be various shortcut templates defined for different users/groups. For instance, Mac users may need specific shortcuts.

This node is reserved for shortcut template creation. Different types of templates can be created. It is possible to configure maximal shortcut size, the format of the message body and create attachment links reachable from the preview pane of Outlook/OWA.

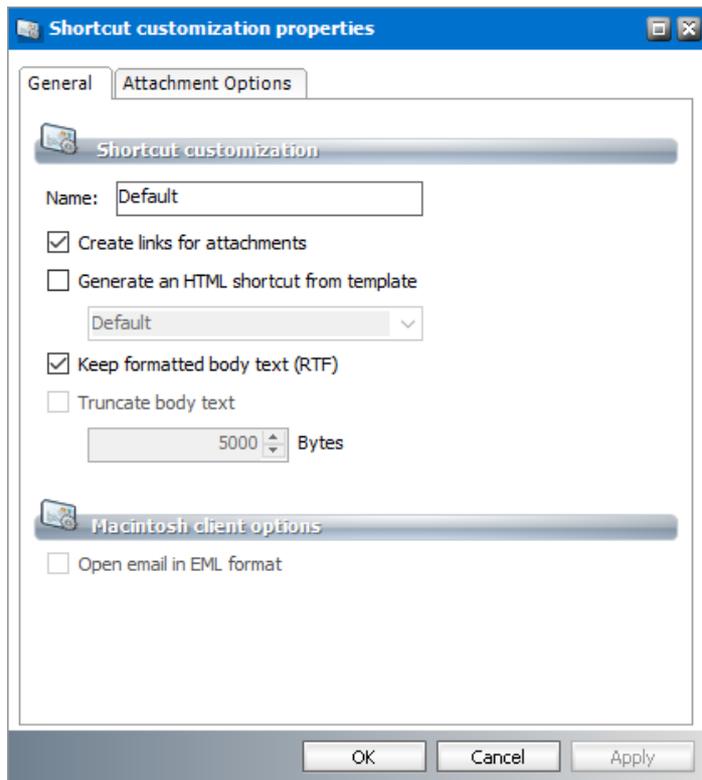
Shortcut templates created on this tab can then be assigned to groups or users on the **Shortcut to user assignment** node, e.i. the user/group's archived emails will have the defined configuration.

**i** **NOTE:** One of the shortcut templates can be selected as a global template in the **Shortcut** tab from **Tools/Options/Archive Settings**. This template will then be used in cases when no other template settings are applied. As default it is the Default template.

To create a new shortcut template select the **Shortcut templates** node. Then right-click inside the main pane and from the context menu select **Create new shortcut template**.



Before specifying settings for shortcuts it is important to think over how the shortcut (archived email) should look like. Consider your priorities and intentions as well as expectations of the users. For instance, if it is vital to keep the shortcuts small, you will want to truncate the body text and not to keep formatted body text. On the other hand, you may want users to be able to read the emails in the preview pane (no body-text truncating) and also to access attachments from the preview pane (e.g. Create links for attachments option) etc. - read further about possible options.



As default (i.e. when no settings are specified on this tab) the Archive Manager archiving processes replace the email on MS Microsoft Exchange with the shortcut that includes the header and the body of the archived email. Therefore, the Outlook Preview is able to display the archived items while the Attachments field is left empty. The attachment is included in the message when the email is retrieved from the archive by double-click.

You can set the format of the shortcut as well. Check the **Generate an HTML shortcut from template** check box to create shortcuts in HTML format. The HTML shortcut includes also links for attachments, so there is no need to activate **Generate an HTML shortcut from template** and **Create links for attachments** at the same time.

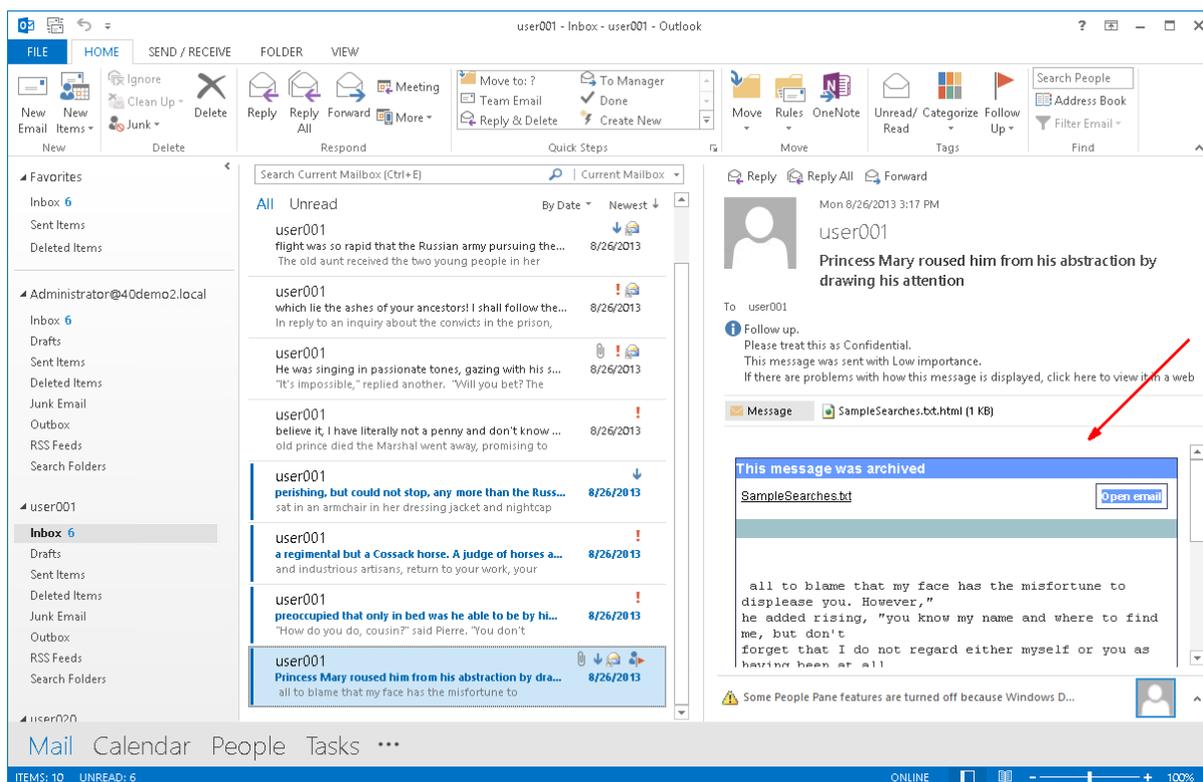
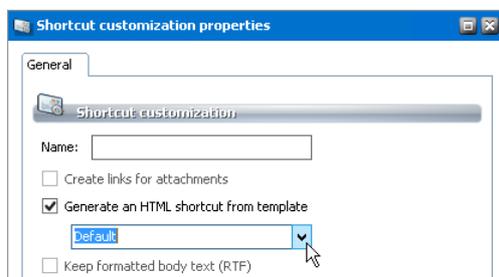


Fig. Default HTML shortcut in the Outlook preview pane

Choose your desired HTML shortcut template from the down-drop box under the **Generate an HTML shortcut from template**. If you have not created any template yet, there is just the *Default* one. You can create your own templates to customize the HTML shortcuts design. For more information see [How to create a customized HTML shortcut template](#) .



When the message is archived, its header and body are kept in the MS Microsoft Exchange Server as default, no matter what size they are. Only attachments are removed. Should you wish to allocate just fixed size for every archived email and in this way save even more space on your MS Microsoft Exchange, check the **Truncate body** text check box. In the **Bytes** text field enter the MAXIMAL size of the shortcut left on the MS Microsoft Exchange Server. The message body will be truncated, if it is bigger than the specified size.

**i** **NOTE:** Remember that in the Preview pane of Outlook user can see only the shortcut left on the MS Microsoft Exchange Server and the Outlook Find feature can search also only in this shortcut.

If you check the **Keep formatted body text (RTF)** check box, the formatted text of shortcut will not be altered.

If the **Keep formatted body text (RTF)** is not checked, only the plain text message body will be kept.

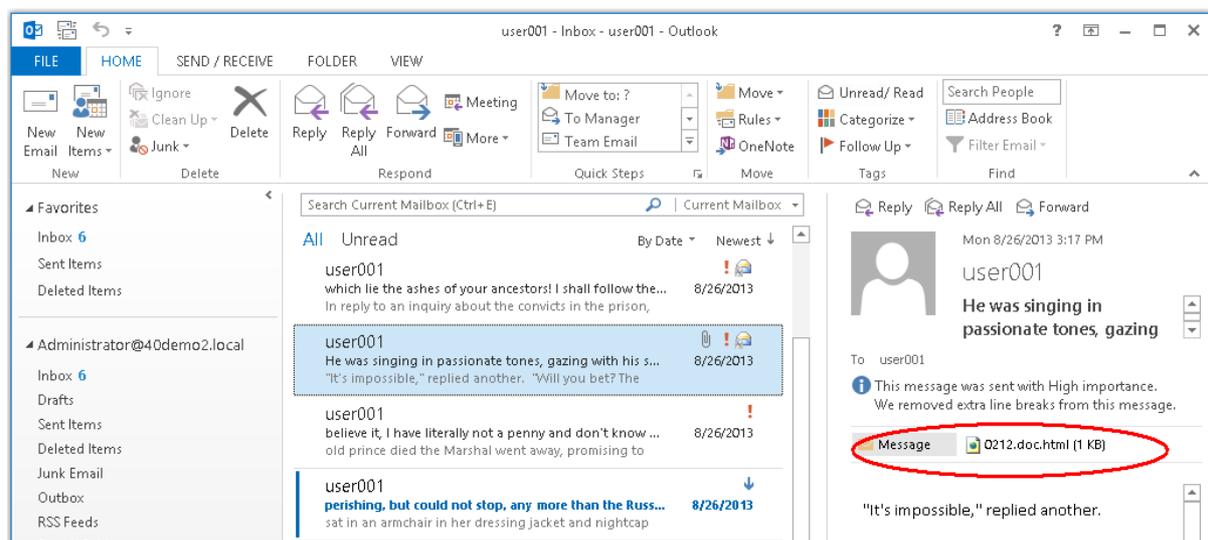
**i** **NOTE:** The **Keep formatted body text (RTF)** and the **Truncate body text** options are mutually exclusive. So are **Keep formatted body text (RTF)** and **Generate an HTML shortcut from template**.

After changing settings on this tab, you may want to apply them not only to new shortcuts which will be created from now on, but also to shortcuts which were created previously. To do so, you have to run the Repair shortcut command on a group, mailbox or folder where these new settings should apply to previously created shortcuts (see the section “Repairing shortcuts”).

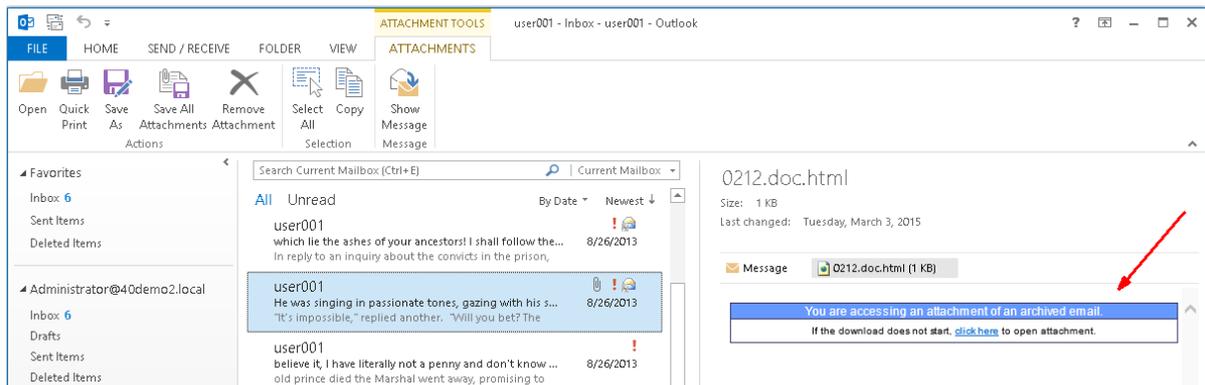
The settings under **Entourage** options apply for Entourage users as well as other email clients (e.g. mobile clients). Check the **Open email in EML format** so that users will be able to open archived emails from the preview pane.

## Attachments

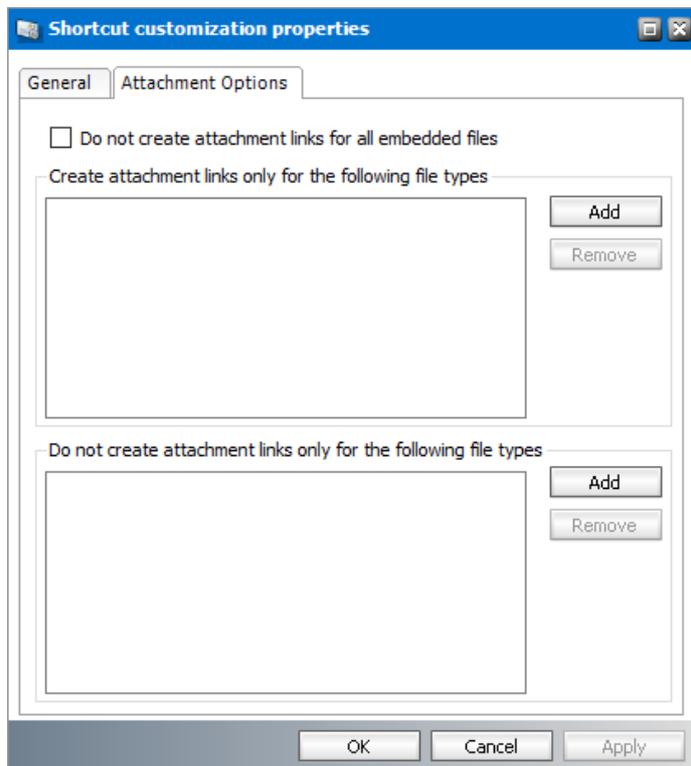
To make the attachment accessible from the Preview pane, check either the **Create links for attachments** or **Generate an HTML shortcut from template** check box and configure links creating on the **Attachment Options** tab as described further. The HTML link available in the Outlook/OWA Preview will be created. It will bear the name of the attachment with an .html extension as shown below.



When clicked, the following info panel may be displayed. Click the link to download the attachment from the Archive Manager server.



If you plan to use attachment links in shortcuts you need to configure the settings on the next tab (**Attachment Options** tab).



The settings are as follows:

- **Do not create attachment links for all embedded files** - Links will not be created on the shortcut for embedded files.
- **Create attachment links only for the following file types**: Click the **Add** button to add any file types to display its link on the shortcut.
- **Do not create attachment links only for the following file types**: Click the **Add** button to exclude file types from being displayed as links on the shortcut

**i** **NOTES:** The **Create links for attachments** option must be selected in the **General** tab. You can use only one of the two options: **Create attachment links only for the following file types** or **Do not create attachment links only for the following file types**. If you use either one, the other option will be deactivated.

# Shortcut to user assignment

When an email is archived, usually (depending on settings) just a shortcut is left behind in the Microsoft Exchange server. Administrator can configure shortcuts according to the company needs and define how the shortcuts should be displayed in the user's Outlook preview.

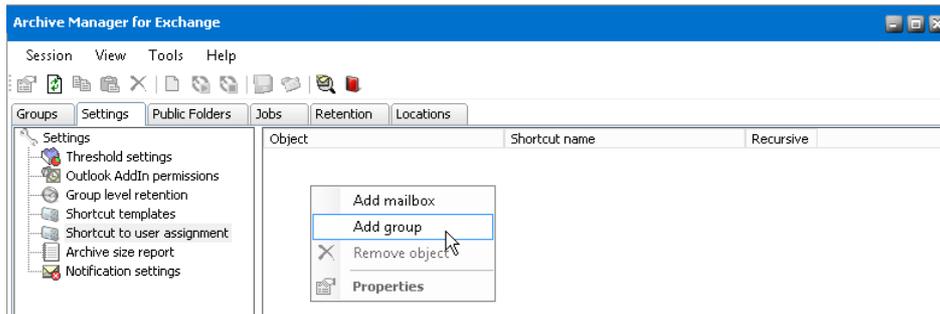
Shortcut layout and type is specified through shortcut templates. These templates are created under **Shortcut templates** node (see the previous section).

Different users/groups can have different shortcut templates assigned on this tab.

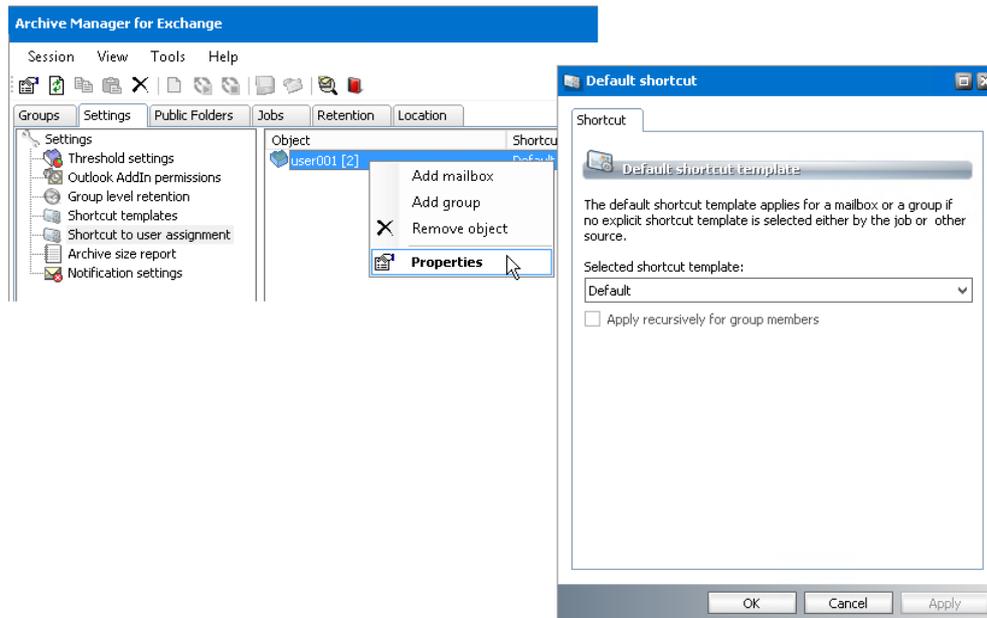
**i** **NOTE:** Default shortcut template can be specified also on the **Tools/Options/Archive settings/Shortcut** tab. If the default shortcut template is changed here it is changed also on that tab and vice versa.

## To assign a group/user specific shortcut template:

1. Right-click inside the main pain. From the context menu select **Add group/Add mailbox**.



2. In the pop-up dialog select the desired group/user in the listview and click **OK**.
3. The group/user will be displayed in the listview with default settings specified. To adjust the settings right-click the group/user and from the context menu select **Properties**.



4. In the pop-up window select the desired template from the dropdown box. If applicable you can check the **Apply recursively for group members** check box to apply it also for possible subgroups. Then click **Apply**.

## Archive size report

From time to time, administrators may need to know the status of users' mailboxes, just to get an overview of the entire size of mailboxes in the HSM store. For that purpose they may easily create reports containing all relevant data.

When clicking on the **Archive size report** tab for the first time there will be no mailboxes displayed.

To display all mailboxes, click on the **Calculate** button (  ). The list of mailboxes will be displayed in the right pane, including message size, archived size, archived size uncompressed, shortcut size, and the limit of mailboxes as well. Mailboxes can be sorted simply by clicking on the respective column headers (**Object**, **Message size**, **Archive size**, **Archive size uncompressed**, **Shortcut size**, and **Limit**).

**i** | **NOTE:** The size of delayed shortcuts is not calculated in the **Shortcut size** column.

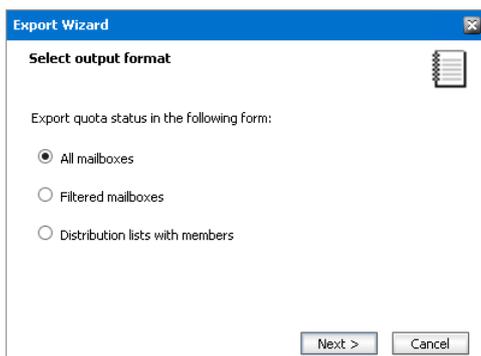
Object	Message size	Archive size
Administrator [1]	1.52 MB	553.78 KB
Jerry McLean [22]	0 B	0 B
Lou Florence [24]	0 B	0 B
Marianne Peters [23]	0 B	0 B
public_40ADDC2 [-100]	0 B	0 B
user001 [2]	382.8 KB	309.07 KB
user002 [3]	6.23 MB	497.82 KB
user003 [4]	0 B	0 B

To get an overview, create a report by clicking on the **Export** button (  ). The **Export Wizard** window will open with three options to choose from: **All mailboxes**, **Filtered mailboxes**, or **Distribution lists with members**, depending on whether you want to create a report including all the mailboxes, only filtered mailboxes, or distribution lists with members only. Detailed explanation is given in subsequent section.

## How to create a report for all mailboxes, filtered mailboxes and distribution list

To get an overview of the HSM store, create a report by following these steps:

1. In **Manager** view, click on the **Settings** tab, and then on the **Report** tab.
2. Click on the **Export** button to create a report. On the first page of the **Export Wizard**, select:
  - a) **All mailboxes** option and then click **Next**.
  - b) **Filtered mailboxes** option and then click **Next**.
  - c) **Distribution lists with members** option and then click **Next**.



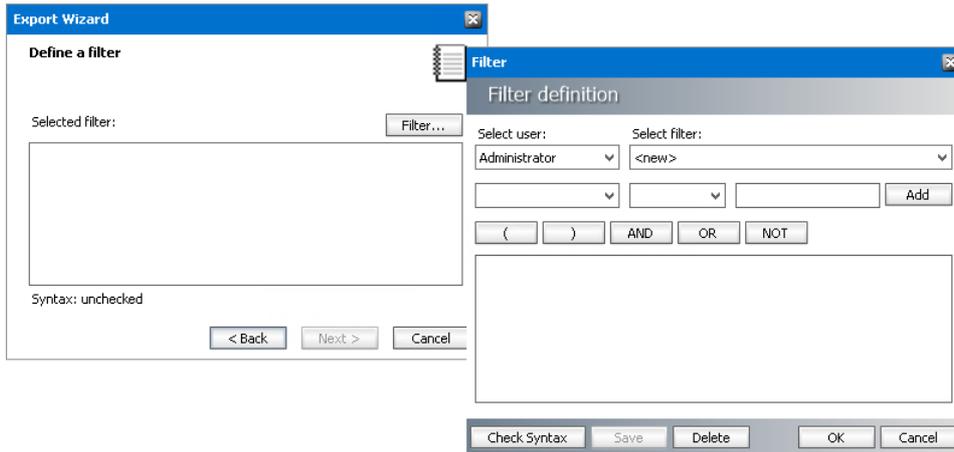
- i. If you have selected **All mailboxes** option, go to step 3.
- ii. If you have selected **Filtered mailboxes** option, then:

In the **Define a filter** window that opens simply click on the **Filter** button to either create a filter or select an already created one listed in the **Selected filter** list-box.

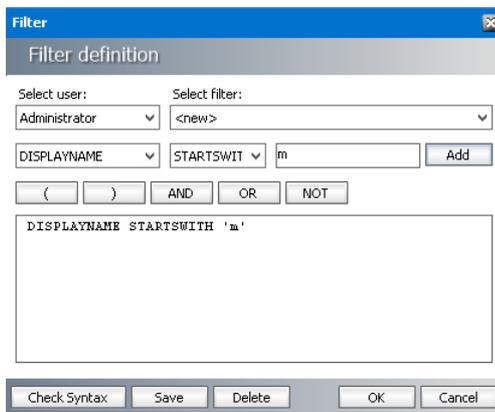
In the **Filter** window that pops up:

  - either select an already existing filter in the **Select filter** dropdown box and then click **OK**;
  - or create your own by choosing RDN/ALIAS/DISPLAYNAME/EMAILADDRESS in the first dropdown menu, =/STARTSWITH/ENDSWITH/CONTAINS in the second dropdown menu, and entering text in the text box next to the **Add** button.

Then click on the **Add** button. If you want to combine some other conditions, simply use brackets and logical operators and confirm by clicking **Add**.



The resulting filter will be displayed in the text box below. To check the syntax, simply click on **Check Syntax**. Click **Save** to give this newly created filter a name, and confirm by clicking **OK**.



The resulting filter will be displayed in the **Selected filter** list box. Click **Next** and proceed to step 3.

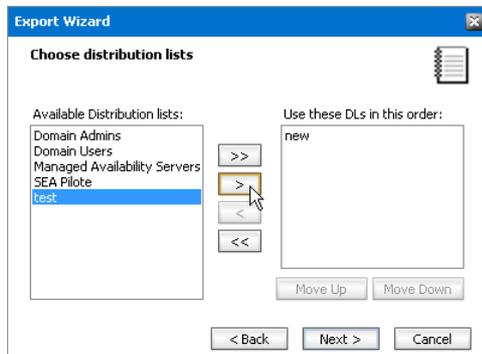


iii. If you have selected **Distribution lists** with members option, then:

On the next page of the **Export Wizard** you may select the desired groups for your report. Simply select appropriate items in the **Available Distribution lists** list box and click the **left-to-right arrow** button. The respective items will subsequently be moved to the **Use these DLs in this order** list box.

- To include all groups, click on the **left-to-right double-arrow** button.

- To remove some of the groups and have them not included, select the respective item in the **Use these DLs in this order** list box and then click on the **right-to-left arrow** button.
- With the **Move up** and **Move down** buttons simply organize your report to your needs. Groups will be displayed in the report (Excel sheet) exactly in the order as specified in the **Use these DLs in this order** list box.

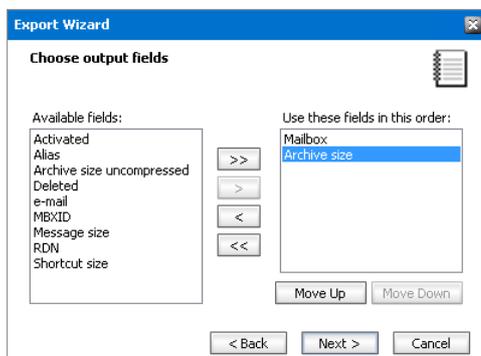


When you are satisfied with the list of groups listed in the **Use these DLs in this order** list box, proceed by clicking **Next**.

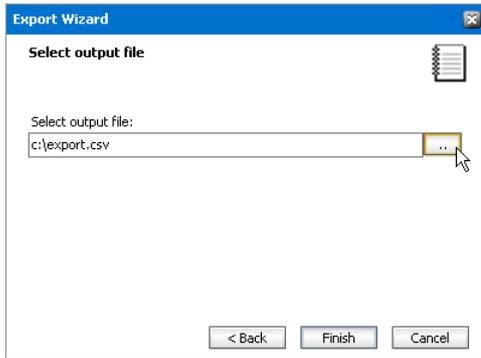
3. On the **Choose output fields** page in the **Export Wizard** you can select fields for your report. Simply select the desired item in the **Available fields** list box and click the **left-to-right arrow** button. The item will subsequently be moved to the **Use these fields in this order** list box.

- If you want to include all the fields in the report, click on the **left-to-right double-arrow** button.
- If you want to remove some of the fields and have them not included in the report, then select the respective item in the **Use these fields in this order** list box and then click on the **right-to-left** arrow button.
- With the **Move up** and **Move down** buttons simply organize your report to your needs. They will be displayed in the report (Excel sheet) exactly in the order as specified in the **Use these fields in this order** list box.

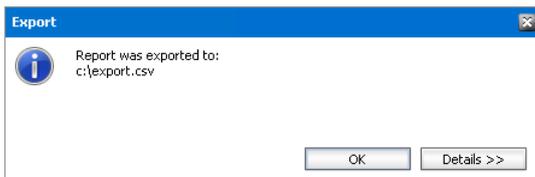
When you are satisfied with the selection of fields and their order, proceed by clicking **Next**.



4. On the next page you may specify the name of the exported file and the place it should be saved to. Just enter the path and appropriate name in the **Select output file** text box; or click on the **Browse** button to select the appropriate folder.



5. Then click **Finish** to see the full path displayed, including file-name.



6. By clicking on the **Details** button, the details will be displayed. Click **OK**.

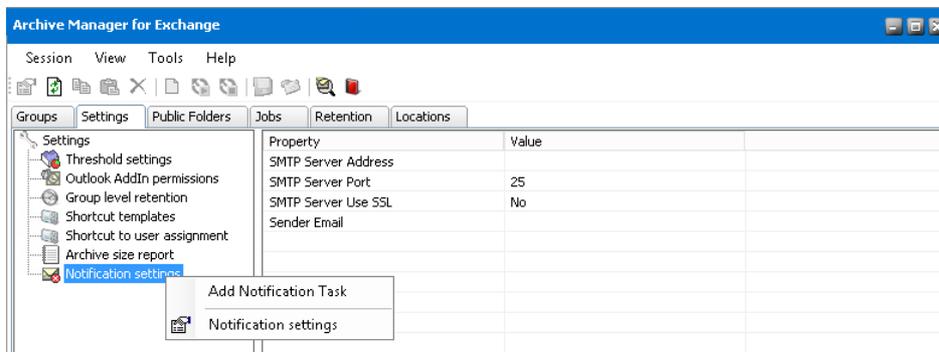
7. Having created the report, open it directly from the place you saved it to. (In our example from C:\export.csv)

**i** **NOTE:** If the data in the report (Excel sheet) is contained in only one column, check if a proper delimiter has been set on the **Others** tab (see the “Others tab”).

## Notification settings

This feature has been designed to notify the users, preferably administrators, about circumstances leading in some cases to critical situations. Depending on the type of confidence level, alert messages (notification) will be sent to recipients added onto the **Notification settings** tab.

You may specify which user will be sending notifications. Simply right-click the **Notification settings** node in the left pane and in the context menu click **Notification settings**.



In the **Notification Settings** window specify the **SMTP server** (**Port** and use of **SSL** as appropriate) and the **Sender**. (User and password are optional.) When you are done, click **Apply** and then **OK**.

The sender you have specified will be sending alert notifications. These settings will be displayed in the right pane.



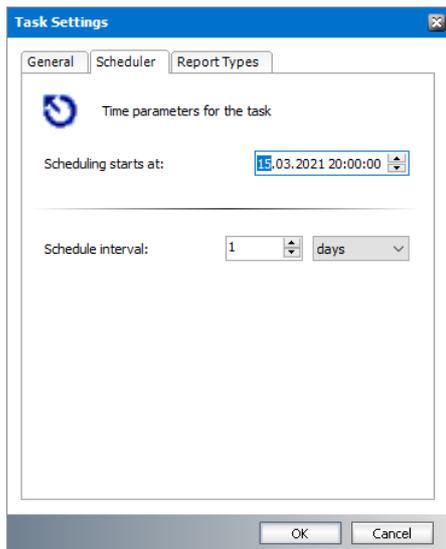
Once the sender is defined, follow the steps below to configure several notification tasks:

1. Right-click the **Notification settings** node and select **Add Notification Task**.
2. In the **Task Settings** window define the **Task name** and **Recipients** e-mail. Several recipients should be separated by semicolon (;).

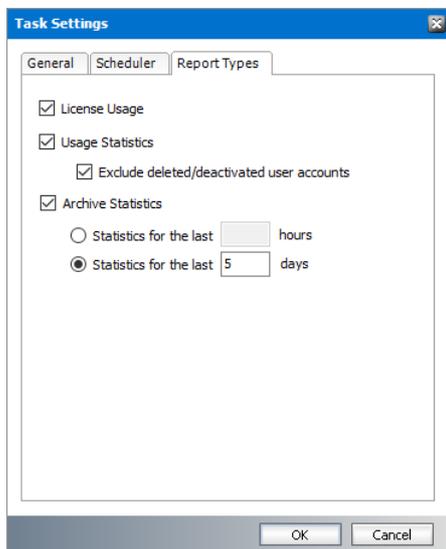
It is possible to **Send test mail** by clicking the link.



3. Then click the **Scheduler** tab where sending notification can be scheduled.



4. On the **Reports Types** tab specify the desired reports:



**a) License Usage**

The Report contains the licensed mailboxes, mailboxes in use and the maintenance information. If the customer is over the license limit or the maintenance is expired, this information will be displayed in red font in the email.

**b) Usage Statistics**

If you activate the check box **Exclude deleted/deactivated user accounts** then deactivated user accounts will be excluded from the report.

**c) Archive Statistics**

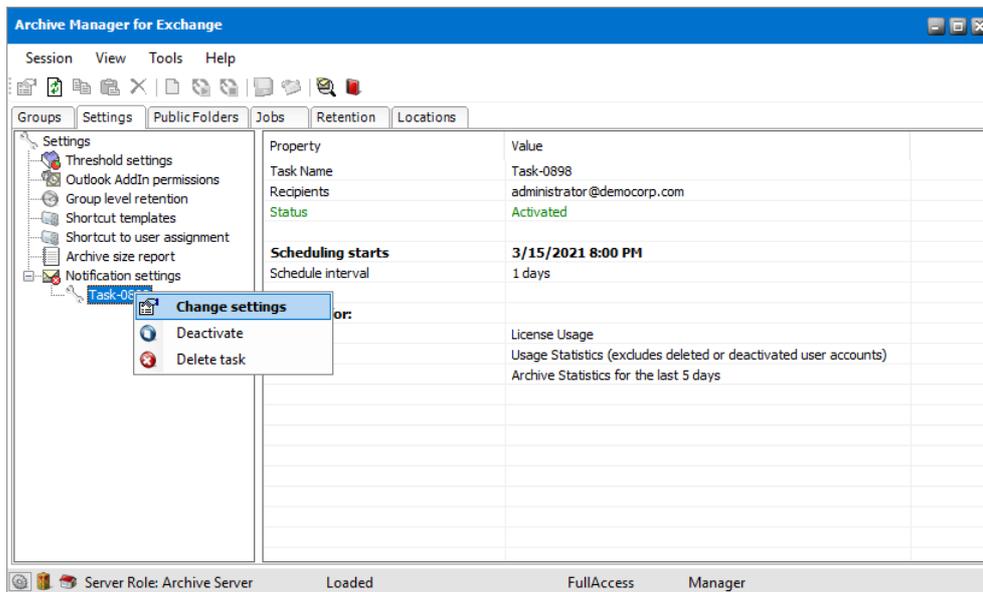
**For example:**

- a. The scheduler is set up to 8 PM, and the interval is one day. You intend to have a statistic for the last 24 hours. So you will generate the statistic for the last 24 hours beginning at 8 PM
- b. The scheduler is setup up to 8 PM, and the interval is 4 hours. You intend to have a statistic for the last 4 hours. So you will generate the statistic for the last 4 hours

(statistic between 4 PM until 8 PM). The next job run is at 12 PM. So you will generate the statistic for the last 4 hours (statistic between 8 PM until 12 PM)

- c. The scheduler is setup for 6 PM, and the interval is one week. You intend to have a statistic for the last 7 days. So you will generate the statistic for the last 7 days by hours. The next job run is at 6 PM one week later.

- 5. Individual tasks can be **Deactivated**, **Deleted** or **Changed** by right-clicking the task name under the **Notification settings** node.



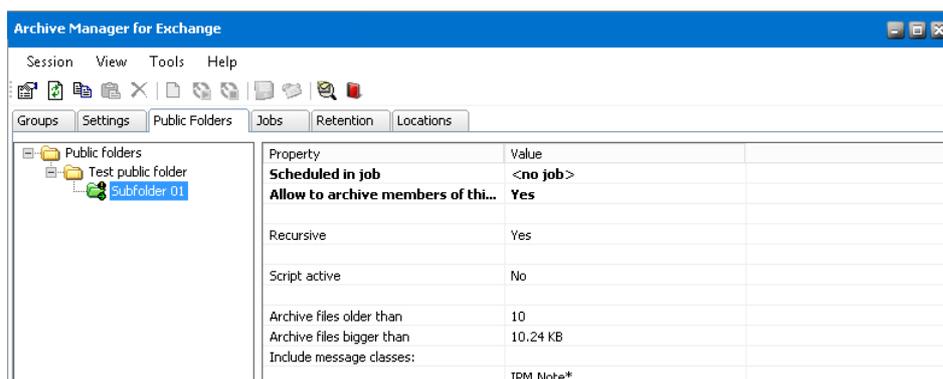
## Public folders tab

On the **Public folders** tab you can set your general criteria for automated public folder archiving. Public folders are archived in the same way as groups are archived.

**NOTE:** It is also possible to archive public folders manually one by one – for more information see the section “Public folders tab (Archive view)”.

To display public folders, click on the **Public folders** tab in **Manager** view. Then unfold the tree structure in the left pane.

You are able to see here just those public folders for which the user specified on the **Tools/Options/Server settings/Public Folders** tab as a “Public Folders owner” has the owner rights. To see all public folders you have to set the super-user (in our case srv\_Microsoft Exchange) as a “Public Folders owner” on a **Tools/Options/Server settings/Public Folders** tab.



**NOTE:** The icons of public folders having been activated for archiving are displayed in green.

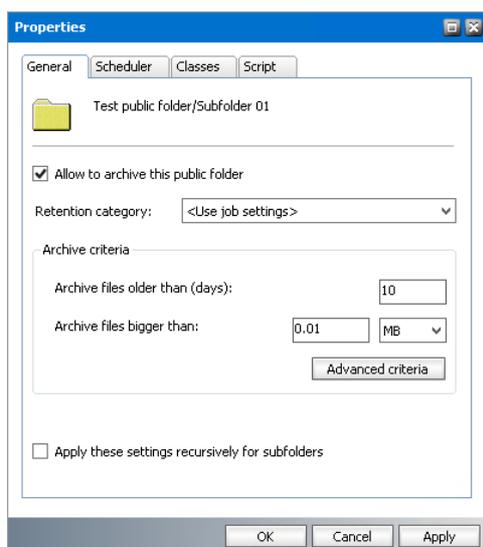
## How to set criteria for archiving a public folder

When you have decided to archive the content of a public folder, you need to specify the criteria according to which emails of that folder will be archived. You may do that through the properties of the folder in question.

There are two ways of setting the criteria for archiving a desired public folder:

- You may either right-click the desired folder and select **Properties** in the context menu to open the **Properties** window; or
- You may select the desired folder and then click on the **Properties** icon on the toolbar following which the **Properties** window for that specific folder opens.

### Steps to set your criteria in the Properties window



1. In the **Properties** window, click on the **General** tab.

On this tab you may activate the archiving option for public folders. Only with this option activated the public folder can be archived via jobs. You can also specify the period after which messages will be archived and a limit-value for the files. Recursiveness is available as well.

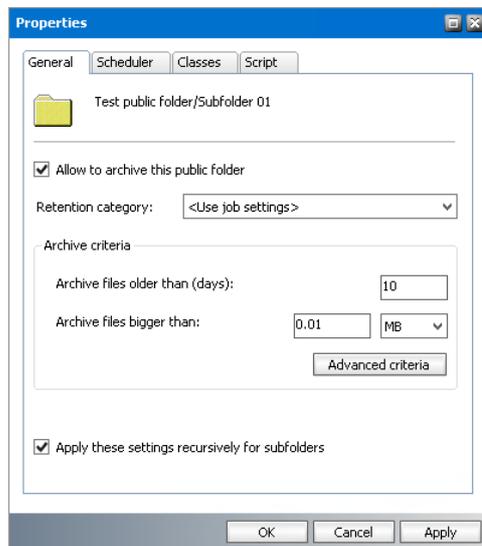
Select the **Allow to archive members of this group** check box, to activate archiving. In the **Retention category** down-drop box you can select a retention category which will be used for archiving the public folder. It allows you to archive the public folder with specific retention category. This retention category can be DIFFERENT from the one assigned to a job that will be in charge of the public folder. (The relevant job is specified on the scheduler tab.) Should you select the Use job settings option, the retention category of the job will be used.

In the **Archive files older than (days)** text box you may enter a number, specifying after how many days you want messages to be archived.

In the **Archive files bigger than** text box you may enter a number, specifying the minimum size of the messages to be archived; please do not forget to select the proper item from the dropdown list to specify size either in B, KB, or MB.

If you want the subfolders to be archived as well, select the **Apply these settings recursively** check box.

**EXAMPLE:** On the figure below we want to archive all messages older than 10 days and exceeding 100KB (also applied to subfolders). Further, the retention category of the job will be used and all settings will be applied recursively to subgroups.



When you click **Apply**, the respective public folders are now activated for archiving. In the next step you need to specify a job that would be used for automated archiving. You will do that on the Scheduler tab.

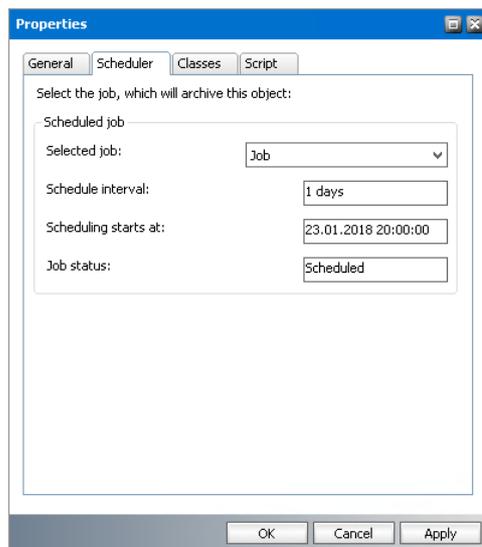
**i** | **NOTE:** Public folders which have no job assigned to them but with activated archiving (**Allow to archive** option) have green icon with an exclamation mark.

2. Switch to the **Scheduler** tab.

Automated archiving is done via jobs that must be specified beforehand on the Archive Manager for Exchange/Jobs tab. So if no jobs have been defined yet, do so first (See “How to create a job”). Once jobs have been defined on the Jobs tab, you may select the relevant one.

To do so, open the **Selected job** drop-down list and select a job, for instance 9 pm-archiving. As soon as you select a job, the **Schedule interval (in days)**, **Scheduling starts at**, as well as **Job status** text boxes are automatically filled in with that job’s settings.

**EXAMPLE:** On the following figure we have selected a job called 9 pm-archiving. With the 9 pm-archiving job messages will be archived daily at 20:00 as of June 6th, 2009. The status of that job is *Scheduled*, which means that the job has not been put on hold and will run at the specified time.

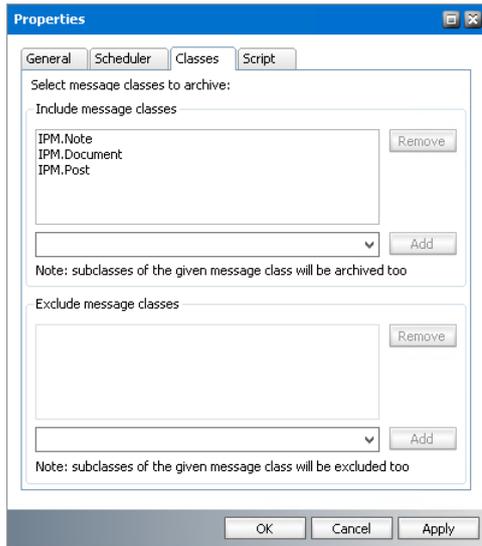


Click **Apply**.

3. In the **Properties** window click on the **Classes** tab.

Here you can specify the types of email items contained in the respective public folder to be archived/excluded from archiving by default. **Message classes** archived by default are listed in the Message classes list box. They include IPM.Note (email), IPM.Post (Note in Outlook), IPM.Document (OLE-documents). You may of course remove any of them from that box and thus exclude them from archiving by default. Similarly, you may add additional classes and have them archived by default.

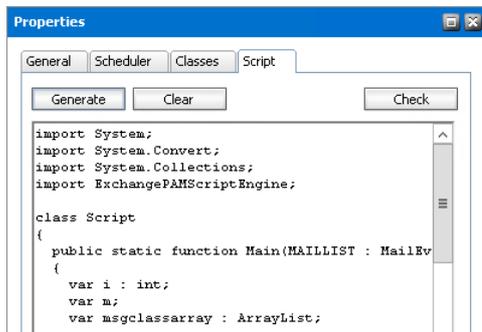
Click on the down arrow next to the **Add** button to open the drop-down menu. Select the desired item and then click **Add**.



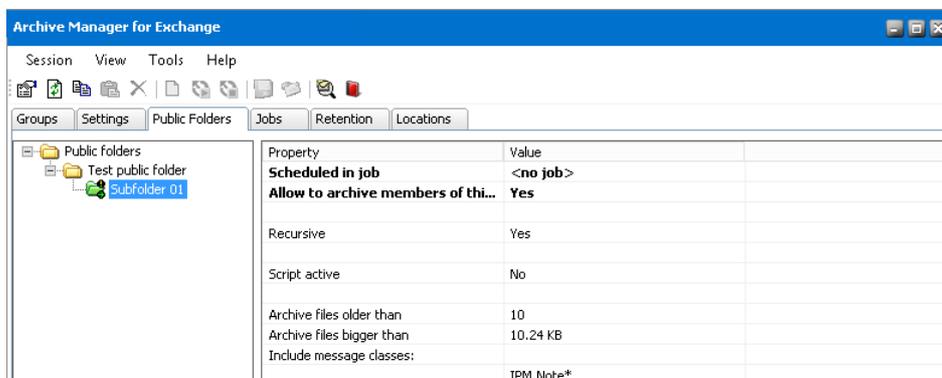
The respective item will be added to the list in the Message classes list-box. To confirm, click **Apply**.

4. In the **Properties** window click on the **Script** tab. You may want to modify the script for a public folder, simply to define further conditions.

To display the first script, click **Generate**. It will be subsequently displayed in the text box below. Now you may modify it to your needs. When you are done, click **Apply** and then **OK** to confirm.



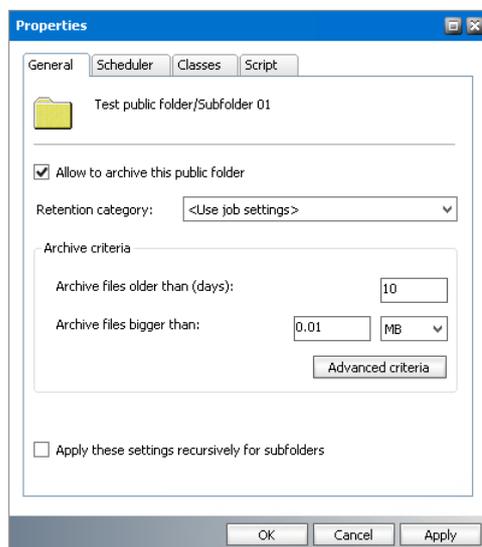
**i** **NOTE:** A public folder having been set for archiving is displayed green (see below). Folders, where recursiveness is applied, are depicted with an arrow on their icon.



# How to activate the archiving option for a public folder

## To activate the archiving option for a public folder:

1. In **Manager** view click on the **Public folders** tab.
2. In the left pane select the desired public folder, right-click it and then, in the context menu, click **Properties** to open its **Properties** window.
3. In the **Properties** window on the **General** tab do not forget to select the **Allow to archive** check box.
4. Click **Apply** and then **OK** to confirm. The archiving option is now activated for the folder. Now you are ready to assign a job that would do the archiving.



# How to deactivate the archiving option for a public folder

## Steps to deactivate the archiving option for a public folder:

1. In **Manager** view click on the **Public folders** tab.
2. In the left pane select the desired public folder, right-click it and then, in the context menu, click **Properties** to open its **Properties** window.
3. In the **Properties** window on the **General** tab do not forget to deselect the **Allow to archive** check box.
4. Click **Apply** and then **OK** to confirm. It is no longer possible to archive this public folder via job.

# How to copy a public folder's settings

In Manager view, click on the Public folders tab.

To copy a public folder's settings, choose one of the following options:

## Method I

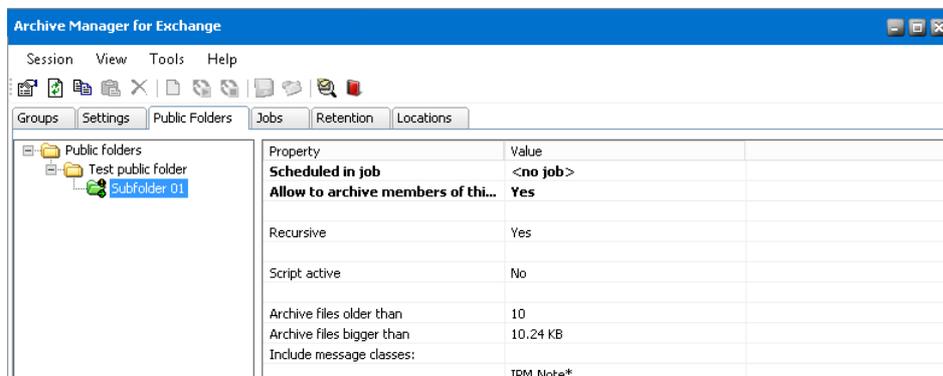
1. To copy the settings of a public folder, select a desired folder in the left pane and then click on the **Copy settings** icon on the toolbar.
2. Then select the target public folder to copy those settings onto and click the **Paste settings** icon on the toolbar. Those settings will be copied onto the target folder.

## Method II

1. To copy the settings of a public folder, select a desired public folder in the left pane, right-click it and then, in the context menu, click **Copy settings**.
2. Then select the target public folder to copy those settings onto. Right-click it and, in the context menu, select **Paste settings**. Those settings will be copied onto the target folder.

# How to schedule archiving for a public folder

First you need to check if the desired public folder has had the archiving option activated (see the section [How to activate the archiving option for a public folder](#)). Folders activated for archiving are displayed in green. You can now schedule archiving by assigning a job (see the sections "Scheduler tab" and [How to create a job](#)).



# Jobs tab

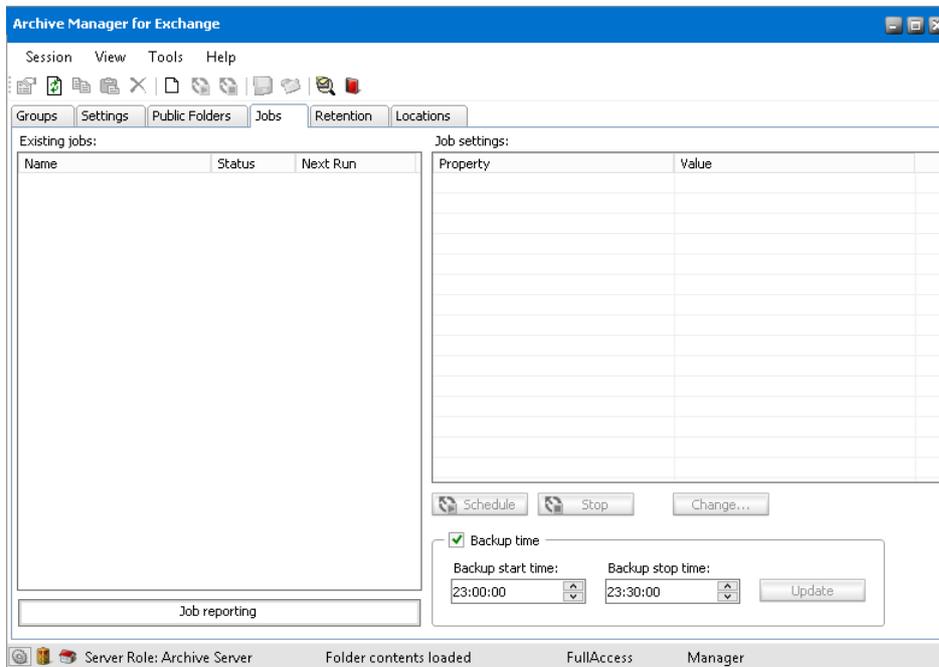
On this tab you can define jobs for automated archiving. Archiving with jobs is done in the background – with predefined settings.

**i** **IMPORTANT:** On the **Jobs** tab, at the bottom of the right pane, you have to specify the backup time, in other words, the period during which jobs are not supposed to run in order to activate database backup. It is not possible to archive until it is set. Just enter the time in the **Backup start time** and **Backup stop time** fields and then click **Update**.

You may for instance schedule your database backup overnight.

**i** **NOTE:** Do not schedule your jobs during the backup interval, as they are paused until the backup period is over and no mails would be archived during that period. After that the job is resumed.

At first there may not be jobs defined, as seen below. You need to create them.



## How to create a job

As mentioned previously, automated archiving is done via jobs which need to be specified up front.

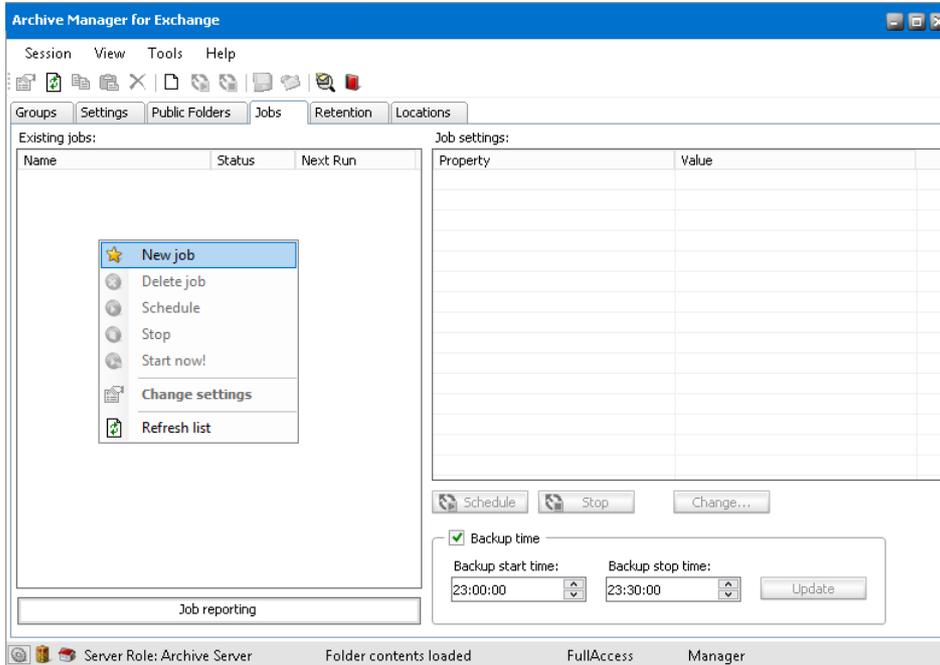
### To define a new job:

1. In **Manager** view click on the **Jobs** tab.

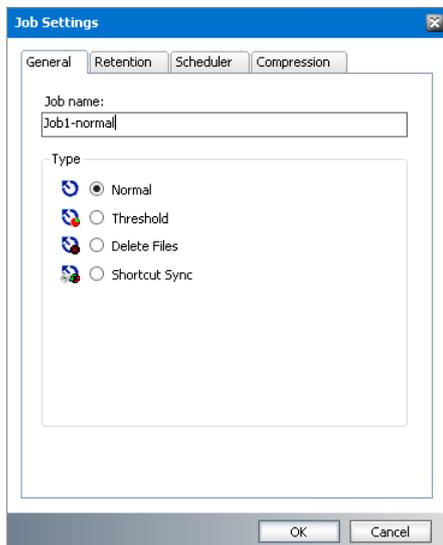
**i** | **NOTE:** When creating new job, click the **Refresh** button to update the **Jobs** tab.

2. Right-click in the left pane and in the context menu select **New job**.

**i** | **NOTE:** You can also click on the **Create new job** icon on the toolbar to define a job.



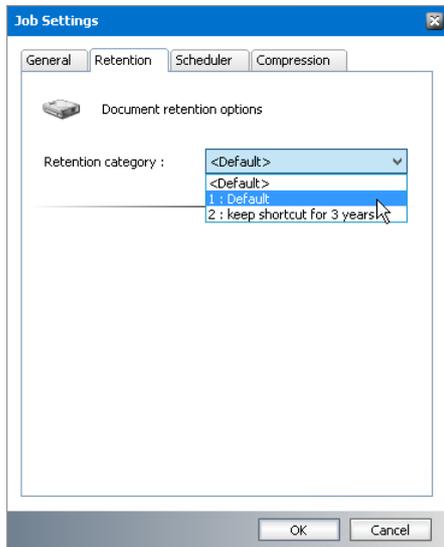
3. In the **Job Settings** window that is displayed please specify your settings for the **General**, **Retention**, **Scheduler**, and **Compression** tabs.



On the **General** tab enter a name for your job in the **Job name** text box. Then choose the type of job (Normal, Threshold, Delete Files or Shortcut Sync). Later we will describe what these options mean (see the following sections: “Normal job”, “Threshold job”, “Delete Files job” and “Shortcut Sync job”)

4. Click on the **Retention** tab. On this tab you need to specify the retention category which defines the retention time for the items archived via this job. By the means of these

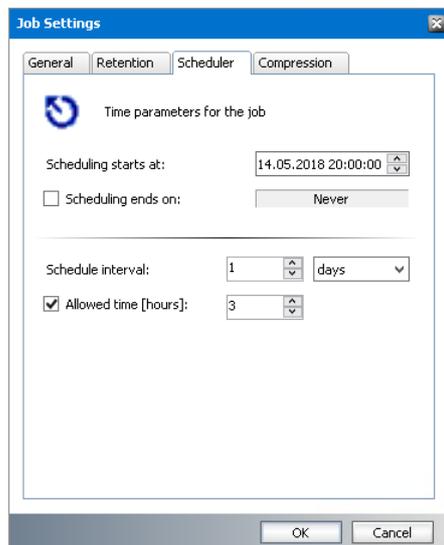
categories you can adjust shortcut behavior and set various retention times for archived items. You can choose from available categories or you can create your own categories on the **Retention tab** of **Manager** view. (Usage of retention categories, their features and management are described in detail in the “Retention tab” section.)



5. Click on the **Scheduler** tab. On this tab you should specify the time when scheduling begins: in the **Scheduling starts at** field enter the date (by clicking on the upward or downward arrows, or by overwriting it) and time (directly by overwriting the time).

In the **Schedule interval** box you may specify a period following which the job restarts itself. Just click on the upward and downward arrows. The period may be set in minutes or days.

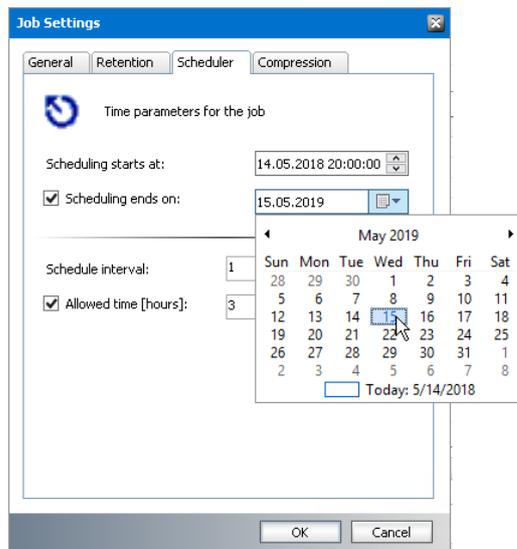
Should you select the **Allowed time [hours]** box, then you may enter your archiving period simply by clicking on the upward or downward arrows.



If you select the **Scheduling ends on** check box you may specify a time when the scheduling ends. The period is set to **Never** by default, i.e. when the check box is not selected.

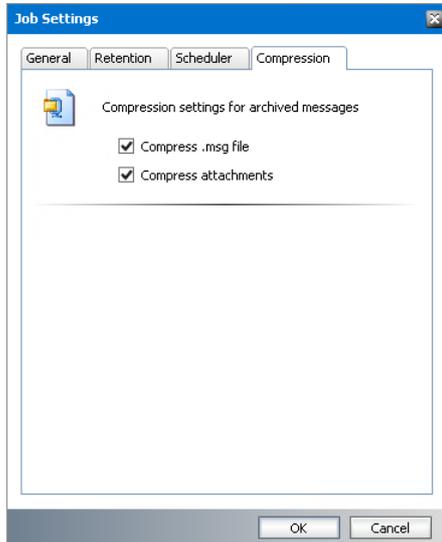
Scheduling is by default set to never. However, should you want to stop the job at a certain point in the future, select the **Scheduling ends on** check box. Then click on the downward

arrow to open the calendar where you can select the appropriate month (by clicking on the left and right arrows) and time (by selecting the appropriate day).



6. Click on the **Compression** tab. On this tab you may specify which of the files will be compressed, simply by selecting the appropriate check boxes: **Compress .msg file**, and **Compress attachments**.

Compression-related settings having been defined under **Tools/Options/Archive settings** relate to manual archiving only; they are not automatically used by jobs. Therefore, compression-related settings need to be specified individually for each job.



There have been 4 jobs pre-defined by default: Threshold, Shortcut Sync and Delete Files. The fifth one – Normal job – is for general use.

These 4 pre-defined jobs are unique and there can always be only one such job defined (i.e. only one Threshold job etc.), as they are used for special purposes.

Let's now describe these jobs.

# Threshold job

Companies usually define within their IT department rules regarding storage space mailboxes or groups may occupy on the MS Microsoft Exchange server, to avoid mail server overloading. The Threshold job is used specifically for that purpose.

By defining the maximal size of a mailbox on the **Threshold** tab (see the section “Threshold tab”) you may actually specify space having been reserved for it on the MS Microsoft Exchange server. Other specifications (Upper and Lower values) are defined there as well.

When the Threshold job starts running, all mailboxes listed on the **Threshold** tab whose size has reached their respective Upper value will be archived until their respective Lower value has been reached (for each mailbox there can be assigned different threshold values). This way you can easily arrange enough space on your MS Microsoft Exchange server, so that CPU efficiency is preserved at a desirable level.

**Example:** The mailbox has a limit of 100 MB (defined in MS Microsoft Exchange Server). The administrator defines the threshold values 50/90. If the mailbox size reaches 90% of the limit (90 MB), the Threshold job will archive the mailbox until the size of the mailbox drops under 50% of the limit (50 MB). The threshold job archives the oldest messages first (default settings). The order of the messages can be modified using the scheduler service config keys (ThresholdSortBy) in `<installdir>\Metalogix\MAM4Microsoft Exchange\Services\PamExSchedulerSv\PamSchedulerSv.exe.config`. The following values can be used:

- Order by last modification date (ascending, i.e. oldest first) [0]
- Order by received date (ascending) [1]
- Order by size (descending, i.e. biggest first) [2]

**i** | **NOTE:** After config file modification the services must be restarted.

Further, it is possible to exclude specific messages from threshold processing. The Threshold job will archive the mailboxes but it will filter out specific messages based on your configuration. Available filtering for Threshold job:

- Filtering by message size
- Filtering by age
- Filtering by folder
- Filtering by message class

This filtering can be also configured using the scheduler service config keys in `<installdir>\Metalogix\MAM4Microsoft Exchange\Services\PamExSchedulerSv\PamSchedulerSv.exe.config`. For more information see the following table:

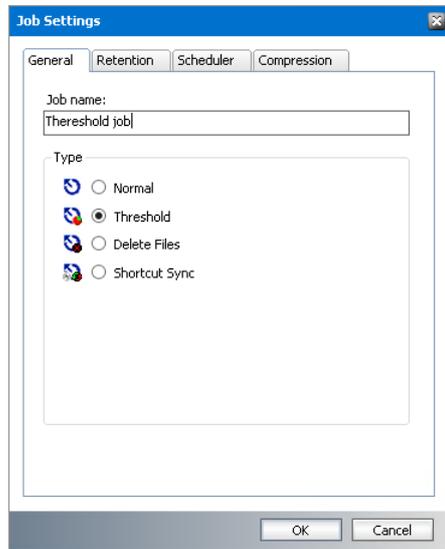
Filtering	Config key	Value/default	Description
By message size	ThresholdMinimumSize	4	Minimum size (in KB) of the email which can be included in the threshold processing. All emails smaller than the defined size are not archived.
By age	ThresholdMinDate	0	If value > 0, messages which are younger than x days are excluded from processing.
By folder	ThresholdExcludeFolders	-	Semicolon separated list of exclude folders defined for the threshold job. The syntax is the same as in case of group exclude folders.
By message class	ThresholdMessageClasses	-	Semicolon separated list of include message classes for the threshold job.

The Threshold job runs in the background with pre-defined settings. Archived emails are replaced with a shortcut and the space is released for further usage.

## To define a Threshold job:

1. In **Manager** view, click on the **Jobs** tab.
2. Click with your right mouse button inside the left pane. A context menu appears. In the context menu select **New job**.

3. In the **Job Settings** window that appears, select **Threshold** on the **General** tab. Do not forget to enter a name in the **Job name** text box. Then specify your scheduling criteria on the remaining tabs.



**i** | **NOTE:** There can be **ONLY ONE Threshold job** defined.

## Shortcut Sync job

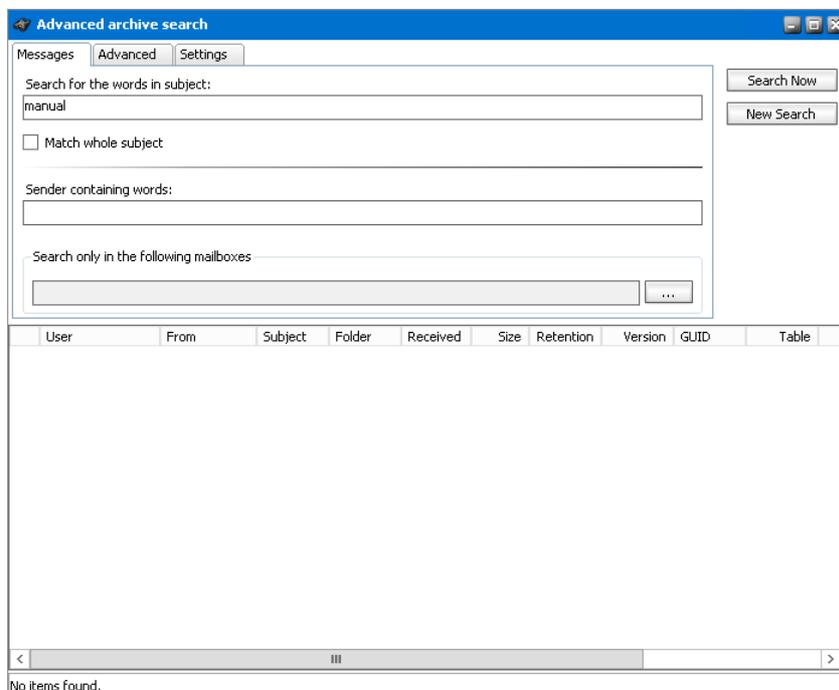
A user may have decided to delete in his MS Outlook a shortcut to an archived item (for example if the user thinks he will not in the future wish to restore the item) or may have moved the shortcut from one folder to another. If he uses the **Delete archived messages** icon on the toolbar or **Delete selected messages** on the MAM4Microsoft Exchange menu in MS Outlook, which is AddIn functionality, then such items are marked in the HSM store for deletion. Those items, nonetheless, are kept in the HSM store during their retention period. Upon the expiration of their retention period and eventually their keep-alive time items marked for deletion may be **COMPLETELY DELETED** via **Delete Files** job, if such is scheduled. Providing the Delete Files job is not scheduled, emails remain in the archive.

On the other hand, if the user fails to use AddIn functionality and uses the **Delete** icon on the toolbar or presses the **SHIFT** key along with the **Delete** key on the keyboard then the respective shortcut is deleted as well, but since these are **NOT** AddIn functionalities (they are Microsoft features) the result will be different. Items whose shortcuts were deleted in MS Outlook in this way will lose their reference in MS Microsoft Exchange store but will not be marked in the metabase for deletion. We call them “lost items”. Such lost items can be restored; we will explain that later (see the section “Archive tab”).

What is the purpose of the Shortcut Sync job? The purpose is to keep the metabase consistent with MS Microsoft Exchange Server. Therefore, Shortcut Sync job searches through synchronized mailboxes for shortcuts to items having been archived in the HSM store. Archived items with no reference (with no shortcut) in the MS Microsoft Exchange store are subsequently marked for deletion (or **COMPLETELY DELETED** should their retention time be 0). *However, the retention*

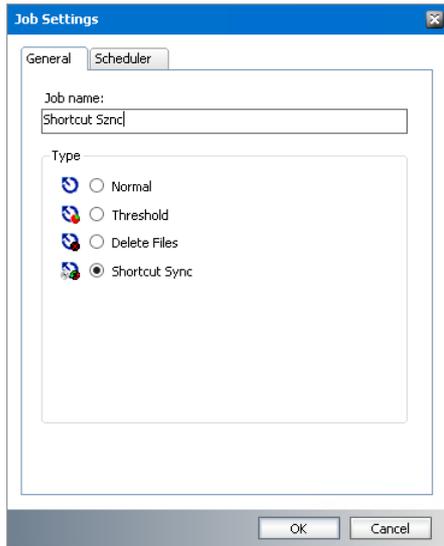
category used for archiving of these items must have been the retention category which allows the **Shortcut Sync** job to operate. (see the section “Creating a retention category”).

**i** **IMPORTANT:** Keep in mind that any lost item can be restored by the administrator (see the section “Lost items restoring”) during its retention period *until* you run this Shortcut Sync job. Upon running this job, all lost items activated for clean-up by Shortcut Sync job are marked for deletion. They cannot be restored e.g. on the **Archive** tab in **Archive Manager for Exchange**. Therefore, be careful when using this Shortcut Sync job; use it only in cases when you are sure that no more lost items need to be restored so that the space they occupy could eventually be freed up for further usage following expiration of the retention period. But even though items marked for deletion cannot be easily restored they can still be found (during their retention period) using our full-text search engine while residing in the HSM store. To find the documents marked for deletion, use the **Search in archive** icon on the toolbar (🔍) (For more information see “Toolbar icons”) or **Archive Manager Client AddIn**. In the **Archive Manager Advanced Search** window such items marked for deletion will be displayed with a blue icon, as shown on the following figure.



## To define the Shortcut Sync job:

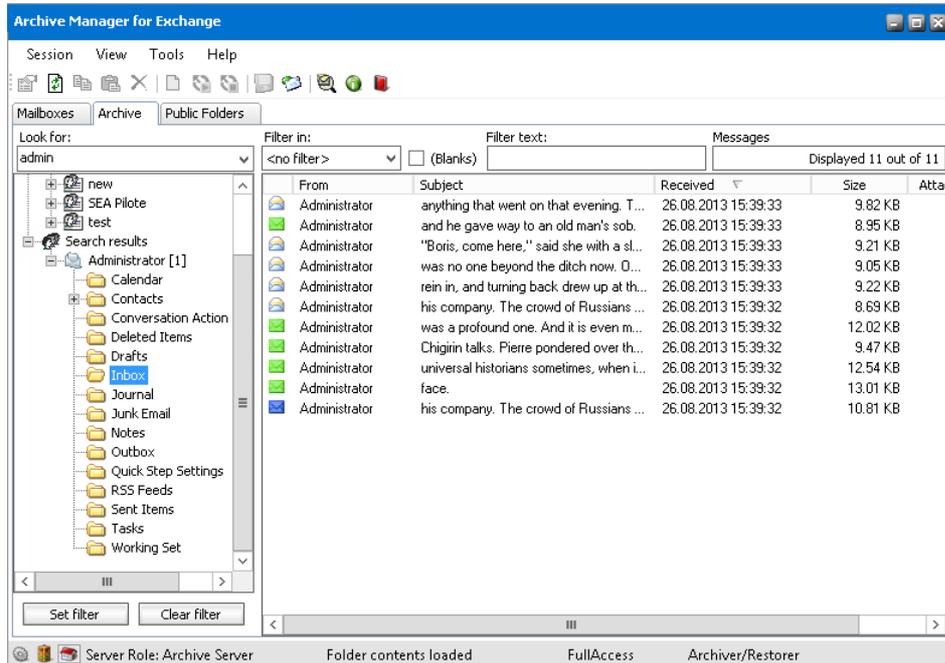
1. In **Manager** view, click on the **Jobs** tab.
2. Click with your right mouse button inside the left pane. A context menu appears. In the context menu select **New job**.
3. In the **Job Settings** window that appears, select **Shortcut Sync** on the **General** tab. Do not forget to enter a name in the Job name text box. Then specify your scheduling criteria on the **Scheduler** tab. Finish by clicking **OK**.



**NOTE:** There can be ONLY ONE Shortcut Sync job defined. As with other scheduled jobs, the Shortcut Sync job runs in the background with predefined settings.

Archived emails having been marked for deletion reside in the HSM store during retention period. They can be found in **Archive** view, on the **Archive** tab only. You will see them displayed in blue. They can be restored manually (see the section “Mailboxes tab”).

On the next figure we show you examples of lost emails (the ones displayed blue).



# Delete Files job

The purpose of the **Delete Files** job is to purge following items from the archive:

- Items marked for deletion upon expiration of their Retention + Keep alive time
- Items whose Delete time, if such was defined, has elapsed (Delete time = maximal time for which the items can reside in archive)

**i** **TIP:** Undelete feature of Archive Manager for Exchange allows user to list archived items that are marked for deletion in Outlook folder.

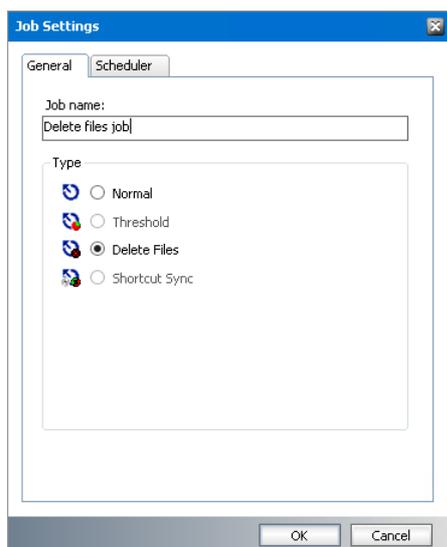
If the Undelete feature is implemented, user can perform Undelete operation on such items marked for deletion. After the undelete operation the item(s) will have the same status as regular archived items. Upon expiration of their retention time they will still reside in the archive. For details on how to configure this feature in 3 simple steps see the "[Activating Undelete Feature](#)" short guide.

In the previous section we described how certain items can be marked for deletion. Once marked, such files can be deleted from the HSM store upon the expiration of their retention period – and this is done by the **Delete Files** job. THIS JOB REMOVES THEM DEFINITELY FROM THE ARCHIVE, thus freeing up space in your archive for further usage.

As with other scheduled jobs, the **Delete Files** job shall run in the background with predefined settings. BUT BE CAREFUL WHEN USING THIS JOB AS IT COMPLETELY DELETES EMAILS FROM ARCHIVE (after their Retention + Keep alive time or Delete time has elapsed).

## To define the Delete Files job:

1. In **Manager** view, click on the **Jobs** tab.
2. Click with your right mouse button inside the left pane. A context menu appears. In the context menu select **New job**.
3. In the **Job Settings** window that appears, select **Delete Files** on the **General** tab. Do not forget to enter a name in the **Job name** text box. Then specify your scheduling criteria on the **Scheduler** tab. Finish by clicking **OK**.



**i** | **NOTE:** There can be ONLY ONE **Delete Files** job defined. As with other scheduled jobs, the **Delete Files** job runs in the background with predefined settings.

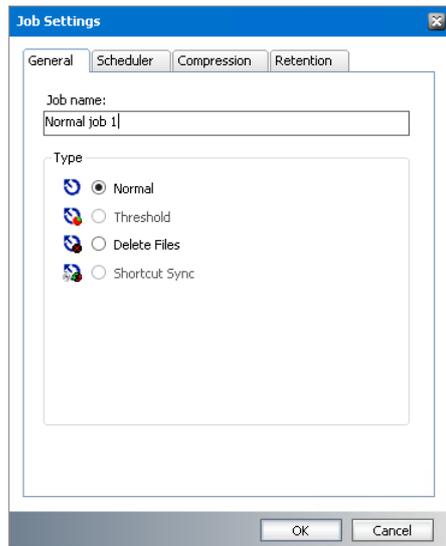
## Normal job

In previous sections we have described five pre-defined types of jobs. All of them are unique. The fifth one, the normal type is used for archiving of emails of a specific group. There are no limitations as to the number of normal jobs.

### To define a Normal job:

1. In **Manager** view, click on the **Jobs** tab.
2. Click with your right mouse button inside the left pane. A context menu appears. In the context menu select **New job**.
3. In the **Job Settings** window that appears, select **Normal** on the **General** tab. Do not forget to enter a name in the **Job name** text box.
4. Then specify your scheduling criteria on the **Retention**, **Scheduler**, and **Compression** tabs. Finish by clicking **OK**.

**i** | **NOTE:** To archive emails of a specific group, the job has to be assigned to that group (see the following section [How to archive emails of a group via a job](#)).



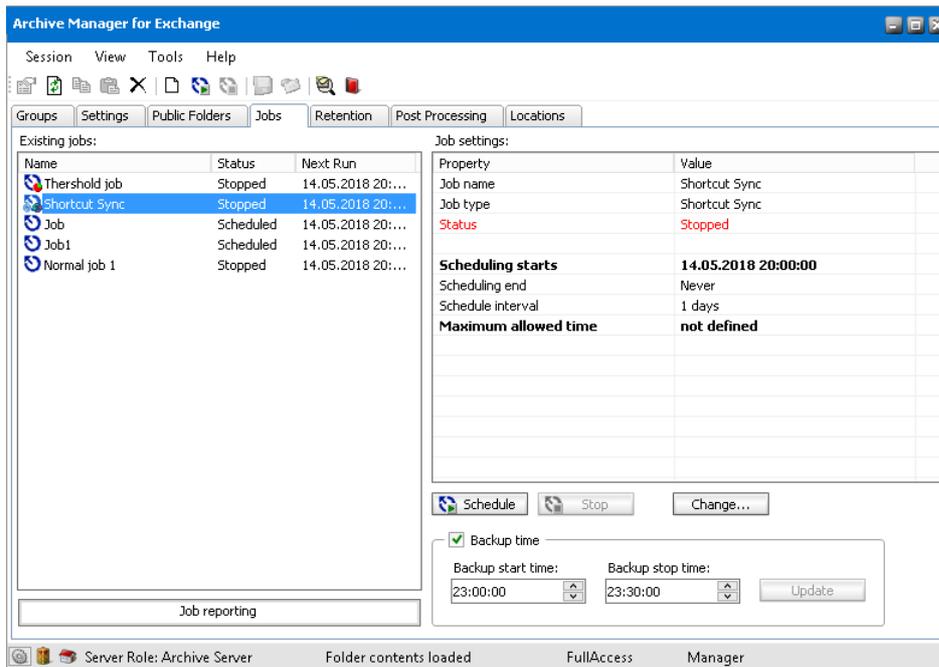
Jobs that you create will be displayed in the left pane on the Jobs tab (in Manager view). Under the Status field you may check their current status.

- Scheduled (displayed green) means that the job is scheduled and currently archiving emails or in a stand-by mode until it restarts again;
- Stopped (displayed red) means that the job, although might be scheduled, is currently not active.

In the right pane you will see the respective job's settings displayed.

Change the status to Scheduled simply by clicking on the **Schedule** button or by right-clicking the respective job and selecting **Schedule** in the context menu. You may stop an already scheduled job by clicking on the **Stop** button or by right-clicking the respective job and selecting **Stop** in the context menu.

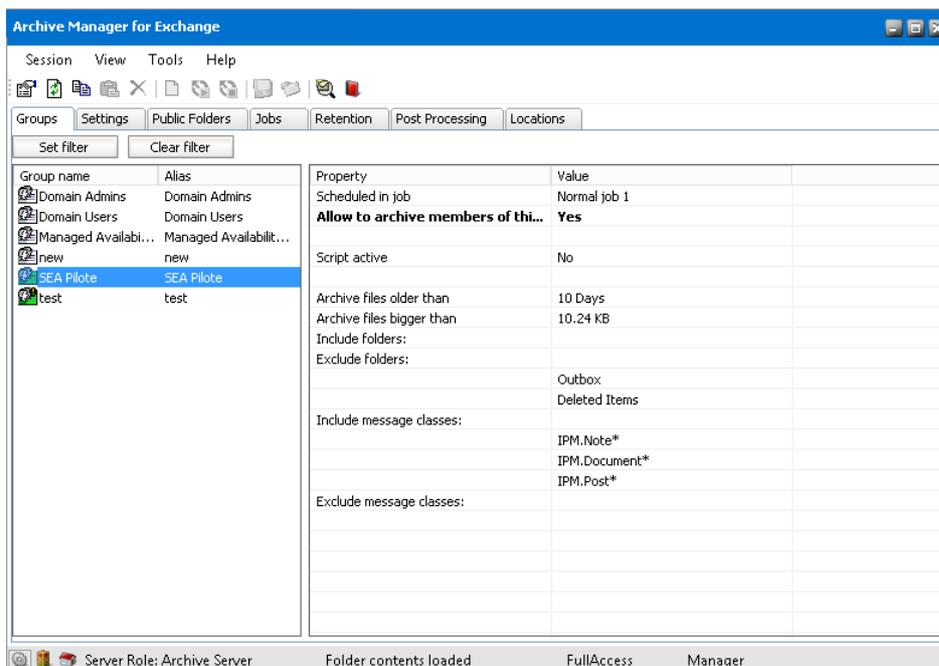
At the bottom of the right pane you should specify the backup time, in other words the period during which jobs are not supposed to run, in order to activate database backup. If it is not set, no archiving is possible. Just enter the time in the **Backup start time** and **Backup stop time** fields and then press **Update**. You may for instance schedule your database backup over night. Pay attention to this backup period, as no jobs should be running at that time.



**NOTE:** Jobs which are running at the moment are highlighted in green in the **Existing jobs** pane of the **Jobs** tab.

## How to archive emails of a group via a job

On the figure below you can see the **Group** tab of the **Manager** view. List in the left pane displays groups of users synchronized with Archive Manager. Some group icons are displayed in green, the others not. Green indicates that the group has been activated for archiving.



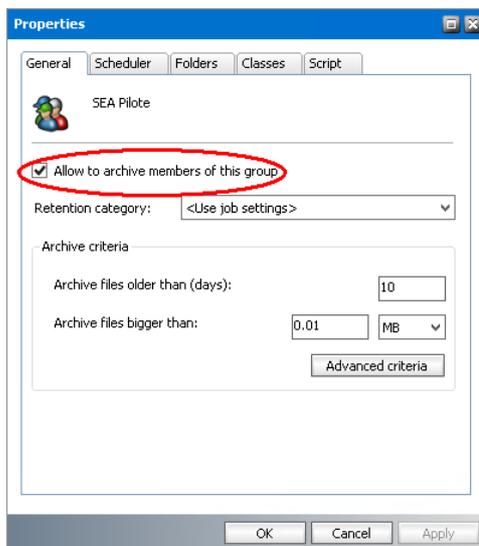
When you select a group on the **Groups** tab its properties are subsequently displayed in the right pane.

The right pane is useful as there you can see some of the group's properties. For example on the previous figure you can see that SEA Pilote is activated for archiving (Activated: Yes), scheduling will be done with 9pm-archiving (Scheduled in job: 9pm-archiving), Outbox and Deleted items folders are excluded from automated archiving (Exclude folders: Outbox, Deleted items), all files bigger than 10.24 MB will be archived (Archive files bigger than: 10.24 MB), message classes that will be archived include IPM.Note, IPM.Post, IPM.Document (Included message classes: IPM.Note, IPM.Post, IPM.Document).

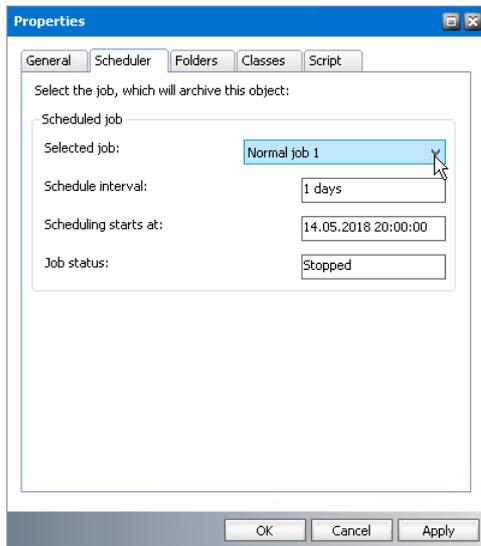
**i** | **NOTE:** For more information on group settings see the section “Setting criteria for group archiving”.

## To archive emails of a group via a desired job:

1. In **Manager** view click on the **Groups** tab.
2. Right-click a desired group and, in its context menu, click **Properties** to open its **Properties** window.
3. On the **General** tab check if that group has been activated for archiving (the **Allow to archive** check box must be selected). Then click **Apply**.



4. On the **Scheduler** tab select the desired job in the **Selected job** dropdown menu. Click **Apply** and **OK** to confirm all.

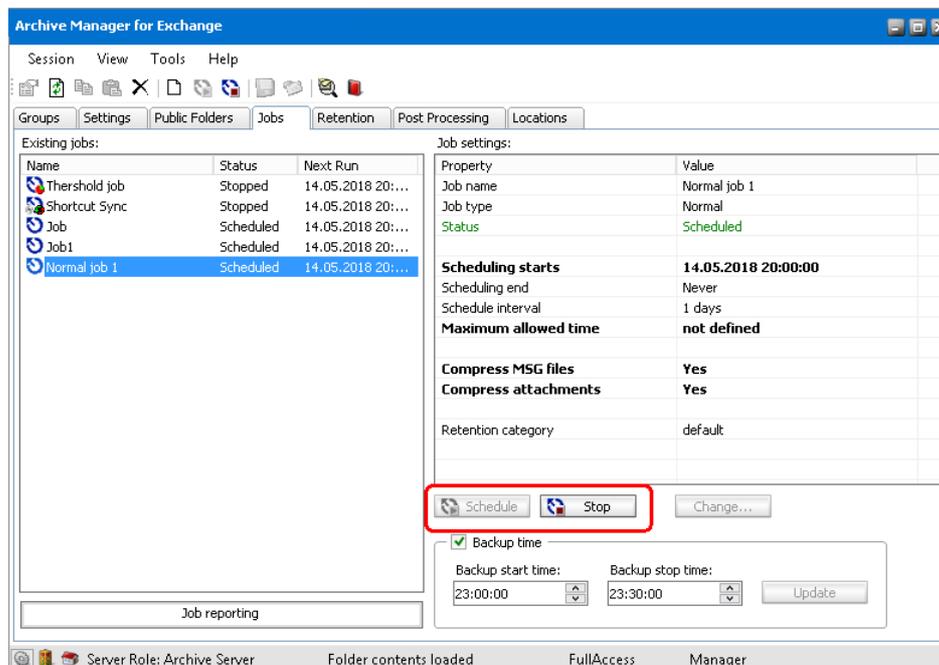


## How to change job settings

Job settings cannot be changed while the job is scheduled or running. You need to stop it first.

### To change job settings:

1. In **Manager** view, click on the **Jobs** tab.
2. Select the desired job. Then click on the **Stop** button in the right pane. (Or you may right-click the respective job and in its context menu click **Stop**.)



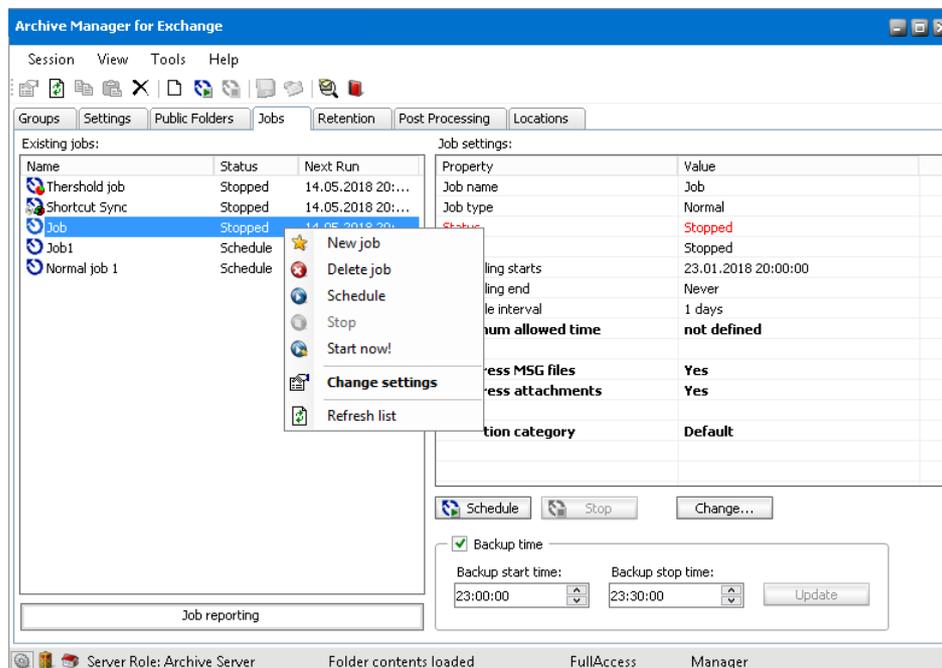
3. Then click on the **Change** button (  ) next to the Stop button (or right-click the respective job and, in its context menu, click **Change settings**).

4. In the **Job Settings** window specify your new settings on the respective tabs.
5. When it is done, do not forget to click on the **Schedule** button (  ) in the right pane to schedule the job again (or right-click it and, in its context menu, click **Schedule**).

## How to start a job running immediately

### Steps to start a job running immediately:

1. Go to the **Jobs** tab in **Manager** view.
2. Select the desired job – either stopped or a scheduled one. Right-click it and in the context menu select **Start now!** The respective job will start running immediately.



**NOTE:** Jobs which are just running are highlighted in green in the **Existing jobs** pane of the **Jobs** tab.

## How to stop a scheduled job

### Steps to stop a scheduled job:

1. Go to the **Jobs** tab in the **Manager** view.
2. Select the desired scheduled job. Right-click it and in the context menu select **Stop**. The respective job will stop running and its status will be changed to *Stopped* (displayed red)

**i** | **NOTE:** You always need to stop a job if you want to change its settings. Settings of a scheduled or running job cannot be changed.

## Job reporting

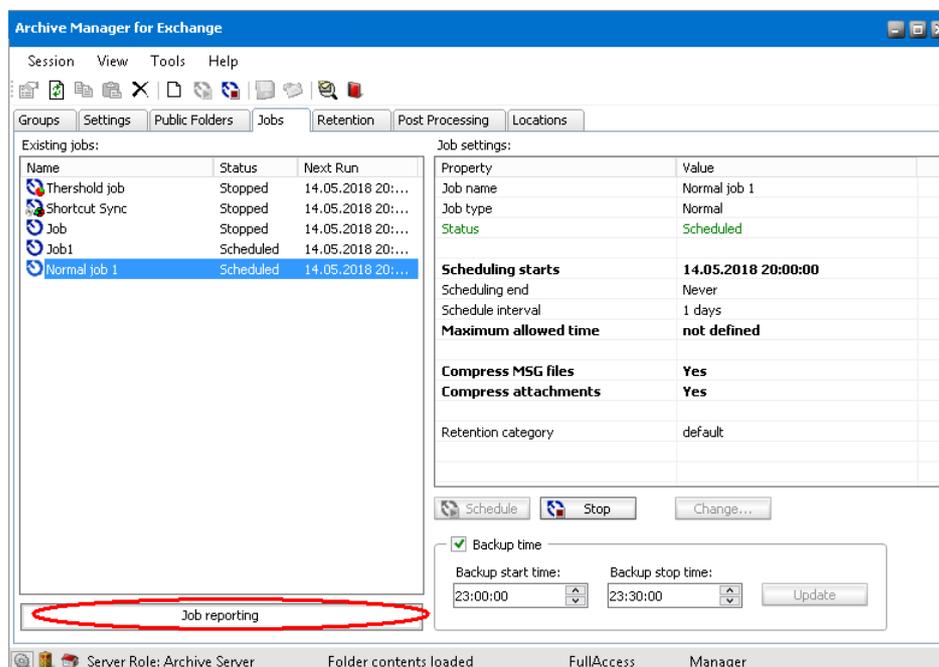
**Job reporting** is a feature which allows the administrator to see how many messages are waiting (are scheduled) for archiving, i.e. how many messages were given to the asynchronous archiving service (DirectArchive service).

The messages are collected from different sources: scheduled jobs. When a “source” decides to archive messages, it simply puts them into a database table. The asynchronous service periodically reads this table and processes messages, depending on job settings.

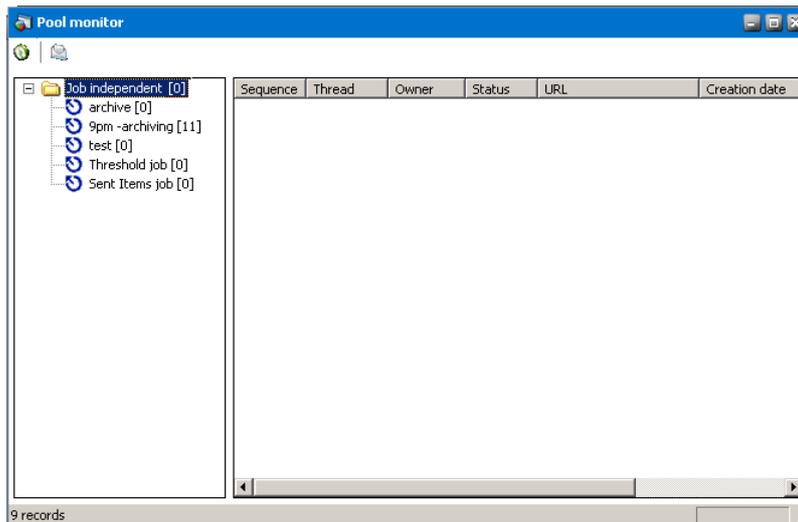
The job reporting feature simply displays the content of that database table: it displays **ONLY** those messages that are queued for processing. The content is automatically categorized by the start time of the job.

### Steps to see the status or how many messages are queued for archiving:

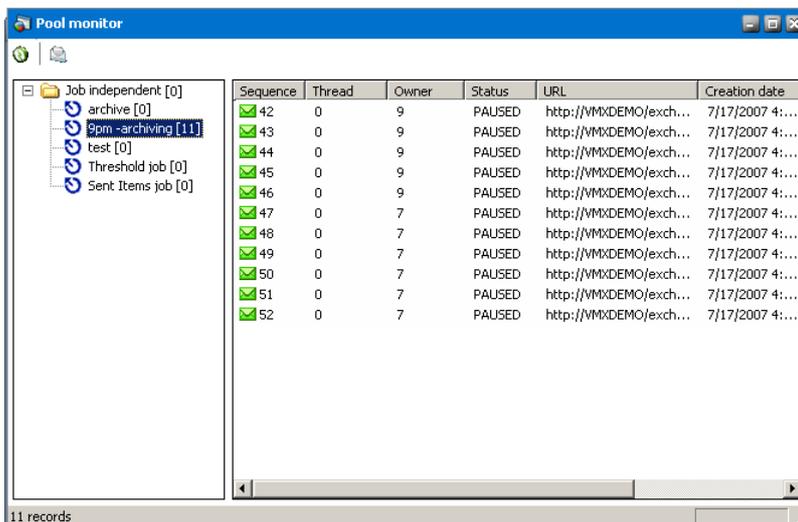
1. In **Manager** view, click on the **Jobs** tab. All jobs you have defined so far are displayed in the left pane. At the bottom of that pane, click on the **Job reporting** tab to open the **Pool monitor** window.



2. In the **Pool monitor** window unfold the **Job independent** node. You will get displayed all your jobs. Number next to the job indicates how many emails assigned to the job are waiting to be processed. Under the **Job independent** folder you can find emails from DirectArchive which are waiting to be processed.



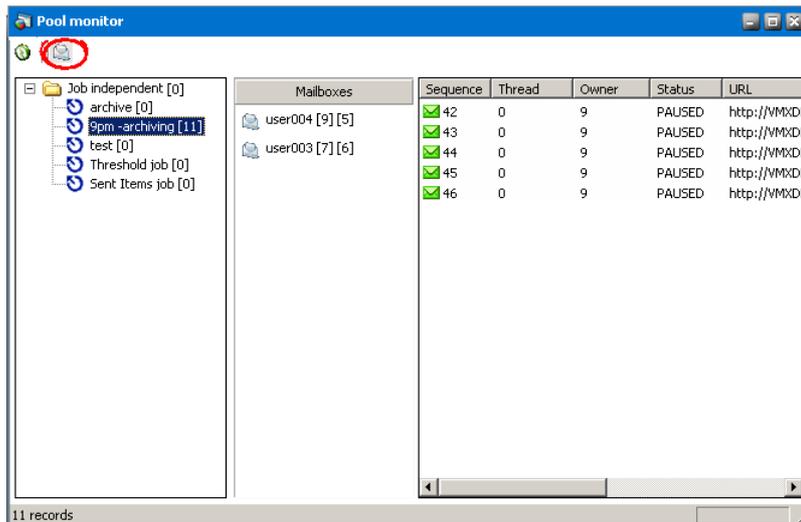
3. To get more details about the chosen job simply click on it. Items to be processed by that job appear in the right pane of the window. The number of items is displayed also at the bottom in the left corner. Click the **Refresh** icon to update the situation.



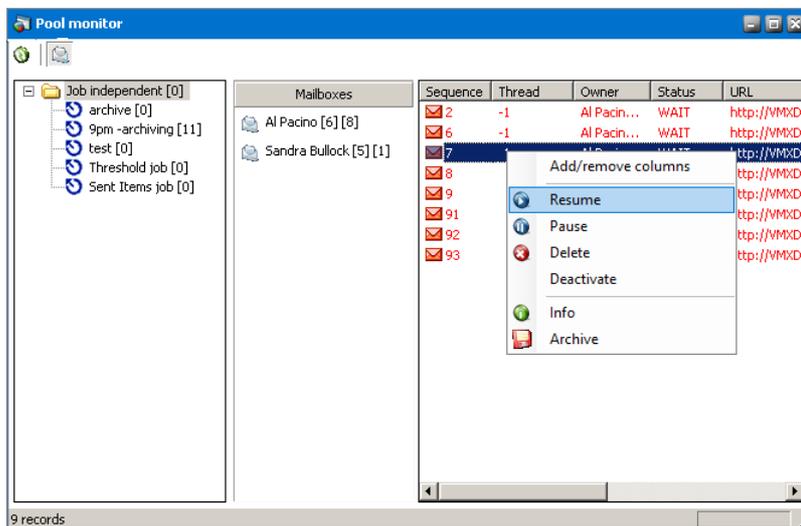
**i** **NOTE:** A lot of useful information can be found in the list view, e.g. the sequence number of the item (Sequence), ID of the owner (Owner), Status (WAIT - waiting to be processed or PAUSED – the respective job is stopped), location of the mailbox item (URL), the date of creation (Creation date), number of unsuccessful attempts to process the item (Error count), ID of the job in charge of the item (Job) etc.

4. Click the **View switcher** icon (📧) next to the Refresh icon to display the **Mailboxes** pane. In this pane you can see mailboxes from which the selected job is archiving or mailboxes of job independent items. The first number in square brackets next to the mailbox is the mailbox ID, the second number is the number of emails waiting to be archived in that mailbox.

Click on the mailbox node (in our example user004) to display the waiting items of that mailbox.

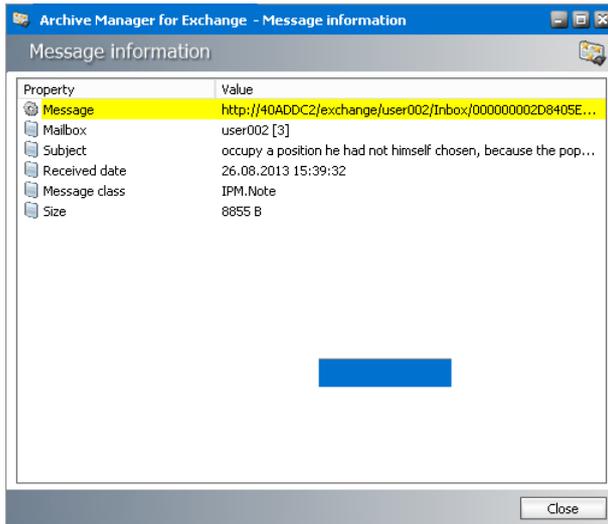


- If archiving of an item failed even after several attempts, it is displayed red. In such cases you may try to archive it again. Right-click the item and select **Resume** in the context menu.

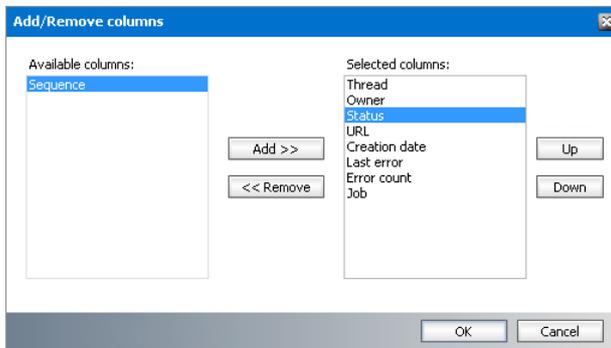


There are other options in the context menu for any item as well:

- **Pause** – archiving of that item will be paused, i.e. will not be process in that cycle, however, it will be processed in the subsequent cycle.
- **Deactivate** - the respective item will never be processed by the job in question.
- **Delete** – the item will be deleted from the list.
- **Info** – Message information window opens displaying location, mailbox, subject, receive date, message class and size of the selected message



Select **Add/Remove columns** option to customize the order and selection of columns in the list view of the **Pool monitor**.



## Retention tab – Retention Categories management

On the **Retention** tab of the **Manager** view different retention categories for email archiving can be set (e.g. retention category for short-term documents, retention category for long-term documents etc.). In other words, various types of emails require different ways of archiving and the time for which they need to be stored and retrievable can differ as well. Further we discuss the usage of retention categories, their description and management from the end-user point of view.

Various features of retention categories enhance the adaptability of Archive Manager for Exchange for individual users together with the email life-cycle management. Emails can now be archived with two-tier delete and manipulation protection. Tier one defines the retention time in which archived emails can be neither deleted nor moved to different storage media – these policies vary according to company or state regulations. Tier two allows the administrator to transfer emails to long term storage media or delete them.

The shortcut creation time known simply as “shortcut delay” can be defined allowing Blackberry users’ access to mails and attachments that have already been archived. The “Delete shortcut

after a time” feature can be used to reduce the number of “redundant” shortcuts left in the Microsoft Exchange Store after a specific number of days, months or years.

The retention categories which are created here can be assigned to jobs on the **Jobs** tab.

**i** | **IMPORTANT:** The default retention category needs to be specified on the **Tools/Options/Archive settings/Retention** tab. For more information see [Archive settings](#). This category will be applied if no specific category is selected, e.g. for direct archiving and manual archiving using AddIn.

## Retention categories and their usage

The following types of settings are available:

### Settings related to emails in the HSM Store:

- **Retention time** – the archived email is not delete-able from the HSM Store for the defined time period. Retention time is thus the MOST CRUCIAL feature of Archive Manager for Exchange related to law regulations. Emails ‘deleted’ using functionalities of Archive Manager for Exchange or Outlook Addin are actually only marked for deletion and they reside in the archive until this retention time expires.
- **Delete time** – the email, although not marked for deletion, is automatically deleted (by the Delete Files job) from the archive after the expiration of the defined time period. It is the MAXIMAL time for which the emails reside in the HSM Store. This time period cannot be smaller than the retention time.
- **Keep-alive time** – it is the time period after email deletion, during which the deleted email can be turned back to the store. However, this is possible only if the Delete time has not elapsed yet.

### Settings related to emails on the MS Microsoft Exchange Server:

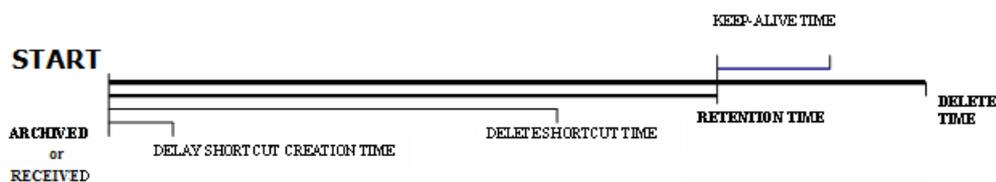
- **Keep the original email** – email is archived but it is not modified in any way (no icon, no shortcut, keep residing on the MS Microsoft Exchange Server). This option is used just for backup.
- **Delete original email** – the email is removed from the MS Microsoft Exchange Server immediately after archiving, no shortcut is created thus it is not reachable from the user’s mailbox and it is displayed as “lost” in the Archive view.
- **Create shortcut** – the email is archived and it is replaced with a shortcut. This type of archiving saves the space on the MS Microsoft Exchange Server and at the same time activates the user to

work with the archived email just as with non-archived one. Email can be replaced with the shortcut immediately or it is kept without changes for the defined time period and after its expiration shortcut is created (“Delay shortcut creation by” option ).

- **Delete shortcut after a time** – the shortcut of the email is automatically removed from the MS Microsoft Exchange Server after the expiration of the defined time period (email cannot be reached from the user’s mailbox any longer and is displayed as ‘lost’ in the Archive view). However the email still resides in HSM Store.

The starting point of all the above mentioned times (except the Keep-alive time) is either the moment of archiving or the moment of receipt. The starting point can be set when the retention category is created.

**! CAUTION:** Please consider carefully the retention settings, especially when setting receive time as the starting point. If a message has been received e.g. 6 months ago and your retention time/delete time is just 3 months, the message will be archived. However, it can be deleted from the archive immediately, as 3 months has already passed since the beginning of its retention time.

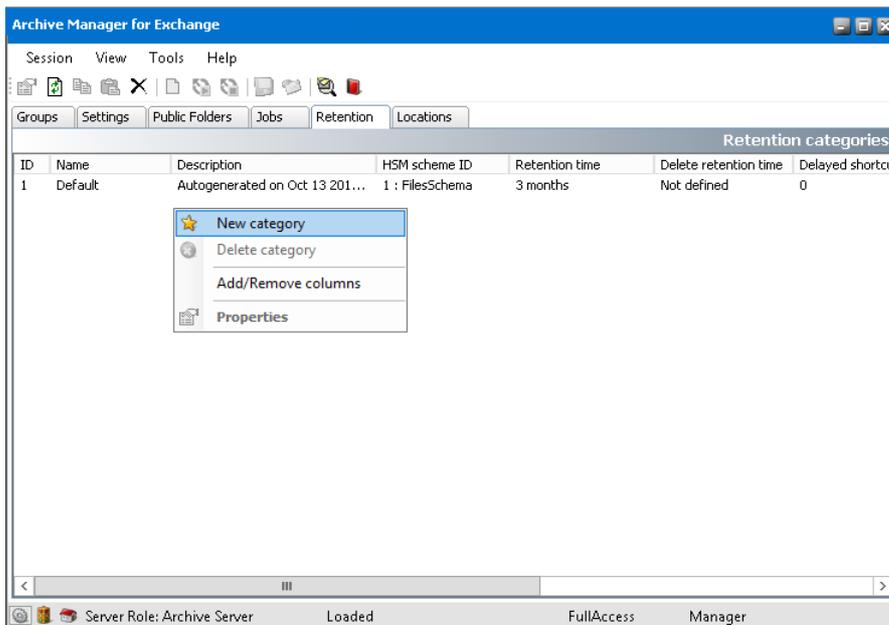


In addition to the default retention category created during installation the administrator is able to create any number of retention categories satisfying specific criteria of the enterprise. The retention category consists of a name, a description, the above mentioned retention times and of the HSM scheme. It is fully manageable from **Archive Manager for Exchange**.

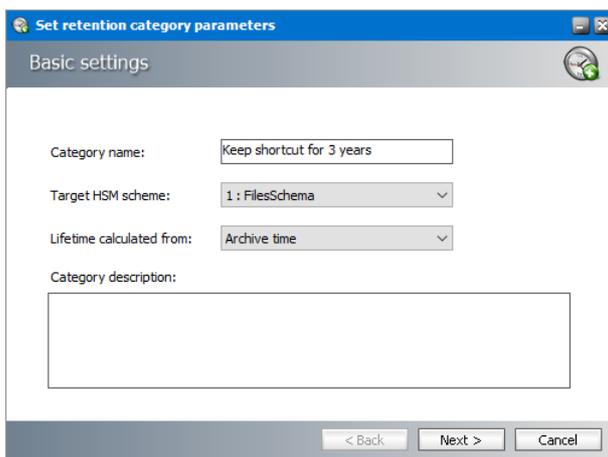
## Creating a new retention category

### Steps to create a new retention category

1. On the **View** menu click **Manager**.
2. Click on the **Retention** tab.
3. Right-click inside the list view, select **New category** from the context menu and navigate through the wizard as follows:



4. **Basic settings** window pops-up. Enter the name for your retention category in the **Category name** text box (e.g. Keep shortcut for 3 years).



5. In the **Target HSM scheme** dropdown box choose the target scheme which will be used for archiving. In the HSM system you may define different HSM Schemas, which are virtual categories for documents. (One HSM Schema has been created at installation of Archive Manager for Exchange and you may have created more HSM Schemas during the setup of Archive Manager for Exchange, each with a particular number assigned to it.)
6. In the **Lifetime calculated from** dropdown box you can choose from two options – Archive time and Receive time; i.e. you can define here the starting point from which the all the retention related times should be calculated. Either it will be the time when the item gets archived (Archive time) or it will be the item's Received time.
7. In the **Category description** text box fill in a short description of the new category.
8. Click **Next**.
9. In the **Document lifetime** window specify your settings.

It is strongly recommended paying very much attention to these settings as they define the time period for which the emails are archived.

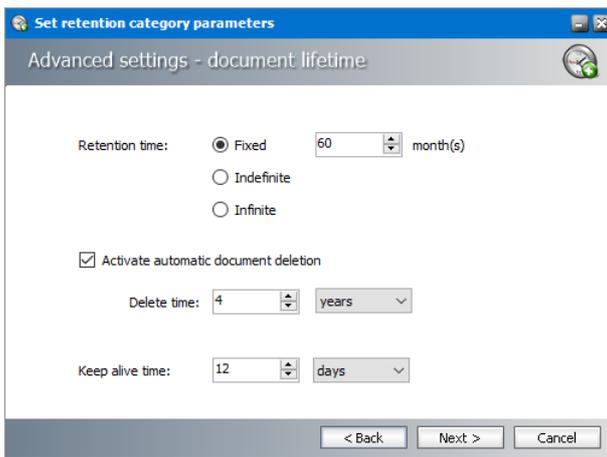
Set the **Retention time**. During this period none of the emails in the HSM store archived via this retention category can be removed from the archive. It is possible to select:

- **Fixed** period (set the desired period)
- **Indefinite** period (the retention time is not set specifically but can be defined later)
- **Infinite** period (retention is everlasting)

Select Activate automatic document deletion check box and specify Delete time if you want to COMPLETELY DELETE an archived emails whose retention time has elapsed from the HSM Store after a defined time.

**i** | **NOTE:** Activate automatic document deletion option applies to emails which are not marked for deletion.

By specifying the **Keep alive time** you set the time period for which the email, deleted after its retention time has elapsed, will be still kept in the HSM Store. Just use the arrows to set the time or directly overwrite it. Delete and Keep alive time can be set in days, months or years.

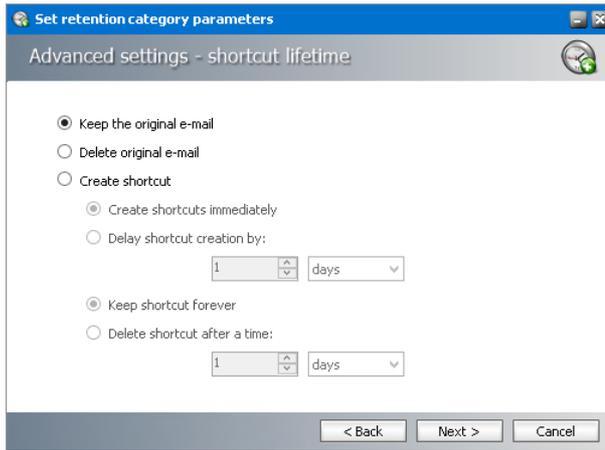


**i** | **NOTE:** The Delete time cannot be smaller than the Retention time. **Pay due attention to these crucial settings as here you set the time for which emails exist in the archive.**

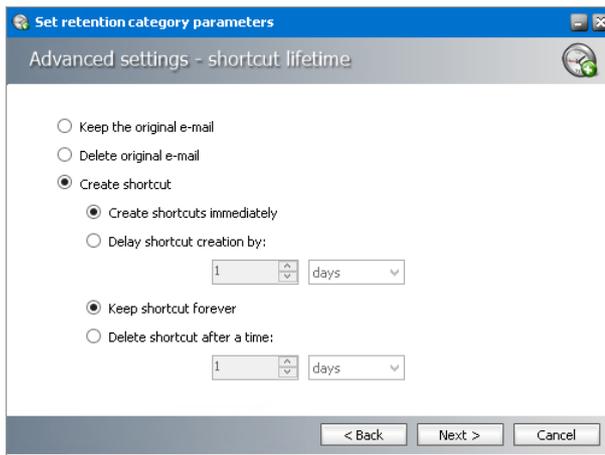
10. Click **Next**.

11. In the **Shortcut lifetime** window you can choose from three options:

- a. **Keep the original e-mail** – select this option, should you wish to archive email and not to modify it in any way. In this case **no shortcut** will be created and the whole email will reside in the MS Microsoft Exchange Server. In the **Archive** view on the **Mailbox** tab such item will be displayed with the following icon: 



- b. **Delete original e-mail** – select this option, should you wish to delete all original email from the MS Microsoft Exchange Server immediately after its archiving. **No shortcut** is created and the email is not accessible from the user’s mailbox. In the **Archive** view such item is displayed as *lost*.
- c. **Create shortcut** – select this option, should you wish to replace the original email with a shortcut after archiving and thus make it accessible for the user and save the space on MS Microsoft Exchange Server at the same time.



In case you have selected the **Create shortcut** option, further settings become available and you can adjust shortcut behavior to meet your needs. You can choose if the shortcut creation will follow immediately after archiving of the email (**Create shortcut immediately** radio button) or will be delayed for the specified period of time (**Delay shortcut creation by** radio button) when e.g. Blackberry users will be able to view their attachments. While no shortcut is created, the email is displayed in the Archive view with the following icon:



Moreover, you can decide whether you want to keep the shortcut in the user’s mailbox until the user deletes it (**Keep shortcut for ever** option) or the shortcut will be deleted automatically after the defined time (**Delete shortcut after a time** option).

12. Click **Next**.

13. **Extra settings** window pops-up. If the **Allow automatic deletion of unreferenced emails** check box is selected, emails archived via this category will be marked for deletion whenever the

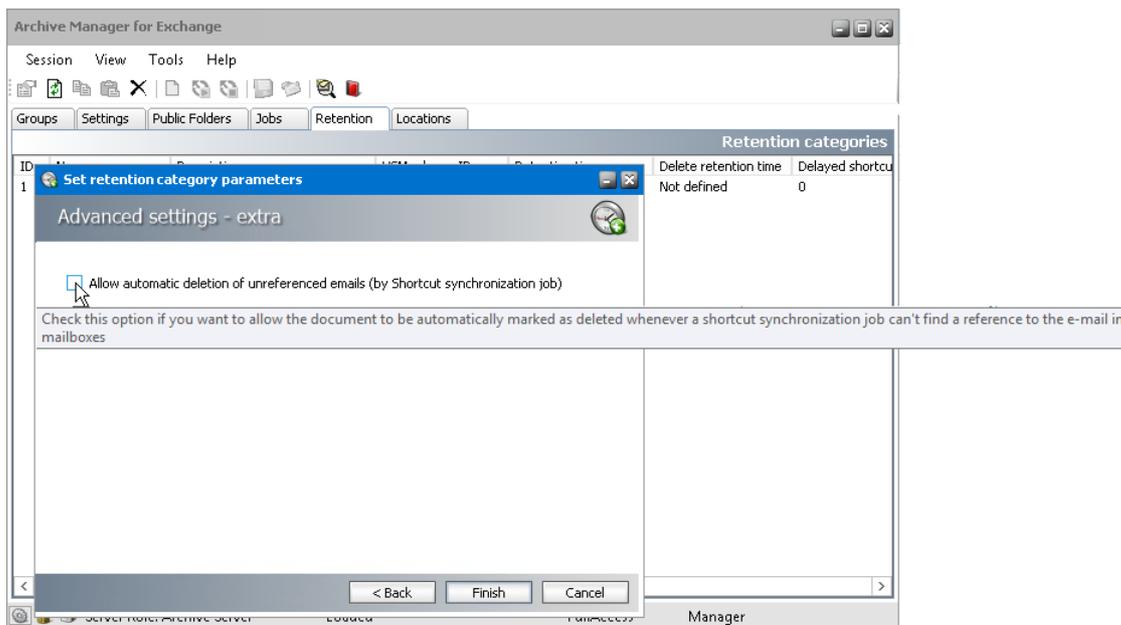
Shortcut Sync job cannot find the reference to the emails in any of the users' mailboxes. If the check-box is not selected, Shortcut Sync job will not mark eventual "lost items" for deletion (see the section "Shortcut Sync job").

**Example:**

- I. Emails are archived by a retention category with **Allow automatic deletion of unreferenced emails** checked and shortcuts are left in the Microsoft Exchange Server
- II. You delete shortcuts from Microsoft Exchange (either by removing the shortcuts manually in a mailbox, or by deleting a folder in Outlook that contains shortcuts etc.) → emails become "lost items"
- III. You run the Shortcut Synchronization Job → lost items are marked for deletion

**!** **CAUTION:** If the items were archived with 0 retention time and with **Allow automatic deletion of unreferenced emails** allowed, the Shortcut Synch Job deletes them COMPLETELY.

- IV. Items marked for deletion are deleted from archive when their Retention (and Keep alive) time elapses and you run the Delete Files job



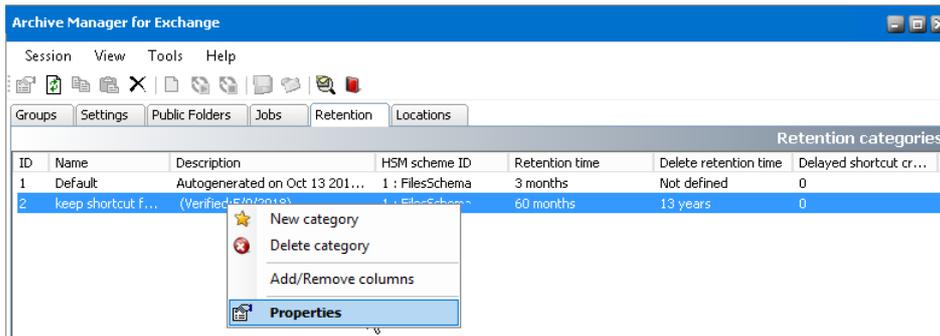
**i** **IMPORTANT:** Items marked for deletion still reside in the HSM Store but cannot be restored using Archive Manager for Exchange, e.g. on the Archive tab.

14. Click **Next** to finish the creation of the new retention category.

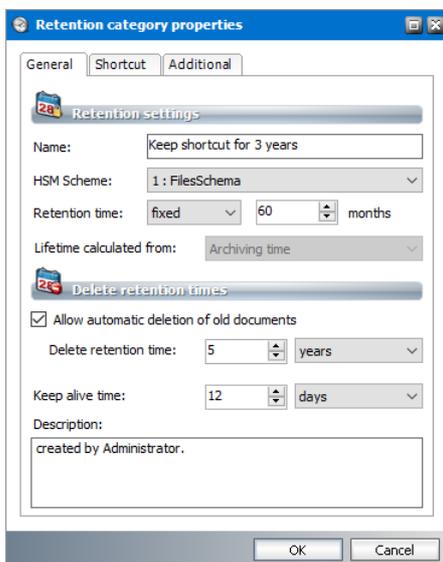
# Changing the settings of a retention category

## To change the settings of an existing retention category:

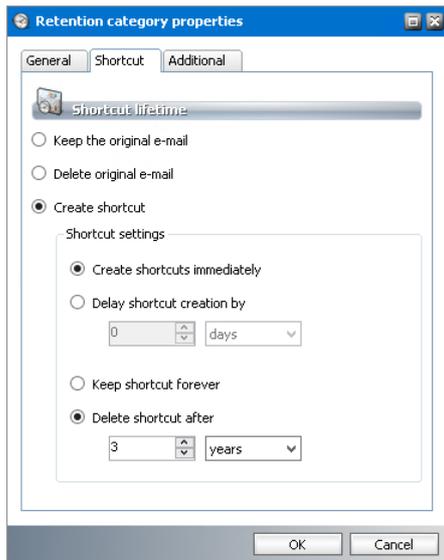
1. Double-click the selected retention category to open the **Retention category properties** window (or right-click it to open its context menu and select **Properties**).



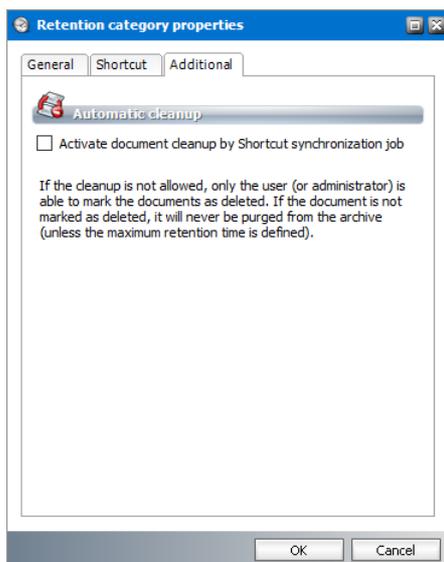
2. On the respective tabs specify your new settings for the retention category. On the **General** tab you can change the name, HSM Scheme, retention time, keep alive time as well as allow automatic deletion of old documents and modify related Delete retention time. Click **Apply** and **OK**.



3. Shortcut settings can be modified on the **Shortcut** tab. Click **Apply** and **OK** to apply the new settings.



4. On the **Additional** tab set the shortcut synchronization behavior – if the **Activate document clean-up by Shortcut synchronization job** check box is selected, emails archived via this category will be marked for deletion (or completely deleted if their retention time is 0) whenever the Shortcut synchronization job cannot find the reference to the emails in any of the users' mailboxes. If the check box is not selected, Shortcut synchronization job will not mark them.



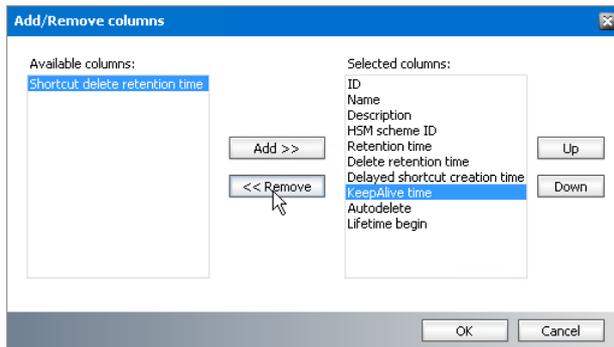
5. Click **Apply** and **OK** to apply your settings.

## How to customize retention categories list view

After right-clicking any retention category on the Retention tab, the context menu appears.

- **Add/Remove columns** – click it in case you want to add or remove columns from the list view. Add/Remove columns window opens. To add/remove a column, select the desired one from the **Available columns/Selected columns** list. Then click on the **Add/Remove** button.

To change the order of the selected columns click the one you want to move and use the **Up** and **Down** buttons. Click **OK**.



- **Delete category** – retention category can be deleted only if nothing was archived via this retention category

## Locations tab

For better performance and to secure load balancing Archive Manager for Exchange provides you with the possibility to install several Archive Manager servers even in several locations (for more information on Archive Manager locations and server roles see the section “General tab”).

After you have:

1. installed your Archive Manager servers
2. assigned the servers their server roles on the **Tools /Options/Server settings** tab

You should:

3. register the servers as Archive/Retrieve servers here on the **Locations** tab of the **Archive Manager for Exchange**.

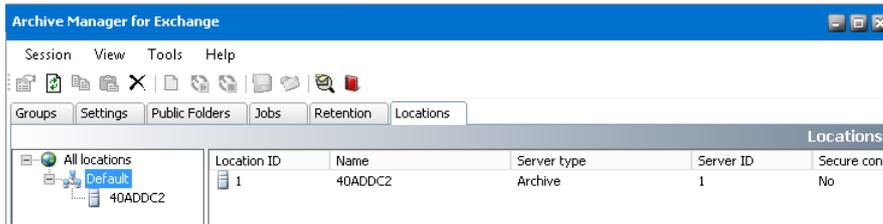
**i** | **NOTE:** If you have only ONE Archive Manager server installed, you do not need to register it.

It needs to be mentioned that only the right pane of the **Locations** tab is active for adding, editing or deleting. Left pane has been reserved for information purposes.

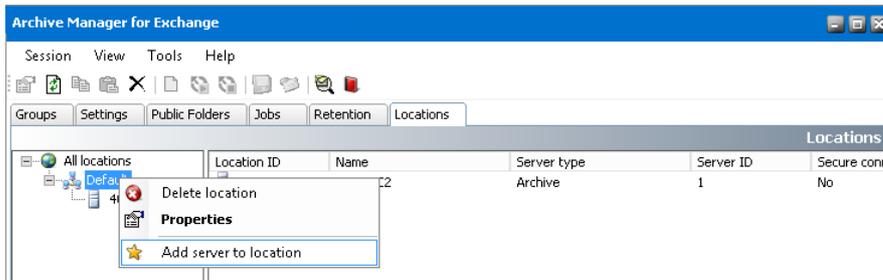
## Registering Archive/Retrieve sever

### To register a new server:

1. In **Manager** view click on the **Locations** tab.
2. Expand the **All locations** node in the left pane of the window to see the default location and its servers. In our example the “Default” location contains only one server “VMXDEMO”.



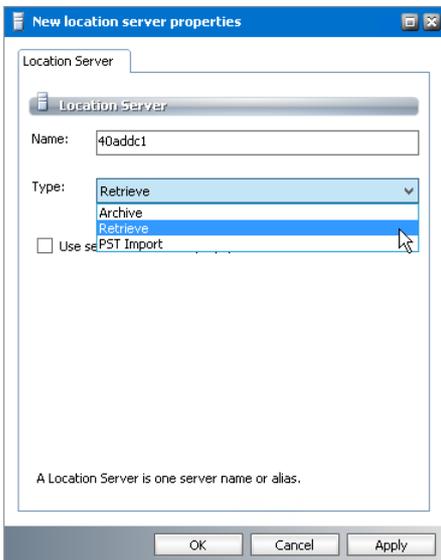
- Right-click the location where you want to add the new server and select **Add server to location** in its context menu.



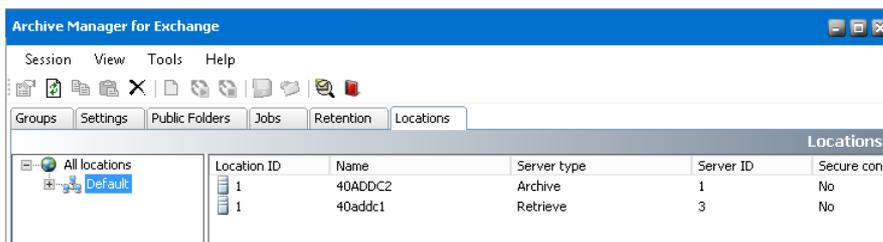
- In the **New location server properties** window enter the name of the server in the Name text box. Specify the server type in the **Type** down-drop box.

Check **Use secure connection (https)** if you use “https” in your domain communication.

**NOTE:** If users are using Outlook Addin please make sure that they can access the entered location server. If users are using a proxy server, make sure that the location server is accessible through the proxy.



- Click **Apply**, then **OK**. The new server will appear in the right pane of the **Locations** tab.

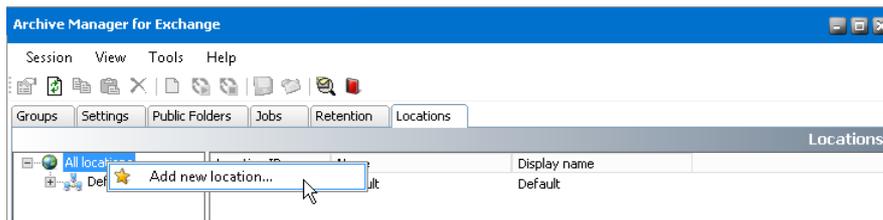




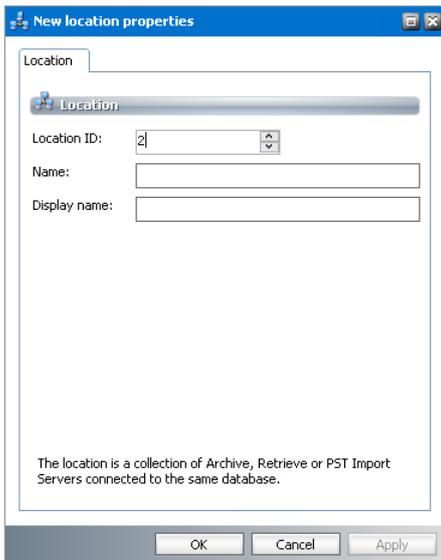
**NOTE:** To delete the server from the list just right-click it in the left pane and select **Delete server from the location** option in the context menu.

## To add a new location:

1. In **Manager** view click on the **Locations** tab.
2. Expand the **All locations** node in the left pane of the window to see the all locations and its servers.
3. Right-click the All locations and select the **Add new location** option.



4. In the **New location properties** window enter the name and display name in the respective text boxes. You can change the location ID as well.



5. Click **Apply**, then **OK**.

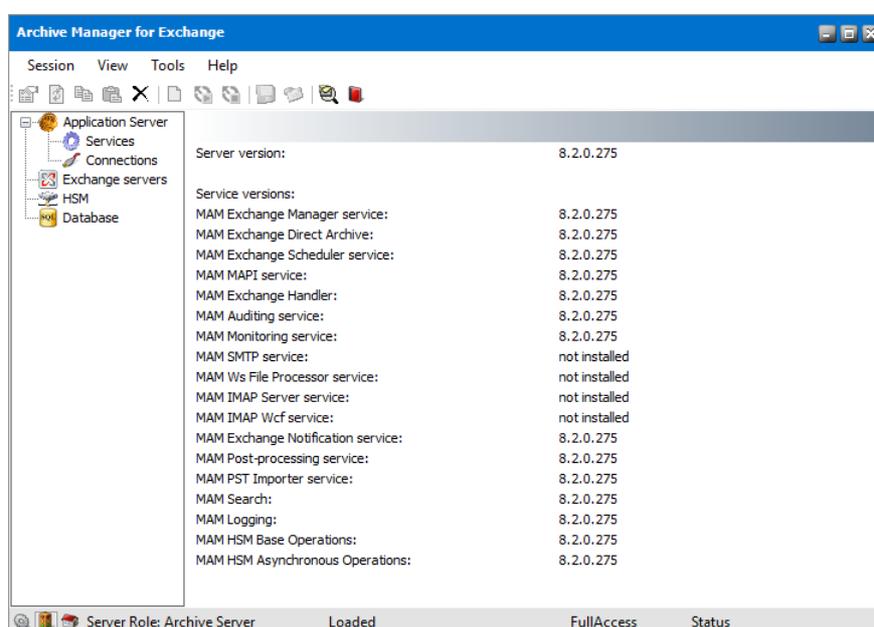


**NOTE:** To add a new server to the new location follow the steps described earlier in this chapter. To delete/edit a location, right-click it and select **Delete location /Properties** in the context menu.

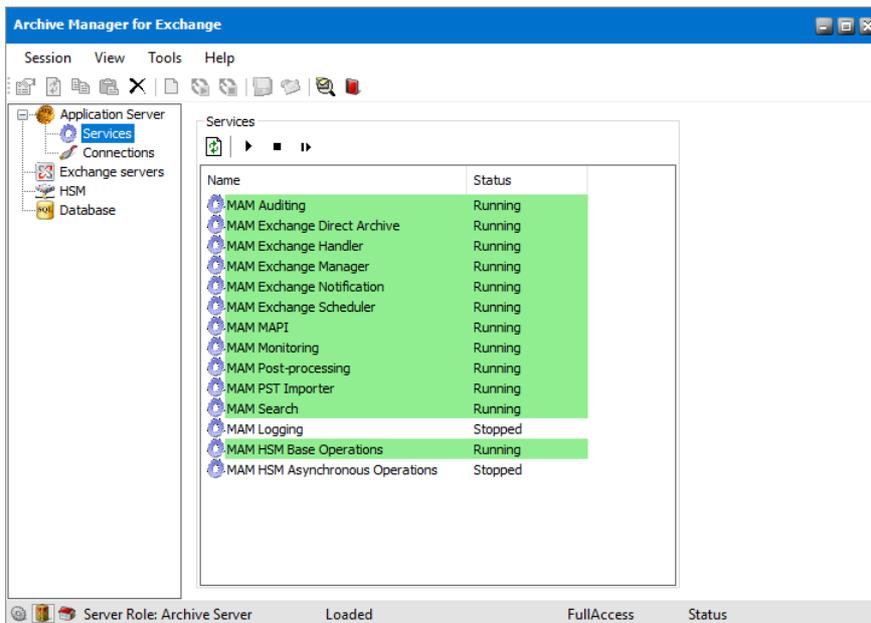
## Status view

Status view is displayed by clicking **Status** on the **View** menu. By clicking on different nodes in the left pane of the **Status** view you will display information on current version of Archive Manager for Exchange, logged-on users, status of services, database, HSM Store etc.

By clicking on the **Application Server** node in the left pane you will display some detailed information about the current version, as shown below:

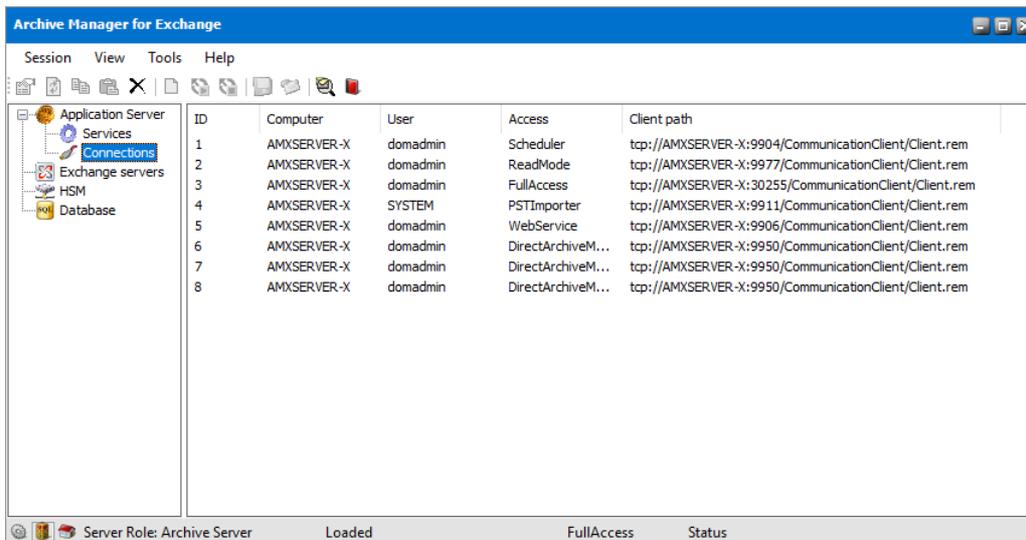


By clicking on the **Services** node in the left pane you will see all Archive Manager for Exchange services and their status.



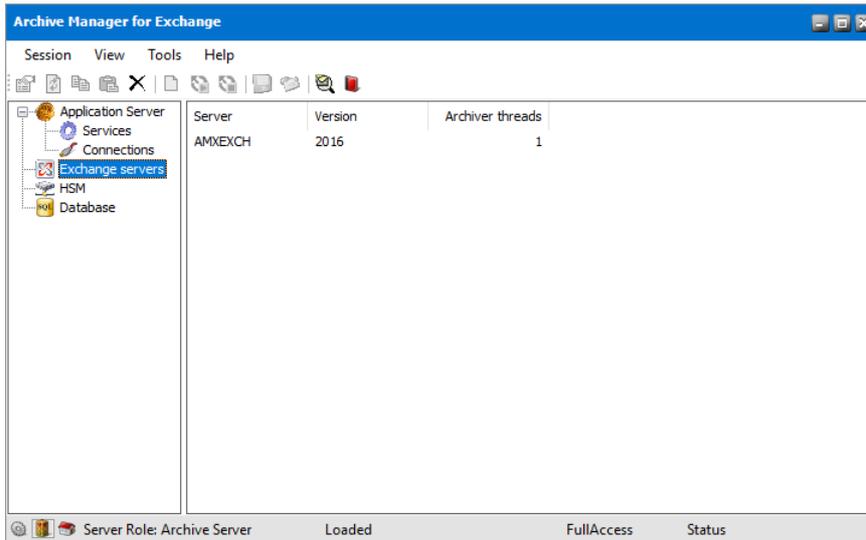
Services can be restarted by clicking on the **Restart** button. You can use the Stop button (  ) to stop the selected service and then the Start button (  ) to start it again.

By clicking on the **Connections** node in the left pane you will display current connections and logins. Here you can find out access rights etc.

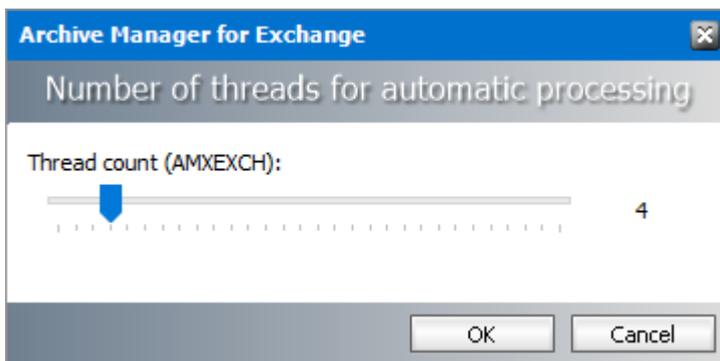


**Archive Manager for Exchange** can run on several computers in parallel and can communicate with several MS Microsoft Exchange servers.

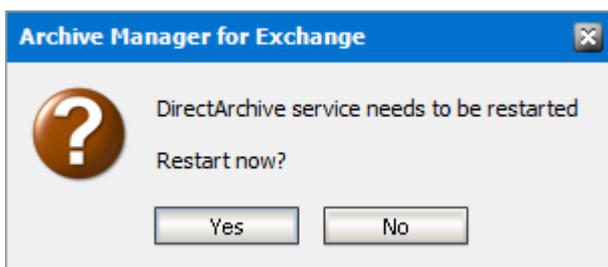
By clicking on the **Microsoft Exchange servers** node a list of synchronized MS Microsoft Exchange servers will be displayed, including the number of threads.



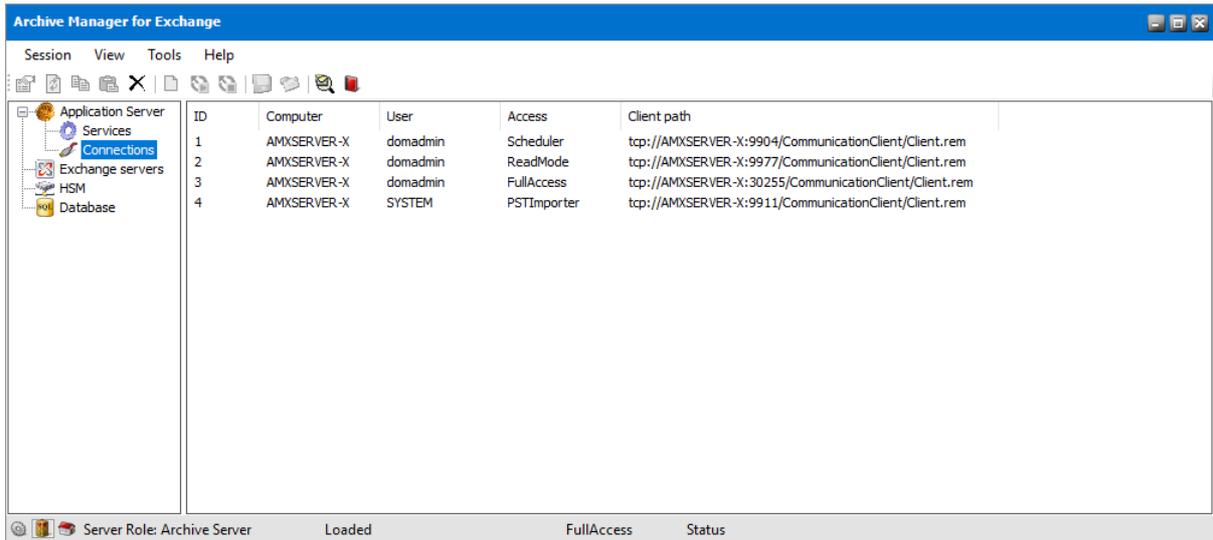
To change the number of threads, double-click a desired Microsoft Exchange server. In the **Threads** window simply set the number of threads to be processed in one cycle. The higher the number, the less number of cycles you have – it however slows down the system. An optimal number is from 15 to 20.



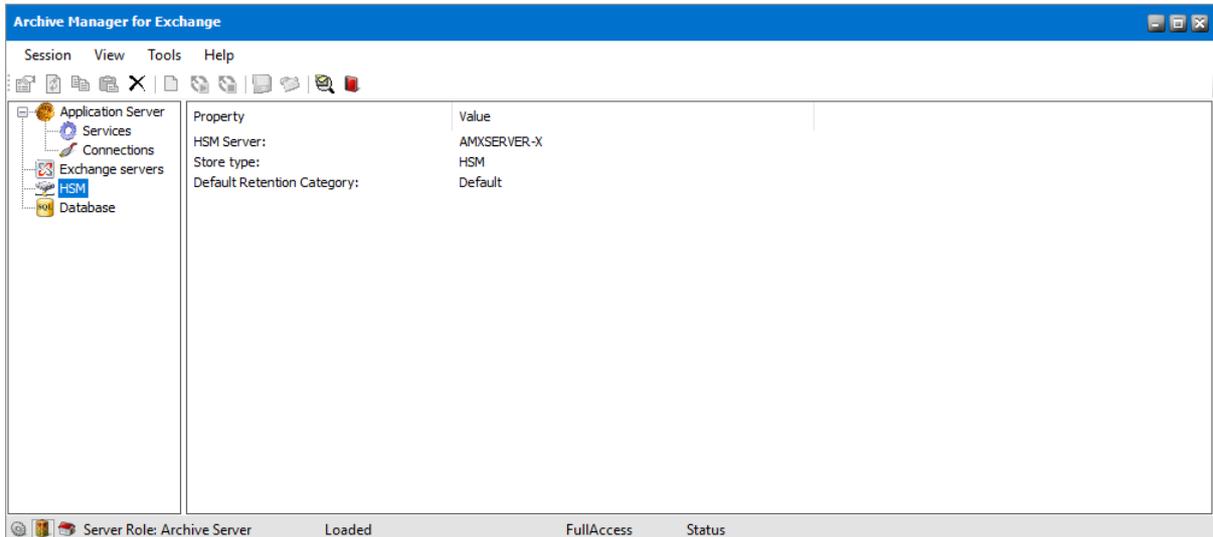
If you, for instance, set the number of threads to 4 and click OK.



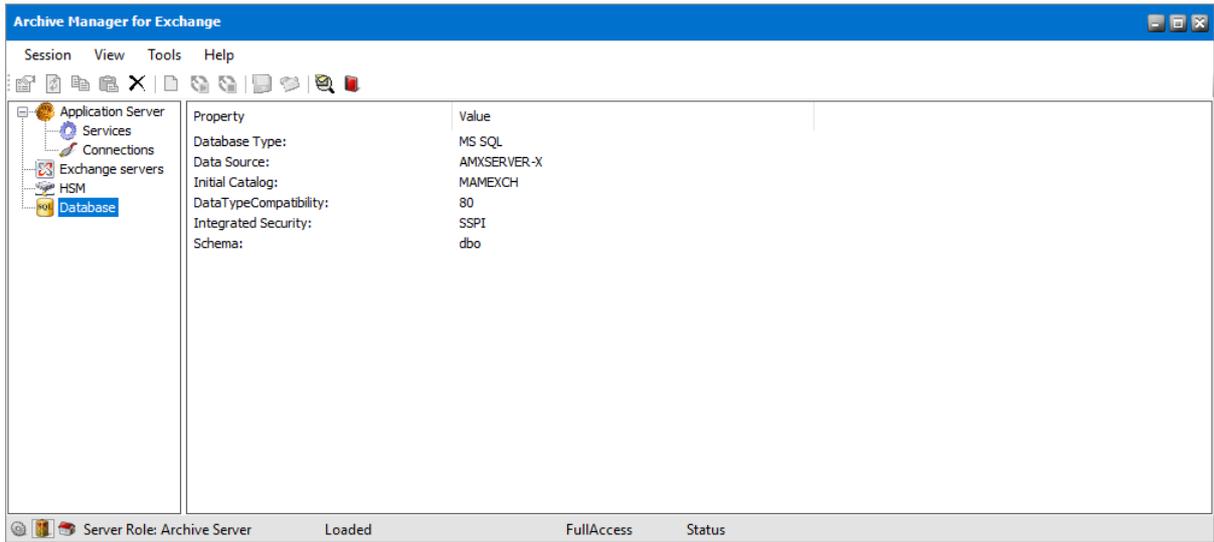
Click **Yes** to restart the service. Then by clicking on the **Connections** node, 4 entries will be displayed (see the following figure).



By clicking on the **HSM** node you will retrieve some information on your **HSM store type**, **HSM/Archive Manager Server** and the ID of the default **Retention Category**. This is for informative purposes only.



By clicking on the **Database** node some information about the database in use will be displayed. This information is taken from the **DB Config** tool.



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## Archive view

**Archive** view has been designed for shortcut repairing, for manual archiving/restoring (Mailboxes and Public folders tabs) and for browsing purposes. Even restoring of lost items is possible in this view (**Archive** and **Mailboxes** tabs).

There are four tabs – **Mailboxes**, **Archive**, **Public Folders** and **Public folders Archive** tabs.

### Mailboxes tab

This tab is used for:

- Manual archiving/restoring of an item/folder/mailbox
- Repairing shortcuts
- Archiving only certain type of messages or mailbox folders(via Archive wizard)
- Restoring only certain type of messages (via Restore wizard)
- Lost items restoring on a mailbox level (via Restore wizard)
- Manual creating of shortcuts for archived items with “delay shortcut” settings

### Before archiving with Archive Manager for Exchange

Before archiving with Archive Manager for Exchange all users and groups whose mailboxes you plan to archive need to be synchronized with Archive Manager for Exchange Server (see “Installation Guide for Archive Manager for Microsoft Exchange”). Keep in mind that archiving cannot be applied to emails received by mailboxes that were not synchronized with the Archive Manager Server.

The synchronization process can be automated, i.e. the synchronization can be scheduled in the **Archive Manager for Exchange\Tools\Address Book Manager** and can run in the background (see “Installation Guide for Archive Manage for Microsoft Exchange”).

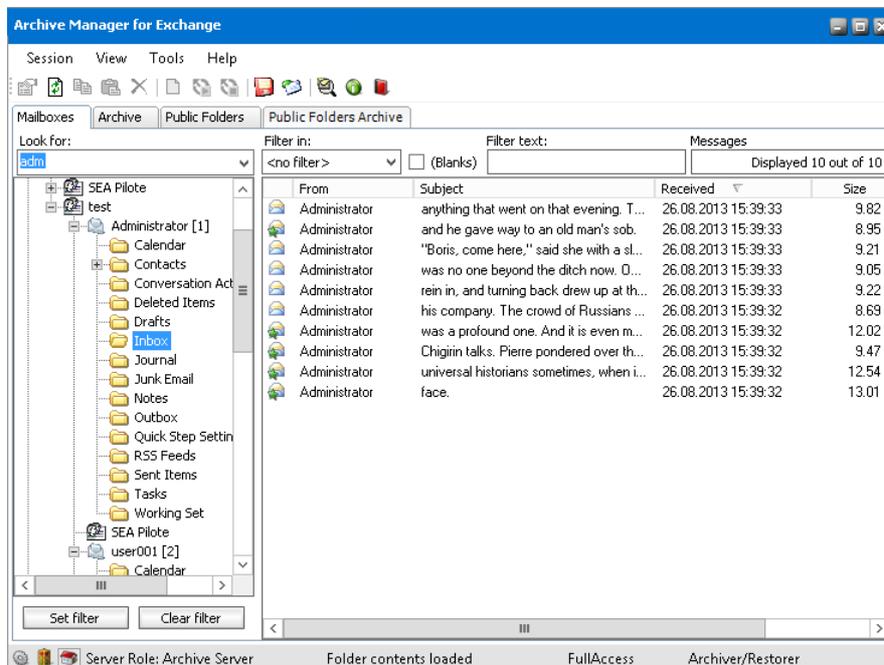
When mailboxes are synchronized with Archive Manager Server you may start archiving with Archive Manager for Exchange.

**i** **NOTE:** The archiving services are configured to run automatically (service type set to “Automatic” in **Start\Settings\Control panel\Administrative tools\Services**) and some of them are running under the super-user account. If some services are not started, it is necessary to start them manually using the included Start.bat batch file under **C:\Program Files (x86)\Metalogix\MAM4Microsoft Exchange\Tools**. If it does not help, please review

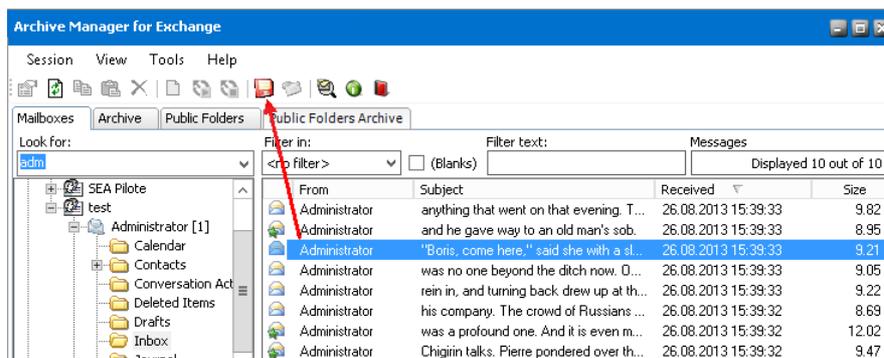
the event log entries (**Start\Control panel\Administrative tools\Event viewer**). The most common problem of not starting services is the incorrectly configured identity – in this case either run an update (repair) of the Archive Manager for Exchange setup or correct the service identities manually (using **Start\Programs\Administrative Tools\Computer Management**).

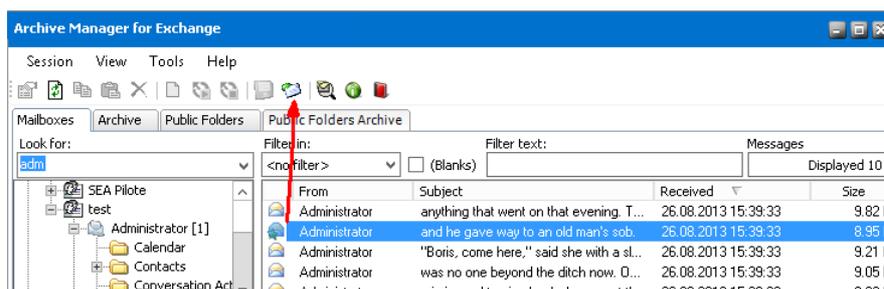
Simply display a desired mailbox in the left pane. Use the **Look for** combo box, enter the respective name and press **Enter**. Should you enter an asterisk, a list of all groups and mailboxes will be displayed. It is possible to find the desired mailbox while using the **Set filter** button as well. Once you have displayed the desired mailbox folder you may start archiving/restoring emails placed in that mailbox.

**i NOTE:** Mailboxes have a unique identity number which is displayed in square brackets to distinguish mailboxes in the case where two mailboxes have the same display name. The unique identity helps the administrator to identify the correct mailbox.



For archiving and restoring you may use the **Archive** and **Restore** icons on the toolbar and the context menu as well. On the following figure we have selected a non-archived email therefore the **Archive** icon on the toolbar is accessible. On the next figure we have selected an archived email therefore the **Restore** icon on the toolbar is accessible.

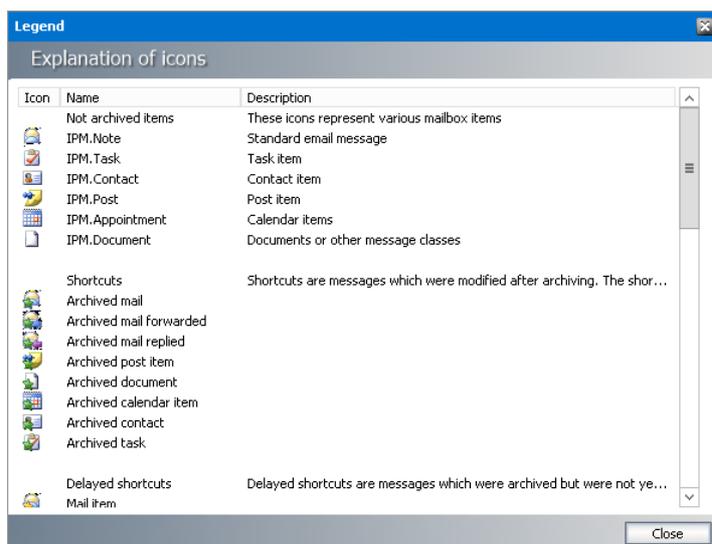




The right pane of the **Archive** view displays the content of a folder selected in the left pane of the window.

**NOTE:** Only the left pane is active for switching between folders, mailboxes, and groups. The right pane has been reserved for manual email archiving/restoring.

Every item of the folder has its icon which represents the status of the item. You can open the legend for icons when you click the **Show legend** icon on the toolbar (📖) or from Enterprise Manager/Archive view/Archive tab when you right-click an item in the right pane and select **Show legend** from the context menu. The **Legend** window with icon explanation appears:



## How to manually archive an item

To archive individual items without using a job, use manual archiving.

For manual archiving of items placed in mailboxes – use the **Mailboxes** tab in the **Archive** view.

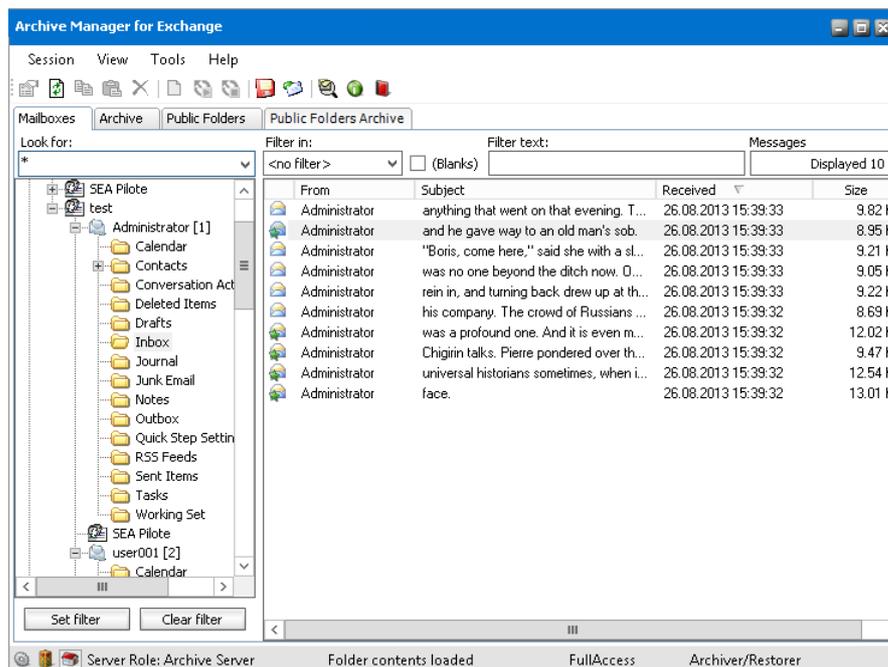
For manual archiving of items placed in public folders – use the **Public folders** tab (see the section “Public folders tab (Archive view)”).

## To archive items of individual mailboxes manually:

1. Click **View** on the **Archive Manager for Exchange** menu bar. Select **Archive**.
2. Click on the **Mailboxes** tab.
3. Find the desired mailbox in the left pane. You may use the **Look for** combo box for that purpose. Simply enter the desired name in the **Look for** combo box and then press **Enter**.

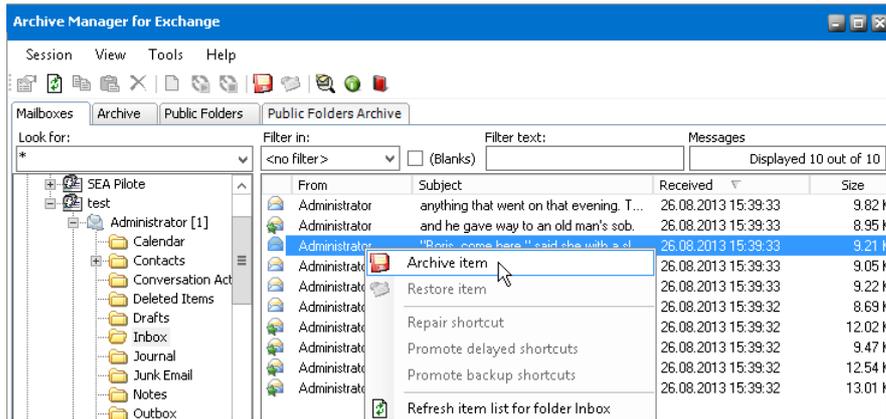
If you enter, for instance, the letter “a” and press **Enter**, a list of all users whose mailbox name contains the letter “a” will be displayed.

If you enter, for instance, the asterisk “\*” and press **Enter**, a list of all users will be displayed.



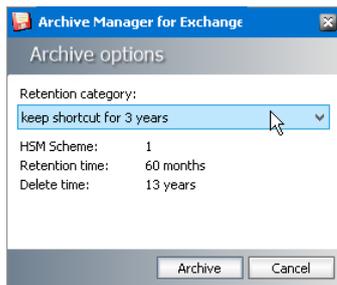
4. Double-click the required mailbox, e.g. Administrator, to expand its subfolders and then click on the desired one (e.g. *Inbox*).
5. Select the desired items in the right pane and then click on the **Archive** icon on the toolbar.

**i** | **NOTE:** You can also right-click the desired item and then, in the context menu, select **Archive item**.

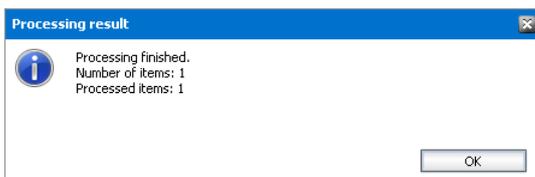


- The **Archive Options** window pops up before archiving. In the **Retention category** down-drop box you can choose the retention category for archiving. The basic characteristics for each category (HSM Schema, Retention time and Delete time) will appear below the down-drop box.

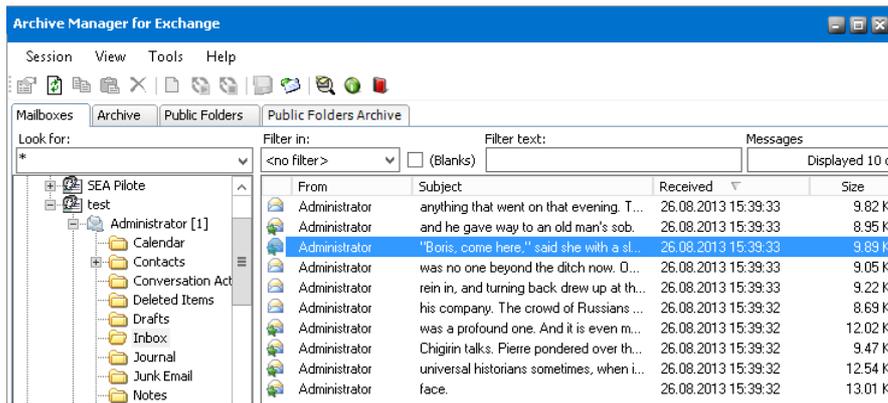
**i** | **NOTE:** If no selection is made in the **Archive Option** window, the retention category set as default (see the section “Retention tab”) will be used for the archived item.



- Click **Archive**.
- When archiving is complete, the **Processing result** window will be displayed. Click **OK**.



- The archived item will subsequently be displayed with a different icon (see below).



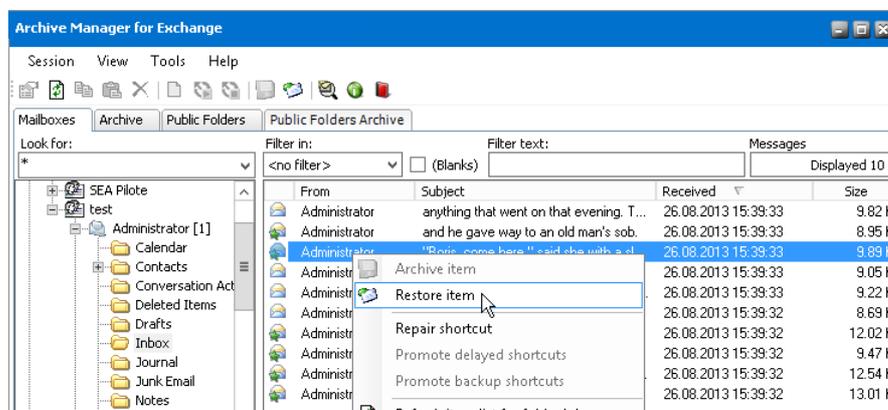
## How to restore an item

To restore individual items, use the **Mailboxes** tab in **Archive** view. To restore items in public folders, use the **Public folders** tab. For more information see the section [Public folders tab \(Archive view\)](#).

### To restore individual items:

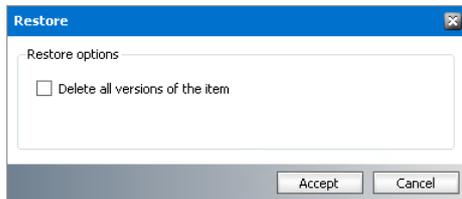
1. In **Archive** view click on the **Mailboxes** tab.
2. Find the desired mailbox in the left pane. You may use the **Look for** combo box for that purpose.
3. Double-click the desired mailbox to display its subfolders. Select the desired folder in the left pane. Its content will subsequently be displayed in the right pane. Only the left pane is active for switching between folders.
4. Right-click the desired archived item in the right pane and then, in the context menu, select **Restore** item.

**i** | **NOTE:** You can also select the desired archived item and then click on the **Restore** icon on the toolbar.



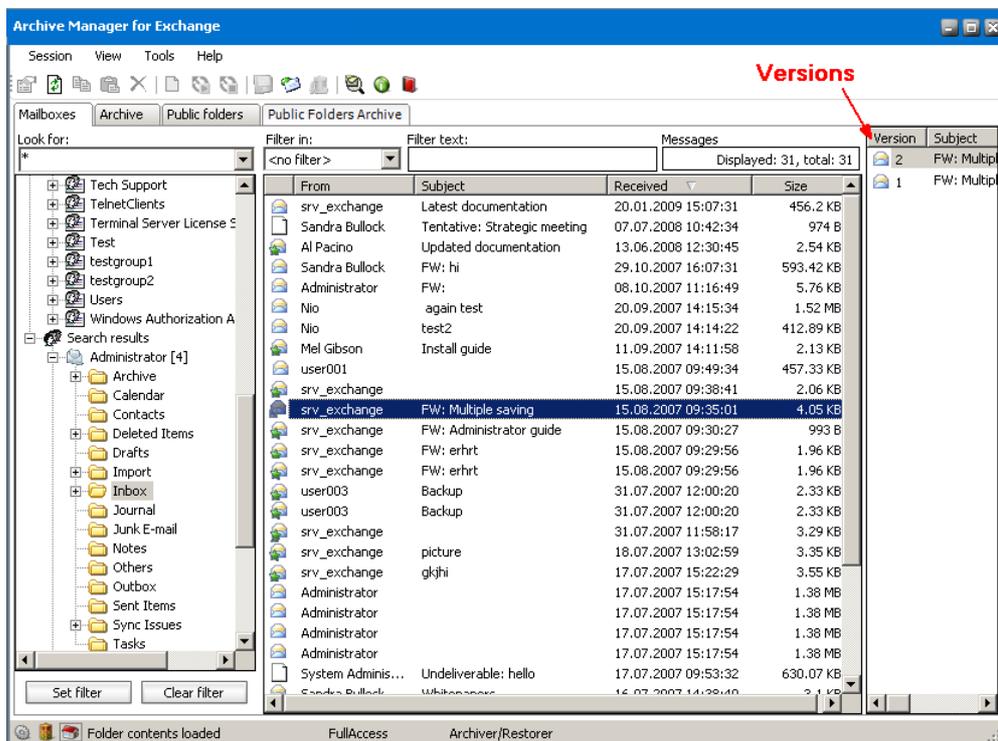
5. The **Restorer options** window opens. If you select the **Delete all versions of the document** check box then all versions of that document in the HSM store will be marked for deletion and

can be deleted with Delete Files job when their retention time elapses. If the check box is not selected, versions will be displayed as lost on the **Archive** tab of **Archive Manager for Exchange**. Click **Accept**.



- When restoring is complete, in the **Processing result** window click **OK**. The respective item will be restored and its icon will change, too.

**i** | **NOTE:** When restoring an item having several versions archived, those versions will be displayed in the right pane. You may choose to restore any of those versions.



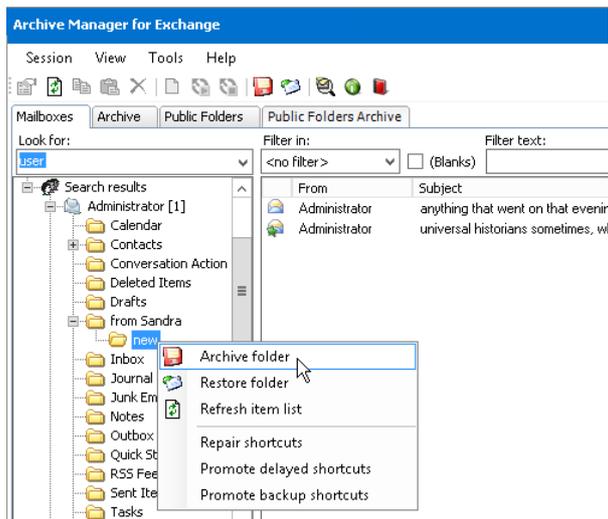
## How to manually archive all items in a folder/mailbox

You can archive the content of a folder or a whole mailbox manually. The process is similar to email archiving described in the section “How to manually archive an item”.

**i** | **NOTE:** Manual archiving of folder in public folders can be done on the **Public folders** tab in **Archive** view. See the section [Public folders tab \(Archive view\)](#).

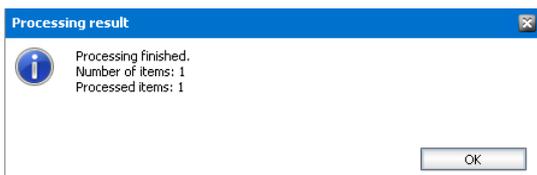
## To archive the entire contents of a folder or mailbox manually:

1. In **Archive** view, click on the **Mailboxes** tab.
2. Find the desired folder/mailbox in the left pane. You may use the **Look for** combo box.
3. Right-click the desired folder/mailbox and then, in the context menu, click **Archive folder/Archive mailbox**.



Folder archiving

4. In the **Retention category** down-drop box of the **Archive Options** window you can leave the default retention category or select another one. Click **Archive**.
5. When the process is finished, in the **Processing result** window click **OK**. All items in the folder/mailbox will be archived.



## How to restore all items in a folder/mailbox

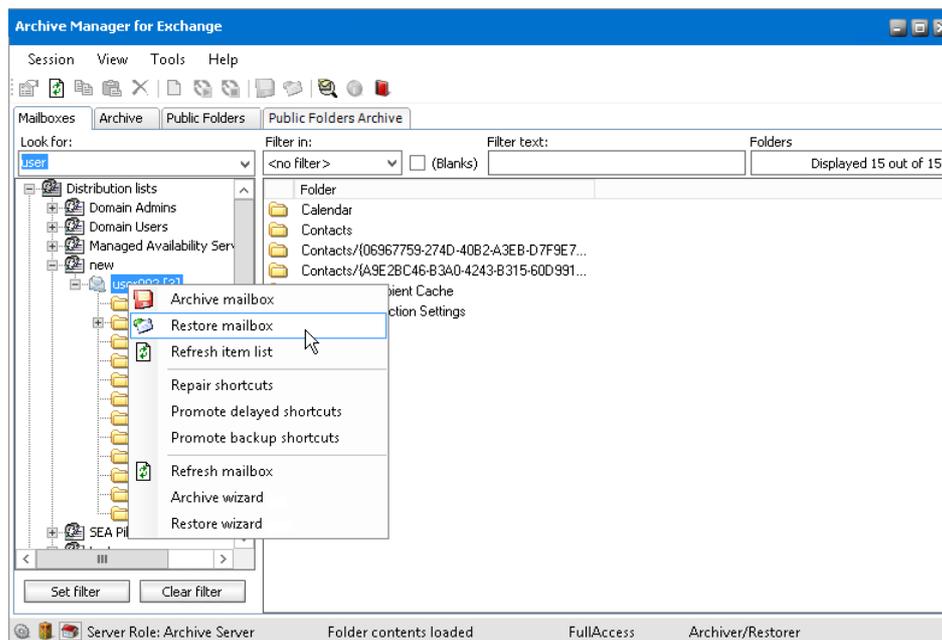
Restoring of all items in a folder/mailbox is done in **Archive** view on the **Mailboxes** tab. If you want to restore only certain type of messages (e.g. calendar items or tasks) for a mailbox, filter out the desired message classes via Wizard – see the section “Restore Wizard – How to restore only certain type of items”.

- i** **NOTE:** Restoring of all items in a public folder can be done on the **Public folders** tab in **Archive** view. See the section [Public folders tab \(Archive view\)](#).

## To restore all items in a folder/mailbox:

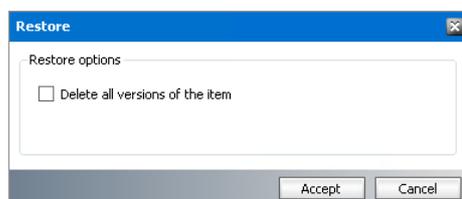
1. In **Archive** view, click on the **Mailboxes** tab.
2. Find the desired folder/mailbox in the left pane. You may use the **Look for** combo box for that purpose.
3. Right-click the desired folder/mailbox in the left pane and then, in the context menu, click **Restore folder/Restore mailbox**.

**i** | **NOTE:** You may also select the desired folder in the left pane and then click on the Restore icon on the toolbar.

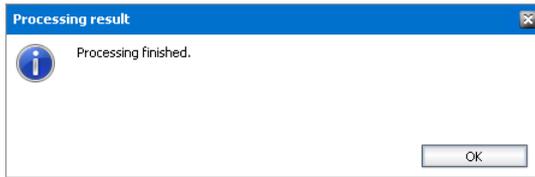


### Mailbox restoring

4. In the **Restorer options** window click **Accept**. If you select the **Delete all versions of the document** check box then all versions of items placed in that folder/mailbox will be marked for deletion in the HSM store and can be deleted with the Delete Files job when the retention time elapses. If the check box is not selected, versions will be displayed as lost on the **Archive tab** of Enterprise **Manager**.



5. When restoring is complete, in the **Processing result** window click **OK**. All items placed in that folder/mailbox will be restored.



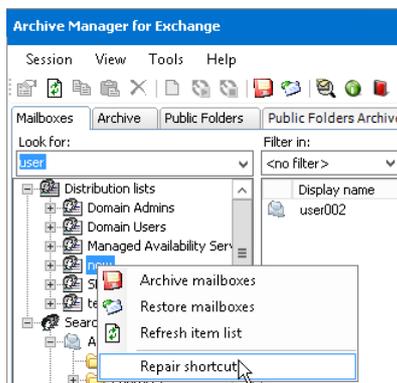
## Repairing shortcuts

### Usage:

- when some shortcuts are not working properly in Outlook
- when general shortcut settings on **Tools/Options/Archive settings/Shortcut** tab were changed and these new settings should be applied to all shortcuts of a group, mailbox or folder

### To repair shortcuts for a group/mailbox/folder:

1. In the **Archive** view click on the **Mailbox** tab.
2. Right-click the desired group/mailbox/folder in the left pane of the window and select **Repair shortcuts** option in the context menu.



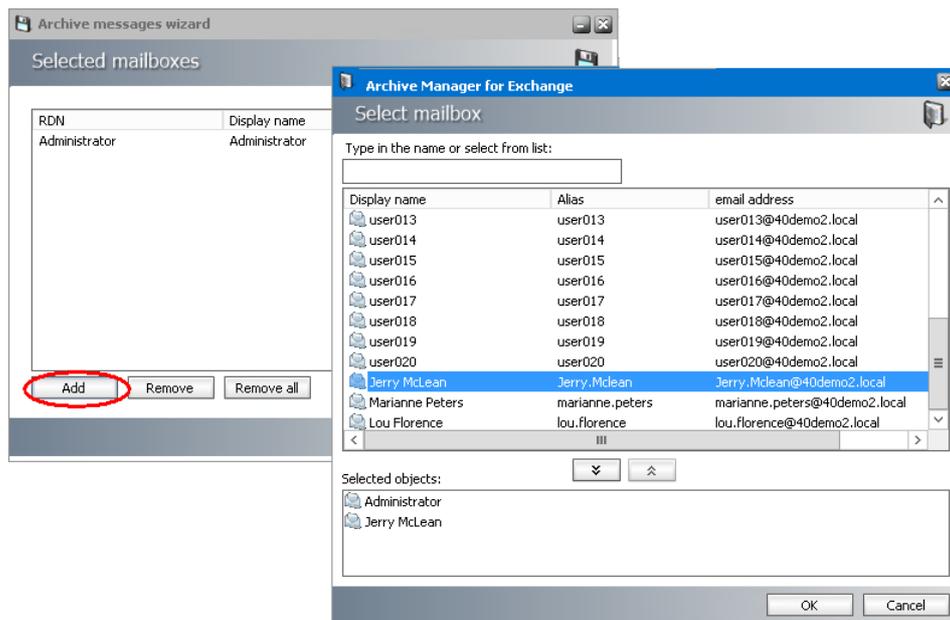
## Archive Wizard

Archive wizard accessible from the mailbox context menu on the Mailbox tab is a powerful tool for manual archiving. Administrator can archive several mailboxes at once and apply archiving filters regarding:

- message type
- mailbox folders

## To archive mailbox(es) with predefined settings:

1. In the **Archive** view click on the **Mailbox** tab.
2. Select one of the desired mailboxes in the left pane. You may use the **Look for** combo box for that purpose.
3. Right-click the mailbox and select **Archive wizard** from the context menu.
4. The **Archive messages wizard** opens. Use the **Add** button to add more mailboxes for which you want to archive messages. Click **Next**.

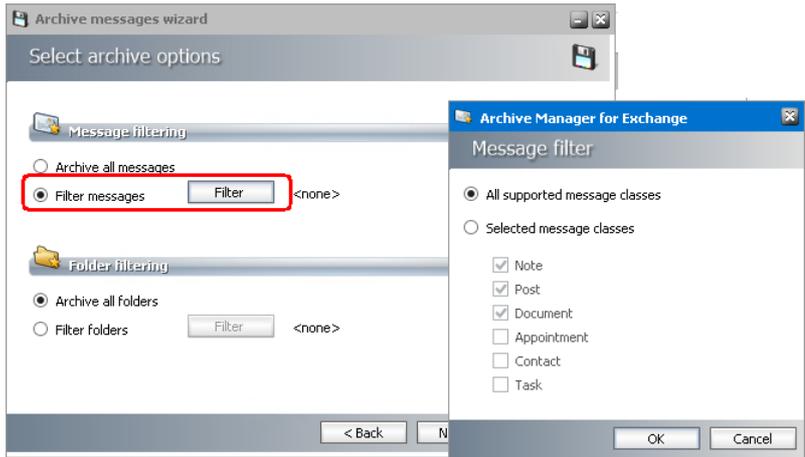


5. In the following dialog you can set filters regarding message classes and folders.
  - a. To archive *all messages* select **Archive all messages** switcher.

If you want to archive only certain message classes, select the **Filter messages** switcher and click the **Filter** button. In the pop-up message filter select to archive:

- **All supported message classes** (as set in Tools/Options/Message classes)
- **Selected message classes** and check those message classes which you want to archive.

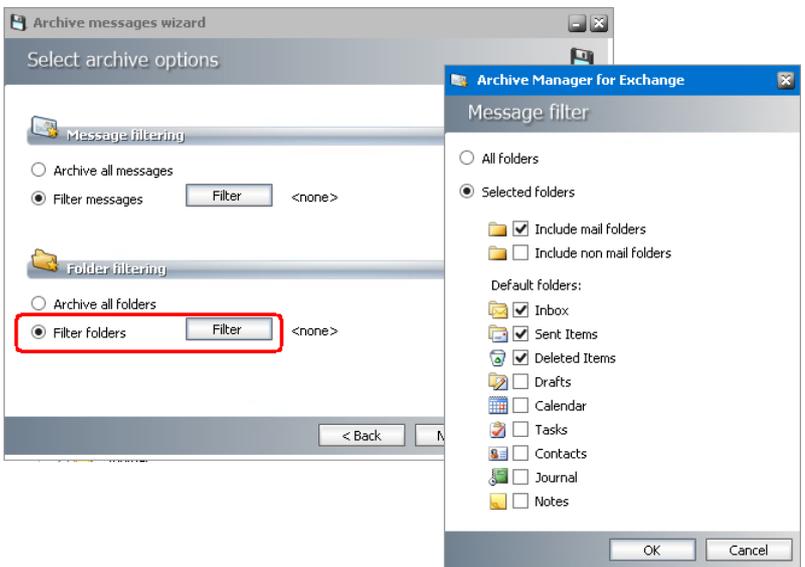
**i** | **NOTE:** The selected message classes must be set as supported message classes on the **Tools/Options/Message classes/Supported classes** tab. If they deactivated or not supported, they will not be archived.



b. To archive *all folders* select **Archive all folders** switcher.

If you want to archive messages only from certain mailbox folders, select the **Filter folders** switcher and click the respective **Filter** button. Specify your settings in the pop-up message filter. Click **Selected folders** switcher to choose folders to be archived:

- **Include mail folders** – all mail folders (Inbox, Sent Items, Drafts etc.) in the mailbox will be archived, including user defined mail folders
- **Include non mail folders** – all non mail folders will be archived (e.g. Tasks, Calendar etc.)
- And you can select also specific folders under **Default folders**



**Example:** In the above figure we have selected Include mail folders check box and the Calendar check box. As a result, all mail folders (Inbox, Sent Items etc.) of the given mailbox will be archived and Calendar folder will be archived, too.

6. Then select the retention category which you want to use for archiving. Click **Next**.
7. In the **Summary** window click Start. When the process finishes, click **Finish**.

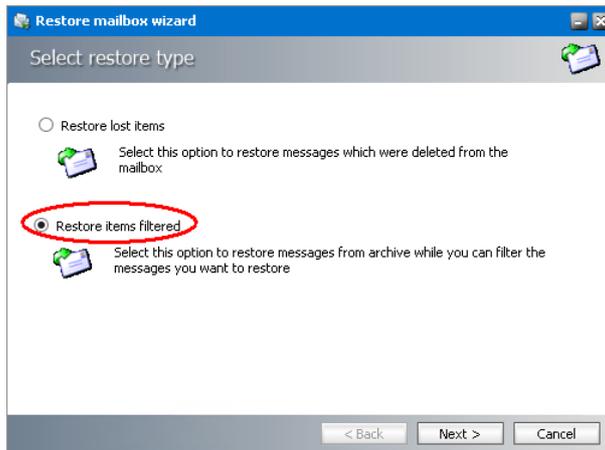
# Restore Wizard – How to restore only certain type of items

Restore wizard accessible from the mailbox context menu on the Mailbox tab significantly extends restoring options. Administrator can decide to restore:

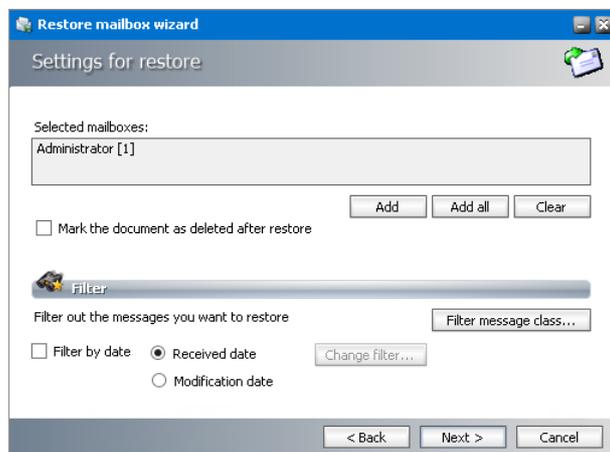
- filtered mailbox items that are filtered by type of item (e.g. calendar items, tasks etc.) or by receive date.
- lost items of several mailboxes at once (see the next section [Restore Wizard – How to restore lost items for several mailboxes](#)).

## To restore filtered mailbox items:

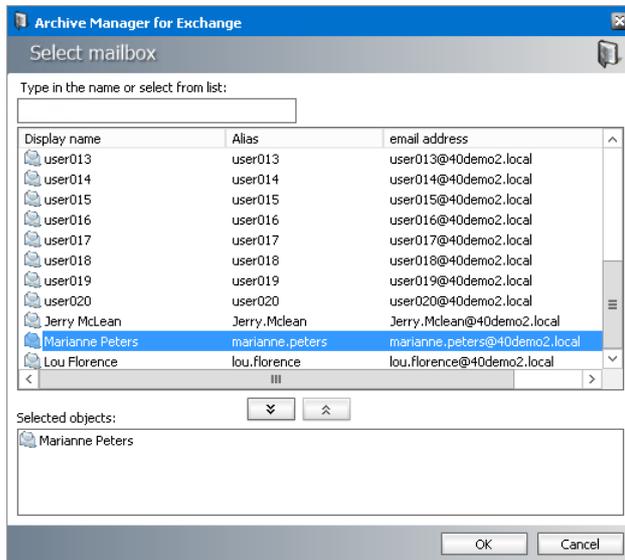
1. In the **Archive** view click on the **Mailboxes** tab.
2. Find one of the desired mailboxes in the left pane. You may use the **Look for** combo box for that purpose.
3. Right-click the mailbox and select **Restore wizard** from the context menu.
4. The **Restore mailbox** wizard opens. Choose the **Restore items filtered** and click Next.



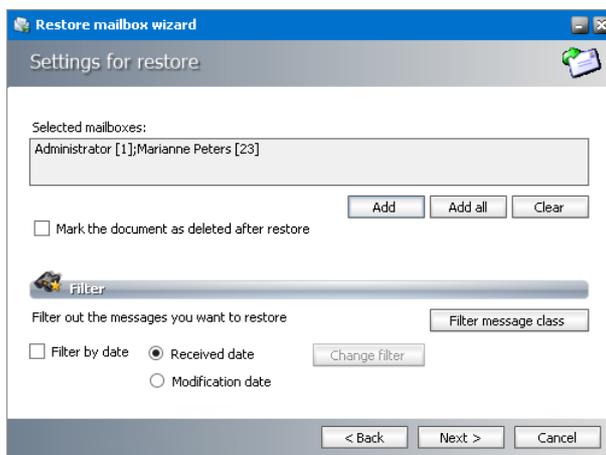
5. In the Settings window click **Add** button to add also other mailboxes.



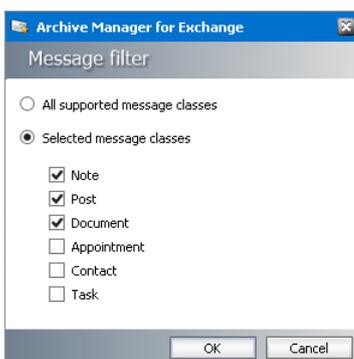
- The **Select mailbox** window opens. Enter the mailbox name in the upper text field or double-click all desired mailboxes from the list. Selected mailboxes will appear in the **Selected objects** field. Finish by clicking **OK**.



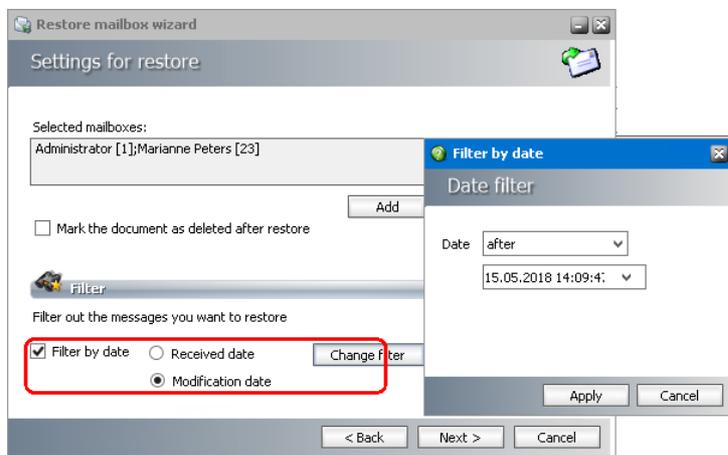
- Back in the **Settings** window all selected mailboxes will be displayed in the **Selected mailboxes** list. If you select **Delete document after restore** check box, restored messages will be marked for deletion in the archive. Now click the **Filter message class** button to choose the message classes to restore.



- The message filter pops-up. Select the message classes which you want to restore for the chosen mailboxes and click **OK**.



9. You can also filter messages by date when they were received or modified. To do so check the **Filter by date** check box. Then opt for **Receive date** or **Modification date** and click **Change filter**. Then in the pop-up window specify after/before/between option in the **Date** dropdown box. Finally enter the desired date and click **Apply**.



10. In the **Summary** window click **Finish**. When the processing has finished, you can check the result of processing. Next to every processed folder you can see the number of all folder items/number of items processed/number of errors, e.g. "Folder Inbox processed 125/19/0". If no items satisfy the entered criteria, no summary is displayed. Click **Close**.

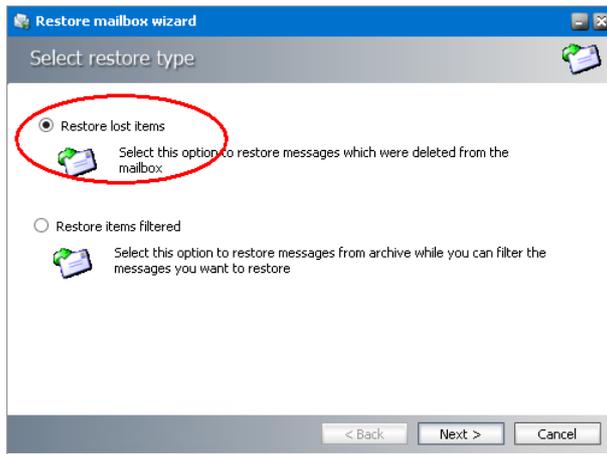
## Restore Wizard – How to restore lost items for several mailboxes

Users may have deleted the shortcut of an archived item simply by pressing the **SHIFT** key along with the **Delete** key on the keyboard or by clicking on the **Delete** icon on the Outlook toolbar.

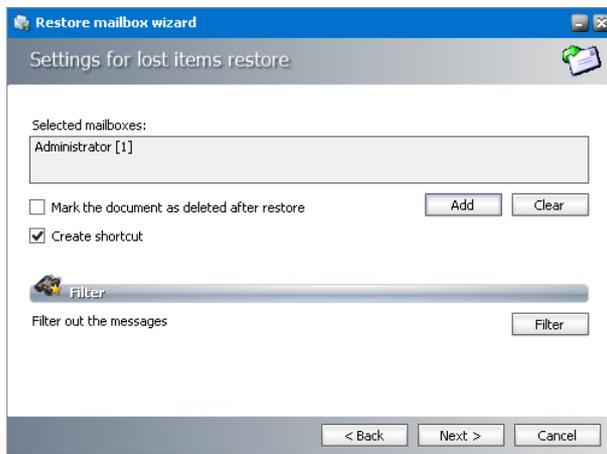
**i** **NOTE:** (not by clicking on the **Delete archived messages** icon and selecting **Delete from archive** option, which is an **Archive Manager Client AddIn** feature). In such cases those archived items are lost for the user. They cannot be reached by the user, but they still reside in the HSM store at least until their retention time expires. They can be recovered manually by the administrator only on the **Archive** tab and lost items from several mailboxes can be restored at once on the **Mailboxes** tab. (Such lost items have a blue icon on the **Archive** tab.

### To restore all lost items for several mailboxes:

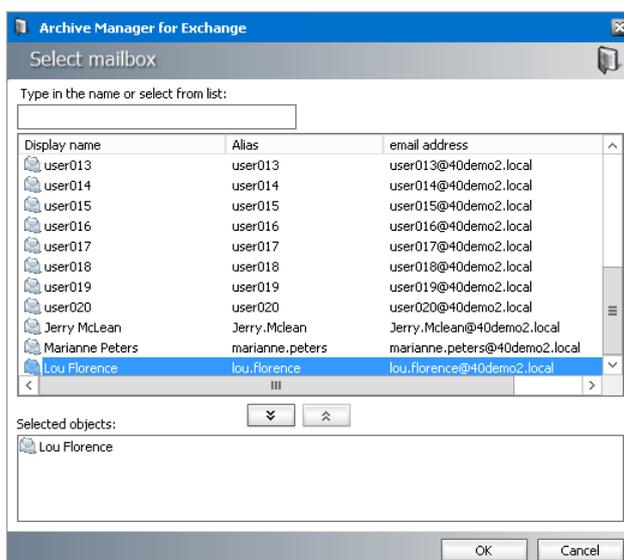
1. In the **Archive** view click on the **Mailboxes** tab.
2. Find one of the desired mailboxes in the left pane. You may use the **Look for** combo box for that purpose.
3. Right-click the mailbox and select **Wizard** from the context menu.
4. The **Mailbox wizard** opens. Choose the **Restore lost items** option and click **Next**.



5. In the **Settings** window click the **Add** button to add also other mailboxes for which you want to restore lost items.

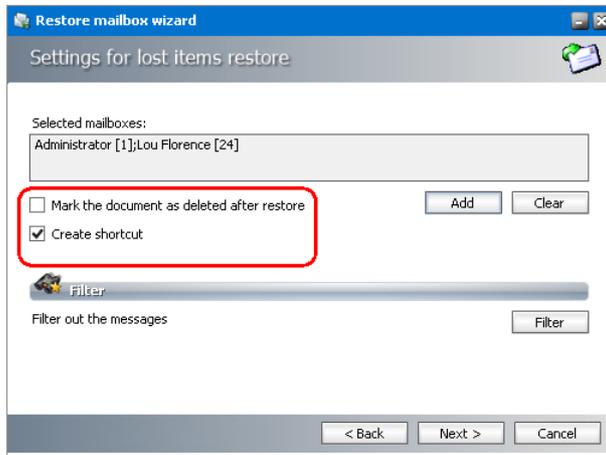


6. The **Select mailbox** window opens. Enter the mailbox name in the upper text field or double-click all desired mailboxes from the list. Selected mailboxes will appear in the **Selected objects** field. Finish by clicking **OK**.



7. Back in the **Settings** window all selected mailboxes will be displayed in the **Selected mailboxes** list. Now choose one of the following options:

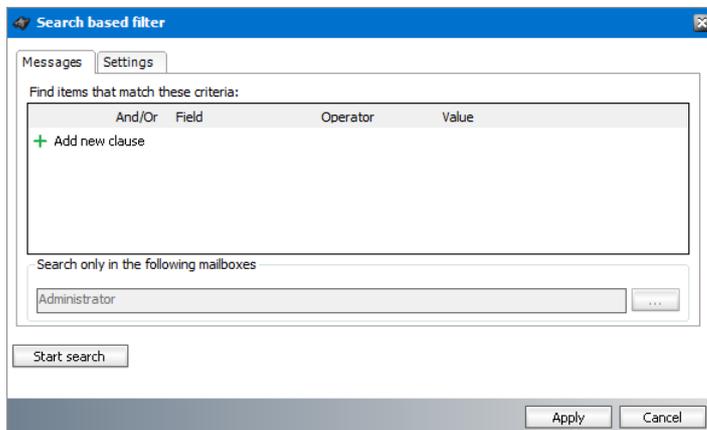
- a. **Mark the document as deleted after restore** check box – lost item(s) will be restored and displayed in the user’s mailbox as non-archived; all versions of the lost item(s) will be marked for deletion in the archive
- b. **Create shortcut** check box – shortcut of the item(s) will be displayed in the user’s mailbox and all versions will be accessible



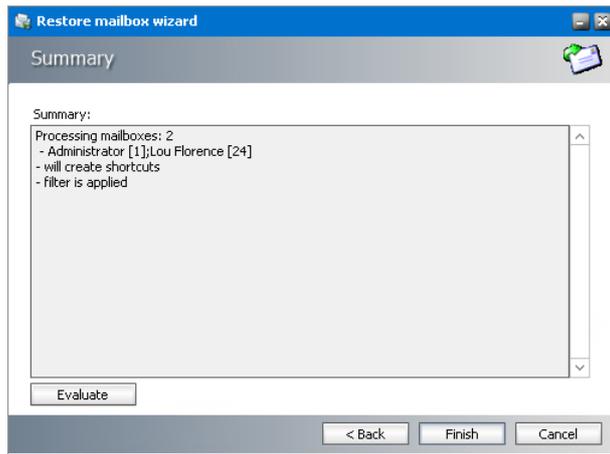
8. Maybe you do not want to restore all lost items in the selected mailboxes. Click **Filter** to set a filter for restoring. It is a search based filter. You can filter by sender, subject and also other parameters.

Specify your filter parameters and click **Start search** button in the Search based filter window. Click **Apply** if you want to restore the found item.

If you have finished, click **Next**.



9. In the **Summary** window read the summary. Click **Evaluation**, if you want to display the number of lost items to be processed. Then click **Finish**.

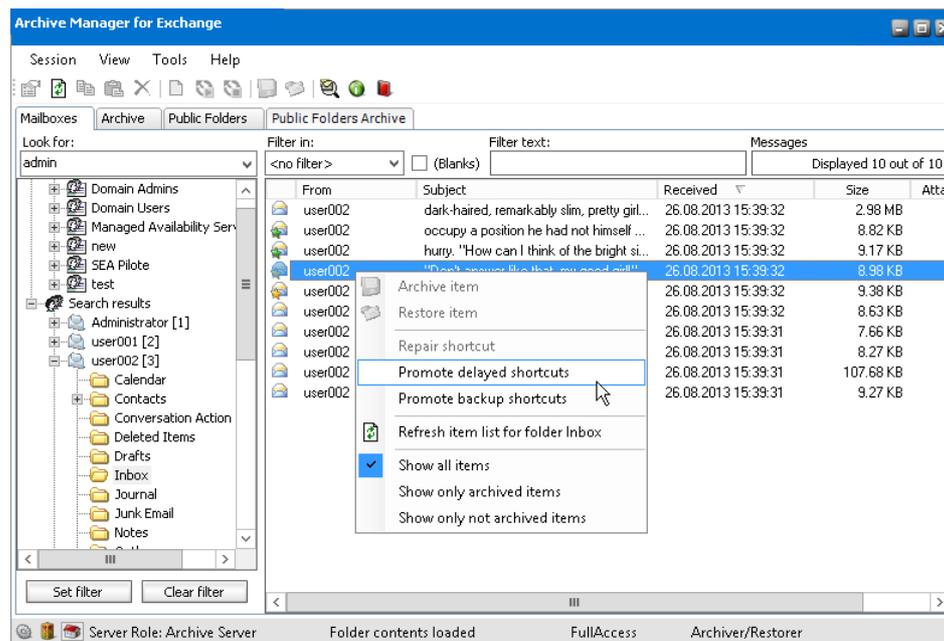


## How to manually create a shortcut for an archived item

In the Archive view on the Mailbox tab some items can be displayed with the following icon: 🕒 (delayed shortcut) or 🗄️ (backup shortcut). This indicates that the email has been archived but no shortcut was created for it. That happens when the email has been archived via retention category which keeps the original email or delay shortcut creation. (See “Retention tab”). It is possible to create a shortcut for such email on the **Mailbox** tab.

### To create a shortcut for an archived item:

1. In the **Archive** view click on the **Mailboxes** tab.
2. Find the desired mailbox in the left pane. You may use the **Look for** combo box for that purpose. Double-click it to unfold its subfolders.
3. Locate the desired item with delayed shortcut/backup shortcut icon in the right pane. Right-click it and then, in the context menu, click **Promote delayed shortcut/Promote backup shortcuts** as required.



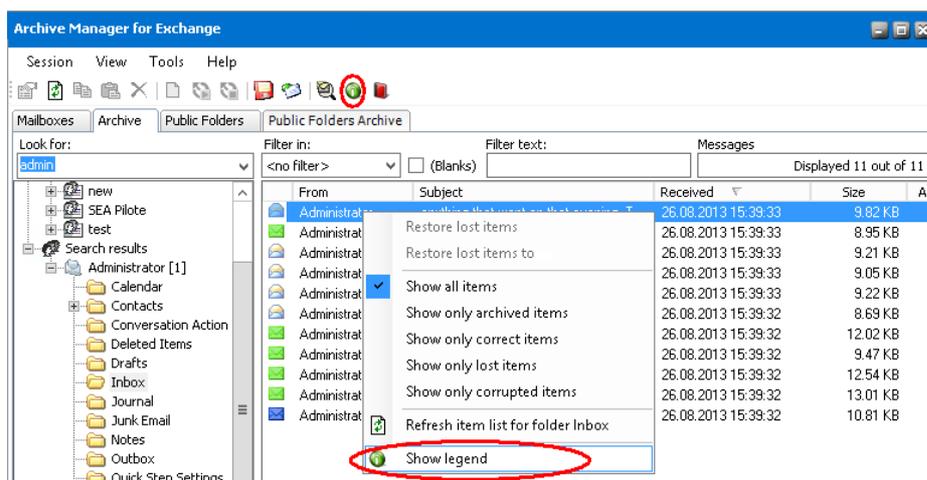
4. When the processing is over, in the **Processing result** window click **OK**.

## Archive tab

This tab is generally used

- to restore lost items  (they have no shortcut in MS Outlook, but they physically remain in the HSM store during their retention time)
- as a mailbox browser

**i** **NOTE:** On the **Archive** tab the administrator can browse through mailboxes and their folders. For each folder there is a list of all its items displayed in the right pane of the window. Different colors of the icon represent different status of the item. You can open the legend for icons when you right-click an item in the right pane and select **Show legend** from the context menu or you can click the **Show legend** icon on the toolbar (  ). The **Legend** window with icon explanation appears.



## Some basic icons:

🔵 Blue indicates that the respective archived items are lost, i.e. they remain in the HSM store at least during their retention time but they have no shortcut in Outlook. User cannot reach them. Such lost items can be recovered manually only by the administrator on this tab or on the Mailboxes tab (see the section “How to restore lost items for several mailboxes”).

🟢 Green indicates that the respective item is archived and has a shortcut in Outlook. It can be restored.

🔴 Red items are corrupted, i.e. there is a shortcut to them, however the content has been corrupted and therefore that item cannot be restored.

🟡 Yellow indicates that the shortcut in the mailbox folder belongs to a different user.

## Restoring lost items

Users may have deleted the shortcut of an archived item simply by pressing the **SHIFT** key along with the **Delete** key on the keyboard or by clicking on the **Delete** icon on the Outlook toolbar and not by clicking on the **Delete archived messages** icon and selecting **Delete from archive option**, which is an **Archive Manager Client AddIn** feature.

In such cases those archived items are lost for the user. They cannot be reached by the user, but they still reside in the HSM store at least until their retention time expires. They can be recovered manually by the administrator only. Such lost items have a blue icon on the **Archive** tab.

On this tab the administrator can restore:

- one lost item
- all lost items of a folder
- all lost items of a mailbox

- (restoring of lost items for more mailboxes at once can be done on the Mailbox tab – see the section “How to restore lost items for several mailboxes”)

**i** | **NOTE:** In all three cases mentioned above the administrator can restore also to a folder or a mailbox different from the original one (see [Lost items restoring to a specific folder](#) ).

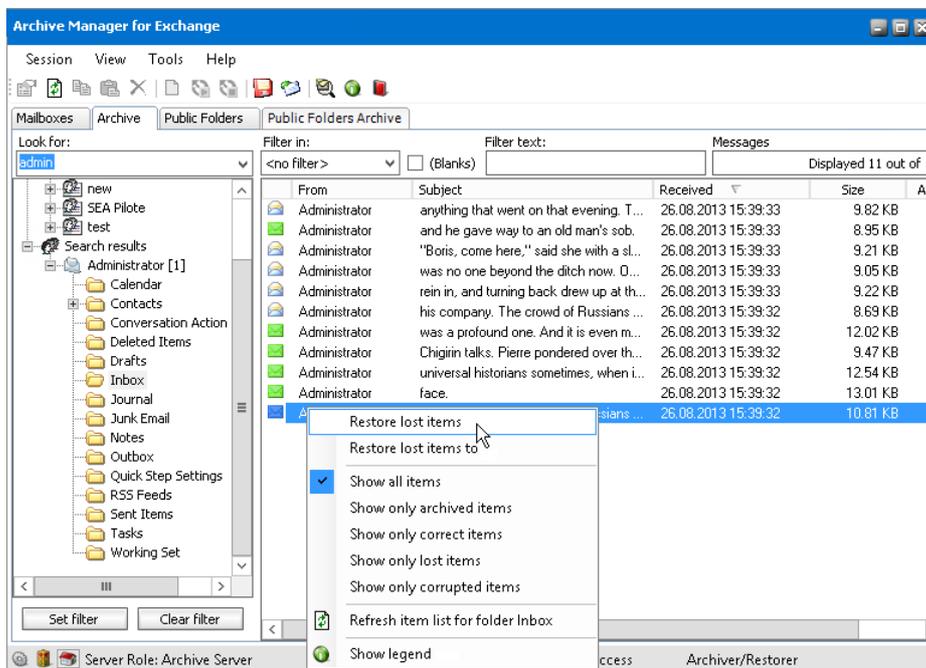
## To restore one or more lost items:

1. Click **View** on the **Archive Manager for Exchange** menu bar. Select **Archive**. Then switch to the **Archive** tab.
2. In the left pane find the desired user whose lost item(s) you want to restore. You can use the **Look for** combo box where you do not need to enter an exact name of the user.
3. To restore ONE LOST ITEM, open the folder in which the shortcut to this item was originally kept. A list of all items of the folder will be displayed in the right pane. Right-click the desired lost item (blue icon). In the context menu select **Restore lost item** option.

To restore ALL LOST ITEMS OF A FOLDER right-click that folder in the left pane. In the context menu select **Restore lost folder items** option.

To restore ALL LOST ITEMS OF A MAILBOX right-click that mailbox in the left pane. In the context menu select **Restore lost mailbox items** option.

**i** | **NOTE:** If you want to display lost items only, right-click in the right pane and, in the context menu, click **Show only lost items**.

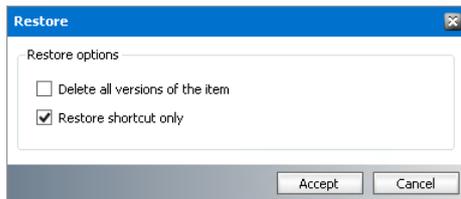


### Restoring a lost item

4. In the pop-up **Restore options** window choose between two options:

- a. **Delete all versions of the document** check box – all versions of the lost item(s) will be marked for deletion in the archive, just the latest one(s) will be displayed in the user’s mailbox as non-archived
- b. **Restore shortcut only** check box – shortcut of the item(s) will be displayed in the user’s mailbox and all versions will be accessible

**i** | **NOTE:** If none of the options is checked, email is returned to the user’s mailbox as non-archived and its versions, if any, are displayed as *lost* in **Archive Manager for Exchange**.



5. Click **Accept**. The respective archived item will be restored to the folder its shortcut had been deleted from.
6. When restoring is over, in the **Processing result** window click **OK**.

## Restoring lost items to a specific folder

Using this option lost items can be restored to a mailbox different from the original one. However, when only shortcut is restored (i.e. not the original message) to a different mailbox, the mailbox user is not the owner of such item. It means that the user will not be able to delete or modify the archived item using that shortcut. The user will be able to restore the shortcut and perform the changes but cannot control the archived counterpart. On the Archive tab such item is displayed with a yellow icon: .

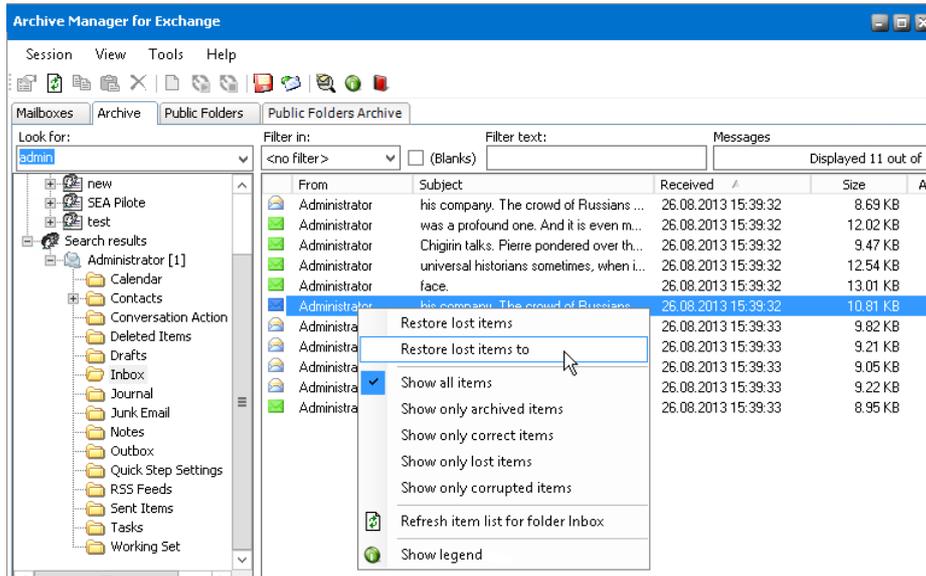
### To restore lost item(s) to a folder or a mailbox different from the original one:

1. Click **View** on the **Enterprise Manager** menu bar. Select **Archive**. Then switch to the **Archive** tab.
2. In the left pane find the desired user whose lost item(s) you want to restore. You can use the **Look for** combo box where you do not need to enter an exact name of the user.
3. To restore ONE LOST ITEM, open the folder in which the shortcut to this item was originally residing. A list of all items of the folder will be displayed in the right pane. Right-click the desired lost item (blue icon). In the context menu select **Restore lost item to** option.

To restore ALL LOST ITEMS OF A FOLDER right-click that folder in the left pane. In the context menu select **Restore lost folder items to** option.

To restore ALL LOST ITEMS OF A MAILBOX right-click that mailbox in the left pane. In the context menu select **Restore lost mailbox items to** option.

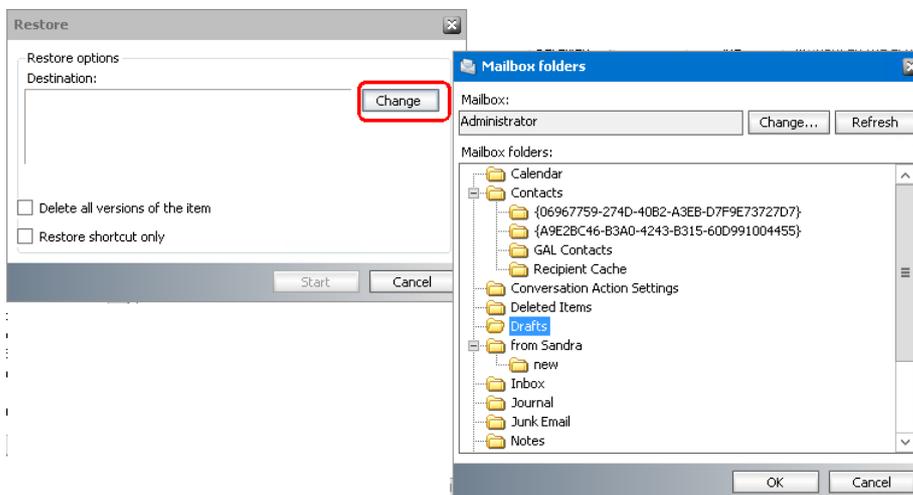
**i** | **NOTE:** If you want to display lost items only, right-click in the right pane and, in the context menu, click **Show only lost items**.



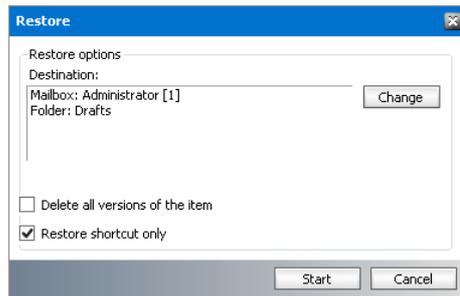
4. In the pop-up **Restore lost items** window choose between two options:
  - a. **Delete all versions of the document** check box – all versions of the respective lost item(s) will be marked for deletion in the archive, just the latest one(s) will be displayed in the user’s mailbox as non-archived.
  - b. **Restore shortcut only** check box – shortcut of the respective item(s) will be displayed in the user’s mailbox and all versions will be accessible.

**i** | **NOTE:** If none of the options is checked, email is returned to the user’s mailbox as non-archived and its versions, if any, are displayed as *lost* in the **Enterprise Manager**.

5. Then click the **Change** button to specify the destination where the item(s) will be restored.
6. In the **Mailbox folders** pop-up window define a mailbox (using the **Change** button) and a folder of that mailbox where the lost item(s) should be restored. If the folders are not displayed, click **Refresh**. Click **OK**.

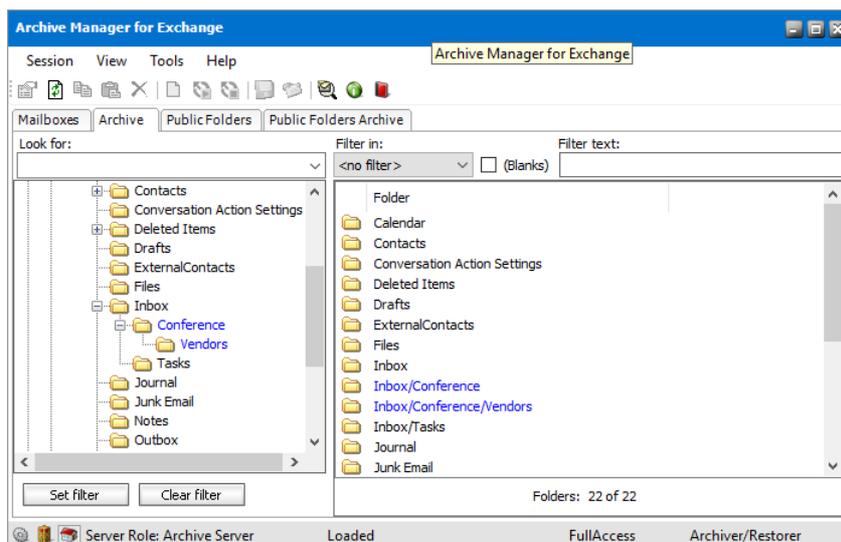


7. Back in the **Restore lost items** window the defined folder is displayed in the **Destination** field. Click **Start**. Then **OK**.



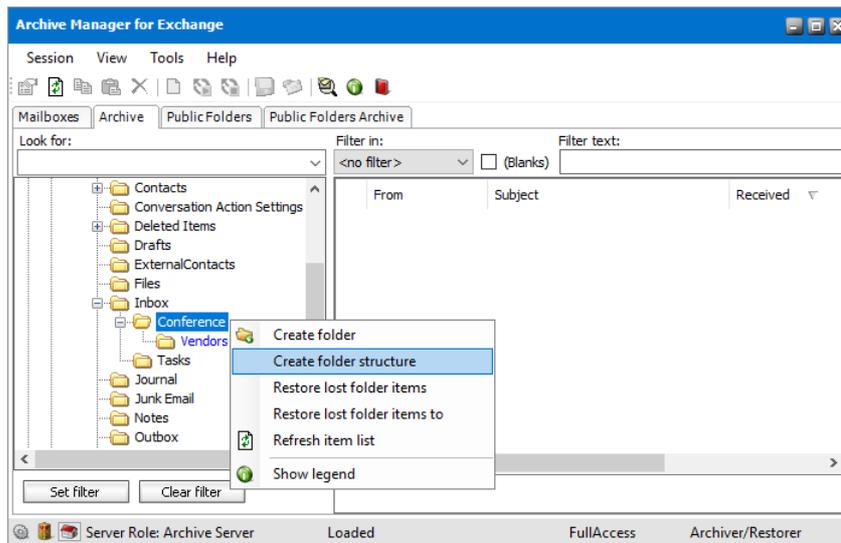
## Restoring mailbox folders

When mailbox folders or sub-folders with archived items are deleted, the information about the folder structure is available to Archive Manager. The entire folder structure can be restored. For example, assume that the sub-folder tree *Inbox > Conference > Vendors* was deleted. Deleted folder names appear in blue color.



### To restore the folder structure

1. Select the root node of the deleted folder structure.
2. Right click and select **Create folder structure** from the context menu. The folder structure will be restored along with any archived items in those folders and the folder names will be displayed in normal black color.



## Public Folders tab

On this tab one can archive and restore items of a Public Folders manually. Restore wizard for lost item restoring is also accessible in the context menu (see the “Restore wizard” section). However, first we describe here the steps which have to be completed so that the users can archive in their Outlook Public Folders.

For manual archiving of the items directly in Outlook public folders you need to do some specific steps beforehand:

- First (and this is very important!), owner rights must be assigned for the respective public folder in MS Outlook. (See the section [How to manually archive an item in an Outlook public folder](#), points 1 through 9.)
- Then one additional simple step needs to be taken (we will describe it in detail below). (See the section [How to manually archive an item in an Outlook public folder](#), point 10.)

**i** **NOTE:** The process described below needs to be performed for every public folder whose items you plan to archive/restore. The process needs to be done **ONLY ONCE** for each such folder.

After going through the process you can archive and restore items in the MS Outlook using **Archive Manager Client Addin** as described in this chapter or on the **Public Folders** tab using toolbar icons or the context menu (as on the **Mailbox** tab).

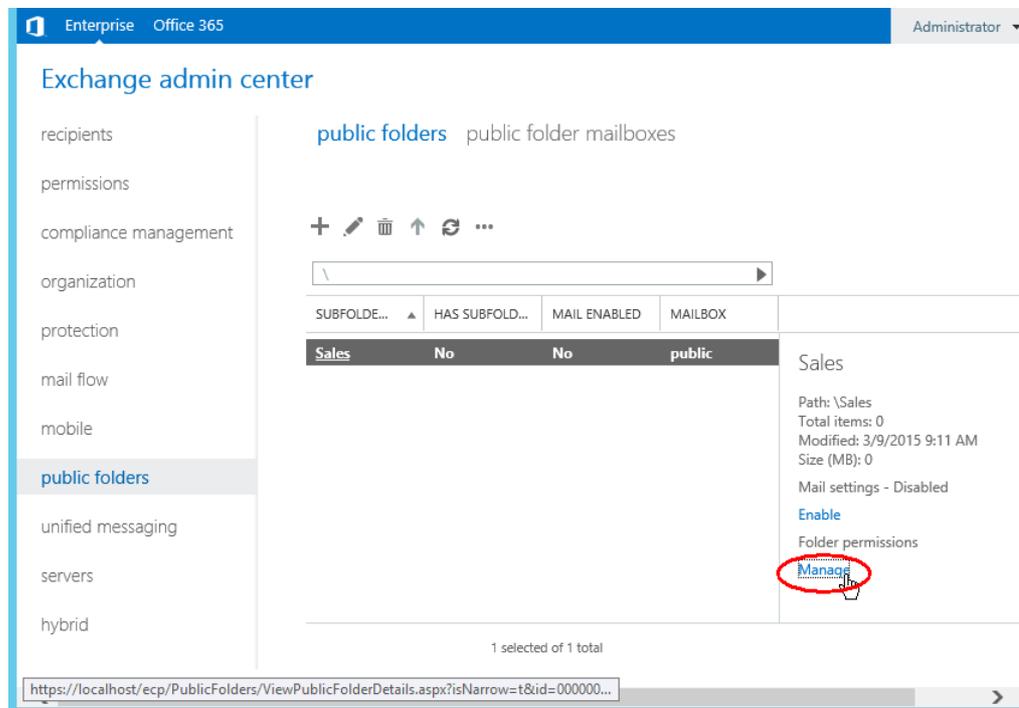
On this tab you are able to see just those public folders for which the user specified on the **Tools/Options/Server settings/Public Folders** tab under “Public Folders access” has the owner rights. To see all public folders you have to set the super-user (in our case *srv\_Microsoft Exchange*) under “Public Folders access” on a **Tools/Options/Server settings/Public Folders** tab.

# How to manually archive an item in an Outlook public folder

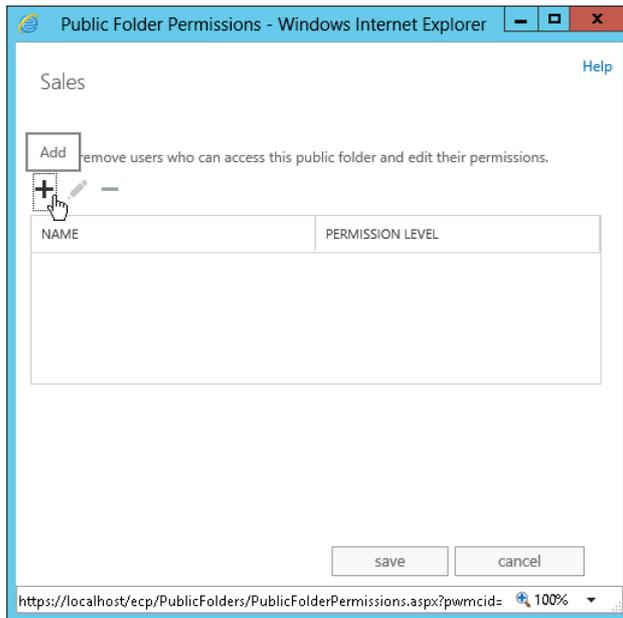
Let us go through the whole process for Microsoft Exchange Server 2013 to 2019

## To archive items in an Microsoft Exchange Server 2013 - 2019 public folder manually:

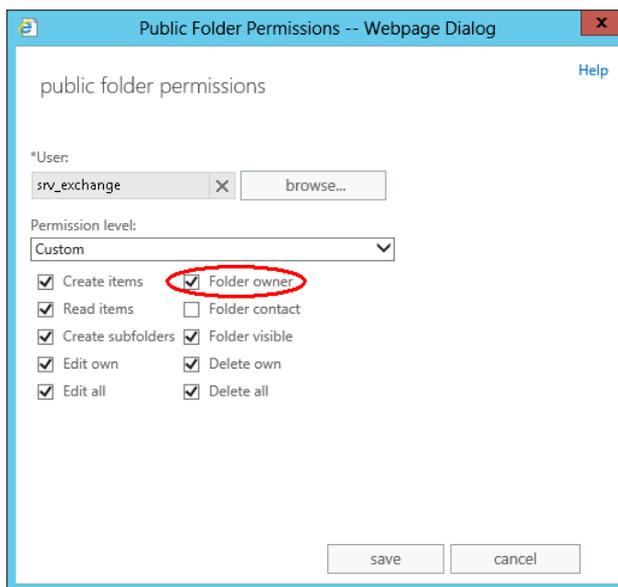
1. Open Microsoft Exchange Administrator Center.
2. Go to **Public Folders/Public Folders**.
3. Select the desired Public Folder from the list and click **Manage** under **Folder Permissions** on the right.



4. In the pop-up window click **Add** icon (the plus sign).



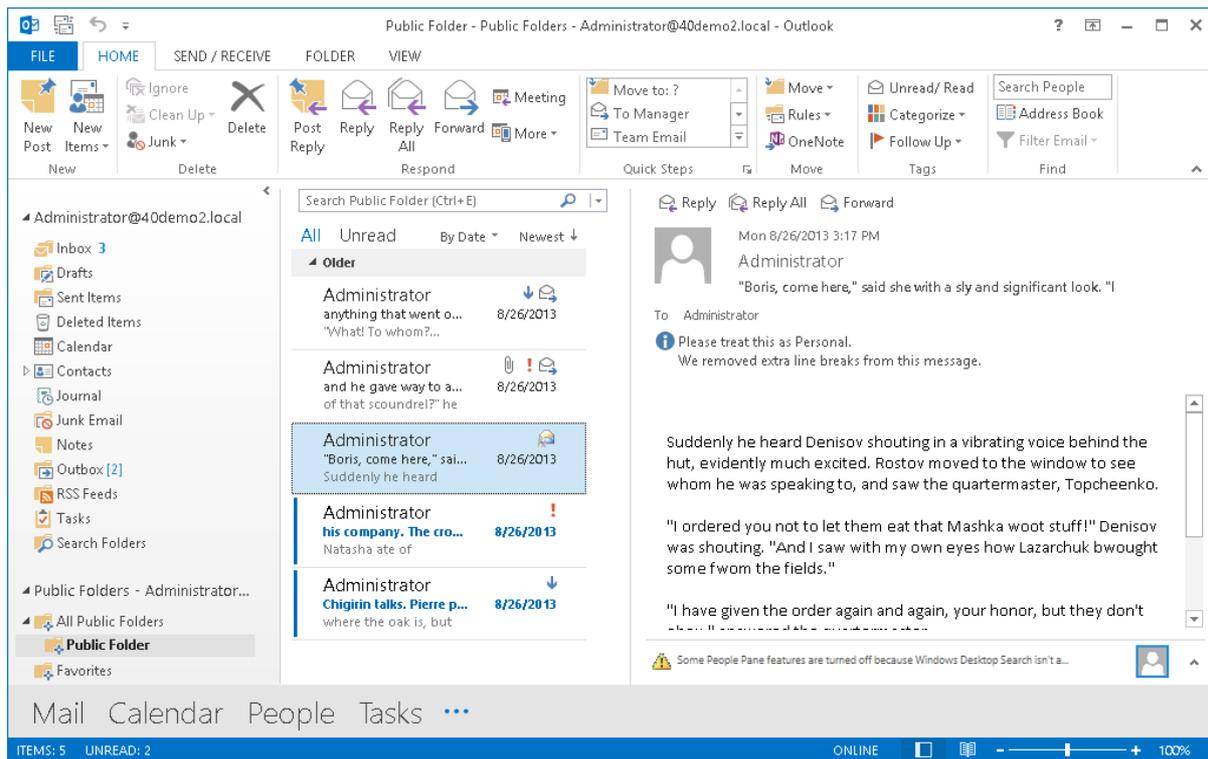
5. Browse for the super-user (srv\_Microsoft Exchange, see “Installation Guide for MS Microsoft Exchange Server”). Make sure to check **Folder owner** option.



6. Click **Save** and **Save** again to confirm.
7. Now copy any archived email into that public folder: select an archived email and press **CTRL** while dragging that email into that public folder. Now you may try to restore it. Only for this mail you will get a warning message saying “Failed to restore 1 item”. For all other items placed in that folder archiving (as well as restoring) will work properly.

# How to restore archived items of an Outlook public folder

Restoring of archived items residing in a public folder is done easily. Let's say you have prepared a public folder for archiving (see the process described in the section [How to manually archive an item in an Outlook public folder](#)) and have already archived items there. Now you may restore any archived item by simply selecting it and clicking on the **Restore** icon, or by clicking **Restore** in the **Archive Manager for Exchange**.



## Restore wizard

Now get back to Archive Manager for Exchange itself. Restore wizard accessible form the context menu on the **Archive View/Public Folders** tab allows administrator to restore all lost items in Public Folders in a few simple steps.

### To restore all lost items in a public folder:

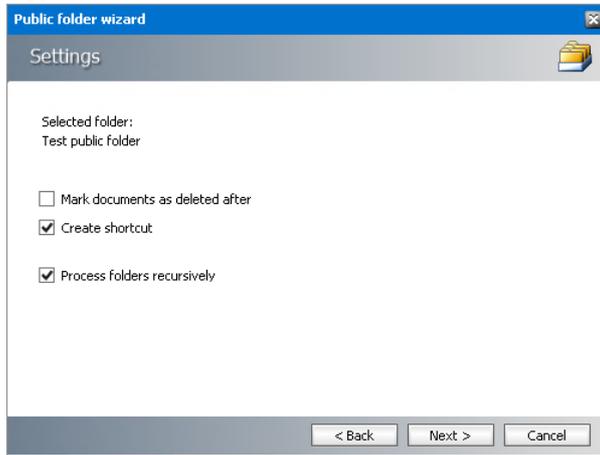
1. In the **Archive** view click on the **Public Folders** tab.
2. Right-click the desired public folder and from the context menu click **Wizard**.
3. In the pop-up dialog click **Next**.
4. Now specify the restore behavior. Either:

**Mark documents as deleted after** – if checked, lost items will be restored to public folder and they will be marked for deletion in the archive

or

**Create shortcut** – if checked, only shortcuts will be created for the lost items in the public folder

If necessary, check the **Process folders recursively** check box. Then click **Next**.



5. The **Summary** dialog displays your settings. You can check the number of items to be processed by clicking the **Evaluate** button. To process the items click **Finish**.

## Public Folders Archive tab

This tab is generally used

- to restore lost items  in public folders (they have no shortcut in MS Outlook, but they physically remain in the HSM store during their retention time)
- as a public folder archive browser

**i** **NOTE:** On the **Public Folder Archive** tab the administrator can browse through folders and sub-folders. For each folder there is a list of all its items displayed in the right pane of the window. Different colors of the icon represent different status of the item. You can open the legend for icons when you right-click an item in the right pane and select **Show legend** from the context menu or you can click the **Show legend** icon on the toolbar (). The **Legend** window with icon explanation appears.

### Some basic icons:

 Blue indicates that the respective archived items are lost, i.e. they remain in the HSM store at least during their retention time but they have no shortcut in Outlook. User cannot reach them. Such lost items can be recovered manually only by the administrator on this tab or on the Public Folder tab (see the section [How to restore archived items of an Outlook public folder](#)).

🟢 Green indicates that the respective item is archived and has a shortcut in Outlook. It can be restored.

🔴 Red items are corrupted, i.e. there is a shortcut to them, however the content has been corrupted and therefore that item cannot be restored.

🟡 Yellow indicates that the shortcut in the mailbox folder belongs to a different user.

## Restoring lost items

Users may have deleted the shortcut of an archived item simply by pressing the **SHIFT** key along with the **Delete** key on the keyboard or by clicking on the **Delete** icon on the Outlook toolbar and not by clicking on the **Delete archived messages** icon and selecting **Delete from archive option**, which is an **Archive Manager Client AddIn** feature.

In such cases those archived items are lost for the user. They cannot be reached by the user, but they still reside in the HSM store at least until their retention time expires. They can be recovered manually by the administrator only. Such lost items have a blue icon on the **Public Folder Archive** tab.

On this tab the administrator can restore:

- one lost item
- all lost items of a folder
- all lost items of a sub-folder

### To restore one or more lost items:

1. Click **View** on the **Archive Manager for Exchange** menu bar. Select **Archive**. Then switch to the **Public Folder Archive** tab.
2. In the left pane find the desired public folder whose lost item(s) you want to restore.
3. To restore ONE LOST ITEM, open the public folder in which the shortcut to this item was originally kept. A list of all items of the public folder will be displayed in the right pane. Right-click the desired lost item (blue icon). In the context menu select **Restore lost item** option.

To restore ALL LOST ITEMS OF A PUBLIC FOLDER right-click that folder in the left pane. In the context menu select **Restore lost folder** items option.

**i** | **NOTE:** If you want to display lost items only, right-click in the right pane and, in the context menu, click **Show only lost items**.

4. In the pop-up **Restore options** window choose between two options:
  - a. **Delete all versions of the document** check box – all versions of the lost item(s) will be marked for deletion in the archive, just the latest one(s) will be displayed in the public folder as non-archived

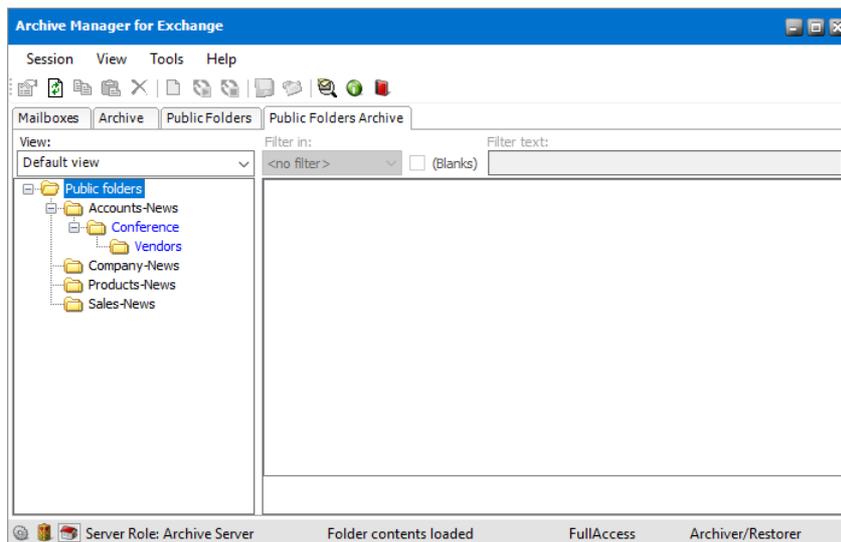
- b. **Restore shortcut only** check box – shortcut of the item(s) will be displayed in the public folder and all versions will be accessible

**i** | **NOTE:** If none of the options is checked, email is returned to the public folder as non-archived and its versions, if any, are displayed as *lost* in **Archive Manager for Exchange**.

5. Click **Accept**. The respective archived item will be restored to the folder its shortcut had been deleted from.
6. When restoring is over, in the **Processing result** window click **OK**.

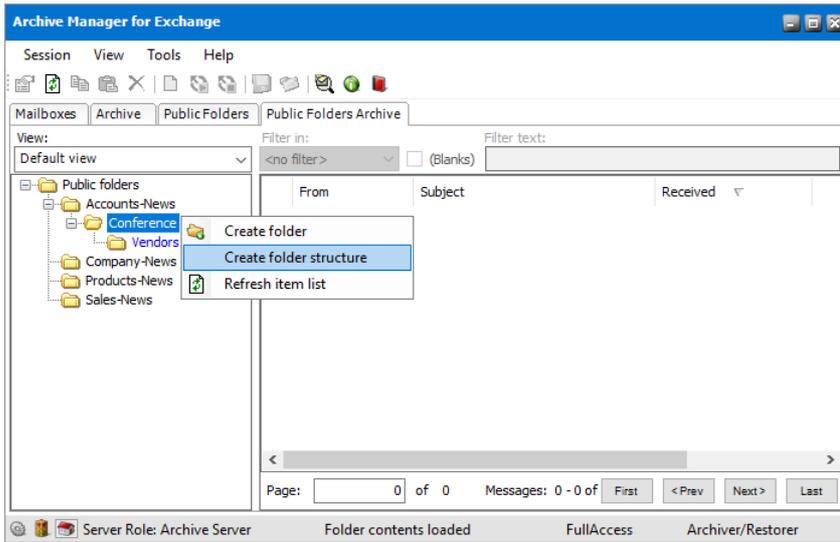
## Restoring public folders

When public folders or sub-folders with archived items are deleted, the information about the folder structure is available to Archive Manager. The entire folder structure can be restored. For example, the image below indicates that the sub-folder tree *Conference > Vendors* was deleted. Deleted folder names appear in **blue** color.



### To restore the folder structure

1. Select the root node of the deleted folder structure.
2. Right click and select Create folder structure. The folder structure will be restored along with any archived items in those folders and the folder names will be displayed in normal black color.



# Post Processing

Post Processing is a service which allows running customer specific tasks over archived emails and their attachments across selected mailboxes. So those clients who are using other software programs and wish to process within those software programs archived emails and their attachments may do so via the Post Processing service.

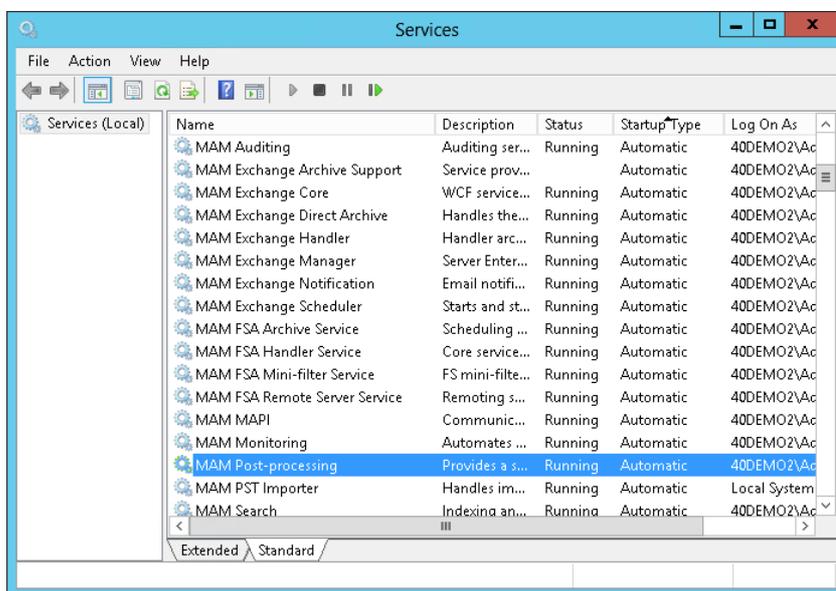
## How to use post processing

To use the Post Processing service, the user must use the Archive Manager Configuration tool.

### Upon receiving a plugin, take the following steps:

1. Make sure that the Post Processing service has started.

**i** **NOTE:** Without the Post Processing service started any plugin – even the active ones – will not run and therefore no post processing will be performed.



2. Add the plugin to the Post Processing for Exchange scope.
3. Select all mailboxes to which post processing is to be applied.
4. Define the initial bookmark date for the plugin if necessary.



**NOTE:** A bookmark indicates the date and time where the indexing process has reached. All emails and their attachments that are archived after this bookmark date will be processed unless they have already been indexed. There can be several plugins running in parallel, each with a different bookmark date. However, do not start post processing service on multiple servers for the same database. Running the post processing service on multiple servers is not recommended since that can cause conflicts in bookmarking. The same database should not be indexed by more than one post processing service.

The Post Processing service manages (starts and stops) the plugins at regular intervals. Advanced Post Processing settings can be configured after clicking the **General Settings** tab on the **Post processing** tab.

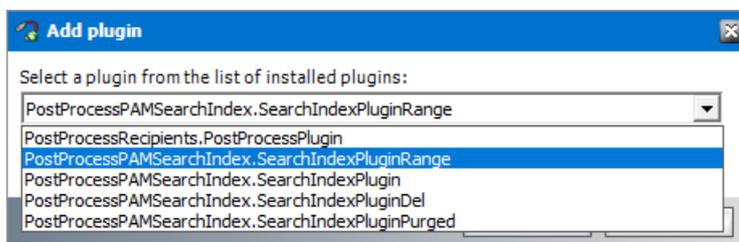
Each plugin is loaded by default with the date and time (initial bookmark date). This means that the plugin processes emails and their attachments having been archived after this initial bookmark date. If post processing should begin from some other bookmark date, then make sure to reset the initial bookmark date.

Enhance your ArchiveWeb search by a new search option. Besides Subject and From text boxes in the Exchange Archive search a brand new searching option can be added to the search query – **To** field. In this way user can search for items sent to specific recipient.

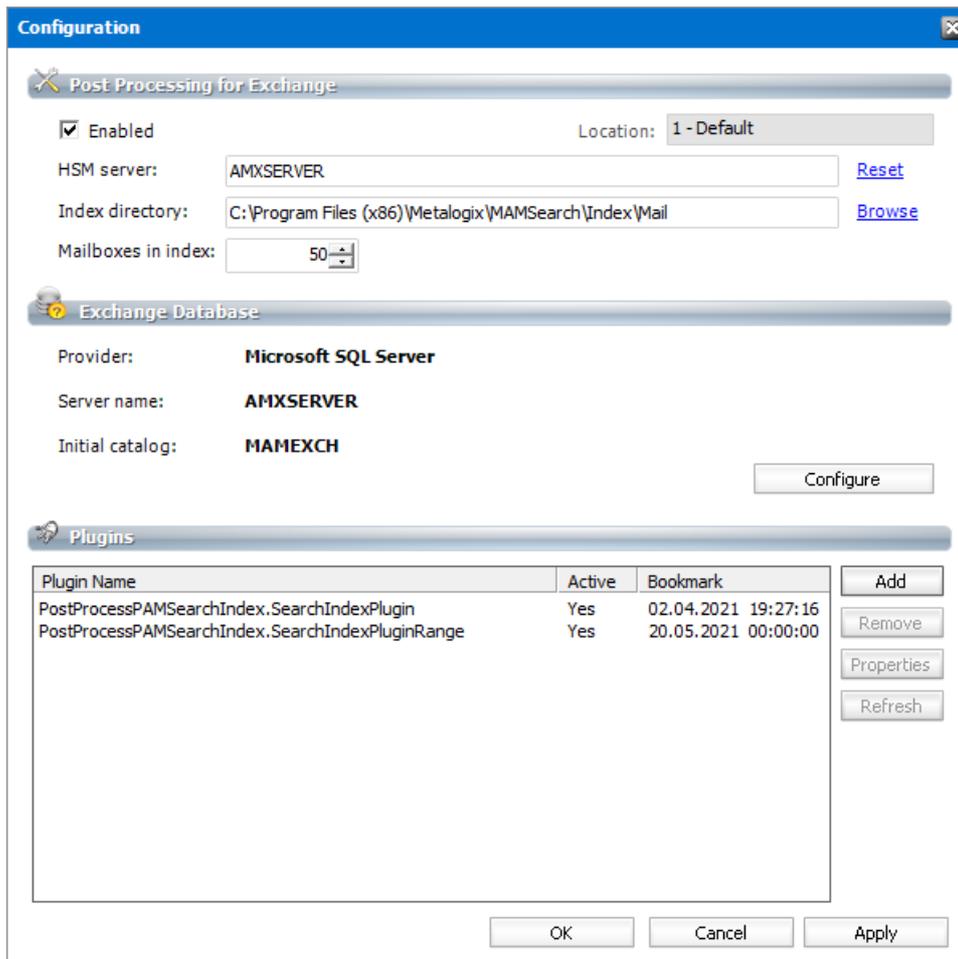
To activate the above mentioned searching by recipients, a post processing plugin must be installed. This plugin indexes mail recipients.

## Steps to install the SearchIndexPluginRange post processing plugin

1. Open Archive Manager Configuration Tool from `<installdir>\ Program Files (x86) \Common Files \ PAM \ PAMConfig \ PamConfig.exe`.
2. Open the **Post Processing** tab.
3. Open the **Post Processing Scopes** tab.
4. Right-click on the desired scope and from the context menu and select **Configure**.
5. Click **Add**.
6. Installed plugins will be loaded in the *Add Plugin* pop-up window. Select **PostProcessPAMsearchIndex.SearchIndexPluginRange** from the drop-down box and click **Add**.



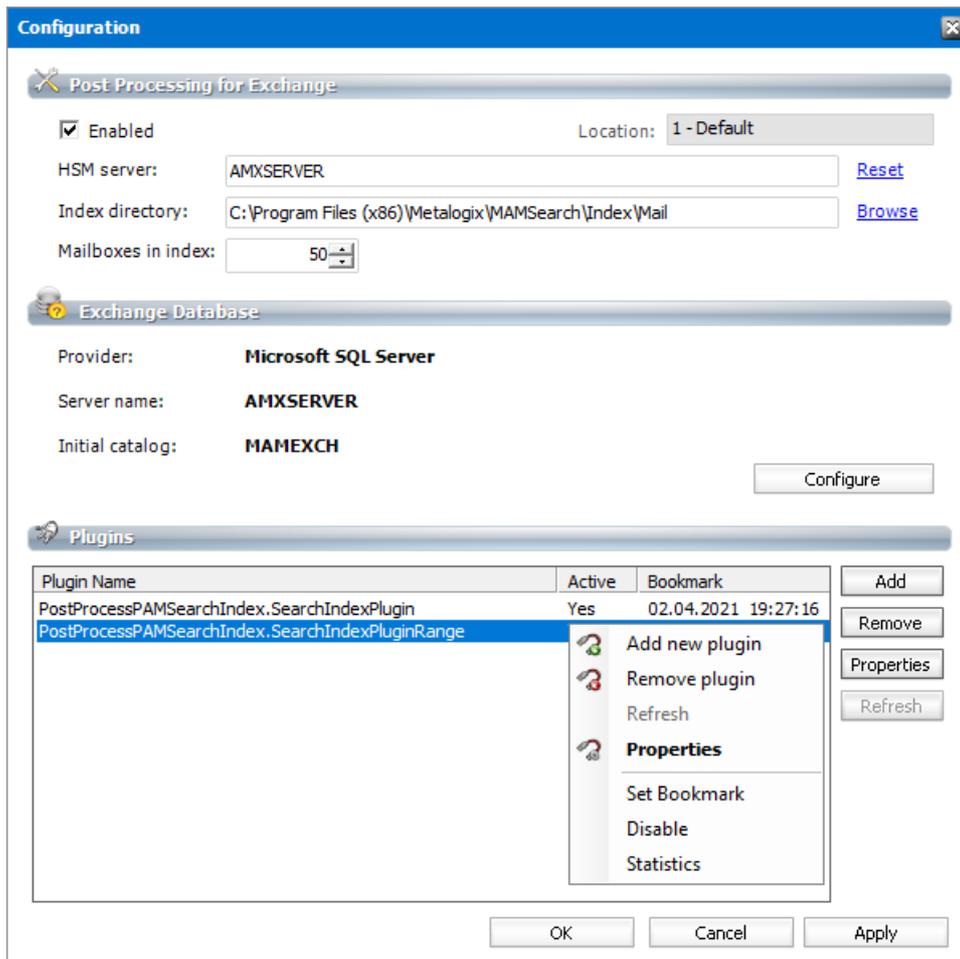
7. The plugin is listed in the *Plugins* list in *Configuration* tab. By default it is active.



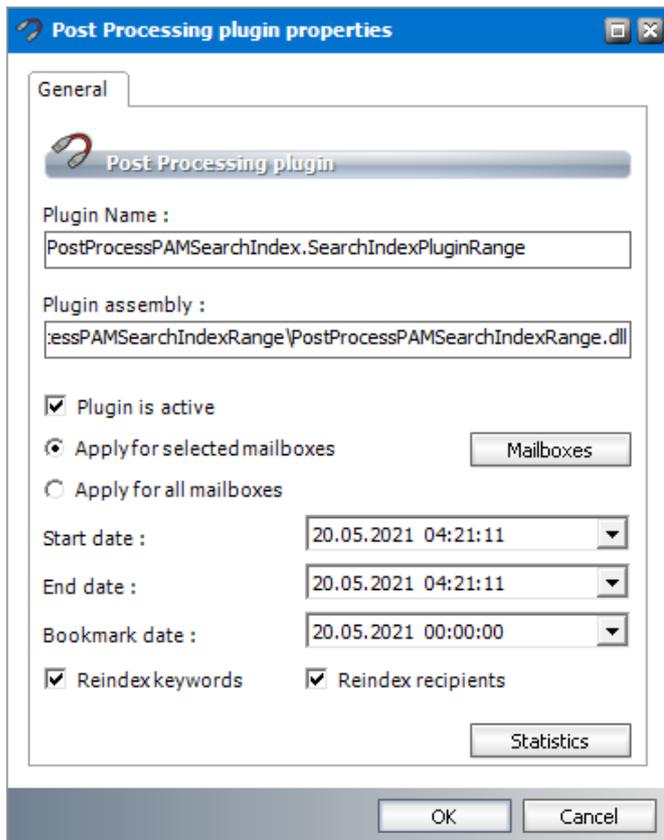
## Steps to Configure a Plugin

When a new plugin is added to the *Plugins* list, there are no mailboxes specified by default. You must specify the mailboxes as well as the **Bookmark Date**. If no mailboxes are selected then post processing will not process any archived emails and attachments.

1. From the *Plugins* list, select the **PostProcessPAMsearchIndex.SearchIndexPluginRange** plugin. Either click the **Properties** button or right-click the selected plugin and click **Properties** from the context menu.

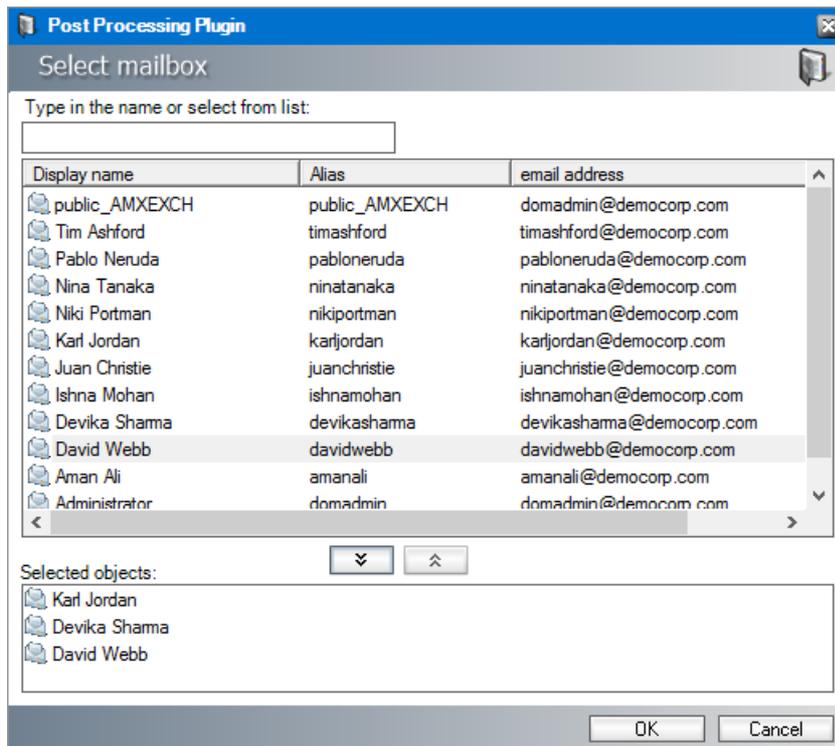


2. In the *Post Processing plugin properties* window set the properties as described below.

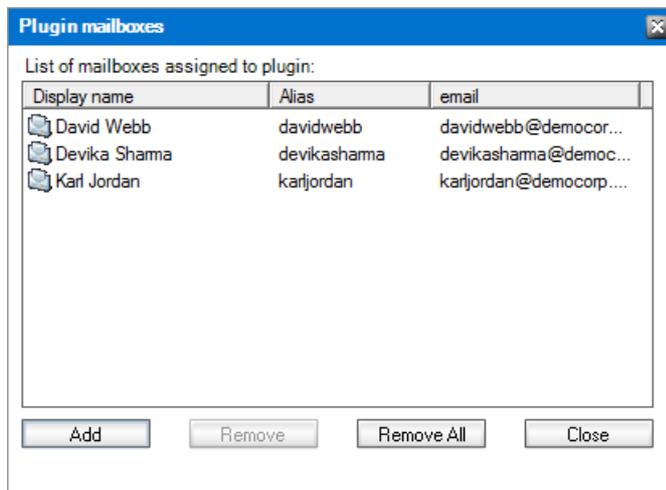


The plugin properties are as follows;

- a. **Plugin is active** - select this check box to activate the plugin.
- b. **Apply for selected mailboxes** - the plugin scope is determined by the mailboxes that you can select when you click **Mailboxes**.
  - i. In the *Plugin mailboxes* window click **Add** to add mailboxes.
  - ii. In the *Select mailbox* enter the name of a mailbox in the text box to search for the mailbox. Double-click the desired mailbox in the list to transfer it to the *Selected objects* section. In the *Selected objects* section you can check which users you have selected.



iii. Confirm by clicking **OK**. The selected mailboxes appear in the *Plugin mailboxes* window.



iv. Click **Close**.

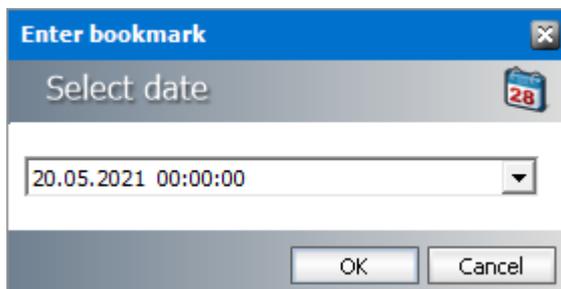
- c. **Apply for all mailboxes** - the plugin scope is across all mailboxes.
- d. **Start Date** - indicates the date when email indexing starts. Click the drop down to set the date from the calendar popup.
- e. **End Date** - indicates the date when email indexing ends. Click the drop down to set the date from the calendar popup.
- f. **Bookmark Date** - indicates the most recent index date and time. Click the drop down to set the date from the calendar popup. When the plugin is installed, the **Bookmark Date** should be the same as the **Start Date**. If you want to index old email items, set the **Start**

**Date** and the **Bookmark Date** to the same date in the past from where you would want the indexing to begin.

- g. **Reindex keywords** - select this check box if keywords should be re-indexed within the specified data range.
- h. **Reindex recipients** - select this check box if email recipients should be re-indexed within the specified data range.

## Steps to specify a bookmark date and time

1. Right-click the plugin and click **Set Bookmark** from the context menu.
2. In the *Enter bookmark* window specify the desired time. Click **OK**.



- i** **NOTE:** The bookmark date is displayed in the *Plugins* list in the *Configuration* tab. If you reset the bookmark date, the change takes effect immediately, and there is no need to deactivate and activate the plugin again. If you remove a plugin using the **Remove** button, it will stop entirely without remembering where it stopped. You must reconfigure the plugin if you reload it.

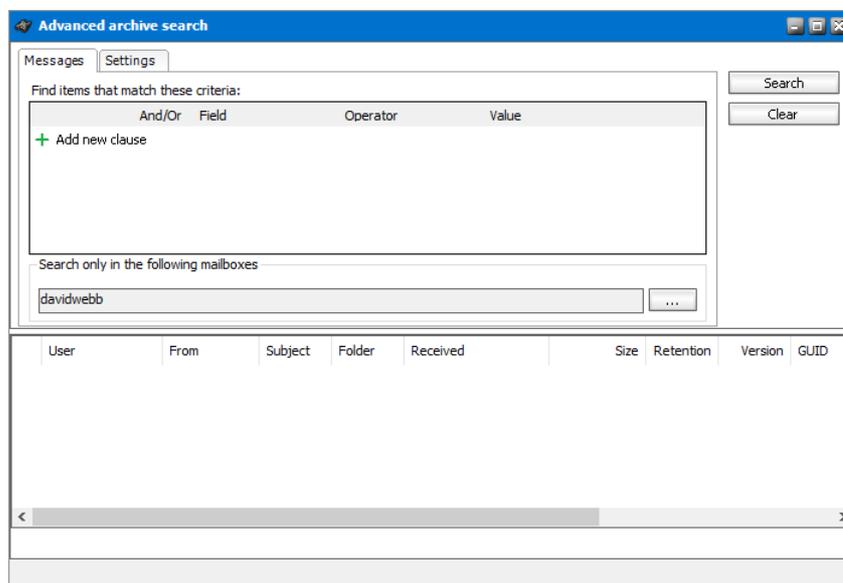
## Advanced Search

The Advanced Search feature helps an administrator to search for archive items. *It cannot be used to search non-archived items.* This feature is a component of Archive Manager and is installed by default. Advanced Archive Search has some special capabilities:

- It can search for emails in the archive that are marked for deletion. Items that are marked for deletion are not visible in the **Archive** tab but they still reside in the archive until their retention time expires.
- It can perform an OCR search in attachments that contain scanned content. However, characters that are too small may not be correctly recognized. This capability must be activated in the **Configuration** tool > **Post Processing** > **OCR Engine** tab.

### Steps to search for archived emails

1. Click the **Advanced Search** icon  on the toolbar. The **Advanced archive search** window opens.
2. Click the **Messages** tab.

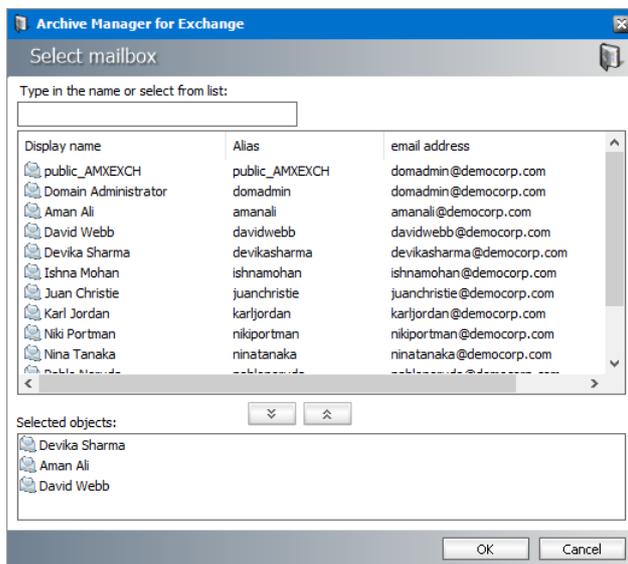


3. Click **Add new clause** and enter the search criteria using the fields as described below:
  - a. **Field** - click the drop down to select the property of the email to be searched. For example, select *Subject* as the field to search.
  - b. **Operator** - click the drop down and select a search operator.

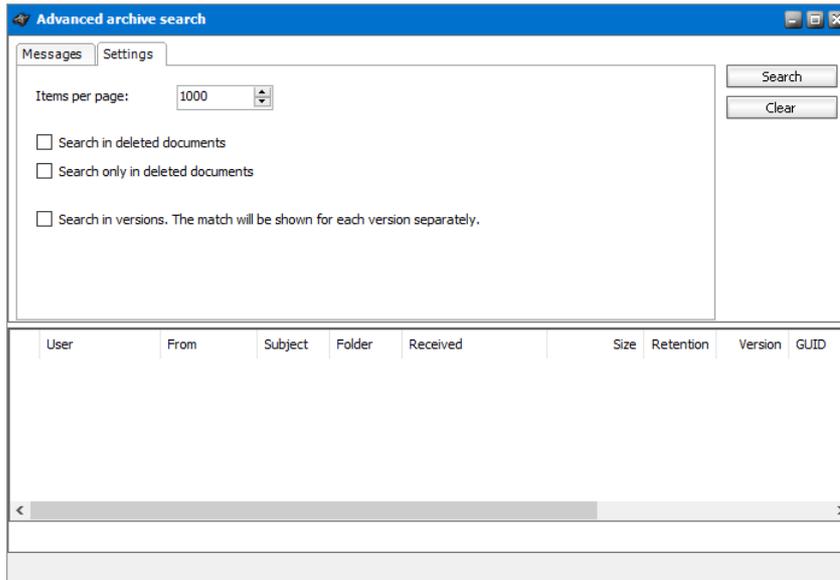
- c. **Value** - Specify the search text. If the selected **Field** requires a date value, a date picker icon appears to help you choose a date. This field supports wildcard characters as described in the table below:

Wildcard	Description	Example
*	A substitute for zero or more characters	*.pdf
?	A substitute for a single character to match	Sales201?.pdf

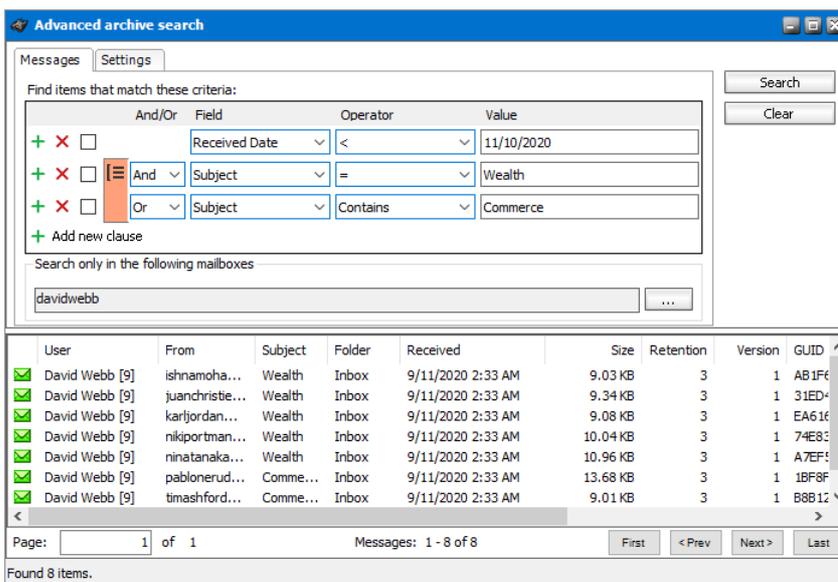
- To add more criteria, click **Add new clause** again. When you add more than one search clause, the logical operator drop down box appears. You can select either the **And** or the **Or** operator. The default operator is **And**. You can even group clauses to create nested search criteria by selecting consecutive check boxes and clicking the  icon.
- To restrict your search to one or more mailboxes, click the button with the three dots in the *Search only in the following mailboxes* section.
- From the *Select mailbox* window that opens, select one or more mailboxes and then click  to move them to the **Selected objects** box. Click  to remove them from the **Selected objects** box.



- Click **OK** to close the window. The selected mailboxes will appear in the *Search only in the following mailboxes* field.
- Click the **Settings** tab.



9. Configure the settings if needed, as described below:
  - a. **Items per page** - restricts the number of emails that can be displayed in the search result list.
  - b. **Search in deleted documents** - select this check box to search through emails that are marked for deletion.
  - c. **Search only in deleted documents** - select this check box to exclusively search through emails that are marked for deletion. All other archived emails will be ignored.
  - d. **Search in versions** - select this check box to search through all versions of the archived emails and each match will be returned in the result list.
10. Click **Search** to search for archived emails based on the selection criteria, the mailboxes specified and the settings that are applied. Items marked for deletion are displayed with a blue icon in the search result list.



## Example of a nested search query

Consider the following search request: *All email items that were received by David Webb before 10th November 2020 and the subject contains either the words Wealth or Commerce.*

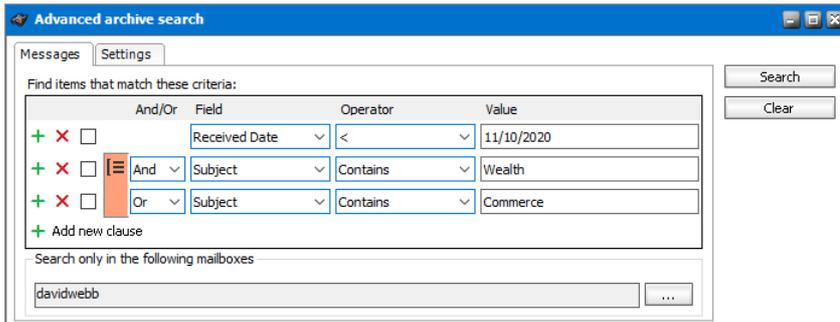
Search criteria contains only email properties. Therefore the nested search criteria can be written as follows:

```
Received Date < 11/10/2020 AND (Subject contains Wealth OR Subject contains Commerce)
```

The context of the search query is restricted to a single mailbox called *David Webb*, but there are no restrictions to the scope since *All items* are required to be searched in the specified mailbox.

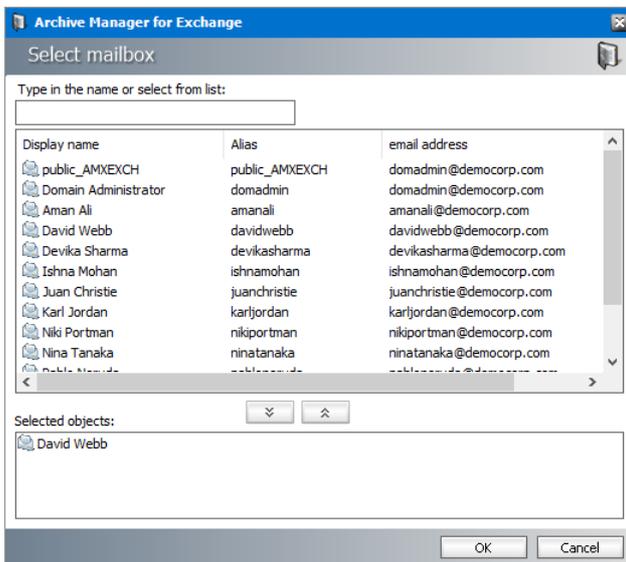
To define the query in the Advanced archive search window, follow the steps described below:

1. Click the **Advanced Search** icon  on the toolbar. The **Advanced archive search** window opens.
2. Click the **Messages** tab.
3. Click **Add new clause** and enter the search criteria using the fields as described below:
  - a. **Field:** Received Date
  - b. **Operator:** <
  - c. **Value:** 11/10/2020
4. Click **Add new clause** and enter the search criteria using the fields as described below:
  - a. **And/Or:** And
  - b. **Field:** Subject
  - c. **Operator:** Contains
  - d. **Value:** Wealth
5. Click **Add new clause** and enter the search criteria using the fields as described below:
  - a. **And/Or:** Or
  - b. **Field:** Subject
  - c. **Operator:** Contains
  - d. **Value:** Commerce
6. Since *Subject Contains Wealth Or Subject Contains Commerce* are nested criteria, select the two check boxes where the **Field** value is *Subject*. Then click the  icon that appears. The fields that are grouped are marked as shown on the image below:

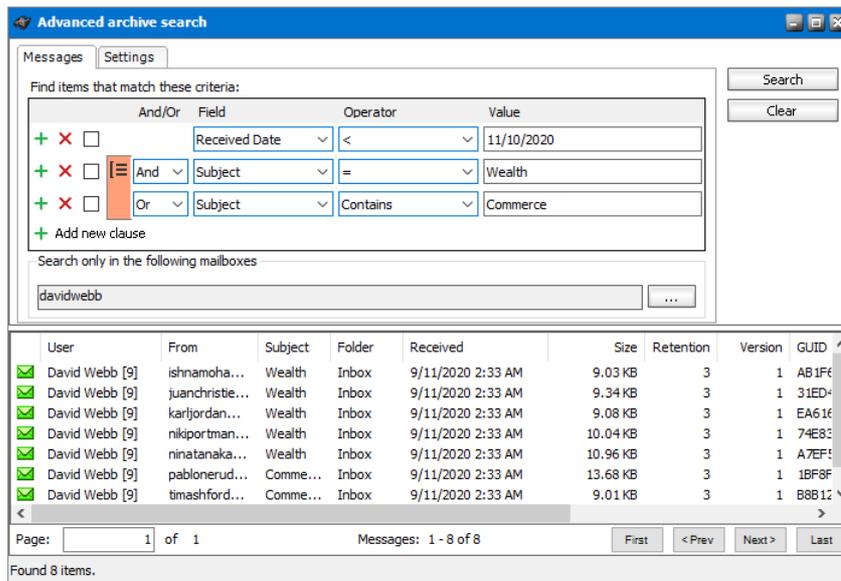


**i NOTE:** If there are nested criteria within a nested criteria, start the grouping with the innermost nest. When the grouping is successfully applied, the checked boxes are cleared and the group icon disappears.

7. Click the button with the three dots in the *Search only in the following mailboxes* section.
8. From the *Select mailbox* window that opens, select **David Webb** and then click  to move them to the **Selected objects** box.



9. Click **OK** to close the window. The selected mailboxes will appear in the *Search only in the following mailboxes* field.
10. Since the scope of the search is *All items*, there is no need to change any properties in the *Settings* tab.
11. Click **Search** to search for archived emails based on the selection criteria, the mailboxes specified and the settings that are applied.



## Search result options

You can perform the following operations on the emails that are displayed in the search result list:

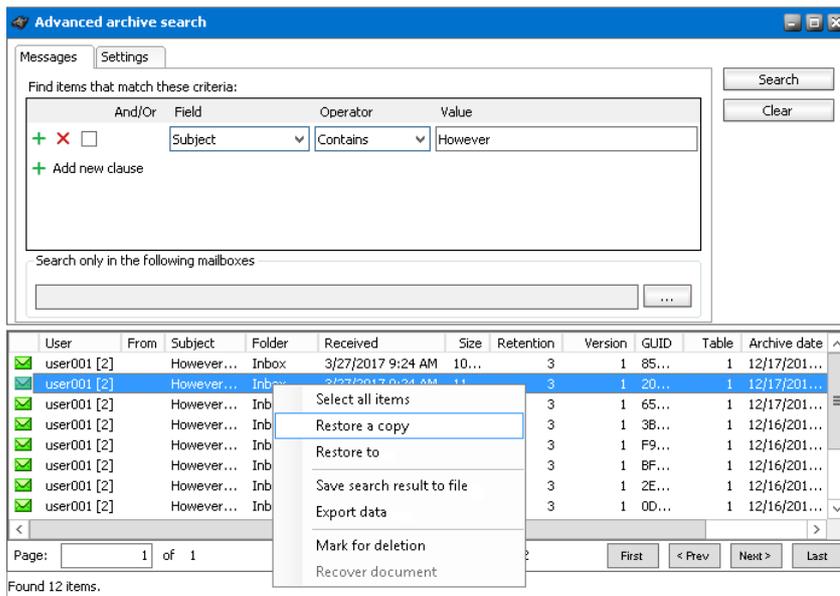
- [Restore a copy](#)
- [Restore To](#)
- [Save search result to file](#)
- [Export data](#)
- [Mark for deletion](#)
- [Recover a document](#)

## Restore a copy

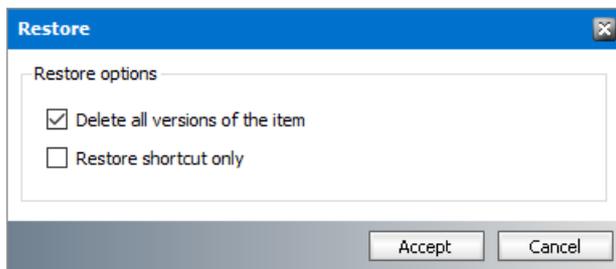
One or more archived emails can be restored to their original location. This is useful when a user has deleted an email that was archived and would like to restore it from the archive again.

### Steps to restore emails to their original mailboxes

1. Right-click the selected email(s) and choose **Restore a copy** from the context menu.



2. The **Restore** window opens.



- Check **Delete all versions of the item** to restore the email to the mailbox and delete all other versions.
- Check **Restore shortcut only** to restore only the shortcut.

**i** **NOTE:** Either the shortcut or the email is restored to the mailbox even if the original shortcut/email is also in the mailbox, i.e. duplicate items can be created. If no check box is selected, the whole email is restored to the mailbox without marking any version for deletion.

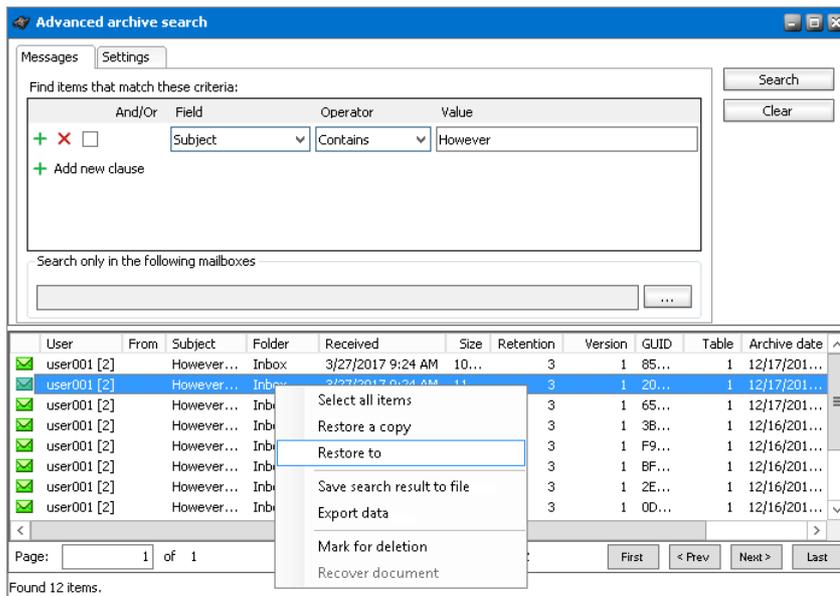
3. Click **Accept**.

## Restore To

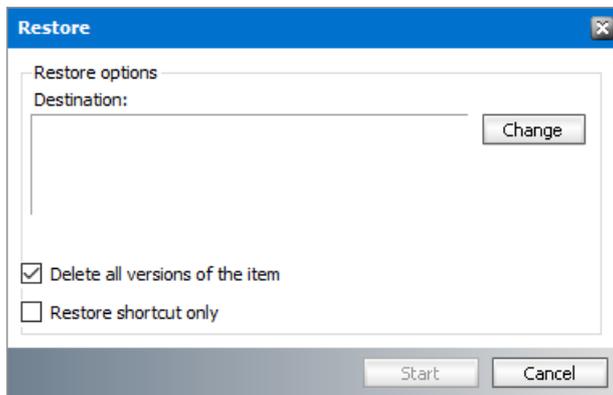
One or more archived emails can be restored to another location.

### Steps to restore emails to another location

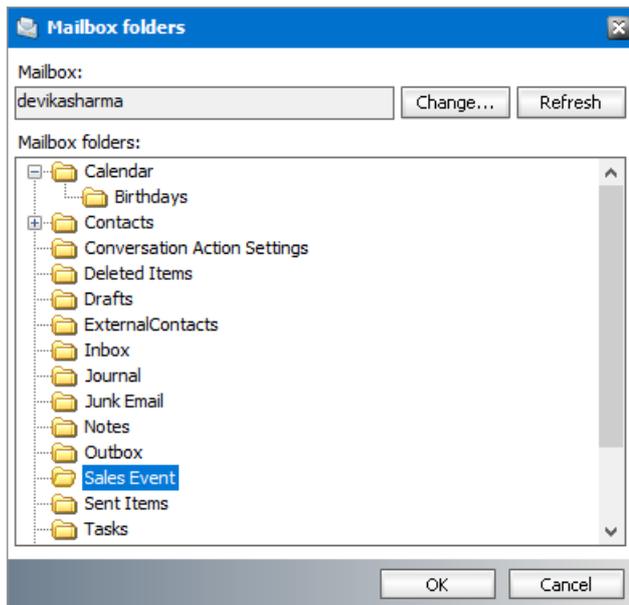
1. Right-click the selected email(s) and choose **Restore a copy** from the context menu.



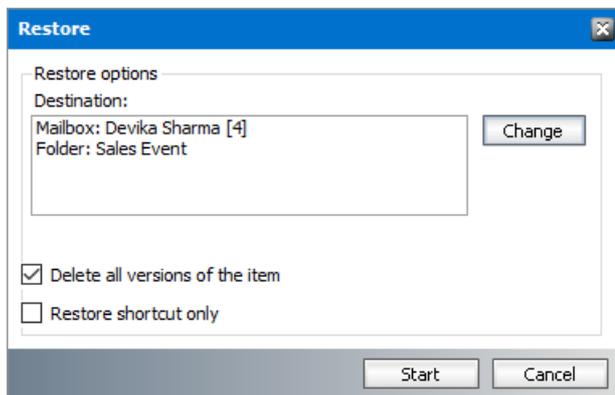
2. The **Restore** window opens.



- To specify a destination mailbox folder click **Change**. The *Mailbox folders* window opens.
- Click **Change** to choose another mailbox or click **Refresh** to display the folders in the selected mailbox.



- c. Select a folder from the list of folders and click **OK** to close the window.



- d. Check **Delete all versions of the item** to restore the email to the mailbox and delete all other versions.
- e. Check **Restore shortcut only** to restore only the shortcut.

**i** **NOTE:** Either the shortcut or the email is restored to the mailbox even if the original shortcut/email is also in the mailbox, i.e. duplicate items can be created. If no check box is selected, the email is restored to the mailbox without marking any version for deletion.

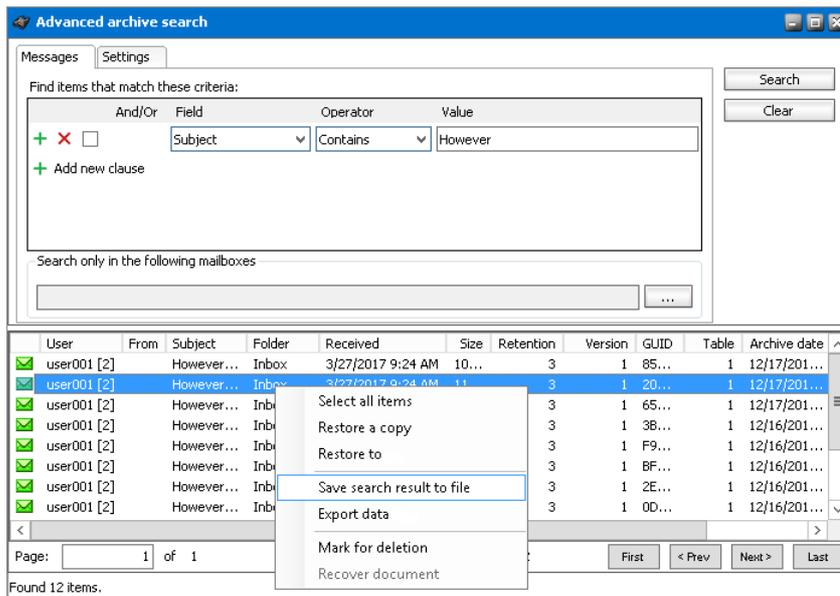
3. Click **Start** to restore the selected emails to the new destination.

# Save search result to file

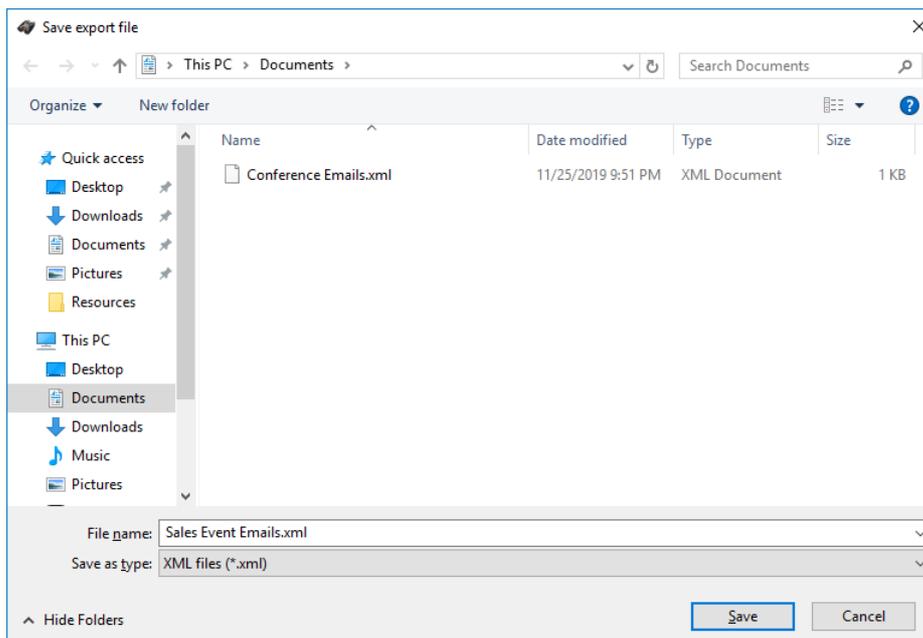
You can export all the items in the search result to an XML file.

## Steps to export data

1. Right-click anywhere in the search result list and choose **Save search result to file** from the context menu.



2. The **Save export file** window opens.
3. Specify the name of the file and click **Save**.

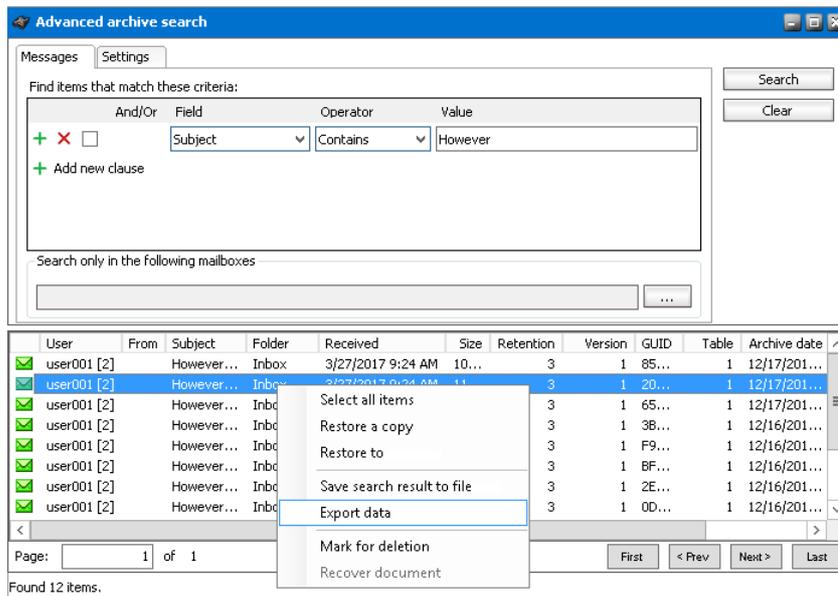


# Export data

Archive Manager for Exchange allows exporting of found items to a mailbox or PST file by running export tasks. Administrator can even export emails saved in several search result files by adding one or more documents to one export task.

## Steps to export search results

1. Right-click in the result list and from the context menu choose **Export data**.



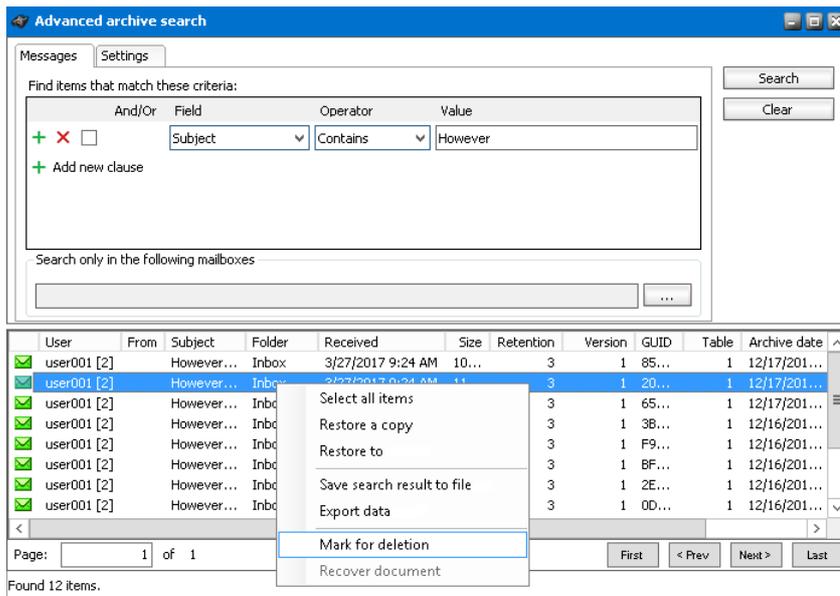
2. The **Export tasks** window opens. You can also open this tool when you click **Export tasks** from the **Tools** menu. For more information about exporting data see [Export Tasks](#).

# Mark for deletion

This option marks selected documents as deleted. Only documents marked as deleted can be purged from the archive after their retention time expires. They will be completely deleted with the *Delete Files* job, if such a job is scheduled. Documents that are not marked as deleted will never be purged unless you have defined a retention time for them.

## Steps to mark items for deletion

1. Right-click the selected item in the search result list view and select **Mark for deletion** option from the context menu.



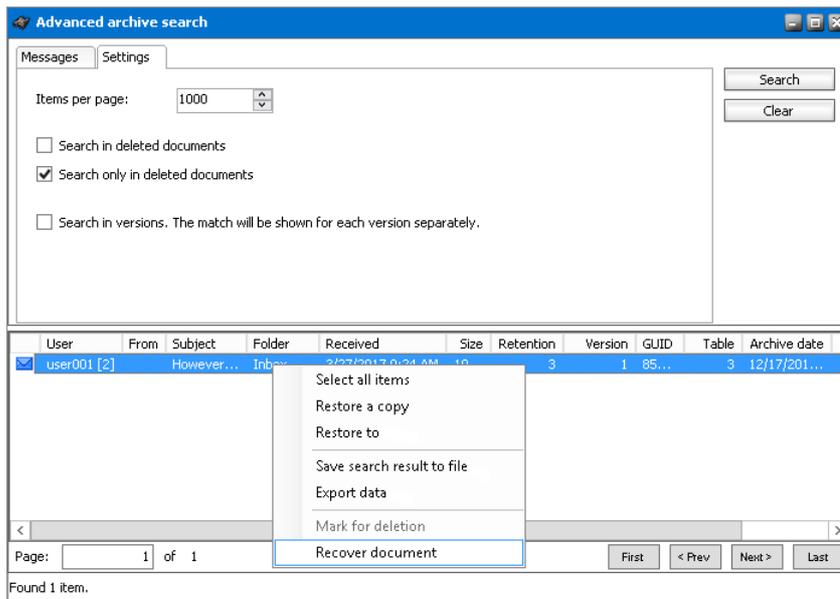
2. Then click **Yes**. As a result the item will be marked for deletion. It will neither be accessible in the **Archive Manager for Exchange** sever nor in the **ArchiveWeb** application. It can be only be found with the **Advanced Archive Search**.

## Recover document

Email items that are marked for deletion but available in the archive are displayed with blue icons in the search results list. It is possible to recover these documents and view them in Archive Manager for Exchange server and in ArchiveWeb.

### To recover document marked for deletion:

1. Right-click the selected item in the search results list view and select **Recover document** option from the context menu.



2. As a result the deletion mark will be removed and the item will be again displayed on the **Archive** tab in the **Archive** view as a lost item. It will be also be accessible also **ArchiveWeb**.

## Appendix

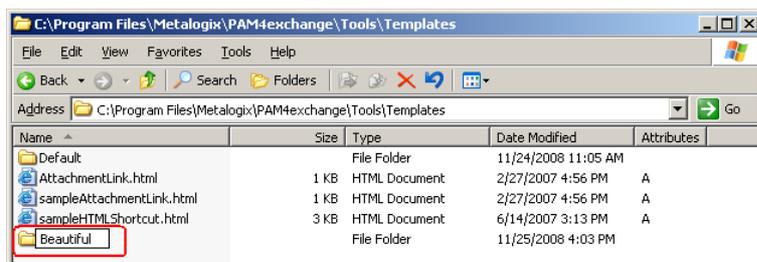
- [How to create a customized HTML shortcut template](#)

### How to create a customized HTML shortcut template

On the **Shortcut** tab of the Archive Manager for Exchange (**Tools/Options/Archive settings/Shortcut** tab) you can configure Archive Manager for Exchange to create HTML shortcuts for archived emails. The appearance of the archived email in the Outlook Preview pane depends on the template which you choose on that **Shortcut** tab. Besides the default template for the shortcuts you can create your own templates satisfying your criteria and thus modify the design of the Outlook preview pane for archived emails.

#### To create your own template:

1. Go to <installdir>\Metalogix\MAM4Microsoft Exchange\Tools\Templates.
2. In the **Template** directory create a new folder. Its name will be the name of your new template displayed on the **Tools\Options\Archive settings\Shortcut** tab of **Archive Manager for Exchange** (in our example the name of the template is *Beautiful*).



3. Copy the **sampleHTMLShortcut.html** file to the new template folder (in our case to *Beautiful*). Or copy the html file from the Default folder, if the sample is not available.
4. Rename the **sampleHTMLShortcut.html** to **HTMLShortcut.html**.
5. Now you can modify the **HTMLShortcut.html** file in the new folder to create your desired template. To do so, open the file in Notepad and edit the HTML code.

#### Important variables:

%ATTACHMENTS% - email attachments

%BUTTONS% - buttons

%BODY% - message body

%PROPERTIES% - message specific properties needed for Macintosh clients

## The original HTML:

```
<!DOCTYPE html PUBLIC "-//W3C//DTD XHTML 1.0 Strict//EN"
"http://www.w3.org/TR/xhtml1/DTD/xhtml1-strict.dtd">
<html xmlns="http://www.w3.org/1999/xhtml">
<head>
<meta http-equiv="content-type" content="text/html; charset=utf-8"/>
<title>
</title>
<style type="text/css">
<!--
body {
margin: 0;
text-align: center;
padding-top: 10px;
}

td.hlavicka {
display: block;
height: 20px;
color: white;
background-color: #6699FF;
font-family: arial;
font-size: 14px;
text-align: left;
}

td.hlavicka span {
font-weight: bold;
padding-left: 5px;
}

td.buttons {
vertical-align: bottom;
text-align: right;
padding-right: 10px;
padding-bottom: 10px;
}

td.buttons a {
color: #FFFFFF;
background-color: #6699FF;
font-family: arial;
font-size: 11px;
padding: 5px;
border: 1px solid #333366;
font-weight: bold;
text-decoration: none;
margin-left: 3px;
}

td.buttons a: hover {
font-size: 12px;
font-weight: bold;
}

td.prilogy {
background-color: white;
```

```

font-family: arial;
font-size: 12px;
padding: 5px 5px 5px 5px;
text-align: left;
}

td.priority {
color: black;
margin-right: 15px;
margin-top: 15px;
font-style: normal;
}

td.priority:hover {
text-align: center;
font-weight: bold;
}

td.cara {
background-color: #333366;
width: 100%;
}

td.text {
display: float;
color: #2a2a2a;
text-align: center;
background-color: white;
font-family: arial;
font-size: 12px;
padding: 5px;
text-align: left;
}

td.stred {
border: 1px solid #333366;
}

td.pata {
display: block;
width: 99.9%;
height: 15px;
background-color: #6699CC;
padding-right: 0;
}
-->
</style>

</head>
<body>
<table width="100%" border="0" cellspacing="0" cellpadding="0">
<tr>
<td bgcolor="white" class="stred" height="100%">
<table width="100%" border="0" height="10" cellspacing="0" cellpadding="0">
<tr>
<td height="100%" class="hlavicka"> <span>This message was archived</span></td>
</tr>
</table>

```

```

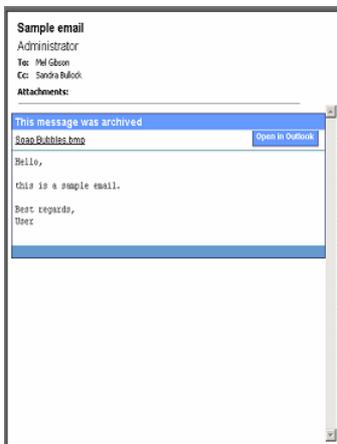
<table width="100%" border="0" height="10" cellspacing="0"
cellpadding="0">
<tr>
<td height="100%" class="priority">%ATTACHMENTS%</td>
<td height="100%" class="buttons" nowrap>%BUTTONS%</td>
</tr>
</table>

<table width="100%" border="0" height="2" cellspacing="0"
cellpadding="0">
<tr>
<td bgcolor="#a0c3c9" width="100%" height="2px"></td>
</tr>
</table>

<table width="100%" border="0" height="10" cellspacing="0"
cellpadding="0">
<tr>
<td height="100%" class="text">
<pre WRAP="hard">%BODY%</pre>
</td>
</tr>
</table>

<table width="100%" border="0" height="10" cellspacing="0"
cellpadding="0">
<tr>
<td height="100%" class="para"><b></b></td>
</tr>
</table>
</td>
</tr>
</table>
</body>
</html>

```



Default HTML shortcut in the preview pane      Example of customized HTML shortcut

---

## About Us

Quest creates software solutions that make the benefits of new technology real in an increasingly complex IT landscape. From database and systems management, to Active Directory and Office 365 management, and cyber security resilience, Quest helps customers solve their next IT challenge now. Around the globe, more than 130,000 companies and 95% of the Fortune 500 count on Quest to deliver proactive management and monitoring for the next enterprise initiative, find the next solution for complex Microsoft challenges and stay ahead of the next threat. Quest Software. Where next meets now. For more information, visit [www.quest.com](http://www.quest.com).

## Contacting Quest

For sales or other inquiries, visit [www.quest.com/contact](http://www.quest.com/contact).

## Technical Support Resources

Technical support is available to Quest customers with a valid maintenance contract and customers who have trial versions. You can access the Quest Support Portal at <https://support.quest.com>

The Support Portal provides self-help tools you can use to solve problems quickly and independently, 24 hours a day, 365 days a year. The Support Portal helps you to:

- Submit and manage a Service Request
- View Knowledge Base articles
- Sign up for product notifications
- Download software and technical documentation
- View how-to-videos
- Engage in community discussions
- Chat with support engineers online
- View services to assist you with your product