





# FILE ARCHIVE BEST PRACTICES

## in

# contentACCESS version 4.2



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#### Use case: Steps for File archive configuration

This document gives you an overview about how to configure a **File archive** job, including the **Indexing** job for the files.

*Important:* Please keep in mind that the names, configurations, and units that we chose in this use case have only an informative character.

A company is using contentACCESS File Archive with 2 criteria: **a**) the **Keep original** method (backup files with versioning) is often used daily, while **b**) files older than 1 year are archived with the **shortcutting** method. The main advantage of the **b**) method is the spared space on the computer. It is much easier to restore/reopen files stored with method **a**). It depends on a particular situation which method is recommended to use. You can use both methods simultaneously to have your daily backup (with versions when files are changed) and archive your old files using shortcuts.

Goal:	TECH-ARROW's file archive
Folders to be archived:	Share <u>\\TACATEST\Microsoft materials</u>
Archiving method:	using shortcuts
contentACCESS single server:	tacatest
CPU:	2.4 GHz quad core
Memory:	24 GB
Storage:	single disk store
Database:	single database
Retention time:	10 years
Scheduler:	provisioning job running daily from 1 AM;
	file archive process running every hour
Monitoring:	troubleshooting of potential system and job related
	misconfiguration.



#### Installation of the product

**Install contentACCESS** on a server and open the <u>Central administration</u> interface of the software. Log in with the system user credentials. (For more details, refer to the <u>contentACCESS</u> <u>Manual</u>).

#### Installation of virtual drive

If you are archiving with the "Keep original" method: It is not a must to have virtual drive if you are archiving your files by keeping them in the original file location. However, it can be used to browse the archived data or to share the archived files with other users (e.g., if you do not use <u>contentWEB</u>).

**If you are archiving using shortcuts**: When a file is archived using shortcuts, it is replaced with the respective shortcut that links to the virtual drive. This helps to save storage space. The user can easily retrieve the archived items using these shortcuts if the virtual drive is installed. If the drive is not installed, the shortcut retrieve does not work. As we will use shortcuts in this use case, we need to have it installed.

#### The rule is to install virtual drive

- **if the files are archived using shortcuts** and they need to be retrieved using these shortcuts
- if the drive is used as a substitute of contentWEB archive interface

Virtual drive is by default unzipped to C:\TECH-ARROW\contentACCESS\_Package\Setups. For more information on how to install virtual drive, read the <u>contentACCESS Virtual Drive</u> <u>Installation Manual</u>.



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E Desktop	🐌 Tools	2/11/2017 12:35 PM	File folder		
🐌 Downloads	🐌 VC2015	9/28/2017 4:27 PM	File folder		
laces Recent places	Configuration.xml	9/11/2019 3:26 PM	XML File	4 KB	
👢 PST	Configuration_template.xml	5/29/2019 10:35 PM	XML File	2 KB	
	🔻 contentACCESS.OutlookAddin_x64.exe	8/16/2019 9:55 AM	Application	4,523 KB	
This PC	🔻 contentACCESS.OutlookAddin_x86.exe	8/16/2019 9:56 AM	Application	4,449 KB	
E Desktop	🔻 contentACCESS.RemoteFileArchiver_x64	8/16/2019 9:49 AM	Application	7,355 KB	
Documents	🔻 contentACCESS.Search_x64.exe	8/16/2019 10:00 A	Application	86,911 KB	
🗼 Downloads	₹ contentACCESS.SMTPServer_x64.exe	8/16/2019 9:57 AM	Application	56,416 KB	
🐌 Music	🔻 contentACCESS_LegacyELM_service.exe	8/16/2019 10:01 A	Application	5,092 KB	
🛓 Pictures	🔻 contentACCESS_LegacyMAM_service.exe	8/16/2019 10:01 A	Application	5,100 KB	
Videos	🔻 contentAccess_x64.exe	8/16/2019 9:50 AM	Application	132,386 KB	
bcal Disk (C:)	ኛ contentACCESSLogin.exe	8/16/2019 9:54 AM	Application	63,137 KB	
🛃 DVD Drive (D:) Ol	₹ contentACCESSWS_x64.exe	8/16/2019 9:53 AM	Application	17,822 KB	
contentACCESS V	ኛ contentWEB_x64.exe	8/16/2019 9:52 AM	Application	91,111 KB	
$\checkmark$	VirtualDrive x64.exe	8/16/2019 9:55 AM	Application	8,964 KB	

#### Virtual drive configuration

Open the <u>Virtual drive configuration</u> page (*System* tab  $\rightarrow$  *Client Applications* group  $\rightarrow$  *Virtual drive configuration* button) in the Central Administration ribbon, and 1) specify the Virtual drive server name, 2) load the virtual drive settings, and 3) save your changes.

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Save Discard changes 3.	Roles Us	ers Invitation	s Login providers	System	Licensing	Notifications	Monitoring	Auditing	Cluster	Statistics	Legal hold	Task runner	Indexing	SMTP Servers	SMTP Mappings	Tenants	All databases	contentWEB	officeGATE	contentACCESS mobile	Virtual drive configuration	Applications settings
Edit		Security							Service	25						Te	nants			Client Applicatio	ons	
	tem > Client	TVE COT Applications tacatest.ta.	> Virtual dr	rive confi	ings	or localhost.																



#### Active directory integration settings.

Open the <u>System</u> page (by navigating to **System** tab  $\rightarrow$  **Services** group  $\rightarrow$  **System** button on the ribbon) and enter the Lightweight Directory Access Protocol (LDAP) server name in the corresponding section, like the picture below.

Enter the user and user credentials, run a test connection, and save your settings.

<i>Note</i> : The va	alues will be used for user name resolving.	
ContentACCESS Central Admin       System       File Archi       Image: Save Charges       Save Charges		
Edit	Security Eervices Tenants Client Applications	
External accessibility settings Retrieve server FQDN: Enable link security: Central login:	https       * /// (scatest tainternal       : [443 \$]         Enter an externally accessible alias for the contentACCEES server. This value is used for shortout links too.         Test         http       * // (scatest tainternal         i       80 \$)         Provide necessary information, where central login is deployed.         Test	
Active Directory integration set	Enter the LDAP server name or IP address if you are out of the domain. This value is used for user name resolving. None	
Use explicit credentials		
User name:	talµdministrator	
Password: Confirm password:		
Alexandra and an	Test (1) Ordina help •	

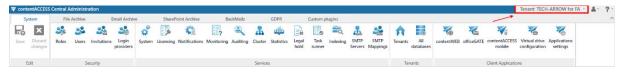
#### **Adding a Tenant**

*Important*: If you have a single tenant-license, you can skip this step, as the **Default** tenant will be automatically created.

Open the <u>Tenants</u> page (**System => Tenants => Tenants**) and click **+ new**. Add and **Configure** a new tenant & tenant administrator into the system.

System       File Archive       Email Archive       SharePoint Archive       BackMailz       GDPR       Custom plugins         Image: System       File Archive       Email Archive       SharePoint Archive       BackMailz       GDPR       Custom plugins         Image: System       Image: System <td< th=""></td<>
Image: Save Discard       Users Invitations Login       System Licensing Notifications Monitoring Auditing Cluster Statistics       Legal       Task       Indexing       SMTP       SMTP       Tenants       A
changes providers hold runner Servers Mappings 🛁 data
Edit Security Services Tenants

The newly created tenant appears in the upper right corner of the **Central Administration** user interface, like on the picture below:



*Note:* If you want to read the detailed description of tenant creation and configuration, please, check <u>this</u> section of our online documentation.

#### Create the needed database(s) for your tenant

Open page <u>All databases</u> (*System* => *Tenants* => *All databases*), click + create new and specify the required values in the *Database repository* window. Create a single SQL database to **TECH**-**ARROW for FA** tenant with connection name "File Archive DB" and Database user "DBAdmin". The application will automatically set this first created database to default.

*Note:* When creating databases, consider the size of the company and the number of archived files. For bigger companies with a high number of files, it is recommended to create a separate databases to ensure the transparency of the processes. The first created database will be automatically set as default database for the respective tenant. This option is configurable on the **Databases** page using the context menu.



V contentACCESS Cen	tral Administration						
System							
Save Discard changes	iles Users Invitations	Login System	Licensing Notifications	Monitoring Clust	er Statistics	SMTP Servers	s All databases
Edit	Security			Services			Tenants
System	databases > Tenants > All databas e existing + c	es reate new	update all da	tabases			
	Database repo	-	File Archive DB			×	
	Use system dat Type: Server name: Database: Schema: Database user	abase server (TAP	NEWS) MSSQL TANEWS File Archive DB dbo			···	
	Use explicit use New or existing Password: Confirm password	user:	DBAdmin  Generate user and	password			
	Connect with user Use explicit cre User: Password: Confirm passwoi	dentials	5a				
	Database cor     Test database co     Tenant:		ull! TECH-ARROW			Ŧ	
					Save	Cancel	

### **Configuration details**

#### Connection name: the display name of the database in contentACCESS

### **V**techarrow

**Option "Use system database server"**: if the database must be created on the system database server (like in this use case), select this option; otherwise, specify the required database values (**Server name, Database, Schema**) manually.

In section **Database user**, you need to specify a user for the newly created database:

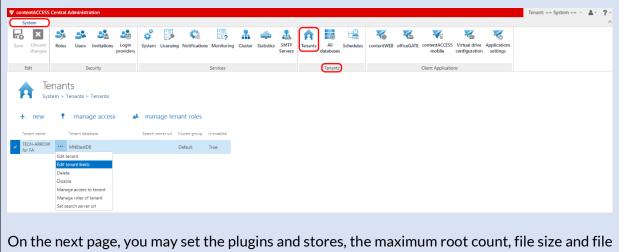
Enter the credentials of the existing MSSQL user or create a new user and password by clicking on the **Generate user and password** button. contentACCESS will give access rights to the database on MSSQL for this user. This newly created user will have access permissions only to the created database. If you specify no explicit user in this section, then the service user will be used to access the database.

In section **Connect with user**, you must specify the MSSQL admin credentials:

**Use explicit credentials:** if this checkbox is not checked, then contentACCESS will automatically connect to the database (MSSQL) under the contentACCESS service account. If you wish to connect with an explicit user, then specify an admin user with the rights to create a new database on the database server.

**Tenants**: select the database owner tenant from the dropdown list (in our case **TECH-ARROW** for **FA**)

*Note*: Limitations to the newly created tenant can be set on the **Tenants** page, using the given tenant's context menu. Select "Edit tenant limits" in the context menu.



count that the TECH-ARROW tenant may archive. By default, these values are set to unlimited:



System					
ve Discard changes	rs Invitations Login providers	System Licensing Notifications Monitorin	Cluster Statistics SMTP Servers Transts All Schedules	contentWEB officeGATE contentACCESS Virtual drive Applications mobile configuration settings	
Edit	Security	Services	Tenants	Client Applications	
System > Tenant	nitations for ' s > werwerrwer > Limit				
ystem limitations lugins: lode count:	Unlimited unlimited (0 used)		Stores:	🖌 Unlimited	
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DPR for File system limitation					i) Online help

#### **File archive activation**

**Select TECH-ARROW tenant** in the upper right menu of the central administration user interface, and **open the File Archive** tab on the ribbon. **Activate File Archive** by clicking on the "Activate" button.

V contentACCESS	Central Administration						Tenant: TECH-ARROW for FA -
System	File Archive	Email Archive	SharePoint Archive	BackMailz	GDPR	Custom plugins	^
•							
Activate							
File Archive							

#### System settings

Open the <u>System settings</u> page (*File Archive* tab  $\rightarrow$  *Settings* group  $\rightarrow$  *System settings* button) and select the above created "File Archive DB" from the dropdown list. Deploy it.

The date, from which the retention of the documents will be calculated, can be selected here. Choose the setting to be applied from the dropdown list. Save your settings.

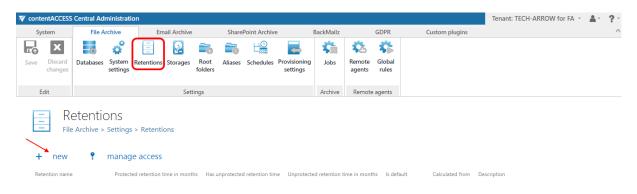
ontentACCESS	Central Administrati	on								Tenant: TECH	I-ARROW for FA	-	
System	File Archive	Email Arch	hive	SharePo	int Archive	BackMailz		GDPR	Custom plugins				
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Online help

Note: All the archived root folders (and their settings) are kept in this database.

#### **Retention settings**

Open the <u>Retentions</u> page (*File Archive* tab  $\rightarrow$  *Settings* group  $\rightarrow$  *Retentions* button) and create retention(s) to be used. In this use case, we will create one retention "10 years". Click + new and enter the required values into the repository window, like on the pictures below. Once the retention is created, save your changes.



>	techarrow		
Retention repository			×
Retention name:	10 years		
Description:			
Calculated from:	Archivation date		•
Protected retention time in months:	120		* *
Has unprotected retention time			
		Save	Cancel

*Note*: Retentions define the time of storing the binaries in the selected storage. When setting retentions in contentACCESS, consider the data retention requirements of your country. The retentions set on this page can be selected on the archive job's configuration page later.

#### Creating a single disk store

Open the <u>Storages</u> page (*File Archive* tab  $\rightarrow$  *Settings* group  $\rightarrow$  *Storages* button) and create your "File Archive storage". Click + new, select "Disk" store type, and enter the correct file path into the repository window, like the second picture below. Select the above created "File Archive DB", where this storage will write the metadata and save your settings.

🔻 conte	entACCESS	Central Ad	ministrati	on										Tenant: TECH-ARROW for FA 🝷	? -
Sys	stem	File A	rchive	Ema	ail Archive		Share	Point Archiv	e	BackMailz		GDPR	Custom plugins		^
F	х	Ö	a° .		2		2		-	<b>\$</b> 1	\$2	<b>\$</b> \$			
Save	Discard changes	Databases		Retentions		Root folders		Schedules			Remote agents	Global rules			
E	dit				Setti	ngs				Archive	Remote	e agents			
		Orage Archive >		> Storage	s										
+	new	٩	manag	e access											
Sto	rage Name			Storage Type	e	l	default								



Storage repository		×
Storage settings		
Store name:	File Archive storage	
Store type:	Disk	
Path:	\\TACATEST\File Archive storage	
Use explicit credentials:		
Username:		
Password:		
Confirm password:		
Compression:	$\checkmark$	
	(Compresses all files larger than 4KB except already compressed formats like JPG, AVI, MP3 etc. This feature might slow down the store functionality, but can spare storage space.)	
Enable SnapLock:		
Use single instancing:		
	Only one instance of the physical file will be present on the store.	
Use file encryption:		
	Files will be stored in encrypted form. <u>Download</u> the encryption key and store on a safe place.	
Database connection:	File Archive DB 🔹 🤡	
Test	Save Cancel	

*Note*: Available storage types are listed in the Store type dropdown list. If you want to use another storage, refer to <u>this</u> chapter of the online guide.

Disk store allows to store further metadata in the database (option "Store metadata in DB"). By unchecking this field, it is possible to spare even more database space, if these metadata are redundant for the user. If an explicit user is not selected for this storage, then the contentACCESS service user is automatically used. The storage created first is set to default automatically.



### Setting the root folder(s)

The root folder(s) to be archived are configured on the <u>Root folders</u> page (*File Archive* tab  $\rightarrow$  *Settings* group  $\rightarrow$  *Root folders* button). Click + new to add a root folder and specify the required fields in the next window.

You will have to assign a database, storage and index zone to the root. Assign "File Archive DB" and "File Archive storage" created a few steps earlier and the default index zone.

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cturges settings     tot     cturges     cturges <th></th> <th></th>		
Root folders   File Archive > Settings > Root folders     + new • import     Path     User     Settings > Root folders     Path     Use explicit credentials:   Use explicit credentials:   User name:   Password:   Confirm Password:   Type of connection:   On-premise file server   Version:   Server:		
Root folders   File Archive > Settings > Root folders              • new          • import      Path      File Path     Path:     \[\TACATEST\Microsoft materials   Use explicit credentials:   Use explicit credentials:   User name:   Password:   Confirm Password:   Type of connection:   On-premise file server   Version:   Server:		
File Archive > Settings > Root folders          Image: Instrument of the setting and the setting		
• new • import     Reh ter     State     Image: State     Version:     On-premise file server     Version:     Server:		
Path User Store Database Uge or Type Version Agent		
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Path: \\TACATEST\Microsoft materials   Use explicit credentials: Use explicit credentials   User name:	×	
Use explicit credentials: User name: Password: Confirm Password: Type of connection: Version: Server:		
Use explicit credentials: User name: Password: Confirm Password: Type of connection: Version: Server:		
User name: Password: Confirm Password: Type of connection: Version: Server:		
Password:		
Confirm Password:       Type of connection:       Version:       Server:		
Type of connection:     On-premise file server       Version:     -       Server:     -		
Version:		
Version:		
Server:		
Test		
Test		
Database connection: File Archive DB 🔹 🗸		
Storage name: File Archive storage -		
Index zone: Default index zone -		
OK Cancel		

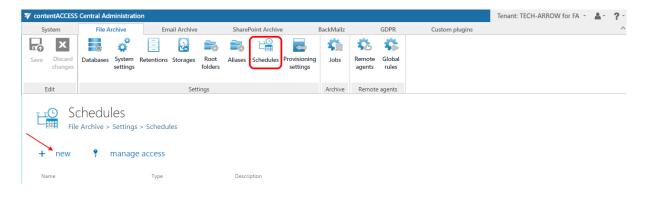


*Note*: The root folders define the start point of the archive process. The archive job that processes a root writes the data into the database and storage assigned to it. It is not recommended to change these settings later, as this may result in problems with the file retrieve. The relative file path can be set on the archive job's configuration page later.

The import option on the same page allows to import the list of root folders from a file. For more information about this feature, read <u>this</u> section of the online guide.

#### Creating the provisioning and archive schedulers

Create and configure 2 schedulers: one scheduler running every hour for the archive job; another scheduler running daily for the provisioning job. Open the Schedules page (*File archive* tab  $\rightarrow$  *Settings* group  $\rightarrow$  *Schedulers* button) and create them.





#### 1<sup>st</sup>: File archiving scheduler properties:

Click option **+new** on the **Schedules** page. In the next pop-up dialog, name your scheduler – "File archiving scheduler" in this use case. Select "Always run" and set the frequency to 60 minutes.

Add new scheduler			$\times$
Name	File archiving scheduler		
Туре	Always run	*	
Frequency in minutes	60	* *	
		OK	Cancel

#### 2<sup>nd</sup>: Provisioning scheduler properties:

Click **+new** on the **Schedules** page. Create a "Week schedule with repeat" scheduler with name "Provisioning scheduler". Fix the start time 1 AM – of the provisioning running in the week map. Check the **Run only once per interval** checkbox (we do not need to run the job multiple times in the interval).

Name	Prov	isioni	ing sc	hedu	ler						
Туре	Wee	k sch	edule	with	repe	eat				*	
Week schedule with repeat											
	0		6		1	2		18			
Monday											
Tuesday											
Wednesday											
Thursday											
Friday											
Saturday											
Sunday											
									[Cle	ar]	
Run only once per interval	$\checkmark$										
Running frequency in minutes	5										
Stop job on interval end											

#### Save your changes.



#### Configuring and running the File archive provisioning job

Open the <u>Provisioning settings</u> page (*File Archive* tab  $\rightarrow$  *Settings* group $\rightarrow$  *Provisioning settings* button).

To configure the File archive provisioning, the administrator is required to set

- 1. The role that will define the file archive user's permissions in contentWEB. Standard user role is available in the list by default, other roles with other permissions must be first configured on the **Roles** page.
- The time periods, when the provisioning will run this must be configured in section
   "Scheduling settings" in our case, we will use the "Provisioning scheduler"
- 3. The objects to be provisioned must be set in section "Provisionable objects"
- 4. Notification settings (optional)

Save your settings. If you do not want to wait until the scheduler starts the provisioning, start it manually by clicking on "Start immediately" in the blue status bar.

V contentACCESS	Central Administrat	ion						Tenant: TECH-AF	ROW for FA	<b>Å</b> *	? -
System	File Archive	Email Archive	Shar	ePoint Archive	BackMailz	GDPR	Custom plugins				^
Save Discard changes	Databases System settings		Root Aliase folders		isioning ttings	Remote agents					
Edit		Set	tings		Archive	Remote agents					
File	rovisioning Archive > Setting:	settings s > Provisioning sett	5	e auto refresh	• deac	tivate job	tal logs 💉 e	dit		*	•
Status: <b>Idle</b> Progress:				Provisionab				×			
Archive settings Mailbox owner re	ole: St	tandard user			synchronized, or you		ly provisioned. You can selec Directory container and syn				
Scheduling setti	ngs			Name: Provisionable objec		ontentACCESS group roup name	•	_			
Scheduled in:		rovisioning scheduler									
Provisionable of + new Name	<sub>ojects</sub> impor	rt <b>የ</b> mana	age access fo	The object was Test	s found in Active Direc	tory.					
		No data to displa	у				Save	Cancel	(i) Online help	•	•

*Note:* The provisioning job synchronizes the Active Directory with contentACCESS. The provisioned object (this may be a group or LDAP path in the Active Directory) will automatically get log on rights to the <u>contentWEB</u> File Archive and can view its associated archive folders.



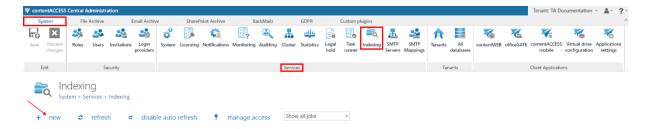
Provisionable objects can be also imported from files using the "import" option on the same page. contentWEB access right for a single user can be granted using the "manage access" option. For more information, refer to the online guide <u>here</u>.

Now, you can create a File archive job.

### **Creating a Content indexing job**

Now we create a **Content indexing** job, which will assign the selected index zone to emails of the selected entities.

a) On the page of Indexing (System → Services → Indexing) click on + new option under Indexing.



b) Name the indexing job (in our case, FileArchive indexing) and select the node it will run on.
 Click on Add. When the system asks if you would like to configure this instance now, select Yes.

Add new job	instance		×
Run on node:	Any available		<b>.</b>
Display name:	FileArchive indexing		
		Add	Cancel

The administrator must configure these sections on the job's configuration page:

- c) Scheduling settings run every 5 minutes
- d) Resource settings specify the number "4"

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- e) Filtering settings set here the file types that should and shouldn't be processed
- f) Entities to index select the entities that will be processed by the job (in our case the EmailArchive group)
- **g)** Index zone settings set the index zone that will be assigned to items by the indexing job (in our case, we will use the default one)
- h) Notification settings you can set where and when to send emails about the potential errors

ኛ conte	ntACCESS	Central A	Administr	ration																	1	fenant: TECH-Al	ROW for FA	🛔 - 🤶
Sys	em	File	e Archive		Email Archiv	e	ShareP	oint Archive	E	lackMailz		GDPR		Custom p	lugins									
Fo	X Discard	3	2	2	Login	Ŷ	3	<b>\$</b> 1	2	٩	*	<u>ullu</u>	Legal	Task	<u> </u>	SMTP	SMTP	A	All	7	R	contentACCESS	1	~
Save	changes	Roles	Users	Invitations	providers	System	Licensing	Notifications	Monitoring	Auditing	Cluster	Statistics	hold	runner	Indexing		Mappings	Tenants	databases	contentWE	5 officeGALE	mobile	configuration	settings
Ec	it		S	ecurity							Service	es						Te	enants			Client Application	ons	
				index Indexing		ive indexi	ing																	
Status		mmedia	ately	C r	efresh	đ	disable	auto refres	h C	deac	tivate j	ob	ы ю	gs	🖍 ed	lit								*
Progr																								
	iling settin	ngs		Every 5 min	utor			*																
	ce setting	15		Every 5 min	utes																			
	r thread co			4				\$																
Filteri	ig settings	s																						_
White	listed file t	ypes:		Process	ONLY the se	lected file t	ypes	Select file	e types															
Black	isted file ty	/pes:		DO NOT	process the	selected fi	le types	Select file	e types															
Entitie	s to index																							
-	selec	ct																						
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#### Creating a File archive job on the Jobs page

Open the <u>Jobs</u> page (*File Archive* tab  $\rightarrow$  *Archive* group  $\rightarrow$  *Jobs* button) and click on + new.

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10	×	-	¢°		2				-	s.	\$2	5					
Save	Discard changes	Databases	System settings	Retentions	Storages	Root folders	Aliases	Schedules	Provisioning settings	Jobs	Remote agents	Global rules					
E	dit				Set	ings				Archive	Remote	e agents					
Jobs File Archive > Archive > Jobs																	
+	new	2	refresh	¢	disable	e auto r	efresh	Y	manage	access	Show	all jobs	-				
ID	Display I	Name		Гуре 💡	Status 📍	Last Sta	rt	Last Duration	n Progre	s Summar	у	N	lext Start Is active	Cluster node 🦷	Running on		
								No	data to disp	lay							

Name your job in the next dialog and click on "Add". The application will prompt you to configure this newly created job immediately. Answer OK.

Add new jo	b instance	×
Available jobs:	File system archive	
Run on node:	Any available	
Display name:	File archive Best practices	
Description:	Plugin for File system archiving.	
	Add Cancel	
tacatest:3333 s	ays	
Would you like to	o configure this instance now?	
	ОК Сало	el
	OK	cel

#### File archive job configuration

By clicking "OK" one step earlier, the job configuration page opens. Configure the storage, database, folder(s) to archive etc. Set the filters and select the archive method that should be applied. Our File archive job will archive documents older than 1 year on our share <u>\\TACATEST\Microsoft materials</u>. Archived documents will be replaced with shortcuts to save space.



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Sy	stem	File A	Archive	Em	ail Archive	1.	SharePo	int Archiv	/e	BackMailz		GDPR	Custom plugins			~
Save	Discard changes	Databases	System settings	Retentions	Storages	Root folders	Schedules	Aliases	Provisioning settings	<b>پڑچ</b> Jobs	Remote agents	Global rules				
E	dit				Set	tings				Archive	Remote	agents				
				Best p > Jobs > F			ractices									*
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a) Repo	rt mode se	ttings														
	eport mode			]												
b) Sche	luling setti	ngs														•
Sche	duled in:		F	ile archiving s	cheduler			*								
C) Rete	ntion settin	gs														- 11
Rete	ntion:		1	0 years				*								
d) Shor	tcut setting	s														
	tcut process		C	reate shortcu	t from orig	inal item		*								
	al drive serv								Use default (tae	atest.ta.inter	nal)					
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e) Folde	ers to proce	ISS														
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f) Exclu	de folders															-
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Pa	ttern															
					1	No data to	display									

#### **Configuration details:**

- a) Report mode settings: In this case, we can skip this section.
- b) **Scheduling settings**: Set the configured "File archiving scheduler" scheduler that will start your job every hour, as defined.
- c) Retention settings: Set the configured "10 years" retention.
- d) Shortcut settings: Open the dropdown list and select option "Create shortcut from original item" and specify the virtual drive server name. Virtual drive is used to retrieve the original item(s) from the shortcut(s). Test the connection with the virtual drive server.



e) Folders to process: Specify the folder(s) to process manually or import the list from a file. Now, we will specify it manually, so we click **+new**. Select the configured root folder from the first dropdown list and enter the relative folder path if the archive job should start from a lower level. In this use case, the <u>\\TACATEST\Microsoft materials</u> share will be archived. Test the connection and click "OK".

Folder to process		×
Root \\TACATEST\Microsoft materials	Relative path	
Test		
	OK	Cancel

f) Exclude folder: If there are any folders that shouldn't be archived, exclude them from the process using this option. As we do not have such excludable folders in this use case, we skip these settings.

f) Filtering settings		
Filter: (Creation date older than	"1 years(s)")	
Change filter		
g) Notification settings		
Send when:	Never	
Recipient list:	john.doe@example.com,peter.white@example.com,	
Notify if version count reaches:	50 \$	
h) Resource settings		
Worker thread count:	2	
		① Online help

g) **Filtering settings:** Use this option to set any filters that must be used. In this use case, we will archive everything older than 1 year. Click on the "Change filter" button and set the required time period in the next dialog:

		tecl			
ter s	settings				
				visual	text
A N	Creation date	<ul> <li>Older than</li> </ul>	▼ 1Y		
D	+add group +add	condition			
				OK	Cancel

- h) **Notification settings:** If you want to get notification emails about any errors or warning that might occur due to any misconfigurations, you can set it here. Now, we skip these settings.
- i) Resource settings: already set to the recommended value

For more information about these settings, refer to the online guide <u>here</u>. Now, the job configuration is ready. Save your settings in the top left corner of the user interface. Wait until the scheduler starts the job in the next hour or start it manually by clicking on "start immediately" in the blue status bar:

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Save	Discard changes	File Ar	¢	Retentions	Storages	Root folders	SharePo	Aliases	Provisioning settings	BackMailz Sobs	Remote agents	GDPR Global rules	Custom plugins			
	<sub>dit</sub> Fi	le arch	nive I	Best p	sett ractic	-				Archive	Remote	e agents				ŕ
	File	Archive >	Archive	> Jobs > F	ile archiv	e Best p	ractices disable a	uto refi	resh	🗢 dead	ctivate jo	ob	ul logs 💉 edit		*	
	s: <b>Idle</b>		.,													

Now, we will check the "File archive job" events to see if everything has run properly. Open the **Monitoring** page (*System*  $\rightarrow$  *Services*  $\rightarrow$  *Monitoring*) using the "logs" option in the job's header bar. Under "Events", you can see the job has finished the task successfully. Use the **Export** function to export the events into an HTML, XML or CSV file if desired:

System	File Archive	E	mail Archive											
			nall Archive			nt Archiv	e	BackMailz		GDPR	Custom plug	ins		
		-	2	2	E		-	5 <b>1</b>	\$3	<b>\$</b>				
e Discard changes	Databases System settings		s Storages	Root folders	Schedules	Aliases	Provisioning settings	Jobs	Remote agents	Global rules				
Edit			Sett	tings				Archive	Remot	e agents				
tration	onitoring em > Services > 1	Jobs:	Best practic	295	Start	Date:		End Date:		Event (All e		* Export	Settinas	
uns # Start	t date	* End	d date		Dur	ation		S≈≫	Events: Ru	n is 'File archiv	st practices 9/20/	2019 2:45:37 PM'	dol	
	ive Best practices	- En	adate		Dun	adon					Plugin was	Description	,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	
	09/2019 14:45:37	20/	/09/2019 14:	45:43	5 se	conds			Э 🚺	20/09/2019 14:45:43	finished successfully	Plugin.FSArchive	File archive Best	practice
	09/2019 14:43:26 09/2019 14:42:22		/09/2019 14: /09/2019 14:			conds			Ð 🚺	20/09/2019 14:45:43	Folder processing information	Processing was finished	File archive Best	practice
	09/2019 14:37:28 09/2019 14:33:10		/09/2019 14: /09/2019 14:			conds			Э 🚺	20/09/2019 14:45:37	Processing was started	Plugin.FSArchive	File archive Best p	oractice
									∋ <b>i</b>	20/09/2019 14:45:38	Folder processing information	Processing was started. Number roots: 1.	r of File archive Best p	oractice
Page 1 of 1 (6 ite	tems) 🕢 1	$\triangleright$							Page 1	of 1 (5 items)	() 1 ()			

Access your archived files using the shortcuts (screenshot A) or search in the archive using the virtual drive (screenshot B). You can also view your archived files in <u>contentWEB</u>. Enjoy it ③

**techarrow** 

#### Date modified Size Name Туре 10-crucial-security-tips-to-reduce-data-l... 5/19/2017 3:26 PM Shortcut 2 KB 🔊 a-1024x768.jpg 3/28/2017 3:42 PM 2 KB Shortcut 🔝 ai-email.jpg 2/22/2017 3:26 PM Shortcut 2 KB 💫 cloud.mail\_.jpg 2/7/2017 2:40 PM Shortcut 2 KB 5/15/2017 3:50 PM 🏂 microsoft\_patch.png Shortcut 2 KB 📰 microsoft-building.jpg 3/10/2017 3:16 PM Shortcut 2 KB 📷 microsoft-e1452011064246.jpg 7/12/2017 3:29 PM Shortcut 2 KB 2 KB 🔝 microsoft-european-union.jpg 4/25/2017 3:08 PM Shortcut 📷 microsoft-office-365-logo-100630074-pr... 2 KB 2/17/2017 3:02 PM Shortcut 📰 microsoft-office-365-logo-100684405-la... 1/24/2017 12:55 PM Shortcut 2 KB 💦 Microsoft-OneDrive-logo-official-1-696x... 2/23/2017 1:58 PM 2 KB Shortcut 🛼 MS\_cloud.jpg 3/21/2017 4:19 PM Shortcut 2 KB 🔝 ms-office.jpg 4/11/2017 2:24 PM Shortcut 2 KB office-101-badge.png 3/17/2017 2:10 PM Shortcut 2 KB 📷 office-365-1024x640.jpg 2/28/2017 2:34 PM Shortcut 2 KB 🔝 office365-box-1024x1024.jpg 2/3/2017 2:01 PM Shortcut 2 KB

Screenshot A

Name	Date modified	Туре	Size
돌 10-crucial-security-tips-to-reduce-data-l	5/19/2017 3:26 PM	JPEG image	41 KB
🔄 a-1024x768.jpg	3/28/2017 3:42 PM	JPEG image	67 KB
🔄 ai-email.jpg	2/22/2017 3:26 PM	JPEG image	127 KB
🔄 cloud.mailjpg	2/7/2017 2:40 PM	JPEG image	16 KB
尾 microsoft_patch.png	5/15/2017 3:50 PM	PNG image	62 KB
N microsoft-building.jpg	3/10/2017 3:16 PM	JPEG image	37 KB
N microsoft-e1452011064246.jpg	7/12/2017 3:29 PM	JPEG image	231 KB
🔄 microsoft-european-union.jpg	4/25/2017 3:08 PM	JPEG image	71 KB
N microsoft-office-365-logo-100630074-pr	2/17/2017 3:02 PM	JPEG image	10 KB
N microsoft-office-365-logo-100684405-la	1/24/2017 12:55 PM	JPEG image	22 KB
Nicrosoft-OneDrive-logo-official-1-696x	2/23/2017 1:58 PM	JPEG image	14 KB
Scloud.jpg	3/21/2017 4:19 PM	JPEG image	81 KB
🔤 ms-office.jpg	4/11/2017 2:24 PM	JPEG image	22 KB
尾 office-101-badge.png	3/17/2017 2:10 PM	PNG image	5 KB
S office-365-1024x640.jpg	2/28/2017 2:34 PM	JPEG image	28 KB
S office365-box-1024x1024.jpg	2/3/2017 2:01 PM	JPEG image	60 KB

#### Screenshot B