



# EMAIL ARCHIVE BEST PRACTICES

in

contentACCESS version 5.1



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## Use case: Email Archive configuration for companies with up to 2,000 mailboxes

This document gives you an overview about how to configure Email archive for the company that is similar to the company in this use case.

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

### What is contentACCESS?

contentACCESS is an information management platform for migration, collaboration, access, and transformation of data from different sources, any time, from any device.

### USE CASE

|  |   |
|--|---|
| <b>Goal:</b>                           | <b>TECH-ARROW's mailbox archive</b>   |
| <b>Company size:</b>                   | up to 2,000 mailboxes   |
| <b>Exchange server:</b>                | Exchange 2010 SP2 in this use case (possible to configure also O365)  |
| <b>Group to be archived:</b>           | Archiving   |
| <b>Message classes to be archived:</b> | Mails, Documents  |
| <b>Archiving method:</b>               | HTML shortcut   |
| <b>contentACCESS single server:</b>    | tacatest  |
| <b>contentACCESS server</b>            |   |
| <b>externally accessible over:</b>     | <a href="https://tacatest.ta.internal">https://tacatest.ta.internal</a> (to be configured in FQDN settings) |
| <b>CPU:</b>                            | 2.4 GHz quadcore  |
| <b>Memory:</b>                         | 24 GB   |
| <b>Storage:</b>                        | single disk store   |
| <b>Database:</b>                       | single database   |
| <b>Retention time:</b>                 | 10 years  |
| <b>Scheduler:</b>                      | Provisioning job running at Saturday from 10 PM;  |



**Monitoring feature:**

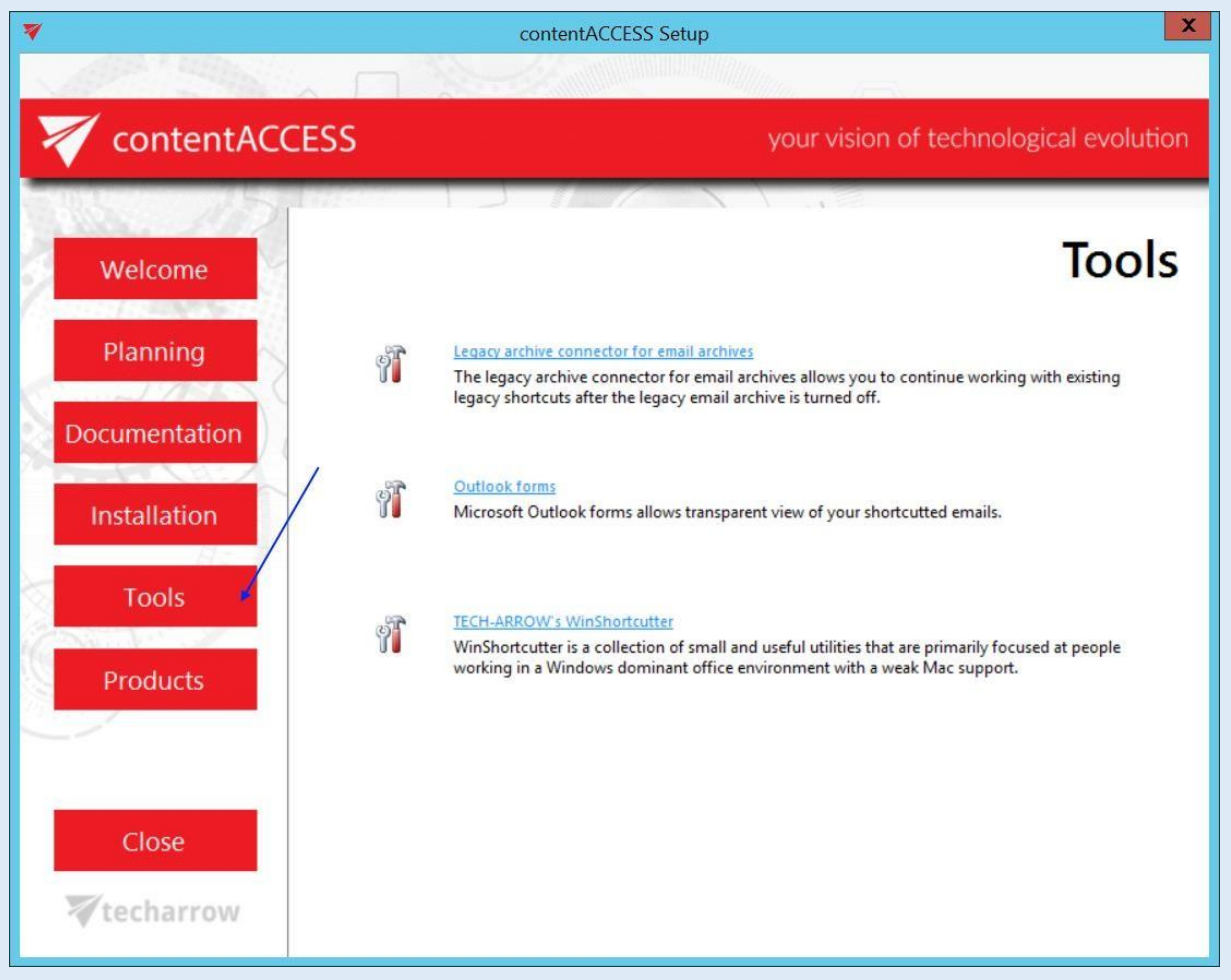
Email archive process running every day from 6 PM

Troubleshooting of potential system and job related misconfiguration.

## Installing contentACCESS

**Install contentACCESS (server, central administration, and contentWEB)** on a single server (in our case, *tacatest*) and navigate to the *Central administration* configuration interface of the software (for more details, refer to the [contentACCESS Manual](#)). Log in with the system user credentials. During the installation, assign 12GB of memory to the Elastic search server.

**Note:** It is also recommended to install proxy server over HTTPS (secure) connection and to publish contentACCESS Outlook forms in MS Outlook (to ensure HTML shortcut transparency). Outlook forms are accessible in the **Tools** part of the contentACCESS setup package.





## External accessibility settings

Navigate to **System** ➤ **Services** ➤ **System**, configure the **Resource storage** and specify fully qualified domain name (FQDN) under **External accessibility settings** – in this use case, <https://tacatest.ta.internal>, otherwise the links in the HTML shortcuts will not work.



**contentACCESS Central Administration**

System

File Archive

Email Archive

BackMailz

SharePoint Archive

GDPR

Save

Discard changes

Roles

Users

Invitations

Login providers

System

Licensing

Notifications

Monitoring

Auditing

Cluster

Statistic

Edit

Security

Services

System

System > Services > System

General settings

Is system configured: ☒

Plugins directory: C:\Program Files\TECH-ARROW\contentACCESS\GA

Globalization settings

Time zone: (UTC) Coordinated Universal Time

Date format: 31/01/2019 5:50:50 (24h)

User search settings

Disable user searching: ☐

Tenant level resource settings

Disable resource settings: ☐

Resource storage settings

Storage path: C:\TestingStorage

Use explicit credentials: ☐

User name:

Password:

Confirm password:

Test

Database settings

Database type: MSSQL

Server name: TACATEST

Database: MNEtestDB

Schema: dbo

User: sa

Configure ...

Proxy settings

☒ Do not use proxy

☐ Use system default proxy settings

☐ Use explicit proxy server settings

Proxy server URL:

Username:

Password:

Search server settings

Search server url: net.tcp :// localhost : 8732

Test

Monitoring log storage settings

☒ Use the system database

☐ Use the default search server

☐ Use a different search server

External accessibility settings

Retrieve server FQDN: https :// tacatest.ta.internal : 443

Enter an externally accessible alias for the contentACCESS server. This value is used for shortcut links too.

Test

Enable link security: ☒

Central login: http :// tacatest.ta.internal : 80

Provide necessary information, where central login is deployed.

Test



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TECH-ARROW, a. s. | Kazanská 5B, 821 06 Bratislava, Slovakia, EU | E-mail: [sales@tech-arrow.com](mailto:sales@tech-arrow.com) | [www.tech-arrow.com](http://www.tech-arrow.com)





In case you are using online Exchange server, the Lightweight Directory Access Protocol (LDAP) settings do not need to be configured. If you are using an on-premise Exchange server and in all other cases, the LDAP settings need to be filled in, too. For LDAP settings, navigate to **System -> Services -> System** and configure it under the *Active directory integration settings*.

The screenshot shows the 'contentACCESS Central Administration' interface. The top navigation bar includes 'System', 'File Archive', 'Email Archive', 'BackMailz', 'SharePoint Archive', and 'GDPR'. The 'System' menu is expanded, showing 'Roles', 'Users', 'Invitations', 'Login providers', and 'System' (highlighted with a red box). The 'Services' menu is also expanded, showing 'Licensing', 'Notifications', 'Monitoring', 'Auditing', 'Cluster', 'Statistics', and 'Legal hold'. The 'System' menu item is highlighted with a red box. Below the navigation bar, the 'Central login' section is visible, with a 'Test' button. The 'Active Directory integration settings' section is highlighted with a red arrow. It contains the following fields:

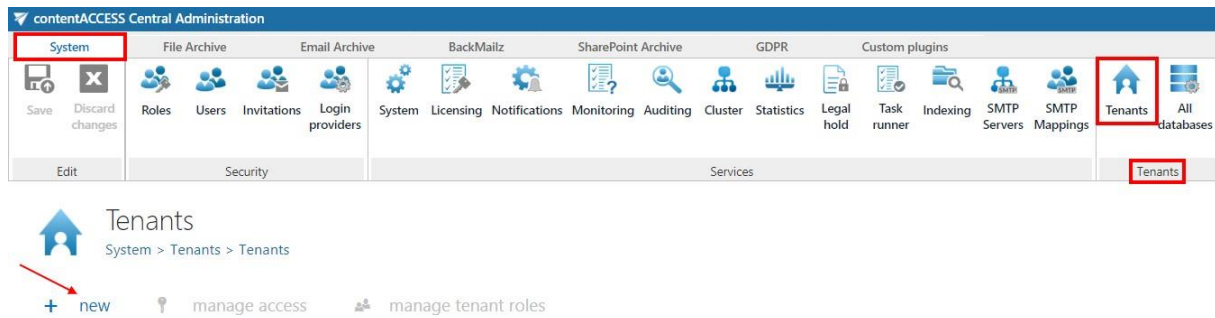
- LDAP Server name: LDAP://192.168.190.91
- Authentication type: None
- ☒ Use explicit credentials
- User name: ta\administrator
- Password: (empty field)
- Confirm password: (empty field)

A 'Test' button is located at the bottom of the 'Active Directory integration settings' section.

## 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 **Tenants** page (**System -> Tenants -> Tenants**) and click **+ new. Add and Configure** a new tenant & tenant administrator into the system.



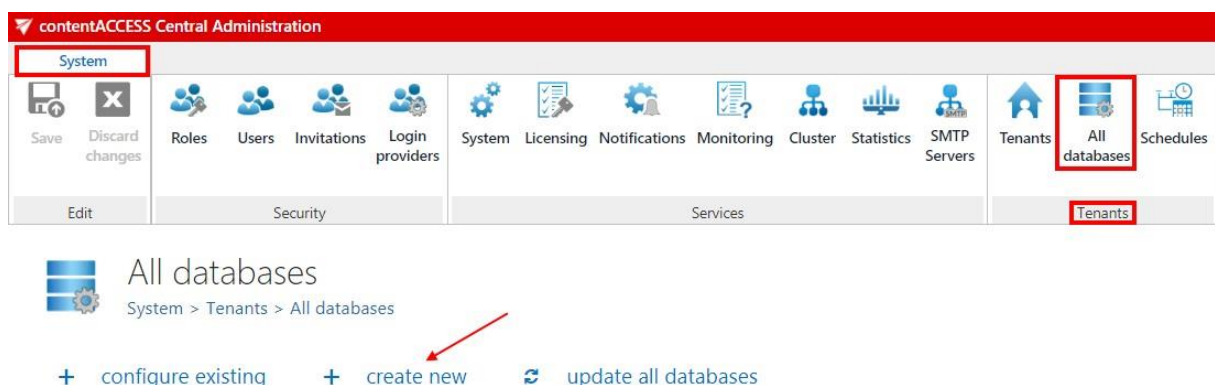
The newly created tenant appears in the upper right corner of the **Central Administration** user interface, like on the picture below:



**Note:** If you want to read the detailed description of tenant creation and configuration, please, check [this](#) section of our online documentation.

## Creating a database to your tenant

Open page **All databases (System ➤ Tenants ➤ All databases)**, click **+ create new** and **enter** required values in the **Database repository** window. Create a single SQL database to TECH- ARROW tenant with connection name "Email Archive DB" and Database user "Administrator". We won't use the system database server (TACATEST) as it is recommended to use a separate one, so we leave the "Use system database server (TACATEST)" checkbox unchecked. The application will automatically set this first created database to default.



Database repository

Connection name:

Email Archive DB

☐ Use system database server (TACATEST)
 

Type:

MSSQL

Server name:

TACATEST

Database:

Email Archive DB

Schema:

dbo

Database user

☒ Use explicit user
 

New or existing user:

Administrator

Password:

.....

Confirm password:

.....

Generate user and password

Connect with user

☐ Use explicit credentials
 

User:

Password:

Confirm password:

Test database connection

Tenant:

TA Documentation

Save

Cancel

### **Configuration details**

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

**Option “Use system database server”:** if the database must be created on the system database server, 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, 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:

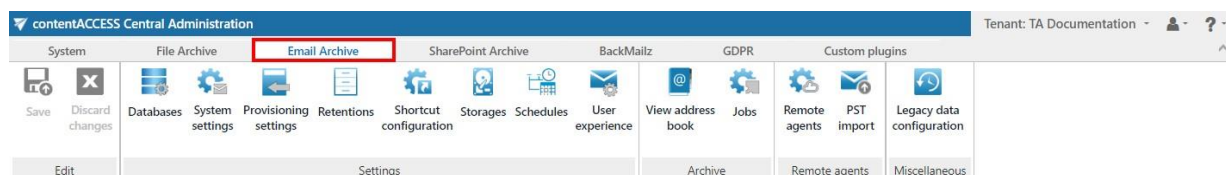
**Use explicit credentials:** if this checkbox is not checked, then contentACCESS will automatically connect to the database (MSSQL) under the contentACCESS service account. If you wish to connect with an explicit user, then specify an admin user with the rights to create a new database on the database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

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

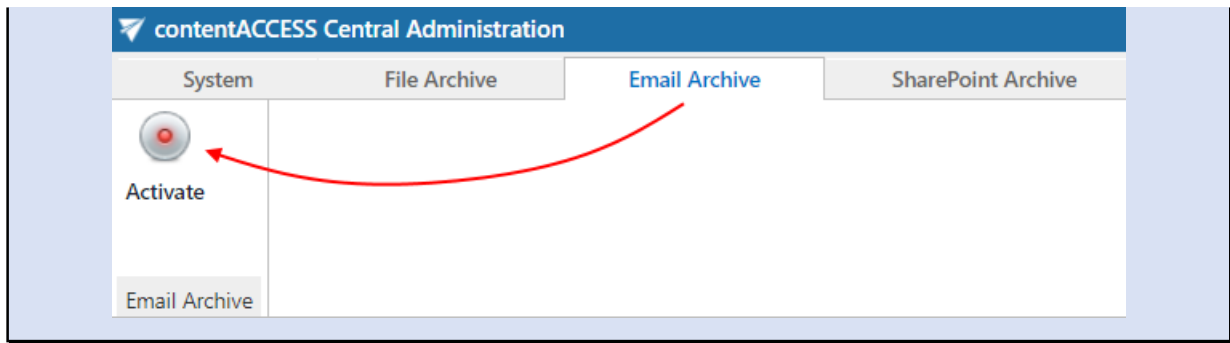
**Note:** When creating databases, always consider the size of the company and the number of mailboxes archived. For bigger companies with a high number of mailboxes (more than 2,000), it is always recommended to create separate databases, e.g., one for the store and one for the email archive to ensure the transparency of processes. The database created at first will be the default database. This option is configurable on the page of **Databases** using

## Email Archive settings

**Navigate** to the **Email Archive** tab on the ribbon.



**Note:** When opening the **Email archive** tab for the first time, you will have to activate Email Archive by clicking on the **Activate** button. With this action, a provisioning job will be automatically created.



## System settings configuration

Open the **System setting** page (by navigating to **Email Archive** ➤ **Settings** ➤ **System settings** on the ribbon) and fill in: a) "Email Archive DB" under "Database settings", b) "On-premise" under "EWS settings", check the "Keep connection alive" option, and c) set the global exclude rules of email archiving in section "Message class handling". Now, we exclude everything, except "Mails" and "Documents".

**Important:** The user specified in *Email Archive* → *System settings* → *EWS Settings* must have full access to the mailbox(es) to be archived and must have "View-Only Organization Management" rights on the Exchange. If Mail app will be also used, then *Organization management rights* are required.

**Important:** In case of **custom Exchange solution(s)** used for emails, the **custom email properties will not be archived!** The recommended solution: do not archive these emails and/or use the exclude feature for these custom message classes.

It is also important to remember the *Message class handling* settings configured on *System settings page* always take priority over the Exclude settings of the Email archiving job.



contentACCESS Central Administration

| System                  | File Archive                 | Email Archive                       | SharePoint Archive                 | BackMailz                    | GDPR                      | Custom plugins   |
|-------------------------|------------------------------|-------------------------------------|------------------------------------|------------------------------|---------------------------|--|
| Save<br>Discard changes | Databases<br>System settings | Provisioning settings<br>Retentions | Shortcut configuration<br>Storages | Schedules<br>User experience | View address book<br>Jobs | Remote agents<br>PST import<br>Legacy data configuration |
| Edit                    |                              | Settings                            |                                    | Archive                      | Remote agents             | Miscellaneous  |



## System settings

Email Archive > Settings > System settings

### a) Database settings

Database connection:

### b) EWS settings

|  |   |
|--|---|
| Exchange server type:  | <input type="text" value="On-premise"/>                                   |
| Exchange server interface version:                           | <input type="text" value="Exchange 2010 SP2"/>                            |
| EWS Uri:   | <input type="text" value="https://tadc01.ta.internal/EWS/Exchange.asmx"/> |
| PowerShell Uri:  | <input type="text" value="https://tadc01.ta.internal/PowerShell"/>        |
| PowerShell auth:   | <input type="text" value="Basic"/>  |
| Max connection count:  | <input type="text" value="3"/>  |
| Ignore SSL errors:   | <input checked="" type="checkbox"/>                                       |
| Keep connection alive:                                       | <input checked="" type="checkbox"/>                                       |
| <input checked="" type="checkbox"/> Use explicit credentials |   |
| User name:   | <input type="text" value="administrator@ta.internal"/>                    |
|  | <small>administrator@domain.com or domain\administrator</small>           |
| Password:  | <input type="password" value="*****"/>                                    |
| Confirm password:  | <input type="password" value="*****"/>                                    |
| <input type="button" value="Test connection"/>               |   |

### Hybrid Exchange settings

☐ Use hybrid Exchange environment

### General settings

|                                  |  |
|----------------------------------|--|
| Use forest wide queries:         | <input type="checkbox"/>               |
| Allow to re-link mailboxes:      | <input type="checkbox"/>               |
| Allow to archive public folders: | <input type="checkbox"/>               |
| Public folder access:            | <input type="text"/>                   |
| Retention reference date:        | <input type="text" value="Sent date"/> |

### c) Message class handling

Exclude message classes: ☐ Mails ☒ Posts ☐ Documents ☒ Appointments ☒ Contacts ☒ Distribution list ☒ Tasks ☒ Reports

Exclude custom message classes:

Custom message classes

No data to display

Shortcutting of non-email types:

Allow or disable shortcut creation for non email items like appointment, contact, task, post. The exact shortcut configuration is taken from job settings.

**a) Database settings.** Here, the database will be selected, which will be used by the provisioning job. The provisioning job will store the metadata (mailbox permissions, group memberships, etc.) during the synchronization process.



**b) EWS Settings.** Under **Exchange server type** and **Exchange server interface version**, select the type and version of the Exchange server, where your email provider is running. Then, enter the **EWS URL**, **PowerShell URL**, and the **PowerShell authentication**. These data must be requested from the email provider you use. The maximum count of connection-attempts can be determined under **Max. connection count** option.

**Note:** It is possible to configure O365 connection here. If you select O365 from the **Exchange server type** dropdown list, **Exchange server interface version**, **EWS URL**, **PowerShell URL**, and the **PowerShell authentication** will be automatically pre-filled.

It is also possible to disregard any SSL errors by checking the checkbox **Ignore SSL errors**.

**Keep connection alive:** If it is turned on, then the connection between contentACCESS and the Exchange server is cached, which increases the performance.

- **If you are communicating with one Exchange server: turn it on** to increase performance.
- **If you have a load balanced Exchange environment** and there are **communication problems** with the Exchange: it is recommended to **turn it off**.

Enter the **User name** and **Password** for explicit credentials or log in under service-credentials and run a test connection via **Test** button.

**c) Message class handling.** This feature can be useful for companies with a policy that certain message classes, e.g., Contacts, Tasks etc. mustn't be archived. Here, you can also exclude custom message classes, e.g., if your company already has emails archived by a product from another company, then you can exclude these already archived emails from the re- archiving process.

## Adjusting retentions

Open the **Retentions** page (**Email Archive** ➤ **Settings** ➤ **Retentions**) and **configure the number of storing the archived item to 10 years**. Click on **+ new** and the "Retention repository" window opens. Name your retention ("10 years") and specify the retention time

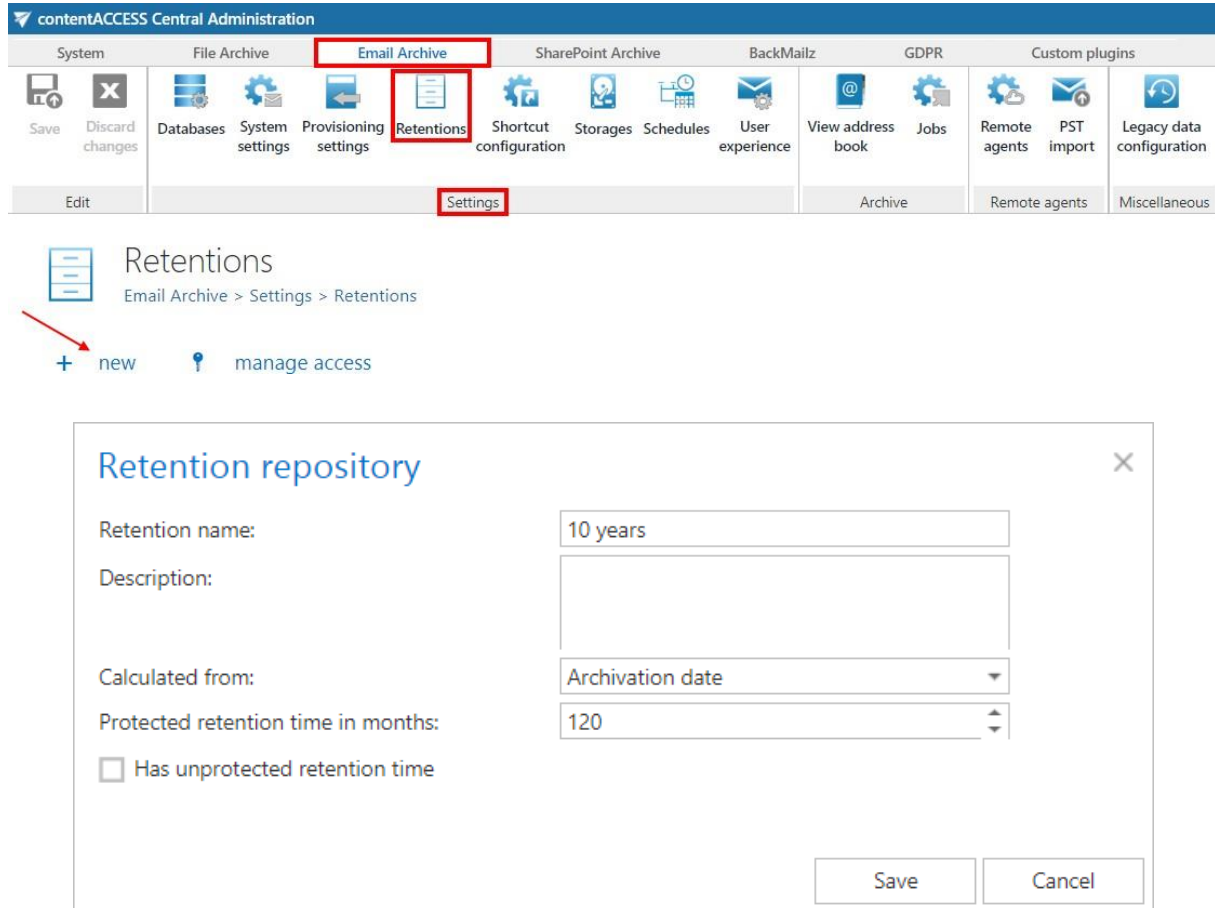


in months (120).

**Note:** During this retention time, the archived items will not be deleted from the selected storage. The first created retention will be automatically set to default. This option is



**Retentions** page, using the given retention's context menu. Default retentions are used by the Mail app and OWA integration (by archiving/restoring from the mailbox directly). For more information, refer to the online guide [here](#).



The screenshot shows the 'contentACCESS Central Administration' interface. The 'Email Archive' tab is selected, and the 'Retentions' sub-tab is highlighted. Below the navigation bar, the 'Retentions' page is displayed with a breadcrumb 'Email Archive > Settings > Retentions'. A red arrow points to the '+ new' button. A modal window titled 'Retention repository' is open, showing fields for 'Retention name' (10 years), 'Description', 'Calculated from' (Archivation date), and 'Protected retention time in months' (120). There is a checkbox for 'Has unprotected retention time' and 'Save' and 'Cancel' buttons at the bottom.

## HTML shortcut configuration

Open the Shortcut configuration page (**Email Archive** ➤ **Settings** ➤ **Shortcut configuration**). In the section HTML Templates, click **+ new** to create a default HTML template file. Name this HTML "Default" (Screenshot A). Then click **+ new** option under the breadcrumbs, and according to Screenshot B, create an HTML shortcut with name "Shortcut HTML". In the repository window, select the "Default" template you created a while ago.

If you check the **Keep formatted body** checkbox, the original HTML body won't be converted to plain text during the shortcut creation, but the system will try to inject the attachment links



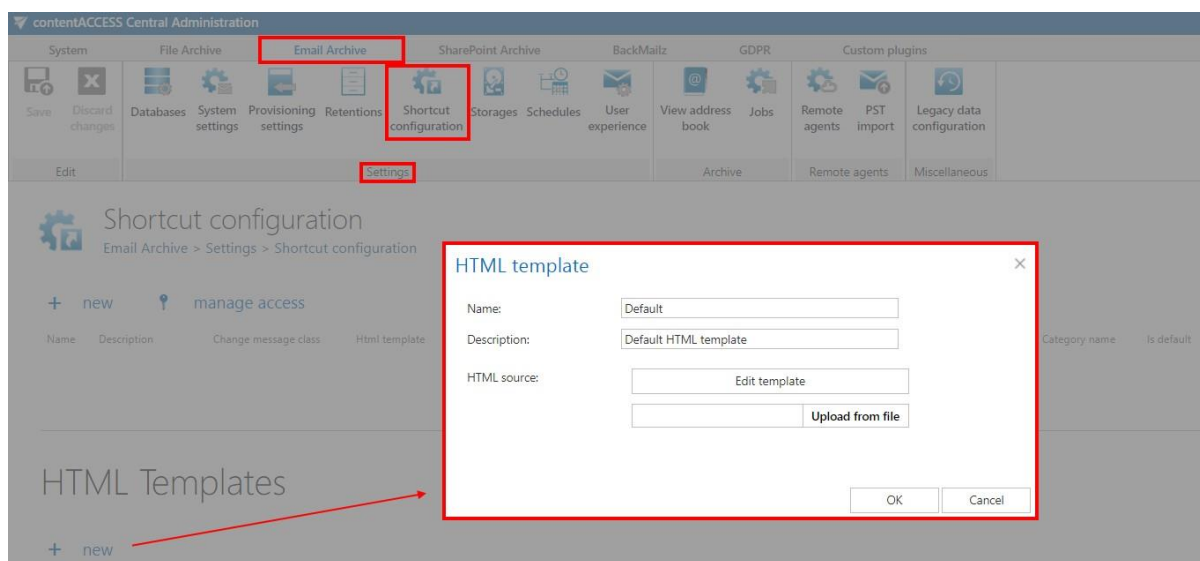
into the existing message body. A template, which supports this formatting option, must be selected.



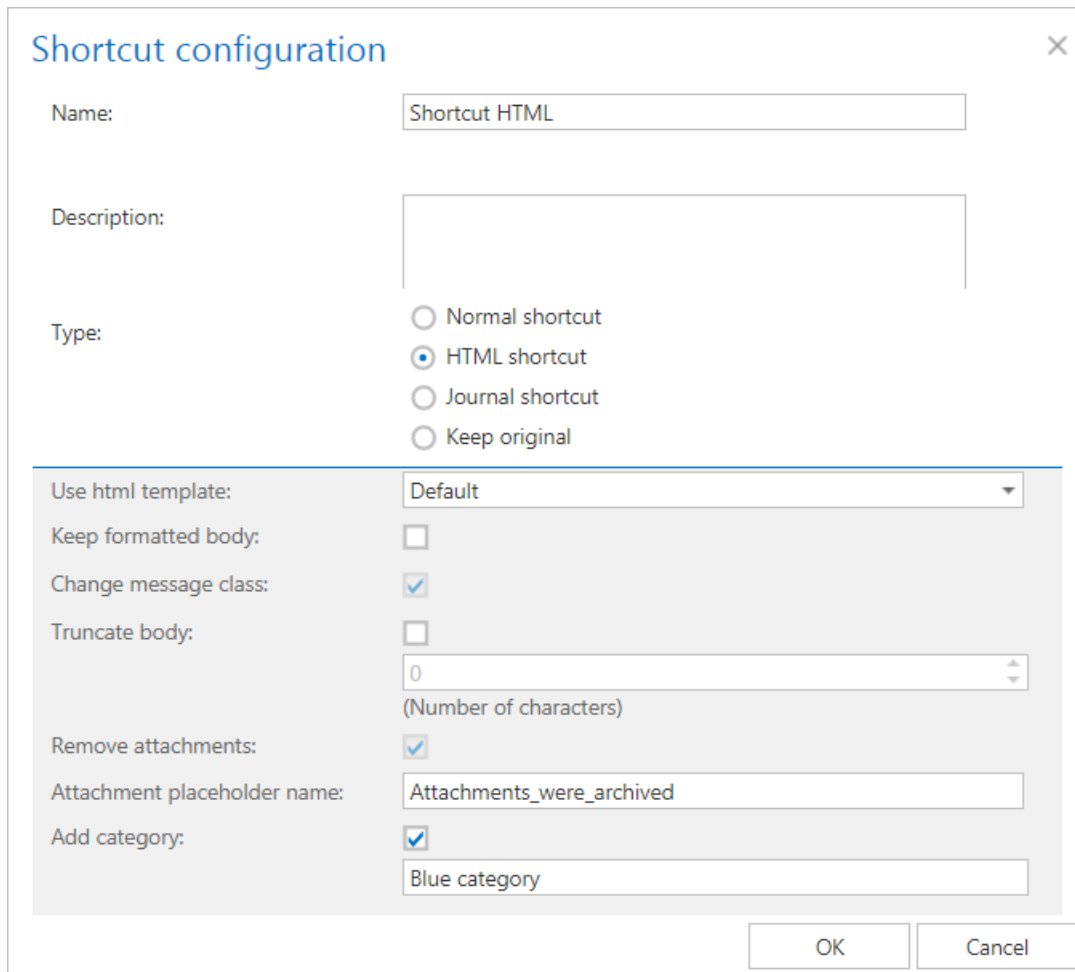
It will also become possible to keep inline attachments in the mail body by checking the **Keep inline attachments** checkbox.

The **Remove attachments** checkbox is checked by default for HTML shortcuts. Removed attachments can be later retrieved by double clicking on the archived email in the compose window. It is also possible to specify here the **Attachment placeholder name**.

If you want a category to be added to the archived emails, check the **Add category** checkbox and type the name of the category into the textbox.



Screenshot A



Screenshot B

contentACCESS uses shortcuts to retrieve the archived items. It is recommended to use **HTML shortcut** instead of **Normal shortcut**. Normal shortcut works only in MS Outlook if contentACCESS Outlook forms are installed. The HTML shortcut will work with MS Outlook and OWA. If HTML shortcut is used, then the archived email message and the attachment are accessible using the links in the HTML. The archived emails will be marked with the category you select under 'Add category' option. Thanks to the **Remove attachments** option, the attachments will be stored separately from the body of the email message.

The shortcut created, at first, is automatically set to default. Default shortcut is used by manual archiving by the Mail app and OWA integration. The option is configurable on the **Shortcut configuration** page using the context menu.

The HTML Templates are free for editing. The size of a HTML-template cannot exceed **32 kB**; for this reason, it is not recommended to use MS Word for editing HTML templates.



## Creating a disk store with name "Email Archive store"

Open the **Storages** page (**Email archive** ➤ **Settings** ➤ **Storages**), click **+ new** and fill the values in the "Storage repository" window. Name it ("Email Archive store"), select the "Disk" type store, and fill in the path: "C:\DiskStoreTA\EmailArchive". By checking the **Compression** checkbox, all files larger than 4 kilobytes will be compressed, except of already compressed file formats such as JPG, MP3 etc. If you wish to keep only one copy of the physical file in the store, check the **Use single instancing** checkbox. **Compression** and **Single instancing** can spare a lot of space in the database. Under Database connection, select single "Email Archive DB" that we created in Step 4 above.

contentACCESS Central Administration

System | File Archive | **Email Archive** | SharePoint Archive | BackMailz | GDPR | Custom plugins

Save | Discard changes | Databases | System settings | Provisioning settings | Retentions | Shortcut configuration | **Storages** | Schedules | User experience | View address book | Jobs | Remote agents | PST import | Legacy data configuration

Edit

**Storages**  
Email Archive > Settings > Storages

+ new | manage access

Storage Name | Storage Type | No data to display

**Storage repository**

Storage settings

Store name: Email Archive store

Store type: Disk

Path: C:\DiskStoreTA\EmailArchive

Use explicit credentials: ☐

Username:

Password:

Confirm password:

Compression: ☒  
(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.  
[Download](#) the encryption key and store on a safe place.

Database connection: Email Archive DB ☒

Connection successful!

Test | Save | Cancel



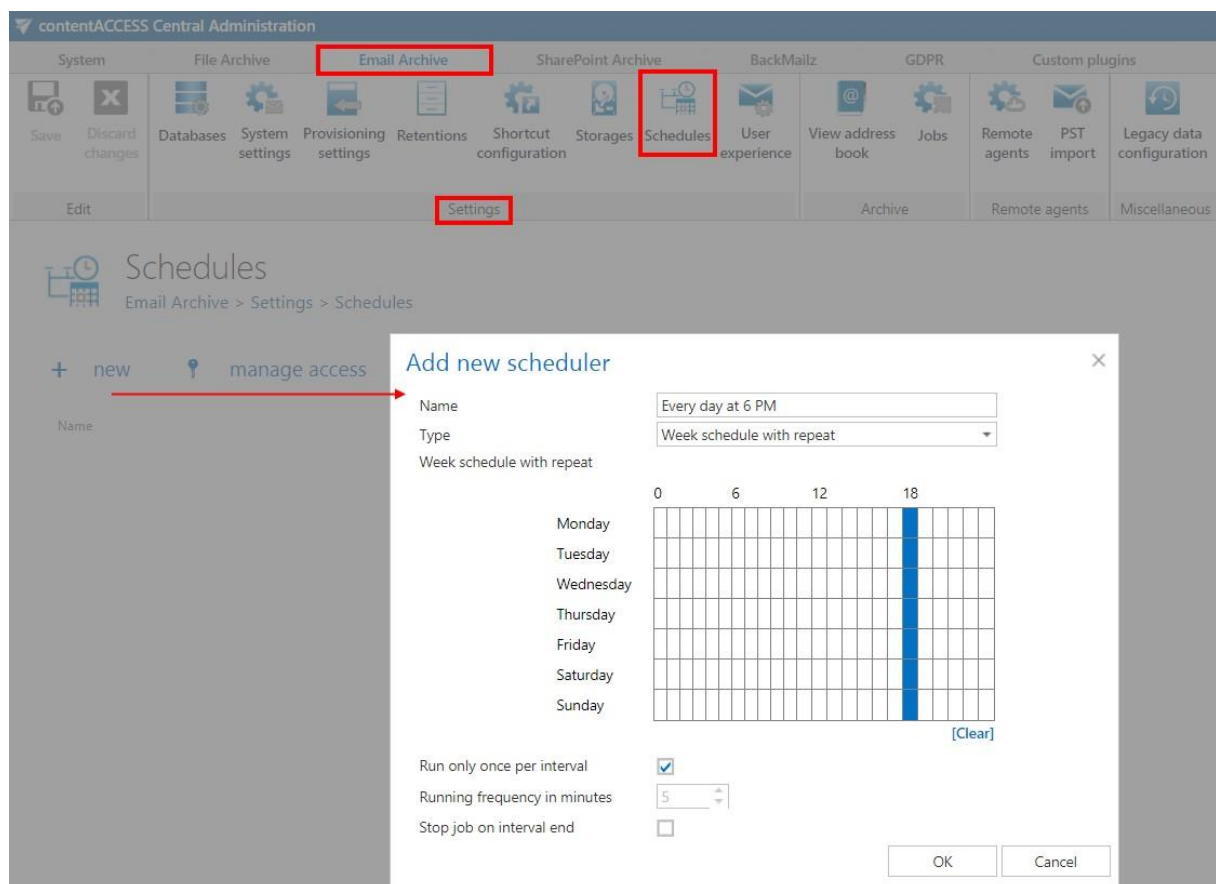
The location you set here will be used to store your binaries. If an explicit user will not be selected for this storage, then the contentACCESS service user will be used automatically. The store must also have **enough free space** and the data on it must be secured against data loss (a backup must be created).

The storage created first will be set to default automatically.

## Configuring the provisioning and archive scheduler

**Configure 2 schedulers, one for the provisioning job, the second for the email archive job.**

Open the **Schedules** page (**Email Archive** ➤ **Settings** ➤ **Schedules**) and click option **+ new**. Create "Week schedule with repeat" scheduler with name "Every day at 6 PM". Check the **Run only once per interval** checkbox (we do not need to run the archiving multiple times in the interval). Fix the start time of the email archive job running in the week map (Screenshot A).



Screenshot A



**For the provisioning scheduler:** on the same page, create a “Week schedule with repeat” scheduler with name “Provisioning scheduler”. Check the **Run only once per interval** checkbox (we do not need to run the job multiple times in the interval). Fix the start time 1 AM – of the provisioning running in the week map (Screenshot B).

Screenshot B

## Provisioning settings

Open the **Provisioning settings** page on the ribbon (*Email Archive* *Settings* *Provisioning settings*). Configure the provisioning as follows: a) set the “Provisioning scheduler” from the list, b) under Notification settings, choose “Never” from the dropdown list (monitoring job will check potential system and job misconfigurations), and c) under Exchange groups, click **+ select** and add “Archiving” to the list of objects to be provisioned.



contentACCESS Central Administration Tenant: TA Documentation

System File Archive **Email Archive** SharePoint Archive BackMailz GDPR Custom plugins

Save Discard changes Databases System settings **Provisioning settings** Retentions Shortcut configuration Storages Schedules User experience View address book Jobs Remote agents PST import Legacy data configuration

Edit Settings Archive Remote agents Miscellaneous

## Provisioning settings

Email Archive > Settings > Provisioning settings

✓ start immediately refresh disable auto refresh deactivate job logs edit

Status: **Idle**  
Progress:

Force full crawl (Click to maintain a full crawl for the next provisioning run.)

**a) Scheduling settings**

Scheduled in: Provisioning scheduler

**b) Notification settings**

Send when: Never

Recipient list: john.doe@example.com, peter.white@example.com

Exchange servers

Please choose servers or groups you decided to process by provisioning job. If a server is selected, all the groups in it will be processed.

Servers: select

| Name               | Server DN |
|--------------------|-----------|
| No data to display |           |

**c) Exchange groups**

Groups: select + add

| Name      | Group DN                                   |
|-----------|--|
| Archiving | CN=Archiving,OU=VWE_TEST,DC=ta,DC=internal |

**Important!!!** The provisioning job synchronizes the Exchange with the contentACCESS Address book. Therefore, the **Provisioning job must run before the archiving process is started**. We configured a daily scheduler starting at 1 AM for the provisioning job and a daily scheduler from 6 PM for the email archiving job. It is also a solution to start the provisioning job manually to ensure all the selected objects are synchronized into contentACCESS.

The provisioning job is an elementary job to one or more email archive jobs, which should extract Exchange groups and subgroups and synchronize these changes and mailbox permissions with contentACCESS. If the whole Exchange server is selected, then it is redundant to select Exchange groups for processing.

Under **Notification settings**, you can also set where and when to send emails about the potential errors, warnings that might occur during the running of the synchronization. It is





recommended to send these emails when errors occur, but if you use the monitoring feature, then this step can



be disregarded. If you use notifications, then it must be first configured in System **7** Services **7**

Notifications.

#### Notification settings

|                 |  |
|-----------------|--|
| Send when:      | <input type="text" value="Never"/>   |
| Recipient list: | <input type="text" value="john.doe@example.com,peter.white@example.com,"/> |

Under **Archive settings**, check the **Assign to mailbox** checkbox. 3 dropdowns and the **Create contentWEB user** checkbox will appear. With the dropdowns it is possible to select the default **Database**, **Store** and **Index zone** for the mailboxes. During the run of the provisioning job, if there are new mailboxes provisioned, the selected **Database**, **Store** and **Index zone** will be automatically assigned to them. Check also the **Create contentWEB user** checkbox (this must be enabled to automatically give access to end users). Thanks to this, a contentACCESS user will be created with the selected **Mailbox owner role** in case that **Create contentWEB access** is set to **Inherit** in the **Address book** for that mailbox **AND**:

- the mailbox is **not** in any group and **Create contentWEB access** is **not set to Forbidden** for the server in Address book, **OR**
- for all the groups the mailbox is a member of, the **Create contentWEB access** is set to **Inherit** in Address book and **Create contentWEB access** is **not set to Forbidden** for the server in Address book, **OR**
- for at least one of the groups the mailbox is a member of, the **Create contentWEB**

|                                |  |  |
|--------------------------------|--|--|
| Assign to mailbox:             | <input checked="" type="checkbox"/>              |  |
| <b>access is set to Enable</b> |  |  |
| Database connection:           | <input type="text" value="Email Archive DB"/>    |  |
| Storage name:                  | <input type="text" value="Email Archive store"/> |  |
| Index zone:                    | <input type="text" value="Default index zone"/>  |  |
| Create contentWEB user:        | <input checked="" type="checkbox"/>              |  |

## Creating a Content indexing job

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

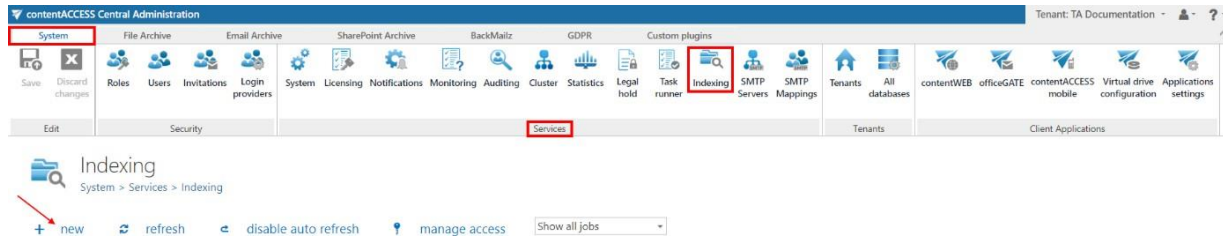


selected entities.



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

### Indexing.



- b) **Name** the indexing job (in our case, EmailArchive 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

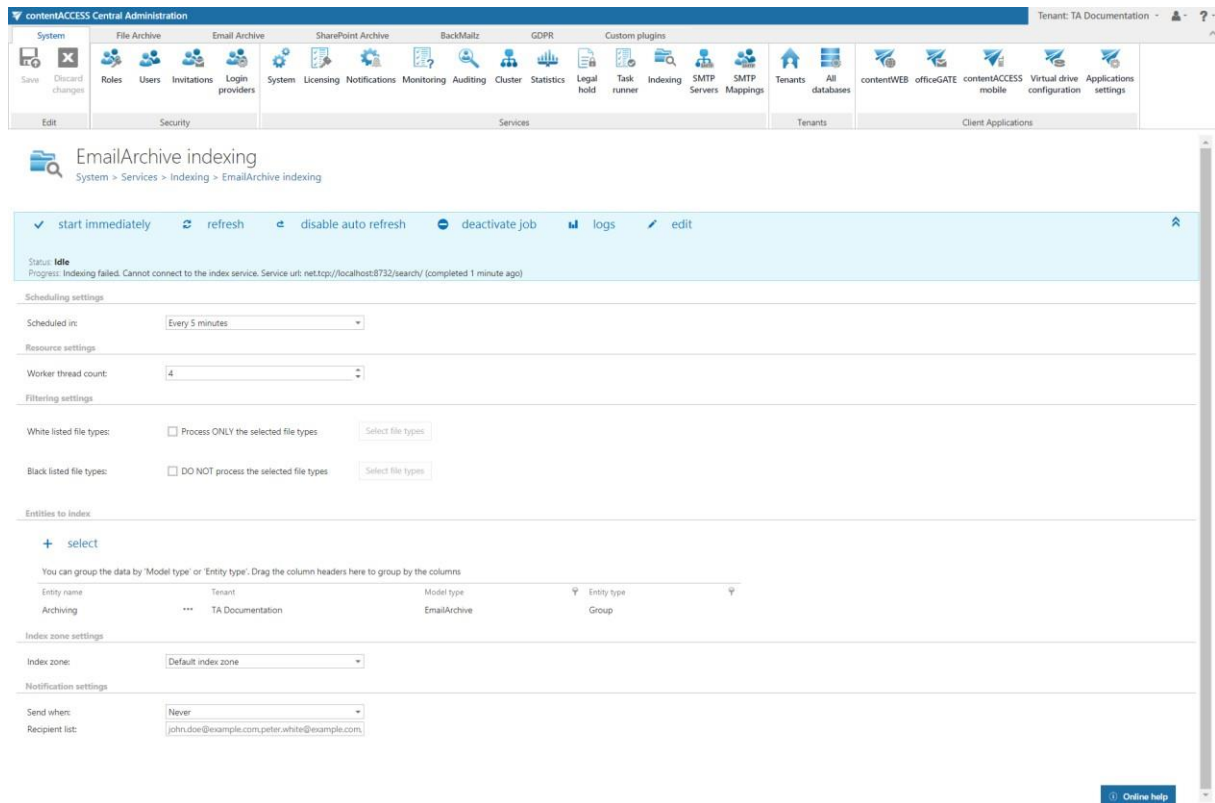
Run on node:
Any available

Display name:
EmailArchive indexing

Add
Cancel

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

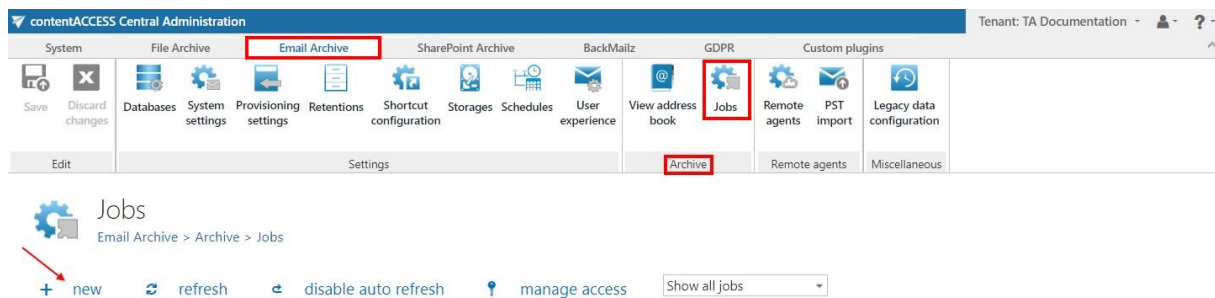
- c) **Scheduling settings** – run every 5 minutes
- d) **Resource settings** – specify the number "4"
- e) **Filtering settings** – set here the file types that should and shouldn't be processed
- f) **Entities to index** – select the entities that will be processed by the job (in our case the EmailArchive 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



## Creating an Email archive job

Now we create an Email Archive job.

a) On the page of **Jobs (Email Archive → Archive → Jobs)** click **+ new** option.



b) Enter the **Display name** (Daily mailbox archiver) into the **Add new job instance** window and click **Add**.



Add new job instance

Available jobs:

Email archive

Run on node:

Any available

Display name:

Daily mailbox archiver

Description:

Plugin for email archiving.

Add

Cancel

c) Click **OK** in the pop-up window to open the job's configuration page and configure it.

tacatest:3333 says  
Would you like to configure this instance now?  

OK

Cancel

The administrator must configure these sections on the job's configuration page: **Database settings, Scheduling settings, Storage settings, Shortcutting, Retention settings, Address book objects to process, Include folders**. Filtering settings are optional and allow to set specific criteria for the email archiving (age, size, emails to be excluded etc.).

- d) Set "Email Archive DB" that we created in step 4 above. The metadata will be stored here.
- e) Select the "Every day at 6 PM" scheduler we created in step 10 above.
- f) Select the "Email Archive store" storage we configured in step 9 above.
- g) In "Shortcut settings", select "Shortcut HTML" that we configured in step 8 above. By clicking on the **Change** button(s), it is also possible to set filters for the archiving job (more information [here](#)).

**Note:** In the same section, you may set age and size filters that should be used by the archive job. If everything needs to be archived (like in this use case), you can skip these filters.

The shortcut settings allow to combine more shortcut types. If you want to archive your messages, but need to keep them in the mailbox during a certain time (e.g., 6 months) and



them with a shortcut (e.g., HTML), after this time, you can combine the “Keep original” and a second, e.g., HTML shortcut. The screenshot below shows how to combine shortcuts for this use case (for more information, refer to the online guide [here](#)):

**Shortcutting**

Shortcut types:

☒ Apply to NOT ARCHIVED items  
 Use shortcut **Keep original** for items where filter is **(Sent date younger than "6 months(s)")** [\[Change\]](#)

☒ Apply to ALREADY ARCHIVED items with keep original shortcutting method  
 Use shortcut **Shortcut HTML** for items where filter is **(Sent date older than "6 months(s)")** [\[Change\]](#)

h) Select **retention** “10 years”, which we configured in step 7.

**contentACCESS Central Administration** Tenant: TA Documentation

System | File Archive | **Email Archive** | SharePoint Archive | BackMailz | GDPR | Custom plugins

Save | Discard changes | Databases | System settings | Provisioning settings | Retentions | Shortcut configuration | Storages | Schedules | User experience | View address book | Jobs | Remote agents | PST import | Legacy data configuration

Edit | Settings | Archive | Remote agents | Miscellaneous

**Processing settings**

☐ Use MAPI to communicate with Exchange Server (Supported only for versions up to Exchange 2013)

**d) Database settings**

Database connection: **Email Archive DB** [\[Change\]](#)

**e) Scheduling settings**

Scheduled in: **Every day at 6PM**

**f) Storage settings**

Storage name: **Email Archive store**

**g) Shortcutting**

Shortcut types:

☒ Apply to NOT ARCHIVED items  
 Use shortcut **Shortcut HTML** for items where filter is **not set** [\[Change\]](#)

☐ Apply to ALREADY ARCHIVED items with keep original shortcutting method  
 Use shortcut **Select from the repository** for items where filter is **not set** [\[Change\]](#)

**h) Retention settings**

Retention: **10 years**

i) In the next step, select **Archiving** group to be archived. Click **+ select** option in section “Address book objects to process” and search for the desired group in the dialog.



Address book objects to process

select

Name

Mailbox selection

refresh

| <input checked="" type="checkbox"/> |  | Name      | Type  | Email address |
|-------------------------------------|--|-----------|-------|---------------|
|                                     |  | Archiving |       |               |
| <input checked="" type="checkbox"/> |  | Archiving | Group |               |

☒ Contains([Name], 'Archiving;') [Clear](#)

OK Cancel

j) Select the mailbox folder that must be archived in the “Include folders” section. By default, the job is set to process the entire mailbox. Now, we will archive only subfolder “All documents” on the INBOX root, so we set it here. (Refer to the picture below.)

k) The “Exclude folders” section allows to set folders to be excluded from the archiving.

**Important:** Exclude rules, defined in **System settings** in step 6 above, take priority over the **Item filtering** settings of the **Archive job**.

l) Under “Notification settings”, select “Never”, as we will use the monitoring feature to check the details of possible system or job-related failures.

**Note:** If you wish to get notification emails if any errors/warning occur during the archiving process, you can set it here. Specify, to be informed about errors, warnings or both, and enter the email address where these notification emails must be sent.

m) Under “Resource settings”, set value “4”.

**Note:** This value determines the number of simultaneously processed items by the archive job.





contentACCESS Central Administration Tenant: TA Documentation

| System               | File Archive   | Email Archive   | SharePoint Archive     | BackMailz  | GDPR          | Custom plugins |
|----------------------|--|---|------------------------|--|---------------|----------------|
| Save Discard changes | Databases System settings Provisioning settings Retentions | Shortcut configuration Storages Schedules User experience | View address book Jobs | Remote agents PST import Legacy data configuration |               |                |
| Edit                 | Settings   |   |                        | Archive  | Remote agents | Miscellaneous  |

j) Include folders

Folder filtering type: One single folder

%INBOX%

k) Exclude folders

+ new ↺ import

Pattern

No data to display

l) Notification settings

Send when: Never

Recipient list: john.doe@example.com,peter.white@example.com

m) Resource settings

Worker thread count: 4

[Online help](#)

## Saving the changes

Save your changes.

contentACCESS Central Administration Tenant: TA Documentation

| System                      | File Archive   | Email Archive   | SharePoint Archive     | BackMailz  | GDPR          | Custom plugins |
|-----------------------------|--|---|------------------------|--|---------------|----------------|
| <b>Save</b> Discard changes | Databases System settings Provisioning settings Retentions | Shortcut configuration Storages Schedules User experience | View address book Jobs | Remote agents PST import Legacy data configuration |               |                |
| Edit                        | Settings   |   |                        | Archive  | Remote agents | Miscellaneous  |

The job can be started also manually by clicking on “start immediately” in the header bar of its configuration page:

Daily mailbox archiver  
Email Archive > Archive > Jobs > Daily mailbox archiver

☒ start immediately [refresh](#) [disable auto refresh](#) [deactivate job](#) [logs](#) [edit](#)

Status: **Idle**  
Progress:

## Archive job events

Now, we will check the “Archive job” events to see if everything has run properly. Open the **Monitoring** page (**System** **Services** **Monitoring**), using the “logs” option in the

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job's hat



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 format:

## Email archive's Address book

The Archive job will assign the "Email Archive DB" database and "Email Archive store" during its first run. These configurations can be checked on the page of View address book (**Email Archive** **➤ Archive** **➤ View address book**), in the corresponding column of the archived mailboxes in the **Exchange mailboxes** tab:

| Name                    | Email                       | Create contentWEB access | Associate with role | Enable mail app | Archive database | Store               | Active | Server name | Disconnected | Process as journal | Warning | Index zone         |
|-------------------------|-----------------------------|--------------------------|---------------------|-----------------|------------------|---------------------|--------|-------------|--------------|--------------------|---------|--------------------|
| Emily Blunt             | *** blunt@ta.internal       | Inherit                  | Inherit             |                 | Email Archive DB | Email Archive store | Yes    | TADC01      | No           | No                 |         | Default index zone |
| Jean Reno               | *** reno@ta.internal        | Inherit                  | Inherit             |                 | Email Archive DB | Email Archive store | Yes    | TADC01      | No           | No                 |         | Default index zone |
| Julia Deleted           | *** julia@ta.internal       | Inherit                  | Inherit             |                 | Email Archive DB | Email Archive store | Yes    | TADC01      | No           | No                 |         | Default index zone |
| Keanu Reeves            | *** keanu@ta.internal       | Inherit                  | Inherit             |                 | Email Archive DB | Email Archive store | Yes    | TADC01      | No           | No                 |         | Default index zone |
| Shared01                | *** Shared01@ta.internal    | Inherit                  | Inherit             |                 | Email Archive DB | Email Archive store | Yes    | TADC01      | No           | No                 |         | Default index zone |
| test_repair@ta.internal | *** test_repair@ta.internal | Inherit                  | Inherit             |                 | Email Archive DB | Email Archive store | Yes    | TADC01      | No           | No                 |         | Default index zone |
| Thomas Muller           | *** muller@ta.internal      | Inherit                  | Inherit             |                 | Email Archive DB | Email Archive store | Yes    | TADC01      | No           | No                 |         | Default index zone |
| Tom Cruise              | *** cruise@ta.internal      | Inherit                  | Inherit             |                 | Email Archive DB | Email Archive store | Yes    | TADC01      | No           | No                 |         | Default index zone |



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