

# Netmail Archive Quickstart Guide

Congratulations on deploying Netmail Archive! Now what? With all the features Netmail Secure has to offer, you may not know where or how to configure the various settings in the Netmail Administration Console. This quickstart guide addresses the most common topics or questions you may have as you get started with Netmail Secure.

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**Note:** For more information about Netmail Archive, refer to *Netmail Archive 5.4 Administration Guide for Novell GroupWise* or *Netmail Archive Administration Guide for Microsoft Exchange*.

## 1. System Status

You can verify the status of your Netmail system at any time through the Netmail Administration Console. Refer to the **Diagnostics** tab for Netmail Archive, Index Server, and mail system (GroupWise/Exchange) status information. You can also see which users are currently active in Netmail Search.

## 2. System Configuration

You can view or change the Netmail Archive configuration settings in a few areas within the Netmail Administration Console:

- To configure your index server(s), default log settings, tracking settings, and default notification settings, navigate to the **Archive > YourCluster > Configuration** tab.  
For more information, see [Netmail Archive System – Configuration Tab for GroupWise](#) or [Netmail Archive System – Configuration Tab for Exchange](#).
- To configure and/or run the address book sync, navigate to the **Archive > YourCluster > Address Book Sync** tab.  
For more information, see [Updating the Address Book Cache for GroupWise](#) or [Updating the Address Book Cache for Exchange](#).
- To configure your storage device(s) and storage location(s), navigate to the **Archive > YourCluster > Storage** tab.  
For more information, see [Specifying Locations for GroupWise](#) or [Specifying Job Settings for Exchange](#).

## 3. Node Configuration

Netmail Archive provides node-level configuration capabilities to help manage the workload of within a single cluster, with respect to running jobs/agents. To view or modify your Master (or Worker), navigate to **Archive > YourCluster > Nodes > YourMasterNode** (or **YourWorkerNode**).

## 4. Policy Configuration

With Netmail Archive, you can create and implement an unlimited number of email retention, storage, and compliance policies. These policies can be applied to all users within your organization or only to selected user accounts. Netmail Archive policies are applied to users through the Netmail Archive job agents.

To create a Netmail Archive policy, navigate to the **Archive > YourCluster > Policies**, and click **Create**. Alternatively, you can expand the **Policies** object to reveal a list of pre-configured policies that can be used as is. To configure a policy, click the name of the policy you want to set up. From here, you can modify a number of policy criteria.

For more information about policy configuration, refer to [Policy Planning, Configuration, and Management for GroupWise](#) or [Policy Planning](#),

## 5. Agent Configuration

To view the types of job agents available to you, navigate to **Archive > YourCluster > Agents**. A large number of pre-configured job templates are available, which can be used out-of-the-box or modified to suit your organization's needs. It is also possible to create new jobs from scratch to ensure that all your archiving and retention needs are met.

Netmail Archive offers the following job agents:

- **Archive:** This agent copies items from either GroupWise or Exchange to an archive storage location, where the data is stored in XML format and retained for compliance and/or eDiscovery purposes.  
For more information, refer to [Archive Agent Configuration and Management for GroupWise](#) or [Archive Agent Configuration and Management for Exchange](#).
- **Discovery:** This agent allows you to create jobs to analyze the state of your GroupWise messages store and produce statistical reports on the contents. Available for GroupWise systems only.  
For more information, refer to [Discovery Agent Configuration and Management](#).
- **Export:** This agent allows you to create jobs that can automatically copy content from your XML repositories to another location.  
For more information, refer to [Export Agent Configuration and Management for GroupWise](#) or [Export Agent Configuration and Management for Exchange](#).
- **Group:** This agent is used to schedule a series of jobs to run sequentially.  
For more information, refer to [Group Agent Configuration and Management for GroupWise](#) or [Group Agent Configuration and Management for Exchange](#).
- **ILM:** This agent allows you to create full information lifecycle management policies to address your organization's long-term records retention and records management needs.  
For more information refer to [ILM Agent Configuration and Management for GroupWise](#) or [ILM Agent Configuration and Management for Exchange](#).
- **Index:** This agent allows you to create separate index jobs for your archived data to facilitate index maintenance.  
For more information, refer to [Index Agent Configuration and Management for GroupWise](#) or [Index Agent Configuration and Management for Exchange](#).
- **Migration:** This agent allows organizations that are migrating from a GroupWise email platform to an Exchange email platform to migrate their data to the new platform. This agent is used in conjunction with the Archive Agent and the Provisioning Utility for a seamless migration. Available for Exchange systems only.  
For more information, refer to [Migration Agent Configuration and Management](#).
- **Tracking:** This agent allows you to create jobs that track archiving and/or migration projects by comparing the items in a data source to those in a data destination.  
For more information, refer to [Tracking Agent Configuration and Management for GroupWise](#) or [Tracking Agent Configuration and Management for Exchange](#).
- **Storage Management:** This agent allows you to validate the integrity of users' archives and detect gaps in the archived data.  
For more information, refer to [Storage Management Agent Configuration and Management for GroupWise](#) or [Storage Management Agent Configuration and Management for Exchange](#).
- **Attachment Management:** This agent allows you to strip attachments from email messages, thereby reducing storage bloat on your Exchange server and allowing you to better manage your storage requirements. Available for Exchange systems only.  
For more information, refer to [Attachment Management Agent Configuration and Management](#).
- **Utility:** This agent allows you to perform various maintenance tasks on your GroupWise or Exchange message store, such as folder management and mailbox size reduction.  
For more information, refer to [Utility Agent Configuration and Management for GroupWise](#) or [Utility Agent Configuration and Management for Exchange](#).

## 6. Running Jobs

Jobs can be scheduled to run through the **Job Settings** tab of each individual job. This tab allows you to select a policy to apply to your job, select the users you want to process as part of the job, and schedule the job to run. For more information about job settings, refer to [Specifying Job Settings for GroupWise](#) or [Specifying Job Settings for Exchange](#).

## 7. Proxy Access Configuration

Users can be given proxy access to other users' email archives, such as those of former employees. When a user who has been granted proxy

access to another user's archives logs in to Netmail Search, they will automatically see the other user's archives, in addition to their own archives. To grant and manage proxy access rights, navigate to the **Archive > Proxies Admin** tab. Refer to [Managing Proxy Access to Archives for GroupWise](#) or [Managing Proxy Access to Archives for Exchange](#).

## 8. Legal Hold Configuration

Netmail Archive's legal hold feature allows administrators to tag accounts as being on legal hold, and any jobs that subsequently run will ignore all accounts placed on legal hold. In addition, administrators can assign [Case Manager](#) privileges to users, allowing those users to enable legal hold for different cases and even assign [Auditor](#) rights to other users. For more information about enabling and configuring legal hold, refer to [Configuring In-Place Legal Hold for GroupWise](#) or [Configuring In-Place Legal Hold for Exchange](#).

## 9. Storage Management

As previously described, the Storage Management agent allows you to validate the integrity of users' archives and detect gaps in the archived data. A report containing a list of all users accounts which have gaps in the archived data can be created, and an all-inclusive Archive job can be subsequently run to capture the missing data. For more information, refer to [Storage Management Agent Configuration and Management for GroupWise](#) or [Storage Management Agent Configuration and Management for Exchange](#).

## 10. Attachment Management

As previously described, the Attachment Management agent allows you to strip attachments from email messages, thereby reducing storage bloat on your Exchange server and allowing you to better manage your storage requirements. Each stripped attachment is replaced with an HTTP link that points to the original attachment. As such, you can manage email mailbox sizes by removing storage-intensive attachments from Exchange while keeping the attachments accessible to end users. Available for Exchange systems only. For more information, refer to [Attachment Management Agent Configuration and Management](#).