

ILM Agent Configuration and Management

ILM (Information Lifecycle Management) provides organizations with the ability to create full information lifecycle management policies to address their long-term records retention and records management needs. Using pre-defined policies, organizations can better manage their archived data. The ILM Agent of Netmail Archive offers organizations the ability to manage archived data by creating jobs to delete expired messages, or to automatically move subsets of archived data to alternate archive locations in a process called grooming.

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Selecting ILM Job Criteria

After creating your ILM Job and specifying appropriate Job Settings as described in [Job Creation and Distribution](#), you are ready to select advanced ILM Job criteria. To begin, click the name of the job you created earlier. By default, the **Job Settings** tab is displayed. The **Job Settings** tab allows you to configure basic settings for any of your jobs. The **Job Settings** tab is available on each Job Agent and is displayed by default when you click on the name of the job you created.

Click the **Criteria** tab. The **Criteria** tab allows you to specify where Netmail Archive will find the archives in XML format that you want to groom, delete, or migrate to off-line storage devices, as well as additional job criteria.

The screenshot displays the Netmail Platform interface. The top navigation bar includes the 'netmail' logo and links for 'Help', 'Support', and 'Log Out admin'. The left sidebar shows a tree view of the platform structure, with 'Sample ILM Job' selected under the 'ILM' folder. The main content area is titled 'Criteria' and contains the following configuration options:

- Action Type:** Radio buttons for 'Deletion' (selected) and 'Grooming'.
- Data Source:** A dropdown menu set to 'Archives' with the label 'Specify or choose the location of the Archive source files:'. A checkbox for 'Expired messages only' is checked.
- Deletion:** Radio buttons for 'Index Only', 'Archives and Indexes' (selected), and 'Archives, Audit Files, and Indexes'. Descriptive text is provided for each option.

At the bottom of the configuration area are buttons for 'Save', 'Cancel', 'Rename', 'Clone', and 'Delete'. The footer of the interface reads 'Messaging Architects.'

Selecting ILM Actions

Select what type of action you want to perform under **Action Type**. You can choose from the following actions:

- Deletion
- Grooming

Data Source

Under **Data Source**, specify the source location of the archives that you want to use and whether you want to process expired items only.

- Data Source

Specify or choose the location of the Archive source files:

Archives

Expired messages only

Location

From the drop-down list, select one of your existing archive storage locations where the ILM will find the archive files to be processed.

Note: If no locations appear in the list, you must configure a location as described in [Specifying Locations](#).

Expired Messages Only

Select this option if you want to delete or groom expired messages only. If you do not choose this option, then the ILM Job will delete or groom the items based solely on the date range specified in the policy that you assign to the ILM Job, regardless of the retention flag applied to the items at the time of their archiving. See [Applying Retention Criteria](#) for more information.

It is this option that allows you to override a previously applied retention period on your archived data. For example, say you initially archived your data with a 7-year retention flag applied to each item, but you later decide that you only require to retain items for 5 years. In this scenario, you could configure an ILM Deletion Job with a policy that selects items up to 5 years old, ensuring that the **Expired Messages Only** option is not selected for the ILM Job. The job will then rely on the policy threshold alone when it has to decide which archived items to delete.

This option also helps in the scenario where you wish to archive items of mixed retention periods to a single location. Each Archive Job writing data to the location can do so with its own required retention period, say one with 5 years and one with 7 years retention. You can create and run just one ILM Deletion Job with a 5-year threshold policy, with the **Expired Messages only** option selected, against this archive location to delete items once they reach their retention threshold. In this way, the job will delete all items older than 5 years, except those that have been marked with a retention flag for a longer period that has not yet been reached.

Deletion

With the Deletion action type, the deletion settings allow you to specify exactly which components of the archive data you want to delete. Under **Action Type**, choose **Deletion**.

- Deletion

Select which data to Delete

Index Only

This option deletes only the indexes for the chosen items. In doing so, the items are left in the archive, but they are inaccessible to users and auditors. To re-enable access to such items, you would need to re-index the archived data.

Archives and Indexes

This option deletes the XML files of the archived items, as well as their indexes.

Archives, Audit Files, and Indexes

This option deletes the XML files of the archived items, their indexes, and the audit files which were created by Netmail Archive to track the actions taken on the archived items during their lifetime in the archive. This is the most commonly used option when removing items from the archive at the end of their retention period.

Index Only

This option deletes only the indexes for the chosen items. In doing so, the items are left in the archive storage location, but they are inaccessible to end users and auditors. To re-enable access to such items, you would need to re-index the archive data.

Indexes

This option deletes the archived XML files and the indexes for the chosen items.

Archives, Audit Files, and Indexes

This option deletes the archived XML files and the indexes of the chosen items as well as the audit files which were created by Netmail Archive to track the actions taken place on the items during their lifetime in the archive. This is the most common option used when removing items from the archive at the end of their retention period.

Grooming

When using the Grooming action type, you need to specify a target storage location to which you want to move the selected archive data. One common grooming scenario involves moving older archive data to storage locations set up on cheaper storage subsystems, such as NAS storage. As archive data gets older, it is typically accessed less frequently by end users. As such, moving it to slower but cheaper storage allows your organization to help manage your retention storage costs. Under **Action Type**, choose **Grooming**.

- Grooming Location

Enter the location where the data will be groomed to

Location:

Include Address Book

Grooming Location

From the drop-down list, select an existing archive storage location to which you want the ILM grooming job to move the archived data.

Note: If no locations appear in the list, you must configure a location as described in [Specifying Locations](#).

Include Address Book

Select this option if you want to include any archived personal Address Book information from the source location.

Retention Criteria

ILM Grooming Jobs provide you with the opportunity to modify or retain the retention flag applied to the archived items being moved. Select the type of retention criteria you want to apply to your ILM Job using the options listed under **Retention Criteria**.

- Retention Criteria

Apply Retention Flag

Set to: days Date Field (Mail Only): Created Date Delivery Date

Maintain current retention value

Enable Non-Erasable Format

Apply Retention Flag

This option flags each moved message with a retention time frame. For more information, see [Applying Retention Criteria](#).

- **Set to: [x] days:** The retention flag will be set, or reset if it was set on the source data, to the value you specify here.
- **Maintain current retention value:** This option allows you to keep an existing retention date, if the retention date has already been set on the source data (typically by an Archive Job).

Enable Non-Erasable Format

This option enables you to comply with regulatory and best-practices records-retention requirements by allowing the creation of non-rewritable, non-erasable WORM volumes on NetApp NearStore and FAS storage systems, thereby preventing critical files from being altered or deleted until a specified retention date has been reached.

When used in conjunction with these storage systems, this option ensures that the files are tamper-proof and non-erasable until the retention date has been reached.

Overwrite

Select **Overwrite existing archives** if you would like your ILM Grooming Job to overwrite any existing matching items in the target location.

- **Overwrite** _____

Overwrite existing archives

Important: After specifying your ILM Job Criteria options, click **Save** to save your settings. If you do not click **Save**, your settings will not be saved.