Index Agent Configuration and Management

The Index Agent allows system administrators to create separate Index Jobs for their archived data to facilitate index maintenance.

Inheriting an Archive Job

Index Jobs do not require a Policy filter, as they do not act on the mail system or archives, but rather on the indexes. As such, you do not assign a Policy to an Index Job. Instead, you need to specify the archive data to be indexed. There are two methods of doing so:

1. You can specify the archived data manually by selecting a storage location on the **Criteria** tab and then selecting archive accounts in that location using the **Users** list.
2. The Index Job can inherit location and account information from an Archive Job.

Typically, the **Inherit Archive Settings** option (on the **Job Settings** tab) is used when you have turned off real-time indexing on your Archive Job and wish to subsequently run an incremental Index Job to index the data which was produced by that job. Please note that an intervening **Address Book Sync** job will be required in order for the users in the Index Job to be properly updated from those Archive Job. Also, no other criteria is inherited from the Archive Job other than the accounts (e.g., even if the Archive Job targets only calendar items or certain date ranges, the Index Job will disregard these and process all items).

Selecting Index Job Criteria

Typically, the **Inherit Archive Settings** option is used when you have turned off real-time indexing on your Archive Job and wish to subsequently run an incremental Index Job to index the data which was produced by that Archive Job. For all other Index Job scenarios, you would use the manual method for selecting the data location and accounts to be processed.

After creating your Index Job and specifying appropriate Job Settings as described in Job Creation and Distribution, you are ready to select advanced Index 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 what kind of indexing you would like to create and the archive storage location for which you want to manage the indexes.

Choosing an Indexing Job Type

Under **Indexer**, choose the type of indexing you wish to perform from the available options:

- **Incremental Indexing:** This option indexes any new archive data in the chosen location.

- **Re-create Indexes:** This option re-indexes all of the data in the chosen location from scratch.

> **Important:** Re-creating indexes can be a time consuming task if you have large amounts of archived data in the specified location. During the re-indexing process, no archived data will be accessible or searchable by end users or auditors. As such, this type of re-indexing should be carried out only if absolutely necessary.

- **Failure list indexing:** A type of incremental indexing, this option indexes any item that was not successfully indexed by previous jobs, typically an Archive Job with real-time indexing. Such items are tracked in the audit folders of the storage locations in a *ToIndex.xml* file. This type of Index Job will attempt to index the items specified in that file for the specified accounts in the specified location and should be used with care.

- **Delete check points:** A type of incremental indexing, this option sets a checkpoint when a set of messages is fully indexed without any errors; when an Index Job next runs, only data from after the checkpoint will be indexed.

Choose the type of indexing which you wish to perform:

○ Incremental Indexing
This option indexes any new archived items in the chosen location.

◉ Re-create Indexes
This option re-indexes all of the data in the chosen location as if they were all newly archived items.

○ Failure list indexing
A type of incremental indexing, this option indexes archived item that were not successfully indexed by previous jobs, typically Archive Jobs with real-time indexing that ran into problems. Such items are tracked in the audit folders of the storage locations in a Toindex.xml file. This type of Index Job will attempt to index the items specified in those files and should therefore be used only when necessary.

○ Delete check points
A type of incremental indexing, this option resets the checkpoints that are created when a set of archived items is fully indexed without any errors; when an Indexing Job next runs, only data from after the checkpoint will be indexed.

Note: Modifying this setting may cause some default settings to change in the Data Source section.

> **Note:** Netmail recommends that you use real-time indexing on your Archive Jobs to keep your indexes up to date and avoid the need to run these dedicated Index Jobs.

Choosing a Source Location

Specify the location of the previously created archive data that you want to Index, and additional criteria under **Data Source**.

- Data Source

| Choose Archive Location: | Netmail-Archives ▼ |
| Items to be indexed: | ☑ Messages ☑ Attachments content |

Choose Archive Location

Use the dropdown menu to select an existing archive storage location where this Index Job can find the archives for which you want to create indexes.

> **Note:** If no locations appear in the list, you must configure a location as described in Specifying Locations.

Items to be indexed

From the two available options, select which items in the specified location are to be indexed:

- Messages (includes Tasks, Notes, Calendar items, etc.)
- Attachments

For Incremental Indexing, both **Messages** and **Attachments Content** are selected by default. You can opt to not index attachments, but you must index messages.

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