

Lotus Domino Archive Solution

is a product of:



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# *Lotus Domino Archive Solution*

## Installation instructions



Date : 11 - 2010

## Release History

Lotus Domino Archive Solution v2.7

- Add Discovery search functions.
- Add Person, Subject and Date search filters, including Field Mappings.


Lotus Domino Archive Solution sneak preview v2.7

In the following release the search functionalities will be extended:

Discovery search

### Archive Discovery Search - Limited to 1000 databases

[Use a Query Builder](#) [Search Options](#) [Tips](#)



[Notes on Discovery Search](#)

[Search Scope](#)

Database Type	<input checked="" type="checkbox"/> Production Databases <input type="checkbox"/> Archives
Users, Groups and O/OU's <a href="#">tips</a>	*IONET_ <input type="text"/>
Directories <a href="#">tips</a>	mail <input type="text"/>
Specific Databases <a href="#">tips</a>	Joe User <input type="text"/>
Limit to Production Servers <a href="#">tips</a>	IONET2_ <input type="text"/>

Document Contains [tips](#)

and  or

Person Contains [tips](#)

and  or

and Subject Contains [tips](#)

and Date is between [tips](#)  and

### User search

[More Search Options](#)

[select all](#)
[remove all](#)
[edit archive settings](#)
[open an archive](#)

<input checked="" type="checkbox"/> IONET2 - Joe User	<input type="checkbox"/> IONET2 - Archive 6 (created 17/09/2010)
<input type="checkbox"/> IONET2 - Joe User (Archive 1)	<input type="checkbox"/> IONET2 - Archive 7 (created 17/09/2010)
<input type="checkbox"/> IONET2 - Joe User (Archive 2)	<input type="checkbox"/> IONET2 - Archive 8 (created 17/09/2010)
<input type="checkbox"/> IONET2 - Archive 3 (created 17/09/2010)	<input type="checkbox"/> IONET2 - Archive 9 (created 17/09/2010)
<input type="checkbox"/> IONET2 - Archive 4 (created 17/09/2010)	<input type="checkbox"/> IONET2 - Archive 10 (created 17/09/2010)
<input type="checkbox"/> IONET2 - Archive 5 (created 17/09/2010)	

Search only specific Folders/Views  
 All Documents

Search Results "christe"

Page 1 - Results 1 to 3 of 3
[More Search Options](#)

Who	Date	Subject	Location
<a href="#">Christel</a> ... of the weekend. Well, guys, you're up-to-date now, so .....cheers! Best regards, <a href="#">Christel</a> Visser Mobile: +31 6 14829986 Fax: +31 8 48392354 Skype: <a href="#">christel</a> Misser ... <a href="#">Joe User</a>	09/10/2010 04:01:28 a.m.	Salvation Army	Joe User
<a href="#">Christel</a> OK thanks <a href="#">Christel</a> Yeah I think it would be a nice idea philosophically, as well as give us ... Internet: <a href="#">www.lialis.com</a> E-mail archiving for <a href="#">Joe User</a>	15/10/2010 08:26:13 a.m.	Re: Salvation Army	Joe User
<a href="#">Christel</a> Hi <a href="#">Christel</a> That's fantastic news! As you say an excellent start to the weekend. It's great ... Internet: <a href="#">www.lialis.com</a> E-mail archiving for <a href="#">Joe User</a>	09/10/2010 08:35:30 a.m.	Re: Salvation Army	Joe User

Page 1 - Results 1 to 3 of 3
[Previous](#) | [Next](#) | [Go To Page](#)

All Documents

Page 1 - Results 1 to 3 of 3  
[Previous](#) | [Next](#) | [Go To Page](#)

---

**Search Results "chrste"**

Page 1 - Results 1 to 3 of 3  
[Previous](#) | [Next](#) | [Go To Page](#)

chrste\*

[More Search Options](#)

AND  OR

Person Contains


and  or

and Subject Contains

and Date is between  and   ago

Filtering  Don't include these results in a new search

[Search only specific Folders/Views](#)



<a href="#">Who</a>	<a href="#">Date</a>	<a href="#">Subject</a>	<a href="#">Location</a>
<a href="#">Chrste!</a>	09/10/2010 04:01:28 a.m.	Salvation Army	Joe User
... of the weekend. Well, guys, you're up-to-date now, so... cheers! Best regards, <a href="#">Chrste!</a> Visser Mobile: +31 6 14829986 Fax: +31 8 48392354 Skype: <a href="#">chrste!visser</a> ...			
<a href="#">Joe User</a>			

#### Lotus Domino Archive Solution v2.6.6

- Introduce new color scheme.
- Suppress/work around various bugs with folder handling.

#### Lotus Domino Archive Solution v2.6.5.1

- Fix bug searching using Toolbar icon in R8+ Clients.
- Added different handling of Toolbar Search icon

#### Lotus Domino Archive Solution v2.6.5

- Allow restores to local dbs if mail is currently local.
- Fix bug with Size Reduction criteria not allowing for previous errors when generating SR increments.
- Add function to set the template name in archive databases.
- Add function to create FT Indexes & template names in remote databases when no archive exists.
- Add customizable subjects to emails.
- Add optional Toolbar Search icon installation & email.
- Include optional code in the IO Archive Routines Script Library to use for deleting archived documents from stubs and vice-versa.
- Fix bug if multiple errors generated when migrating documents.

#### Lotus Domino Archive Solution v2.6.4.4

- Fix timing problem when running parallel agents on schedule
- Attempt to update any FT Indexes before searching for docs
- Fix bug calculating size reduction when docs were not being correctly removed earlier

#### Lotus Domino Archive Solution v2.6.4.3

- Add ability to send problem doc and relevant docs to IONET for problem resolution.
- Move EnableFolderRefs call into main archive agent to ensure dbs always have correct folder properties set.
- Add ability to specify max errors before cancelling db archive.
- Add white color scheme.
- Fix different date formats in open archive prompt.
- Add data capturing routines in archiveDoc sub to try to get info on doc and requirements in the case of errors.

#### Lotus Domino Archive Solution v2.6.4.2

- Fixes bug with iNotes searching that was preventing different hostnames from being used from the customization doc

#### Lotus Domino Archive Solution v2.6.4.1

- Adds column to DWA view to display mail owner
- Updates web search doc to make sure http: is included.
- Fixes bug with AutoDBSetup agent where user has been renamed

#### Lotus Domino Archive Solution v2.6.4

- Re-uses the same search result doc for all pages of results, rather than one doc per page. This means for 10 pages of results, one 1 result document is created instead of 10. This is important for large organizations.
- Allow emails to contain fields from the DBInfo doc or Profile by wrapping in {}, e.g. {Title}.
- Fix bug running agents immediately.

#### Lotus Domino Archive Solution v2.6.3

- Fix JavaScript bug when clicking in the top 're-search' box after a Notes Client search.
- Allow Admin functions (Setup Databases, Find Orphaned Stubs, Move Databases/Archives) to run in the Client background, or scheduled.
- Honor \$NoPurge if a date, StartDateTime and RepeatInstanceDates when checking Calendar Entries, instead of just skipping repeating meetings. NOTE that if document expiry date is used (e.g. over x days old), then the 'expiry date' will be based on that, else the 'expiry date' will be today. Documents will not be archived if any of the \$NoPurge, StartDateTime or RepeatInstanceDates are greater than the 'expiry date'.
- Allow multiple databases to be manually selected from the Add Databases Actions.
- Fix bug causing some duplicate emails to be missed.

- Add deletion of local search results during searching, to prevent users having to replicate unnecessary data to search locally.
- Add option to restrict read access to DBInfo documents, to prevent users having to replicate unnecessary data to search locally.
- Enable Search Result Export.
- Expose 'Find Orphaned Stubs' agent in Database view actions.
- Sort Profile fields on save.
- Cancel archiving a database if > 50 errors.
- Write Size Reduction calculation (including % used) to the Log.
- Allow immediate archiving using a View Action.
- Include DWA Mail & Archive searching.
- Enable Folders to be selected on the search results page, if initially used.
- Add Defaults field to enable logging of background agents.
- Add ability to protect documents using @formulas.
- Allow Size Reduction criteria to delete/archive/strip attachments.
- Allow users the ability to set own criteria if selected in the Profile.

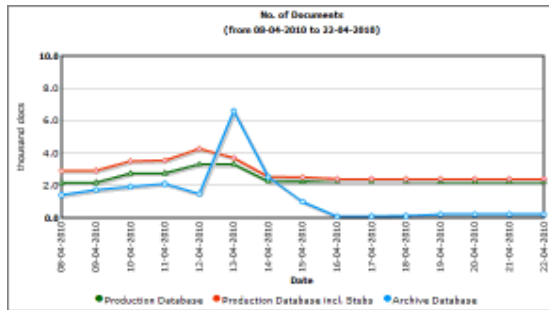
#### Lotus Domino Archive Solution v2.6.2

This release contains the following features and improvements:

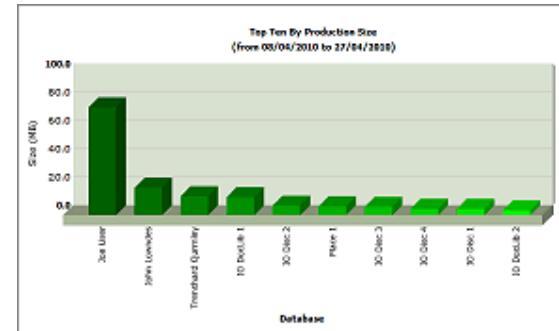
- Graphical (Flash) based reporting. You can now view On-Demand or Scheduled Reports on your archiving status for any combination of Servers, Databases and Dates, in a variety of ways
- Archive speed up to 25GB/min when running in Parallel mode. Parallel or Serial mode can now be set in the Archive defaults.
- Incremental Size Reductions. For example you can specify to reduce Database Sizes by xMB per archive, until the Databases reach the required size.
- Estimate the time to archive data using the last recorded archive speed of the environment (in MB/sec).
- Allow upload of local/native data, and replication/indexing of new archives, to occur in the background of the Client.
- Change setup to identify existing archives, e.g. if resetting databases where there are already multiple archives.
- Add option to restore all data from archives, run by Administrators from the DB Information Actions menu.
- Add Individual or Global Debug mode to identify problem documents.
- Allow Profiles to define the Archive Server & Path.
- Add MB volume to logging.
- Allow override of the \$NoPurge protection flag.
- Work around for IBM SPR #OIHZ7XFKDV.

### Reporting Example

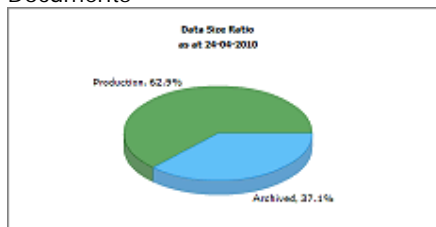
Volume of Data Archived, Number of Documents Archived, Production/Archive Data Size and Production/Archive Document Numbers



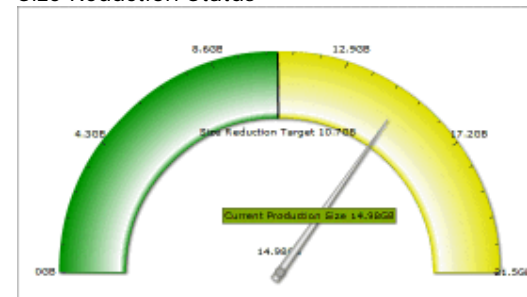
Top Ten by Production Size, by Data Archived, and by Documents Archived



Ratio of Production to Archived Data, and Production to Archived Documents



Size Reduction Status



### Lotus Domino Archive Solution v2.6.1

- Add reporting functions.
- Allow Create Local Replicas and build search indexes etc to run in background.
- If hitting 5000 doc search limit using Size Reduction archiving temporarily increase to 20,000 then reset.
- Ensure Profile fields inherit Default values from Default Profile.
- Only check Canonical names if listed in Profile as Canonical.
- Disable automatically protecting Response documents for mail type databases (e.g. to prevent orphans).
- Allow users to override the \$NoPurge protection flag.
- Various bug fixes

#### Lotus Domino Archive Solution v2.6

This version incorporates two new important functions.

- You can use a single profile to archive your whole Lotus Domino environment. It has never been so easy to setup Notes mail and application archiving. Use of mail users, groups, O/OU's and file directories can be used to select the people you need to archive.
- The Archive solution can now archive any Lotus Quickr place with maintaining links to the archived document. You have even the option to archive all Quickr documents to one central database.

#### Lotus Domino Archive Solution v2.5.8

- Reworked Mail Database Profile creation when creating Archives.
- When updating design elements using NoteNoteCollection, copy all items instead of using delete/recreate. This is because Notes occasionally leaves empty design stubs in the target database.
- Add search settings to Default document.
- Add Checkbox to exclude Calendar and Draft documents when setting Archive Criteria for mail files.

#### Lotus Domino Archive Solution v2.5.7

Bug fixes

#### Lotus Domino Archive Solution v2.5.6

Same as 255 except allows the Archive Solution to replicate - a new setting on the Defaults doc tells the Archive Solution to only process Databases & Directories using the same Archive server that the Archive Solution is on. For example, if an Archive replica is on Server1/ACME, that replica will only process those Databases that use Server1/ACME as their Archive Server. This means that instead of the Archive Solution on one server processing production databases on all other servers (default mode), you can replicate it and have each server process its own databases.

In addition the number of license keys has been extended to 20 (1 per server, allowing replication to 20 servers) and a 'Server' field has been added next to the License Keys to help with License management.

#### Lotus Domino Archive Solution v2.5.5

Same as 254 except;

- can handle date expiry on the license keys
- Includes a Default option to archive Mail Trash folders (for compliance).

#### Lotus Domino Archive Solution v2.5.4

- Includes Profiles.
  - Include option to restrict access to Archive databases. This is initially set via the Archive Defaults, then on a per-database level (Archiving Options tab). The options are to include specific ACL Managers for the archive database, and set all other ACL entries to level X. It is also possible to prevent deletions or not. This required an update of Restore agent, so if you have previously added the Restore agent to any databases, you need to re-add it to the

template (if using templates), or add it to the specific databases using Tools, For Selected DBs - Update Archive Design Elements. Something to note here is that if an Administrator is specified in the ACL individually, and also in a Group given Manager access to the Archive via the setting above, then the tool may restrict their individual access and this will take precedence over the group entry. So any individual names in the ACL that should have Manager access to the Archive must also be listed in the 'Limit Archive ACL Manager Access to' field.

Also you need to ensure that the (TempSetArcACL) is set to 'Run On Behalf Of' an Administrator. This agent is required because if restricting user access to the Archive/s to Reader level, then the user gets sent an email to migrate local (or native) archives to the Archive Solution, then they need access to create docs. The agent is called using RunOnServer & OnBehalfOf to temporarily increase their access for the duration of the migration, then sets it back.

#### Other enhancements

Option to set Consistent ACL on the Archive DB if synchronizing ACLs.

- Prompt if restored data is permanently restored or temporary.
- Add function to Move Multiple databases/archives.
- Admins can choose what days and at what time archiving runs. The Archive Solution will run only once per day unless the agents are restarted. If no date/time is set, the Archive Solution runs by default at 2am daily.
- Two options to migrate data from selected databases. If you want to migrate data from a server-based database to the Archive Solution, open the DB Info Document and select Actions, Migrate Data to the Archive. This creates a temporary document that is used by the ScheduledMigration agent to move data. If you want a user to move local data to the Archive, select their DB Info doc from a view and use the Action Tools, For selected DBs - Send 'Migrate Local Data' email. Both cases prompt to see if you want to use stubs etc.
- Check archive size after each doc is archived & create a new archive if required.
- Option in Archive Solution Defaults to add Referrer stubs when migrating native mail. You need to decide if you want to do this - the plus side is that if a user migrates their native archives, a stub is added to their production mail to link to the archived doc. the downside is that a lot of documents 'reappear' in their mail file, so they may get confused.
- Logs actions when migrating native archives or any other data.

# Contents

Release History .....	1
Contents.....	10
1. Introduction .....	12
1.1 Overview .....	13
2. Setup.....	14
2.1 Setup Archiver.....	14
2.2 Archiver Views.....	16
3. Globals and Defaults.....	17
3.1 Basics .....	17
3.2 Global Archive Settings .....	18
3.3 Default DB Archive Settings.....	22
3.4 Default DB Search Settings.....	27
3.5 Default DB Housekeeping Settings .....	28
4. Database Definition Documents.....	30
5. Profile documents .....	33
5.1 Basic.....	33
5.2 Archiving Criteria.....	34
5.3 Size Reduction Criteria .....	36
5.4 Archiving Options .....	37
5.5 Archive Setup.....	38
5.6 Searching .....	40
5.7 Housekeeping.....	40
6. Archive Setup (Actions) .....	41
6.1 Fine Tuning .....	41
6.2 Setup Archiving.....	41
6.3 Start the Archive Agents .....	42
7. Tools (Actions) .....	45
8. Drag-Drop Archiving .....	47
9. Deleting Documents .....	48
10. iNotes/DWA Archiving .....	49
11. Reporting.....	52
12. Discovery Search.....	53
12.1 Query Builder .....	53

12.2 Search Options.....	53
12.3 Search Scope .....	54
12.4 Search Fields.....	55
13. Administrator Actions on Database Definitions.....	<b>56</b>
14. Tips & Tricks.....	<b>58</b>

# 1. Introduction

The archived (email) documents turn up on the normal Lotus Domino-server, on which the Lialis Archive Solution is installed. This central Archive Solution manages the entire archiving process. The main advantage of the Lialis Archive solution is that employees have access to their archived (email) documents as easy as before, while the (email) documents remain visible on the same location (for example mail file). Via a link there is an invisible connection between the (email) document location and the archive database.

The Lotus Domino Archiving Solution has a special search functionality. This functionality searches both archived and not archived (email) documents. Therefore users do not notice what happens in the background. The solution can be used for both personal as general (mail) databases, on the server or locally stored.

## Functionalities

- Supports Notes/Domino R6.5, R7.\* and R8.\*
- Archive any Lotus Notes database, according your own criteria (one product which can be used as a Lotus Notes email Archive Solution, and/or Lotus Domino application Archive Solution and/or a Lotus Quickr Archive Solution)
- Applications needs development research
- Remove files and RT fields form Notes documents and leave link
- Google a like search functions; users can search their production and archive data at the same time.
- Application licensed with licence key
- Central administration tool with lots of functions
- Only add design elements to the mail file design
- Process duplicate emails in mail files
- Automatically maintain database sizes at a defined limit
- Allow drag/drop manual Archiving
- Attachments can be compressed during archiving
- Stubs can be used to preserve doclinks and view/folder appearances
- Possibility to archive the entire Lotus Domino environment with one profile document
- Almost transparant for users
- In combination with Mail Journaling each mail in the environment can be archived, without interference of the user

Feel free to contact us for more questions or more information about this application and the license structure: [marten.vosmer@lialis.com](mailto:marten.vosmer@lialis.com)

## 1.1 Overview

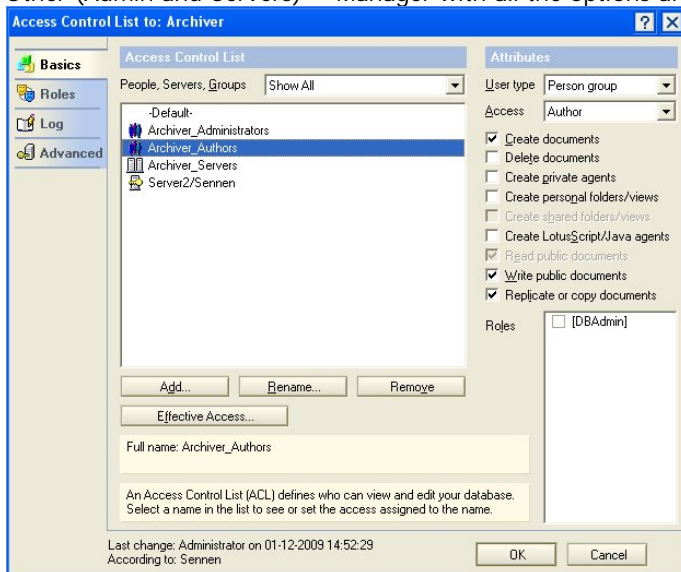
The table below shows the overview for the setup and configuration of the Archiver

Step	Task	Reference
010	Setup Archiver Tool	<a href="#">2.1</a>
020	Archive Defaults – Create Basic and Global Settings for the Archiver	<a href="#">3.1</a> / <a href="#">3.2</a>
030	Archive Defaults – Create Default Settings for the Archiver and/or Use a default Profile for this (see 040)	<a href="#">3.3</a> / <a href="#">3.4</a> / <a href="#">3.5</a>
040	Create Profile document(s)	<a href="#">5</a>
050	Create Database Definition documents - For individual (set of) database(s) (if necessary) or - Scheduled from Profile - Manually from Profile	<a href="#">4</a>  <a href="#">5.1</a> <a href="#">5.5</a>
060	Fine tuning Database Definition Documents Additional fine tuning, can be done manually on the document itself, but also through buttons, successively:	
	1. Button '2. Archive Setup': a. Enable/Disable Archiving b. Set Duplicate Email Handling c. Set Archiving Criteria d. Set Size Reduction Criteria e. Set Archive Start Date/Time f. Set Profile	<a href="#">6.1</a>
	2. Button '3. Tools': a. Enable/Disable Searching b. Enable/Disable Editing by Owners c. Add/Clear owners to/from Local Replica List d. Enable/Disable Native Archiving e. (Re)Send messages f. Update Archive Design Elements g. Move Databases/Archives h. Find Orphaned Stubs i. Archive Immediately	<a href="#">7</a>
070	Setup Definition Documents / Activate Archiving This task will create the Archive Databases	<a href="#">6.2</a>
080	Start the Archiving Agent	<a href="#">6.3</a>

## 2. Setup

### 2.1 Setup Archiver

- Copy the template to the archiver data directory on the server
  - Sign this template with the Administrator or Server ID (+ tell adminp process all)
  - Create a new database on the File Server, based on this template
  - If necessary, remove "Inherit design from master template" in database properties
  - Upload the desired icons, enter the license key and other Basic information (see [3.1 Basics](#))
  - Edit-save the document from view "Emails", this is necessary to provide the mails with the correct signature
  - Create a replica on the production server, this is necessary for creating the FTI's for the Production Database when Searching is enabled.
- ACL
    - Add Archiver groups to the Domino Directory
    - Default = No Access (possibly Author Can Create Access)
    - Authors = see below
    - Other (Admin and Servers) = Manager with all the options and role [DBAdmin]

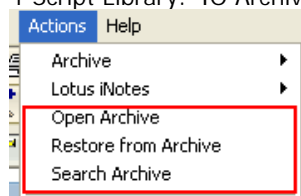


- Security
  - Add Archive Server and Administrator(group) (signing ID) to 'Sign or Run unrestricted methods and operations ' of the Production Server .
  - Add Archive Server to the Trusted Servers field on each Production Server.
  - Add Archive Server to the "Full Remote Console Administrators" field on the production server when this server is not present in the Administrators field.

- Agents
  - Agents (ZipFiles), (ZipFilesUser) and (UnZipFiles): run on behalf of → Archive Server
  - (TempSetArcACL) agent: run on behalf of → (Archiver\_)Administrators group
  - Load 10 Amgr tasks in the Server Document of the Archive Server, for the Archive Agents can run at the same time
  - Adjust the Agent execution time on the Archive Server. Day and night agents can run 360 minutes

Daytime Parameters		Nighttime Parameters	
Start time:	08:00	Start time:	20:00
End time:	20:00	End time:	08:00
Max concurrent agents:	10	Max concurrent agents:	10
Max LotusScript/Java execution time:	360 minutes	Max LotusScript/Java execution time:	360 minutes
Note: The following setting only applies to servers running R4.6 and earlier		Note: The following setting only applies to servers running R4.6 and earlier	
Max % busy before delay:	50	Max % busy before delay:	70

- Design (only for databases that use the Mail Template):
  - Add the following elements to the design of the (new) mail template. An easy way to do this is described in [14. Tips & Tricks](#) (first point). Sign the email template if necessary:
    - 3 Agents 'Search Archive', 'Open Archive', 'Restore from Archive'
    - 3 Agents '(Search Archive System)', '(Open Archive System)', '(Archive System Restore)'
    - 1 Form: 'ArchiveReferer'
    - 1 Script Library: 'IO Archive Routines' (when desired)



- Eventually followed by a [load convert mail \ \* . nsf \* mail85.ntf] (where mail85.ntf contains the new design elements), or a manual replace design

- If Drag-Drop Archiving will be implemented, see [8. Drag-Drop Archiving](#)
- If you want to synchronize document deletions between the Production and Archive database, see [9. Deleting Documents](#)
- If Archiving for iNotes/DWA will be enabled, see [10. iNotes/DWA Archiving](#)

## 2.2 Archiver Views

The following views are available in the Archiver database:

### Databases

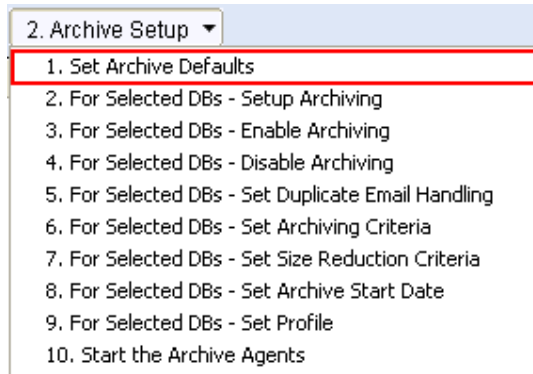
- All Databases – A list of all Database Definitions.
- Eligible Databases – All databases eligible for Archiving, i.e. have been set up correctly, are enabled, and have Archiving Criteria.
- Ineligible Databases – All databases ineligible for Archiving, i.e. not set up correctly, disabled, or no Archiving Criteria.
- Mail Databases – All Mail databases.
- DWA Searchable –
  - By Profile – All databases with a Profile, by Profile.
  - By Production Server – All databases by the Production Server.
  - By Archive Server – All databases by the Archive Server.
- Owner Can Edit – All databases where the Owners can edit the Archiving Criteria.
- Size Reduction Failed – All databases unable to be reduced to their Maximum Size.
- Migrate Native Criteria – All Mail databases where native Notes Archiving Criteria has been found.

### Administration

- Profiles – All Profiles.
- Translations – A list of documents that you can use to translate the UI into another language.
- Logs by Date – All logs by date.
- Logs by Database – All logs by database.
- Reports – All Archiving Reports.
- Report Data – Raw data used for reporting.
- Emails – Email content you can customise. Be careful if editing the content of buttons.
- Search Setup – Options to customise Searching.

### 3. Globals and Defaults

Before creating Profile or Database Definition documents, the Basic, Global and Default settings of the Archiver should be configured. Open the database and select "2. Archiver Setup / 1. Set Archive Defaults".



- Global Settings are applicable for all Database Definitions and can not be changed in the database definition documents afterwards;
- Default Settings only apply to Database Definition documents (not Profile documents) and can be adjusted afterwards

#### 3.1 Basics

If there are no logos in the database, upload the Main and Small Logo by using the button "Upload Logos" in Archive Defaults document.

Company Name	<company name>
Support Email	<email@domain.com>
License Key/s	<copy the license>
Colour Scheme:	Light Blue
Use Categorised Views?	View DB titles categorised on the first character. Default = "No"
Main Logo Image Resource:	Upload a logo by using the 'Update Logos' button
Small Logo Image Resource:	Upload a logo by using the 'Update Logos' button
If errors occur, email	Admin Notes mail address abbreviated
Web Hostname (for Charting):	The Web Hostname if Report Charts are to be used. Report Charts use Shockwave Flash served via HTTP, so the Domino Server running the Archiver must also run the HTTP protocol.

## 3.2 Global Archive Settings

### Archive Defaults

Basics **Global Archive Settings** Default DB Archive Settings Default DB Search Settings Default DB Housekeeping Settings

Run Settings	
Run Serially or Parallel?	<input checked="" type="radio"/> Serial <input type="radio"/> Parallel
If replicating the Archiver, only process those Databases using the current Server as the Archive Server?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Is the Archiver installed in a Cluster?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Preferred User Operation Server	<input type="text" value="..."/>
Run Archiving on Days	<input checked="" type="checkbox"/> Monday <input type="checkbox"/> Tuesday <input type="checkbox"/> Wednesday <input type="checkbox"/> Thursday <input type="checkbox"/> Friday <input type="text" value="..."/>
Start Archiving at	<input type="text" value="05:00"/> <input type="button" value="⌚"/>
After Archiving, run Console Commands	<input type="text" value="load updall mail -F -R&lt;br/&gt;load updall archive -F -R&lt;br/&gt;load compact mail -S 10"/>
Archive Settings	
Never archive documents matching formula	<input 1")"="" type="text" value="@Contains(Confidential,"/> <a href="#">check formula</a>
Allow Duplicate Email Handling?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Restrict Duplicate Email Handling to x documents per database	<input type="text" value="200"/>
Allow Permanent Restores?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Enable Archived Document Notification?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Send an alert if databases fail to reduce to the specified size during Size Reduction?	<input type="radio"/> Yes <input checked="" type="radio"/> No


Send an alert if databases fail to reduce to the specified size during Size Reduction?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Email Owner if the database reaches x% of the specified size, in a pattern of increasing volume?	<input type="text" value=""/> %
Archive Design Template	<input type="text" value=""/>
Synchronise ACLs between Production and Archive DBs?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Create Referer Stubs in Production Databases when migrating native Mail Archives?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Archive all email in Mail Trash Folders?	<input type="radio"/> Yes <input checked="" type="radio"/> No
When creating Quickr Archives, register the new Archive in the Place Catalog?	<input type="radio"/> Yes <input checked="" type="radio"/> No

### Log Settings

Retain log documents for x days	<input type="text" value="30"/>
Retain report documents for x days	<input type="text" value="14"/>
Run in Debug Mode?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Maximum errors allowed per database before stop archiving the database?	<input type="text" value="50"/>
Send error reports to the following email address?	<input type="text" value="archive_support@ionetsupport.com"/>
Log More Information for	<input type="checkbox"/> AutoDatabaseSetup Agent <input type="checkbox"/> VerifyProfiles Agent

Run Settings	
Run Serially or Parallel?	Default = Serial
	<ul style="list-style-type: none"> <li>Serial only starts 1 Archiving agent at a time, Parallel will start all 10 Archiving agents. Parallel is 10 times faster but also takes up more server performance.</li> </ul>
If replicating the Archiver, only process those Databases using the current Server as the Archive Server?	Default = No

	<ul style="list-style-type: none"> <li>• If you are replicating the Archiver to multiple Archive servers, select Yes</li> <li>• If you are running the Archiver in a Cluster, select No</li> <li>• If Yes, then each Archiver will only process the databases on its own server.</li> </ul>
Is the Archiver installed in a Cluster?	Default = No
	<ul style="list-style-type: none"> <li>• If Yes, then the Archiver only runs on the first server in the cluster.</li> </ul>
Preferred User Operation Server	Default = <blank> = <Archive Server>
	<ul style="list-style-type: none"> <li>• The server users will use to perform operations on (e.g. Searching)</li> </ul>
Run Archiving on Days	Default = <blank> → choose one or more days
Start Archiving at	Default = <blank> → select a date
	<ul style="list-style-type: none"> <li>• The start date of the archiver can be configured for each database in field 'Archiving starts on' in the Archive Setup (see <a href="#">5.5 Archive Setup</a>)</li> </ul>
After Archiving, run Console commands	Default = <blank>
	<ul style="list-style-type: none"> <li>• Commands are run on the Production Server AND Archive Server. For example:</li> <li>• Load-mail updall -F</li> <li>• Load updall archives\mail -F</li> <li>• Load compact mail -S 10</li> </ul>
Archive Settings	
Never archive documents matching formula	Default = <blank>
	<ul style="list-style-type: none"> <li>• Enter @-formula to protect documents in the Production database from being archived</li> </ul>
Allow Duplicate Email Handling?	Default = Yes
	<ul style="list-style-type: none"> <li>• Only mail databases</li> <li>• The method of handling must still be configured in the Database Definition Document: <ul style="list-style-type: none"> <li>○ No action (default)</li> <li>○ Archive</li> <li>○ Delete</li> </ul> </li> <li>• Replied/forwarded mail - compares to/from field, and then body and attachments. If an exact match is found, you can choose between archiving/deleting.</li> <li>• If strange characters are found, the agent will not process the mail.</li> </ul>
Restrict Duplicate Email Handling to x documents per database	Default = 200
	<ul style="list-style-type: none"> <li>• Only visible when "Allow Duplicate Email Handling?" is enabled</li> <li>• Performance - specify how many emails per database for each run. 200 mail = 40-50 seconds processing time and about 20% of the duplicates</li> </ul>

Allow Permanent Restores?	Default = Yes
	<ul style="list-style-type: none"> <li>If Yes, then the user can choose whether or not the documents will be restored forever (and never be archived again)</li> </ul>
Enable Archived Document Notification?	Default = No
	
Send an alert if databases fail to reduce to the specified size during Size Reduction?	Default = No
	<ul style="list-style-type: none"> <li>In case Size Reduction Criteria are implemented and the database can not comply. The alert will be sent to the Owner (I think)</li> </ul>
Email Owner if the database reaches x% of the specified size, in a pattern of increasing volume? Send Quota Warning mail to owner at %?	Default = <blank> = no quota warning messages
	<ul style="list-style-type: none"> <li>Warning when quotas will be exceeded and thus Size Reduction criteria are activated, this applies only when the database size has increased after the last time it was checked.</li> </ul>
Archive Design Template	Default = <blank>
	<ul style="list-style-type: none"> <li>Will be applied to all Archive Databases as the Design Template</li> </ul>
Synchronise ACLs between Production and Archive Databases?	Default = No → Set to Yes Enforce Consistent ACL → Select
	<ul style="list-style-type: none"> <li>Archive Database ACLs are also influenced by the Database Definition and Default Settings</li> <li>Enforce Consistent ACL for local replicas</li> </ul>
Create Referer Stubs in Production Databases when migrating native Archives?	Default = No → Set to Yes
	<ul style="list-style-type: none"> <li>If Yes, a referrer stub is placed in the Production Database during the migration of native archives. This means that archived documents from the native archive may reappear in the Production Database (as a stub)</li> </ul>
Archive all email in Mail Trash Folders?	Default = No
	<ul style="list-style-type: none"> <li>If Yes, the Empty Trash button needs to be removed/no longer be used. Mail will be instantly archived when it is deleted.</li> </ul>

When creating Quickr Archives, register the new Archive in the Place Catalog?	Default = No
Log Settings	
Retain Log documentation for X days	Default = 30
Retain report documents for x days	Default = 14
Run in Debug Mode?	Default = No
	<ul style="list-style-type: none"> <li>• Debug information is written to the server log in order to solve problems.</li> </ul>
Maximum errors allowed per database before stop archiving the database?	Default = 50
	<ul style="list-style-type: none"> <li>• Use 0 for No expiry.</li> </ul>
Send error reports to the following email address?	Default = archive_support@ionetsupport.com
Log More information for	Default = nothing
	<ul style="list-style-type: none"> <li>• Use this setting for solving problems, will be written to the server log.</li> </ul>

### 3.3 Default DB Archive Settings

## Archive Defaults

Basics | Global Archive Settings | **Default DB Archive Settings** | Default DB Search Settings | Default DB Housekeeping Settings

### Setup Settings

Default Profile	<input type="text" value=""/> ▾
During Setup, add Design elements automatically to the Production Databases?	<input checked="" type="radio"/> Yes <input type="radio"/> No
During Setup, automatically create Archive Databases?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Default Archive Server/s	<input type="text" value="ArchiveServer/ArchiveDomain"/> ▾
Default Archive Path/s	<input type="text" value="Archives"/> ▾
Default Archive Design Template	<input type="text" value=""/> ▾
Allow Owners to edit their Archive Criteria?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Restrict Database Document Read access to Owners and Administrators?	<input checked="" type="radio"/> Yes <input type="radio"/> No

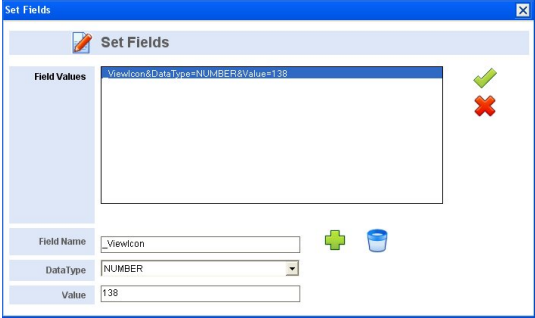
### Archive Settings

Replace documents in the Production Database with a Referral to the Archive, or Delete them?	<input checked="" type="radio"/> Replace <input type="radio"/> Delete
Never archive documents matching formula	<input type="text" value=""/> ▾ <a href="#">check formula</a>
Compress attachments during archive?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Compress attachments using extensions	<input type="text" value="doc; xls; pps; ppt; rtf; ntf; nsf"/> ▾
Retain Folder Structure?	<input checked="" type="radio"/> Yes <input type="radio"/> No

Limit Archive ACL Manager Access to:	<input type="checkbox"/> \$CPYServers <input type="checkbox"/> \$CPYAdministrators <input type="checkbox"/> LocalDomainAdmins <input type="checkbox"/> LocalDomainServers
Restrict all other Archive ACL Access to:	<input type="radio"/> Manager <input type="radio"/> Reader <input type="radio"/> Designer <input type="radio"/> Depositor <input type="radio"/> Editor <input type="radio"/> No Access <input type="radio"/> Author
Prevent Deletions:	<input type="checkbox"/>
Set Fields on Production document	<input type="checkbox"/> ViewIcon2&DataType=NUMBER&Value=155
Remove on Restore:	<input checked="" type="checkbox"/>
Set Fields on Archive document	<input type="checkbox"/>

Setup Settings	
Default Profile	Default = <blank> → Create a Profile document <ul style="list-style-type: none"> <li>When a default profile is specified, values from this Profile document will be included in new Database Definition documents (instead of the default values). The new Database Definition documents will also inherit the profile name.</li> <li>When the profile field on the Database Definition document is cleared, the Default DB Archive Settings will be assigned to this Database Definition document.</li> <li>Define a Profile in view 'Administration / Profiles ". See <a href="#">5. Profile documents</a> for further explanation.</li> <li>If a database is set up via a Profile, that Profile is used instead.</li> </ul>
During Setup, add Design elements automatically to the Production Database?	Default = Yes → Set to No if design elements have already been added to the mail template <ul style="list-style-type: none"> <li>See <a href="#">2.1 Setup Archiver</a> "Mail Design Template", this setting will add 6 Agents and 1 Form to the Production Database</li> </ul>
During Setup, automatically create Archive Databases?	Default = Yes <ul style="list-style-type: none"> <li>No = if you do not want to archive data, but instead just delete it or remove attachments</li> </ul>
Default Archive Server/s	Default = <blank> = Production Server <ul style="list-style-type: none"> <li>You can list servers using the format ProductionServer=ArchiveServer (e.g. ProdServer1/ACME=ArchServer1/ACME)</li> </ul>
Default Archive Path/s	Default = <blank> = Server's data directory

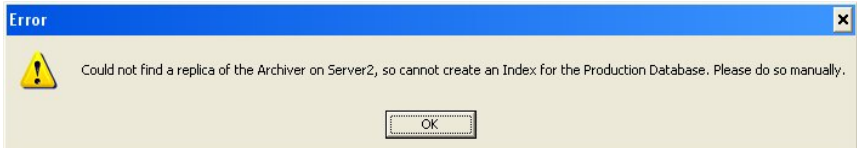
	<ul style="list-style-type: none"> <li>You can list paths using the format ProductionServer=ArchivePath. If this returns a NULL value, archives will be created in the root of the Archive Servers Data directory</li> </ul>
Default Archive Design Template	Default = <blank>
	<ul style="list-style-type: none"> <li>Will be used as the default value when creating Database Definitions, can be changed later</li> <li>Provide the template on the relevant servers for the Design task to update the designs</li> </ul>
Allow Owners to edit their Archive Criteria?	Default = No
	<ul style="list-style-type: none"> <li>If Yes, an owner can adjust the following settings in the Database Definition document: <ul style="list-style-type: none"> <li>Tab 'Archiving Criteria' (including Duplicate Email Handling)</li> <li>Tab 'Size Reduction Criteria' ONLY Warning Email</li> <li>Tab 'Archiving Options' EXCEPT Native Notes Mail Archiving</li> <li>Tab 'Searching'</li> </ul> </li> </ul>
Restrict Database Document Read access to Owners and Administrators?	Default = Yes
	<ul style="list-style-type: none"> <li>To avoid users having to see/replicate other users Mail Database information</li> <li>If a Mail Owner is not listed, Read Access is to all</li> </ul>
Archive Settings	
Replace documents in the Production Database with a Referral to the Archive, or Delete them?	Default = Replace
	<ul style="list-style-type: none"> <li>Replace – still shows the document in the DB through a link. By using 'Set Field on Production document you can add an icon if desired, to show that the document is archived.</li> <li>Delete – the document will be replaced by a referrer with a link to the Archive DB</li> <li>This setting does not apply to Quickr databases – in that case Production documents are always deleted.</li> </ul>
Compress attachments during Archive?	Default = No
	<ul style="list-style-type: none"> <li>Zipping saves disk space</li> <li>Zipping takes longer</li> <li>Zipping makes it impossible to search for the attachment</li> </ul>
Compress attachments using extensions	<ul style="list-style-type: none"> <li>Visible when "Compress attachments ..." = "Yes"</li> <li>Choose the extensions you want to compress. Default = doc, xls, pps, ppt, rtf, ntf, nsf</li> </ul>

Retain Folder Structure?	<p>Default = Yes</p> <ul style="list-style-type: none"> <li>• Preserve the folder structure in the archive database, this will take up performance</li> <li>• For Quicr databases the folder structure is always retained</li> </ul>
Limit Archive ACL Manager Access to	<p>Default = &lt;blank&gt; → add Admin(groups) and Server(groups)</p> <ul style="list-style-type: none"> <li>• Groups, Servers, Users and Roles</li> <li>• List the administrator and server groups here to get round problems later!</li> <li>• See 'Synchronise ACLs between Production and Archive DB?' in Global Settings</li> </ul>
Restrict all other Archive ACL Access to	<p>Default = &lt;blank&gt;</p> <ul style="list-style-type: none"> <li>• Only applied/compulsory if ACL Manager Access is limited</li> <li>• See 'Synchronise ACLs between Production and Archive DBS?' in Global Settings</li> </ul>
Set Fields on Production document	<p>Default = &lt;blank&gt;</p>  <ul style="list-style-type: none"> <li>• Only when Replace/Delete = 'Replace' (Referer stubs are used)</li> <li>• For example to display an icon a view</li> <li>• _ViewIcon Datatype = NUMBER &amp; Value = 138</li> <li>• Select 'Remove on Restore' to delete this field when a document is restored</li> </ul>
Set Fields on Archive document	<p>Default = &lt;blank&gt;, see above</p>

## 3.4 Default DB Search Settings

### Archive Defaults

Basics	Global Archive Settings	Default DB Archive Settings	Default DB Search Settings	Default DB Housekeeping Settings
<b>Search Settings</b>				
Enable Searching of Archive Database/s?	<input checked="" type="radio"/> Yes <input type="radio"/> No			
Auto Install Toolbar Search Icon?	<input checked="" type="radio"/> Yes <input type="radio"/> No			
<b>Search Results</b>				
Search Results/Page:	50			
Search Result Fields <a href="#">example</a>	Who senticon#@Name([CN];@If(DeliveredDate != "";@If(Principal = ""; From; Principal);SendTo) Date @Text(@If(DeliveredDate != ""; DeliveredDate; PostedDate)) Subject Subject Location @DBTitle			
Include Summary Text?	<input checked="" type="radio"/> Yes <input type="radio"/> No			
Field to use for Search Return Summary	Body			
What not to return in the Search Results				
Search word highlight color	<span style="background-color: red; color: red;"> </span> Bold <input checked="" type="checkbox"/>			
	<a href="#">clear</a>			

<b>Enable Searching of Archive Database/s?</b>	<b>Default = Yes</b>
	<ul style="list-style-type: none"> <li>• If set to "Yes", an FTI is created for both the Production Database and Archive Database during the setup</li> <li>• Up to five fields that can be searched, plus optional Summary field</li> <li>• If no FTI exists for the database and Searching is enabled, then you will be asked whether you want to create the FTI during Database Definition document save.             <ul style="list-style-type: none"> <li>◦ Error message when a replica of the Archiver cannot be found on the Production Server</li> </ul> </li> </ul>
	

Auto Install Toolbar Search Icon?	Default = No
	<ul style="list-style-type: none"> <li>If Yes, make sure that the design elements in the Production Databases are v265 or greater, specifically the '(SearchArchiveSystem)' agent</li> <li>You might prefer to email the Toolbar Installation button instead, using the Emails view</li> </ul>
Search Results/Page	Default = 10 → Set to 50
Search Result Fields	Default = formula
Include Summary Text?	Default = Yes
Field to use for Search Return Summary	Default = Body
What not to return in the Search Results	Default = <blank>
Search word highlight color	Default = black

### 3.5 Default DB Housekeeping Settings

#### Archive Defaults

[Basics](#) | 
 [Global Archive Settings](#) | 
 [Default DB Archive Settings](#) | 
 [Default DB Search Settings](#) | 
 **[Default DB Housekeeping Settings](#)**

**Housekeeping Settings**

Delete documents from the Archive/s after x days:  Leave if accessed

Automatic creation of new Archives:  Yes  No

When to automatically create new Archives:  Size  Time

Current Archive is greater than x MB:

Should old Archives be moved off the server or otherwise processed?:  Yes  No

Trigger to process/move old Archives:  No. Archives  Time

How many old Archives should be allowed?:

Location for moved Archives?:  Server  File Path  Existing  Delete

Server to move Archives to:

Server path to move Archives to:

Delete documents from the Archive/s after x days	Default = 0 (=indefinitely)
	<ul style="list-style-type: none"> <li>• 'Leave if accessed' determines if documents in the Archive should be ignored if they have been accessed within the specified deletion timeframe</li> </ul>
Automatic creation of new Archives	Default = No
	<ul style="list-style-type: none"> <li>• If Yes then: <ul style="list-style-type: none"> <li>○ Create new archive based on current size or time?</li> <li>○ 'Move old archives' = "Yes" (through replication/delete): <ul style="list-style-type: none"> <li>▪ Based on allowable number of archives on the server or based on time (days)?</li> <li>▪ Location to move old archives: <ul style="list-style-type: none"> <li>▪ Server → Path = new path + current path</li> <li>▪ File Path = local, starts with eg "c: \"</li> <li>▪ Existing = leaves the archive on the current</li> <li>▪ Delete = Delete the archive forever</li> </ul> </li> </ul> </li> </ul> </li> </ul>

Archiving can be configured in two ways:

- Database Definitions - settings for individual databases: If you want to manually set up specific Databases for archiving, open the All Databases view and create Database Definition documents for each database using the "1. Add Databases" button". This option will add Database Definition documents for each selected (set of) database(s).
- Profiles - default settings for a set of databases: Open the Profiles view and create a Profile that identifies the Databases you want to set up (e.g. the 'mail' Directory on Server X). Specify Yes to 'Automatically add & setup new Databases that match this Profile'. This will create Database Definition documents for databases that apply to the profile.

## 4. Database Definition Documents

1. Add Databases ▾

<ol style="list-style-type: none"> <li>1. Add all Databases from a Catalog</li> <li>2. Add all Databases from a Server</li> <li>3. Manually select a single Database</li> <li>4. Set up all existing Mail Archives on the current Server</li> </ol>
---

1. From Catalog.nsf on that server (Ctrl-Break does not, incidentally)
2. All databases from a selected server
3. A single database server
4. All mail databases from the current server

The (profile attached to the) Default Settings (see [3.3 - 3.5](#)) are automatically assigned to the Database Definition document. These can then be tuned for each database. A Database Definition document consists of the following tabs:

Archiving Criteria	Described in <a href="#">5.2 Archiving Criteria</a> Extra fields: <ul style="list-style-type: none"> <li>• Profile – when a profile is selected, the Database Definition document will inherit all values from this profile</li> </ul>
Size Reduction Criteria	Described in <a href="#">5.3 Size Reduction Criteria</a>
Archiving Options	Described in <a href="#">5.4 Archiving Options</a> and <a href="#">3.3 Default DB Archive Settings</a>
Archive Setup	Described in <a href="#">5.5 Archive Setup</a> and <a href="#">3.3 Default DB Archive Settings</a>

## Administrator

Click any field heading for help

Archiving Criteria | Size Reduction Criteria | Archiving Options | **Archive Setup** | Searching | Housekeeping | Setup Status | Last Archive Details

### Archive Setup

Database Archiving Enabled?  Yes  No

Owner/s  ▾

Allow Owner/s to edit Criteria?  Yes  No

Restrict Document Read access to Owners and Administrators?  Yes  No

### Database Details

[change database](#)

Server

File Path

Replica ID

Archive Server  ▾

Archive Path  ▾

Database Type:  Quickr  Standard

### Setup Options

During Setup, add Design elements automatically to the Production Database?  Yes  No

During Setup, automatically create Archive Databases?  Yes  No

Archive Design Template  ▾

Archiving Starts On

Send Archive Notification Email?  Yes  No

Create local Archive replicas for users  ▾

Extra fields:

- Owner/s – the Calendar Profile Owner
- Database Type – takes into account whether it is a normal or a Quickr database
- Archive starts on
  - Insert date. The Administrator determines the start date of the archiving process. The Global Settings (see [3.2](#))

	<p><a href="#">Global Archive Settings</a>) show the days of the week and time when the archiving agent should run.</p> <ul style="list-style-type: none"> <li>• Send Archive Notification Email?             <ul style="list-style-type: none"> <li>○ Yes/No (default = &lt;blank&gt;). Send an email to the user(s) x days before the archiving process starts</li> </ul> </li> <li>• Create local Archive replicas for users             <ul style="list-style-type: none"> <li>○ Users receive a mail with a button to create a local replica of the archive (same file path as the server).</li> </ul> </li> </ul>
Searching	<p>Described in <a href="#">5.6 Searching</a> and <a href="#">3.3 Default DB Archive Settings</a>            Extra fields (see <a href="#">12.4 Search Fields</a> in Discovery Search):</p> <ul style="list-style-type: none"> <li>• Person Field</li> <li>• Subject Field</li> <li>• Date Field</li> </ul>
Housekeeping	<p>Described in <a href="#">5.7 Housekeeping</a> and <a href="#">3.3 Default DB Archive Settings</a></p>
Setup Status	<p>Read-only fields containing information about the setup</p> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <p><b>Setup Status</b></p> </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <p>Access Production Database</p> </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <p>Create Profile Document and (optionally) Design Elements in Production Database</p> </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <p>Access/Create Archive DB</p> </div> <div style="border: 1px solid #ccc; padding: 5px;"> <p><b>Setup Check</b></p> </div>
Last Archive Details	<p>Read-only field containing information about the last archive run</p> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <p><b>Last Archive Details</b></p> </div> <p>No log data found.</p>

## 5. Profile documents

### 5.1 Basic

#### Profile: ACME

Click any field heading for help

Profiles provide active settings for all Databases using the Profile.

<b>Basics</b>	Archiving Criteria	Size Reduction Criteria	Archiving Options	Archive Setup	Searching	Housekeeping
<b>Profile Name</b>		ACME				
<a href="#">Help on Applying Profiles</a>						
Apply To Mail Users, Groups and O/OUs	Name	On Servers				
	Administrator/ACME Noel Hofman/ACME	ProdServer/ACME				
Apply To Directories	Path	On Servers				
<input checked="" type="checkbox"/> Include Subdirectories						
Apply Profile	<input checked="" type="radio"/> On Save <input type="radio"/> Scheduled		The Profile will be applied to existing Database Definitions when saving.			
Automatically add & setup new Databases that match this Profile?	<input checked="" type="radio"/> Yes <input type="radio"/> No		Auto enable Archiving: <input checked="" type="checkbox"/>			

- Apply To Mail Users, Groups and O/OUs
  - Select individual users, groups, and R / OUS using wildcard (\*)
  - Separate users override groups override OU override O
- Apply To Directories
  - Enter one or more paths
  - Specific path overrides Generic path
- 'Specific' overrules 'Generic' → Apply To Mail Users, Groups and O / OUs" overrules "Apply To Directories"

- Apply Profile
  - On Save – is done immediately, it may take some time
  - On Schedule – is done in the background through an agent
- Automatically add new setup & Databases that match this profile?
  - No = Database document is created, nothing more
  - Yes = "(AutoDatabaseSetup)" agent is run
- Automatically add & setup new Databases that match this profile? – This is the only way to automate database setup from a Profile (for a manual database setup from a Profile, see [5.5 Archive Setup](#))
- Auto enable Archiving – after automatic setup the archiving process starts immediately

## 5.2 Archiving Criteria

### Profile: ACME

Click any field heading for help  
 Profiles provide active settings for all Databases using the Profile.

Basics
Archiving Criteria
Size Reduction Criteria
Archiving Options
Archive Setup
Searching
Housekeeping

Basics

Duplicate Mail Document Handling Archive ▾  
[what is this?](#)

Criteria

1 **IF** Over 360 Days Old **AND** Not Accessed for 30 Days \* excluding Calendar Entries, Drafts  
**THEN** Archive Document [edit](#) [clear](#)

2 **IF** Over 60 Days Old **AND** Not Accessed for 60 Days **AND** Document Size over 10 MB  
**THEN** Delete Attachment/s [edit](#) [clear](#)

3 [new](#)

- Duplicate email handling to remove redundant email
  - Only applies to mail databases
  - Only works if Global Settings → Allow Duplicate Email Handling = Yes
  - Options: No Action (Default) / Archive / Delete
  - Acts on Replied/forwarded mail – compares to/from field, and then body and attachments. If an exact match is found, you can choose between archive/delete.
  - Performance – specify the amount of emails per database. 200 Mail (default) = 40-50 seconds processing time and approximately 20% of the duplicates
  - If strange characters are found, the agent will not process the mail
  - Can be adjusted by the Owner when the owner is allowed to edit the Archive Criteria in the Default DB Archive Settings
- Archive Criteria (administrator or user defined)
  - 10 sets of criteria
  - 3 Actions: Delete Document, Delete Attachment, Archive Document
  - Each criterion can make an estimation of the new free space
  - AND/OR options on the following items
    - Document x size
    - Document x days old
    - Document not modified x days
    - Document not accessed x days
    - Documents in the views/folders
    - Document complies with @ Formula

Criteria #1

**Archive criteria**

IF over x days old 120 ✓

or not accessed for x days 130 ✗

or not modified for x days 1

or in these views/folders

or document size

or matching this formula [check formula](#)

Exclude  Calendar Entries  Drafts \* applies to both Mail and Quickr

**ACTION** Archive Document

*Make sure that Calendar Entries and Drafts are always excluded*

## 5.3 Size Reduction Criteria

### Profile: ACME

Click any field heading for help  
Profiles provide active settings for all Databases using the Profile.



Basics	Archiving Criteria	<b>Size Reduction Criteria</b>	Archiving Options	Archive Setup	Searching	Housekeeping
--------	--------------------	--------------------------------	-------------------	---------------	-----------	--------------

---

**Size Reduction Criteria**

AFTER executing the Archive Criteria,  the  documents until the database size is  MB, in increments of  MB [each archive](#)

---

unless documents accessed within x days <input type="text" value="120"/>	<input type="text" value="and"/>	documents match this formula <input type="text" value=""/>	excluding <input checked="" type="checkbox"/> Calendar Entries <input checked="" type="checkbox"/> Drafts applies to both Mail and Quickr
---	----------------------------------	---	---

[check formula](#)

---

Disable Size Warning Email?  Yes  No

- Takes place after implementation of the Archive criteria
- Available actions are: Archive, Delete, Strip Attachments
- Maximum DB size without whitespace is set by the Administrator
- The action is performed on the basis of Size Reduction criteria (oldest or largest item) until the database size is met. This is done in steps of 50 MB according to the example above. This will prevent the agent to consume too much time on one database.
  - Actions on Size Reduction are performed on documents, unless these documents comply with rules based on:
    - Document accessed x days
    - Document complies to an @formula
- If the maximum size is not reached, the document is visible in the Definition Database Size Reduction Failed view
- If Disable Email Warning Size field is set to "No" (default, can be modified by the Owner), a configurable Size Reduction failure message is sent to the Owner
  - During setup
  - When the Size Reduction amount is not met
- Make sure that Calendar Entries and Drafts are always excluded

## 5.4 Archiving Options

Most fields are inherited from the Default DB Archive Settings and described in [3.3 Default DB Archive Settings](#)

### Profile: ACME

Click any field heading for help  
 Profiles provide active settings for all Databases using the Profile.

Basics	Archiving Criteria	Size Reduction Criteria	Archiving Options	Archive Setup	Searching	Housekeeping
--------	--------------------	-------------------------	-------------------	---------------	-----------	--------------

Archiving Options	
Replace documents in the Production Database with a Referral to the Archive, or Delete them?	<input checked="" type="radio"/> Replace <input type="radio"/> Delete
Retain Folder Structure?	<input checked="" type="radio"/> Yes <input type="radio"/> No <small>The Database Property 'Folder References Enabled' will be set, and all documents contained in folders will store the folder name.</small>
ZIP attachments during archive?	<input checked="" type="radio"/> Yes <input type="radio"/> No
ZIP attachments with extensions	<input type="text" value="doc; xls; pps; ppt; rtf; ntf; nsf"/>
For Quick Referrals, use the following string	<input type="text" value="This document has been archived, please open {this link} to access it."/>

Document Selection	
Never archive documents matching formula	<input type="text" value=""/> <a href="#">check formula</a>
Ignore the \$NoPurge field?	<input type="radio"/> Yes <input checked="" type="radio"/> No

Security	
Limit Archive ACL Manager Access to:	<input type="text" value="\$CPYServers&lt;br/&gt;\$CPYAdministrators&lt;br/&gt;LocalDomainAdmins&lt;br/&gt;LocalDomainServers"/>
Restrict all other Archive ACL Access to:	<input type="radio"/> Manager <input checked="" type="radio"/> Reader <input type="radio"/> Designer <input type="radio"/> Depositor <input type="radio"/> Editor <input type="radio"/> No Access <input type="radio"/> Author
	Prevent Deletions: <input type="checkbox"/>

Miscellaneous	
Set Fields on Production document <a href="#">use dialog</a>	<input type="text" value="'ViewIcon2&amp;DataType=NUMBER&amp;Value=155 '"/> Remove on Restore: <input checked="" type="checkbox"/>
Set Fields on Archive document <a href="#">use dialog</a>	<input type="text" value=""/>
Check & Disable any Native Notes Mail Archiving?	<input type="radio"/> Yes <input checked="" type="radio"/> No

Fields not inherited from the Default DB Archive Settings

- For Quickr Referrals, use the following string
- Ignore the \$ NoPurge field? → This is a Notes reserved field to prevent the document to be archived.
- Check & Disable Any Native Notes Mail Archiving?
  - Default = "No"
  - If "Yes", then the following happens:
    - Native Archiving is disabled
    - Native Archiving Criteria are copied to the Database Definition document
    - Sends a "Migrate Native Archiving 'mail to the owner
    - If Native Archiving is re-enabled by the user, a mail is sent to the owner again

## 5.5 Archive Setup

Most fields are inherited from the Default DB Archive Settings and described in [3.3 Default DB Archive Settings](#)

## Profile: ACME

Click any field heading for help  
 Profiles provide active settings for all Databases using the Profile.

- Basics
- Archiving Criteria
- Size Reduction Criteria
- Archiving Options
- Archive Setup
- Searching
- Housekeeping

### Archive Setup

Database Owner/s  Mail Owner  
 ACL Levels  
 ACL Roles  
 Other Users

Allow Database Owner/s to edit Criteria?  Yes  No

Restrict Database Document Read access to Owners and Administrators?  Yes  No

### Setup Options

Archive Server

Archive Path   
 For Quickr, all archives are created in the Quickr location on the server, using the format Place\_aX, where X is the archive number, e.g. \_a1Main.nsf

During Setup, add Design elements automatically to the Production Database?  Yes  No

During Setup, automatically create Archive Databases?  Yes  No

Archive Design Template

Fields not inherited from the Default DB Archive Settings

- Database Owner/s: Specify Database Owners:

Database Owner/s

- Mail Owner
- ACL Levels
- ACL Roles
- Other Users

ACL Levels

- Manager
- Designer
- Editor
- Author
- Reader

ACL Roles

- 

Other Users/Groups

- 

- Use the button on the Profile **Create & Setup Matching Databases Now** to manually create Database Profile Documents (and Archive Databases) for the databases that apply to this Profile document. For a scheduled setup of databases from a Profile, see [5.1 Basics](#)

## 5.6 Searching

All fields are inherited from the Default DB Archive Settings and described in [3.4 Default DB Search Settings](#)

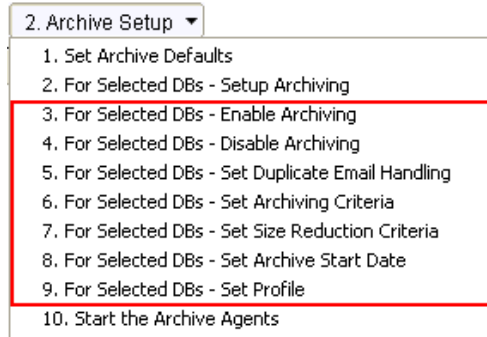
## 5.7 Housekeeping

All fields are inherited from the Default DB Archive Settings and described in [3.5 Default DB Housekeeping Settings](#)

## 6. Archive Setup (Actions)

### 6.1 Fine Tuning

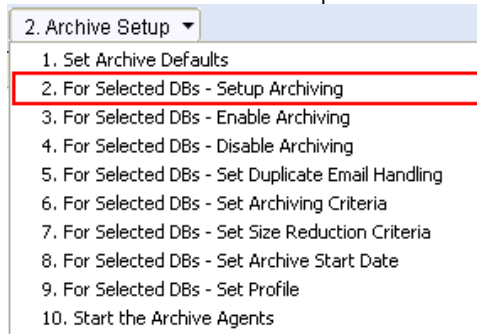
When Database Definition documents are added, they can be tuned by using the Archive Setup actions.



Note: Values that are entered in the Action pop-ups are kept in memory. The actions do not get the value(s) from the underlying definition document(s).

### 6.2 Setup Archiving

- Action 2 under 'Archive Setup' creates the Archives Databases for a set of/all databases. This is done by the client.

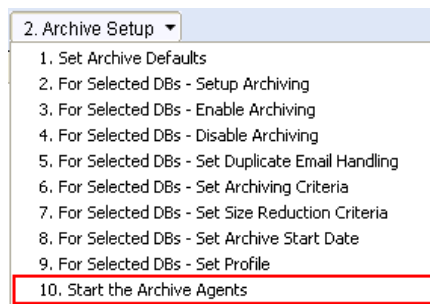


The Setup Archiving action on Database Definition documents processes as follows:

- Checks if the Production Database can be reached
- Adds a Profile document to the Production Database containing the location of the Archive Database
- Adds design elements to the Production Database if this is specified
- Creates the Archive Database and copies the folder structure if this is specified. You may skip this step by setting the 'During Setup, automatically create Archive Databases' setting to No in the Database Definition document.
- Creates FTI for the Production Database and Archive Database when Enable Searching is set to "Yes"
- Sends an email to the user when a local replica is needed

For the setup of databases from a Profile see [5.1 Basics](#) (scheduled setup) and [5.5 Archive Setup](#) (manual setup)

## 6.3 Start the Archive Agents



This action activates all Archiving agents and some other agents

Name	Trigger	Comment
✓ Archive Documents 0	🕒	Used to archive docs in archive databases
✓ Archive Documents Sched 1	🕒	Used to archive docs in archive databases
✓ Archive Documents Sched 10	🕒	Used to archive docs in archive databases
✓ Archive Documents Sched 2	🕒	Used to archive docs in archive databases
✓ Archive Documents Sched 3	🕒	Used to archive docs in archive databases
✓ Archive Documents Sched 4	🕒	Used to archive docs in archive databases
✓ Archive Documents Sched 5	🕒	Used to archive docs in archive databases
✓ Archive Documents Sched 6	🕒	Used to archive docs in archive databases
✓ Archive Documents Sched 7	🕒	Used to archive docs in archive databases
✓ Archive Documents Sched 8	🕒	Used to archive docs in archive databases
✓ Archive Documents Sched 9	🕒	Used to archive docs in archive databases
✓ AutoDatabaseSetup	🕒	
✓ DeleteOldSearches	🕒	
✓ EnableFolderRefs	🕒	Used to enable folder refs in production databases
✓ Housekeeping	🕒	Used to clean out Archive DBs
✓ ScheduledMigration	🕒	
✓ ScheduledReports	🕒	
✓ UpdateLocalReplicas	🕒	
✓ VerifyProfiles	🕒	

Agent	Description	Runtime
Archive Documents [Sched] X	<ul style="list-style-type: none"> <li>Archiving Documents</li> <li>'X' stands for db, so x = 2 archives database 2, 22, 32, etc</li> </ul>	<ul style="list-style-type: none"> <li>Archive Documents 0 runs every 15 minutes</li> <li>Archive Documents Sched 1 to 10 run every hour, only once a day</li> </ul>
AutoDatabaseSetup	Setup databases scheduled	<ul style="list-style-type: none"> <li>03:30 AM</li> </ul>
DeleteOldSearches		<ul style="list-style-type: none"> <li>01:00 AM</li> </ul>
EnableFolderRefs	Creates reference documents from documents that are backed	<ul style="list-style-type: none"> <li>01:45 AM</li> </ul>
Housekeeping	See <a href="#">5.7 Housekeeping</a>	<ul style="list-style-type: none"> <li>03:00 PM</li> <li></li> </ul>
ScheduledMigration	See <a href="#">7. Tools</a>	<ul style="list-style-type: none"> <li>03:30 AM</li> </ul>
UpdateLocalReplicas		<ul style="list-style-type: none"> <li>04:00 AM</li> </ul>
VerifyProfiles		<ul style="list-style-type: none"> <li>23:00 PM</li> </ul>

Agents run only once a day. If you want to run the agent again, choose 'Stop the Archive Agents' and then 'Start the Archive Agents.' CAUTION: other agents will also restart and run immediately (for instance the Housekeeping agent). You possibly have to re-sign the agents after you stopped them.

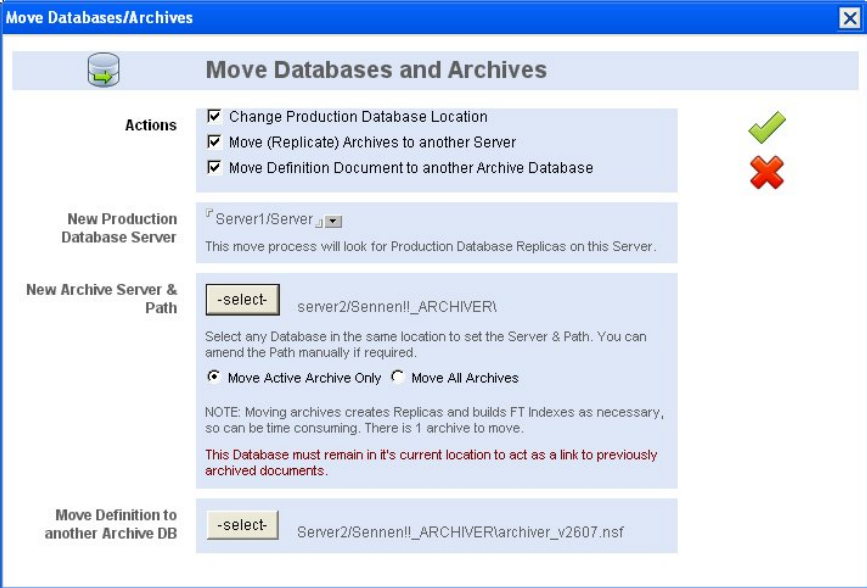
Agent 'Archive Documents Sched X' runs consecutively from:

- Native Archiving
- Archiving Criteria
- Size Reduction Criteria
- Sends Local Replica Creation email

## 7. Tools (Actions)

3. Tools ▾
<ol style="list-style-type: none"> <li>1. For Selected DBs - Enable Searching</li> <li>2. For Selected DBs - Disable Searching</li> <li>3. For Selected DBs - Allow Owner to Edit</li> <li>4. For Selected DBs - Prevent Owner from Editing</li> <li>5. For Selected DBs - Add Owner to Local Replica List</li> <li>6. For Selected DBs - Clear Owner from Local Replica List</li> <li>7. For Selected Mail DBs - Disable Native Archiving</li> <li>8. For Selected Mail DBs - Allow Native Archiving</li> <li>9. For Selected Mail DBs - Resend 'Migrate Native Archive' email</li> <li>10. For Selected DBs - Resend 'Create Local Replica' email</li> <li>11. For Selected DBs - Resend 'Archive Start Date' email</li> <li>12. For Selected DBs - Send 'Migrate Local Data' email</li> <li>13. For Selected DBs - Send 'Install Toolbar Icon' email</li> <li>14. For Selected DBs - Update Archive Design Elements</li> <li>15. For Selected DBs - Move Database/Archives</li> <li>16. For Selected DBs - Find Orphaned Stubs</li> <li>17. Ignore Schedule - Archive Immediately</li> </ol>

<p>Activate/Deactivate 1 – 4, 7, 8</p>	<ul style="list-style-type: none"> <li>• Searching</li> <li>• Editing by Owner</li> <li>• Native Archiving (mail database)</li> </ul>								
<p>Add/Remove Owner 5 – 6</p>	<ul style="list-style-type: none"> <li>• Local Replica list</li> </ul>								
<p>Send Email 9 – 13</p>	<ul style="list-style-type: none"> <li>• Create New Local Replica (mail to "Create local replicas for archive users') button to</li> <li>• Archive Starting on Date (if 'Send Notification Email Archive "within time range falls to link to Database Definition Document)</li> <li>• Migrate to a Local Database Mail button</li> <li>• Install Toolbar Icon button</li> <li>• Native Archive button to Migrate Mail</li> <li>• Size Warning Mail to inform on Size Reduction Criteria</li> </ul> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="background-color: #f2f2f2;">Email Type</td> </tr> <tr> <td>Archive Starting on Date X</td> </tr> <tr> <td>Archive Starting on Date X, Allow Edit</td> </tr> <tr> <td>Create New Local Replica</td> </tr> <tr> <td>Install Toolbar Icon</td> </tr> <tr> <td>Migrate a Local Database Mail</td> </tr> <tr> <td>Migrate Archive Mail</td> </tr> <tr> <td><u>Size Warning Mail</u></td> </tr> </table>	Email Type	Archive Starting on Date X	Archive Starting on Date X, Allow Edit	Create New Local Replica	Install Toolbar Icon	Migrate a Local Database Mail	Migrate Archive Mail	<u>Size Warning Mail</u>
Email Type									
Archive Starting on Date X									
Archive Starting on Date X, Allow Edit									
Create New Local Replica									
Install Toolbar Icon									
Migrate a Local Database Mail									
Migrate Archive Mail									
<u>Size Warning Mail</u>									

<p>Update Design 14</p>	<ul style="list-style-type: none"> <li>• Update Archive Design Elements: Add or remove design elements to the selected database/s</li> </ul>
<p>Move Database/Archives 15</p>	<ul style="list-style-type: none"> <li>• Move Database / Archives, automatic process</li> </ul>  <ul style="list-style-type: none"> <li>• The Administrator needs to move the Production databases itself and can then change the Production database location in the Archiver database</li> <li>• The Archives and/or Definition Documents can be moved to the new location by this process</li> <li>• The Archiver database itself needs to remain in its existing location to act as a link between the new Archive location/s and any Archive stubs in the Production database</li> </ul>
<p>Find Orphaned Stubs 16</p>	<ul style="list-style-type: none"> <li>• Finds Orphaned stubs of archived documents in the Production database and places them in a temporary view.</li> </ul>
<p>Archive Immediately 17</p>	<ul style="list-style-type: none"> <li>• Ignores the Archive schedule and starts archiving within 5 minutes. Mainly used for testing.</li> </ul>

## 8. Drag-Drop Archiving

- Copy the following elements to the mail template manually:
  - Folder 'Archive'
  - Script Library 'IO Archive Routines' (when not already done in [2.1 Setup Archiver](#))
  - Agent '(ZipFilesUser)'
- To enable Drag-Drop Archiving for all views/folders, the code below should be added to these views/folders (the QueryAddToFolder subroutine code is already available in the 'Archive' folder). To enable Drag-Drop Archiving for all new and existing views/folders, do the following:
  - Add the code below to the '(\$Inbox)' folder of the mail template (by using the Signer/Admin ID)
  - Make sure the design of the current databases is updated with this template
  - Load convert -u mail \ \* will convert all folders of the mail database(s) to the design of the Inbox

### *OPTIONS*

*Use "IO Archive Routines"*

### *SUB QUERYADDDTOFOLDER*

*'START IONET Routine to manually Archive Documents via drag-drop*

*If Lcase(Target) = " archive" Then*

*Call ArchiveDocs(source.Documents)*

*continue = False*

*End If*

*'END IONET Routine to manually Archive Documents via drag-drop*

## 9. Deleting Documents

If you are using Archive Referer Stubs, you can configure your environment to delete the archived document when the Stub is deleted, and vice-versa.

- Add the "IO Archive Routines" script library to the Production (if not already done) and Archive Databases
- Edit the Database Script and add the following line to the Options event: Use "IO Archive Routines"
- If you are using SOFT deletions (e.g. mail)
  - Add to the END of the QueryDocumentdelete event:  
*'START IONET Routine to delete archived documents from stubs*  
*Call IOQuerydocumentdelete(source.Documents)*  
*'END IONET Routine to delete archived documents from stubs*
  - Add to the START of the QueryDocumentundelete event:  
*'START IONET Routine to restore archived documents from stubs*  
*Call IOQuerydocumentundelete(source.Documents)*  
*'END IONET Routine to restore archived documents from stubs*
- If you are using HARD deletions (e.g. NOT mail)
  - Add to the START of the PostDocumentdelete event:  
*'START IONET Routine to delete archived documents from stubs*  
*Call IOPostdocumentdelete(source.Documents)*  
*'END IONET Routine to delete archived documents from stubs*

## 10. iNotes/DWA Archiving

- Download the iNotes Forms database from <http://www.ionetsoftware.com/A55B82/ionethome.nsf/ArchiveCond?OpenForm>
    - Copy the design elements from this database into your forms7.nsf, forms8.nsf or forms85.nsf (depending on your server release). You may need to open these formsX.nsf databases locally with a client first to give yourself ACL access.
      - Form
        - FormsMap → replace / select "Prohibit ..." [forms8 (x)]
        - s\_ArchiveRefererEditCode
        - s\_ArchiveRefererReadCode
      - View
        - System \ Forms | s\_FormsMap → replace / select "Prohibit ..."
      - Subform
        - s\_ArchiveRefererDictionary
        - s\_ArchiveRefererEdit
        - s\_ArchiveRefererEdit\_Init
        - s\_ArchiveRefererRead
        - s\_ArchiveRefererRead\_Init
      - Document
        - ArchiveReferer
1. If the Archive Server is different from the Production Server, Adjust the s\_ArchiveRefererRead Subform from:
- ```
<script>window.location="/" + window.refererDB + "/($all)/" + window.refererUNID+
"/?OpenDocument&Form=h_PageUI&PresetFields=s_ViewName;(%24All),s_FromMail;1,s_SortBy;5,s_HiddenCols,%2498,s_UnreadOnly;0;s_HideRem
oteImage;1&ui=classic"; </script>
```
- to:
- ```
<script>window.location="http://archiveserver.host.name/" + window.refererDB + "/($all)/" + window.refererUNID+
"/?OpenDocument&Form=h_PageUI&PresetFields=s_ViewName;(%24All),s_FromMail;1,s_SortBy;5,s_HiddenCols,%2498,s_UnreadOnly;0;s_HideRem
oteImage;1&ui=classic"; </script>
```
- where <http://archiveserver.host.name> is the hostname of the Archive Server.
2. Copy the document in the view 'System\Forms' to your formsX.nsf database
3. Then refresh iNotes by (all steps are important):
- Logging off iNotes and closing your browser
  - issue "dbcache flush" on the server
  - stop and restart the HTTP task on your server ("tell http restart" command)

- open your browser and clear the browser cache
- launch iNotes

To include a search iframe in the iNotes/DWA client for R8.5.1, please follow these instructions (note that the Archive Server must be R8.5.1+, running HTTP).

#### EITHER

Download our pre-built iNotes Customisation database from <http://www.ionetsoftware.com/A55B82/ionethome.nsf/ArchiveCond?OpenForm>, sign it and add to the iNotes folder of your Domino Server, then edit the Custom\_Masthead subform and point the iframe src parameter to your Archiver Database.

#### OR

Create an iNotes 8.5.1.Extension Forms Database

1. From Domino Designer or the Lotus Notes client, click File - Application – New.
2. In the Specify New Application Name and Location section, select your Domino server.
3. For "File name" enter "Forms85\_x.nsf" and locate it in the iNotes directory under the Domino Data directory.
4. In the Specify Template for New Application section, select your Domino server.
5. Check "Show advanced templates."
6. Select the "Lotus iNotes Extension Forms (8.5)" template (Forms85\_x.ntf).
7. Make sure "Inherit future design changes" is not checked.

Open the new database in Designer and add the following to the relevant subform:

Custom\_Masthead subform

Add at the bottom:

```
<iframe id="ioftsm" class="ioftsm" align="left" scrolling="no" height="35" width="600" frameborder="0" src="/archiver.nsf/SearchFrame?OpenForm&RestrictTo=mail" allowtransparency="true"></iframe>
```

Where archiver.nsf is the path of the Archiver database

Custom\_CSS subform

Add at the bottom:

```
.s-masthead-height {  
height: 35px;  
}  
.s-masthead-padding {  
margin-top: 5px;  
}  
<NotesComment>
```

```
// CSS to hide the standard Search when using the IONET Archiver
</NotesComment>
.s-rightpanel .s-nodisplay {
display: none !important;
}
#e-ftsearch-container {
display: none !important;
}
#e-ftsearchtext {
display: none !important;
}
#e-ftsearch {
display: none !important;
}
#e-ftsearch-clear {
display: none !important;
}
```

Then refresh iNotes by (all steps are important):

- Logging off iNotes and closing your browser
- issue "dbcache flush" on the server
- stop and restart the HTTP task on your server ("tell http restart" command)
- open your browser and clear the browser cache
- launch iNotes

## 11. Reporting

The Reports view contains a button that generates reports. The following reports are available:

- Reporting on the amount of data and/or the number of documents that has been archived
- Reporting to compare the production and the archived size of documents/data
- Reporting on the Size Reduction

Furthermore you can make a specifications to:

- Users, Groups and Organization/Organization Unit
- Directories
- Specific Databases
- Selected Production servers
- Selected Archive servers
- Time span (except for Size Reduction reports)

Reports can be

- Views in graphical (Flash) or text format
- Exported to CSV
- Created manually or scheduled and sent to interested users automatically. You then need to indicate the frequency of the reporting agent to run, over what time period should be reported (previous number of days) and any to whom the reports should be sent.

Data for the reports is provided in the Report Data view. Reports can be viewed as Charts using the “View Chart” button. The HTTP task should be available on the Archiving server, because charting uses Flash objects.

## 12. Discovery Search

This is a search method available for Administrators only. Administrators can search at a field level across production and archive databases, simultaneously.

- The current limit is 1,000 databases
- It is highly recommended that each database has a Full Text Index
- The first 5,000 results will be sorted in order of relevance and the top x (depending on the Maximum Results Search option) will be returned
- The more accurate the query, the faster the search process will be

### 12.1 Query Builder

Query Builder

Search By [Text](#) [Field](#) [Author](#) [Date Created](#) [Date Modified](#)

OK  
Cancel

or	Text	contains	
or	Field	contains	
or	Author	contains	
or	Date Created	is after	16
or	Date Modified	is after	16

### 12.2 Search Options



- Show DB Results – How the search results are displayed. Individually per Database or Mixed.
- Sort Results By – The Sort of the results. When displayed individually, the choices are: Relevance, Creation Date Ascending/Descending.
- Selectable Results – If the Result Set should be selectable or not.

## 12.3 Search Scope

### [Search Scope](#)

Database Type	<input type="checkbox"/> Production Databases	<input checked="" type="checkbox"/> Archives
Users, Groups and O/OUs	<a href="#">tips</a>	▾
Directories	<a href="#">tips</a>	▾
Specific Databases	<a href="#">tips</a>	▾
Limit to Production Servers	<a href="#">tips</a>	▾

- Users, Groups and O/OUs – individual names in Abbreviated format, Groups or O/OU levels
- Directories – use "root" for the root directory

## 12.4 Search Fields

Document Contains [tips](#)

and  or

Person Contains [tips](#)

and  or

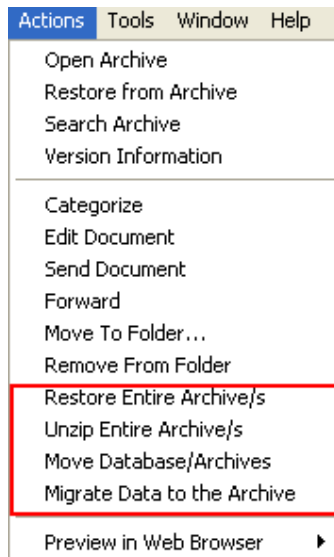
and Subject Contains [tips](#)

and Date is between [tips](#)  and  ago [Clear](#)

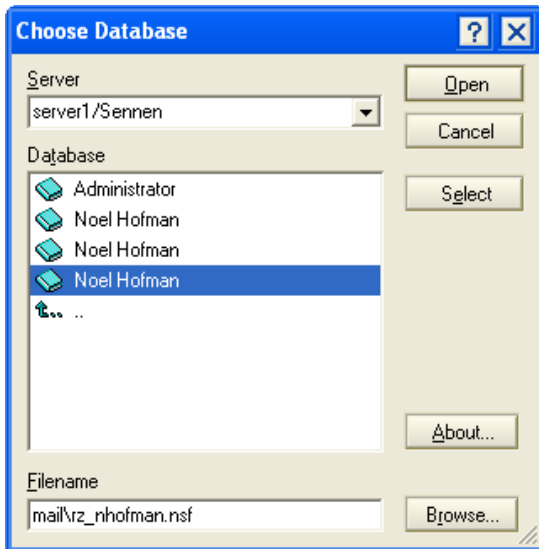
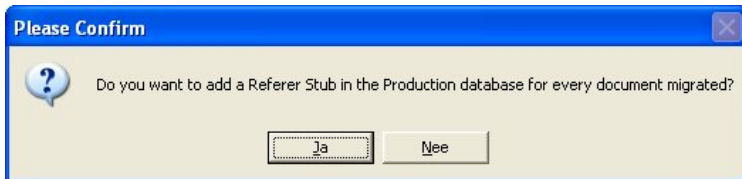
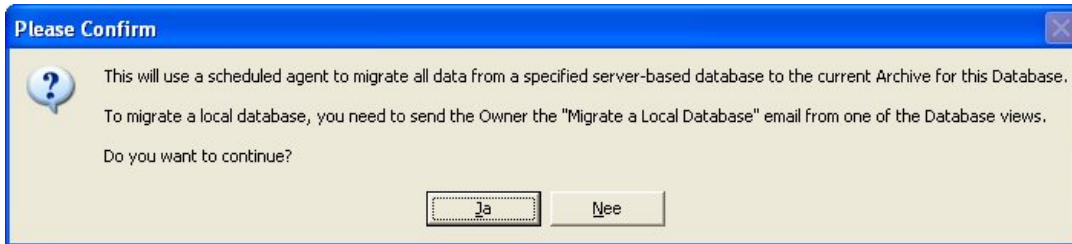
- Document Contains – Any string in the document, includes Attachments and Rich Text. You can include any FT search query, e.g. Wildcards, [CustomField] searches etc.
- Person Contains – Any string in the “Person” field
  - in mail: From, SendTo, CopyTo, BlindCopyTo, Principal
  - in other databases: as specified in the DBInfo document (See Searching in [4. Database Definition Documents](#))
- Subject Contains – Any string in the “Subject” field
  - in mail: Subject
  - in other databases: as specified in the DBInfo document (See Searching in [4. Database Definition Documents](#))
- Date is between – Any string in the “Date” field
  - in mail: DeliveredDate or PostedDate
  - in other databases: as specified in the DBInfo document (See Searching in [4. Database Definition Documents](#))

## 13. Administrator Actions on Database Definitions

When a database definition document is opened, 4 options will appear for the Administrator under the Actions menu.



- Action Restore Entire Archive/s retrieves all data from the archive and writes it back to the production database.
- Action Unzip Entire Archive/s unzips all zipped attachments in the Archive database(s) that is/are selected from the prompt. Unzip occurs when the scheduled "(Unzip)" agent runs.
- Action Move Database/Archives moves the Archiver Database, Archive(s), Database Definitions. See Move Database / Archives in [7. Tools](#).
- Action Migrate Data to the Archive migrates all data from a selected database to the archive of the database through agent 'ScheduledMigration'. For migrating local databases, the Admin can send the user to send an email with a button 'Migrate Local Data'



## 14. Tips & Tricks

- Adding design elements to the mail template can be done by including the template in a Database Definition document, and then edit/resave this document. After that choose: “3. Tools / 14. For Selected DBs - Update Archive Design Elements” and then “Add/Update IONET Design Elements”
- Set the Archiving criteria to 5000 days when archiving is done for the first time. In most cases the agent will then only create empty archives without starting the actual archiving process. When this is done, you can decrease the number of days.

**Criteria #2**

**Archive criteria**

**IF** over x days old 5000

**and** not accessed for x days

and not modified for x days

and in this viewfolder

and document size

and matching this formula [tips](#) [check formula](#)

Exclude  Calendar Entries  Drafts \* applies to both Mail and Quickr

**ACTION** Archive Document

- Archiving in a cluster also functions when a server in the cluster is unavailable
- If agents do not function properly, or need run again, then re-sign the agents. I think stop/start all the agents is sufficient
- When using iNotes archiving, you need to copy the DWA forms. See [10. iNotes/DWA Archiving](#)