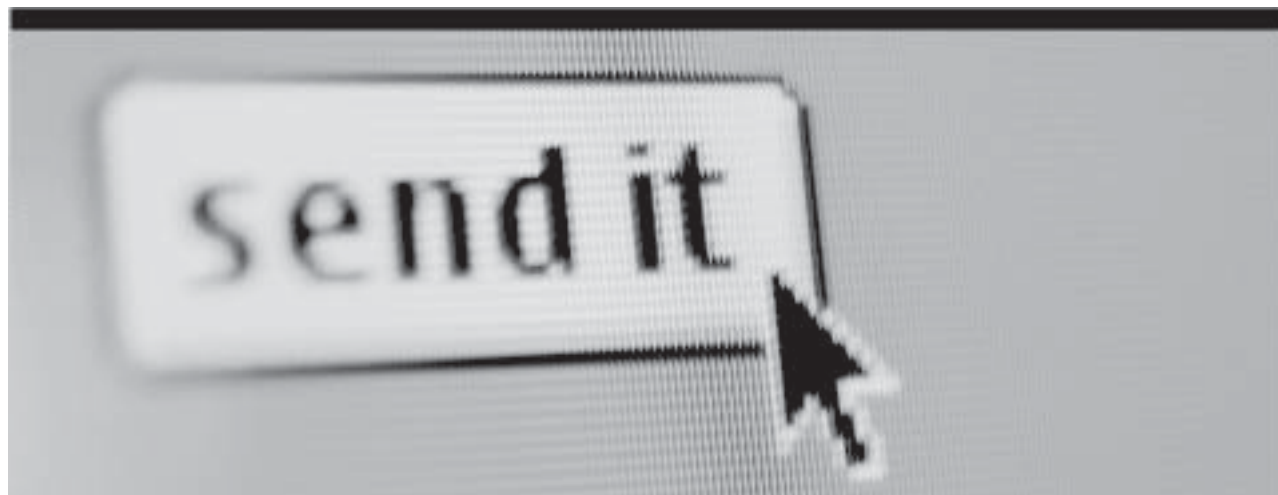


# Mailbox Policy Manager Administrator Guide



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**MessageLabs™**

**SYMANTEC HOSTED SERVICES™**



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# About This Book

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This chapter contains the following sections:

- ["Intended Audience" on page vii](#)
- ["Conventions" on page vii](#)
- ["Product Documentation" on page viii](#)

## Intended Audience

This book describes actions reserved for those with administrative privileges. Its content assumes that you are an administrator for the product and have a strong general knowledge of system and network administration. Depending on how the product is configured for your organization, some features described in the documentation may not be available to you.

## Conventions

The documentation uses certain typographical conventions to make references to product elements easier to recognize and understand. These are described in the following table.

**Table A-1** Typographical Conventions

Display Format	Definition	Examples
<a href="#">blue, underscore</a>	A hyperlink to either another location within the document or to a web site.	For more information, see <a href="#">"Product Documentation" on page viii</a> .
<b>bold</b>	Name of a screen, section, pane, box, or option in the user interface.  The name of an executable file.	On the <b>Select Permissions</b> page, locate the <b>Access Info</b> pane of the <b>User Account</b> panel.  To begin the installation, double-click <b>setup.exe</b> .
<b><i>Bold italic</i></b>	The name of a menu, button, or tab.	From the <b>Start</b> menu, select <b>Programs</b> .
serif	An entry you must type manually.  A value you type in a box or select from a list.  A field value that appears in the user interface.	At the command prompt, type <code>cmd</code> .  From the <b>Filter</b> drop-down list, select <code>Starts with</code> .  The <b>Source</b> field now reads <code>Imported from File</code> .

# Product Documentation

The following materials are available for MessageLabs Hosted Email Archive:

- *MessageLabs Hosted Email Archive User Guide*  
This document explains how to use MessageLabs Hosted Email Archive, such as how to access and search historical email.
- *User's Guide to Storage Management*  
This document describes how the storage management features works, and teaches users how to view stored documents.
- MessageLabs Hosted Email Archive Search Help page  
Accessible from the Archive Search page in the user interface, the MessageLabs Hosted Email Archive Search Help page provides guidance on using the simple and advanced search modes.

For the latest version of any document, contact Support.



# 1 About the Mailbox Policy Manager

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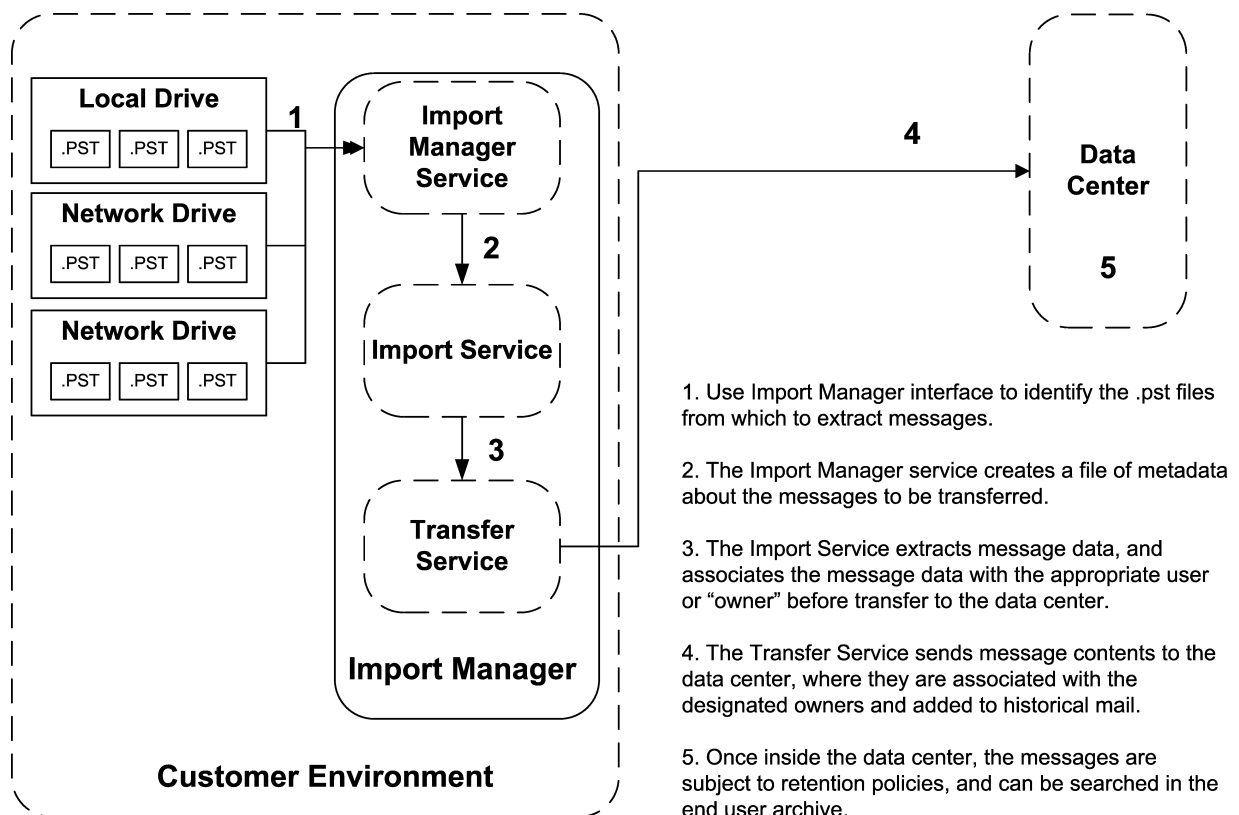
## Features

The Mailbox Policy Manager allows you to:

- Import mail messages from local information stores into the MessageLabs Hosted Email Archive data center. Supported *information store types* are PST files, Exchange mailboxes, and Public Folders.

Messages brought into the data center via the import function are associated with the specified user (either manually or automatically), are subject to retention policies, and are searchable through a user's personal email archive. For example, if your organization has recently signed up for MessageLabs Hosted Email Archive, collection and storage of users' mail begins from the time archive is enabled. This service lets you to archive email that had been sent or received prior to the date MessageLabs Hosted Email Archive began collecting mail.

See ["Mail Import" on page 15](#) for more information on these features.



**Figure 1-1 Message Transfer to Data Center**

- Enforce your organization's retention and deletion policies across specified information stores.
- Produce reports about the information available in the specified information stores.
- Install the Desktop Agent on your end users' machines to allow the Mailbox Policy Manager server to access and act on PSTs located on users' local machines.

This optional feature may not be available to your organization. Contact Support for more details.

## Limitations

- Only unlocked PST files can be imported; that is, Outlook cannot have the PST open while the system attempts to process the file. The system skips the open file and logs the attempt.
- Unicode and ANSI PST files are supported.
- The maximum size for import files is 2 gigabytes (GB) for PST files created by versions of Outlook prior to Outlook 2003. The maximum PST file size is 20-GB for PST files generated by Outlook 2003 or higher with Unicode encoding. (These are Microsoft Outlook file size limitations.)
- Verify that a retention policy applies to the owner to which you plan to assign the PSTs, otherwise they will not be imported. Also verify that the time frame for that user's retention policy includes the dates for which mail is being imported, otherwise it will not be transferred to the data center.
- Although the Desktop Agent allows you to process PSTs on a user's machine with the same Mailbox Policy Manager rules, conditions, and actions available to any other type of information store, it does not allow you to import the messages in a local PST into MessageLabs Hosted Email Archive. To import these messages, you must copy any local PST files to a network-accessible location, then follow the instructions under ["Importing Messages to the MessageLabs Hosted Email Archive Data Center" on page 15](#).

## Before Importing Mail—Best Practices

- Although this step is not required, you may want to gather PST files together in a local directory to simplify the import process.
- Because the default name used when creating PSTs does not identify users, MessageLabs recommends that you either incorporate the user name in the directory containing a user's PSTs, or rename the PST files to identify the user.
- If mail is to be available in the user's personal archive, only one user per PST file is allowed. However, messages from multiple PST files can be imported for a single user.
- If mail does not need to be made available in the user's personal archive, or if this feature is being used for e-Discovery only, multiple users' mail can be gathered in a single PST and imported into a designated owner's mailbox. If you are importing mail for e-Discovery purposes only, you can assign the e-Discovery owner as the owner of all mail to be imported. This imports all messages into the e-Discovery owner's searchable archive.

## For More Information

More information is available in the Mailbox Policy Manager online help. To access the help, click the **Help**  icon.



## 2 Installation and Configuration

---

### Installing Mailbox Policy Manager

#### Hardware Requirements

The Mailbox Policy Manager requires **dedicated hardware**; you cannot install it on either your MessageLabs Hosted Email Archiving & Continuity (EAC) Services server or your VaultBox server.

---

**CAUTION No Microsoft Exchange on the Mailbox Policy Manager Machine**

Microsoft Exchange, including Exchange management tools, cannot be installed on the Mailbox Policy Manager Server.

---



---

**CAUTION No VaultBox Designation for the Mailbox Policy Manager Machine**

The Mailbox Policy Manager Server cannot be used as a VaultBox.

---

Minimum hardware requirements for the Mailbox Policy Manager Server are:

**Table 2-1 Server Minimum Hardware Requirements**

Component	Minimum Required
Processor	Pentium® III, 500 MHz
Memory	256 megabytes (MB) RAM (512-MB recommended)
Free Disk Space	At least five GB, possibly more depending on the number of users. For a more detailed calculation: <ol style="list-style-type: none"> <li>1 Find the size of each information store you want to import. Find the size either from the Exchange System Manager or the PST files.</li> <li>2 Multiply that number by three.</li> </ol>
Operating System	Windows XP (SP2/SP3) (x86), Windows Vista (x86, x86-64), Windows Server 2003 (x86, x86-64), or Windows Server 2008 (not Server Core, x86, x86-64)

#### Software/Service Requirements

To use the system, your organization must have:

- Purchased MessageLabs Hosted Email Archive.



- Installed MessageLabs Hosted Email Archiving & Continuity (EAC) Services software on the EAC server, and performed a Directory Sync using the SyncManager. Any user/mailbox for whom you want to import mail must be present in EAC.
- Set MessageLabs Hosted Email Archive retention policies for all users who will be designated as owners of an information store. The owner of an information store is the individual with whom a message is associated in the data center. The owner may or may not be the recipient or sender of the message.

On the Mailbox Policy Manager Server, you must have or install:

- **Windows XP (SP2/SP3), Windows Server 2003, or Windows Server 2008 (not Server Core), Windows Server 2008 R2**
- **Outlook 2003 or greater.** The system uses the same ActiveMailbox installer application as Historical Mail/MessageLabs Hosted Email Archive. This installer checks to see if Outlook 2003 is present. If Outlook 2003 is present, the import application is installed onto the server. If Outlook 2003 is not present, the Historical Mail/MessageLabs Hosted Email Archive features are installed.
- **If using Outlook 2007 SP2**, you *must* install the Outlook 2007 hotfix package available from Microsoft: <http://support.microsoft.com/kb/968858>

---

**NOTE Use the Newest Version of Outlook That Has Been Used to Generate the PST Files You Will Import**

If some of your users are running an older version of Outlook (such as Outlook 2003), but others are running a newer version (such as Outlook 2007), it is recommended that you use the newer version (Outlook 2007) on the server.

- 
- **Windows Installer 4.5+** This must be downloaded from Microsoft and installed manually.
  - **Microsoft Visual C++ 2008 Redistributable Package (x86).** The installer provides this during the install process if not already present.
  - **Adobe Acrobat Reader software**, v6.0 or later, for viewing this document electronically. You can download the latest version of this application at no cost from Adobe Systems, Inc. [www.adobe.com](http://www.adobe.com).

The Mailbox Policy Manager Server must be a member of the domain and have access to at least one Exchange server.

## Account Requirements

Use the MessageLabs Hosted Email Archiving & Continuity (EAC) Services service account to run Mailbox Policy Manager. This account must have administrative rights to:

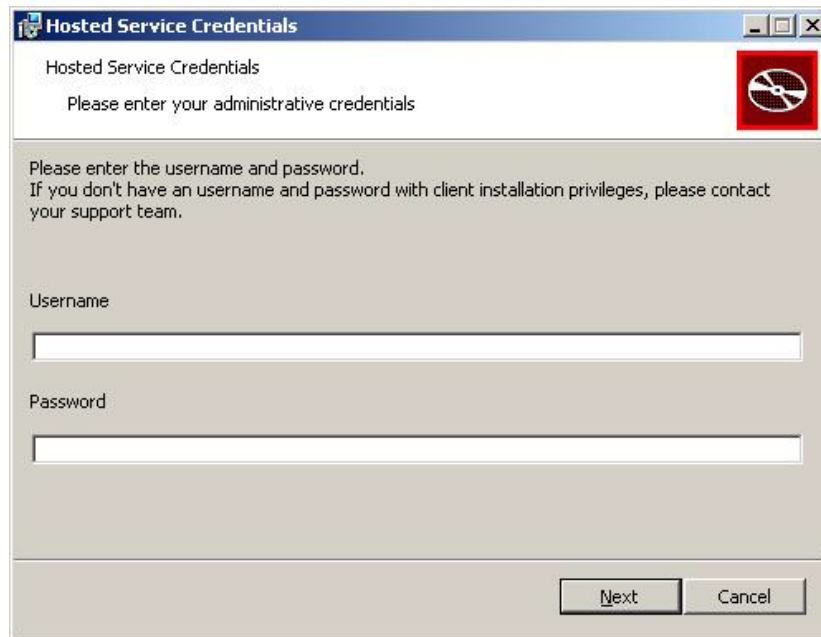
- The Mailbox Policy Manager server.
- All information stores from which mail is to be imported.

- The network share on which PSTs are stored, if they are stored on a network drive (read/write permissions).
- MessageLabs Hosted Email Archiving & Continuity (EAC) Services software. (Administrator-level permissions are required to install the software, but not to run it.)

## Installing the Server Software

### To install the software on its dedicated server:

- 1 Access your installation package provided by Support. Locate and double-click **ems.msi**.
- 2 The InstallShield Wizard launches and guides you through the installation process. At the Welcome window, click **Next**.
- 3 In the **Hosted Service Credentials** window, enter the root user name and password. If you don't have this information, contact Support. Click **Next**.



Hosted Service Credentials

Please enter your administrative credentials

Please enter the username and password.  
If you don't have an username and password with client installation privileges, please contact your support team.

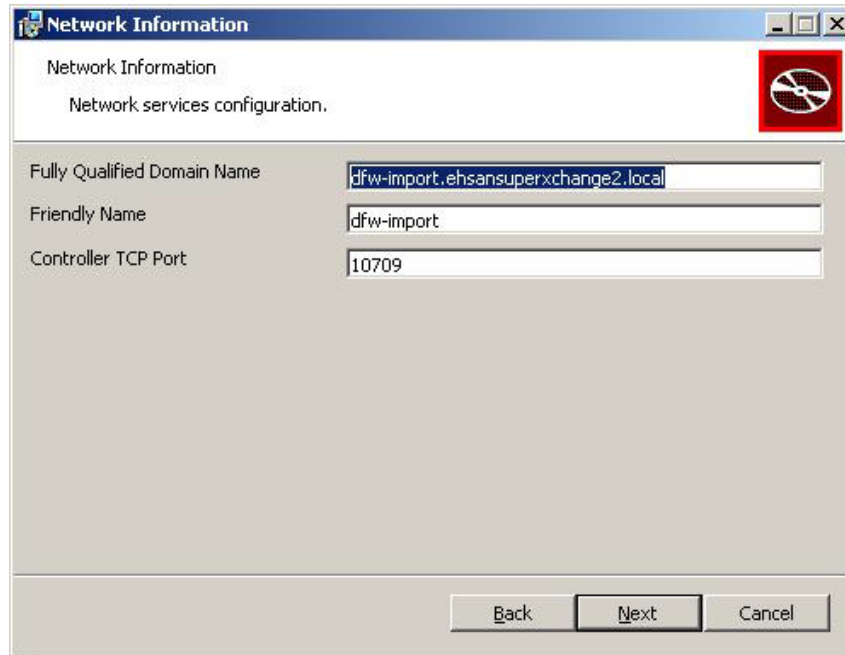
Username

Password

Next Cancel

- 4 The installer prompts you to install any required software if it is not already installed.
- 5 The **Available Components** window tells you which components are available to install. Click **Next**.
- 6 Select the components you want to install, then click **Next**.
- 7 The **Destination Folder** populates by default. Click **Next** to accept the installation location, or click **Browse** to set a new location.

- 8 In the **Network Information Name** window, enter the address for the specific VaultBox system.

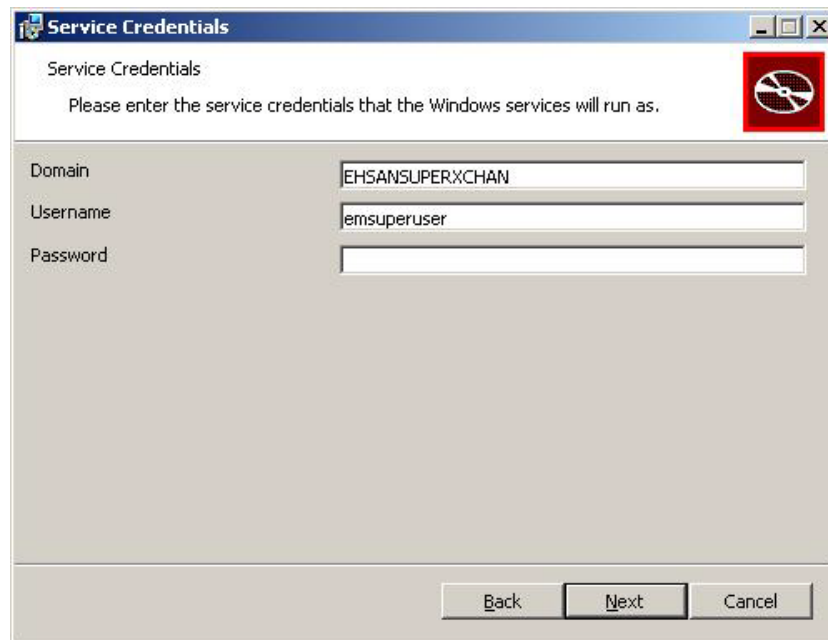


The screenshot shows a dialog box titled "Network Information" with a red "X" icon in the top right corner. The text "Network Information" and "Network services configuration." is displayed. Below this, there are three input fields: "Fully Qualified Domain Name" containing "dfw-import.ehsansuperexchange2.local", "Friendly Name" containing "dfw-import", and "Controller TCP Port" containing "10709". At the bottom, there are three buttons: "Back", "Next", and "Cancel".

**NOTE VaultBox is Not Installed**

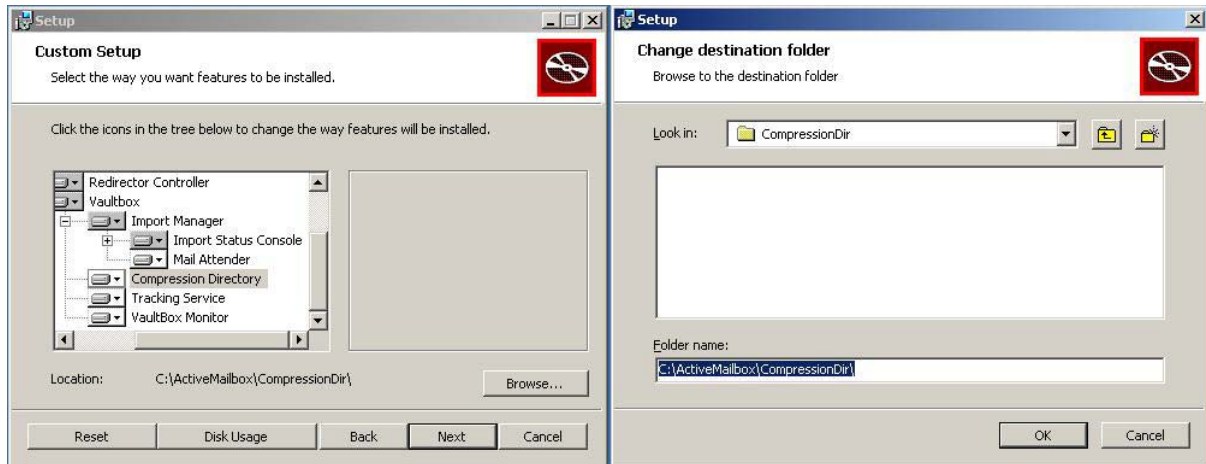
Although you must provide information in this window, the VaultBox instance installed on this machine is only a partial installation to be used for import tasks. This instance cannot be used as a complete VaultBox installation.

- 9 In the **Service Credentials** window, enter the requested domain, username, and password for the account. Click **OK**.

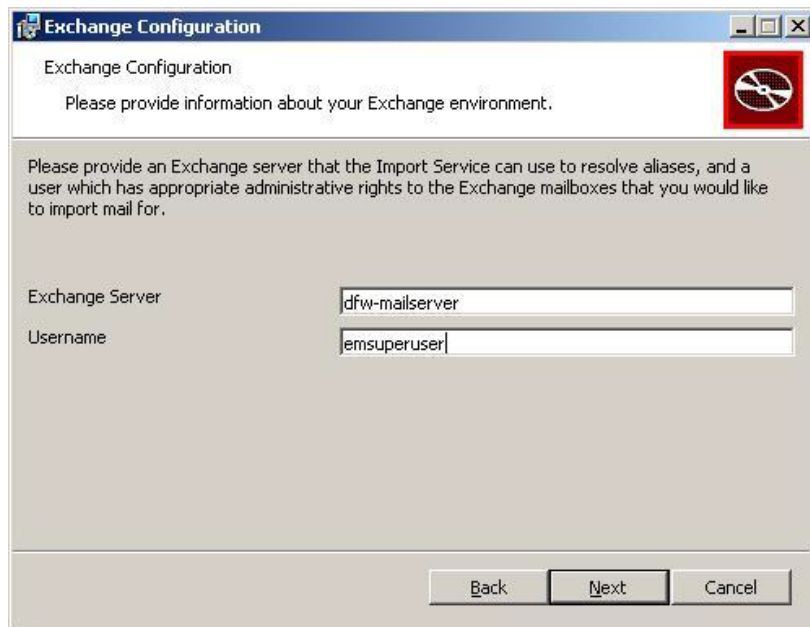


The screenshot shows a dialog box titled "Service Credentials" with a red "X" icon in the top right corner. The text "Service Credentials" and "Please enter the service credentials that the Windows services will run as." is displayed. Below this, there are three input fields: "Domain" containing "EHSANSUPERXCHAN", "Username" containing "emsuperuser", and "Password" which is empty. At the bottom, there are three buttons: "Back", "Next", and "Cancel".

- 10** The **Custom Setup** window prompts you to enter the compression directory location. Accept the default location and respond **Yes** when prompted to create the directory.



- 11** At the **Exchange Configuration** window, enter the username with administrative rights to the information stores from which messages are imported (such as Exchange mailboxes and public folders). This is usually the EAC service account. The installer determines the Exchange DN value to register, and will configure the system to use it.



- 12** At the **Exchange Configuration** window, enter the fully qualified domain name of an Exchange Server that can resolve users for the information stores you want to import messages from.

**NOTE Exchange Server Name Not Validated**

The installer does not validate the name of the Exchange server you provide. If you enter an incorrect value here, the import service will not work.

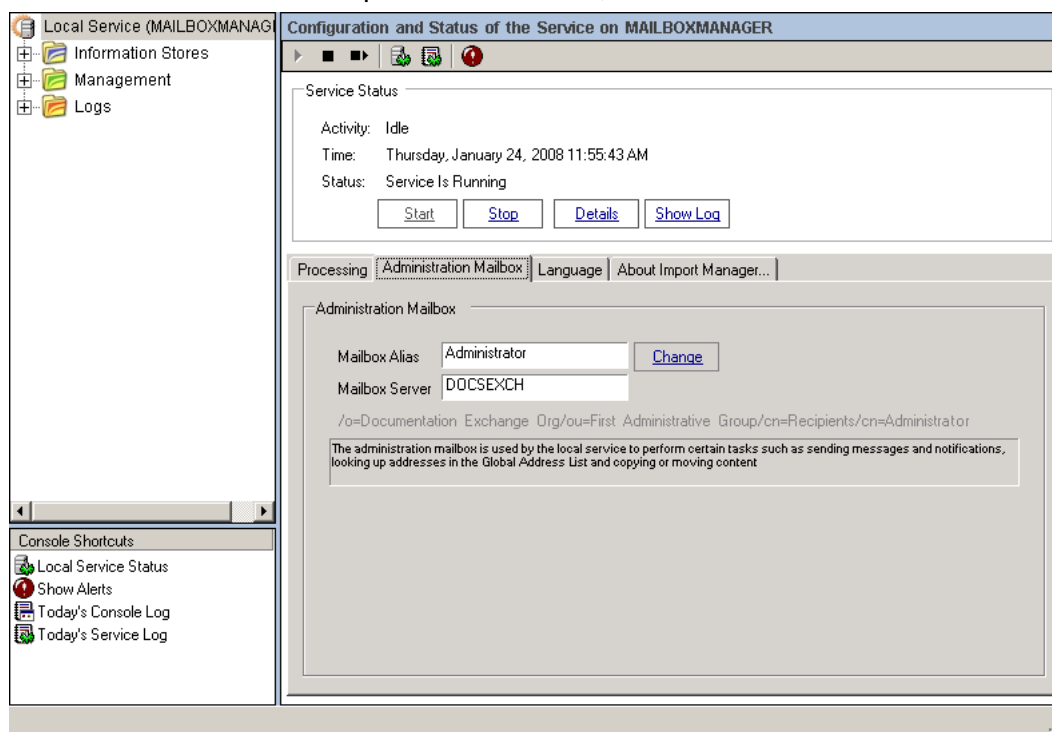
- 13 Click **Next**. The **Start Copying Files** window lists the components to install.
- 14 Click **Next**. The **Setup Status** window displays installation progress.
- 15 Click **Finish**.

## Configuring the Administrator Mailbox

The system requires that you identify an Outlook profile for the Exchange administrator.

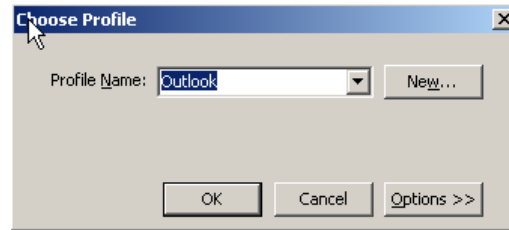
**To configure the Administrator Mailbox:**

- 1 Launch Mailbox Policy Manager. Click **Start > All Programs > MessageLabs > Mailbox Policy Manager**.
- 2 In the lower part of the window, click the **Administration Mailbox** tab.



- 3 If you already have an Outlook profile for the Exchange administrator, click **Change**, browse to the mailbox associated with the profile, and select it.

If you do not already have an Outlook profile for the Exchange administrator, start Outlook and create a profile.



## Deploying the Desktop Agent

If your organization has implemented the Desktop Agent, you can deploy it to your end users' machines. This allows the server to access and act on PSTs located on users' local machines.

### Client Machine Requirements

Client machines running the Desktop Agent must meet the following requirements:

**Operating System**—Windows XP, (x86) or Windows Vista (x86 or x64)

---

**NOTE Vista Users Must Have Administrative Access to the Local Machine**

When the Desktop Agent is installed for a user running Windows Vista, the user whose PSTs are to be managed must have local administrative rights. Otherwise, the Desktop Agent does not have sufficient permissions to complete Mailbox Policy Manager actions.

---

**Outlook Client**—Outlook 98, 2000, XP, or 2003

### Predeployment Tasks

#### Installations

Before you deploy the Desktop Agent, you must have already:

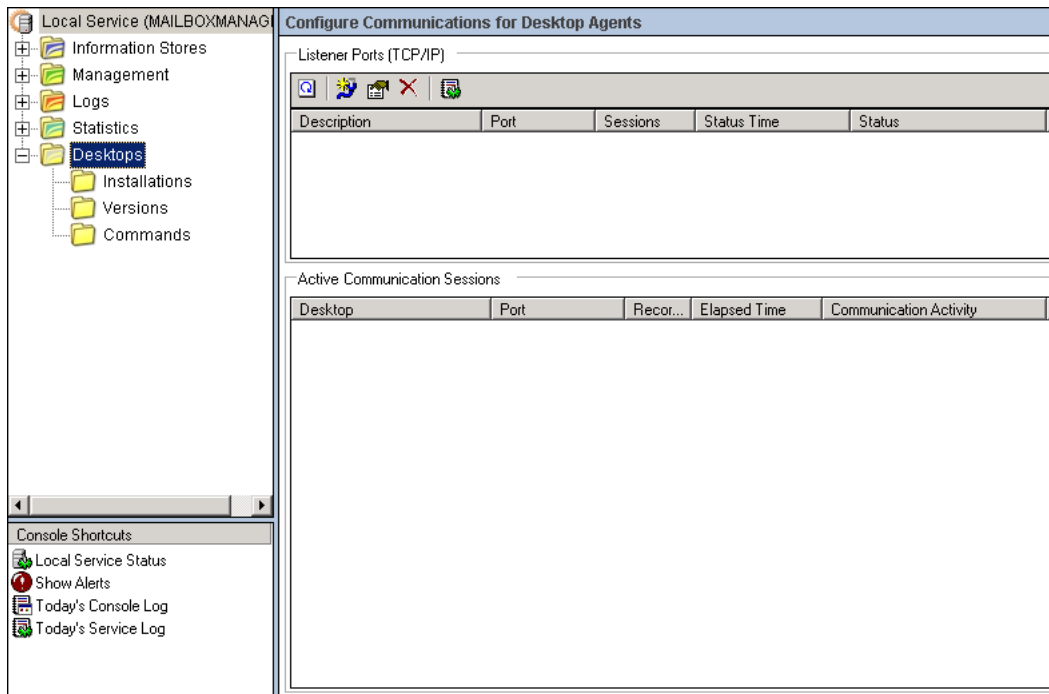
- 1 Installed and configured the EAC service software. Refer to your Administrator documentation for details.
- 2 Installed and configured MessageLabs Hosted Email Archive. Refer to your Administrator documentation for details.
- 3 Performed a successful synchronization with SyncManager.
- 4 Installed and configured the Mailbox Policy Manager server.

## Configure Desktop Agent Listener Port

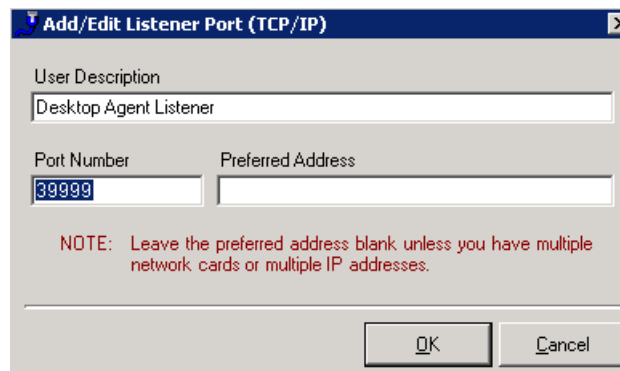
You must set the TCP listener port through which the Desktop Agent will communicate with the Mailbox Policy Manager server.

### To set the listener port for the Desktop Agent:

- 1 Launch Mailbox Policy Manager. Select **Start > All Programs > MessageLabs > Mailbox Policy Manager**.
- 2 Click **Desktops**. The **Configure Communications for Desktop Agents** pane appears.



- 3 Click the **Add New Listener Port**  icon. The **Add/Edit Listener Port (TCP/IP)** dialog box opens.



- 4 Provide the port number. MessageLabs recommends using port 39999, but you can designate any port that is not used by any other application and is not blocked by any firewall or security applications.

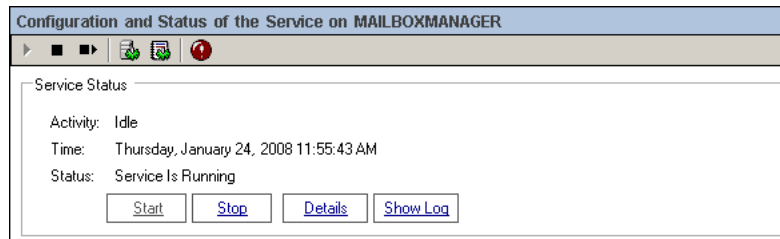
---

**NOTE Use the Same Port Number in the Mailbox Policy Manager Interface and Desktop Agent Setup File**

Whatever TCP listener port you choose, you must provide this same port number in the Mailbox Policy Manager interface and in the masetup.ini file used to configure the Desktop Agent deployment.

---

- 5 Click **OK**.
- 6 Stop and restart the Mailbox Policy Manager service. In the navigation pane, click **Local Service**. The **Configuration and Status of the Service** pane appears.



Stop the service. Wait a few moments, then restart it.

## Configure Desktop Agent Files and Directories

### To configure files and directories for Desktop Agent deployment:

- 1 On the server, create a directory to house the log files generated by the deployment. This directory must also be shared across the network. Any machines on which the Desktop Agent will be deployed must have this directory mapped as a network drive.
- 2 Create shared network directories required for the deployment and give them the required permissions. Ideally use your domain policy to run a script that sets up the permissions, copies the files from the server to a local directory on the target computer, and then (optionally) copies the log files back to the writable shared directory on the file server.
- 3 Modify the **InstallMailboxPolicyManagerDesktopAgent.vbs** file and copy it to the shared deployment file directory you created.
  - a. On the Mailbox Policy Manager server, browse to the installation directory and locate **InstallMailboxPolicyManagerDesktopAgent.vbs**.
  - b. Edit the **logfilelocation** variable, using the mapped network drive value of the shared log file directory you created, for example: `Q:\MailboxpolicyManagerInstall_LOG\`. You must include the closing slash for this value.



- 4 Edit the **masetup.ini** file located in the directory that contains the Mailbox Policy Manager installation files.
  - a. For **MAEAddress**, provide the IP address or fully qualified domain name of the machine hosting Mailbox Policy Manager.
  - b. If you want the Desktop Policy Manager to run as a Local System service, set **ServiceUID** to `LocalSystem` and leave **ServicePWD** blank. If this is not practical, for **ServiceUID** provide a valid domain and user ID for the user who will deploy the Desktop Agent, and provide the password for this user in the **ServicePWD** field. This user must have read and write access to the **HKEY\_LOCAL\_MACHINE\Software** section of the registry on any machine on which the Desktop Agent is to be deployed.
  - c. For **MAEPort**, provide the TCP listener port through which the Desktop Agent will communicate with the Mailbox Policy Manager server. Use the same port number you designated in the Mailbox Policy Manager user interface (refer to ["Configure Desktop Agent Listener Port" on page 12](#)).
  - d. Save and close masetup.ini.

## Deploy the Desktop Agent

### To deploy the Desktop Agent:

Run the following command from the Mailbox Policy Manager installation files directory:

```
cscript InstallMailboxPolicyManagerDesktopAgent.vbs
```

---

**NOTE** **Deploying in Windows Vista**

To deploy the Desktop Agent on Windows Vista, you must launch the command prompt as Administrator.

---

After you have deployed the Desktop Agent, you can refer to the deployment log files and the Mailbox Policy Manager interface to verify the installations. From the Mailbox Policy Manager interface, select **Desktops > Installations** for a list of all installed agents and their status information.



# 3 Mail Import

---

## Introduction

Use the Mailbox Policy Manager to import information stores into the archive, apply importing rules, and automatically search your mail servers for information stores to import. You can also view log files and statistics for information stores.

To open the Mailbox Policy Manager, select **Start > Programs > MessageLabs > Mailbox Policy Manager**.

## Importing Messages to the MessageLabs Hosted Email Archive Data Center

You can import messages from three different types of information stores:

- **Mailboxes**—Mailboxes stored on an Exchange server.
- **Personal Folders**—Mail and related information for a single person stored in a PST file.
- **Public Folders**—Folders for public messages that can be accessed by multiple users.

These information stores must be located in a local directory on the server or a network-accessible directory.

---

**CAUTION** Imported Messages are Immediately Subject to Retention Policies

Prior to importing an information store, make sure that the appropriate length and type of retention policy are set. For example, if the owner is subject to a 90 day retention policy, and some of the messages in the information store are 180 days old, the messages older than 90 days will be imported, then immediately marked eligible for purging from the data center. To help avoid unnecessary storage costs, configure the import `from` and `to` parameters to align with the applicable retention policies. Configure these parameters in the **Conditions** tab of the **New Local Rule** screen.

---

The process of importing messages involves these major steps:

- 1 Define the information store that contains the messages to import. See ["Defining the Information Store" on page 16](#).
- 2 Assign an owner to the information store you are importing. See ["Assigning an Owner to the Information Store" on page 20](#).

- 3 Create rules for selected information stores to be pulled into the archive. See ["Creating Processing Rules" on page 24](#).
- 4 Schedule processing times for importing messages from information stores into the archive. See ["Setting Rule Processing Time" on page 30](#).

You can also use optional features to:

- 1 Set up automatic searching for information stores. See ["Using Automated Searches" on page 32](#).
- 2 Use import files to add information to the archive. See ["Using Input Files to Add Data to the System" on page 35](#).

## Defining the Information Store

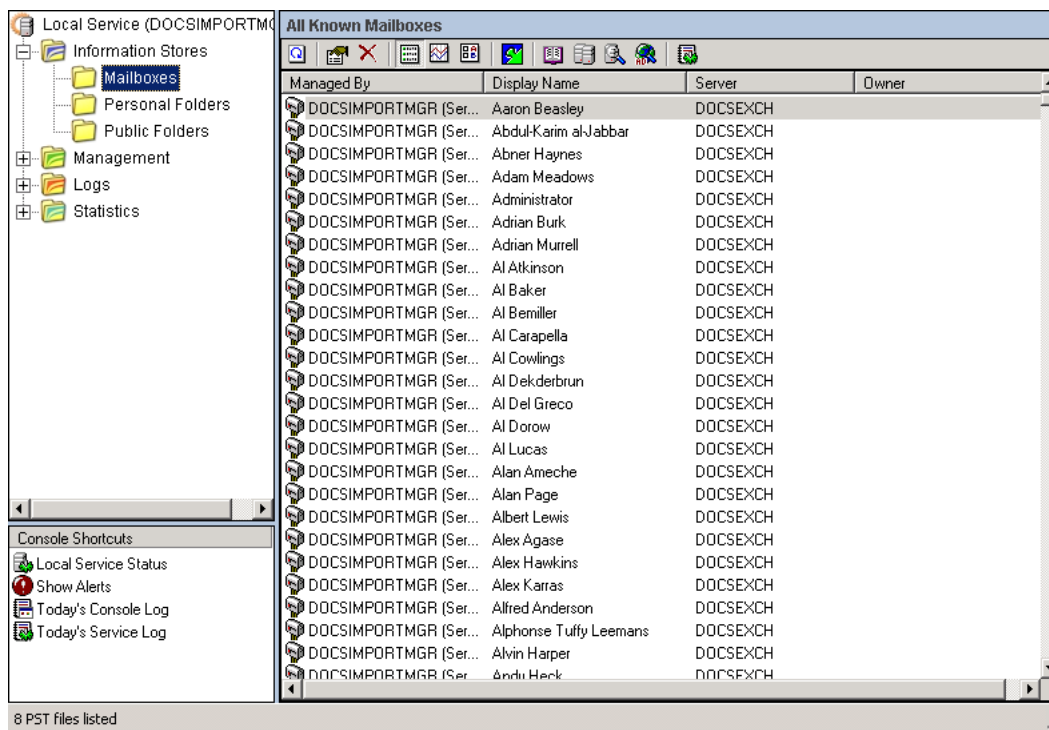
Before you can import messages, you must define the information stores from which messages will be imported.

To define an information store:

- 1 Launch the Mailbox Policy Manager (**Start > Programs > MessageLabs > Mailbox Policy Manager**).
- 2 Expand **Information Stores**.

3 To define **mailboxes** from which to import messages:

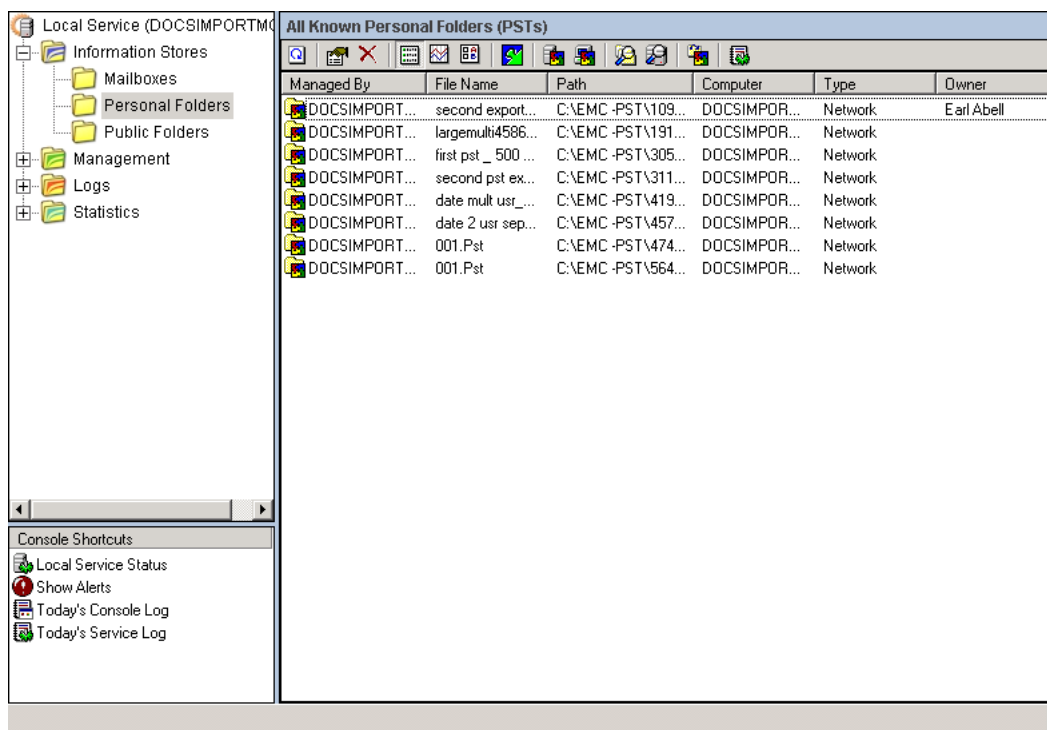
- a. From the list of information stores, click **Mailboxes**. The list of Known Mailboxes appears.



- b. Right-click anywhere in the All Known Mailboxes list and select **Add Mailboxes** from the pop-up menu.

- If you choose to add mailboxes from the Global Address List (GAL), you must select an Outlook profile, then select the mailboxes to add from the address list.
- If you choose to add mailboxes from the Exchange Server, you can browse the network or browse the GAL to select the mailboxes to import.

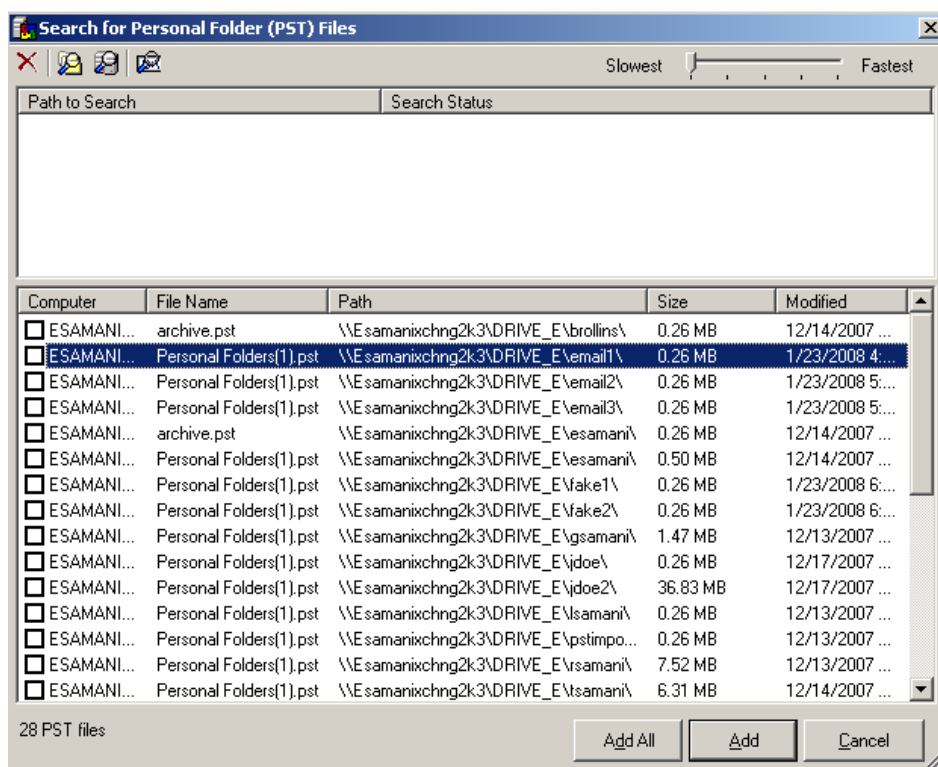
- 4 To define **Personal Folders (PSTs)** from which to import messages:
  - a. From the list of information stores, click **Personal Folders**. The list of Known Personal Folders (PSTs) appears.



- b. Right-click anywhere in the All Known Personal Folders list and select **Add PSTs** from the pop-up menu. You can choose to search for PSTs by browsing the network or by searching servers. You can also add PSTs by using a text file. See ["Using Input Files to Add Data to the System" on page 35](#).

After you choose the search method, the system searches for all PSTs it can find on the network or on the selected servers. All available PSTs

are displayed.

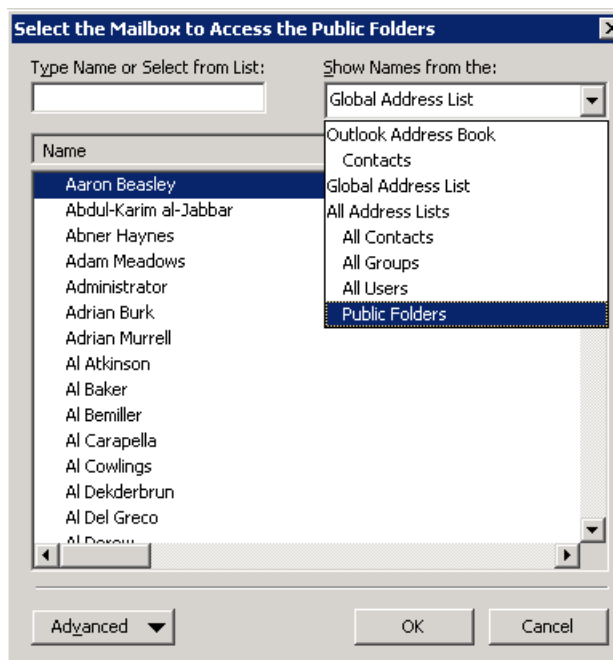


#### NOTE Allocating Processing Threads

The **Slowest/Fastest** slider bar in the upper right corner of the **Search for Personal Folder (PST) Files** screen allocates processing threads to the search. By default, it uses the maximum number of threads (Fastest) to decrease search time. If you want to allocate fewer threads to the search process, move the slider to the left (toward Slowest). This action has no effect on the quality of the results, only the time it takes to render them.

- c. Choose which PSTs to import.
  - To add only selected PSTs, check the box next to each PST, then click **Add**.
  - To add all of the PSTs, click **Add All**.
- 5 To define **Public Folders** from which to import messages:
  - a. From the list of information stores, click **Public Folders**. The list of Known Public Folders appears.
  - b. Right-click anywhere in the All Known Public Folders list and select **Add Public Folders > From the Global Address List** from the pop-up menu.

- c. Select an Outlook profile, then choose **Public Folders** from the **Show Names from the list**.



- d. Select a public folder, then click **OK**.

## Assigning an Owner to the Information Store

After you have defined an information store, you must assign an owner to it. The owner is the user to associate the messages with in the data center. Only one owner can be assigned per information store. The ways you can assign owners varies by information store:

- You can either assign owners for PSTs automatically, or you can assign them manually.
- You can assign ownership of mailboxes manually, or through the automatic search process. (For the latter, see ["Using Automated Searches" on page 32.](#))
- Assign ownership of messages in public folders using the Import Service Status Console. See ["Public Folders" on page 45.](#)

---

### NOTE Retention Policies and Message Owners

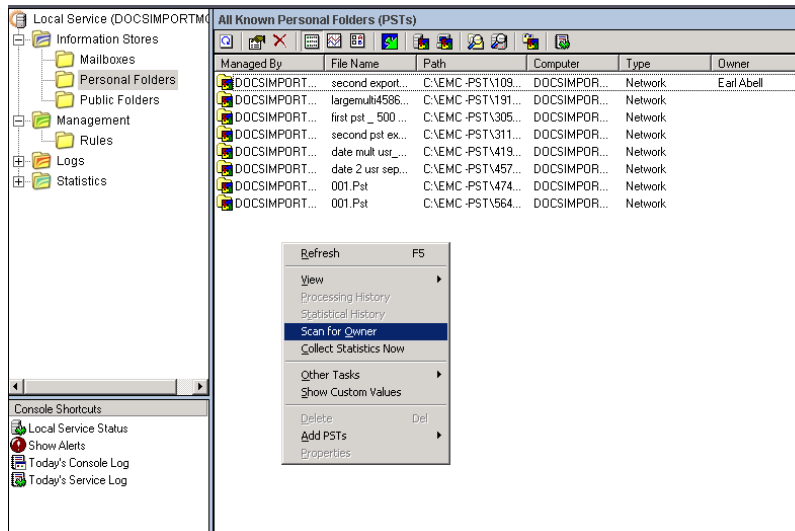
If you're assigning messages from several users to one owner, the system will apply the retention policies set for the owner, not the individual users.

---



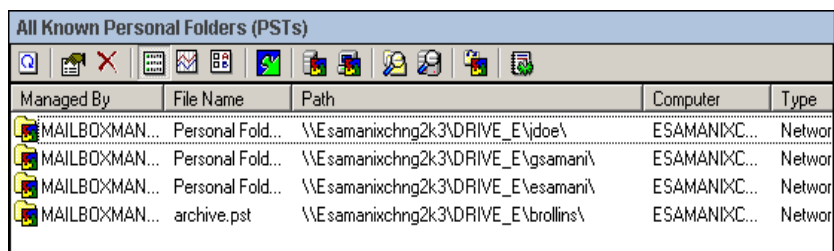
## To automatically assign an owner to a PST:

- 1 Highlight one or more PSTs.
- 2 Right-click the PSTs and select **Scan for Owner**. The system will then automatically determine the owner of the PSTs based on automatic matching criteria. (In cases where the system is unable to assign PST ownership automatically, you must do so manually.)



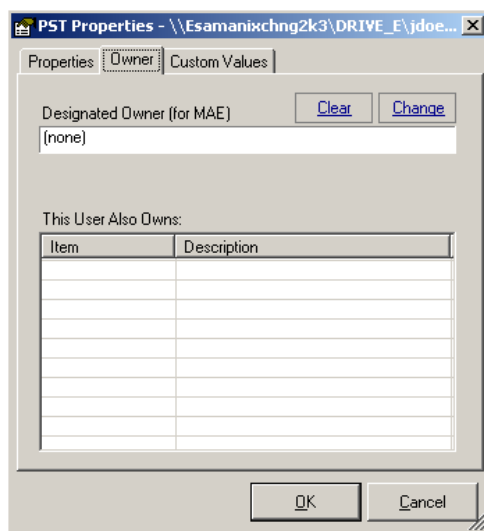
## To manually assign an owner for a mailbox or PST:

- 1 Highlight a single mailbox or PST, right-click it, and select **Properties**.



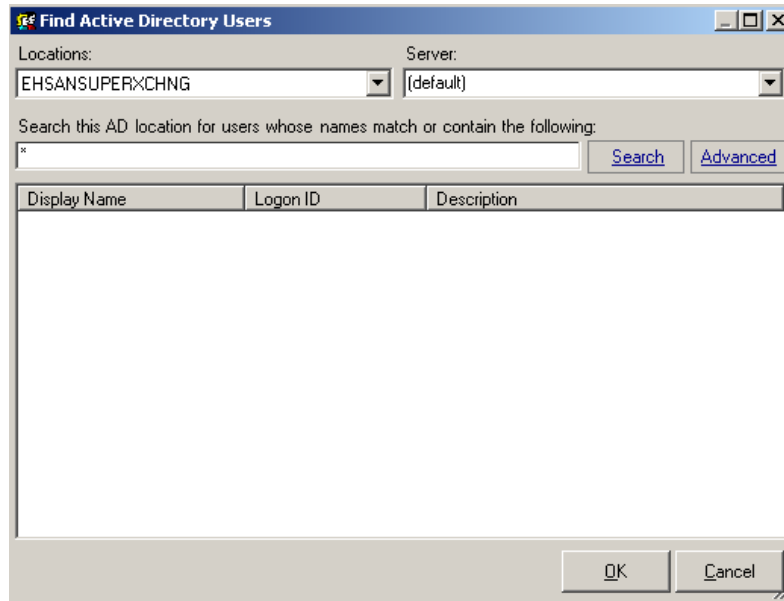
Managed By	File Name	Path	Computer	Type
MAILBOXMAN...	Personal Fold...	\\Esamanixchng2k3\DRIVE_E\jdoe\	ESAMANIXC...	Networ
MAILBOXMAN...	Personal Fold...	\\Esamanixchng2k3\DRIVE_E\gsamani\	ESAMANIXC...	Networ
MAILBOXMAN...	Personal Fold...	\\Esamanixchng2k3\DRIVE_E\esamani\	ESAMANIXC...	Networ
MAILBOXMAN...	archive.pst	\\Esamanixchng2k3\DRIVE_E\brollins\	ESAMANIXC...	Networ

- 2 Select the **Owner** tab.

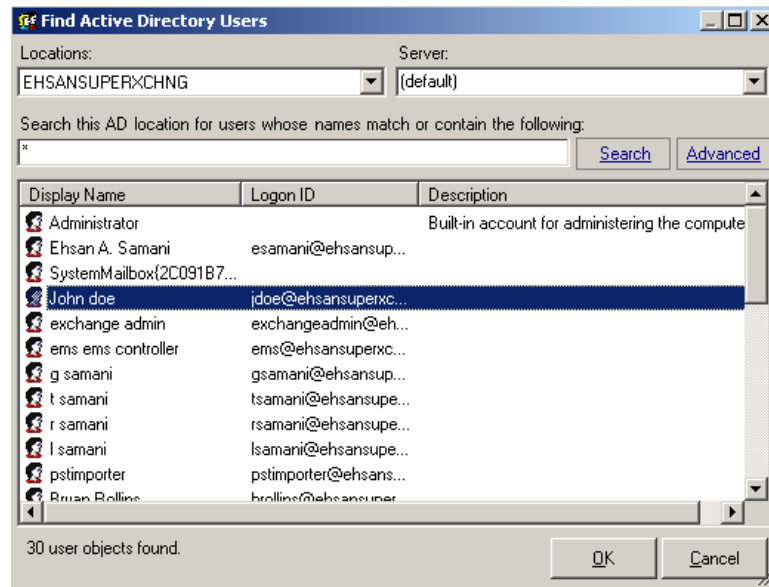


- 3 Click **Change**.
- 4 Assign an owner to the information store. When identifying the owner, you must either enter the **complete, exact** Outlook display name, or use an asterisk (\*) as wildcard, either by itself or at the beginning and end of the display name, for example \*Smith\*. The system associates the mail with

whomever is identified here as the owner; it won't verify that this user is the same person who sent or received the message. Enter the search string and click **Search**.



- 5 Click an owner to select. The assigned owner must have sufficient access privileges to view the information store. Click **OK**.

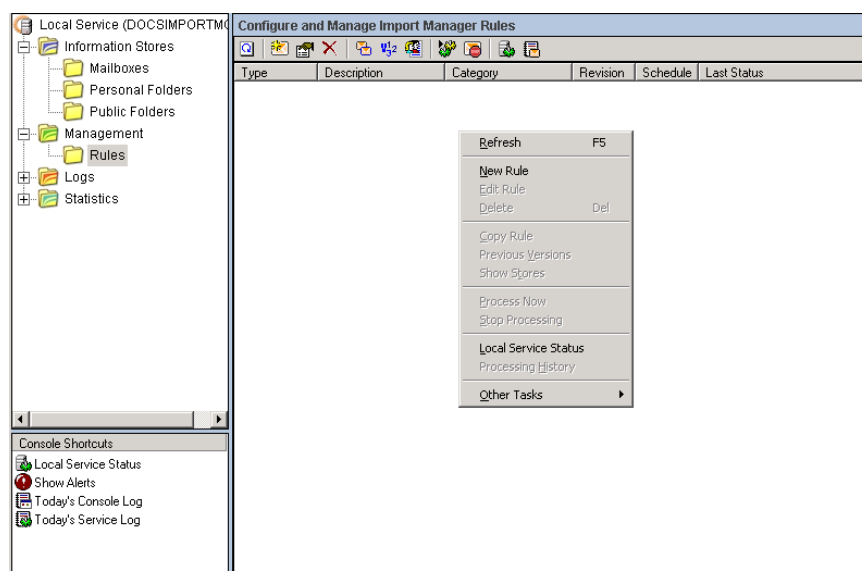


## Creating Processing Rules

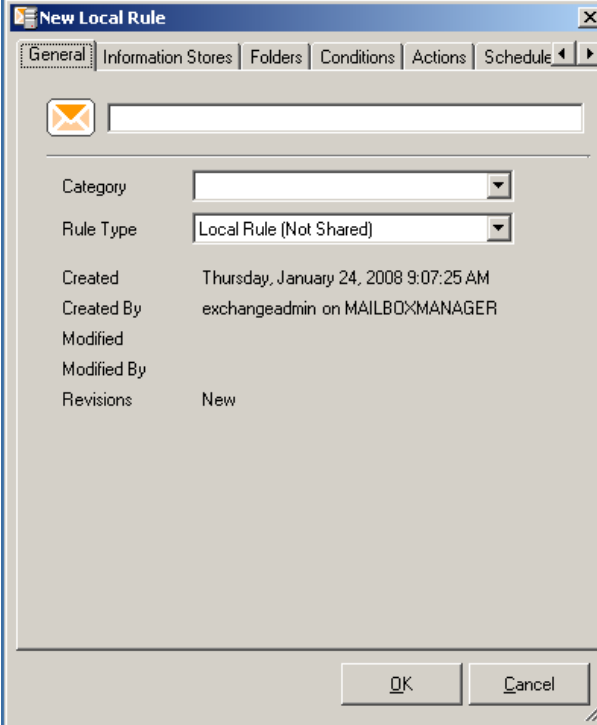
After you have defined an information store and assigned an owner to it, you can define processing rules that determine which messages in an information store will be imported into the archive.

To create a new rule:

- 1 Expand the **Management** folder on the left side of the window, then click the **Rules** folder.
- 2 Right-click the **Configure and Manage Rules** area and select **New Rule**.



- 3 Provide general information about the rule.
  - a. In the **General** tab, enter a name for the rule.

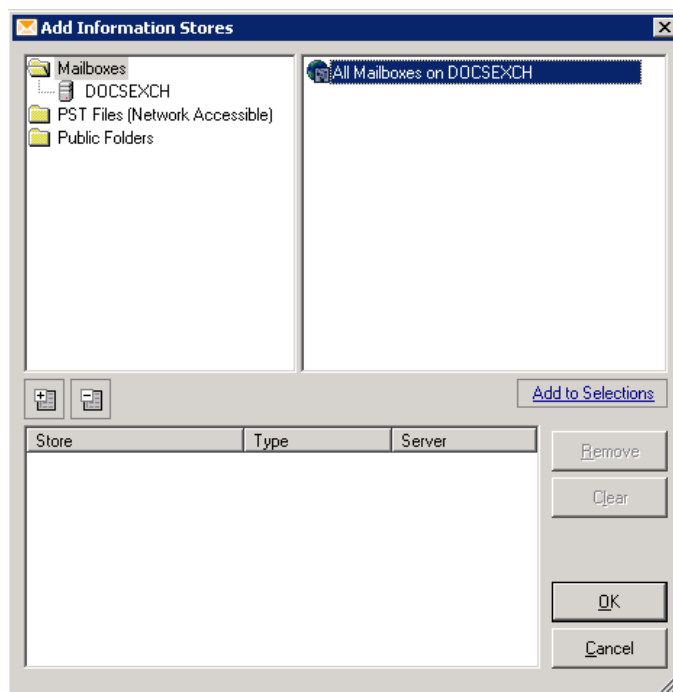


The screenshot shows the 'New Local Rule' dialog box with the following fields and values:

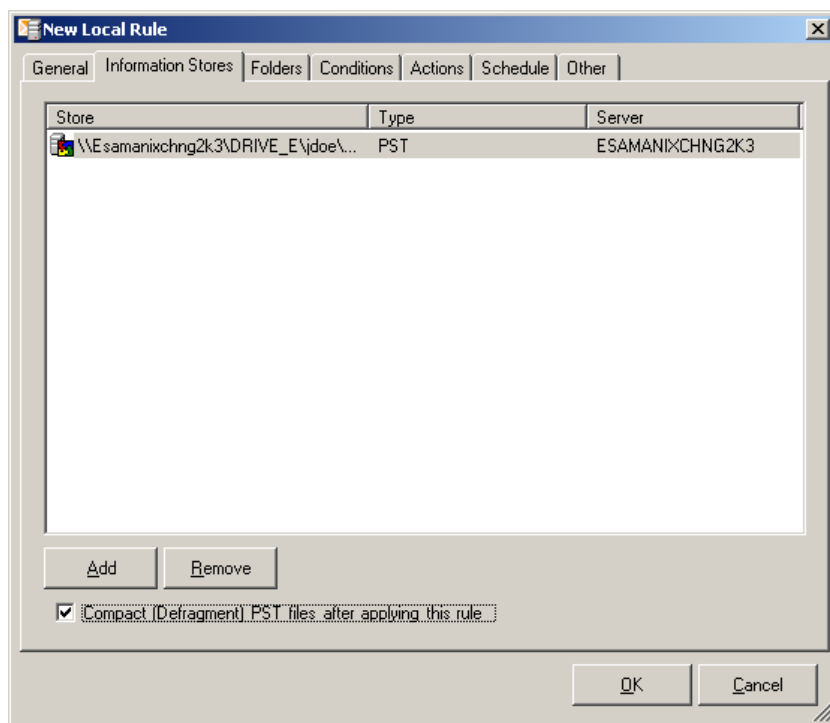
Field	Value
Name	(Empty)
Category	(Dropdown menu)
Rule Type	Local Rule (Not Shared)
Created	Thursday, January 24, 2008 9:07:25 AM
Created By	exchangeadmin on MAILBOXMANAGER
Modified	
Modified By	
Revisions	New

- b. Either leave the **Category** field blank, or enter text describing the type of rule.
- c. In the **Rule Type** field, leave Local Rule (Not Shared) as the default.

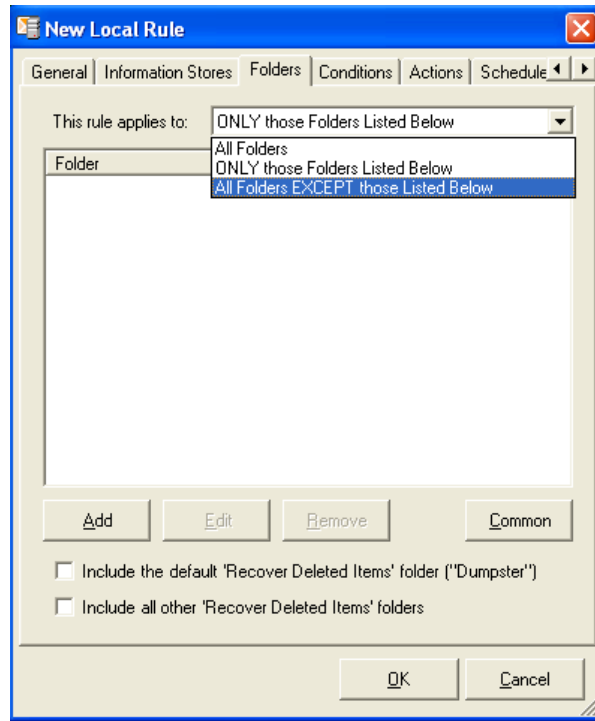
- 4 Determine the information stores to which this rule applies:
  - a. Click the **Information Stores** tab, click **Add**, and choose either all stores identified, or select individual stores from the list. Click **OK**.



- b. If you want to compact PSTs (reclaim free space), check **Compact (Defragment) PST files after applying this rule**. Click **OK**.



- 5 Set the **folders** to which this rule applies. Click the **Folders** tab. Select the folders and folder types to include.



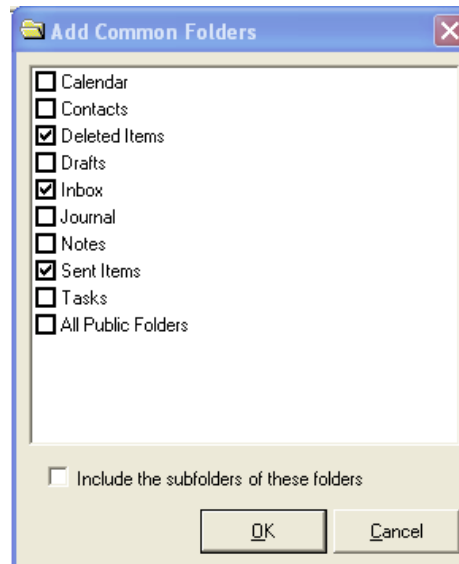
---

**NOTE Importing Drafts**

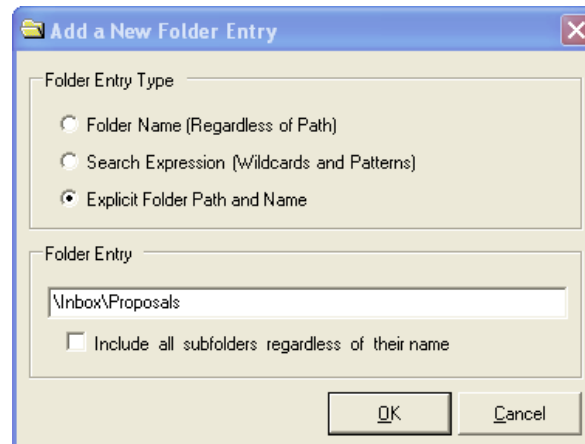
By default, draft messages are imported. If you do not want to import draft messages, exclude the Drafts folder. Because draft messages do not have a sent date, the message modification date is used to identify the message date.

---

- If you want to identify only certain types of folders to include, click **Common**, and check the check boxes next to the folder types you want. If you want to include the subfolders, check **Include the subfolders of these folders**, then click **OK**.

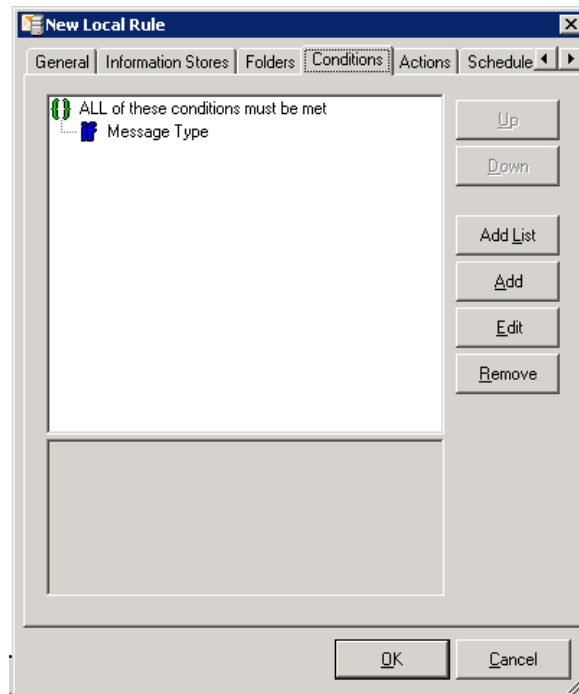


- If you have created custom folders you want to include, click **Add**, click **Explicit Folder Path and Name**, and enter the path in the **Folder Entry** field. If you also want to include the subfolders, check **Include all subfolders regardless of their name**. Click **OK**.

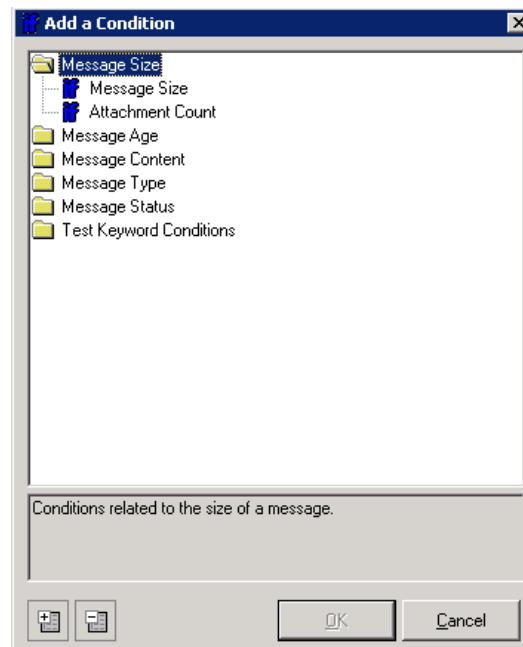




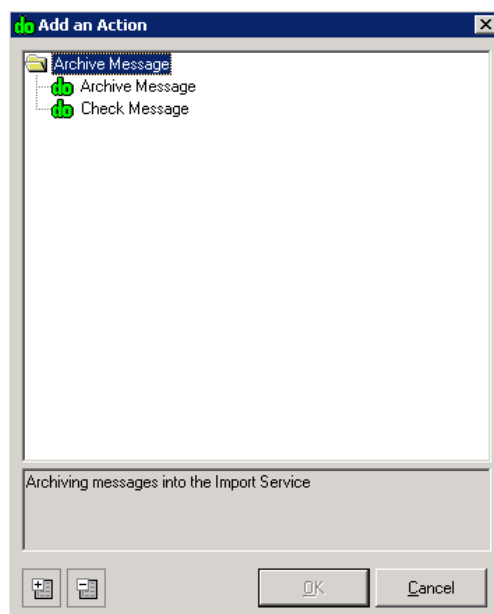
- 6 Define the **conditions** to apply to the rule. Click the **Conditions** tab.



- 7 Leave the **Message Type** set as the default, so that only items of the Outlook class type *Message* are imported.
- 8 If you want to set other conditions on imported messages, such as size or message age, click **Edit**. Click **Add List** to bring up **Add a Condition**. Use the **Add a Condition** screen to add more detailed logical operators for more complex import rules.



- 9 Specify **actions** the rule can take against messages it finds through the rule. From the **Actions** tab:
  - a. Click **Add** and select **Archive Message** to import all messages.
  - b. Select **Check Message** if you want the system to check whether these messages have already been archived. Use this option if you have already imported some (but not all) messages into the archive. You can then archive all messages in those information stores that have not already been archived using the **Import Missing Messages** right-click menu option in the **Active Imports** pane of the Import Service Status Console. See ["Active Imports" on page 45](#).
- 10 A dialog appears prompting you for an import path; the path must be the same as the one you selected as the install path.



- 11 Click **OK**.

## Setting Rule Processing Time

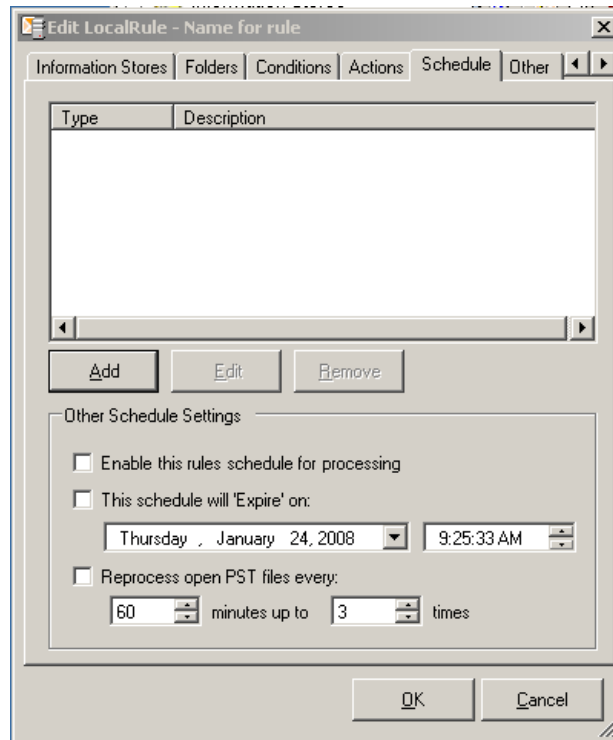
After you have created a rule for an information store, you must set the time to begin processing data.

**To start processing information stores in this rule immediately:**

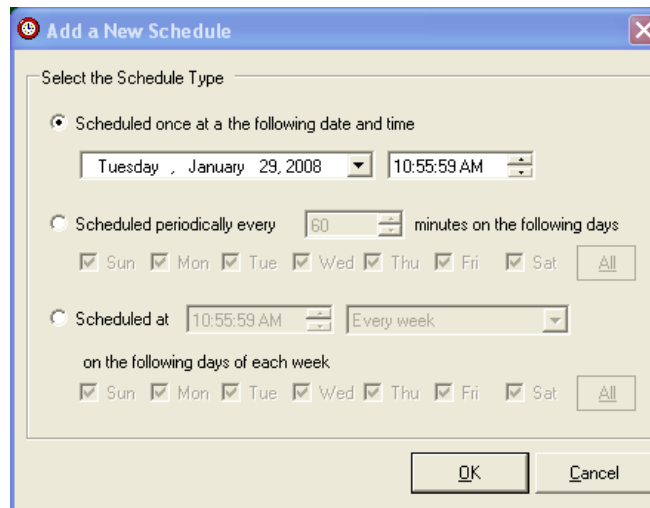
- 1 Select the rule you want to start processing.
- 2 Right-click the rule and select **Process Now**.

## To set a schedule for rules:

- 1 Click the **Schedule** tab.



- 2 Click **Add**.
- 3 Define a schedule one of three ways using the dialog boxes:



- Schedule the rule to run once on a specified day at a specified time.
- Schedule the rule to run every X minutes on specified days.
- Schedule the rule to run at a particular time on specified days every one to five weeks.

- 4 Click **OK**.

- 5 Check **Enable this rule's schedule for processing**.
- 6 Click **OK**.
- 7 Click **OK**. Processing begins as configured.

---

**CAUTION Do Not Delete Information Store Files Until Import to the Data Center Has Completed**


Use the Status Console to monitor import status. Deleting the information store files prematurely can prevent messages from being imported.

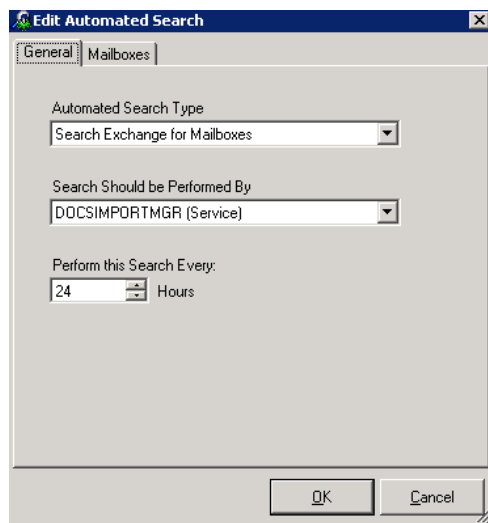
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## Using Automated Searches

Automated searches allow you to automatically search for information stores to archive.

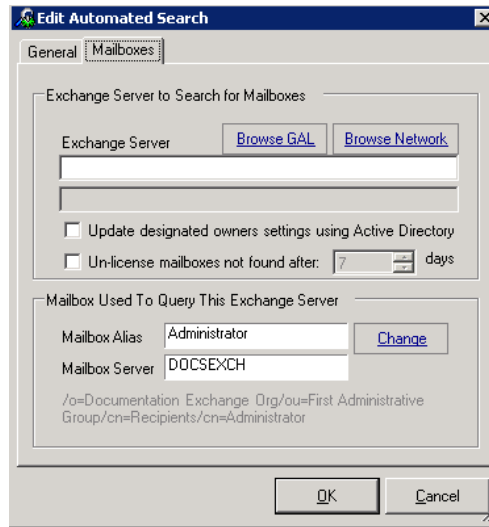
### To create an automated search:

- 1 From the navigation list on the left side of the screen, click **Information Stores**.
- 2 Click **Add a new Automated Search**. 
- 3 From the **General** tab of the **Edit Automated Search** window, choose the following parameters:



- **Automated Search Type**—Choose Search Exchange for Mailboxes, Search Active Directory for Mailboxes, or Search for PST files.
- **Search Should be Performed By**—Do not change this from the default setting.
- **Perform this Search Every**—Enter the number of hours between automated searches. The default is 24.

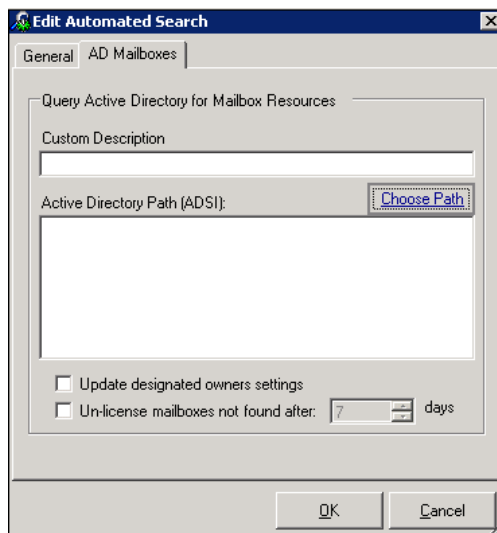
- 4 To search Exchange for Mailboxes:
  - a. Click the **Mailboxes** tab.



- b. Enter the name of the Exchange server you want to automatically search. You can also browse the GAL (Global Address List) or the Network for mailboxes using those hyperlinks.
    - c. Check **Update designated owner settings using Active Directory** if you want the system to automatically assign the same owner for the mailbox that is listed in Active Directory.
    - d. Check **Un-license mailboxes not found after X days** if you are in danger of exceeding your number of licensed mailboxes.
    - e. The **Mailbox Alias** and **Mailbox Server** fields are taken from your system defaults, and should not be changed unless the systems themselves change.

5 To search Active Directory for mailboxes:

- a. Click the **AD Mailboxes** tab.



- b. Enter a name for the search in the **Custom Description** field.

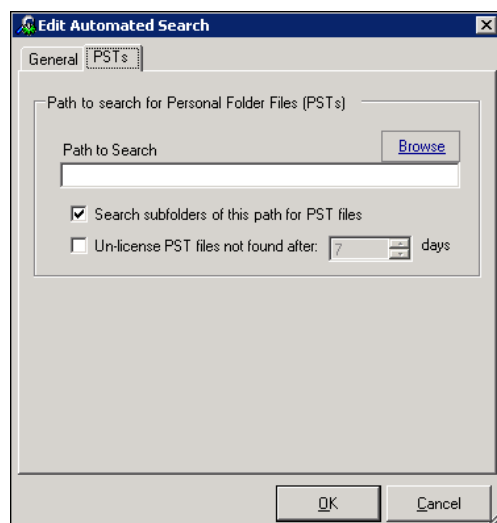
- c. Enter the Active Directory path to the mailbox, or click **Choose Path** to choose the mailbox.

- d. Check **Update designated owner settings** if you want the system to automatically assign the same owner for the mailbox that is listed in Active Directory.

- e. Check **Un-license mailboxes not found after X days** if you are in danger of exceeding your number of licensed mailboxes.

6 To search for PSTs:

- a. Click the **PSTs** tab.



- b. Enter the path to search for PSTs, or else click **Browse** to locate them.

- c. Check **Search subfolders of this path for PST files** if you want to search subfolders.
  - d. Check **Un-license mailboxes not found after X days** if you are in danger of exceeding your number of licensed mailboxes.
- 7 Click **OK** to create the automated search. The search appears in the list of automated searches, where you can edit or delete it.

## Using Input Files to Add Data to the System

If you need to import messages from a large number of PST files, you can upload a list of PST files, then assign owners to each file using an owner template.

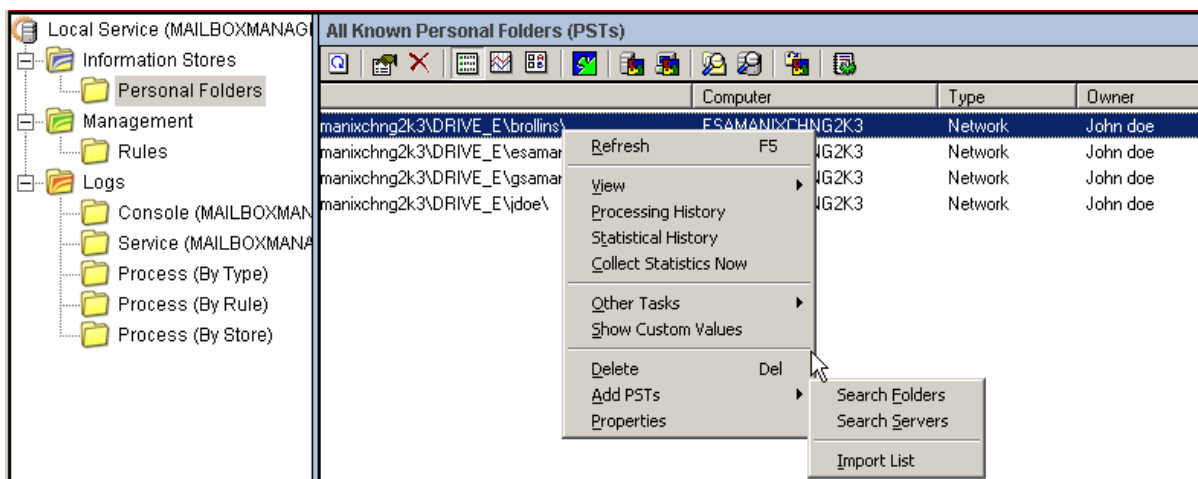
A sample text file containing a list of PST files is shown below. The list requires no header, includes one PST per line, and each line provides the full path to the PST.

### Example 3-1 Sample PST text file

```
\\Esamanixchng2k3\DRIVE_E\user2007\Personal Folders(1).pst
\\Esamanixchng2k3\DRIVE_E\user2008\Personal Folders(1).pst
```

### To use text files for importing PST files:

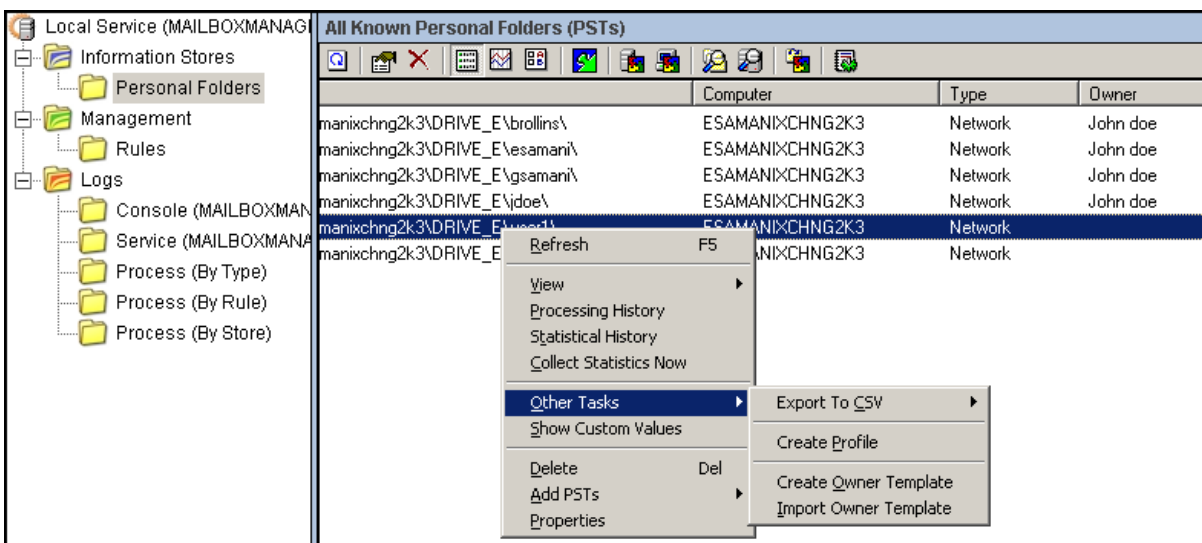
- 1 Create a text file listing the pst files to import, as shown in [Example 3-1](#).
- 2 Import the text file. In the Personal Folders area, right-click the folder and select **Add PSTs > Import list**, then browse to the file you created. The files appear in the list of all known personal folders.



### TIP Owner Template

Manually adding an owner to one of the PSTs provides the format of the owner template contents.

- Right-click a store, select **Other Tasks > Create Owner Template**, and assign a name to it.



- Using a text editor, edit the owner template. Add three columns, one each for the items described in [Table 3-1](#), and fill in the data for each.
- In the **Information Stores > Personal Folders** area, select **Other Tasks > Import Owner Template**. The system matches the contents of the Store GUID with the owner identified in the owner template file.

**NOTE No Data Matching with Active Directory**

The system does not verify that the owner data you provided in the owner template is present in Active Directory.

- Transfer messages in the PSTs as described in ["Importing Messages to the MessageLabs Hosted Email Archive Data Center" on page 15](#).

[Table 3-1](#) describes the data you must add to the owner template file.

**Table 3-1 Data to Add to Owner Template file**

Entry	Definition	Example
Owner Name	[First Name] [Last Name] of the owner	Bob Smith
Owner Distinguished Name	LegacyDN value of the owner	CN=bsmith,CN=Users,DC=ehsansuperxchng,DC=local
Owner Location	Netbios name of the domain from which the users are retrieved	EhsanSuperXchng




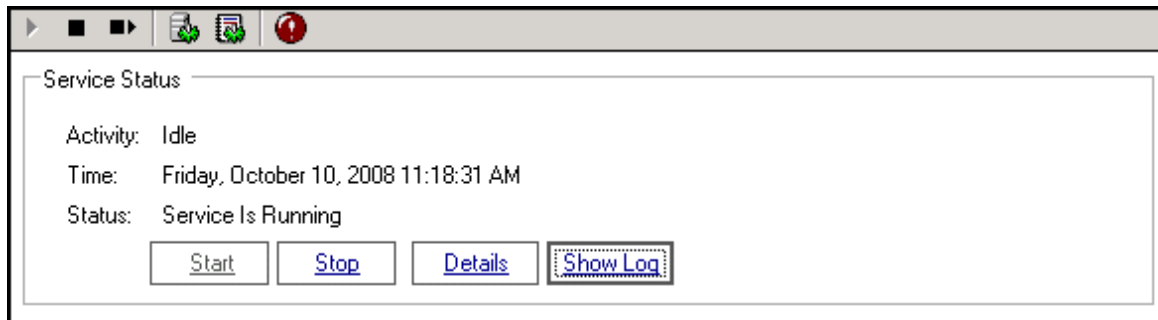
## Log Files

The system keeps various logs of import information to aid in troubleshooting, including:

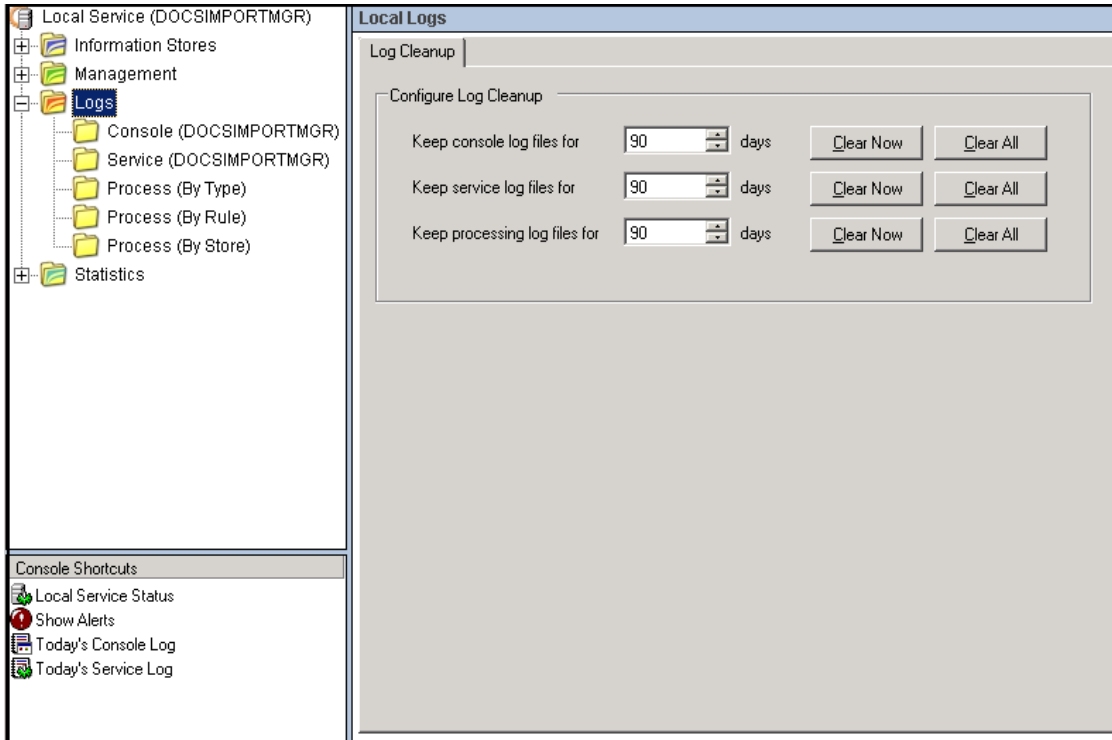
- General log file of daily activity
- Console logs
- Service logs
- Process logs, sorted by type, by rule, and by information store

### To view the daily log file:

- 1 Click the top layer of the navigation list.
- 2 Click either the **Show today's log file for the local service** icon at the top right , or **Show Log**.



The system also keeps individual logs for all import functions. View these logs by expanding the **Logs** navigation list on the left side of the screen.



Click the **Refresh the list of logs** icon  at the top left of the section to refresh the log list. Click the **Open the selected logs** icon  to view individual log files.

#### To view console logs:

- 1 Click **Logs** in the navigation list.
- 2 Click **Console**.
- 3 Double-click the log file you want to view.

#### To view service logs:




- 1 Click **Logs** in the navigation list.
- 2 Click **Service**.
- 3 Double-click the log file you want to view.

#### To view process logs:











- 1 Click **Logs** in the navigation list.
- 2 Click the type of process log you want to view. Choices are:
  - **Process (By Type)**
  - **Process (By Rule)**
  - **Process (By Store)**

### 3 Double-click the log file you want to view.

Filter these processing logs using the icons at the top of the section.

Filter By: Type <ALL> Processed From <ALL> Category <ALL>				
Description	Computer	Processed From	Time	Status
 Auto-Search: (mb list)		DOCSIMPORTMG...	10/6/2008 2:19:1...	Completed successfully
 Collect Statistics from C:\EMC -PST\1090...	DOCSIMPORTMGR	DOCSIMPORTMG...	10/3/2008 4:35:0...	Completed successfully
 Collect Statistics from C:\EMC -PST\1090...	DOCSIMPORTMGR	DOCSIMPORTMG...	10/3/2008 4:19:4...	Completed successfully

From left to right after the **Open the selected logs** icon, the filter icons are:

- Show or Hide currently processing tasks 
- Show or Hide successful tasks 
- Show or Hide tasks that succeed but had errors 
- Show or Hide tasks that failed 
- Only show processing tasks for the last day 
- Only show processing tasks for the last 7 days 
- Only show processing tasks for the last 31 days 
- Show all processing tasks regardless of age 
- Find any warning entries in the preview window 
- Find any error entries in the preview window 

You can also filter process logs using the following filters found just under those icons:

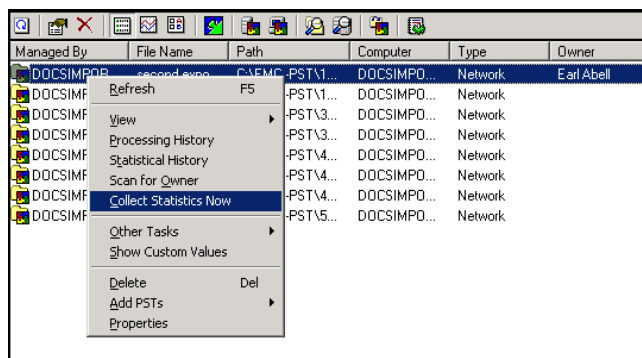
- **Filter by Type**—Choices include Mailboxes or PSTs.
- **Filter by Processed From**—Select the system from which the files were processed.
- **Filter by Category**—Filter logs by category.

## Statistics

You can view statistics on various aspects of information stores.

### To provide statistics:

- 1 Go to **Information Stores** in the navigation list.
- 2 Right-click the mailbox or folder you want information on and select **Collect Statistics Now**.





---

### NOTE Delay in Statistics Processing Time

It may take a few minutes for the system to finish compiling statistics.

---

- 3 The types of statistics are:
  - Mailboxes
  - Personal Folders
  - Public Folders
  - Messages
  - Attachments
- 4 Click the type of statistics you want to view. To include any statistics collection tasks that just finished, click the **Refresh the store statistics list** icon. 

View additional information on information stores being processed from the **Active Imports** pane of the Import Service Status Console. See ["Active Imports" on page 45](#).

View additional information on information stores that have already been processed from the **Import History** pane of the Import Service Status Console. See ["Import History" on page 49](#).

# 4 Status Console

---

## Introduction

Set parameters for importing mail into your archive in the Import Service Status Console. To open the Status Console, select **Start > Programs > MessageLabs > Import Console**. The four major areas of the status console correspond to the four directories on the left side of the console:

- Import Service
- Active Imports
- Import Jobs
- Import History

## Import Service

Import Service provides access to basic import function parameters. There are four function buttons at the top of the section:

- **Start**—Starts the import service. (Depending on how you have set scheduling for import, the system may not start importing immediately after you have clicked this button.)
- **Stop**—Stops the import service.
- **Service Log**—Brings up a global log overview of all import activity for that day. Errors appear in red. Warnings or important items appear in bold.
- **Setup**—Brings up a window with parameters for interfacing with the data center. *Do not alter them unless the data center system has changed.*

There are five tabs for Import Service:

- General
- Active Hours
- Database
- Public Folder
- Ownership (only used by Support)

Note that for all Import Service tab parameters except **Active Hours**, you must restart the Status Console for them to take effect.

### To have Status Console parameters changes take effect:

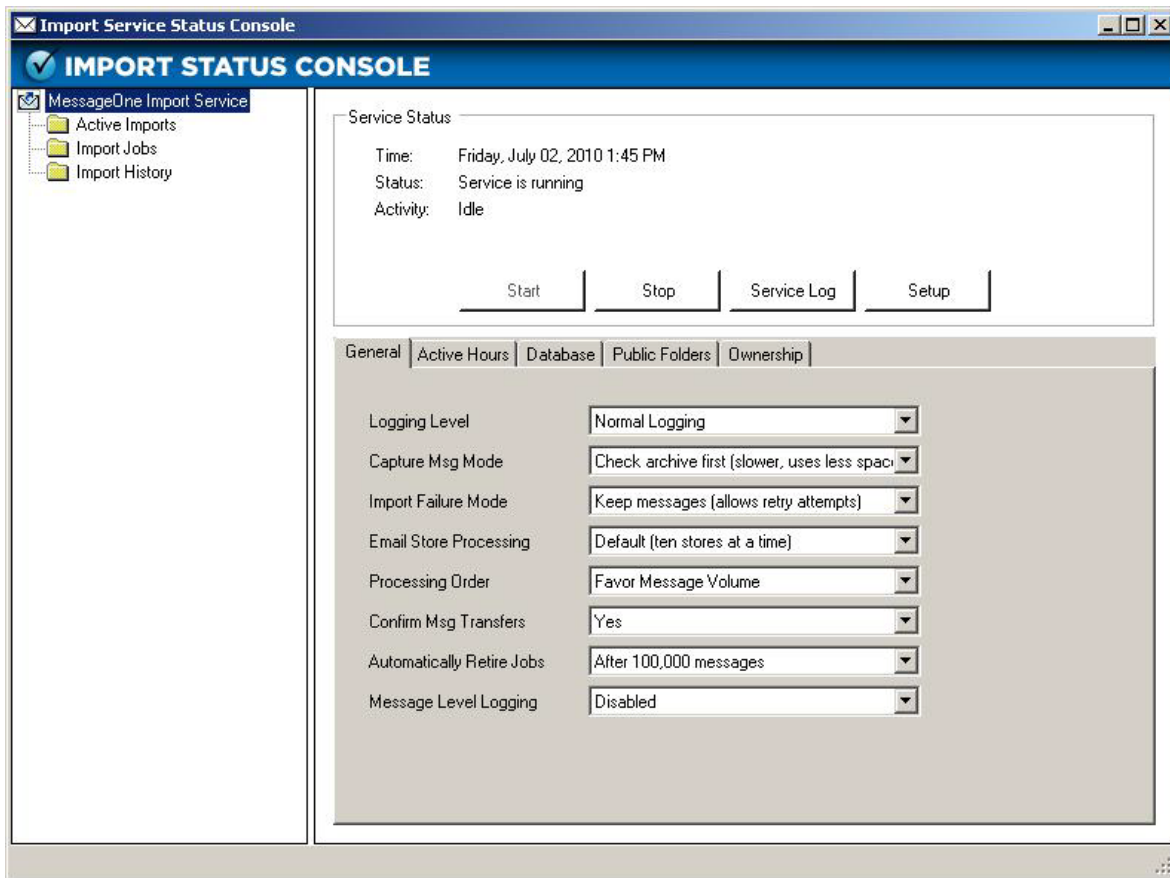
- 1 Quit and restart the Status Console.
- 2 Click **Stop** to stop the import service.
- 3 Click **Start** to restart the import service with the new parameters.

## General

The General tab lets you set general options for import services.

### To set general options:

- 1 Click **Import Service**.



- 2 In the default **General** tab, set the following parameters:

- **Logging Level**—Choices (in increasing order of disk space used) are: Normal, Verbose, Debug. Unless you are trying to diagnose a problem, leave this setting at Normal.
- **Capture Message Mode**—Choices are: Check Archive First (slower, uses less space) or Always Capture (faster, uses more space). Set this based on your system workload and resources.

- **Import Failure Mode**—Choices are: Keep Messages (allow retry attempts) and Log failure details and continue. If you select Keep Messages (allow retry attempts), then you may try to reimport messages that have failed by using that right-click menu option under Active Imports. See "[Active Imports](#)" on page 45.
- **Email Store Processing**—Choices are: Minimal (one store at a time), Low, Default (ten stores at a time), High, and Maximum (twenty stores at a time). Set this based on your system workload and resources.
- **Processing Order**—Choices are Favor Message Progress to process messages in smaller batches, or Favor Message Volume to process messages in larger batches. Favor Message Progress is slightly less efficient, but provides more immediate feedback on progress made.
- **Confirm Message Transfer**—Defaults to Yes. Indicates whether to confirm a message transfer to the data center before querying the data center about the status of the message.
- **Automatically Retire Jobs**—Set importer to automatically retire after x messages have been processed.
- **Message Level Logging**—If enabled (*not* recommended), logs details about each message transmitted. Only enable this option if asked to do so by Support.

## Active Hours

The Active Hours tab allows you to schedule imports.

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**NOTE Scheduling Transfer to the Data Center**

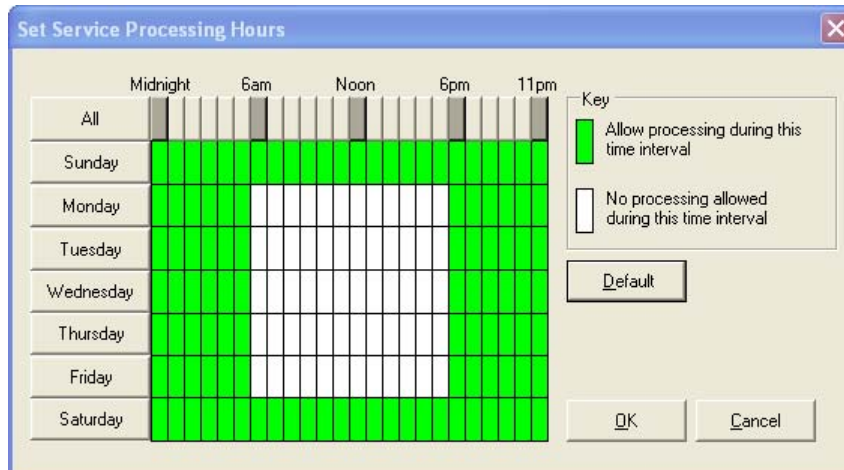
By default, the system only transfers messages to the data center during non-peak hours; that is, transfers do not occur between 6 AM and 6 PM Monday through Friday (local time for the machine). You can configure the system to allow or disallow data transfer during certain times of the day. See "[To set parameters on transfer to the data center:](#)" on page 43. Note that changing these settings requires restarting the Import Service.

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**To set parameters on transfer to the data center:**

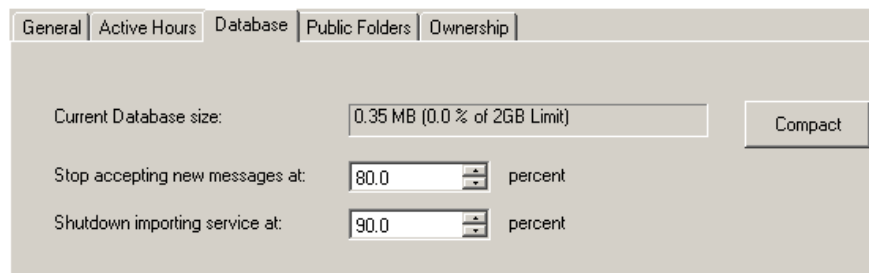
- 1 Click **Import Services**.
- 2 Click the **Active Hours** tab.
- 3 Click **Change**.

- Using the scheduler, select intervals for data processing and click **OK**. Changes become effective at the next start of the Import Service.



## Database

The **Database** tab allows you to set size parameters for the importing database. The system uses an internal database with a maximum capacity of 2-GB to preprocess messages before they are archived in the data center. If you have a large number of messages to process, it is possible to fill up the database, halting import processing. Adjust database settings in the **Database Tab** to prevent this from happening.



### To adjust database settings:

- The read-only **Current database size** field shows the amount of information currently in the database. If it is getting too close to the 2-GB limit, click **Compact** to defragment database records, which will reclaim free space.
- Adjust the **Stop accepting new messages at X percent** setting to raise or lower the percentage of available space before the database stops accepting new messages to process.
- Adjust the **Shutdown importing service at X percent** setting to raise or lower the percentage of available space before the system shuts down all local importing operations.



## Public Folders

The Public Folders tab allows you to assign an owner for all public folders imported. Click **Clear** to remove the previous owner and **Change** to select an owner.

## Active Imports

Active Imports allows you to view status details on current imports. This is the default function upon opening the Status Console.

### To view status of data processing:

- 1 Click **Active Imports**. A list of information stores appears. This list is compiled after the system exports metadata to the Import Service. For each store, columns of information are shown for Email Store (the name of the store), the Store Type, the Total Count of messages, the progress made for each store, the number of messages that have completed (successfully archived), the number of messages that failed to archive properly, and the status.

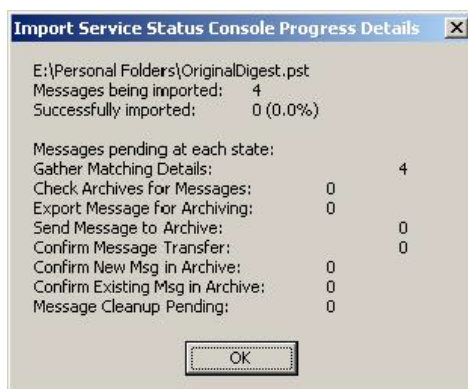
**Table 4-1 Import Console Status**

Entry	Description
Archive Action status	
Collect Message Constraints	Shows number of messages for which message matching constraints have not been collected. To collect these constraints, the import service opens the mail store, retrieves the message, collects the necessary details to perform the message matching, and stores those details.
Match Messages Via Web Service	Shows number of messages for which the constraint details have been collected. These constraints determine whether the message is already in the archive or must be imported. If a message must be imported, it is tagged for export; otherwise it is tagged for message cleanup.
Export Message	Shows number of messages to be imported into the archive.
Send Message to Archive	Shows number of messages being compressed and transferred.
Confirm Message Transfer	Shows number of messages are pending confirmation of successful transfer to the data center.
Confirm New Message in Archive	Shows number of messages were sent to the data center and are waiting for their status confirmation.
Confirm Existing Message in Archive	Shows number of messages were not sent to the data center, but which the data center had marked as pending (waiting for successful import from some other source).

Table 4-1 Import Console Status

Entry	Description
Message Cleanup	<p>Messages tagged for cleanup that have either been successfully imported into the archives or were already there. The import service will perform the desired cleanup on the original message. To perform the cleanup actions, the import service must open the email store and locate the original message.</p> <p>Cleanup options are:</p> <ul style="list-style-type: none"> <li>• <b>Mark Message</b>—The message will be tagged with custom properties which can be used at a later date to identify message which have been imported.</li> <li>• <b>Delete Message</b>—The original message will be deleted.</li> <li>• <b>None</b>—No cleanup action is performed on the original message.</li> </ul>
Successful Import	Messages that have completed all stages successfully and now reside in the archives.
Import Failed	Messages that have failed one of the steps above more than the allowed number of times. To attempt to import these messages again, they must be added to a CSV file again.
Wait for Retry	If the Import Failure Mode is set to Keep Messages, any message normally tagged with Import Failed are tagged with this state. The message must not have failed for critical reason. For example an unsupported message class will fail a message and it will not be set to this state. If the service sees one or more messages in this state, it will not perform its normal message import cleanup processing. Instead it will wait for the user to initiate a retry request.
CheckMessage Action status	
Collect Message Constraints	Details for message matching are collected and used to determine the presence of the message in the archives.
Match Messages Via Web Service	Once collected, the constraints will be sent via a service that only detects the presents of a message in the archives. If a message is present, it is tagged with <code>import successful</code> ; otherwise, it is tagged with <code>message not found</code> .
Message Not Found	When the service sees messages in this state, it waits for the user to request an <code>Import Missing Messages</code> , at which point the message is tagged to <code>Collect Message Constraints</code> for importing.
Import Successful	Message was successfully imported.

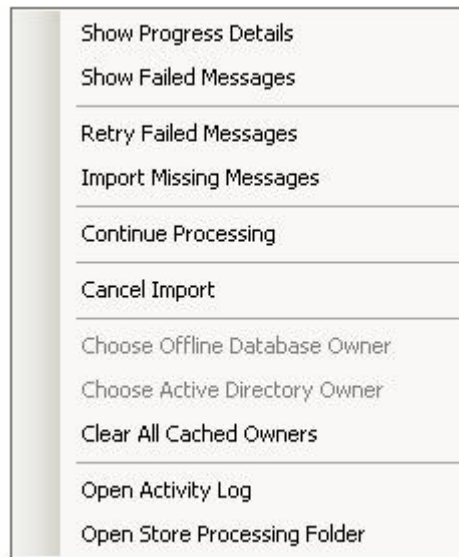
2 Double-click an information store to display processing details.



**Table 4-2 Import Service Status Console Processing Details**

Entry	Description
Total Messages	The number of messages meeting the rule criteria.
Completed	The number of messages transferred to the archive.
Messages pending at each state	
Gather Matching Constraints	Number of messages for which attributes have been gathered and placed in a temporary XML file.
Check Matching Constraints	Number of messages that have been checked against the archive records to ensure the message requires importing; that is, the message is not already present in the archive.
Export Message for Archiving	Number of messages that have been exported in EML format.
Send Message to Archive	Number of messages that have been compressed and placed in the transfer service directory.
Confirm Message Transfer	Shows number of messages are pending confirmation of successful transfer to the data center.
Confirm New Message in Archive	Shows number of messages were sent to the data center and are waiting for their status confirmation.
Confirm Existing Message in Archive	Shows number of messages were not sent to the data center, but which the data center had marked as pending (waiting for successful import from some other source).
Message Cleanup Pending	Shows number of temporary files messages created during import processing waiting for deletion. (No original messages are deleted from the information store.)

You can bring up additional information and perform other functions for each entry on the list using the right-click menu.



The items available from the right-click menu are:

- **Show Progress Detail**—Shows detailed progress for an individual store.
- **Show Failed Messages**—Shows all the messages for which import failed.
- **Retry Failed Messages**—If you have selected the **Keep Messages (allow retry attempts)** option for Import Failure Mode, select this function to try reimporting messages for which the previous import attempt failed.
- **Import Missing Messages**—If **Check Messages** is selected as the action for this information store, selecting **Import Missing Messages** will import those messages that have not already been archived.
- **Cancel Import**—Cancels the process from any further attempt to import or confirm imports. However, any messages that have already been imported to the data center, or are in the process of being imported (messages that were put in transfer directory) will still be imported.
- **Open Activity Log**—Opens the activity log for this information store.
- **Choose Offline Data Owner**—Reserved for Support.
- **Choose Active Directory Owner**—If a user has forgotten to select an owner when they added a PST, you can select one here for an information store pending import on the **Active Imports** tab.
- **Clear All Cached Owners**—The program normally remembers the association of a mailbox or PST to an owner. Check this option if you wish to clear that association out of memory.
- **Open Store Processing Folder**—Opens a unique directory for all file specific to that individual Information Store, including any relevant `webservice.log`, `activity.log`, or temporary processing files. During the gathering and export phases of the mail import process, all files are gathered into this folder, or subdirectories underneath it.

## Import Jobs

Import Jobs allows you to *retire* an import job before completion, or to create a new one if you want to give your import a specific name. Retiring a job does not prevent it from being processed, but it prevents any additional files from being added to that import job. To retire a job, right-click and select **Retire Import Job**.

To show job details, right-click and select **Show Job Details** on an import job to show the following:

- **Updated**—Shows the last time the message was associated to the job.
- **Created**—Shows when the job was created.
- **Registered**—Shows when the job was registered on the backend.
- **Active Imports**—Shows how many messages were originally queued for import, regardless of whether they qualified for import.
- **Supported**—Shows how many messages are supported for import.
- **Unsupported**—Shows how many messages are unsupported for import.
- **Import Needed**—Shows how many messages do not exist on the backend and thus need to be imported.
- **Import Attempted**—Shows how many messages the backend has attempted to import.
- **Transfer Failed**—Shows how many messages the backend could not confirm as transferred.
- **Archive Failed**—Shows how many messages the backend was unable to confirm any status for.
- **Successful**—Shows how many messages were successfully imported.

## Import History

The Import History section allows you to view data on information stores that have already been processed. For each store, columns of information are shown for Email Store (the name of the store), the Result, the Date the archive action was completed, the Total Count of messages, the number of messages that have completed (successfully archived), the number of messages that failed to archive properly, and individual counts for messages that failed Before Confirmation, During Confirmation, and After Confirmation.

To open the activity log for that store, right-click the store and select **Open Activity Log**.

To delete an activity log for a store from import history, right-click the store and select **Delete Entries**.



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