

Symprex AutoArchive Manager

User's Guide

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Version 4.3.

The Symprex logo consists of the word "Symprex" in a white, italicized, sans-serif font, set against a solid orange rectangular background.

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1 INTRODUCTION

Using the AutoArchive feature in Outlook is a cheap and efficient way to archive email and other Outlook data. However, there is no easy, built-in way to set the AutoArchive settings globally on all mailbox folders on Exchange server.

Symprex AutoArchive Manager is a solution to this problem. Using AutoArchive Manager you can update the AutoArchive settings on all mailbox folders in your Exchange installation, both manually for individual mailboxes and automatically for groups of mailboxes (distribution lists and address lists). You can also easily review settings and generate reports of settings.

A command-line utility is also included to enable AutoArchive for each user and to set the Outlook AutoArchive application options. This utility can be used from your login script. Note that these options can also be set via group policies.

In short Symprex AutoArchive Manager is the perfect tool to enforce archiving in your Exchange environment at a low cost.

1.1 System Requirements

Symprex AutoArchive Manager requires:

- When installing on workstation:
Microsoft Windows 2000, XP or Vista
Microsoft Outlook 2000, 2002, 2003 or 2007
- When installing on server:
Microsoft Windows Server 2000, 2003 or 2008
Microsoft Exchange Server 2000, 2003 or 2007
- 10 MB free hard-disk space
- 800 x 600 or higher screen resolution
- Supports terminal services on the above listed server platforms

Symprex AutoArchive Manager can access mailbox folders on any Exchange 2000, 2003 and 2007 server. Please note the recommended settings for Exchange 2003 and 2007 servers described in §4.1.

To get the best results using Outlook AutoArchive it is recommended that you keep Outlook updated with the latest service packs from Microsoft.

1.2 Permissions Requirements

Symprex AutoArchive Manager requires you to be logged on to Windows with a domain account that must have certain permissions in the domain and on your Exchange server (see §5).

1.3 About Outlook AutoArchive

This section includes important information about how Outlook AutoArchive works.

1.3.1 Description of the AutoArchive Feature in Outlook

The following articles from the Microsoft Knowledge Base provide a detailed description of the AutoArchive feature in each Outlook version:

- Description of the AutoArchive feature in Outlook 2007 and 2003
<http://support.microsoft.com/kb/830119>
- Description of the AutoArchive feature in Outlook 2002
<http://support.microsoft.com/kb/290847>
- Description of the AutoArchive feature in Outlook 2000
<http://support.microsoft.com/kb/239652>

Symprex recommends you keep up to date with issues and information that is related to Outlook AutoArchive on Microsoft's support web site.

1.3.2 Items are not Archived as Expected in Outlook

It is important to understand that Outlook may not appear to archive items as expected. This is because the date that is used to determine when an item is archived depends on the type of item.

It is highly recommended that you carefully read the following article from the Microsoft Knowledge Base:

- Items are not archived as expected when you use the Archive or AutoArchive features in Outlook
<http://support.microsoft.com/kb/260217>

Symprex recommends you keep up to date with issues and information that is related to Outlook AutoArchive on Microsoft's support web site.

2 TUTORIAL

2.1 Getting Started

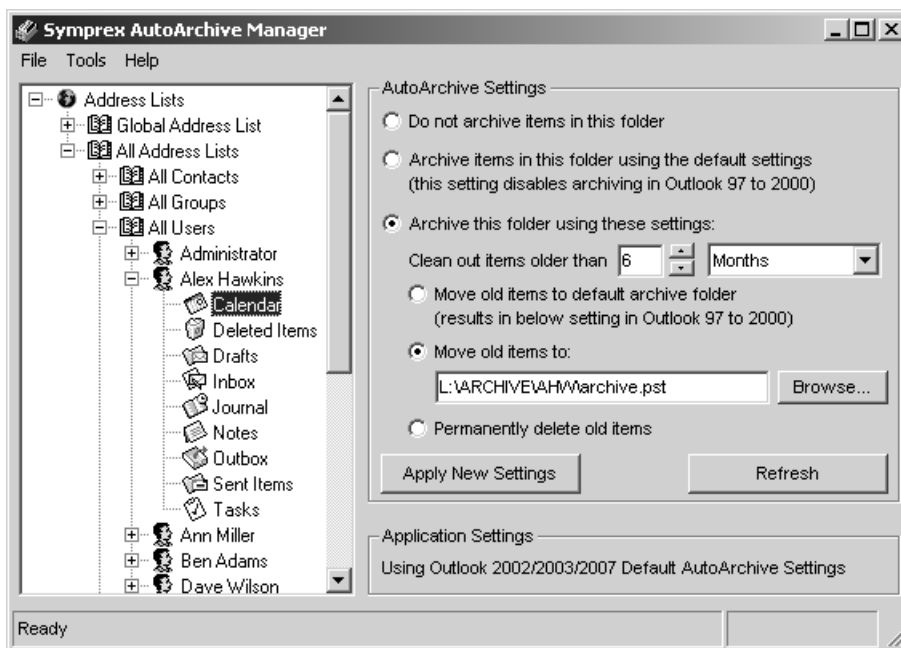
Symprex AutoArchive Manager is started by clicking its icon in the Windows program group. If the application is running in evaluation mode, a window will be displayed advising you of the number days remaining in the evaluation period. If you have purchased a license, you can enter it by clicking the **Enter Registration...** button.

After the splash screen has been displayed, you may be required to select the profile of the Exchange user you wish to connect as. Once successfully logged on, the main application window will be opened.

Symprex AutoArchive Manager requires you to be logged on to Windows with a domain account that must have certain permissions in the domain and on your Exchange server (see §5).

2.2 The Main Application Window

The main application window is split in to two parts.



The left-hand side of the window displays a tree of your Exchange system, including all address lists, distribution lists, mailboxes and folders for each mailbox (excluding any folders that contain Contact items).

Note By default, the application shows all folders within each mailbox. This can be modified by the “Only Show Default Folders” option; see §2.4.

The right-hand side of the window displays the AutoArchive settings for the currently selected folder from the Exchange system tree (when a non-folder node is selected, the controls will be disabled). The controls of the settings resemble those found on the “AutoArchive” tab of the Property pages for a folder in Outlook.

To disable the mechanism for the folder, select the **Do not archive items in this folder** option.

To enable the mechanism for the folder, either select the **Archive items in this folder using the default settings** option, which enables the mechanism for all users of Outlook 2000/2003/2007 using the default user settings, but disables the mechanism for all Outlook 2000 users, or select the **Archive this folder using these settings** option, which is valid for all versions of Outlook.

When the **Archive this folder using these settings** option is selected, you must specify when and how the items must be archived. Set the period using the up and down arrows, and set the period granularity using the drop-down list. If the items are to be moved to a PST file, select the **Move old items to default archive folder** option, or the **Move old items to** option and enter the name of the file. Click the **Browse** button to locate a suitable file. Alternatively, select the **Permanently delete old items** option to have the items deleted from the folder.

Note See §3.4 for more details about the archive path and file name.

Once you are happy with the changes made, click the **Apply New Settings** button. Alternatively, to restore the original settings as currently set, click the **Refresh** button.

By default AutoArchive Manager uses the default AutoArchive settings used in Outlook 2002/2003/2007. You can change this in the Options dialog so that the default AutoArchive settings of Outlook 2000 are used instead. The value of this setting is shown below the AutoArchive settings frame.

2.3 Menus

2.3.1 File Menu

The File menu contains the following items:

- Options – displays the Options dialog (see §2.4).
- Exit – closes the application.

2.3.2 Tools Menu

The Tools menu contains the following items:

- Apply Group Settings – displays the dialog to apply settings to a group of folders (see §2.5).

- Generate Report – generates a report of the settings for the selected group (see §2.6).

2.3.3 Help Menu

The Help menu contains the following items:

- Contents – displays the help system for the application.
- Symprex Web Site – opens your default Internet browser at the Symprex Web Site homepage.
- Symprex Support Page – opens your default Internet browser at the Symprex support web page.
- About – displays the About box for the application.

2.3.4 Context-Sensitive Menu

The context-sensitive menu is displayed when an item in the explorer is right-clicked. The menu contains the following items:

- Apply Settings to Group... – displays the dialog to apply settings to a group of folders (see §2.5).
- Refresh... - refreshes the selected item.
- Generate Report – displays the report dialog (see §2.6).

2.4 Options

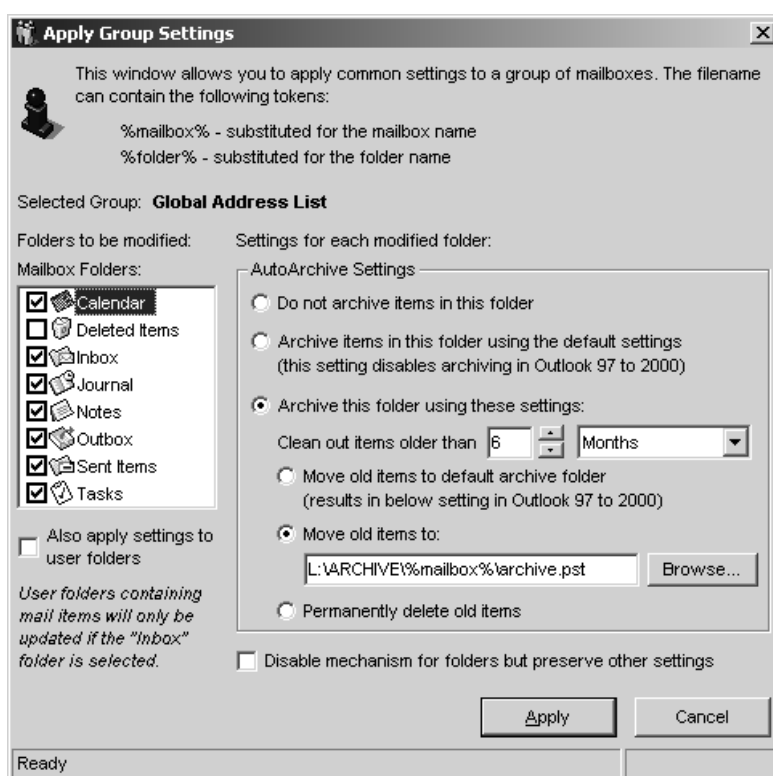
The Options dialog is opened by selecting the **File > Options...** menu item. The following options are available:

- Only Show Default Folders – forces the explorer to only show the default Exchange folders within each mailbox. This can be faster than retrieving all of the folders within a mailbox.
- Use Outlook 2000 AutoArchive Default Settings – select this option to use Outlook 2000 default AutoArchive settings. By default the application uses Outlook 2002/2003/2007 default AutoArchive settings.
- Disable Splash Screen (Registered Version only) – prevents the splash screen from being displayed when the application is started. This setting only has effect in the registered version of the application.
- Use Current Profile – when checked, the application will log on your Exchange Server using the current mail profile if such a profile is currently logged on (for example, if you are using Microsoft Outlook). If a profile is not available or this option is not checked, the “Choose Profile” dialog is displayed when the application starts.

2.5 Apply Settings to Group

This dialog allows permissions to be set on a group of folders (see next page).

To open the dialog, select the appropriate group and either select the **Tools > Apply Permissions to Group...** menu item or right-click the item and select **Apply Permissions to Group**.



On the left-hand side of the dialog, select the folders that you wish to modify. You may choose default folders and/or all user folders (there is no method to specify individual user folders). Then configure the settings for the folders using the controls on the right-hand side of the dialog.

If you wish to only disable the mechanism for each selected folder but preserve all other settings, check the **Disable mechanism for folders but preserve other settings** checkbox. This will switch off the mechanism (i.e. effectively check the **Do not archive items in this folder** option) whilst leaving any other settings unaltered for each selected folder.

The file name for the PST file, where archived items will be saved to, can be customized on a per mailbox/folder basis. This is useful if you wish to archive the items to a central server. To make a customized file name, use the tokens described at the top of the dialog (i.e. %mailbox% to be substituted by mailbox name, and %folder% to be substituted by folder name). Alternatively, leave it blank to use the Outlook default.

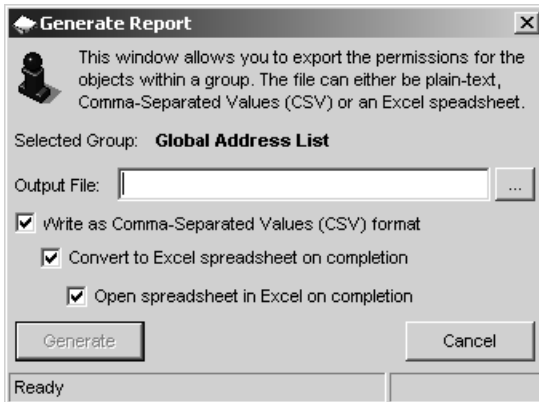
Note See §3.4 for more details about the archive path and file name.

Once you are happy with the settings, click the **Apply** button to apply the changes, or click the **Cancel** button to close the dialog.

2.6 Report

The Report dialog is used to generate a file containing the permissions set on the objects within the selected group of the explorer (see dialog top of next page).

To open the dialog, select the appropriate group and either select the **Tools > Generate Report...** menu item or right-click the item and select **Generate Report...**



Enter the output file in the box at the top of dialog, or click the “...” button to select a file. The file may be generated in one of three formats:

Output Format	Settings
Plain text	De-select the Write as Comma Separated Values format check-box
CSV (Comma-Separated Values)	Select the Write as Comma Separated Values format check-box
Microsoft Excel	Select the Convert to Excel Spreadsheet on completion checkbox, which converts the CSV output file to Excel format.

Note Excel 2000 or later must be installed to generate Excel spreadsheets.

If the output file is in Excel format, the spreadsheet may be opened automatically by selecting the **Open spreadsheet in Excel on completion** checkbox.

To generate the output file, click the **Generate** button or close the dialog by clicking the **Cancel** button.

3 REFERENCE

3.1 What does AutoArchive Manager do?

The AutoArchive Manager application allows a system administrator to centrally configure the AutoArchive settings on all, or individual, folders within mailboxes. The tutorial in §2 explains how to use AutoArchive Manager and how to apply AutoArchive folder settings on individual mailboxes or on groups of mailboxes.

The general Outlook AutoArchive Options for each user/mailbox cannot be set from within the AutoArchive Manager. This is because this information is not stored on Exchange server, but in the registry and Outlook profile for each user.

To administratively configure the general Outlook AutoArchive Options you can use the AutoArchive Manager command-line utility as explained in §3.2 below, or you can use group policies (see the appropriate Microsoft resources for more information).

3.2 What does the AutoArchive Manager Command-line Utility do?

AutoArchive Manager cannot activate the AutoArchive mechanism for a user, or set any of the Outlook AutoArchive Options found in the Outlook Options dialog. This needs to be done either locally on a machine when the appropriate user is logged on or via group policies (please see the appropriate Microsoft resources for more information).

The most important Outlook AutoArchive Options are:

- Enable/disable AutoArchive
- Number of days between AutoArchiving
- Prompt before AutoArchive
- Delete expired items when AutoArchiving (e-mail folders only)
- Default archive file

§3.2.1 explains how to use the command-line utility, while §3.2.2 provides some examples, and §3.2.3 describes how to register the command-line utility using your license key for AutoArchive Manager.

3.2.1 Command-Line Utility Usage

The AutoArchive Manager command-line utility is a small executable file named **aaconfig.exe**, which is installed together with AutoArchive Manager. The utility can be used from a login script or via netlogon. If you run **aaconfig.exe** without any arguments it will show instructions on how to use it.

The AutoArchive Manager command-line utility takes an argument identifying the profile you wish to update (for the user that is currently logged in) and then arguments corresponding to the Outlook AutoArchive Options:

```
aaconfig /profile=name [/enable=on/off] [/days=n] [/prompt=on/off]
[/delete=on/off] [/arcordelold=on/off] [/showarcfolder=on/off]
[/defperiod=months/weeks/days] [/defgranul=n] [/defmethod=move/delete]
[/newpstformat=preferunicode/preferansi/enforceunicode/enforceansi]
[/path=path] [/silent]
```

Where

/profile	Outlook profile name (specify * for default profile).
/enable	Archive enabled setting.
/days	Archive every days setting.
/prompt	Prompt before AutoArchive setting.
/delete	Delete expired items when archiving (e-mail folders only) setting.
/arcordelold	Archive or delete old items setting 1).
/showarcfolder	Show archive folder in folder tree setting 1).
/defperiod	Default period setting 1).
/defgranul	Default archive granularity setting 1).
/defmethod	Default method setting 1).
/newpstformat	New PST format 2).
/path	Default archive path setting.
/silent	Silent mode.

1) Outlook 2002 and later only. 2) Outlook 2003 and later only.

The command-line utility will not run in silent mode until it has been registered.

3.2.2 Command-Line Utility Examples

To set the AutoArchive settings of the default profile to auto-archive enabled, every 30 days, no prompt, delete expired items, and the default path and file name to *m:\archives\usr_xxx.pst*, run the following command (on one line):

```
aaconfig /profile=* /enable=on /days=30 /prompt=off /delete=on
/path=m:\archives\usr_xxx.pst /silent
```

To set the AutoArchive settings of the profile *Outlook Profile* to auto-archive enabled, every 7 days, no prompt, delete expired items, and default path and file to *M:\User Archives\usr_xxx.pst*, run the following command (on one line):

```
aaconfig /profile="Outlook Profile" /enable=on /days=30 /prompt=off /delete=on
/path="M:\User Archives\usr_xxx.pst"
```

In the above example, note the quotes around names containing spaces.

3.2.3 Command-Line Utility Registration

To register the aaconfig.exe command-line utility, simply run it on the machine where you have registered AutoArchive Manager. A file called aaconfig.lic will

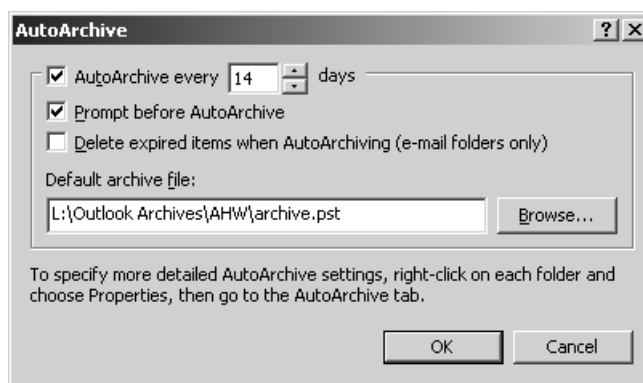
be created in the same directory `aaconfig.exe` is run from (make sure you have write permissions to this directory).

3.3 How to manually configure AutoArchive via Outlook

3.3.1 To Turn on AutoArchive for a Mailbox via Outlook

To manually turn on AutoArchive for a mailbox via Outlook, you must do the following:

1. On the **Tools** menu, click **Options**, and then click the **Other** tab.
2. Click **AutoArchive** to open the AutoArchive options dialog.



NB. Dialog from Outlook 2000. Later versions include additional options.

3. Click to select the **AutoArchive Every** check box, and then specify how often the AutoArchive process will run by typing a number in the **days** box.
4. Click to select the **Prompt Before AutoArchive** check box, if you want to be notified before the items are archived.
5. In the **Default archive file** box, type a file name for the archived items to be transferred to, or click **Browse** to select from a list.
6. Click **OK** twice to close **Options**.

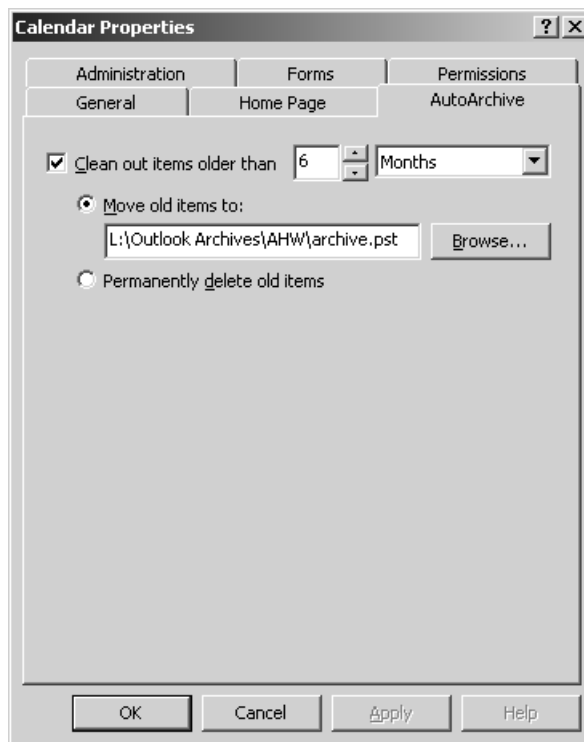
AutoArchive Manager is unable to perform the actions described in this section. To administratively set these settings you must use the AutoArchive Manager command-line utility, which comes with AutoArchive Manager, as explained in §3.2 above (using the command-line utility, for example, during a login script).

3.3.2 To Set AutoArchive Properties for a Folder Manually in Outlook

To manually set AutoArchive properties for a folder in Outlook, you must do the following:

1. In the **Folder List**, right-click the folder that you want to AutoArchive, and then click **Properties** on the shortcut menu.

2. Click the **AutoArchive** tab to see the AutoArchive settings.



NB. Dialog from Outlook 2000. Later versions include additional options.

3. To set AutoArchive for this folder, click to select **Clean out items older than**.
4. To specify when items should be automatically transferred to your archive file, type a number in the **Months** box.
5. To specify a file for the archived items to be transferred to, click **Move old items to**.
6. In the **Move old items to** box, type a file name for the archived items, or click **Browse** to select from a list, and then click **OK**.

AutoArchive Manager allows the administrator to *centrally* perform the actions described in this section. AutoArchive Manager can even change these settings on any number of mailboxes, and on any selected folder types, in *one* step.

3.4 The Archive Path

When AutoArchive is first enabled for a folder in Outlook itself, a default PST file name is specified. Symprex AutoArchive Manager can not display this file name and in this case the file name is instead displayed as “<Using Outlook Default>”.

Normally you will want to specify a path to a shared network location, which is accessible to users that run Outlook (and therefore AutoArchive). To leave the setting as its default, empty the text box, which will re-instate the default setting.

4 MISCELLANEOUS ISSUES

This section describes miscellaneous issues that relate to the operation of the application.

4.1 Exchange 2003/2007 Additional Information

Exchange 2003/2007 limits how many times specific objects on the server can be opened per session when using the MAPI interface. One of these limits affects AutoArchive Manager because the default value is very low.

To resolve this problem, you can add a registry key that changes the limit that affects AutoArchive Manager. This limit overrides the default limit of the server object in question.

Warning If you use Registry Editor incorrectly, you may cause serious problems that may require you to reinstall your operating system. Symprex cannot guarantee that you can solve problems that result from using Registry Editor incorrectly. You use it at your own risk.

To add a registry key that change the limit, which affects AutoArchive Manager, follow these steps:

1. Click **Start**, click **run**, type **regedit**, and then click **OK**.
2. Expand the following registry subkey of HKEY_LOCAL_MACHINE:
`\SYSTEM\CurrentControlSet\Services\MSExchangeIS\ParametersSystem`
3. Right-click **ParametersSystem**, point to **New**, and then click **Key**.
4. Type **MaxObjsPerMapiSession**, and then press ENTER to name the new subkey.
5. Right-click **MaxObjsPerMapiSession**, click **New**, and then click **DWORD Value**.
6. Type **objtFolder**, and then press ENTER to name the object.
7. Right-click **objtFolder**, and then click **Modify**.
8. In the **Value data** box, select **Hexadecimal** as **Base**, then type **1000**, and then click **OK**.

Note This setting is not required, but is recommended to be set.

5 REQUIRED ACCOUNT PERMISSIONS

Symprex AutoArchive Manager requires you to be logged into Windows with a domain account that has permissions on Exchange as described below.

5.1 Exchange 2000/2003 Account Permissions

To make sure your account has the necessary permissions on Exchange 2000 or 2003, follow these steps:

Note If your account is a member of the **Domain Admins** group, and not of any of the Exchange security groups, it already has the necessary permissions.

Step 1

Open Exchange System Manager, then:

- Select your server (or mailbox store).
- Right-click and select **Properties** to open the **Properties** dialog.

Step 2

Select the **Security** tab in the server (or mailbox store) properties dialog, then:

- Add or select your account.
- Allow the **Administer information store** right.

Repeat the above steps for appropriate servers (or mailbox stores) as required.

Your account now has the required permissions.

5.2 Exchange 2007 Account Permissions

To make sure your account has the necessary permissions on Exchange 2007, follow these steps:

Note If your account is a member of the **Domain Admins** group, and not of any of the Exchange security groups, it already has the necessary permissions.

Step 1

Open Exchange System Manager, then:

- Assign your account the **Administer information store** right on your server (or mailbox store) by executing one of the following commands:

To assign the right on your server:

```
Get-MailboxServer "YourServer" |  
add-adpermission -user "YourAccount" -extendedrights  
ms-Exch-Store-Admin
```

To assign the right on your mailbox store:

```
Get-MailboxDatabase "YourServer\YourMdb" |  
add-adpermission -user "YourAccount" -extendedrights  
ms-Exch-Store-Admin
```

Note that you need to replace **YourServer** with the name of your server, **YourMdb** with the name of your mailbox store, and **YourAccount** with the account (domain\account) you want to assign the right.

Repeat the above steps for appropriate servers (or mailbox stores) as required.

Your account now has the required permissions.

6 CONTACTING SYMPREX

6.1 Visit Our Web Site

Our web site provides general information about Symprex and our products:
<http://www.symprex.com>

If you experience technical problems with one of our products, please visit our support page:
<http://www.symprex.com/support>

6.2 Contact Us by Email

Please email general enquiries about Symprex or our products to:
info@symprex.com

Please email sales enquiries to:
sales@symprex.com

Please email support enquiries to:
support@symprex.com

6.3 Contact Your Local Reseller

Symprex has partners and resellers in most countries. You can find your local reseller here:
<http://www.symprex.com/resellers>