

The following process is only applicable to archiving messages received in Notes. Staff who wish to archive messages that have been migrated from other clients please refer to **Archiving migrated messages (MA27)**.

**What do I need know about an Archive?**

- Archiving messages allows you to free up space and improve performance.
- Messages can be archived to a single database or you can have multiple archive databases.
- The folder structure of an archive database resembles the folder structure of your mail, so messages are easy to find.
- Archiving can be automated by setting up a schedule, or manually initiated.
- More than one archive can be created.

The following process will demonstrate archive creation for local storage. For example on your C: Drive.

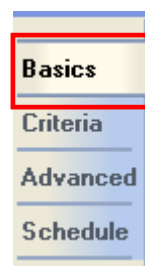
**To create an archive**

1. Have your Mail tab opened.
2. Click **Actions > Archive > Settings**.

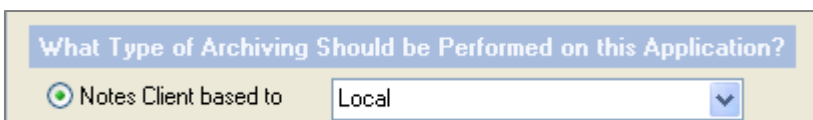
- The **Archive Settings** window will display with a series of tabs on the left hand side.

Setting up the Archive

3. Click the **Basics** tab

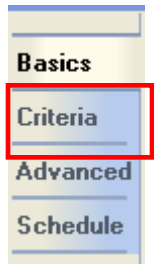


- To archive locally set **Notes Client based to** Local

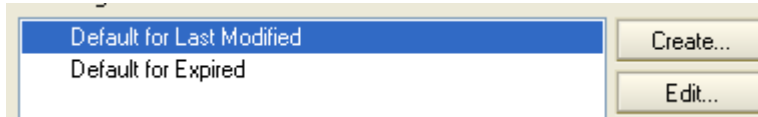


Archiving criteria

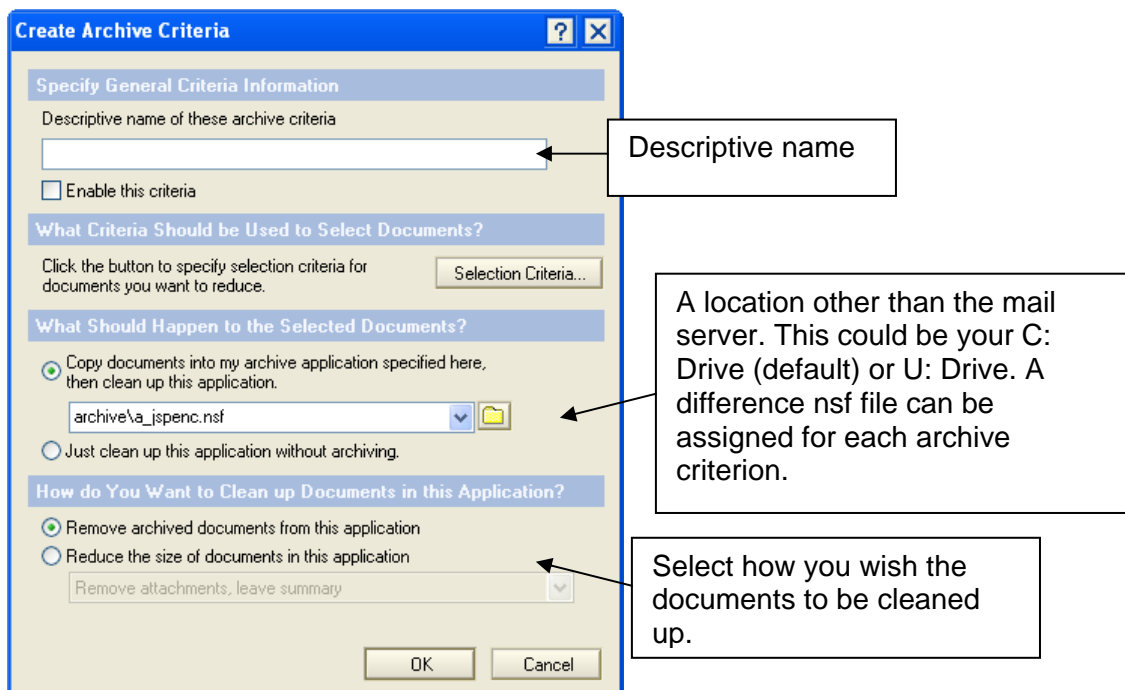
4. Click the **Criteria** tab to setup archiving criteria.



**Tip:** Two default Criteria's have already been created for you but they have not been enabled.



5. Click **Create** to create the archiving criteria.



6. Add a descriptive name for the archive criteria.

7. Check the box **Enable this criteria**.

8. Select the action to occur for the selected documents.

9. Verify the location of the archive file.

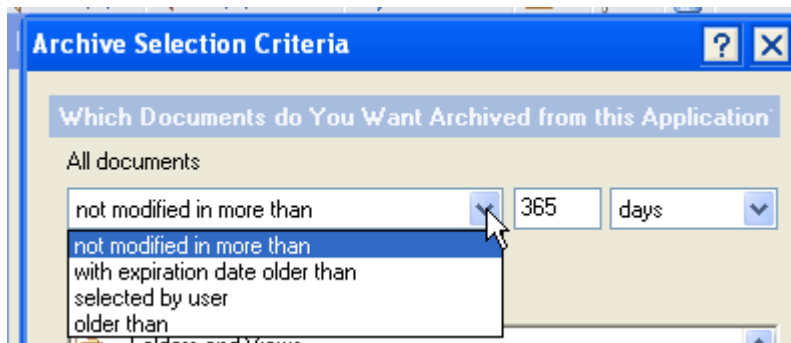
10. Select the cleanup action for the selected documents.

### Selection Criteria

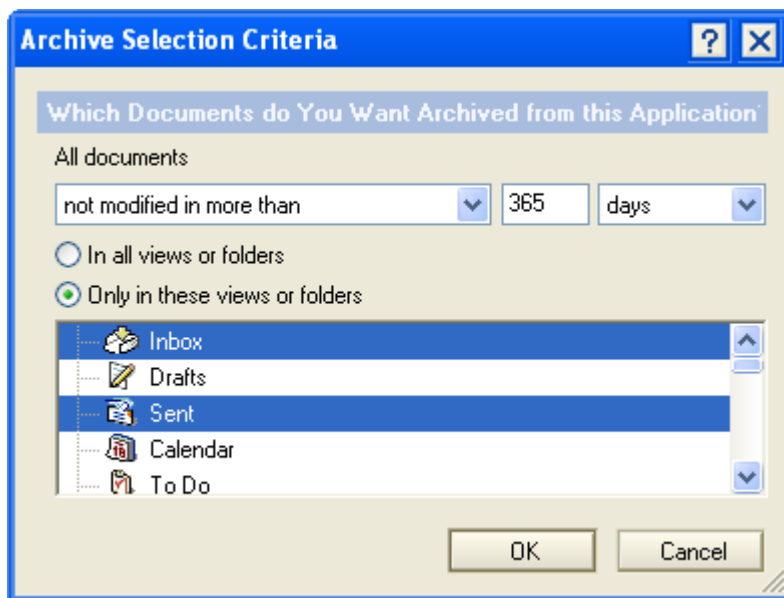
To define selection criteria for an archive:

11. Click the **Selection Criteria** button.

12. Select how documents are to be selected from the **All Documents** drop down-menu.

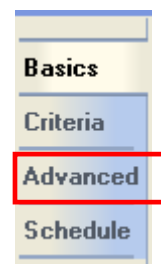


13. Select the folders or views to be used for Archiving. If a specific set of views or folders are to be selected you can use **Click**, **Ctrl+Click** to select specific views or folders.



14. Click **OK**.

Advanced tab

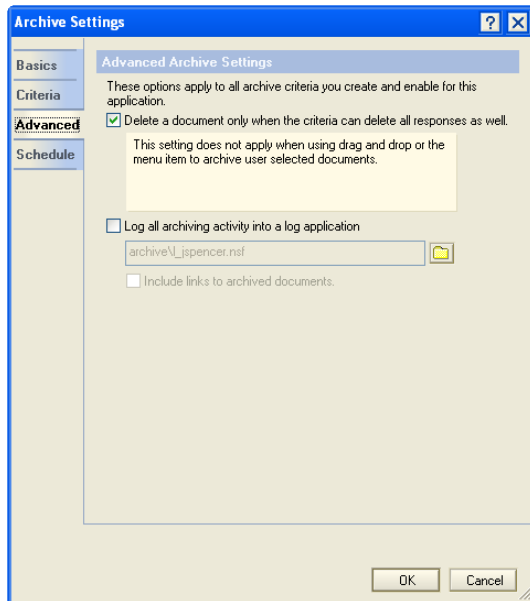


15. Click on the **Advanced** tab for Archive log settings and management of mail thread responses.

16. Select **Delete a document only when the criteria can delete all responses as well** to avoid archiving responses which are part of a mail thread. This ensures all messages are archived and avoids broken threads and not being able to display them when viewed in the Archived.

17. Select **Log all archiving activity into a log application** to keep a history of all archiving operations. The folder icon allows you to select a filename and path for the archive log.

18. Select **Include links to archive documents** (optional) to allow locating of messages without browsing the archive.

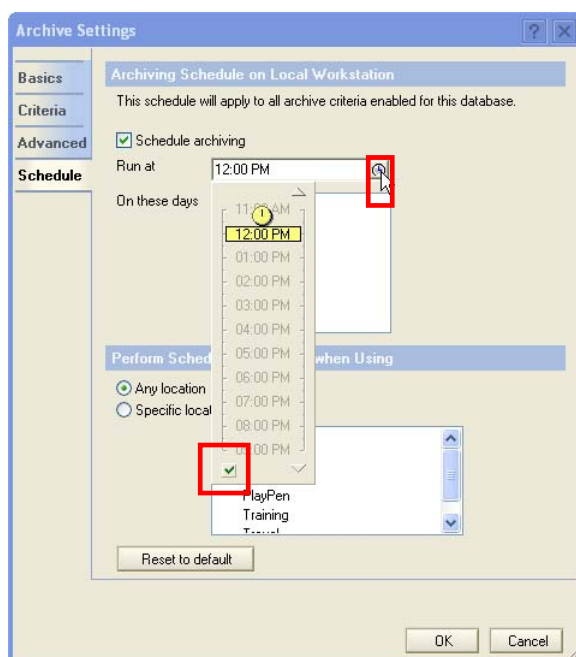
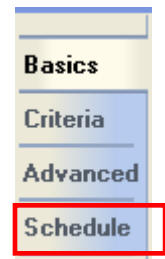


### Schedule tab

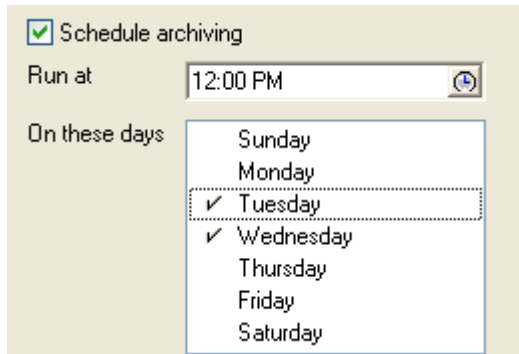
1. Click the **Schedule** tab to specify an archive schedule. (The schedule does not apply for archives where the archive criterion is set to **Selected by user**).

### Archiving Schedule on Local Workstation section

2. Click Schedule archiving.
3. Click the **clock** icon to set the time for the archive schedule. (refer to image below).
4. Click the **tick** (it is a green tick) to accept the time.



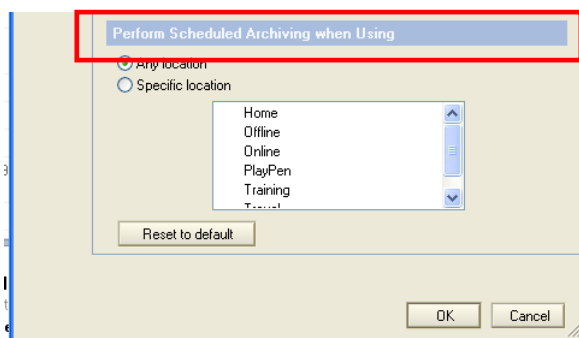
5. Select the days you wish the archiving to occur on. Each selected day will appear with a tick beside it.



### Perform Archiving when Using section

6. Select **Any location** to perform scheduled archiving on all locations set up in your Notes client

7. Select **Specific location** and select the locations on which scheduled archiving is to occur.



8. Click **OK** to accept settings. Click the **Reset to default** button to remove any customisations.

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**Tip:** To run an Archive criterion refer to *How to run an Archive (MA27)*.

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**Tip:** Extra messaging quota can be requested at <http://www.its.monash.edu.au/staff/email/quota/purchasing.html>

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The archiving feature of Lotus Notes can be used as a temporary storage facility for mail messages; however it is not suitable for the storage of valuable corporate records. Mail messages, like all records, can be classified into 3 categories

- records which may be destroyed immediately, such as ephemeral records,
- temporary but important and useful records that must be held for short periods prior to destruction, and
- records of permanent value to the university.

Mail messages that are important and useful to staff in performing their duties and mail messages that need to be retained permanently for business, legal or evidentiary purposes should be stored in a recordkeeping system together with other documents relating to the same subject, which can be accessed and retrieved over time by Monash University staff. Such a recordkeeping system could be an organised and backed-up network drive, or TRIM Electronic Records Management System, if it is available in your area.

More information on retention and disposal can be found at:

<http://www.adm.monash.edu.au/records-archives/archives/disposal/index.html>

**NOTE:** *The Crimes (Document Destruction) Act 2006 and the associated Evidence (Document Unavailability) Act 2006 create formal and specific penalties for destruction of documents that are known to be reasonably likely to be required in evidence, where the destruction is intended to prevent the documents from coming into court, in situations where no litigation has actually commenced.*