

Archiving – Lotus Notes solution to local folders

A Lotus Notes archive allows you to move documents off the Monash mail server and store them on your local or network drive. This assists in managing email quota.

The following types of documents can be archived:

- emails,
- calendar entries, and
- to do items.

What do I need to know about an Archive?

- Archiving allows you to free up space and improve performance.
- Documents can be archived to a single archive or you can have multiple archives with different names.
- The folder structure of an archive database resembles the folder structure of your mail, so messages are easy to find.
- Your archive is opened in a tab in Lotus Notes, allowing you to quickly and easily view archived mail, calendar and to do.
- Archives can be configured to function manually or according to a schedule.
Note: Mail messages migrated from Thunderbird can only be archived manually. This is equivalent to the way local folders functioned in Thunderbird.

Creating an archive

Before an archive can be used, it needs to be created. To create your archive:

- follow the steps in the **General Settings** section of this document, then
- follow the steps in the appropriate scenario to complete the archive setup.

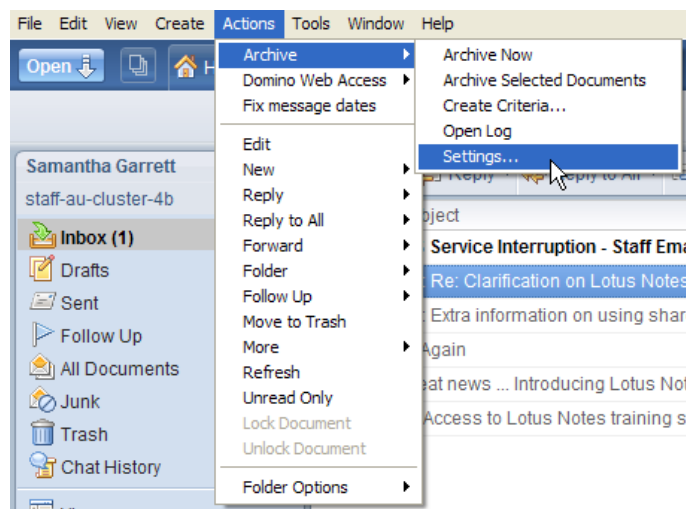
The table below outlines the different types of archives, and the scenarios that cover them in this document.

What to archive	How to archive	See scenario
Mail migrated for Thunderbird	Manually	1
Lotus Notes mail, calendar and to do	Manually	1
Lotus Notes mail, calendar and to do	Automatically (scheduled)	2

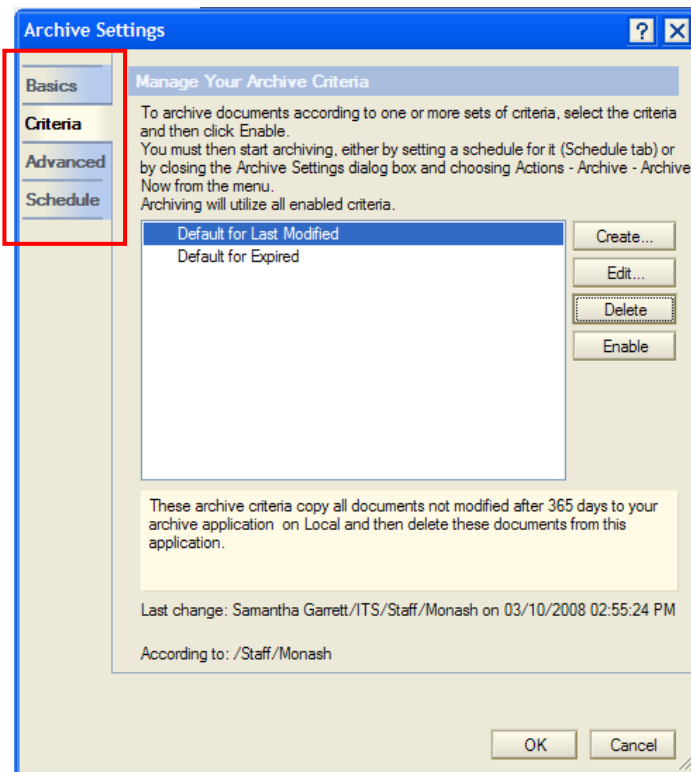
General Settings

Follow the steps below to begin creating your archive.

1. Ensure that your **Mail** tab is open.
2. Click **Actions > Archive > Settings**.

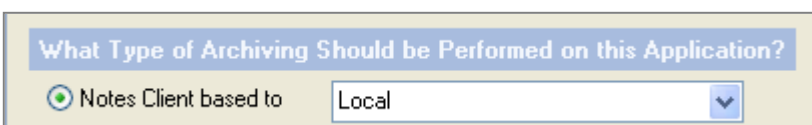


- The **Archive Settings** window will display with a series of tabs on the left hand side.



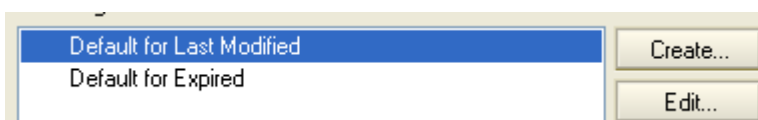
3. Click the **Basics** tab

4. Ensure that **Notes Client based to** is set to **Local**. This ensures that the archiving takes place on your local machine.



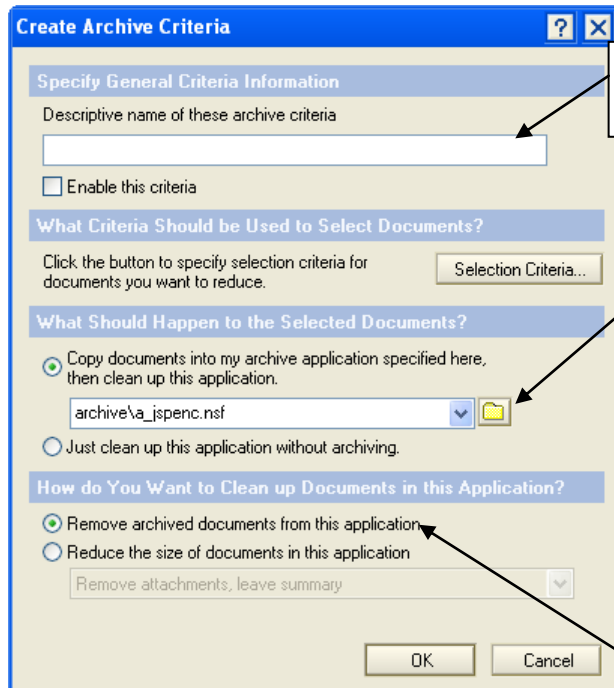
5. Click the **Criteria** tab.

Tip: Two default Criteria's have already been created for you but they have not been enabled. We will be creating a new criterion.



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

- The **Create Archive Criteria** dialogue box will open. Use the explanations below to assist you in steps 6 to 9.



Descriptive name
E.g. Sam's Archive 2008

Location and filename

- This is a location other than the mail server.
- If you leave the default setting, the archive will be stored in the local Lotus Notes data folder on your machine.
- You can also select to store the archive in another location.
- **NOTE:** A different nsf filename **must** be given to each archive. Using the same filename will result in the original archive being overwritten.

Cleanup Action

Select how you wish the documents to be cleaned up. The default setting will remove emails that are archived from the server.

6. Add a **descriptive name** for the archive criteria.

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

8. Verify the default **location to store the archive**. Alternatively, select another location using the folder button. Specify a **filename** for the archive.

9. Select the **cleanup action** for the selected documents.

Note: The next steps differ according to the type of archive you are creating. Please see either:

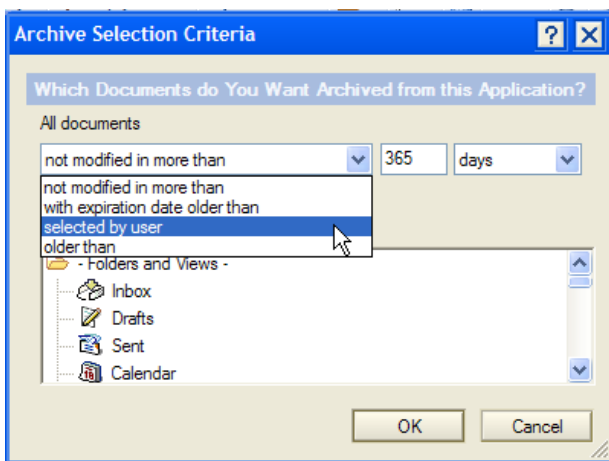
- Scenario 1: Archive migrated mail or Lotus Notes documents manually, or
- Scenario 2: Archive Lotus Notes documents automatically (with a schedule).

Scenario 1: Archive migrated mail or Lotus Notes documents manually.

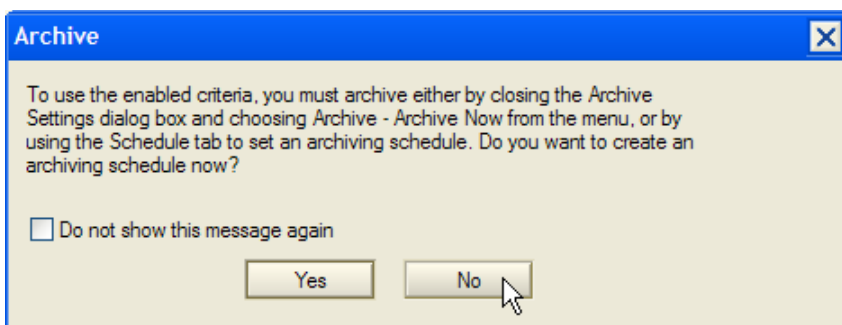
Note: This scenario will create an archive which will allow you to *manually* archive emails, calendar entries and to do items. It is appropriate for use with mail migrated from Thunderbird or items created in Lotus Notes.

Before following these steps, first ensure you have followed all the steps under **General settings**.

1. Click the **Selection Criteria** button.
2. Select **selected by user** from the **All documents** drop down box.



3. Click **OK**.
4. Click **OK** again to close the **Create Archive Criteria** dialogue box.
5. A box will open asking if you would like to create an archiving schedule. Click **No**.



- Your archive has been successfully created.
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Where to now?

- To configure advanced settings in your archive, refer to the **Advanced archive settings** at the end of this document.
 - To learn about putting documents in your archive, please refer to learning topic ***How to run an archive (MA27)***.
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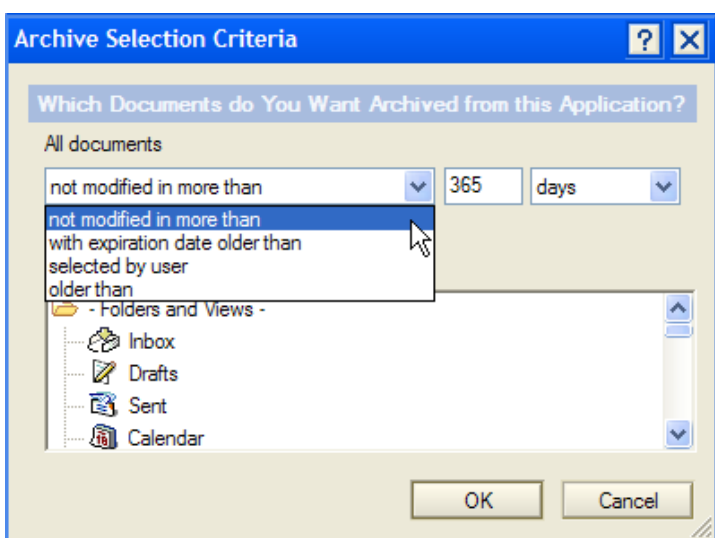
- To learn about documents in your archive, please refer to learning topic ***How to view and manage messages in an archive (MA28)***.

Scenario 2: Archive Lotus Notes documents automatically (with a schedule).

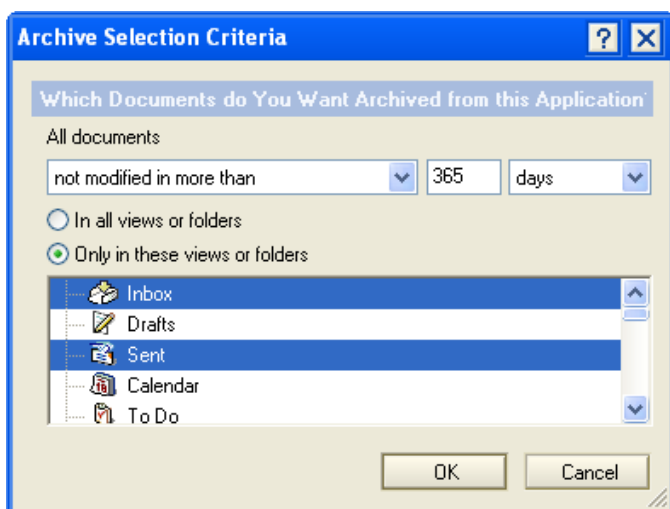
Note: This scenario will create an archive which will automatically archive emails, calendar and to do items according to a date criterion. It is appropriate for use only with mail created in Lotus Notes.

Before following these steps, first ensure you have followed all the steps under **General settings**.

1. Click the **Selection Criteria** button.
2. Select one of the following options from the **All documents** drop down box.
 - with expiration date older than
 - not modified in more than (recommended)
 - older than



3. Specify the number of days after which documents should be archived.
4. Select the folders or views you wish documents to be archived from. If a specific set of views or folders are to be selected, you can use **Click, Ctrl+Click** to select multiples.

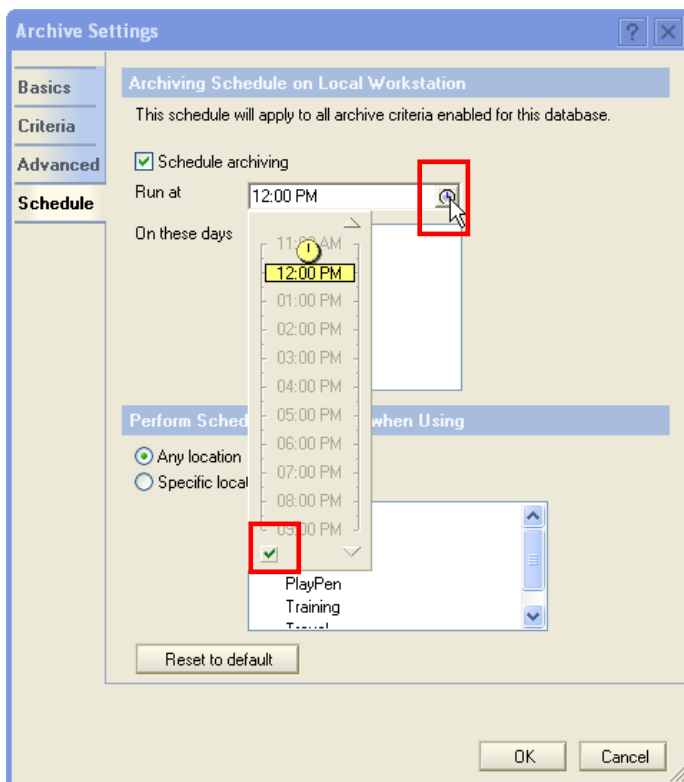


5. Click **OK**.

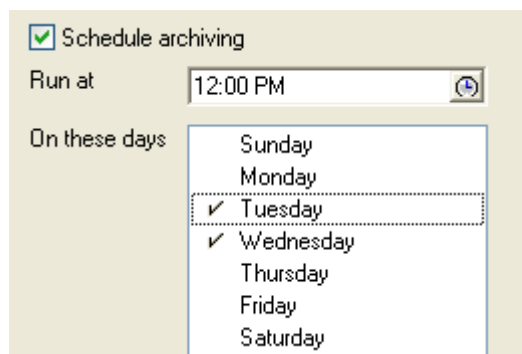
Creating a schedule

The following steps create the schedule to accompany your automatic archive.

1. Click the **Schedule** tab to specify an archive schedule.
2. Tick **Schedule archiving**.
3. Click the **clock** icon to set the time for the archive schedule (refer to image below).
4. Click the **green tick** to accept the time.

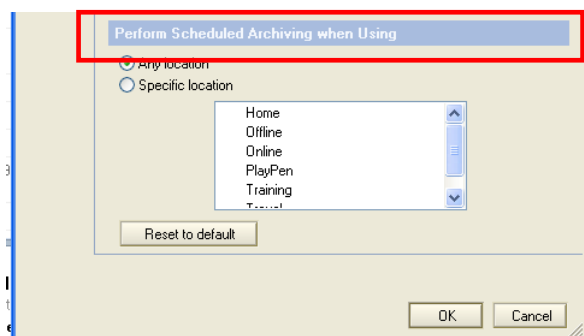


5. Select the days you wish the archiving to occur. Each selected day will appear with a tick beside it.



6. Select one of the following options from the **Perform Scheduled Archiving when Using** section:

- **Any location** to perform scheduled archiving on all locations set up in your Notes client (recommended).
- **Specific location** to select the locations on which scheduled archiving is to occur. If choosing this options, tick the locations you want archiving to occur.



7. Click **OK** to save the scheduling settings.

Tip: Click the **Reset to default** button to remove any customisations.

Where to now?

- To configure advanced settings in your archive, refer to the **Advanced archive settings** at the end of this document.
 - To learn about managing documents in your archive, please refer to learning topic ***How to view and manage messages in an archive (MA28)***.
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Advanced archive settings

These settings can be configured in both of the archiving scenarios outlined above.

1. Click **Actions > Archive > Settings**.

2. Click on the **Advanced** tab.

2. 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.

3. 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.

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

5. Click **OK** to save your changes.



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.*