Quest

Metalogix® Archive Manager for Files 8.7

Quick Start Guide

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Legend

CAUTION: A caution icon indicates potential damage to hardware or loss of data if instructions are not followed.

IMPORTANT, NOTE, TIP, MOBILE OR VIDEO: An information icon indicates supporting information.

Metalogix® Archive Manager for Files
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1

Introduction

Metalogix Archive Manager for Files is a software solution for archiving files transparently while preserving the existing structure of disks, folders and files. It provides full version management with the ability to retrieve any of the versions. Archived files are replaced on a file server with a shortcut, which takes up much less space, yet they are available for end users who can work with them as usual. Moreover, our full-text search engine searches through the archives by applying various search criteria.

With Metalogix Archive Manager for Files you can increase the capacity of fast and expensive storage media by using cheaper slower devices without increasing access time to frequently used files. The administrator can define which files are considered as frequently used (fast access to them is crucial) and infrequently used (fast access to them is not crucial) by specifying a time interval from the time of their last usage. When that interval elapses, the file is automatically replaced with a shortcut during archiving. Administrators can define more such time spans and group files included in categories, assigning each category a different time span.

The system is fully automated and the administrator needs to specify only the attributes of its behavior. It allows centralized search through company data which is faster and more efficient than searching through different machines/systems.

The *primary* components of Metalogix Archive Manager for Files are as follows:

- **Archive Manager for Files** - archival solution for files.
- **Hierarchical Storage Manager (HSM)** - file storage manager that manages one or more dedicated or shared file-servers across the organization. HSM ensures that files with identical content are stored only once regardless of where their respective original file is located.

Metalogix Archive Manager for Exchange can be extended with *optional* components to enhance its capabilities. The following optional components are installed with the Express installation.

- **Archive Manager Search** - full text search engine capable of searching archived emails.
- **ArchiveWeb** - online archive interface with advanced search and reporting functionality.

Metalogix Archive Manager is a highly scalable product that can be installed into a more complex environment than described within this guide. To secure load balancing and facilitate multiple archiving for large organizations, Metalogix Archive Manager provides you with the ability to configure several Archive Manager servers. For more information about advanced installation in distributed environments please refer to the *Advanced Install Guide for Archive Manager for Files.*

File archive and retrieval process

Archive Manager for Files transfers files to HSM which manages the storing and retrieving of files. The file is replaced by a shortcut and the information in the shortcut is stored either in an Oracle or MS SQL Server database that is used by HSM. The HSM system passes the original file to a file store that is specified by the administrator which compresses the file “on the fly”. Only shortcut of a few kilobytes remains at the file’s original location. This shortcut includes information about the new location of the archived file and bears the same name and the same file extension as the original file (in the case of FSA [standard] shortcuts). The only difference a user notices is that the shortcut is displayed with a slightly modified icon and the name of the file is written in blue (in Explorer view).

Users work with archived files as usual. When an archived file is reopened, Archive Manager for Files passes the information from the shortcut to HSM which restores the file from the store. Users experience a seamless transition as if they are working in a normal environment.

HSM uses the Single-instance storage (SIS) service that takes multiple copies of the content and replaces them with a single shared copy. It allows version control, eliminates data duplication, and increases storage and retrieval efficiency. With version control activated, HSM keeps track of who modified the document, when did the modification occur and what was modified. The administrator can retrieve older versions including files whose shortcuts were deleted from the file server.

2

Deployment Plan

Planning the deployment of the Metalogix Archive Manager for Files depends on the storage capacities required in your organization. The quick start guide describes the deployment for lightweight usage scenarios that are based on the following assumptions:

- You have acquired a trial license for Metalogix Archive Manager for Files and you want to evaluate the product in a test environment.
- Your organization does not have a dedicated file storage system.

The following illustration describes the way in which the constituent parts are interrelated and arranged for a typical lightweight deployment.

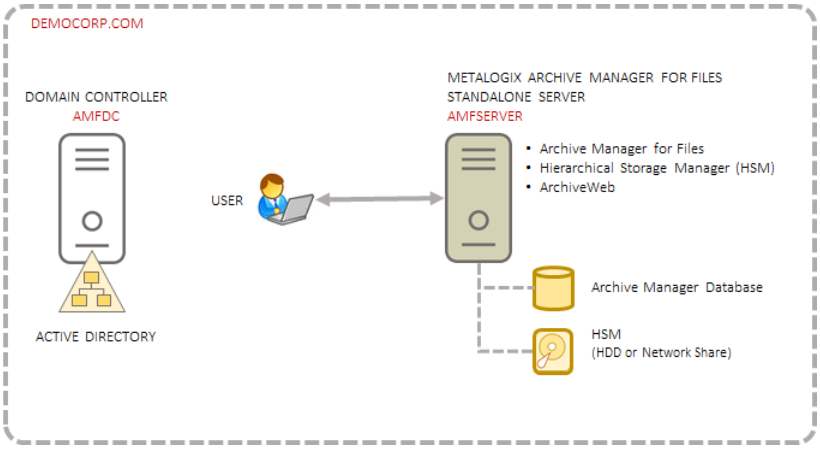


Figure 1. Topology for a standalone Metalogix Archive Manager for Files deployment

In this deployment topology, the Metalogix Archive Manager for Files is installed on a standalone server and interacts with the HSM component to archive and restore files. Users retrieve archived files from shortcuts that are displayed in their file folders.

When you choose the Express installation option Metalogix Archive Manager for Files is installed on the standalone server with the full set of components: Archive Manager for Files, Hierarchical Storage Manager (HSM) and ArchiveWeb. The server also contains the Archive Manager Database instance that contains the configuration databases for various features and components. If you do not have a dedicated network share for archive storage, HSM uses the local hard drive for storing archived files.

3

System Requirements

The requirements described below are applicable for installing the Archive Manager for Files server

NOTE: System requirements for optional components of the Metalogix Archive Manager for Files are described in the corresponding document for each optional component.

Hardware

Component	Minimum specification	Recommended specification
Number of Processor Cores	4	8
Main Memory	4 GB	12 GB
Hard Disk	10 GB	10 GB

NOTE: The application, log files and cache folders require 10 GB of HDD space. If the Archive Manager for Files server includes the database, and is used as a local storage for archived messages, then the the Hard Disk size must be revised to add more space for the database and the file store.

Operating System

- Windows Server 2012
- Windows Server 2012 R2
- Windows Server 2016
- Windows Server 2019
- Windows Server 2022

NOTE: Latest updates and service packs for servers are recommended.

Windows Server Roles

- Web Server (IIS)

- Web Server / Common HTTP Features / HTTP Redirection
- Web Server / Performance / Dynamic Content Compression
- Web Server / Security / Basic Authentication
- Web Server / Security / Windows Authentication
- Web Server / Application Development
  - .NET Extensibility 4.5
  - ASP.NET 4.5
- Management Tools / IIS 6 Management Console
- Management Tools / IIS 6 Management Compatibility / IIS 6 Metabase Compatibility
- Management Tools / Management Service

Windows Features

- Remote Server Administration Tools
  - Role Administration Tools / AD DS and AD LDS Tool / Active Directory module for Windows PowerShell
- .NET Framework 4.5 Features

For Windows Server 2012 and 2012 R2

- .NET Framework 4.5 Features / .NET Framework 4.5
- .NET Framework 4.5 Features / ASP.NET 4.5
- .NET Framework 4.5 Features / WCF Services (all checkboxes under this item)

For Windows Server 2016

- .NET Framework 4.6 Features / .NET Framework 4.6
- .NET Framework 4.6 Features / ASP.NET 4.6
- .NET Framework 4.6 Features / WCF Services (all checkboxes under this item)

For Windows Server 2019

- .NET Framework 4.7 Features / .NET Framework 4.7
- .NET Framework 4.7 Features / ASP.NET 4.7
- .NET Framework 4.7 Features / WCF Services (all checkboxes under this item)

For Windows Server 2022

- .NET Framework 4.8 Features / .NET Framework 4.8
- .NET Framework 4.8 Features / ASP.NET 4.8
- .NET Framework 4.8 Features / WCF Services (all checkboxes under this item)

Redistributable packages

- Microsoft Visual C++ 2013 Redistributable Package (x64)
- Microsoft Visual C++ 2015-2022 Redistributable Package (x64)
- Microsoft Visual C++ 2015-2022 Redistributable Package (x86)

.NET 4.8

Download and install .NET Framework 4.8 from the following link:

https://dotnet.microsoft.com/en-us/download/dotnet-framework/thank-you/net48-web-installer

Database Servers and Drivers

- Microsoft SQL Server 2012 to Microsoft SQL Server 2019
  - Microsoft OLE DB Driver 18 for SQL Server, or newer
- Azure SQL Database
- Oracle 12c to Oracle 19c
  - Oracle client (x86 or x64)

Web Browsers

Web browsers are required for ArchiveWeb and is included here because this optional component is installed automatically if Express installation is considered.

- Microsoft Edge current version
- Mozilla Firefox current version
- Chrome current version
- Opera current version

File Systems (Sources)

- Windows Server 2012
- Windows Server 2012 R2
- Windows Server 2016
- Windows Server 2019
- Windows Server 2022
- NTFS including mount-point support

- ReFS
- NetApp Filer (Cluster Mode only)
- EMC VNX

Clients and protocols

- Windows Clients
- Macintosh clients when CIFS/SMB protocol is used
- AFP protocol (e.g. ExtremeZ-IP software)

Additional Information

- Installations on Domain Controllers are not supported.
- For remote archiving on Windows shares, NetApp (Cluster Mode) or VNX, we recommend installing the software on a dedicated server.
- The software installs web applications into the Default Web Site. This could cause conflict with other applications like Microsoft CRM or Microsoft SharePoint. To change the installation website, manual changes are required after the installation. Please contact Technical support in such cases.
- Metalogix Archive Manager for Files is fully supported in a virtualized environment.

4

Pre-installation Tasks

Before you begin installing Metalogix Archive Manager for Exchange, your environment must be configured to ensure a successful installation and usage experience of the Metalogix Archive Manager for Exchange.

- Setup a Superuser account
- Download the install media

Setup a Superuser account

A *Superuser* account is a windows account that runs the Archive Manager services and has elevated privileges to work with the Metalogix Archive Manager for Files administration tools, database and exchange server. For the Express installation we will use the *Enterprise Administrator* as the *Superuser*.

NOTE: To ensure a quick deployment, we recommend that all constituent servers and software be installed by the *Enterprise Administrator* to skip advanced concepts about access permissions with other user types.

The *Superuser* must be granted the following memberships/privileges on the Metalogix Archive Manager for Files server:

1. Must be a member of the local *Administrators* group.
2. Must be granted log in rights to the Archive Manager database instance with the *sysadmin* role.
3. Must be granted remote desktop access if necessary. For more information see Steps to grant Remote Desktop Access.

Steps to download the install media

1. From your browser, navigate to the https://www.quest.com/products/metalogix-archive-manager-for-files page

   or

   navigate to the http://www.quest.com/trials page. Locate the product Metalogix Archive Manager for Files.
2. Click the **Download Free Trial** button.

3. Fill the *Download Your Free Trial* registration form and click **Download Trial**. The file download page appears.
4. Download the install media zip file.
5. The the trial license key is specified in the email that is sent to you.
6. Ensure that the files are available locally on the computer on which you are planning to install the Metalogix Archive Manager for Exchange components.

5

Express Installation

Express installation installs Metalogix Archive Manager for Files on a standalone server with the full set of primary components: Archive Manager for Files, Hierarchical Storage Manager (HSM) and ArchiveWeb. The server also contains the Archive Manager Database instance that contains the configuration databases for various features and components. If you do not have a dedicated file store, HSM uses the local hard drive for storing archived messages.

- Worksheet for this installation
- Steps to install Metalogix Archive Manager for Files
- Steps to verify the Express installation

Worksheet for this installation

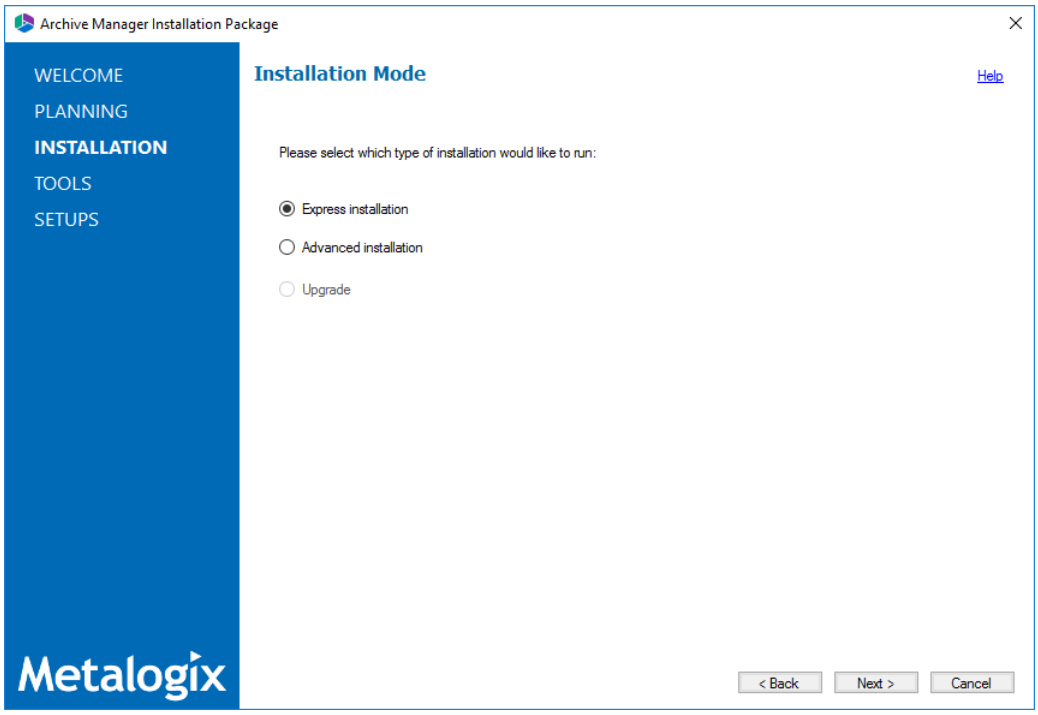
The following information will be required through the installation process. Sample values are provided here as a guidance.

Item	Description	Example
License Key	The license key that you received from Quest. If you don't have a license key, contact your Quest representative.	894K5-3M448-M544E-A594A-7K8Z7 (Sample only. This key is neither an active nor an expired license key)
Archive manager for Files server	The computer name where the Archive Manager for Files will be installed.	AMFSERVER
Installation folder	Full path of the folder where the application files will be installed.	C:\Program Files (x86) \Metalogix
HSM Store folder	Full path of the folder that will contain the archived files.	C:\HSM
Database Authentication method	Type of database authentication: *Integrated Windows Authentication* or *SQL Authentication.*	Integrated Windows Authentication

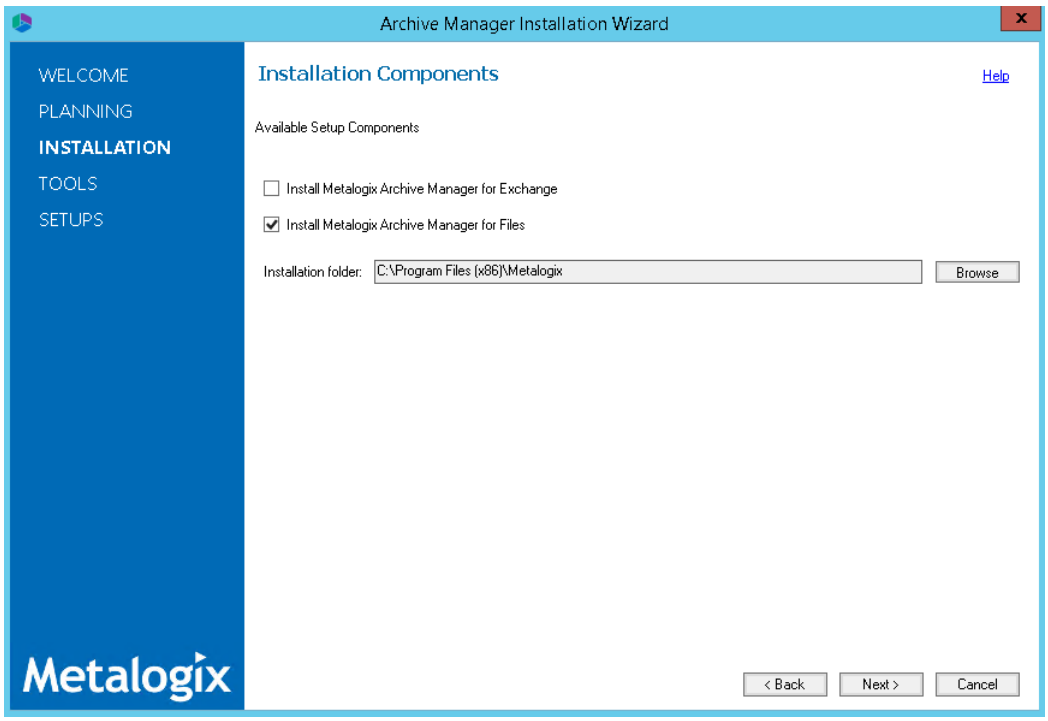
UserLogin	Username if *SQL Authentication* is selected.	democorp\domadmin
Password	Database password if *SQL Authentication* is selected.	**********
Database server	The database serve instance name where the databases for Archive Manager for Files will be installed.	AMFSERVER

Steps to install Metalogix Archive Manager for Files

1. Run the **Metalogix Archive Manager Installation Package** EXE file and extract the files to a folder.
2. If the installer does not start immediately, run the **MAMInstaller.exe** from your install media folder. The *Welcome* window opens.
3. From the navigation panel on the left, click **PLANNING**. The *Planning* window opens. Review the requirements and release notes. If necessary, visit the Quest website for more information.
4. From the navigation panel on the left, click **INSTALLATION**. The *Server Installation* window opens. Read the **Software Transaction Agreement**. If you wish to proceed, select the **I accept the terms of the license agreement** check box.
5. Click **Next**. The *Installation Mode* window opens.

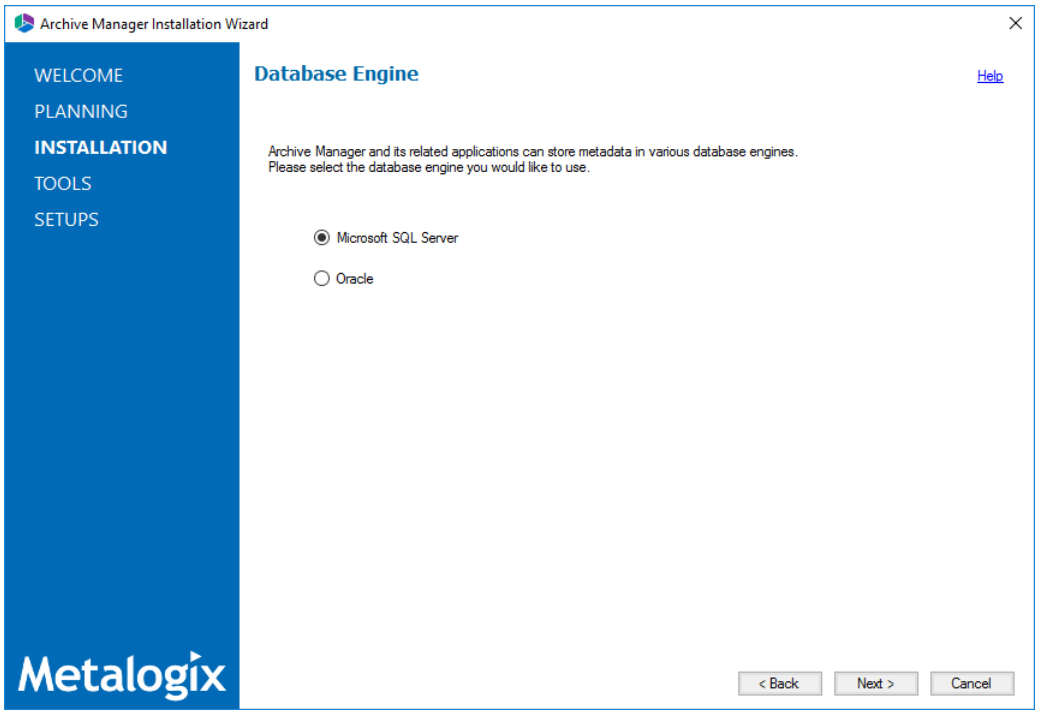


6. Select the **Express installation** option and click **Next**. The *Installation Components* window opens.



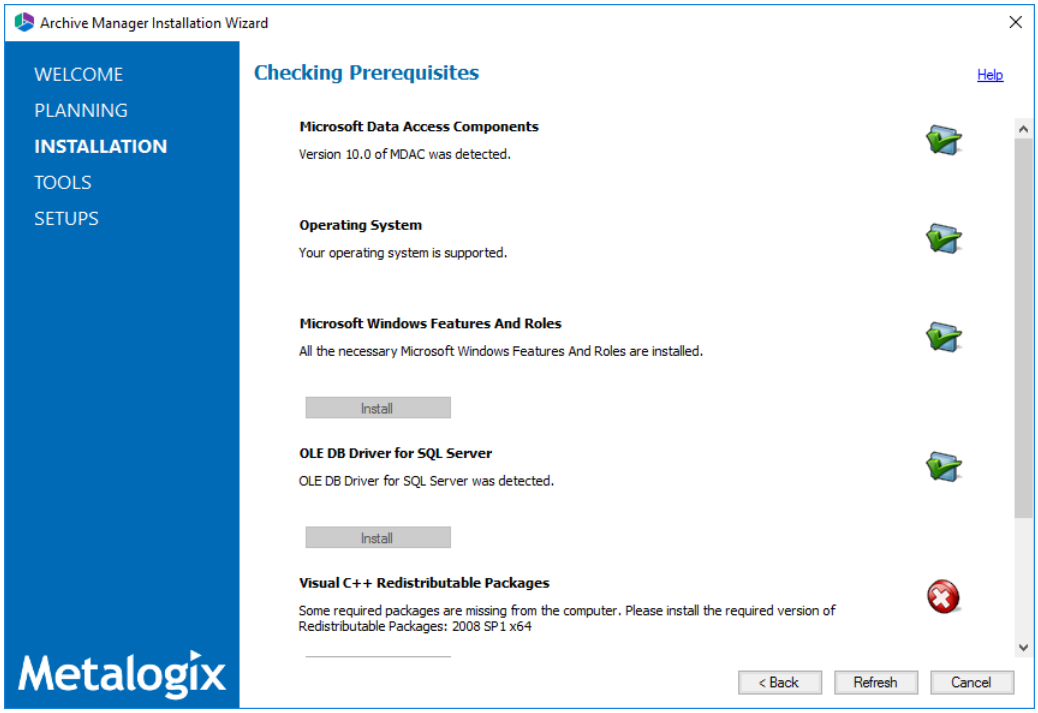
7. Select the **Install Metalogix Archive Manager for Files** check box. If you want to change the default installation folder, click **Browse** and select and existing folder.

8. Click **Next**. The *Database Engine* selection window opens.



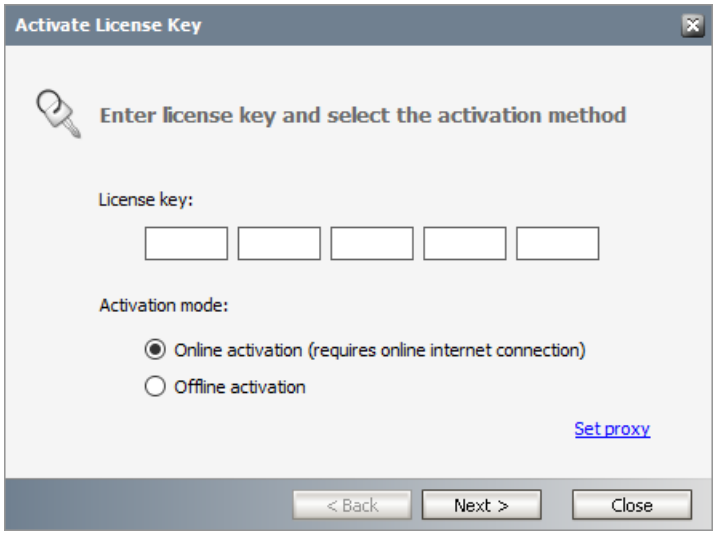
9. Select either **Microsoft SQL Server** (for on-premise MS SQL Database Server or Azure SQL Database) or **Oracle**.

10. Click **Next**. The *Checking Prerequisites* window opens.



11. Notice that some prerequisites are missing and the **Next** button is deactivated. Click **Install** for each prerequisite to install the missing components. Scroll down to expose and install all the prerequisites.

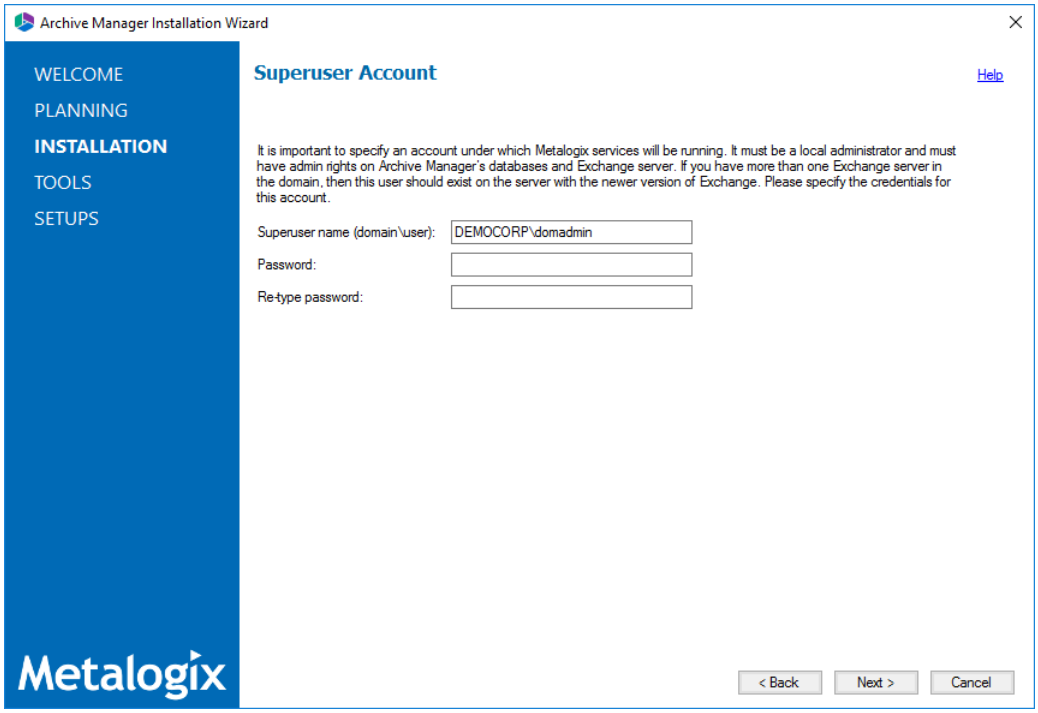
12. Scroll down to the bottom of the window. Click **Validate your license**. The *Activate License Key* dialog appears.



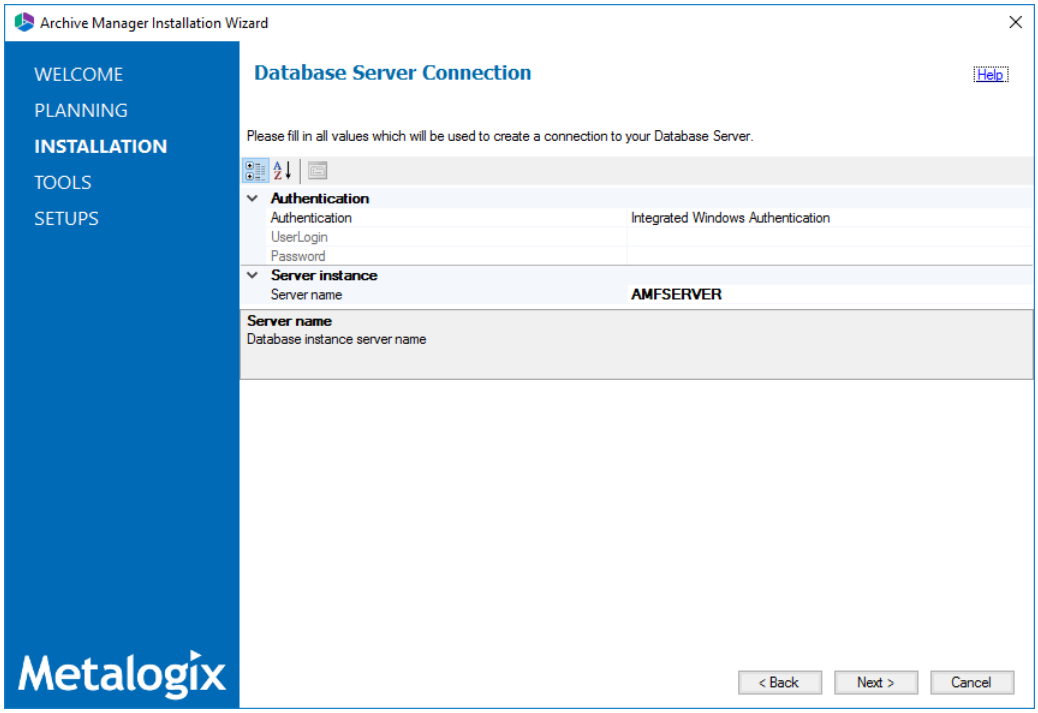
13. If you are connected to the internet, select **Online activation** or see Appendix for more license activation options. Click **Next**.

14. When your license is activated, you will see a confirmation message and the license details. Click **Finish** to close the **Activate License Key** dialog. This completes the prerequisite checks.

15. In the **Checking Prerequisites** window, click **Next**. The *Superuser Account* window opens.



16. Specify the **Superuser name** and **Password**. Enter the password again in the **Retype password** field.
17. Click **Next**. The *Database Server Connection* window opens.



Specify the connection properties as explained below:

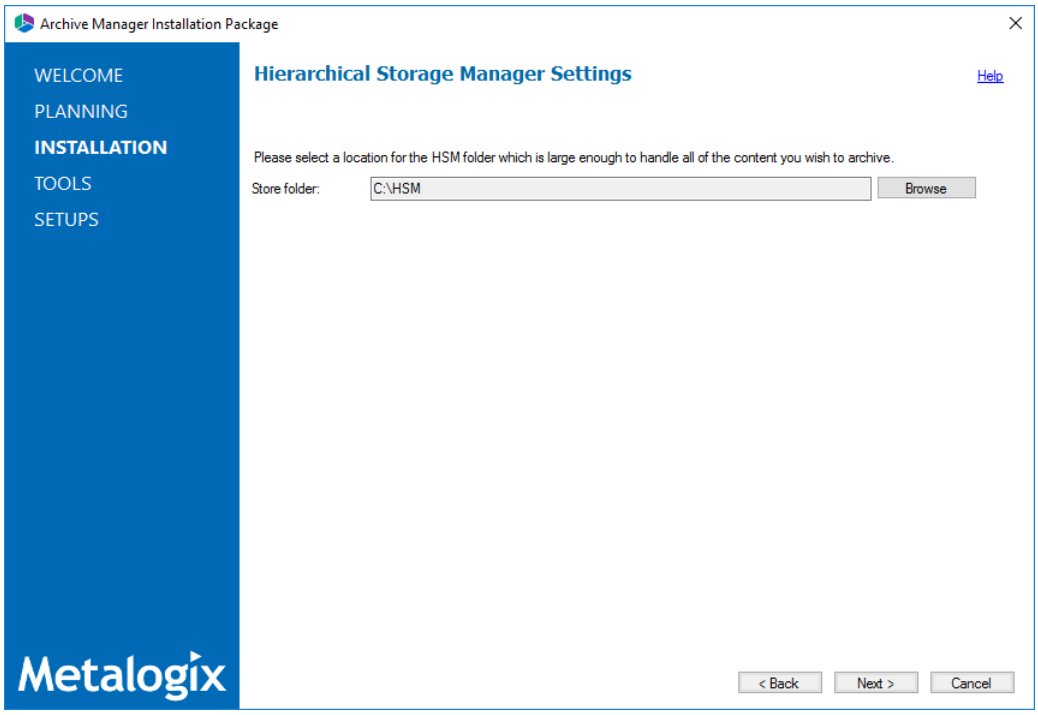
a. **Authentication** - the type of database authentication. From the drop down, select either **Integrated Windows Authentication** or **SQL Authentication**.

b. **Password** - password of the user (if SQL Authentication is selected)

c. **UserLogin** - user name (if SQL Authentication is selected)

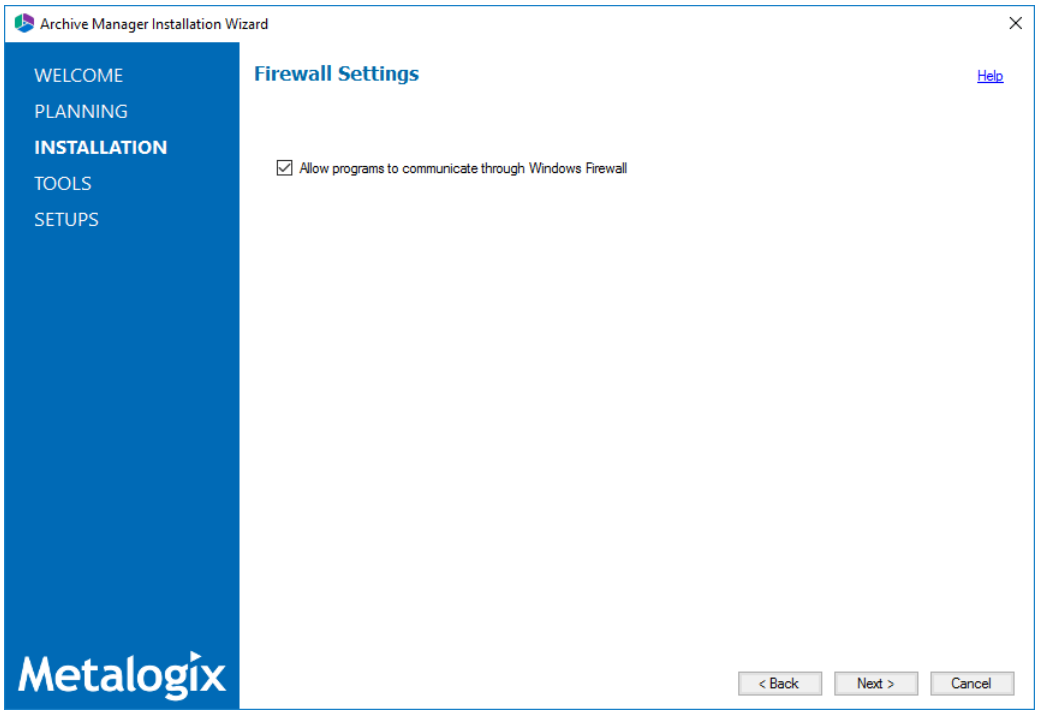
d. **Server name** - name of the SQL Server. For example **AMFSERVER**

18. Click **Next**. The *Hierarchical Storage Manager Settings* window opens.



19. If you want to change the default folder, click **Browse** and select a location that has ample space to store archived files.

20. Click **Next**. The *Firewall Settings* window opens.



21. Select the **Allow programs to communicate through Windows Firewall** check box. Metalogix Archive Manager for Exchange components will be then able to communicate through the firewall.

22. Click **Next**. The *Summary Installation* window opens. The installation summary displays settings you have specified in previous steps.

    Select the check box **Start Metalogix Archive Manager for Files** to open the Archive Manager for Files Administration Center (AMAC) when the installation completes.

23. Click **Install** to start the installation.

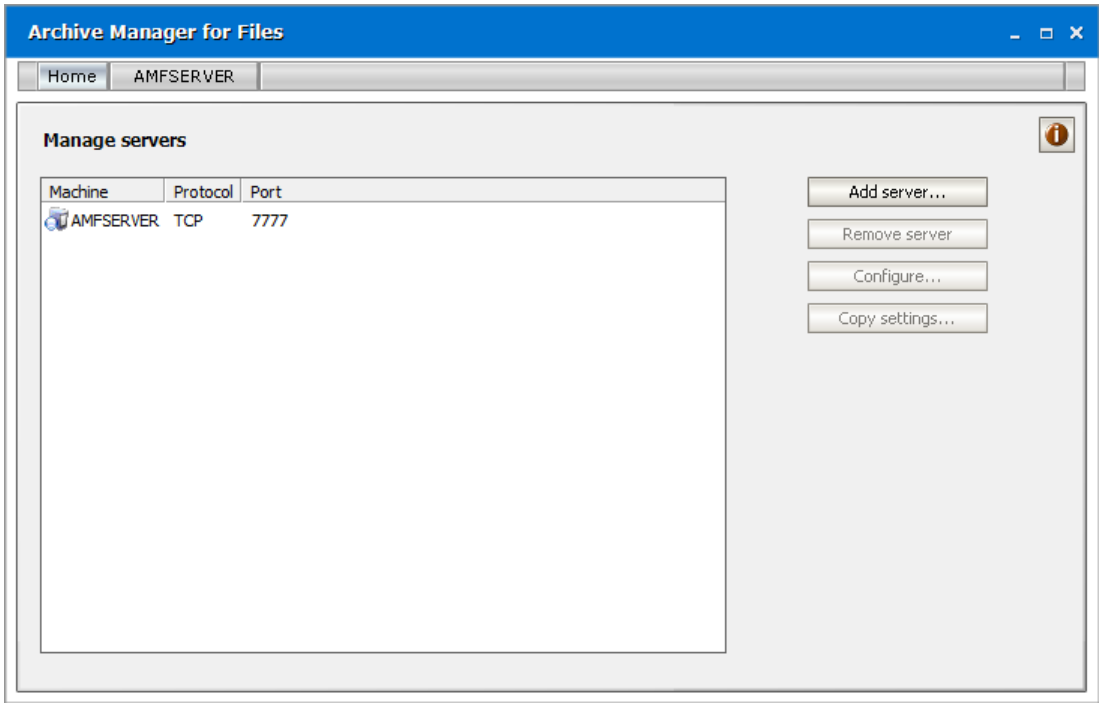
24. The installer proceeds to install all the components. If a component installer completes with a warning, expand the the row to view the warning(s).

25. Click **Finish** to complete the installation step.

Steps to verify the Express installation

The Archive Manager for Files Administration Center (AMAC) should open automatically if the check box **Start Metalogix Archive Manager for Files** was checked in the *Summary Installation* step of the installation wizard. To manually open the AMAC follow the steps described below:

1. Click **Ctrl + Esc** to display the list of windows programs.
2. Expand the *Metalogix* folder and click **Archive Manager for Files**.
3. The AMAC opens.


Archive Manager for Files
Home
AMFSERVER
Manage servers
Machine
Protocol
Port
AMFSERVER
TCP
7777
Add server...
Remove server
Configure...
Copy settings...

6

Maintenance

There are three maintenance options offered in the installer for each component.

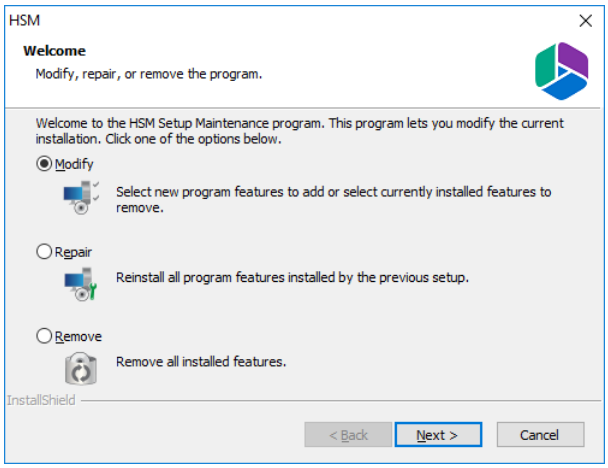
- **Modify** - helps you to change basic settings or constituent components.
- **Repair** - helps you to reinstall the component.
- **Remove** - helps you to uninstall the component.

The steps to modify the HSM component is described below as an example. All components use a similar maintenance wizard.

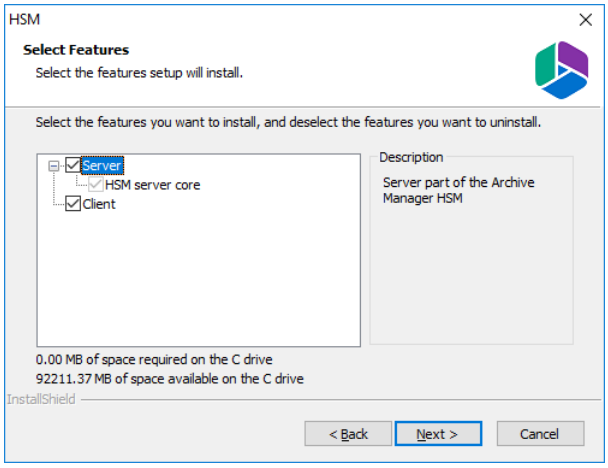
NOTE: For Express installations, it is recommended that you do not change any settings when you attempt to modify or repair a feature. If you intend to modify a feature, see the corresponding documentation which provides more information about the feature.

Steps to modify the HSM component

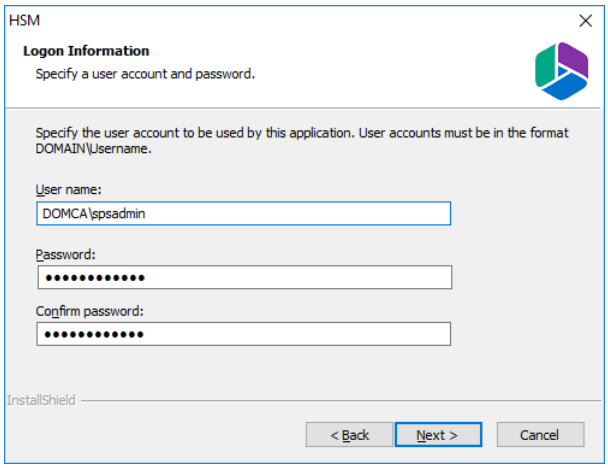
1. Double-click the installer for the HSM component (for example, `C:\Metalogix\Archive Manager Installation Package\HSM\HSM Setup.exe`). The **Welcome** window of the HSM maintenance wizard appears.



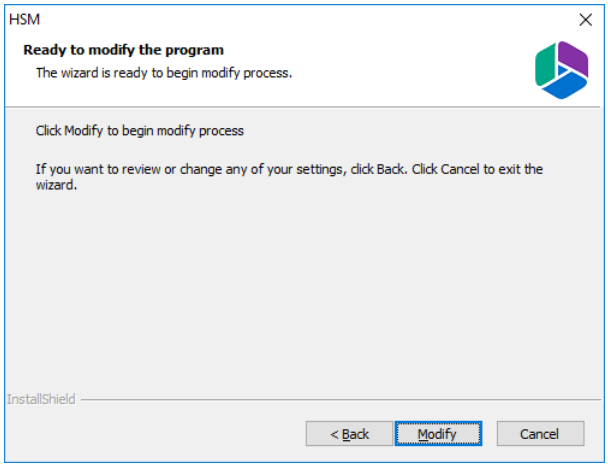
2. Choose **Modify** and click **Next**. The *Select features* window opens.



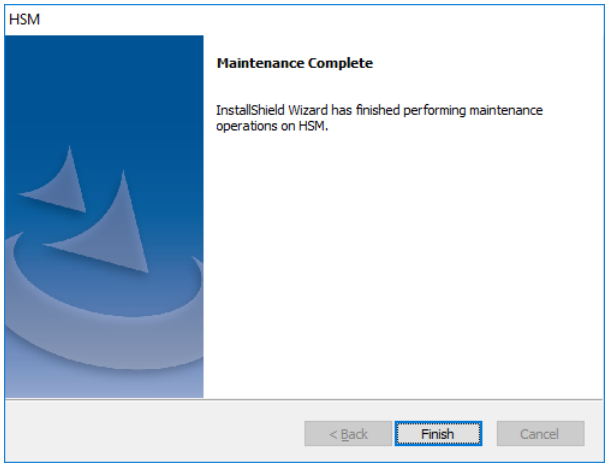
3. Click **Next**. The *Logon Information* window opens



4. Enter the credentials in the **Password** and **Confirm Password** fields. Click **Next**. The *Ready to modify the program* window opens.



5. Click **Modify** to update the feature. The *Maintenance Complete* window opens.



6. Click **Finish** to close the wizard and return to the upgrade wizard, or continue to upgrade other features.

NOTE: One or more services are stopped when modifications or repairs are performed. You must manually restart the services to ensure that all services have started.

Steps to restart services

1. Click Ctrl + Esc to display the list of windows programs.
2. Expand the Metalogix folder.
3. Depending on the product you have installed, click Start Exchange Services or Start File Services or both (if you have installed both products). Predefined batch commands will automatically start the services.

7

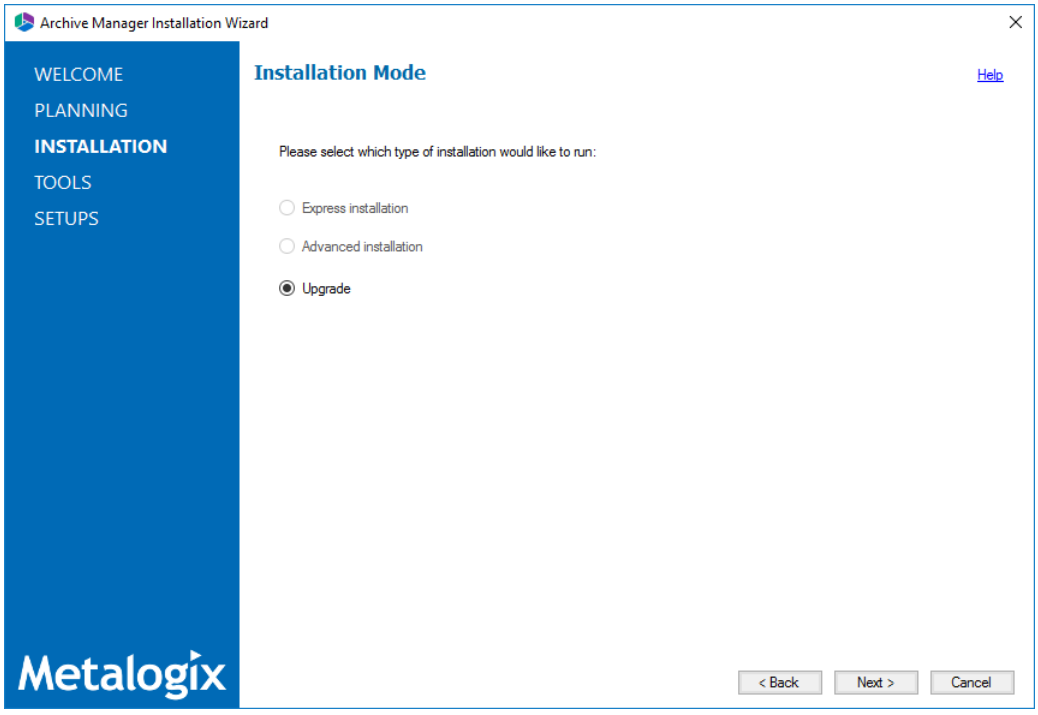
Upgrade

Upgrading Metalogix Archive Manager for Files implies that a previous version of Metalogix Archive Manager for Files is installed.

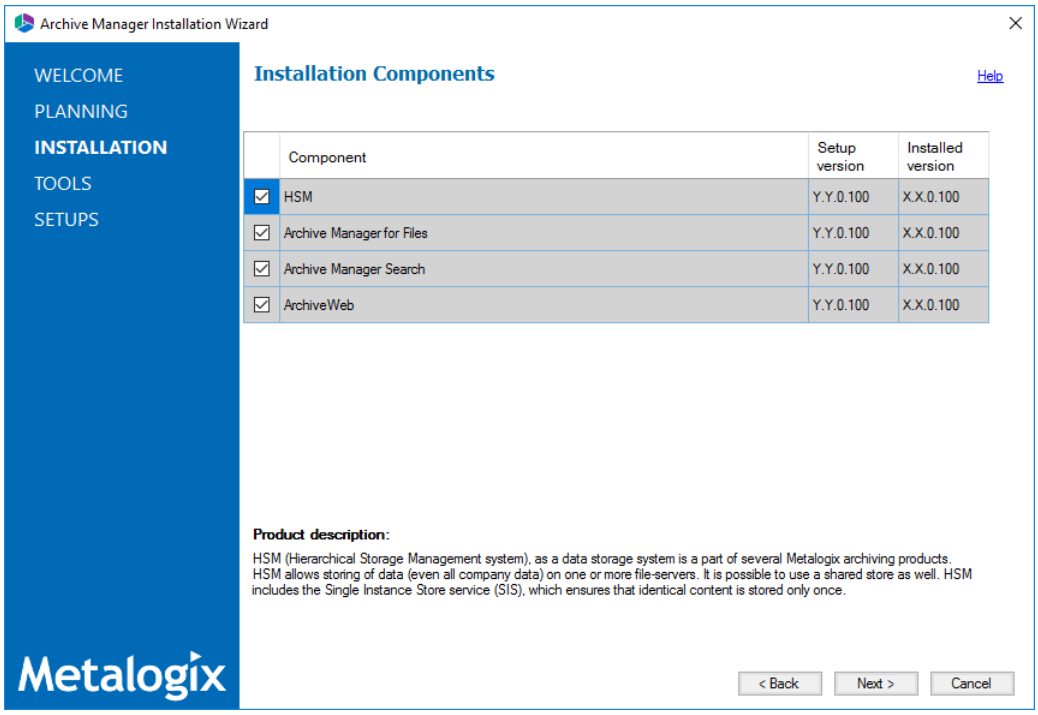
NOTE: Before you upgrade, we recommend you take a backup of the Archive Manager database..

Steps to upgrade Archive Manager

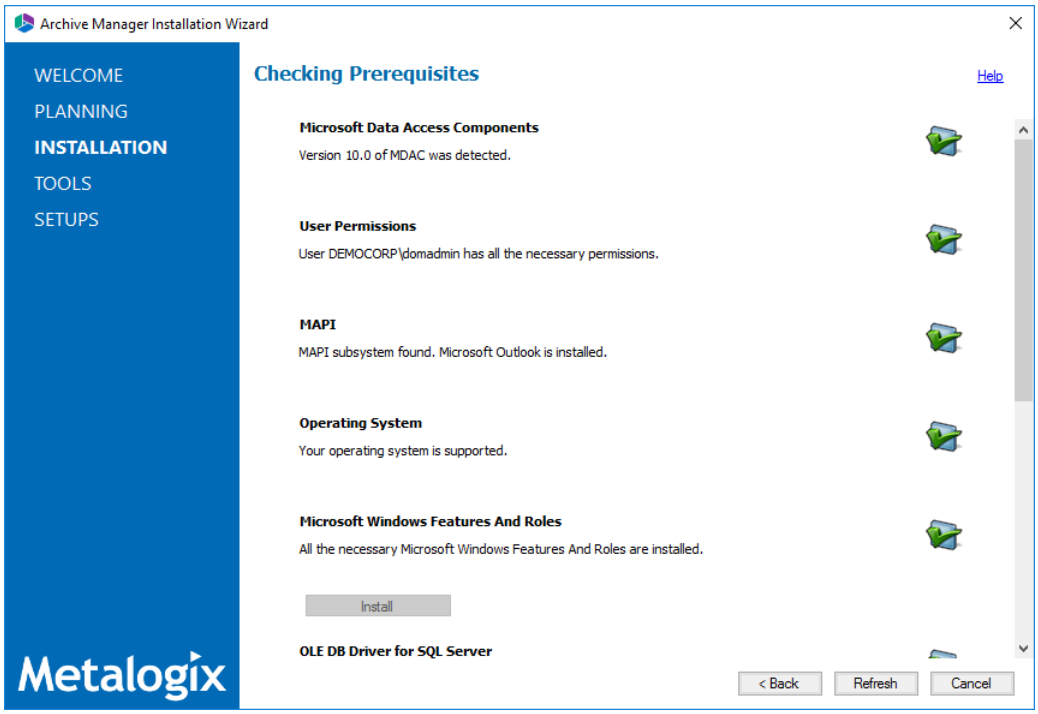
1. Download the latest Metalogix Archive Manager for Files install media. For instructions see Steps to download the install media.
2. Run the **Metalogix Archive Manager Installation Package**.
3. The wizard checks whether the Metalogix Archive Manager for Files installation requires an upgrade. If it does, the **Upgrade** option will be selected automatically.



4. Click **Next.** The **Installation Components** page appears with a list of components that are already installed on the server. You can select which components to upgrade.

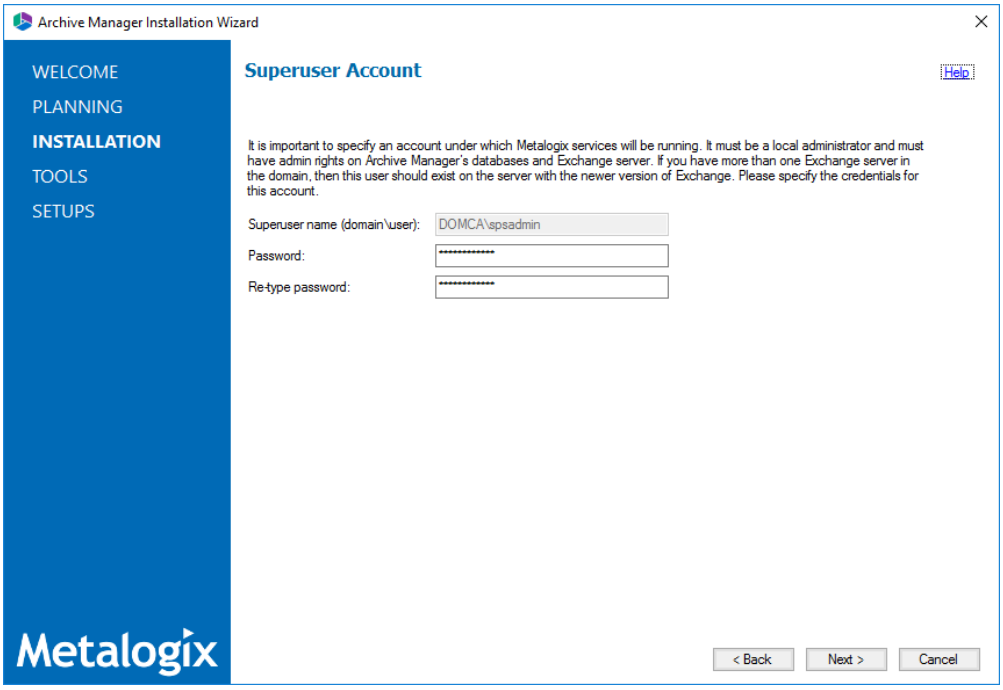


5. Click **Next.** The **Checking Prerequisites** page appears. A check is conducted to find out if a new prerequisite is needed for the upgrade.

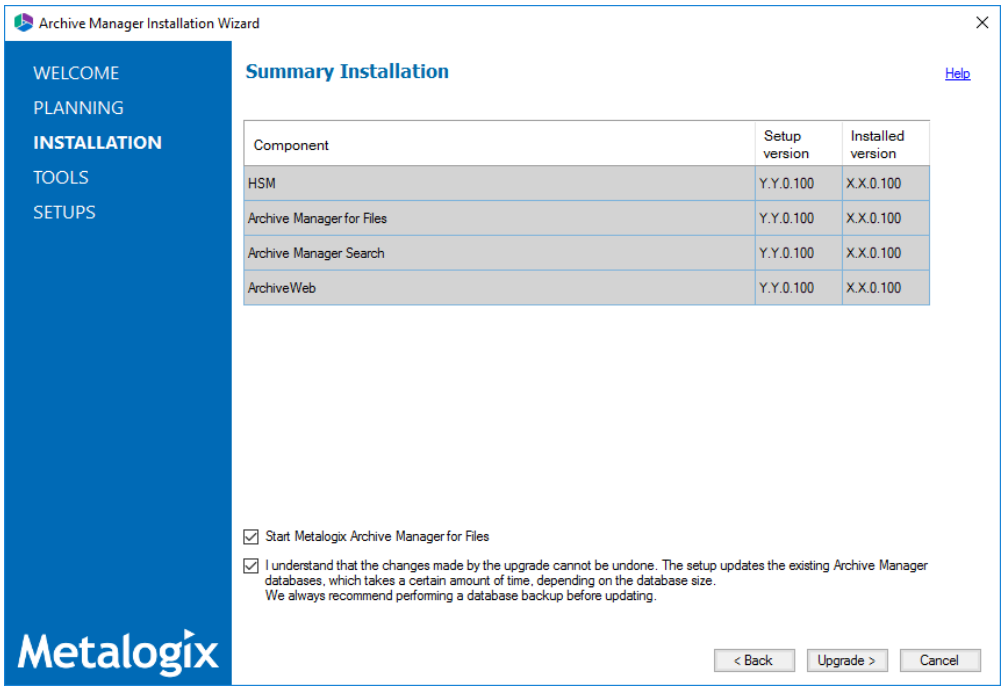


6. Click **Next.** The **Superuser Account** page appears. Specify and confirm the password.

> **NOTE:** The **Superuser name** cannot be changed.



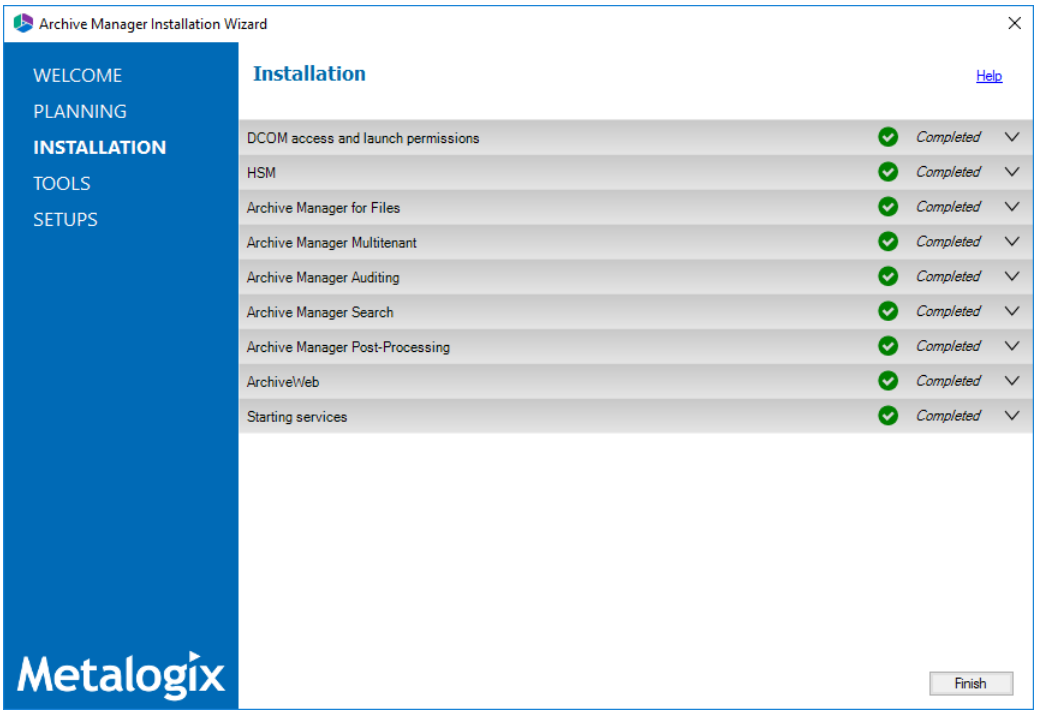
7. Click **Next.** The **Summary Installation** page appears. This page presents information about component versions that will be installed after the update (**Setup version** column), and versions that are currently installed (**Installed version** column).



a. Select the check box **Start Metalogix Archive Manager for Files** to open the Archive Manager for Files Administration Center (AMAC) when the upgrade completes.

b. Select the check box **I understand that...** to confirm that you have acknowledged the upgrade. The setup updates the Archive Manager database. If the check box is not selected, you cannot install the upgrade.

8. Click **Install** to start the upgrade. Click **Back** to return to the previous page or click **Cancel** to exit the upgrade wizard. If you click **Install**, the upgrade process starts. The upgrade progress for each component is displayed and the operation is confirmed.



9. Click **Finish** to close the wizard when all the components are upgraded.

8

Appendix

In this section:

- Steps to grant Remote Desktop Access
- Online license activation
- Offline license activation

Steps to grant Remote Desktop Access

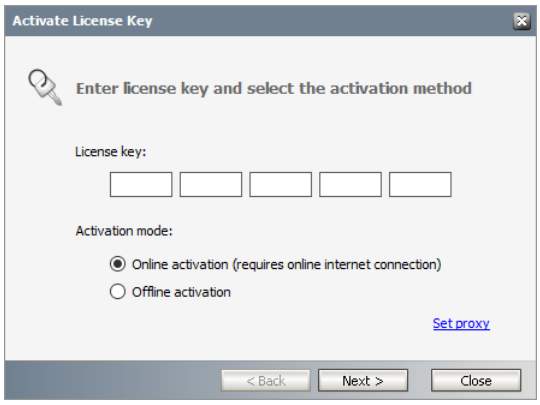
Follow the steps below to grant the required privilege to log on through Remote Desktop Services:

1. Log in to the server with the local administrator credentials.
2. Navigate to **Start** > **Run.** Enter **secpol.msc** and click **OK**.
3. From the *Security Settings* pane, navigate to **Local Policies** > **User Rights Assignment**.
4. From the right-hand pane, double-click on **Allow log on through Remote Desktop Services** to open the properties window.
5. Select the *Local Security Settings* tab and click **Add User or Group...**
6. Add the Enterprise Administrator account.
7. Click **OK** to save the changes and exit.

License Activation

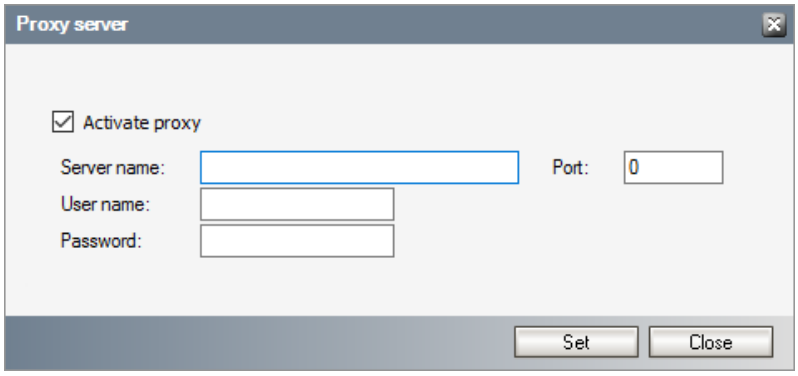
Online activation

1. In the *Activate License* window, enter the license key.



2. If you want to activate the license online, select **Online Activation** , and then click **Next**.

> **NOTE:** If your computer is behind a firewall, click the **Set Proxy** link. The *Proxy Setup* dialog appears.



   a. Select **Activate Proxy** and specify the proxy information as described below:

   b. **Server Name** - enter the name of your proxy server.

   c. **Port** - enter the port number of the proxy server.

   d. **User name** and **Password** - Specify the credentials of the user who is authorized to access the proxy server.

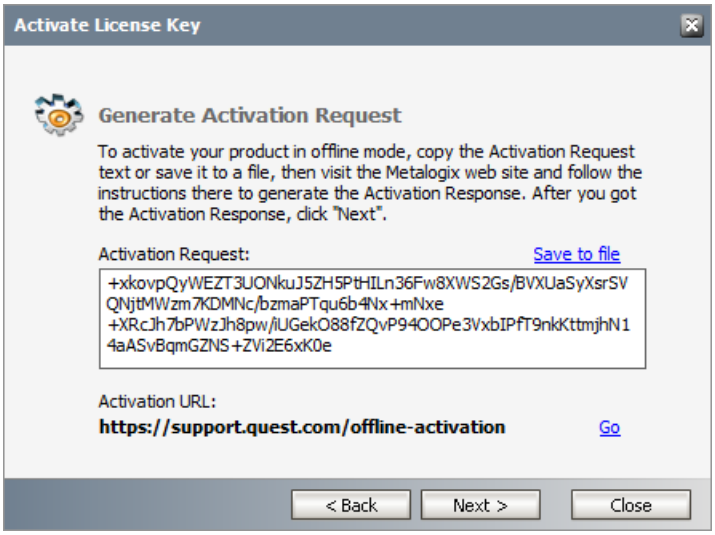
   e. Click **Set** to save the information, or click **Close** to return to the *License Key Information* dialog.

3. If the license key is validated successfully, the confirmation message appears along with the license details. Click **Finish** to close the dialog.

Offline activation

Offline activation is available for customers who want to review the information sent to Metalogix. You will require an internet connection for this option as well.

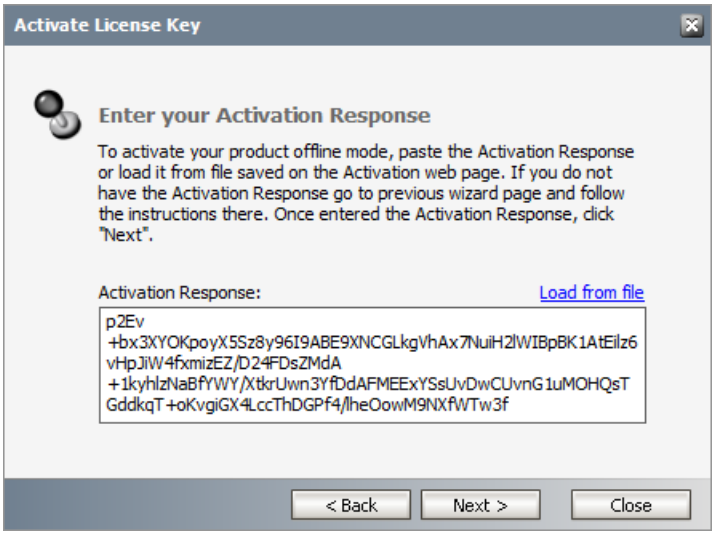
1. In the *Activate License* window, enter the license key.
2. select **Offline Activation**. The *License Key Information* window displays additional steps that are required.
3. **Step 1: Collect the activation data to the clipboard or to a file**
   a. Select from the two options described below:



   Option 1: Copy Activation Data to Clipboard. The activation data is saved to memory. Use this option if you plan to follow through with the subsequent steps immediately.

   Option 2: Click **Save to File**. The Windows File dialog appears. Specify a file name for the activation data file and click **Save** to save the file to a location of your choice. Use this option if you plan to activate the license at a later date.

4. **Step 2: Submit collected data**
   a. Click **Go**. The **Metalogix License Activation** web page appears.
   b. Follow the instructions to get the **Activation Key file** (with the file extension DAT) is made available for download. Save this file to a location of your choice.
5. **Step 3: Paste Activation Response**



a. Click **Load from File**. The Windows file dialog appears.

b. Locate the activation key file and click **Open**. The text appears in the **Activation Key File** field.

6. **Step 4: Activate offline**

   a. Click **Next** to complete the activation process.

7. If the license key is validated successfully, the confirmation message appears along with the license details. Click **Finish** to close the dialog.

9

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Quest creates software solutions that make the benefits of new technology real in an increasingly complex IT landscape. From database and systems management, to Active Directory and Office 365 management, and cyber security resilience, Quest helps customers solve their next IT challenge now. Around the globe, more than 130,000 companies and 95% of the Fortune 500 count on Quest to deliver proactive management and monitoring for the next enterprise initiative, find the next solution for complex Microsoft challenges and stay ahead of the next threat. Quest Software. Where next meets now. For more information, visit www.quest.com.

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Technical support is available to Quest customers with a valid maintenance contract and customers who have trial versions. You can access the Quest Support Portal at https://support.quest.com

The Support Portal provides self-help tools you can use to solve problems quickly and independently, 24 hours a day, 365 days a year. The Support Portal allows you to:

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- Sign up for product notifications
- Download software and technical documentation
- View how-to-videos
- Engage in community discussions
- Chat with support engineers online
- View services to assist you with your product