

Metalogix[®] Archive Manager for Files 8.3

Advanced Installation 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

Updated November 2020

Version 8.3

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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 enables 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.
- **ArchiveWeb** - online archive interface with advanced search and reporting functionality.

File storage and retrieval process

Archive Manager for Files transfers files to HSM which takes care of storing and retrieving the files. HSM works with a database because the information contained in the shortcut is stored either in an ORACLE, or MS SQL. The HSM system transfers this file to a specified store which compresses the file *on the fly*. A shortcut, which is only a few kilobytes in size, remains at the original file location. The 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 that a user notices is that the shortcut is bears a 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 enables version control, eliminates data duplication, and increases storage and retrieval efficiency. With version control enabled, 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.

System Requirements

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

i | **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

i | **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

i | **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 3.5
 - .NET Extensibility 4.5
 - ASP.NET 3.5
 - 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)

Redistributable packages

- Microsoft Visual C++ 2008 SP1 Redistributable Package (x64)
- Microsoft Visual C++ 2010 Redistributable Package (x64)
- Microsoft Visual C++ 2010 Redistributable Package (x86)
- Microsoft Visual C++ 2013 Redistributable Package (x64)
- Microsoft Visual C++ 2017 Redistributable Package (x64)
- Microsoft Visual C++ 2017 Redistributable Package (x86)

Database Servers and Drivers

- Microsoft SQL Server 2012 to Microsoft SQL Server 2019
 - Microsoft OLE DB Driver 18 for SQL Server, or newer
- 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 Internet Explorer 10 or higher
- Microsoft Edge
- Mozilla Firefox 16 or higher
- Chrome 33 or higher
- Opera 12 or higher

File Systems (Sources)

- Windows Server 2012
- Windows Server 2012 R2
- Windows Server 2016
- Windows Server 2019
- 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.
- It is possible to install Archive Manager for Files on servers without IIS. However, this disables the creation of HTML shortcuts and VNX archiving and prevents the use of MS Search as the full-text search engine.

For HSM Server

If the HSM component is installed on a dedicated server, the following additional information should be considered:

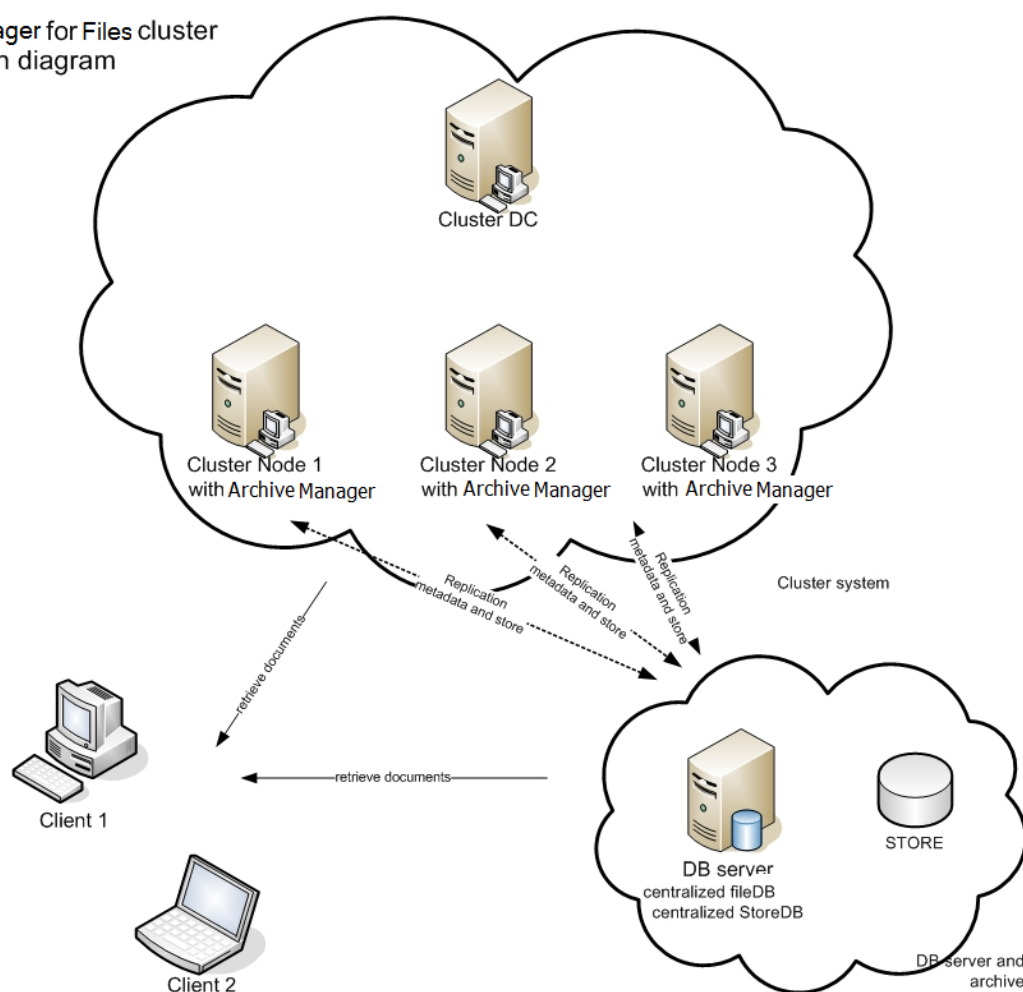
- .NET Framework 3.5 – if not available, setup will continue but the following store types will not be functional in connection with the HSM system: Amazon S3, Windows Azure, Caringo CASTor, EMC Atmos, FileNet IS, Hitachi HCAP, Nirvanix, Rackspace, Simple Foldering Store, XAM
- .Net Framework 4.5 – if not available, Google Drive store will not be functional.
- Microsoft Web Service Enhancements (WSE) 3.0 - if not available, the iTernity store cannot be created.

Deployment Plan

If Archive Manager for Files is to be installed on a cluster, it has to be installed on all nodes of the cluster regardless Active/Active or Active/Passive cluster environment. All installations have to be configured to use the same archive (store) and the same database. (See the following picture.)

NOTE: When updating Archive Manager for Files installed on a cluster, it has to be updated on all cluster nodes.

Archive Manager for Files cluster configuration diagram



Installation steps:

1. Create a common Archive Manager database.
2. Create a common archive (store) to be used (in our case it is HSM).
3. Install Archive Manager for Files on all cluster nodes.

4. Configure all installations to use the same archive and database (see the next section of the manual).

About User Accounts

Before you begin installing Metalogix Archive Manager for Files, you must identify or setup three types of user accounts to ensure a successful installation and usage experience of the Metalogix Archive Manager for Files.

Administrator - Domain user account that has administrator access to the various servers and is used to install the application features.

Database user account - For Oracle database authentication or SQL Server authentication on Microsoft SQL Server. Does not have to be a domain user account but this user account needs elevated privileges to setup and access the databases. You don't have to setup this account if you plan to use Windows authentication with a Microsoft SQL Server.

Considerations for the database user

Metalogix Archive Manager for Files supports either the Microsoft SQL Server or the Oracle database. The database user considerations for each database is also dependent on the authentication mode as described below.

For SQL Server

Windows Authentication

The domain user that is selected must be added to the database with the *sysadmin* role. This user will be automatically assigned the *dbo* user account by SQL Server. You can then use *dbo* as the username for database connection credentials which is preferred.

i | **NOTE:** For Windows authentication, we recommend the *superuser* account be added to the database with the *sysadmin* role. Descriptions in this guide use **dbo** as a sample login and assumes it is the *superuser* account.

When a user connects through a Windows user account, SQL Server validates the account name and password using the Windows principal token in the operating system. This means that the user identity is confirmed by Windows. SQL Server does not ask for the password, and does not perform the identity validation. Windows Authentication is more secure than SQL Server Authentication.

SQL Server Authentication

You must create a database user in SQL Server to access the database with the *sysadmin* role.

When using SQL Server Authentication, logins are created in SQL Server that are not based on Windows user accounts. Both the user name and the password are created by using SQL Server and stored in SQL Server. When using SQL Server Authentication, you must set strong passwords for all SQL Server accounts.

For Oracle

Metalogix Archive Manager for Files does not support Windows Authentication for Oracle database servers. You can use the credentials of any existing user with the *sysdba* role or create a database user with the *sysdba* role.

Advanced Installation

Advanced installation uses the *installation wizard* to install Metalogix Archive Manager for Files and associated features on dedicated servers as described in the [Deployment Plan](#)^[10]. The *installation wizard* guides you through the installation of each feature on the various servers. In addition to the installation of the features, the installer wizard also helps you to verify, install and set up the prerequisites and accounts that you would have to do manually to prepare the environments for the installations.

i **NOTE:** Some organizations prefer a more granular control on the installation process. You can choose to install all the features manually. For more information about the manual installation process, see the chapter [Manual Installation](#)^[32].

In this chapter:

- [Prepare the Application Servers](#)^[14]
 - [Steps to download the install media](#)^[16]
 - [Steps to install the prerequisites](#)^[15]
- [Install the Application Features](#)^[16]
 - [Install HSM and Archive Manager Search](#)^[17]
 - [Install Archive Manager for Files](#)^[31]

For next steps after you complete the advanced installation, see Application Configuration.

Prepare the Application Servers

For the Archive Manager Database server (AMFDB)

See the [System Requirements](#)^[6] and [About User Accounts](#)^[12] chapters for preparing database servers.

For the HSM and Search server (AMFHSM)

- [Steps to install the prerequisites](#)^[15]
- [Steps to download the install media](#)^[16]

For the Archive server (AMFSERVER)

- [Steps to install the prerequisites](#)^[15]
- [Steps to download the install media](#)^[16]

Steps to install the prerequisites

These steps are optional and are included if you want to install them yourself. The installer verifies prerequisites.

1. Log in with the credentials of the local administrator.
2. Open PowerShell as an Administrator.
3. To install the recommended windows roles and features for individual components that may be distributed across other servers run the following PowerShell commands:

Archive Manager for Files

```
Install-WindowsFeature -Name Web-Server, Web-Http-Redirect, Web-Dyn-Compression, Web-Windows-Auth, Web-Basic-Auth, Web-Metabase, Web-Mgmt-Service, NET-Framework-45-Features, NET-Framework-45-ASPNET, Web-Net-Ext45, Web-Asp-Net45, NET-WCF-Services45, Web-Asp-Net
```

HSM

```
Install-WindowsFeature -Name Web-Server, NET-Framework-Features
```

Search

```
Install-WindowsFeature -Name NET-Framework-Features
```

i | **NOTE:** These PowerShell commands are compatible with a Window 2016 operating system. Please refer to the [System Requirements](#)^[6] chapter to modify the script for other supported Windows operating systems or install them manually.

4. Install the database drivers. For Microsoft SQL Server, the database driver is available in the folder <installation folder>\Archive Manager Installation Package\Install.
5. Install the redistributable packages required for your operating system. These files are available in the folder <installation folder>\Archive Manager Installation Package\Install.

Steps to download the install media

1. Login to the server with the credentials of the Administrator account (eg. **democorp\domadmin**)
2. 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.
3. Click the **Download Free Trial** button.
4. Fill the *Download Your Free Trial* registration form and click **Download Trial**. The file download page appears.
5. Download the install media zip file.
6. The trial license key is specified in the email that is sent to you.
7. Ensure that the files are available locally on the computer on which you are planning to install the Metalogix Archive Manager for Files features.

Install the Application Features

For the HSM and Search server (AMFHSM)

The installations steps described in this topic includes the the installation of the *Archive Manager Post-processing* feature.

[Install HSM and Archive Manager Search](#)^[17]

For the Archive Manager for Files server (AMFSERVER)

The installations steps described in this topic includes the the installation of all sub-features.

[Install the Archive Manager for Files server](#)^[31]

Install HSM and Archive Manager Search

In this topic:

- [Worksheet for this installation](#) ¹⁷
- [Steps to install HSM and Archive Manager Search](#) ¹⁸
- [Steps to verify the installation](#)

Worksheet for this installation

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

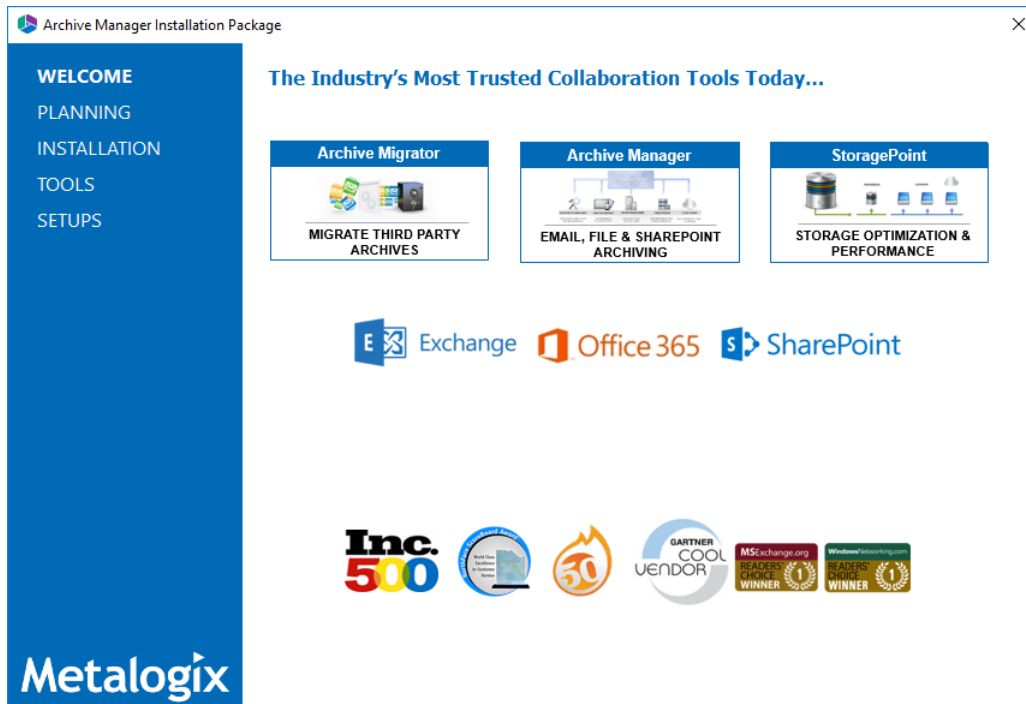
Item	Description	Example
HSM server	The server where the HSM and Archive Manager Search will be installed.	AMFHSM
Administrator	Windows account that is used to install the application. This is usually the enterprise administrator.	username: democorp\domadmin password: *****
Media Folder	Full path of the folder where the media files are extracted	C:\Metalogix
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 The local hard drive folder is used as the default media store. Use of other media storage systems are described in the <i>Media Store Administration Guide</i> .
Store name	Name of the media store on a hard drive. With the <i>Advanced Installation</i> option of the installer wizard, only a local hard drive can be setup as a media store.	FilesStore

Schema name	Name of a schema in a hard drive media store.	FilesSchema
Database Authentication method	Type of database authentication: <i>Integrated Windows Authentication</i> or <i>SQL Authentication</i>	Integrated Windows Authentication
UserLogin	Username if <i>SQL Authentication</i> is selected	dbadmin
Password	Database password if <i>SQL Authentication</i> is selected	*****
Database server	The database server instance name where the databases for Archive Manager for Files will be installed.	AMFDB

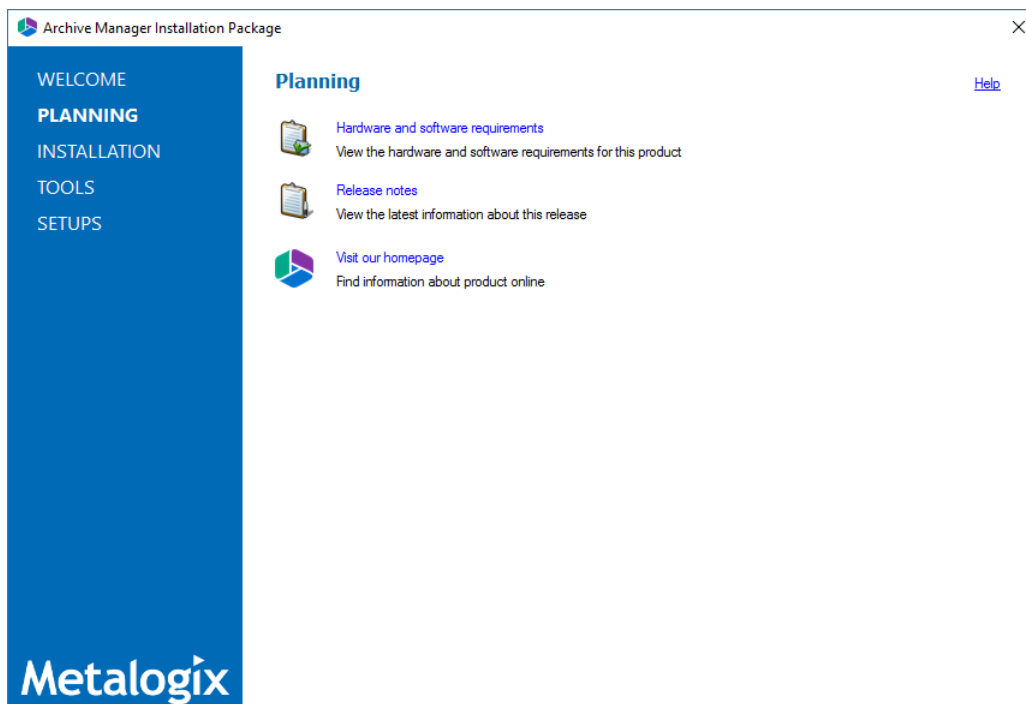
Steps to install HSM and Archive Manager Search

1. Log in to the server with the credentials of the Administrator account (eg. **democorp\domadmin**).
2. Run the **Metalogix Archive Manager Installation Package** to extract the files to a local folder.

3. If the installer does not start immediately, run the **MAMInstaller.exe** from your install media folder. The *Welcome* window opens.

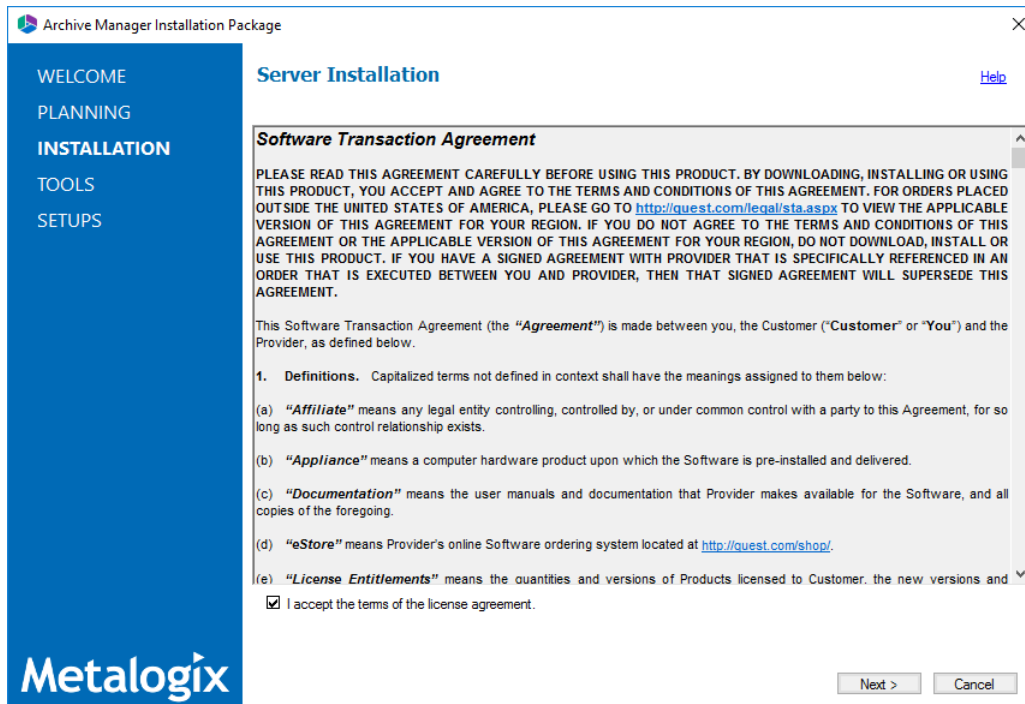


4. From the navigation panel on the left, click **PLANNING**. The *Planning* window opens.



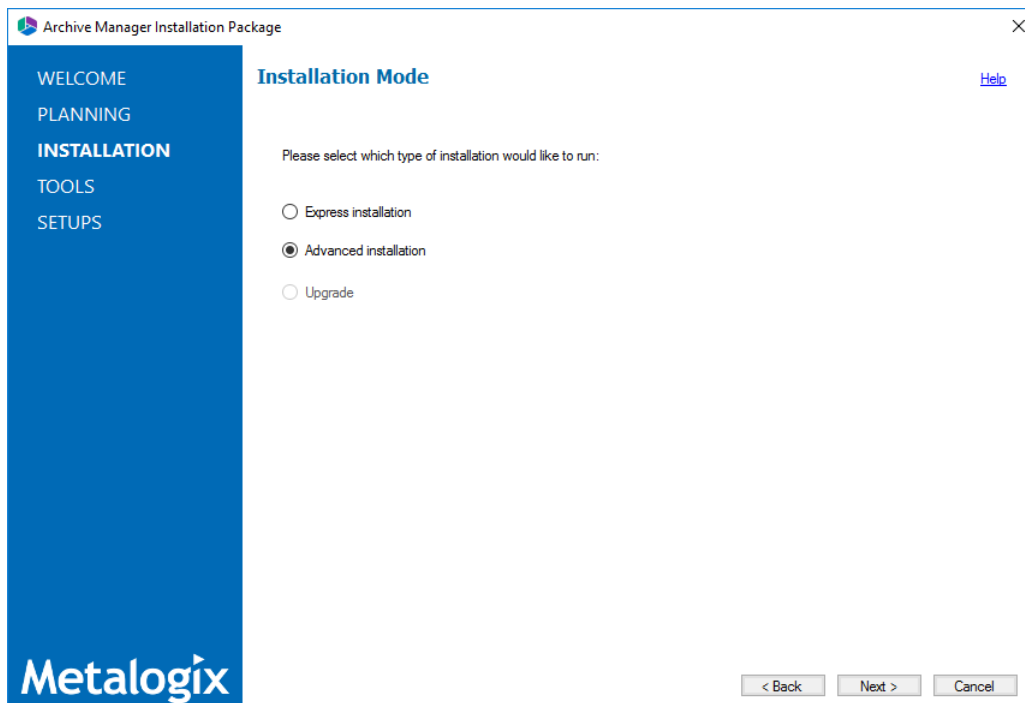
Review the requirements and release notes. If necessary, visit the Quest website for more information.

5. 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.

6. Click **Next**. The *Installation Mode* window opens. Select the **Advanced installation** option.



7. Click **Next**. The *Installation Components* window opens.

The screenshot shows the 'Installation Components' window of the Archive Manager Installation Wizard. On the left is a blue sidebar with navigation links: WELCOME, PLANNING, **INSTALLATION**, TOOLS, and SETUPS. The main area has a title bar with the Metalogix logo and a 'Help' link. Below the title bar is a table with columns: Component, Setup version, and Installed version. The table lists five components: HSM (checked), Archive Manager for Files (unchecked), Archive Manager for Exchange (unchecked), Archive Manager Search (checked), and ArchiveWeb (unchecked). Below the table is a 'Product description' section explaining that Archive Manager Search ensures fast and effective searching through documents of various formats. At the bottom, there is an 'Installation folder' field with the path 'C:\Program Files (x86)\Metalogix' and a 'Browse' button. At the very bottom are three buttons: '< Back', 'Next >', and 'Cancel'.

Component	Setup version	Installed version
<input checked="" type="checkbox"/> HSM	8.3.0.198	
<input type="checkbox"/> Archive Manager for Files	8.3.0.198	
<input type="checkbox"/> Archive Manager for Exchange	8.3.0.198	
<input checked="" type="checkbox"/> Archive Manager Search	8.3.0.198	
<input type="checkbox"/> ArchiveWeb	8.3.0.98	

Product description:
Archive Manager Search ensures fast and effective searching through documents of various formats. This is achieved by indexing the content of documents.

Installation folder:

Select **HSM** and **Archive Manager Search**.

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

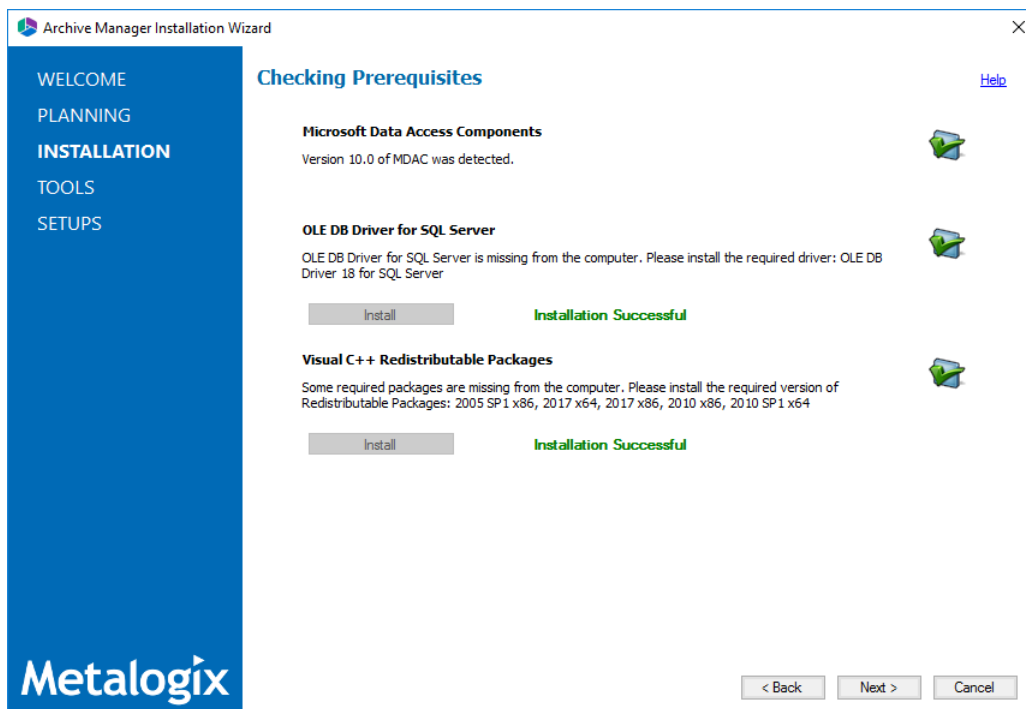
The screenshot shows the 'Database Engine' window of the Archive Manager Installation Wizard. It has the same blue sidebar and title bar as the previous window. The main area contains a description: 'Archive Manager and its related applications can store metadata in various database engines. Please select the database engine you would like to use.' Below this are three radio button options: 'Microsoft SQL Server' (selected), 'Azure SQL Server', and 'Oracle'. At the bottom are three buttons: '< Back', 'Next >', and 'Cancel'.

Archive Manager and its related applications can store metadata in various database engines. Please select the database engine you would like to use.

☒ Microsoft SQL Server
☐ Azure SQL Server
☐ Oracle

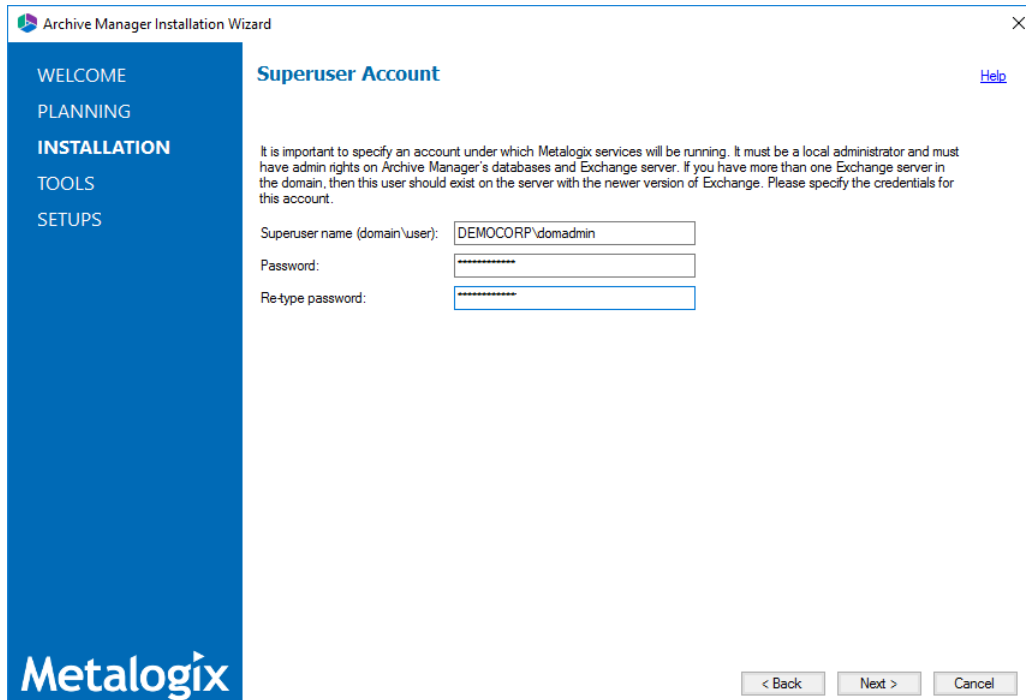
Select either **Microsoft SQL Server** or **Oracle**.

9. Click **Next**. The *Checking Prerequisites* window opens with database-specific prerequisites.



If one or more prerequisites are missing, the **Next** button is disabled. Click **Install** to install each prerequisite.

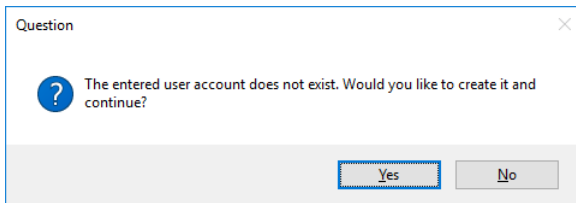
10. Click **Next**. The *Superuser Account* window opens.



Specify the **Superuser name** and **Password**. Enter the password again in the **Re-type password** field.

If the superuser does not exist, the wizard will request permission to create the superuser account in the Active Directory and grant the necessary permissions on this server to work

with the installed features. If the superuser exists, the dialog shown below does not appear. If the permissions dialog appears, click **Yes**.



11. Click **Next**. The *Database Server Connection* window opens.

12. From the *Component* column, select **HSM**.

Component	DB Server
HSM	MSSQL
Archive Manager Search	MSSQL
Archive Manager Post-Processing	MSSQL

Authentication	
Authentication	Integrated Windows Authentication
UserLogin	
Password	

Server instance	
TableOwner	dbo
ServerName	AMFDB
DatabaseName	MAMHSM
Provider	MSOLEDBSQL

ServerName
Database instance server name

i **NOTE:** If you selected Oracle as your database engine, then the the *Database Server Connection* window for Oracle opens.

Enter the database parameter values described below:

For Microsoft SQL Server

- Authentication** - database authentication method.
- UserLogin** - Username if **SQL Authentication** or **Oracle client** is selected. Otherwise this field is disabled.
- Password** - Database password if **SQL Authentication** or **Oracle client** is selected. Otherwise this field is disabled.
- TableOwner** - Username of the installer account without the domain prefix. For example **dbo**.
- ServerName** - The name of the server where you are installing the HSM and Archive Manager Search.

- f. **DatabaseName** - The name of the database that will contain the HSM metadata. The default name is **MAMHSM**.
- g. **Provider** - The SQL Server database communication library. The choices for the provider are:

For SQL Server

- **MSOLEDBSQL** - Microsoft OLE DB Driver for SQL Server recommended by Microsoft. This is the default provider.
- **SQLLEDB** - Microsoft OLE DB Driver for SQL Server for backward compatibility.
- **SQLNCLI** - SQL Server Native Client OLE DB provider for backward compatibility.
- **SQLNCLI10** - SQL Server Native Client OLE DB provider for backward compatibility.
- **SQLNCLI11** - SQL Server Native Client OLE DB provider for backward compatibility.

For Oracle

- a. **Oracle net name** - net service name that describes the network address of the database server in your `tnsnames.ora` file.
- b. **Schema** - name of the Oracle schema from your `tnsnames.ora` file.
- c. **User name** - database login user name.
- d. **Password** - password of the database user.
- e. **Provider** - The Oracle database communication library (eg. OraOLEDB Oracle).
13. From the *Component* column, select **Archive Manager Search** and verify the database parameter values.
14. From the *Component* column, select **Archive Manager Post-Processing** and verify the database parameter values.

i | **NOTE:** When you specify the HSM database parameter values, they are carried over to the database specification for each feature in the list. While the features will be installed on the same server, the database to host the metadata for each feature can be on a different server and the database specifications section for each feature can be customized accordingly.

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

The screenshot shows the 'Hierarchical Storage Manager Settings' window of the Archive Manager Installation Wizard. On the left is a blue sidebar with navigation links: WELCOME, PLANNING, **INSTALLATION**, TOOLS, and SETUPS. The main area has a title bar with 'Archive Manager Installation Wizard' and a close button. Below the title is a 'Help' link. A descriptive paragraph states: 'The Hierarchical Storage Manager (HSM) stores the archived content of files. The HSM also manages the Single Instance Function so that identical files are stored only once no matter how many times they occur in the file system.' Below this is the 'Local HSM installation' section with the following fields: 'HSM server' (AMXHSM), 'Store name' (FileStore), 'Schema name' (FileSchema), and 'Store folder' (C:\HSM) with a 'Browse' button. A note says: 'Please select a location for the HSM folder which is large enough to handle all of the content you wish to archive.' At the bottom are '< Back', 'Next >', and 'Cancel' buttons. The Metalogix logo is in the bottom left corner.

16. Specify the parameter values as described below:

- a. **Store name** - Name of the media store. The default value is **FileStore**.
- b. **Schema name** - name of a schema in the media store. The default value is **FileSchema**.

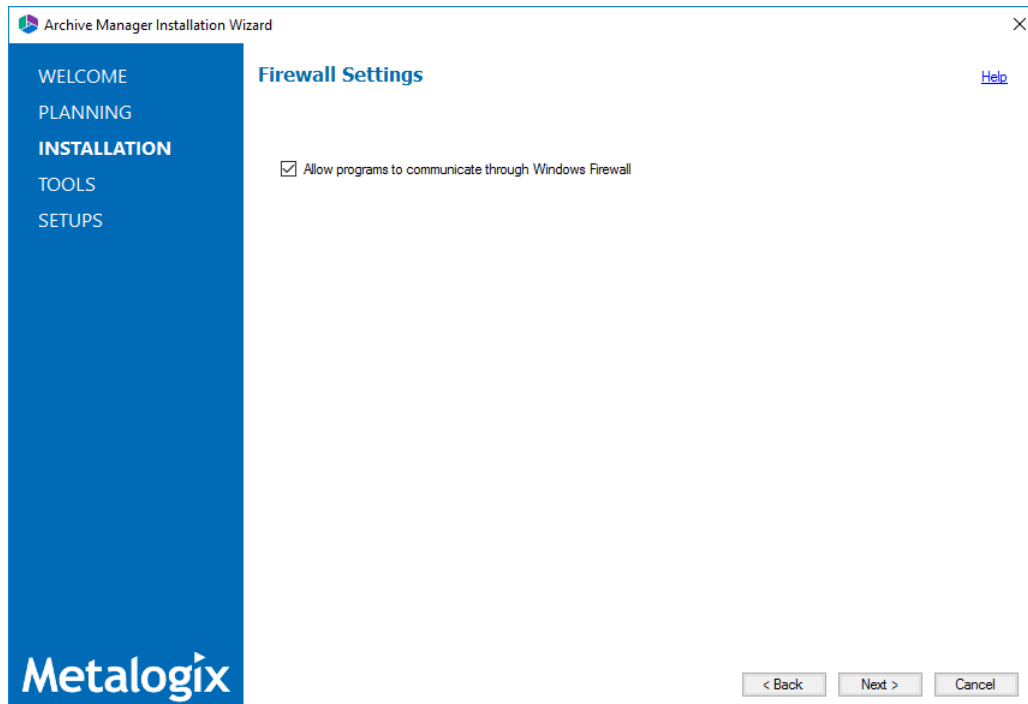
17. Click **Next**. The *Please select the type of installation* window opens.

The screenshot shows the 'Archive Manager Search Settings' window of the Archive Manager Installation Wizard. It has the same blue sidebar as the previous window. The main area has a title bar with 'Archive Manager Installation Wizard' and a close button. Below the title is a 'Help' link. The 'Search server' field is set to 'AMFHSM'. Below it is the 'Search index folder' section with a note: 'To keep the default folder click Next. To specify a different folder click Browse.' There are two rows of fields: 'For emails' and 'For files', both with default paths (C:\Program Files (x86)\Metalogix\MAMSearch\Index\Mail and C:\Program Files (x86)\Metalogix\MAMSearch\Index\File respectively) and 'Browse' buttons. At the bottom are '< Back', 'Next >', and 'Cancel' buttons. The Metalogix logo is in the bottom left corner.

Specify the parameter values as described below:

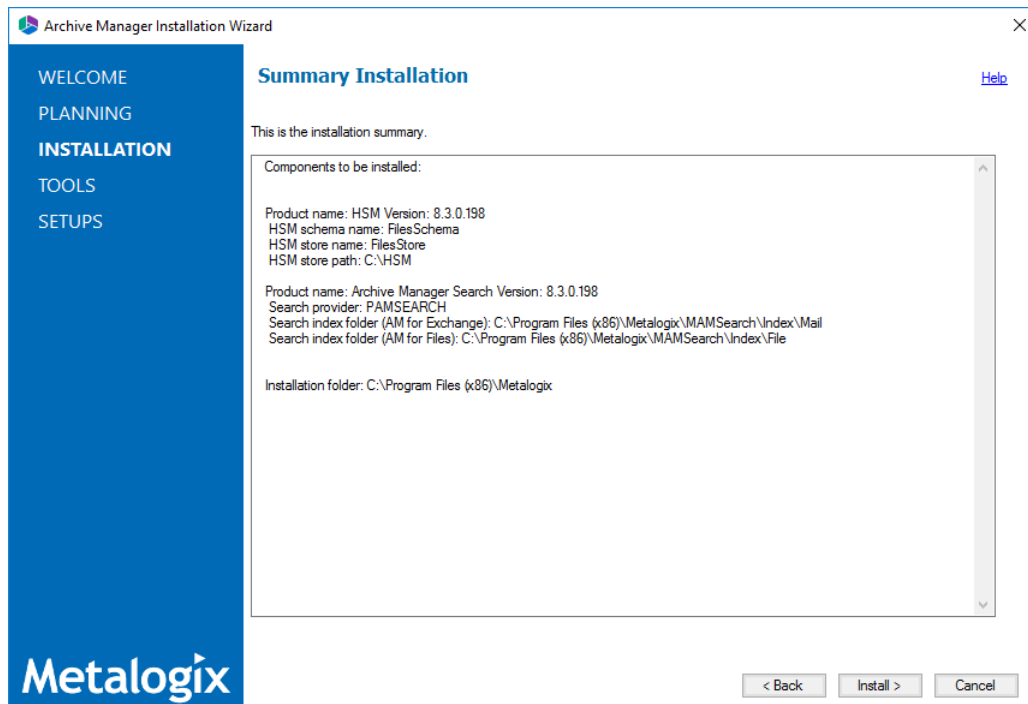
- a. **Search server** - name of the server where the Archive Manager Search feature is installed.
For example **AMFHSM**.

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



Select the **Allow installation package to change the firewall settings** check box. Metalogix Archive Manager for Files features will be then able to communicate through the firewall.

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



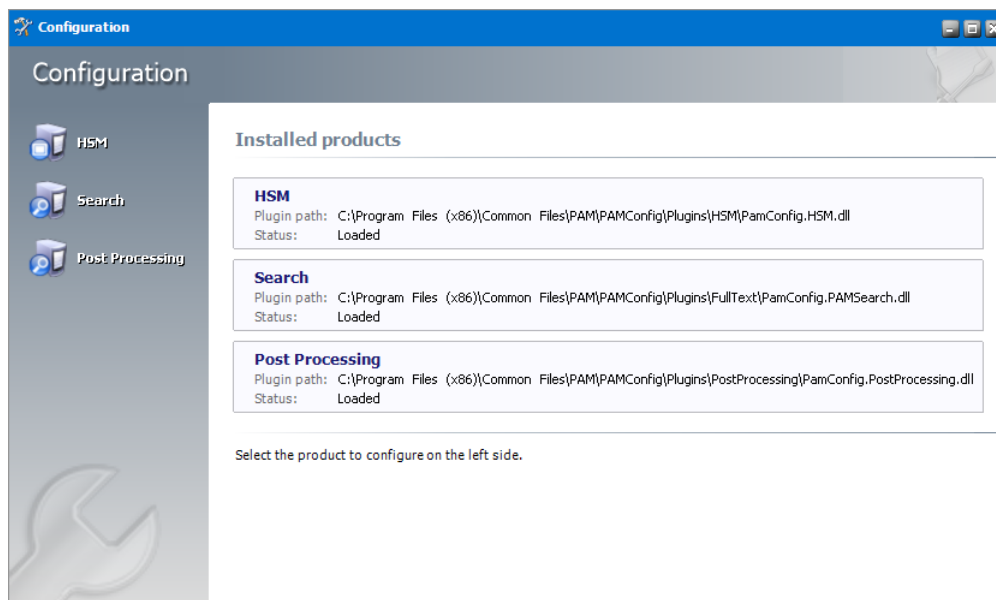
20. Click **Install** to start the installation.



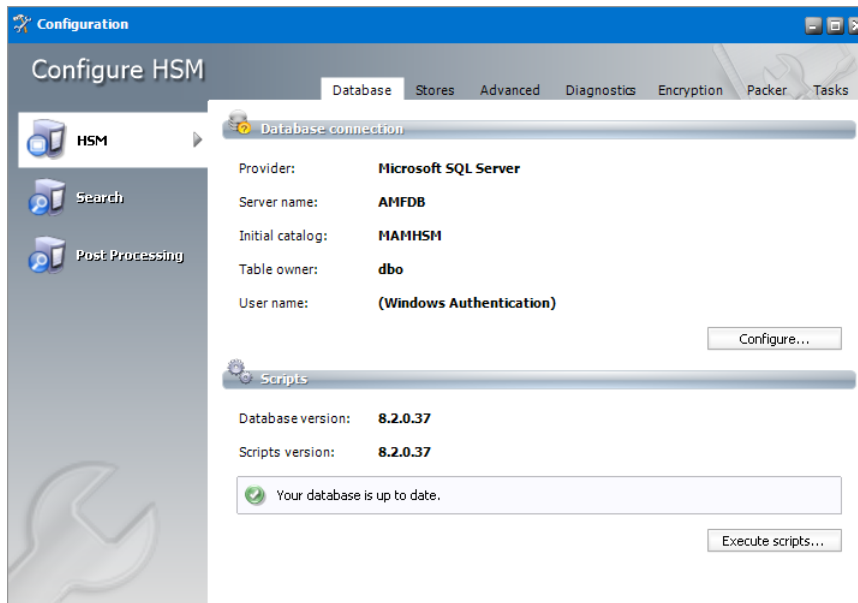
21. The installer proceeds to install all the features. If a feature installation fails or completes with a warning, expand the row to view and address the problem.
22. Click **Finish** to complete the installation step.

Steps to verify the installation

1. Open **Start > Metalogix > Archive Manager Configuration**. The *Configuration* wizard opens.

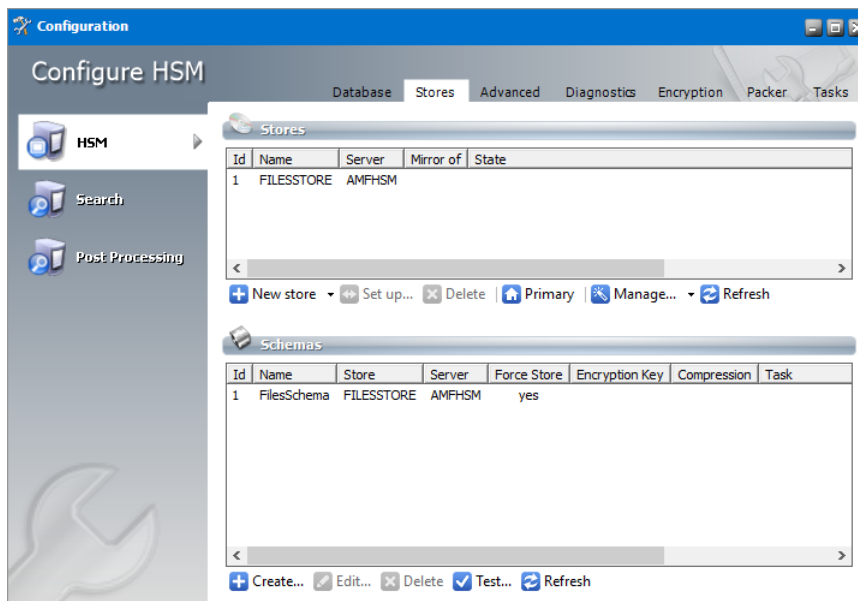


2. From the navigation panel, click **HSM**. The *Configure HSM* window opens and the **Database** tab is displayed by default.



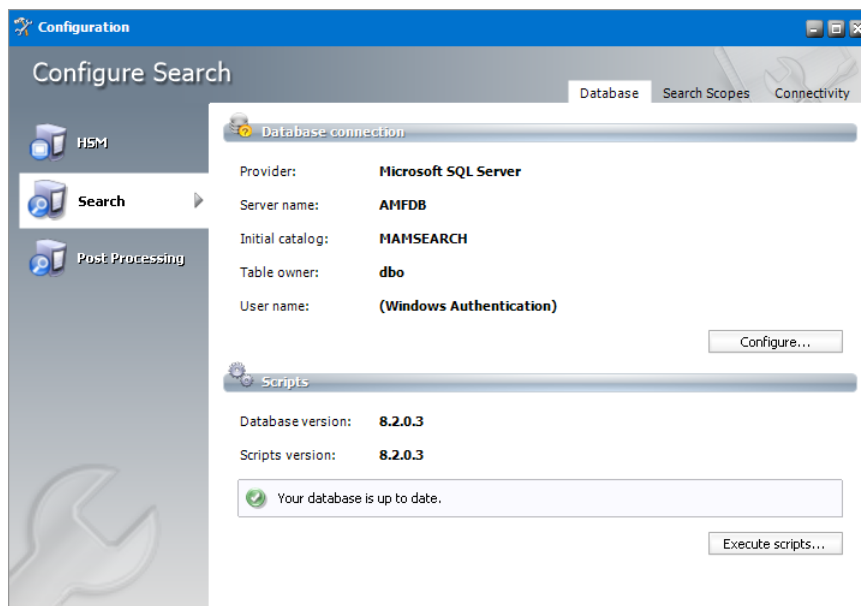
Verify that the values are as expected.

3. Click the **Stores** tab to display information about the media store.



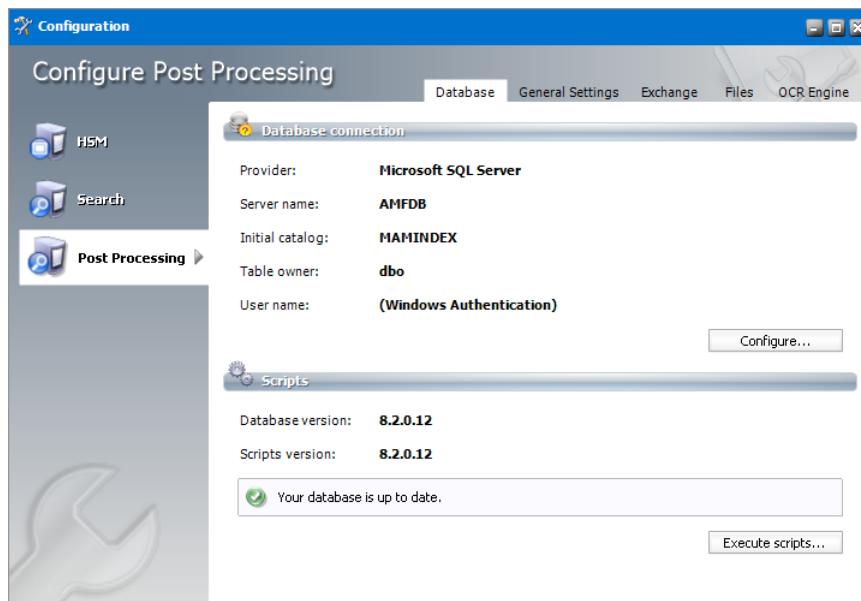
Verify that the values in the *Stores* and *Schemas* sections are as expected.

4. From the navigation panel, click **Search**. The *Configure Search* window opens.



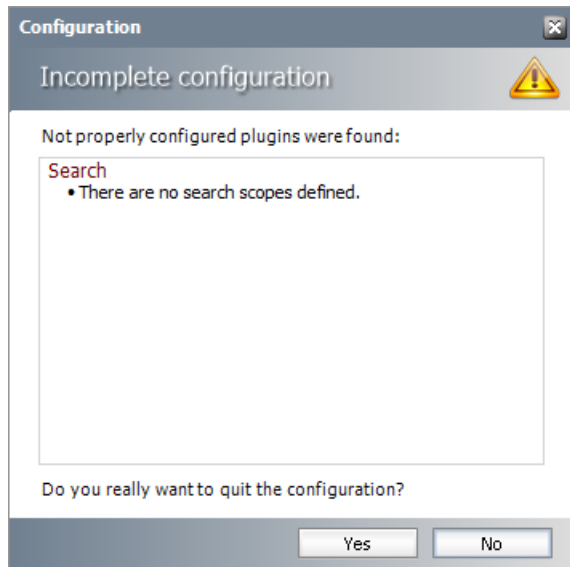
Verify that the values are as expected.

5. From the navigation panel, click **Post-Processing**. The *Configure Search* window opens.



Verify that the values are as expected.

6. Close the *Configuration* wizard. If the *Incomplete configuration* dialog opens, click **Yes** to dismiss the window and close the wizard.



Install Archive Manager for Files

Enter topic text here.

Manual Installation

Enter topic text here.

Prepare the Application Servers

In this topic:

For the Archive Manager Database server (AMFDB)

See the [System Requirements](#)^[6] and [About User Accounts](#)^[12] chapters for preparing database servers.

For the HSM and Search server (AMFHSM)

- [Steps to download the install media](#)^[33]
- [Steps to install the prerequisites](#)^[32]

For the Archive server (AMFSERVER)

- [Steps to download the install media](#)^[33]
- [Steps to install the prerequisites](#)^[32]

i **TIP:** We recommend completing all these tasks on each server using the Administrator account.

Steps to install the prerequisites

These steps are optional and are included if you want to install them yourself. The installer verifies prerequisites.

1. Log in with the credentials of the local administrator.
2. Open PowerShell as an Administrator.
3. To install the recommended windows roles and features for individual components that may be distributed across other servers run the following PowerShell commands:

Archive Manager for Files

```
Install-WindowsFeature -Name Web-Server, Web-Http-Redirect, Web-Dyn-Compression, Web-Windows-Auth, Web-Basic-Auth, Web-Metabase, Web-Mgmt-Service, NET-Framework-45-Features, NET-Framework-45-ASPNET, Web-Net-Ext45, Web-Asp-Net45, NET-WCF-Services45, Web-Asp-Net
```

HSM

```
Install-WindowsFeature -Name Web-Server, NET-Framework-Features
```

Search

```
Install-WindowsFeature -Name NET-Framework-Features
```

i **NOTE:** These PowerShell commands are compatible with a Windows 2016 operating system. Please refer to the [System Requirements](#)^[6] chapter to modify the script for other supported Windows operating systems or install them manually.

4. Install the database drivers. For Microsoft SQL Server, the database driver is available in the folder `<installation folder>\Archive Manager Installation Package\Install.`
5. Install the redistributable packages required for your operating system. These files are available in the folder `<installation folder>\Archive Manager Installation Package\Install.`

Steps to download the install media

1. Login to the server with the credentials of the Administrator account (eg. **democorp\domadmin**)
2. 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.
3. Click the **Download Free Trial** button.
4. Fill the *Download Your Free Trial* registration form and click **Download Trial**. The file download page appears.
5. Download the install media zip file.
6. The trial license key is specified in the email that is sent to you.
7. Ensure that the files are available locally on the computer on which you are planning to install the Metalogix Archive Manager for Files features.

Install the Application Features

For the HSM and Search server (AMFHSM)

The installation steps described in this topic include the installation of the *Archive Manager Post-processing* feature.

[Install HSM and Archive Manager Search](#)^[34]





For the Archive Manager for Files server (AMFSERVER)

The installations steps described in this topic includes the the installation of all sub-features.

[Install the Archive Manager for Files server](#) 

Install HSM

In this topic:

- [Worksheet for this installation](#) 
- [Steps to install HSM](#) 
- [Steps to configure the HSM database connection](#) 
- [Steps to install the HSM database](#) 
- [Steps to configure the HSM stores and schemas](#)

Worksheet for this installation

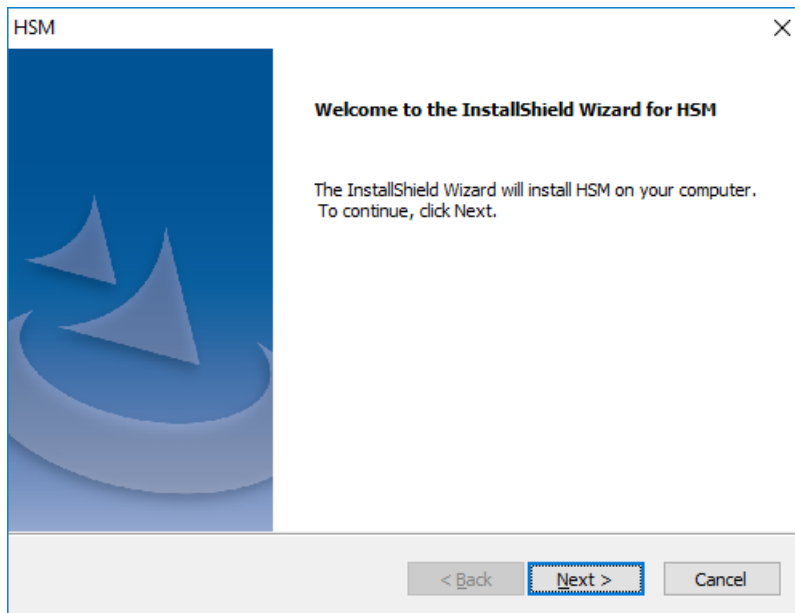
The following information will be required through the installation process. Sample values are provided here as a guidance.

Item	Description	Example
HSM server	The server where the HSM and Archive Manager Search will be installed.	AMFHSM
Administrator	Windows account that is used to install the application and run the Archive Manager for Exchange services.	username: democorp\domadmin password: *****
Media folder	Full path of the folder where the media files are extracted	C:\Metalogix
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 The local hard drive folder is used as the default media store. Use of other media storage systems are described in the

		<i>Media Store Administration Guide.</i>
Store name	Name of the media store on a hard drive. With the <i>Advanced Installation</i> option of the installer wizard, only a local hard drive can be setup as a media store.	FILESTORE
Schema name	Name of a schema in a hard drive media store.	FILESHEMA
Database Authentication method	Type of database authentication: <i>Integrated Windows Authentication</i> or <i>SQL Authentication</i>	Integrated Windows Authentication
UserLogin	Username if <i>SQL Authentication</i> is selected	dbadmin
Password	Database password if <i>SQL Authentication</i> is selected	*****
Database server	The database server instance name where the databases for Archive Manager for Files will be installed.	AMFDB

Steps to install the application

1. Log in to the server (eg. **AMFHSM**) with the Administrator credential (eg. **democorp\domadmin**)
2. Download the installation media. For more information see [Steps to download the install media](#) ³³.
3. Run the **Metalogix Archive Manager Installation Package** to extract the files to a local folder.
4. Close the integrated installer wizard which starts automatically.
5. Run the HSM setup from <Media folder>\Archive Manager Installation Package\HSM\HSM Setup.exe
6. A prerequisite check occurs and missing requirements if any are displayed. Click **Install** to ensure all missing requirements are installed.
7. The *Welcome* window of the HSM installer opens.

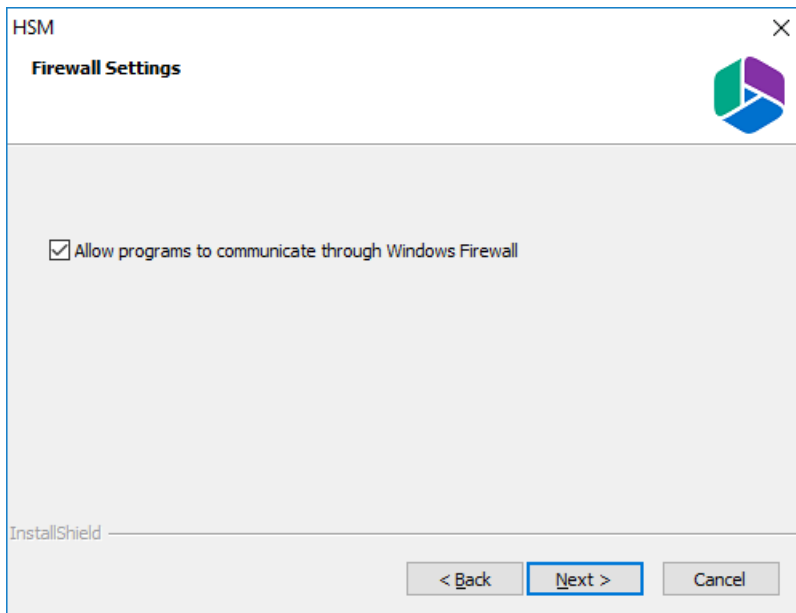


8. Click **Next**. The *Logon Information* window opens.

The screenshot shows a window titled "HSM" with a close button (X) in the top right corner. The title bar also includes the text "Logon Information". Below the title, it says: "Specify a user account and password." On the right side, there is a logo consisting of three overlapping colored squares (green, blue, and purple). The main area contains instructions: "Specify the user account to be used by this application. User accounts must be in the format DOMAIN\Username." Below this are three input fields: "User name:" with the text "democorp\domadmin", "Password:" with masked characters (dots), and "Confirm password:" with masked characters (dots). At the bottom, there are three buttons: "< Back", "Next >" (highlighted with a blue border), and "Cancel".

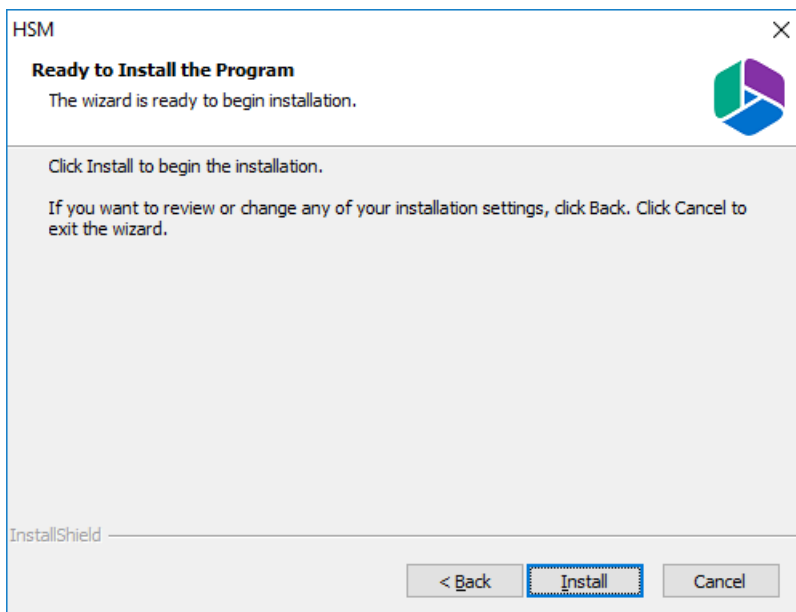
Enter the information as described below:

- User name** - login name of the administrator (for example, democorp\domadmin)
 - Password** - password of the administrator
 - Confirm password** - same as the Password.
9. Click **Next**. The *Firewall Settings* window opens.

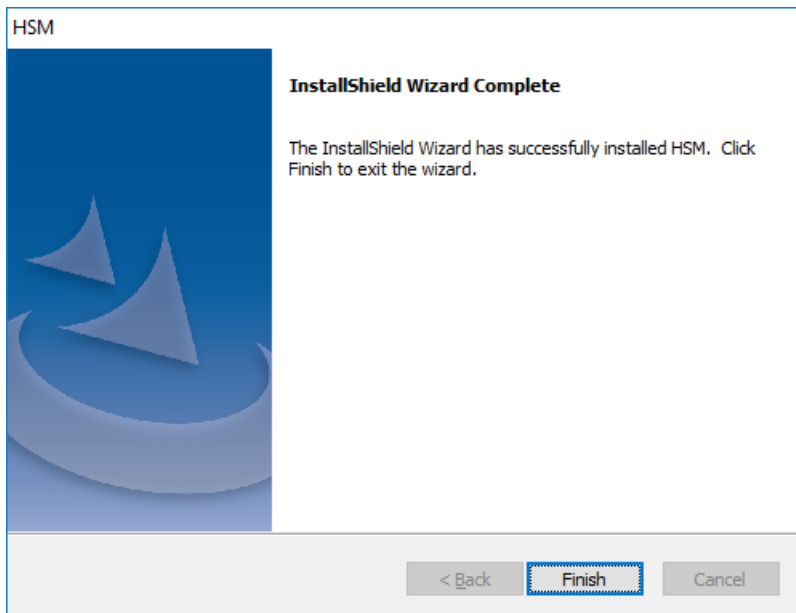


Select **Allow programs to communicate through Windows Firewall**.

10. Click **Next**. The *Ready to install the Program* window opens.



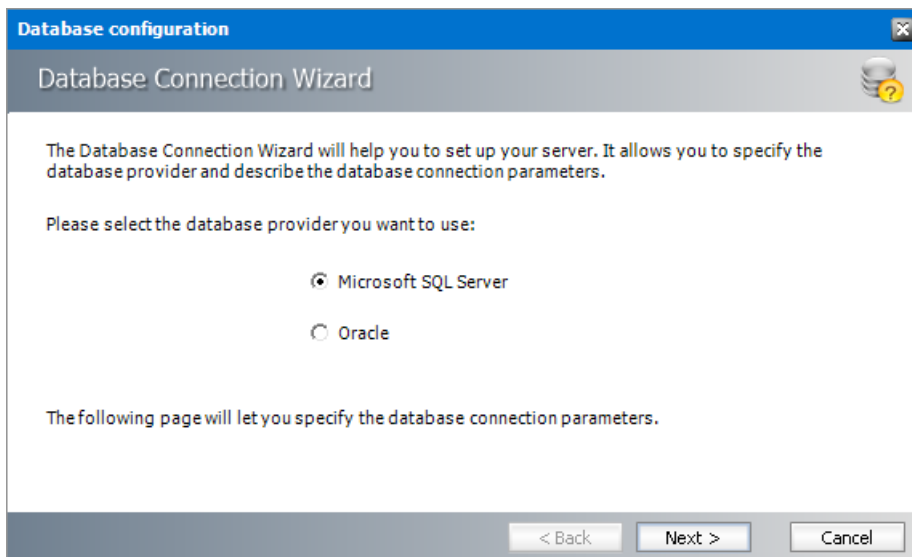
11. Click **Install**. The installation starts and the progress is displayed on the *Setup Status* window. When the installation completes, the *InstallShield Wizard Complete* window opens.



12. Click **Finish** to close the installer. The *Configuration* wizard opens and you can verify that HSM has been installed if it appears in the tool.

Steps to configure the HSM database connection

1. When the installation completes, the *Configuration* wizard opens. If it does not open automatically, click **Start > Metalogix > Archive Manager Configuration**.
2. From the feature panel on the left, click **HSM** and select the **Database** tab.
3. Click **Configure**. The *Database Connection Wizard* opens.



4. Select either **Microsoft SQL Server** or **Oracle** and click **Next**. If you choose **Microsoft SQL Server**, the *Database Connection* window opens for the Microsoft SQL Server connection information.

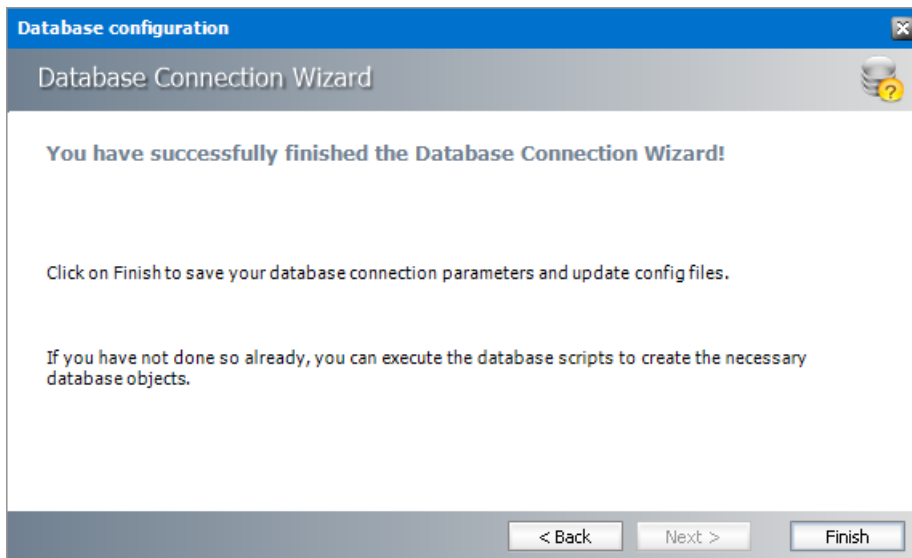
For Microsoft SQL Server

- a. **Server name** - name of the SQL server (eg. **AMFDB**)
- b. **Initial catalog** - name of the HSM database (e.g. **MAMHSM** which is the default name of the HSM database)
- c. **Schema name** - name of the SQL Schema (e.g. **dbo**)
- d. **Authentication** – authentication type used for the database. Choose either **Windows authentication** or **SQL Server authentication**
- e. **User name** - database login user name if *SQL Server authentication* is the selected as the authentication mode.
- f. **Password** - password of the database user if *SQL Server authentication* is the selected as the authentication mode.

For Oracle

- a. **Oracle net name** - net service name that describes the network address of the database server in your `tnsnames.ora` file.
 - b. **Schema** - name of the Oracle schema from your `tnsnames.ora` file.
 - c. **User name** - database login user name.
 - d. **Password** - password of the database user.
5. Click **Next** and then click **Yes** on the confirmation dialog that opens.

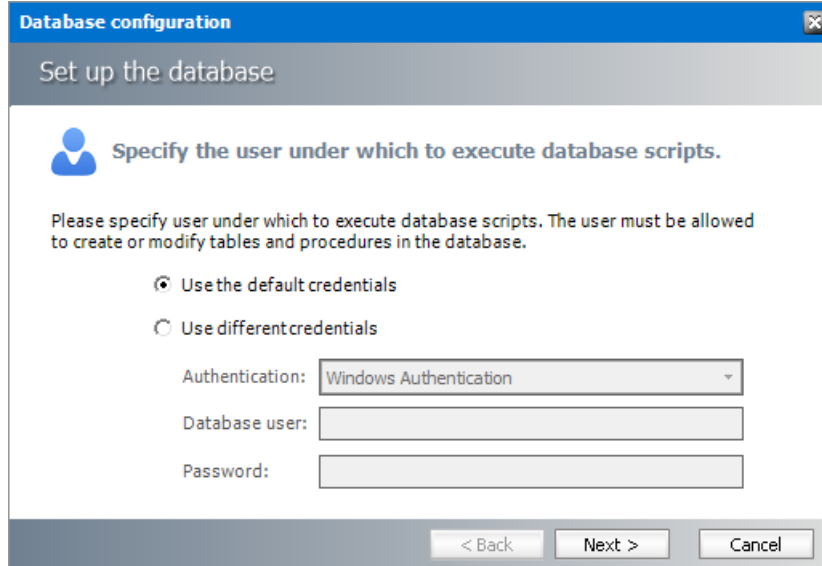
6. If the database connection is setup successfully, the configuration completion window opens.



7. Click **Finish** to close the *Database Connection* wizard.

Steps to install the HSM database

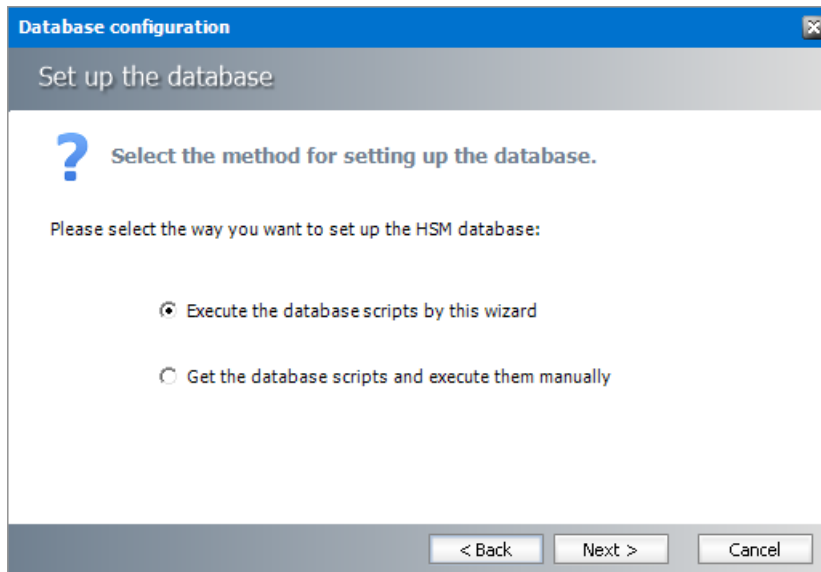
1. From the feature panel on the left in the *Configuration* wizard, click **HSM** and select the **Database** tab.
2. Verify that the database connection information is as expected. Then click **Execute Scripts**. The script installer wizard opens.



3. Select **Use the default credentials** to use the information displayed in the *Database connections* section. If you select **Use different credentials**, enter the following information:
 - a. **Authentication** - authentication type used for the database. Choose either **Windows authentication** or **SQL Server authentication**
 - a. **User name** - database login user name if *SQL Server authentication* is the selected as the authentication mode.

- b. **Password** - password of the database user if *SQL Server authentication* is the selected as the authentication mode.

4. Click **Next**.

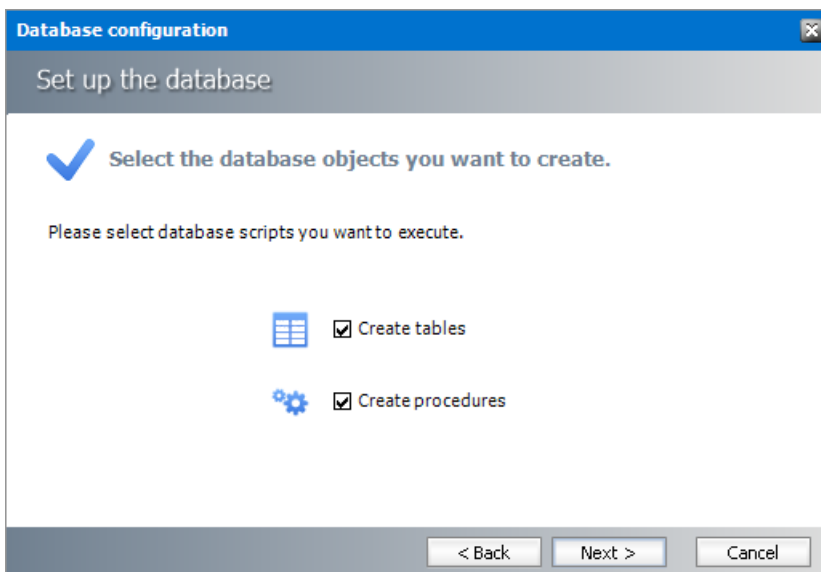


In the *Select the method for setting up the database* step, choose one of the following options:

- a. **Run the database scripts by this wizard** - the installer will automatically run the scripts to create the tables and procedures required for the database.
- b. **Get the database scripts and run them manually** - you get the option to either save the scripts or copy it to clipboard and paste it elsewhere.

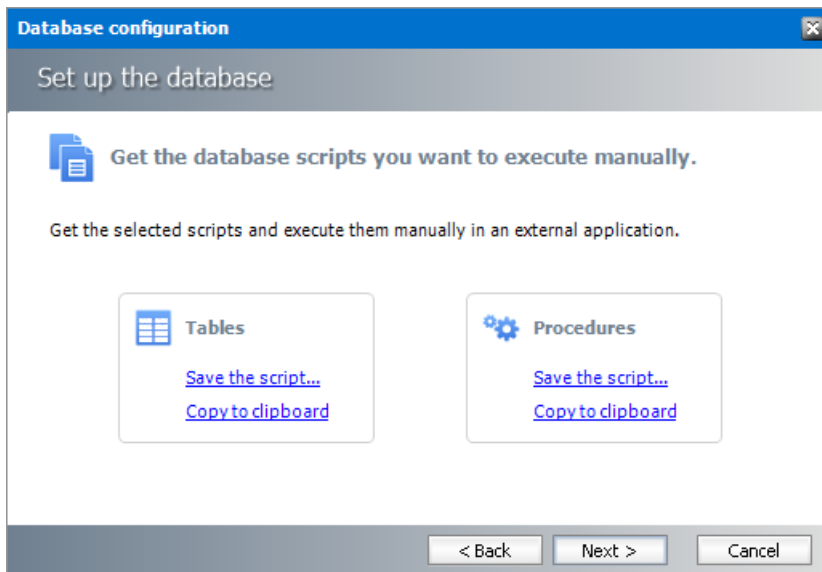
5. Click **Next**. Depending on your selection, one of the following windows open:

For Run the database scripts by this wizard



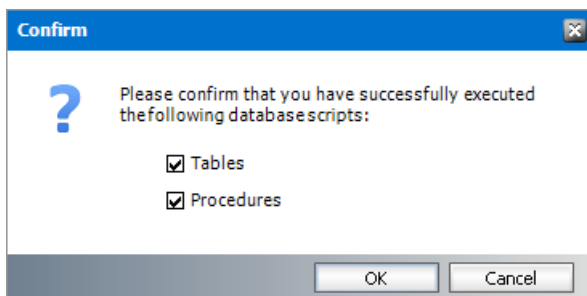
Select both check boxes: **Create tables** and **Create procedures**.

For Get the database scripts and run them manually



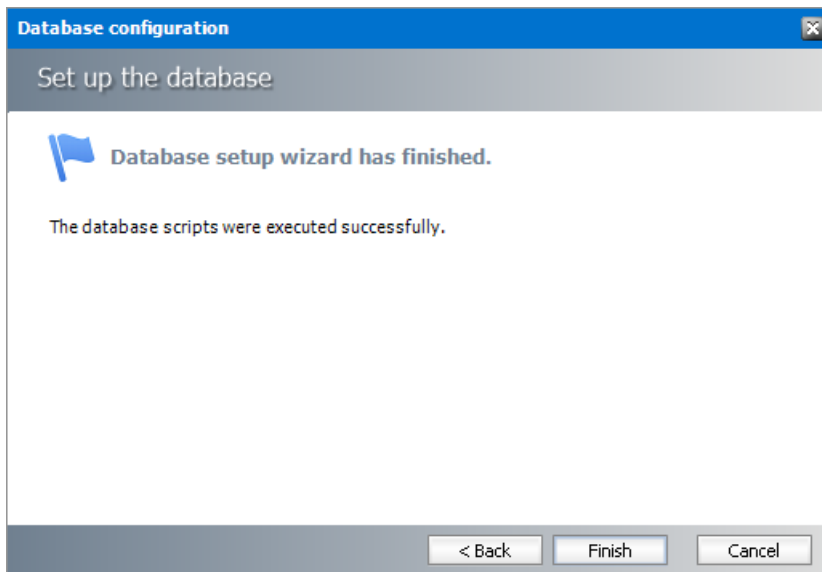
You must run both the scripts for a successful database installation.

6. Click **Next**. Depending on your selection in step 4, one of the following windows open
 - a. If you chose **Run the database scripts by this wizard**, and the installation is successful, a confirmation dialog opens. Click **OK** to close the dialog.
 - b. If you chose **Get the database scripts and run them manually**, you must run the scripts immediately because a confirmation dialog will verify whether you ran the scripts.

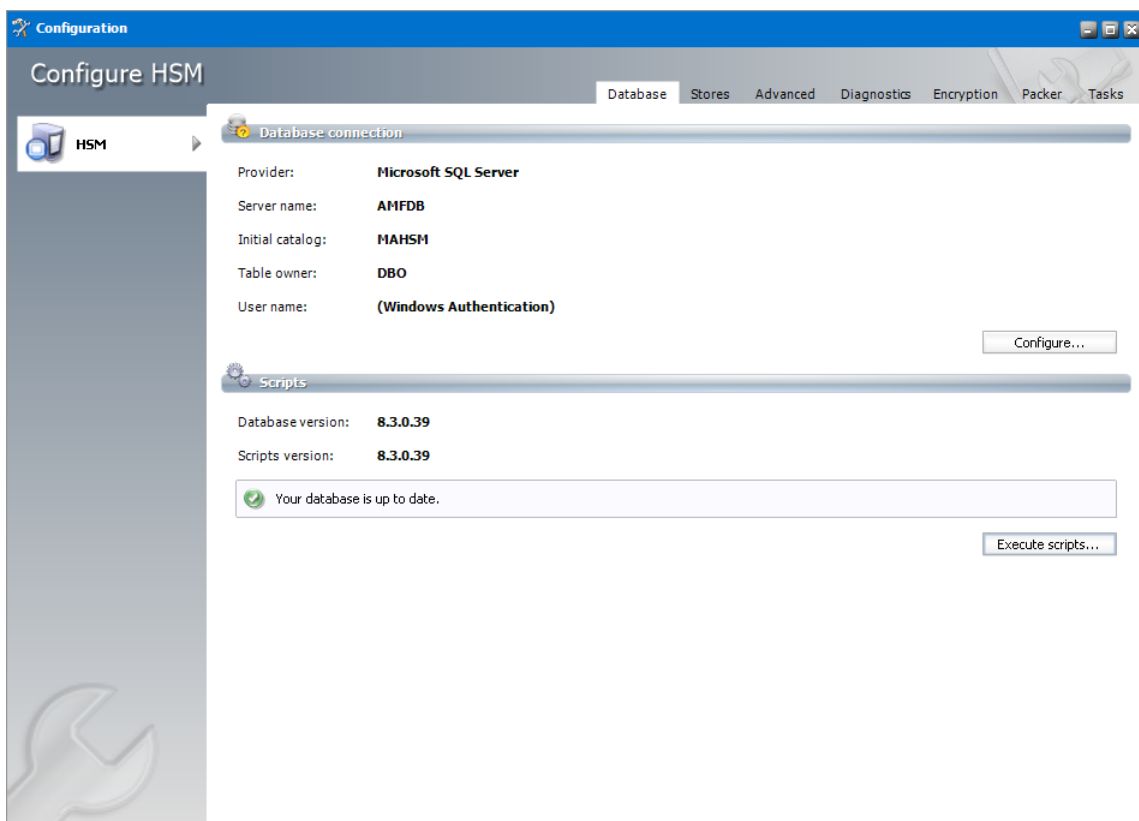


Select both check boxes after you run scripts and click **OK**.

7. If the installation is successful, the confirmation dialog opens. Click **OK** to close the dialog. The database setup completion window opens.



8. Click **Finish** to close the script installer. The *Scripts* section of the **Database** tab displays the status and version of the scripts (the version of the scripts you install may differ from the version shown in the image below).



9. Keep the *Configuration* wizard open for next steps.

Steps to configure the HSM stores and schemas

1. From the feature panel on the left of the *Configuration* wizard, click **HSM** and select the **Stores** tab.

2. From the *Stores* section click **New Store**. The *Create a new media Store* window opens.

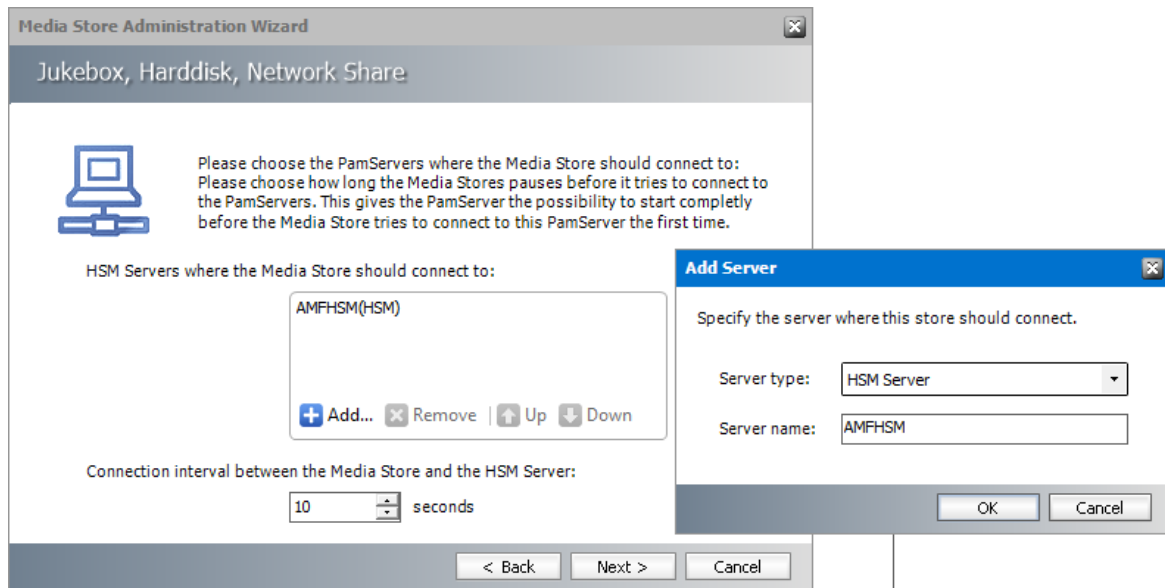
The screenshot shows the 'Media Store Administration Wizard' window with the title 'Create a new Media Store'. It features a database icon and the instruction 'Choose a name and type for the Media Store.' Below this, there is a dropdown menu for 'Media Store type' with the selected value 'Jukebox, Harddisk, Network Share'. A text field for 'Name of the new Media Store:' contains the text 'FILESTORE'. At the bottom, there are three buttons: '< Back', 'Next >', and 'Cancel'.

3. Click **Next**. The location information window opens.

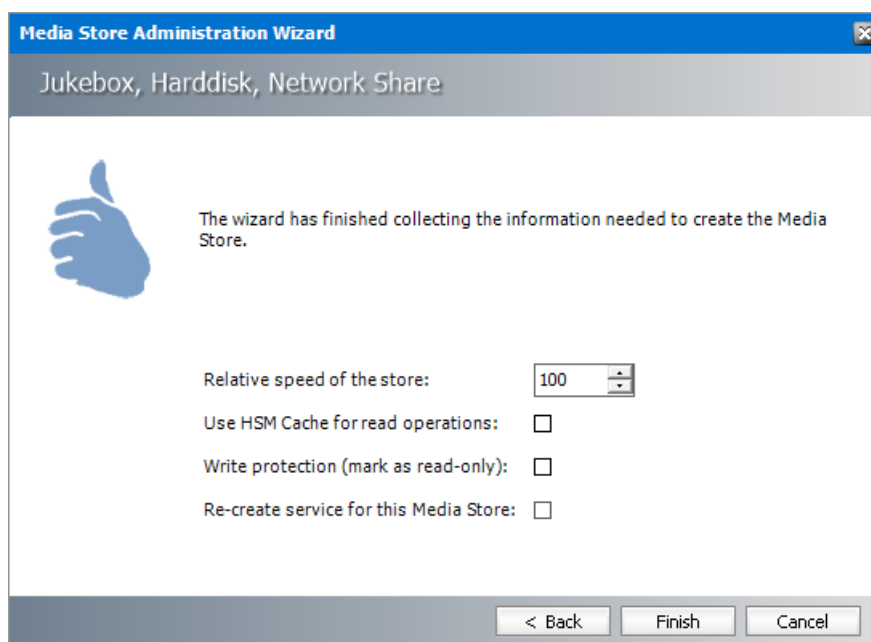
The screenshot shows the 'Media Store Administration Wizard' window with the title 'Jukebox, Harddisk, Network Share'. It features a database icon and the instruction 'Choose a location where the archived files should be saved. Use a supported storage provider for this Media Store.' Below this, there are several fields: 'Storage provider :' with a dropdown menu showing 'Hard disk, UNC Path'; 'Path for the Media Store:' with the text '\\AMFISM\HSM' and a 'Browse...' link; 'Allow multiple saving:' with an unchecked checkbox; 'Path for multiple saving:' with a text field and a 'Browse...' link; 'Path for fast file access:' with a dropdown menu; and 'Retention time support:' with a dropdown menu showing '<None>'. At the bottom, there are three buttons: '< Back', 'Next >', and 'Cancel'.

Enter the information as described below;

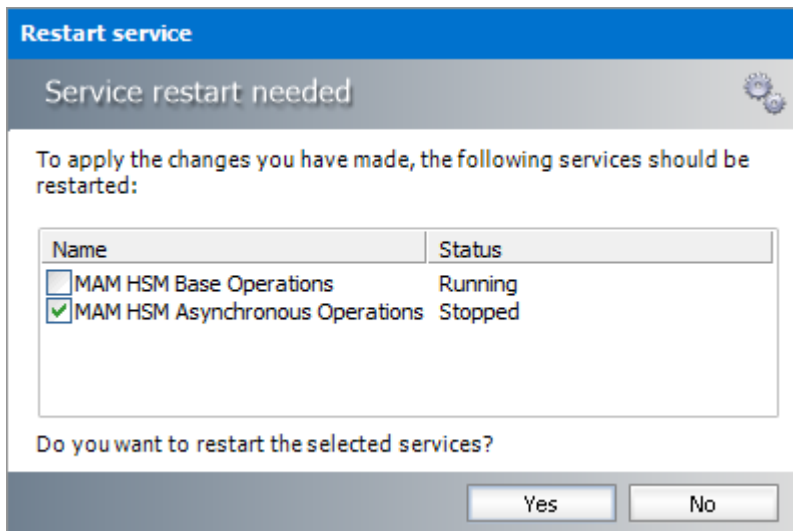
- a. **Storage Provider** - select Hard disk, UNC Path because we are going to setup a media store in a folder on the local hard drive.
 - b. **Path for the media store** - Browse and create a folder if it does not exist (eg. `\AMFISM\HSM`). You could specify a UNC path to a shared folder as well.
4. Keep clicking **Next** to accept the default settings on each window until you reach the HSM server connection information window. Every media store must provide this information so the HSM server can connect to it. For more information about various media stores see the *Archive Manager for Files - Media Store Administration Guide*.



5. Click **Add**. The *Add Server* window opens. Enter the following information:
 - a. **Server type** - select **HSM Server**
 - b. **Server name** - name of the server where HSM is installed (eg. **AMFHSM**)
6. Click **OK** to close the window and add the the HSM Server to the list.
7. Click **Next**. The final configuration window appears.

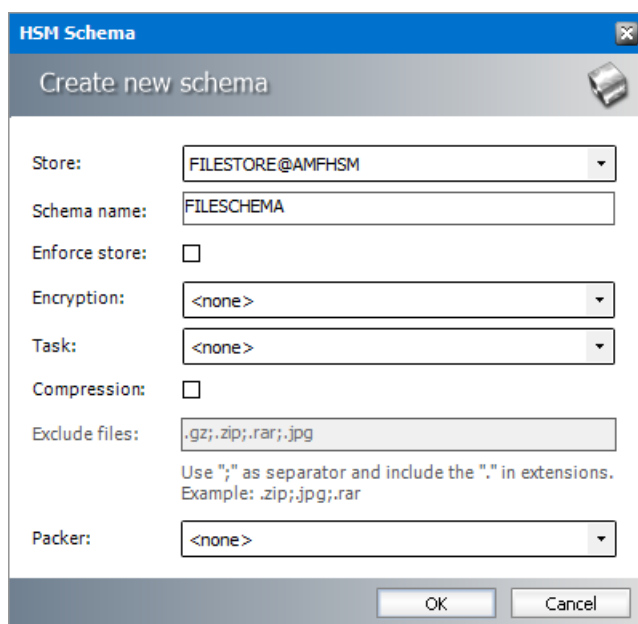


8. Accept the defaults and click **Finish**. The *Service Restart* window opens.



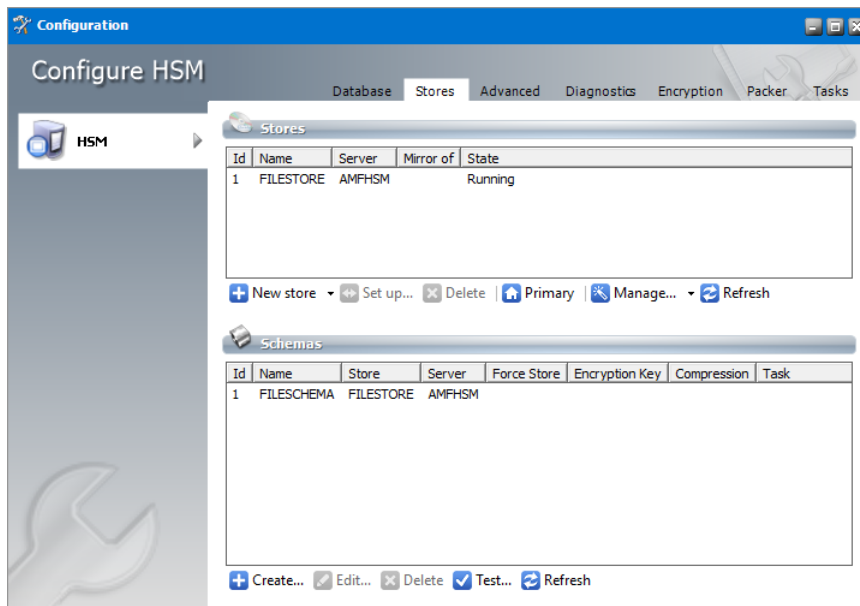
Select one or more check boxes where the **Status** indicates **Stopped**. Click **Yes** to restart the service so that the HSM service is aware of the media store configuration.

9. Verify that the media store information appears in the *Stores* tab of the *Configuration* wizard.
10. From the *Schemas* section in the *Stores* tab of the *Configuration* wizard, click **New Schema**. The *Create new schema* window opens.



Enter the following information:

- a. **Store** - verify that it indicates the media store you just created.
 - b. **Schema name** - enter a name for the schema (eg. **FILESHEMA**)
11. Click **OK** to save the schema information. In the *Service Restart* window opens, select one or more check boxes where the **Status** indicates **Stopped**. Click **Yes** to restart the service so that the HSM service is aware of the schema information.
 12. Verify that the schema information appears in the *Schemas* section of the *Stores* tab in the *Configuration* wizard.

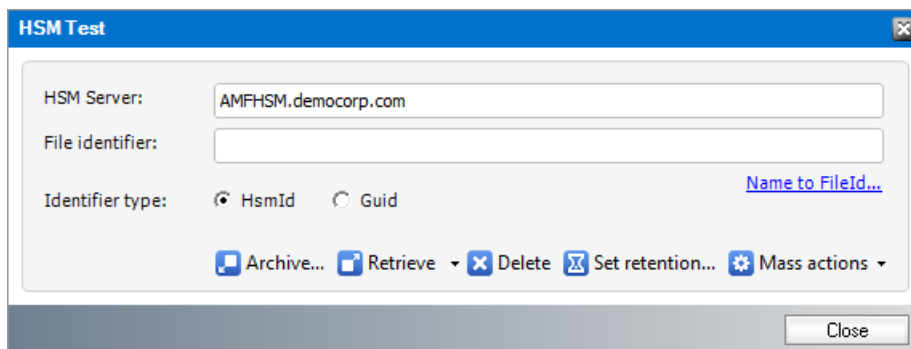


13. Close the *Configuration* wizard.

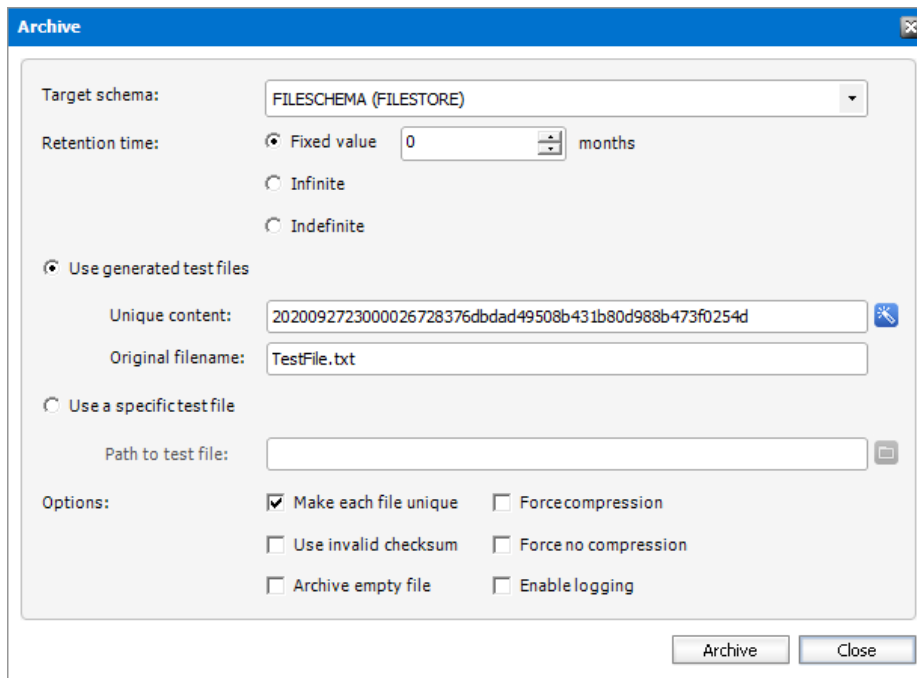
i **NOTE:** The steps to create a local media store described above with default values completes the HSM installation. HSM offers more capabilities that can be configured. Configuration of HSM is described in detail in the *HSM Installation and Configuration Guide*. A large selection of media store types that are supported by Metalogix Archive Manager for Files are described in the *Media Store Administration Guide*.

Steps to test the HSM and Media Store connectivity

1. Open the *Configuration* wizard and select HSM from the feature panel.
2. Click the **Stores** tab. Then click **Test** from the **Schemas** section. The *HSM Test* window opens.



3. Click **Archive**. The *Archive* window opens.



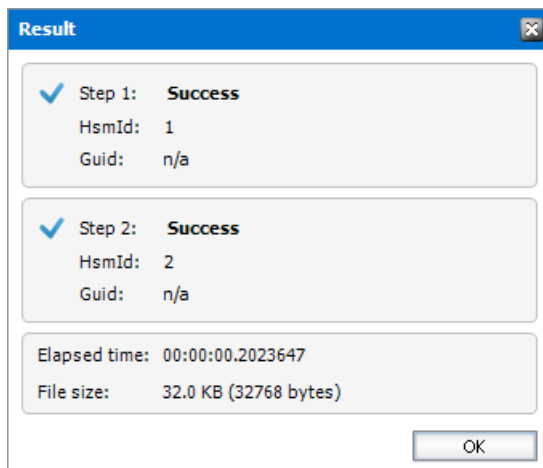
The **Archive** dialog box is shown with the following settings:

- Target schema:** FILESCHEMA (FILESTORE)
- Retention time:** Fixed value (selected), 0 months
- Use generated test files** (selected):
 - Unique content:** 2020092723000026728376dbdad49508b431b80d988b473f0254d
 - Original filename:** TestFile.txt
- Use a specific test file** (not selected):
 - Path to test file:** (empty field)
- Options:**
 - ☒ Make each file unique
 - ☐ Force compression
 - ☐ Use invalid checksum
 - ☐ Force no compression
 - ☐ Archive empty file
 - ☐ Enable logging

Buttons: Archive, Close

Keep the default test file settings. Copy the value in the **Unique content** field if you wish to test the retrieve process.

- Click **Archive**. The *Result* window opens.

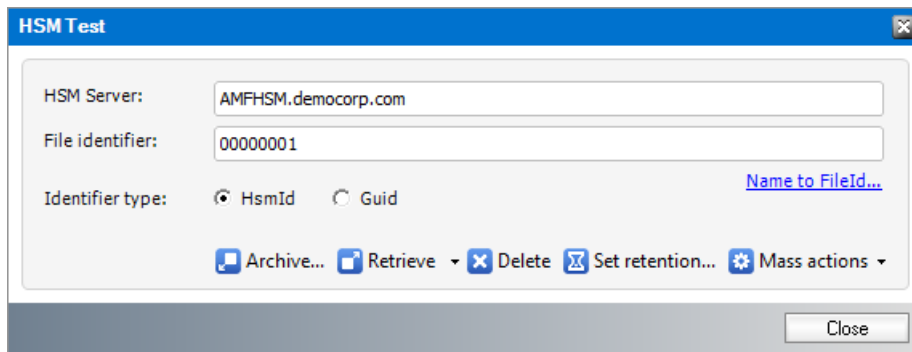


The **Result** dialog box displays the following information:

- Step 1: Success**
 - HsmId: 1
 - Guid: n/a
- Step 2: Success**
 - HsmId: 2
 - Guid: n/a
- Elapsed time:** 00:00:00.2023647
- File size:** 32.0 KB (32768 bytes)

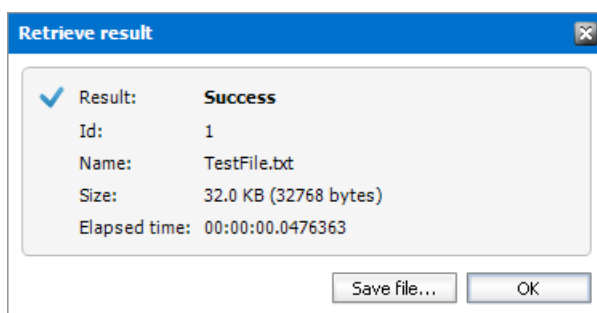
Button: OK

- Verify that the result indicates success. Then click **OK** to close the *Result* window. Then close the *Archive* window.
- In the *HSM Test* window, enter the name of the file that was archived in the Media Store during the archive test.



For example if the TestFile.txt was archived as 00000001.txt, enter **00000001** in the **File Identifier** field.

7. Click **Retrieve**. The *Result* window opens.



8. Verify that the result indicates success. Then click **OK** to close the *Result* window. Then close the other windows.

Install Archive Manager Search

The Archive Manager Search installer also installs the Post Processing service which allows a user to run specific tasks on each archived message. Archive Manager Search can be installed on a dedicated server, but in keeping with the topology described in the [Deployment Plan](#)^[10] we will install the Archive Manager Search and Post Processing service on the same server where HSM was installed (eg. AMFHSM).

In this topic:

For Archive manager Search

- [Worksheet for this installation](#)^[50]
- [Steps to install Archive Manager Search](#)^[51] (with Post Processing)
- [Steps to configure the Search database connection](#)^[54]
- [Steps to install the Search database](#)^[56]
- [Steps to configure Search Scopes](#)^[62]

For Post Processing

- [Steps to configure the Post Processing database connection](#)^[58]

- [Steps to install the Post Processing database](#) 
- [Steps to configure Post Processing Scopes](#)

Worksheet for this installation

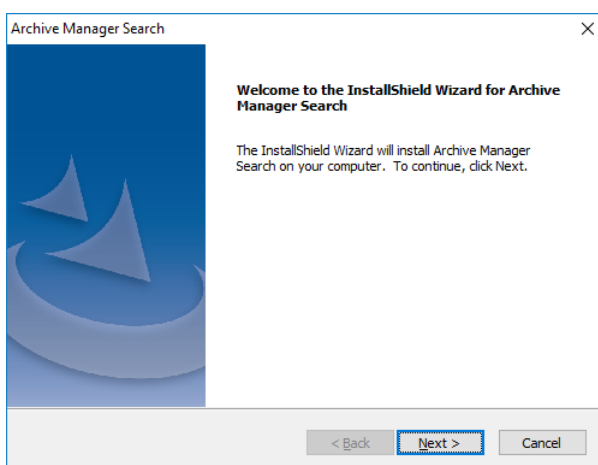
The following information will be required through the installation process. Sample values are provided here as a guidance.

Item	Description	Example
HSM server	The server where the HSM and Archive Manager Search will be installed.	AMFHSM
Administrator	Windows account that is used to install the application and run the Archive Manager for Exchange services.	username: democorp\domadmin password: *****
Media folder	Full path of the folder where the media files are extracted	C:\Metalogix
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 The local hard drive folder is used as the default media store. Use of other media storage systems are described in the <i>Media Store Administration Guide</i> .
Store name	Name of the media store on a hard drive. With the <i>Advanced Installation</i> option of the installer wizard, only a local hard drive can be setup as a media store.	FILESTORE
Schema name	Name of a schema in a hard drive media store.	FILESHEMA
Database Authentication method	Type of database authentication: <i>Integrated</i>	Integrated Windows Authentication

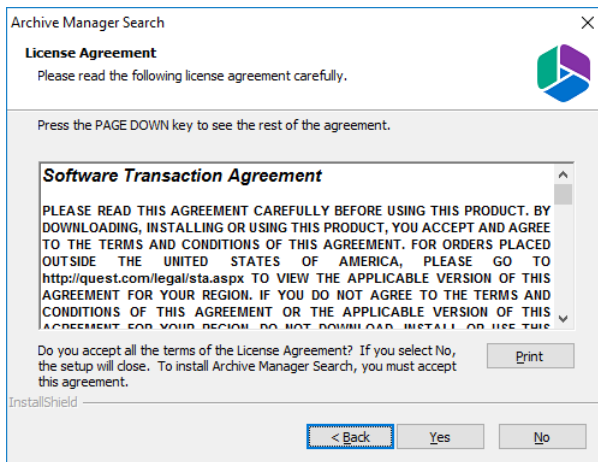
	<i>Windows Authentication or SQL Authentication</i>	
UserLogin	Username if <i>SQL Authentication</i> is selected	dbadmin
Password	Database password if <i>SQL Authentication</i> is selected	*****
Database server	The database server instance name where the databases for Archive Manager for Files will be installed.	AMFDB

Steps to install Archive Manager Search

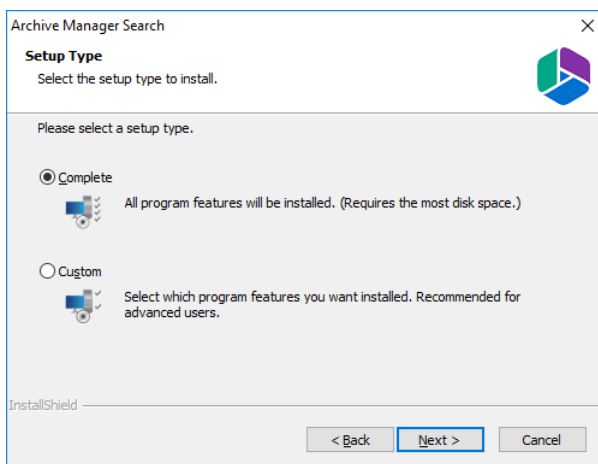
1. Log in to the server where HSM was installed (eg. **AMFHSM**) with the credentials of the superuser (eg. **democorp\domadmin**)
2. Download the installation media. For more information see [Steps to download the install media](#)³³.
3. Run the **Metalogix Archive Manager Installation Package** to extract the files to a local folder.
4. Close the integrated installer wizard which starts automatically.
5. Run the Archive Manager Search setup from <Media folder>\Archive Manager Installation Package\Archive Manager Search\Archive Manager Search Setup.exe.
6. A prerequisite check occurs and missing requirements if any are displayed. Click **Install** to ensure all missing requirements are installed.
7. The *Welcome* window of the HSM installer opens.



8. Click **Next**. The *License Agreement* window opens.

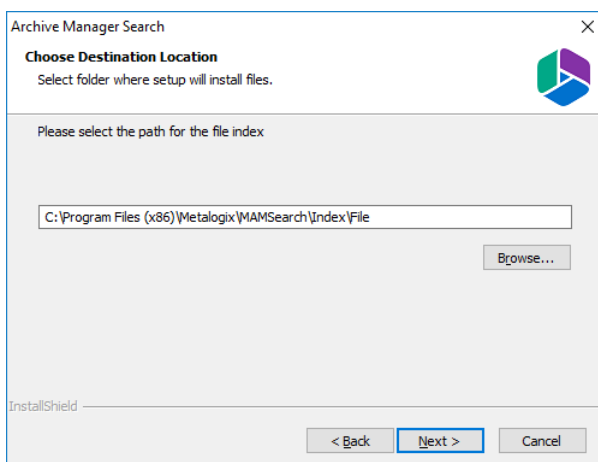


9. Click **Yes** to accept the license. The *Setup Type* window opens. Click **Print** if you wish to print the license agreement.

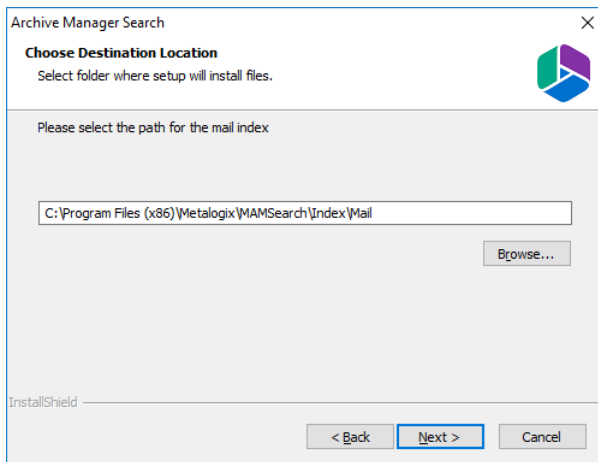


Select **Complete** to include *Post Processing* service. If you select **Custom**, you can modify the installation folder path which defaults to C:\Program Files (x86)\Metalogix\MAMSearch, and choose to whether you want to install Archive Manager Search or Post Processing or both.

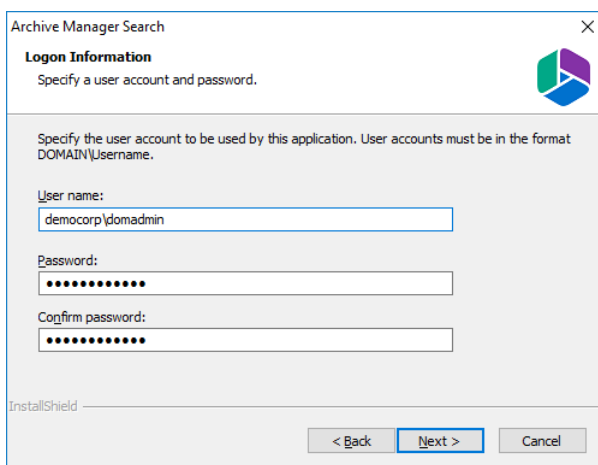
10. Click **Next**. The *Choose Destination Location* windows opens. This setting is for the *Metalogix Archive Manager for Files* product and is not used by Metalogix Archive Manager for Exchange.



11. Accept the default setting and click **Next**. The *Choose Destination Location* for the mail index opens.



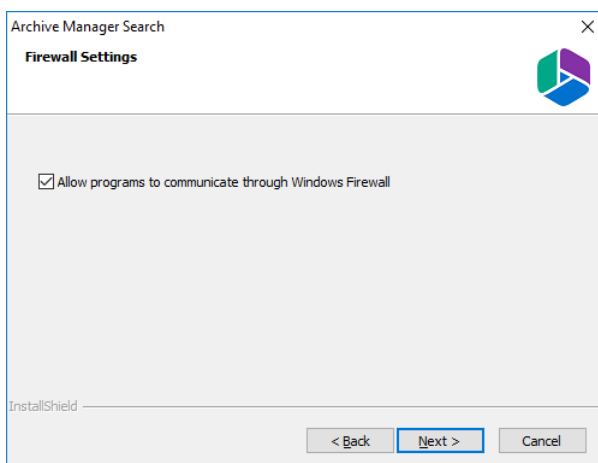
12. Accept the default setting and click **Next**. The *Logon Information* window opens.



Enter the information as described below:

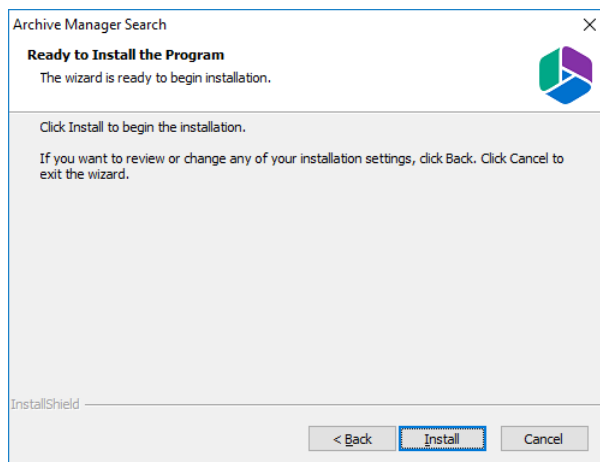
- a. **User name** - logon name of the superuser (for example, democorp\mamadmin)
- b. **Password** - logon password of the superuser
- c. **Confirm password** - same as the Password.

13. Click **Next**. The *Firewall Settings* window appears.

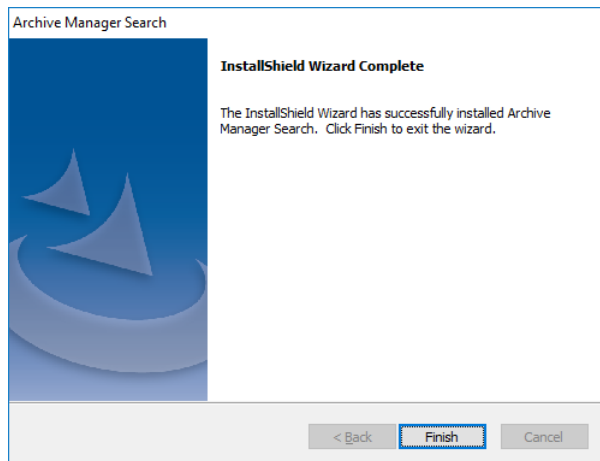


Select the check box **Allow programs to communicate through Windows Firewall**.

14. Click **Next**. The *Ready to Install the Program* window opens.

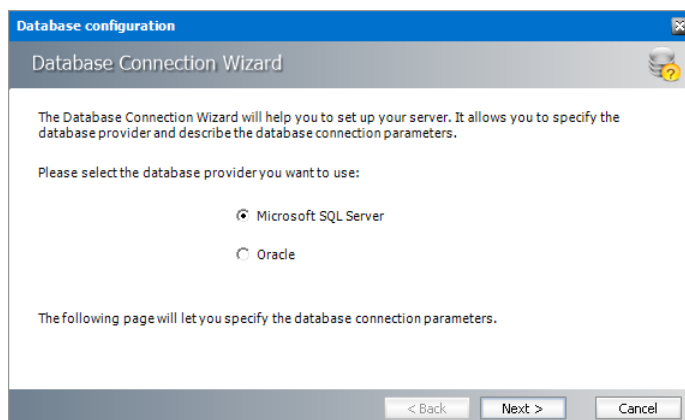


15. Click **Install**. The *InstallShield Wizard Complete* window opens.

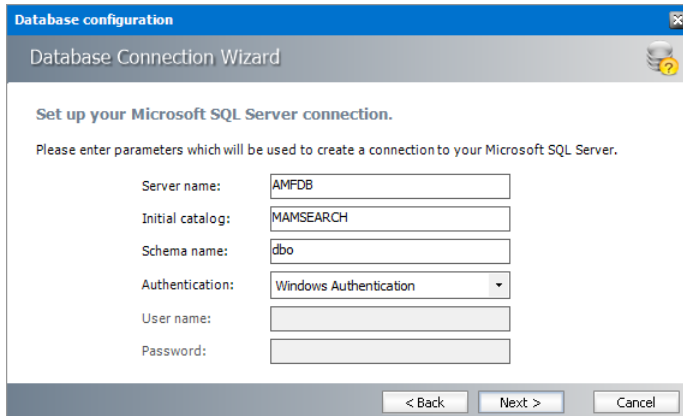


Steps to configure the Search database connection

1. When the installation completes, the *Configuration* wizard opens. If it does not open automatically, click **Start > Metalogix > Archive Manager Configuration**.
2. From the feature panel on the left, click **Search** and select the **Database** tab.
3. Click **Configure**. The *Database Connection Wizard* opens.



4. Select either **Microsoft SQL Server** or **Oracle** and click **Next**. The database connection information window opens for the selected database.

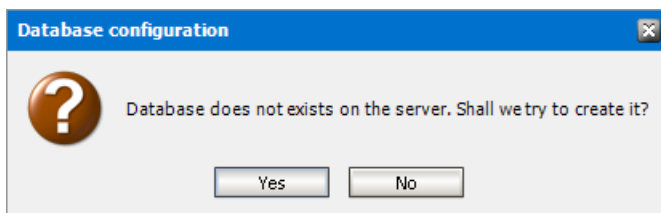


For Microsoft SQL Server

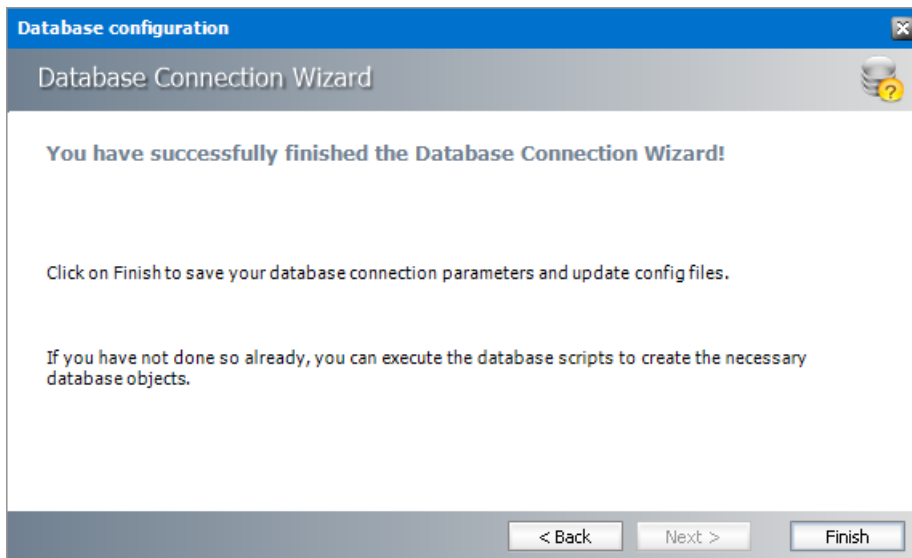
- a. **Server name** - name of the SQL server (eg. **AMFDB**)
- b. **Initial catalog** - name of the HSM database (e.g. **MAMSEARCH** which is the default name of the Archive Manager Search database)
- c. **Schema name** - name of the SQL Schema (e.g. **dbo**)
- d. **Authentication** – authentication type used for the database. Choose either **Windows authentication** or **SQL Server authentication**
- e. **User name** - database login user name if *SQL Server authentication* is the selected as the authentication mode.
- f. **Password** - password of the database user if *SQL Server authentication* is the selected as the authentication mode.

For Oracle

- a. **Oracle net name** - net service name that describes the network address of the HSM database in your `tnsnames.ora` file (eg. **AMFDB**)
 - b. **Schema** - name of the HSM database (e.g. **MAMSEARCH** which is the default name of the Archive Manager Search database)
 - c. **User name** - database login user name
 - d. **Password** - password of the database user
5. Click **Next** and then click **Yes** on the confirmation dialog that opens.



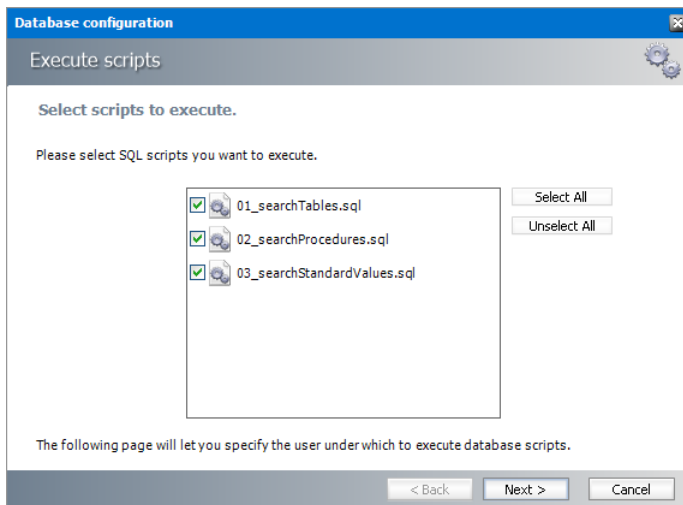
6. If the database connection is setup successfully, the configuration confirmation window opens.



7. Click **Finish** to close the *Database Connection* wizard.

Steps to install the Search database

1. From the feature panel on the left in the *Configuration* wizard, click **Search** and select the **Database** tab.
2. Verify that the database connection information is as expected. Then click **Run Scripts**. The *Run Scripts* selection window opens.



3. Click **Select All** to select all check boxes. Click **Next**. The *View SQL scripts* window opens.
4. Click **Next**. The *Run Scripts* authentication window opens.

Database configuration

Execute scripts

Specify the user under which to execute database scripts.

Please specify user under which to execute database scripts. The user must be allowed to create or modify tables and procedures in the database.

Authentication:

Database user:

Password:

☒ I want to see the SQL script before execution (for advanced users)

< Back Next > Cancel

Enter the information as described below:

- a. **Authentication** - authentication type used for the database. Choose either **Windows authentication** or **SQL Server authentication**
 - a. **User name** - database login user name if *SQL Server authentication* is the selected as the authentication mode.
 - b. **Password** - password of the database user if *SQL Server authentication* is the selected as the authentication mode.
 - c. (optional) Check the **I want to review the SQL Scripts** check box to view the scripts.
5. Click **Next**. If you chose to view the SQL scripts then the *View SQL scripts* window opens. If you chose to view the Oracle scripts then the *View Oracle scripts* window opens

Database configuration

Execute scripts

View SQL scripts.

Here you can see the SQL script that will be executed.

```

/*
MS-SQL scripts for Quest PostProcessing
DBVERSION: 8.3.0.16
Date: August 2020
Company: Quest Software Inc.
*/

if not exists (select * from sysobjects where id = OBJECT_ID(N'[dbo].[ATPAMDBVERSION]') and
OBJECTPROPERTY(id, N'IsUserTable') = 1)
BEGIN
    CREATE TABLE [dbo].[ATPAMDBVERSION]
    (
        [APPLICATION] VARCHAR (50) NOT NULL,
        [MAJORVERSION] INT NOT NULL,
        [MINORVERSION] INT NOT NULL,
        [REVISIONVERSION] INT NOT NULL,
        [CREATIONDATE] DATETIME NOT NULL
    )

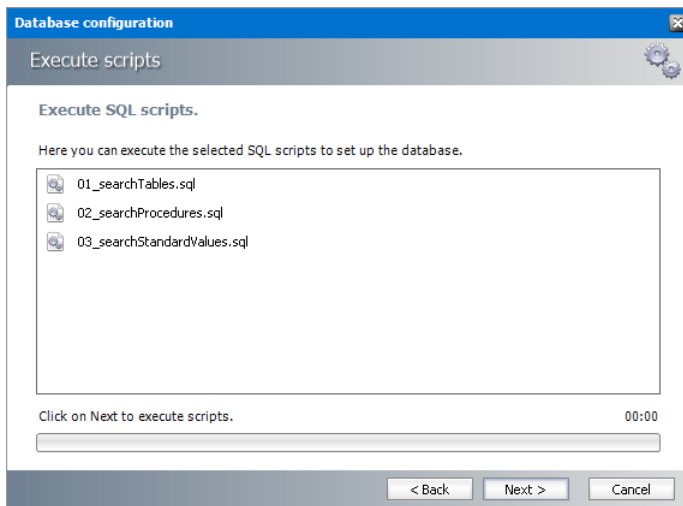
```

Save Script... Word wrap ☒

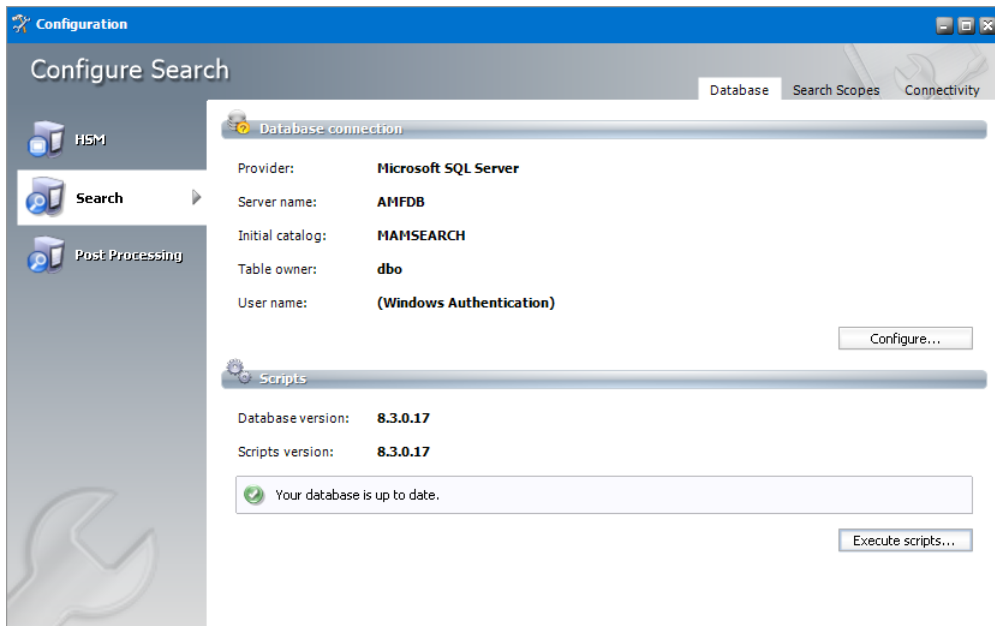
< Back Next > Cancel

Click **Save Script** to save the script as a script file to a folder. Check the **Word wrap** check box to display long lines as multiple lines of text.

6. Click **Next**. The *Run SQL scripts* window reopens with the scripts you have chosen to run.

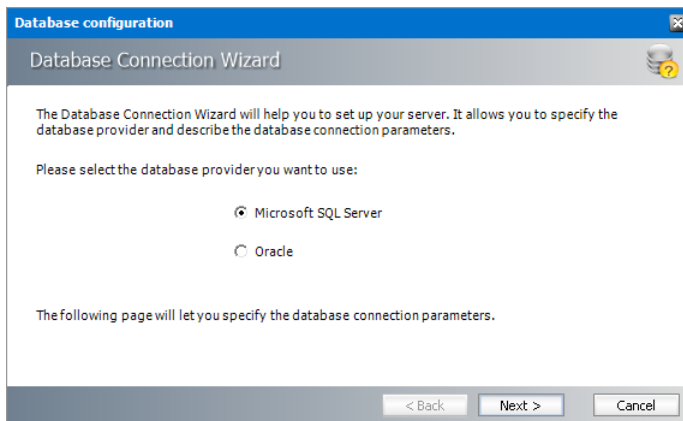


7. Click **Next**. When the status changes to *Scripts were run successfully*, click **Finish** to close the script installer. The *Scripts* section of the *Configuration* wizard displays the status and version of the scripts.

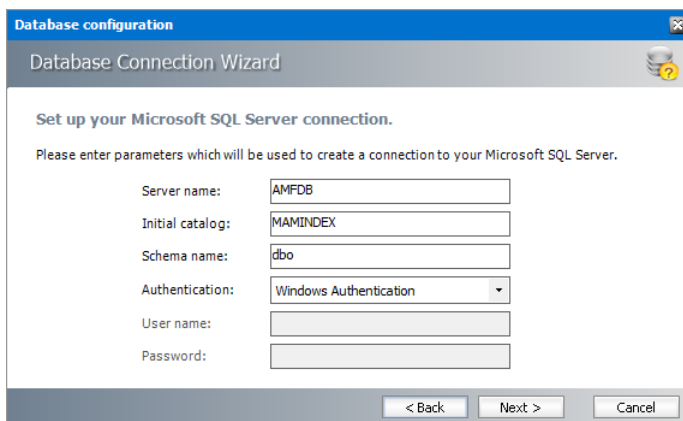


Steps to configure the Post Processing database connection

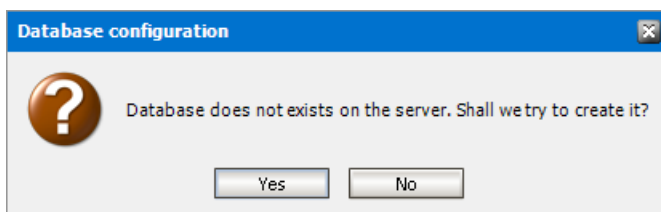
1. When the installation completes, the *Configuration* wizard opens. If it does not open automatically, click **Start > Metalogix > Archive Manager Configuration**.
2. From the feature panel on the left, click **Post Processing** and select the **Database** tab.
3. Click **Configure**. The *Database Connection Wizard* opens.



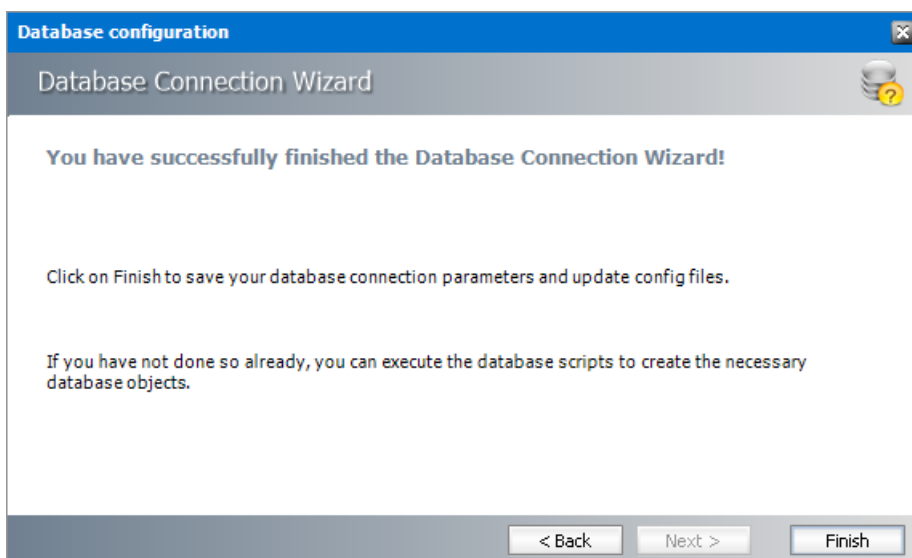
4. Click **Next**. The *SQL Server connection* window opens.



5. Click **Next** and then click **Yes** on the confirmation dialog that opens.



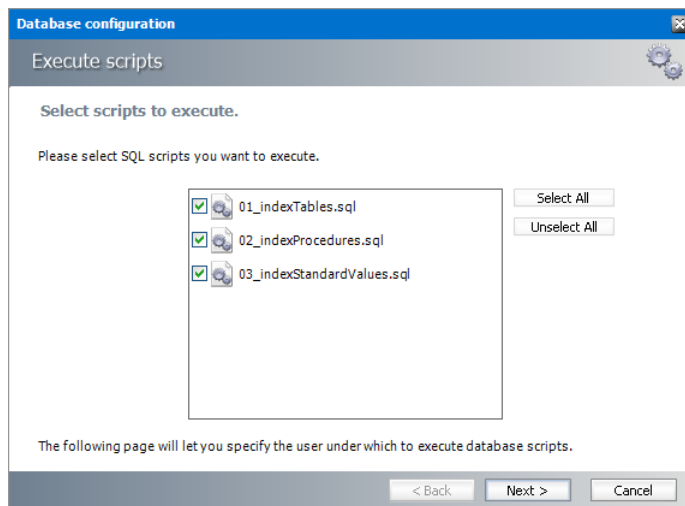
6. If the database connection is setup successfully, the confirmation window opens.



7. Click **Finish** to close the *Database Connection* wizard.

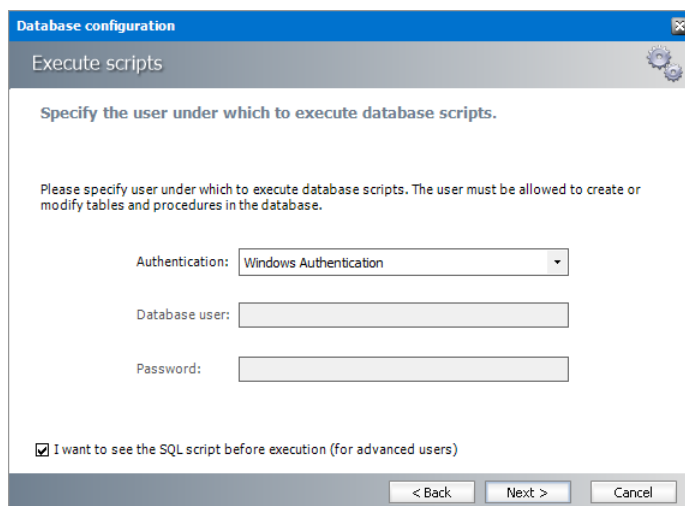
Steps to install the Post Processing database

1. From the feature panel on the left of the *Configuration* wizard, click **Post Processing** and select the **Database** tab.
2. Verify that the database connection information is as expected. Then click **Execute Scripts**. The *Execute Scripts* selection window opens.



Click **Select All** to select all check boxes. Click **Next**. The *View SQL scripts* window opens.

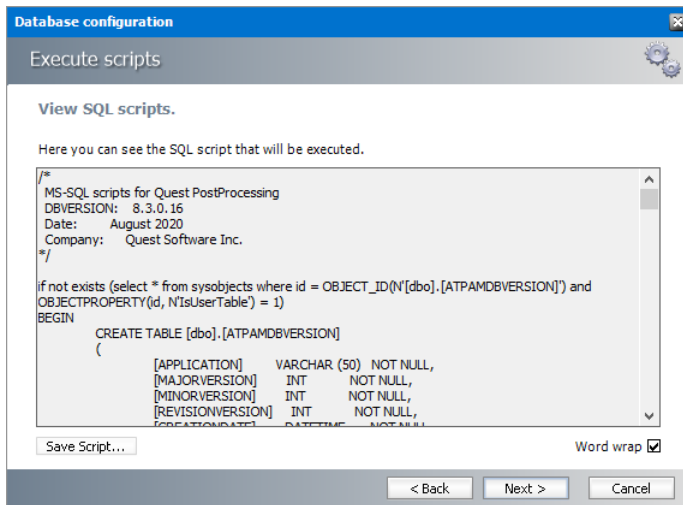
3. Click **Next**. The *Execute Scripts* authentication window opens.



Enter the information as described below:

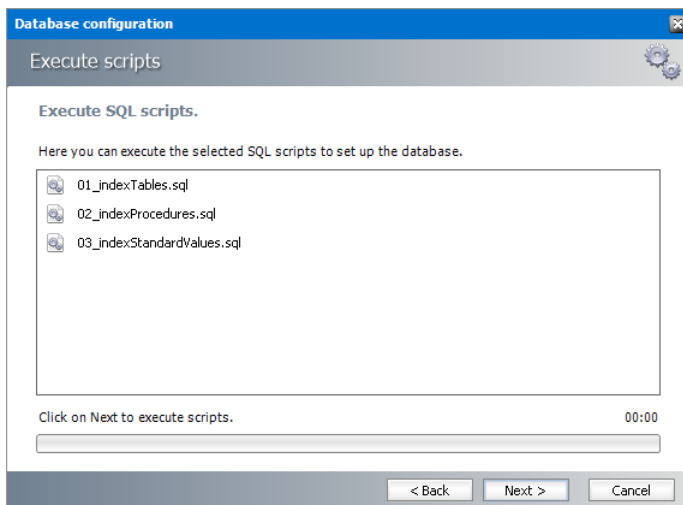
- a. **Authentication** - authentication type used for the database. Choose either **Windows authentication** or **SQL Server authentication**
- b. **User name** - database login user name if *SQL Server authentication* is the selected as the authentication mode.
- c. **Password** - password of the database user if *SQL Server authentication* is the selected as the authentication mode.

- d. (optional) Check the **I want to review the SQL Scripts** check box to view the scripts.
4. Click **Next**. If you chose to view the SQL scripts then the *View SQL scripts* window opens. If you chose to view the Oracle scripts then the *View Oracle scripts* window opens

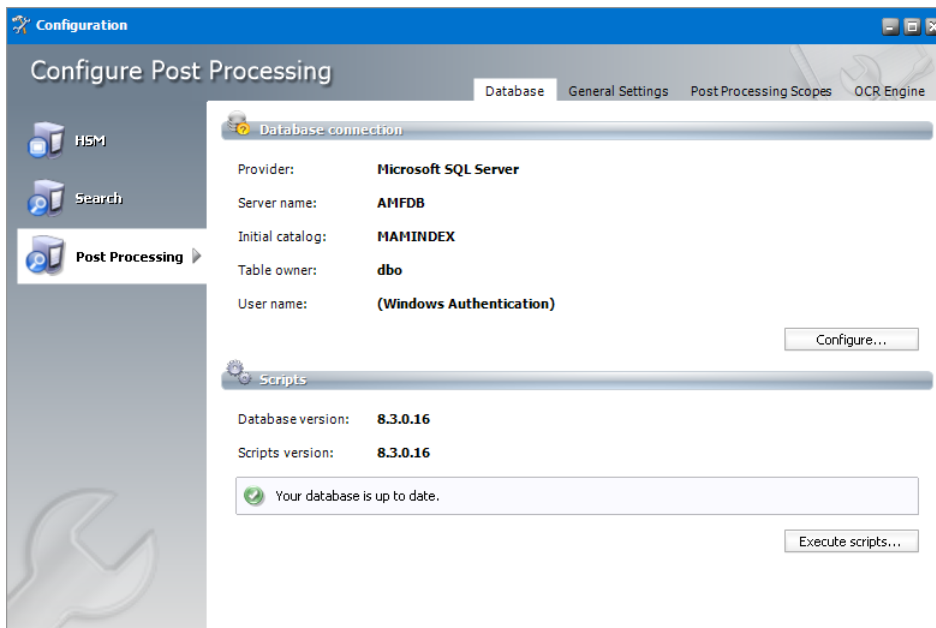


Click **Save Script** to save the script as a script file to a folder. Check the **Word wrap** check box to display long lines as multiple lines of text.

5. Click **Next**. The *Run SQL scripts* window reopens with the scripts you have chosen to run.



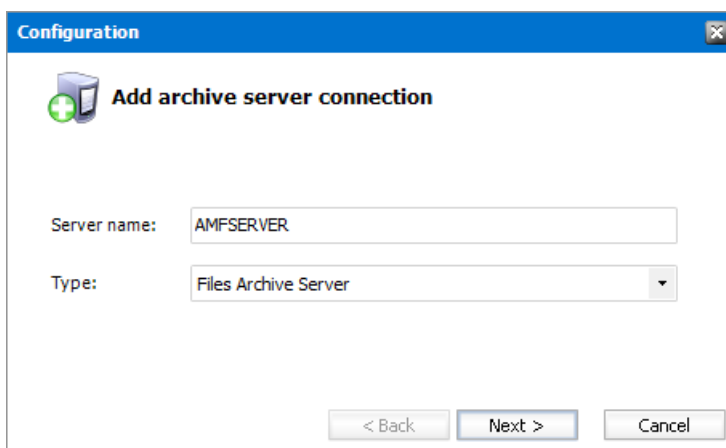
6. Click **Next**. When the status changes to *Scripts were run successfully*, click **Finish** to close the script installer. The *Scripts* section of the *Configuration* wizard displays the status and version of the scripts (the version of the scripts you install may differ from the version shown in the image below).



IMPORTANT: You may close the *Configuration* wizard. Click **Cancel** on any warning dialogs that may open. Additional Post Processing configuration is required but must wait until the Archive Server installation and configuration is completed. See [Install Archive Manager for Files](#) for next steps.

Steps to configure Search Scopes

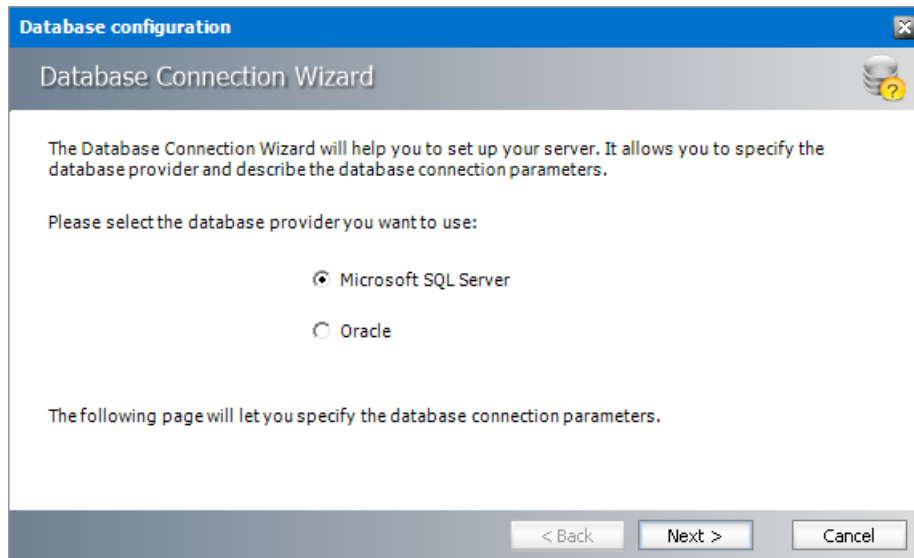
1. From the feature panel on the left in the *Configuration* wizard, click **Search** and select the **Search Scopes** tab.



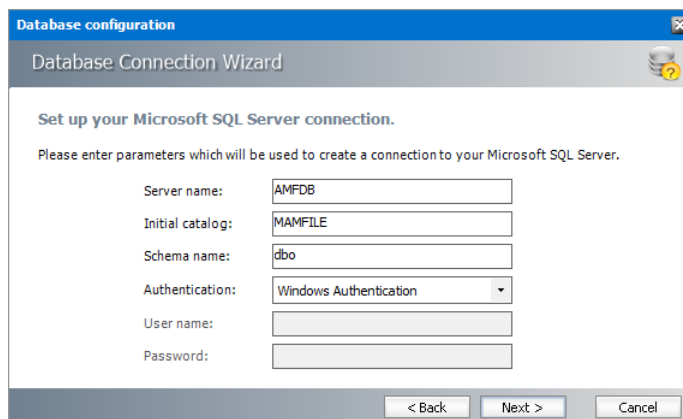
Enter the information and described below:

- a. **Server name** - name of the Archive Manager for Files server (eg. AMFSERVER).
 - b. **Type** - Select **File Archive Server**.
2. Click **Next**. The *Set up the Archive database connection* window opens.

3. If the database already exists, click **Import**. Otherwise click **Configure** to setup the Archive Manager for Files database. The *Database Connection Wizard* opens.



4. Select either **Microsoft SQL Server** or **Oracle** and click **Next**. The database connection information window opens for the selected database.

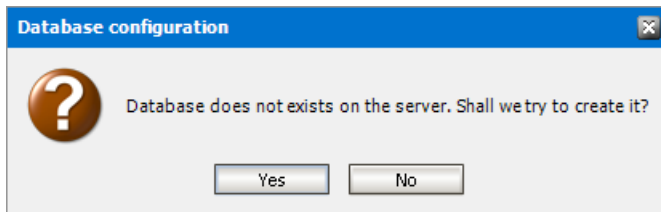


For Microsoft SQL Server

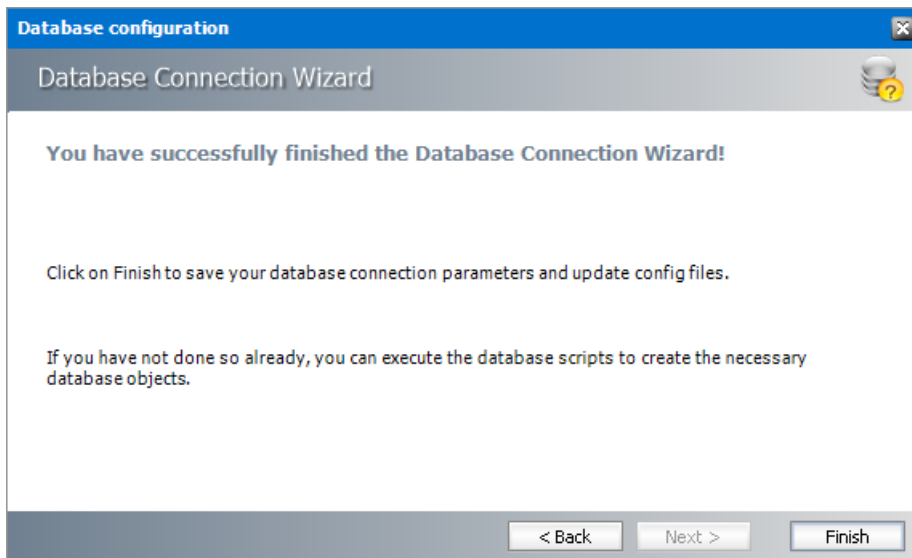
- a. **Server name** - name of the SQL server (eg. **AMFDB**)
- b. **Initial catalog** - name of the Archive Manager for Files database (e.g. **MAMFILE** which is the default name of the Archive Manager for Files database)
- c. **Schema name** - name of the SQL Schema (e.g. **dbo**)
- d. **Authentication** – authentication type used for the database. Choose either **Windows authentication** or **SQL Server authentication**
- e. **User name** - database login user name if *SQL Server authentication* is the selected as the authentication mode.
- f. **Password** - password of the database user if *SQL Server authentication* is the selected as the authentication mode.

For Oracle

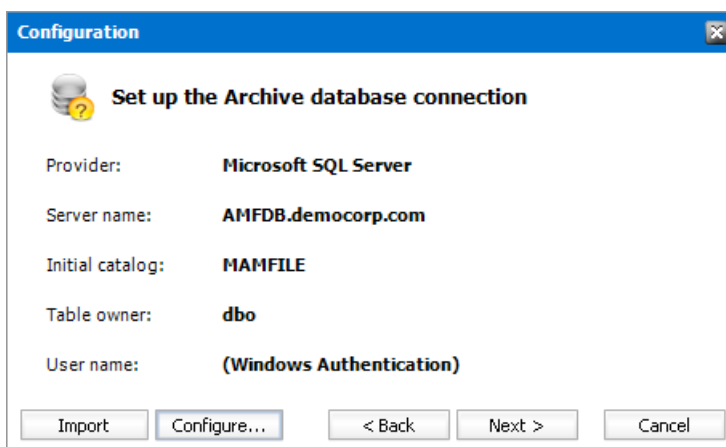
- a. **Oracle net name** - net service name that describes the network address of the HSM database in your `tnsnames.ora` file (eg. **AMFDB**)
 - b. **Schema** - name of the Archive Manager for Files database (e.g. **MAMFILE** which is the default name of the Archive Manager for Files database)
 - c. **User name** - database login user name
 - d. **Password** - password of the database user
5. Click **Next** and then click **Yes** on the confirmation dialog that opens.



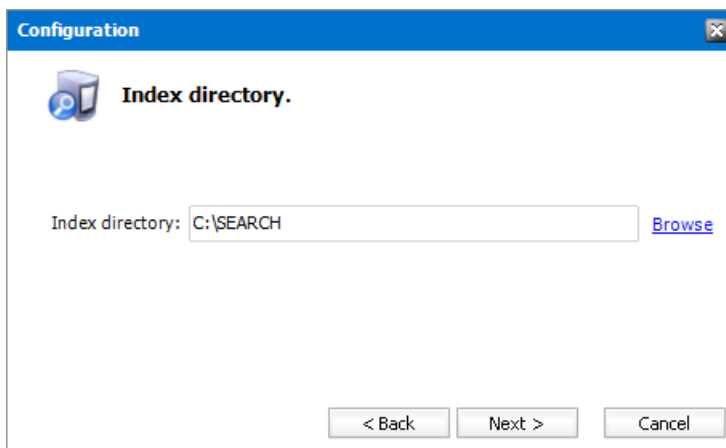
6. If the database connection is setup successfully, the configuration confirmation window opens.



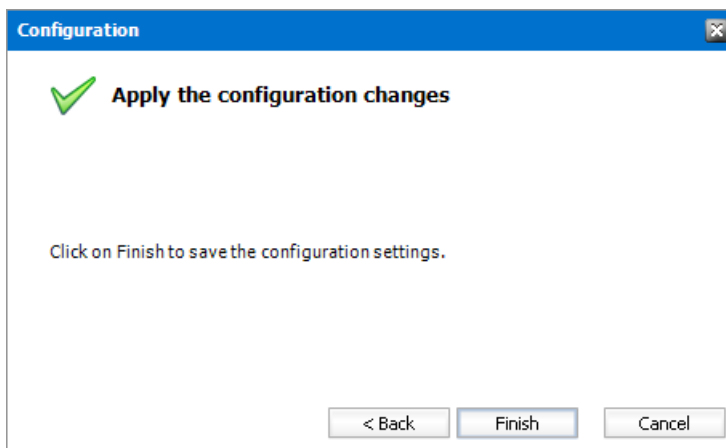
7. Click **Finish** to close the *Database Connection* wizard. The *Set up the Archive database connection* window opens.



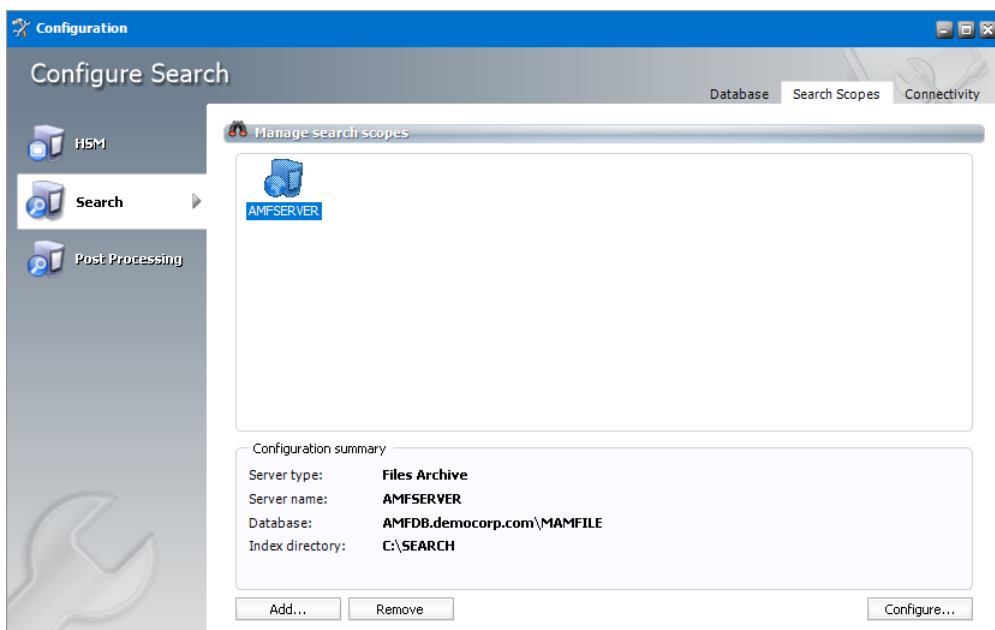
- Click **Next**. The *Configuration* window for the *Index directory* opens.



- Click **Browse** to select or create a folder for the search index and then click **Next**. The *Apply the configuration changes* confirmation window opens.



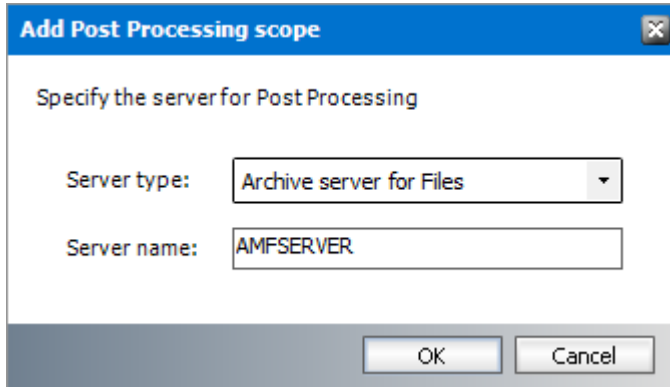
- Click **Finish**. The Archive server is added to the *Manage search scopes* section.



- Close the *Configuration* wizard.

Steps to configure Post Processing Scopes

1. From the feature panel on the left in the *Configuration* wizard, click **Search** and select the **Search Scopes** tab.



Enter the information and described below:

- a. **Server type** - select **Archive server for Files**
 - b. **Server name** - specify the name of the Archive Manager for Files server.
2. Click **OK**.

Install Archive Manager for Files

Enter topic text here.

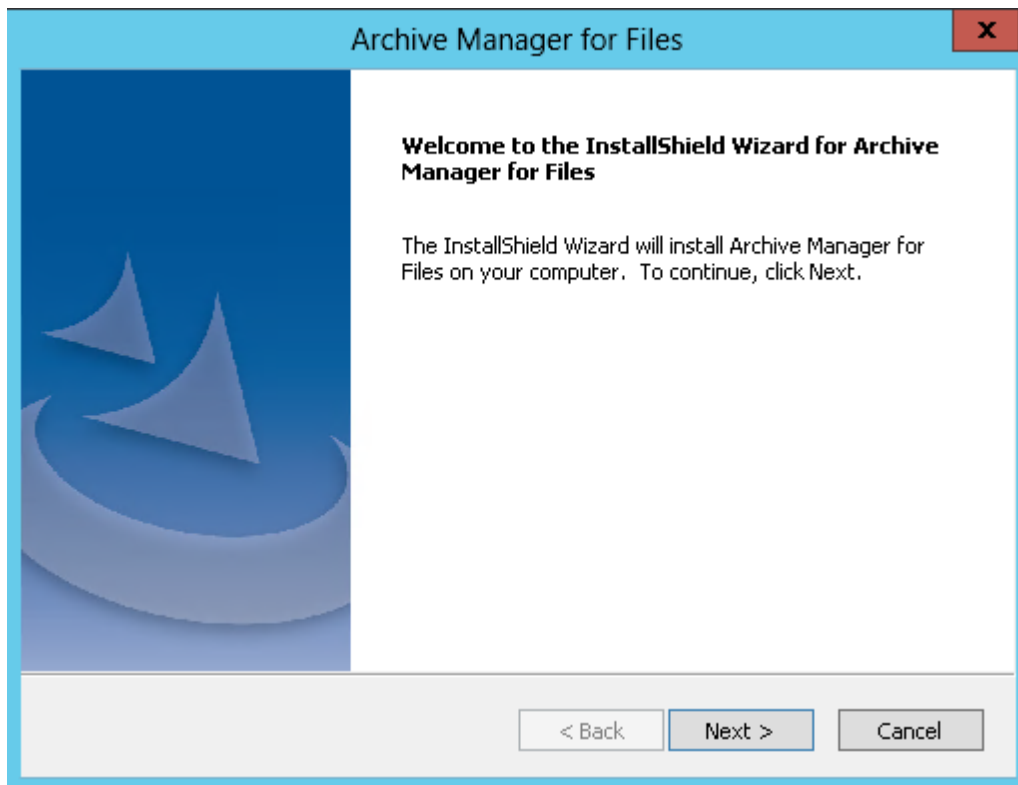
Installation of Archive Manager for Files

When HSM is installed and configured, you can proceed with Archive Manager for Files installation.

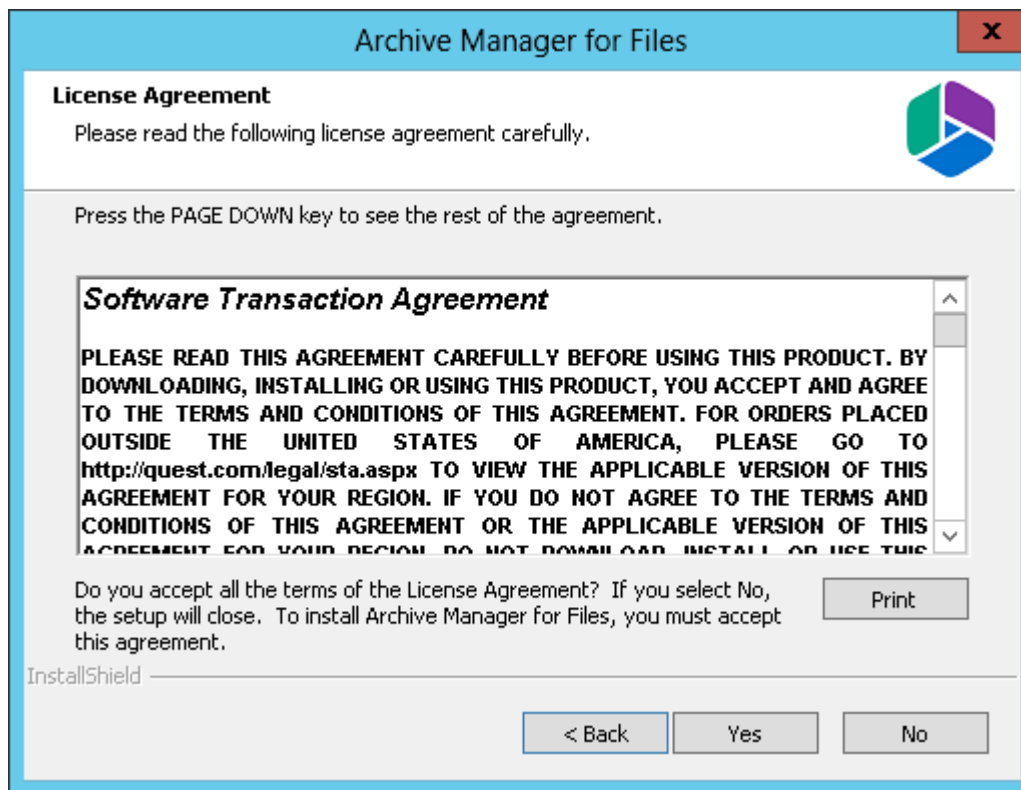
i NOTE: The licensing model has changed from version 5.0. As a result the setup will ask for a license key even in case of updating.

To install Archive Manager for Files on your Archive Manager Server, do as follows:

1. Run `<media-folder>\Metalogix\Archive Manager Installation Package\Files\Archive Manager for Files Setup.exe`
2. Click **Next**.



3. On the **License Agreement** page read the license agreement. Confirm it by clicking **Yes** to continue.



Before proceeding with installation, you need to apply the license. There can be two different situations:

- Archive Manager server has an internet connection (a)
 - Archive Manager server has NO internet connection (b)
- a) If the server has an internet connection, follow the next steps:
- Enter your license key and click **Next**.
 - **NOTE:** If the internet access is filtered out by a proxy on the server, click the **Set proxy** link to enter the proxy settings.

- The license will be validated and you can continue the installation.

b) If the server has NO internet connection, follow the next steps:

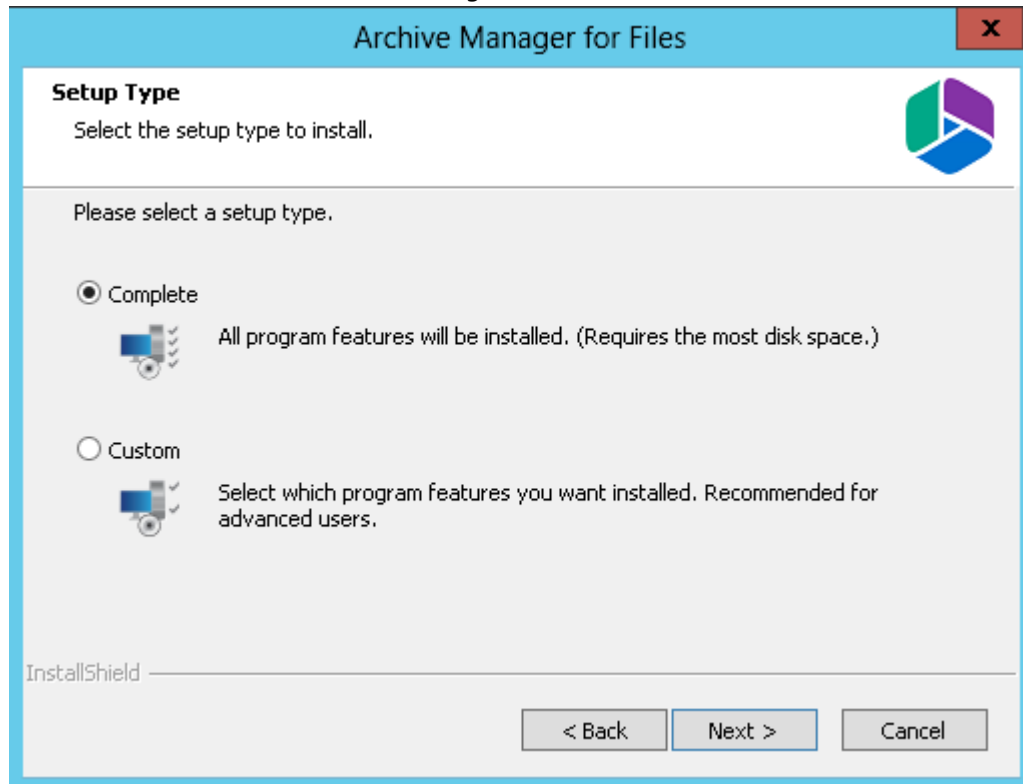
- Enter your license key.
- Select the **Offline activation** radio button and click **Next**.
- Copy the *Activation request* text from the **Activation request** text box or save it as a file (click the *Save to file* link)
- On a machine with internet access open the Activation URL (listed under the Activation Request).
- Paste the *Activation Request* text you have copied or **Browse** for the file you have saved and click **Activate**
- *Activation text* is generated. Again copy the text or save it as a file
- Back on the Archive Manager server click **Next** to proceed to the **Enter your Activation Response** dialog. Paste the *Activation text* you have copied from the Quest web page or load the file.
- Click **Next**, then **Finish**.

NOTE: In case your Archive Manager server has no Internet connection permanently, you will be asked to revalidate your license periodically. It is the same process as described in the part b) above.

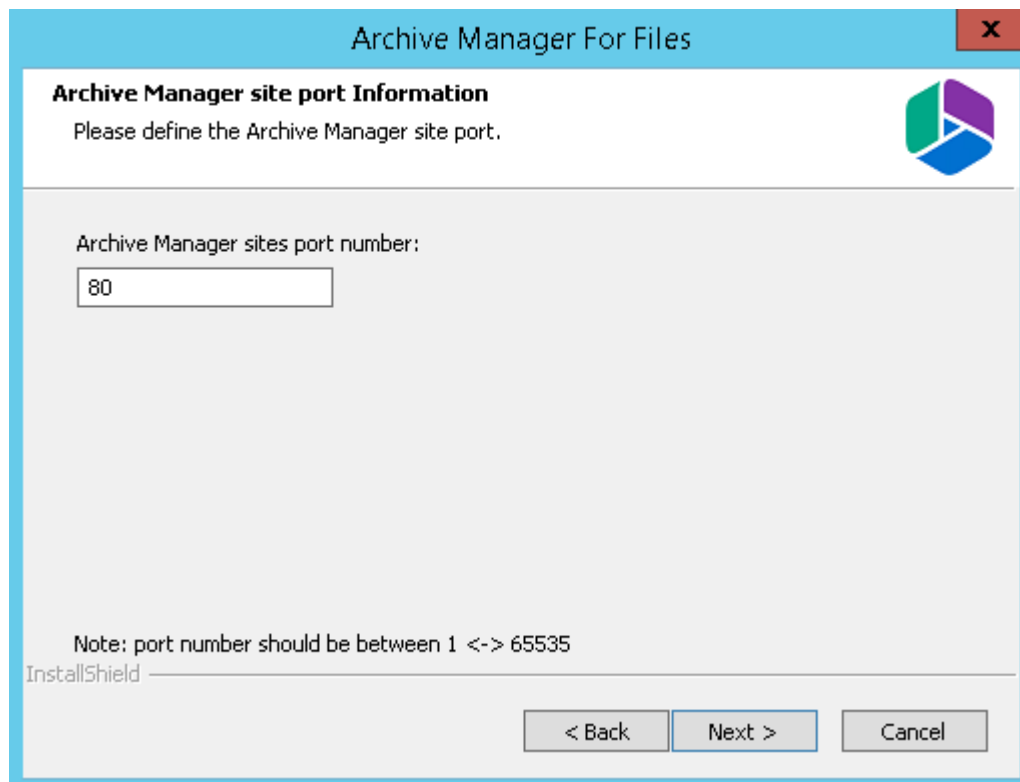
4 . On the **Setup Type** page select the **Complete** option and proceed by clicking **Next**.

NOTE: **Custom** option allows advanced users to manage individual features of our product, e.g. install Auditing or ArchiveWeb remotely.

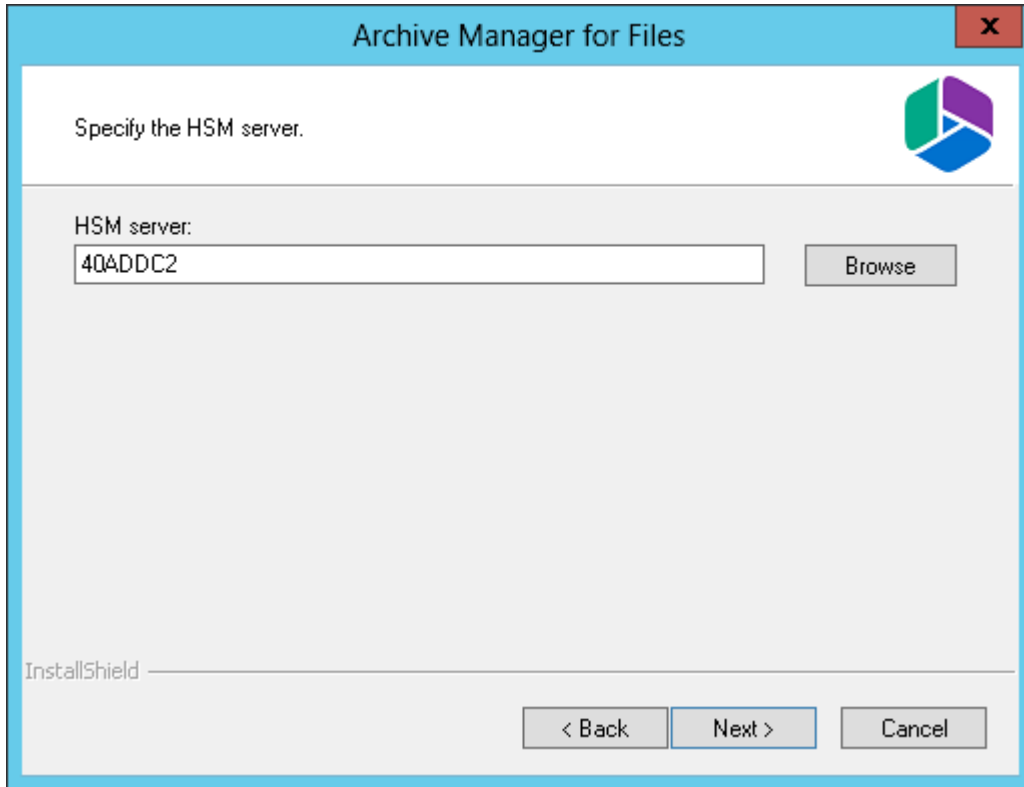
For more information see the *Auditing* or *ArchiveWeb* manuals.



5. Specify a port value. Port numbers can be between 1 and 65535. A typical value is 80. Then click **Next**.



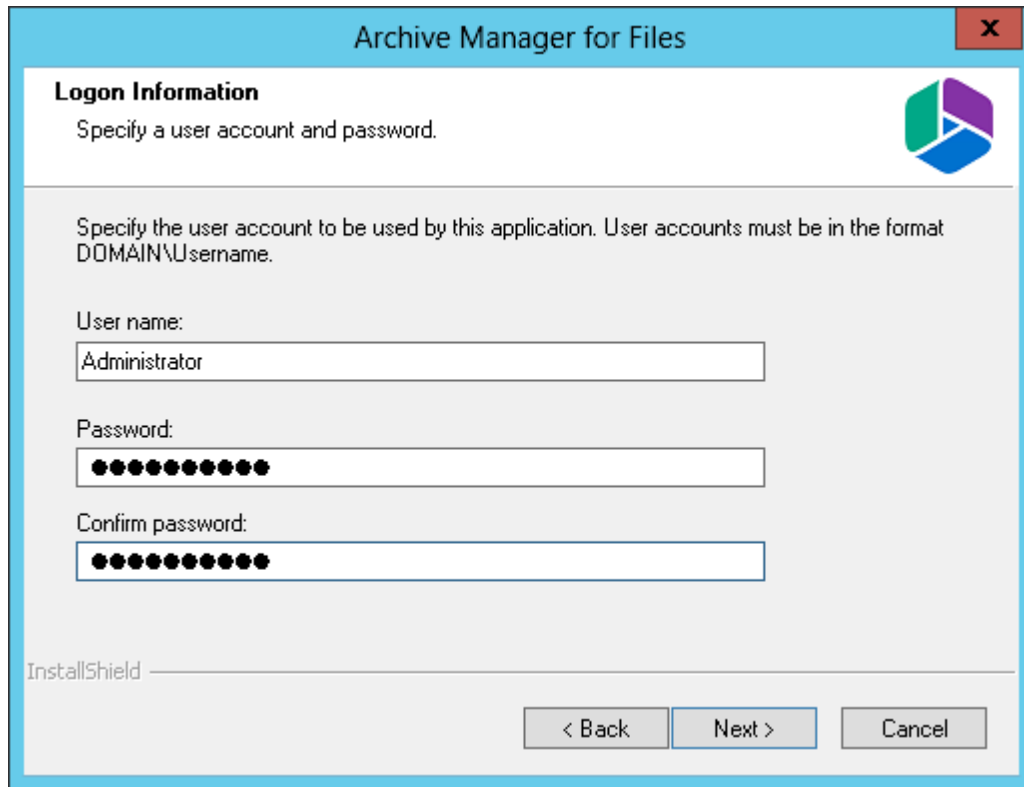
6. Now you need to enter the HSM server for Archive Manager and then click **Next**.



7. On this page please select the account that will be used for our services. This user account must be in the format DOMAIN\Username. Enter the password for this account and click **Next**.

This user account must have the appropriate DCOM rights on the fileserver to launch COM objects and must have full access to files and folders which are meant to be archived. We recommend using a local administrator account. In case that Archive Manager will be used for remote servers archiving as well, the user running the Archive Manager services must be granted full rights in the remote folders.

NOTE: The **Browse** button can be used to locate the desired user as well.



Archive Manager for Files

Logon Information
Specify a user account and password.

Specify the user account to be used by this application. User accounts must be in the format DOMAIN\Username.

User name:
Administrator

Password:
●●●●●●●●●●

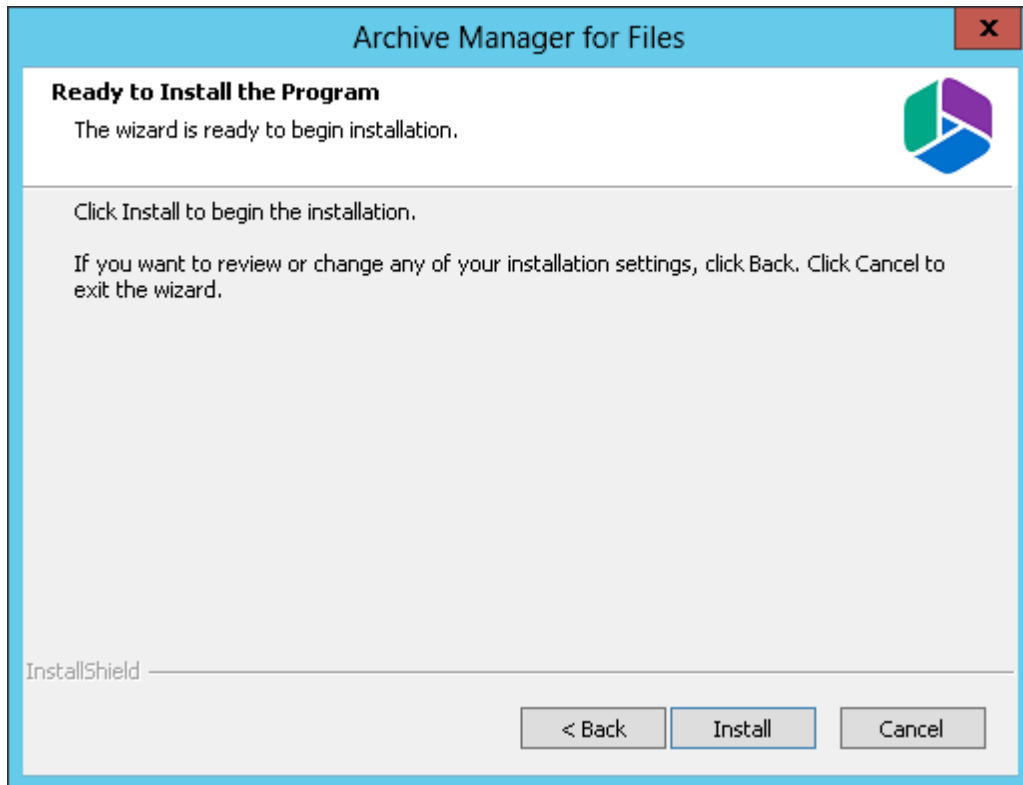
Confirm password:
●●●●●●●●●●

InstallShield

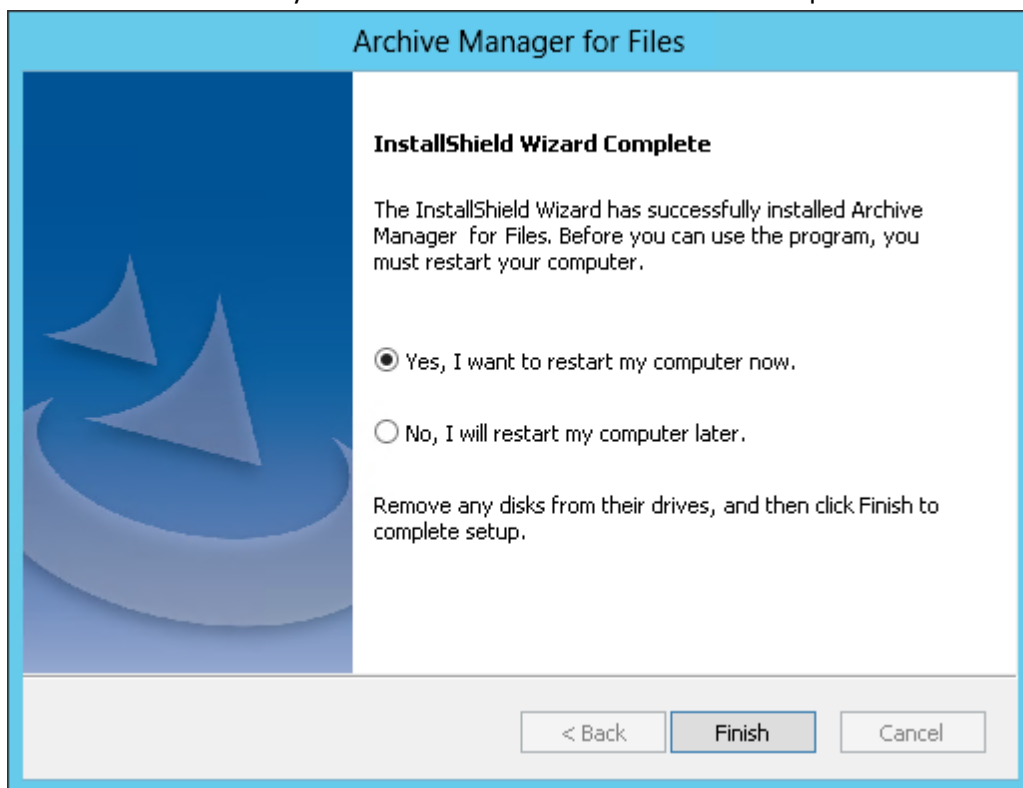
< Back Next > Cancel

8. If the Windows Firewall is on and enabled, it is necessary to allow HSM components to communicate through Windows Firewall. The components (COM+ Network access and HSM services) will be added to the Windows Firewall Exception list. Click Next.

9. Click **Install**.



10. In case of updating, if some of the components could not be updated as they are locked, restart will be necessary. Click **Next** and then select the desired option.



The next screen that pops up is the starting page for configuration of Archive Manager. Therefore we will describe further process in the next section (“Configuring Archive Manager for Files”), although the process flows continuously.

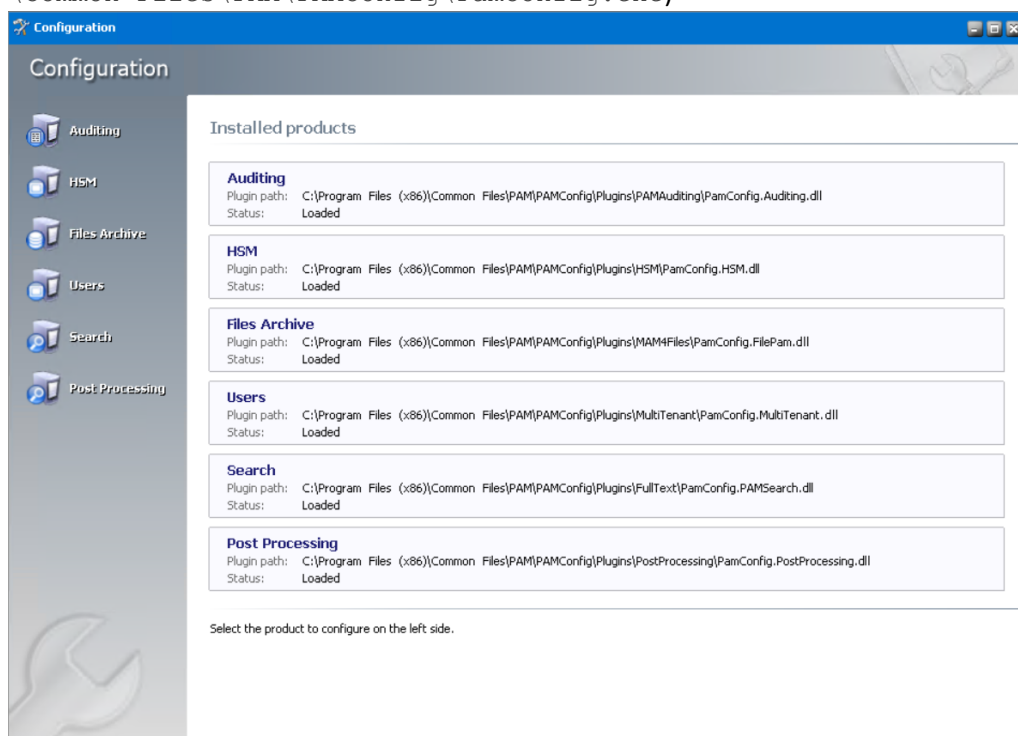
Configuring Archive Manager for Files

When installation of Archive Manager for Files is finished (see the previous section), simply continue with configuration. Archive Manager requires connection information to the database, so please enter the requested data as described below.

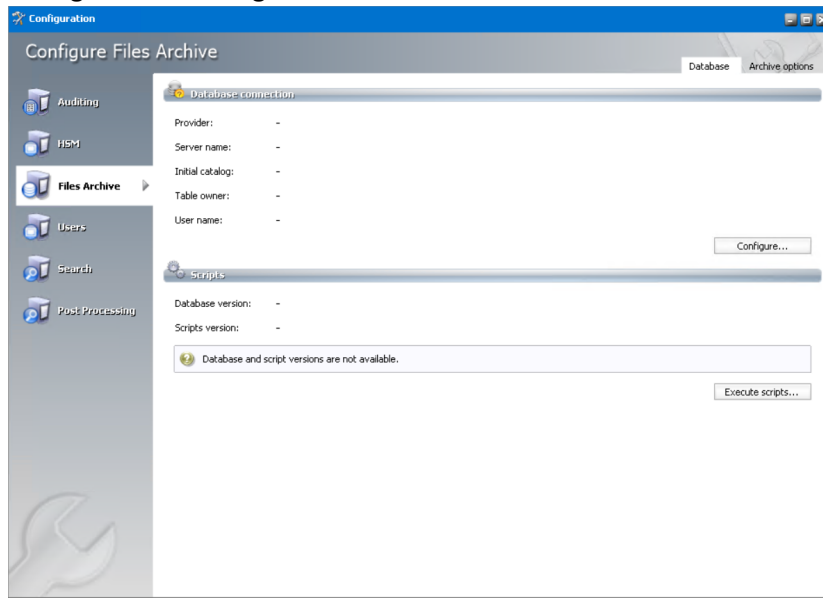
NOTE: In the **Configuration** tool you can see also other our products, if they are installed on your machine. However, for Archive Manager for Files you need to configure just the Files Archive part.

To configure Archive Manager for Files, follow these steps:

1. In the initial **Configuration** window select the **Files Archive** tab in the left pane. (The default location for the **Configuration** tool runtime is `C:\Program Files (x86)\Common Files\PAM\PAMConfig\PamConfig.exe`)

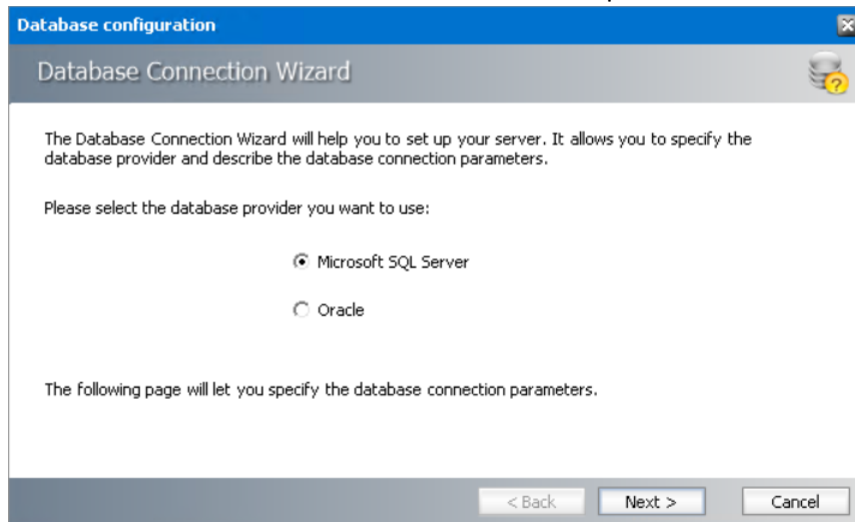


2. Click the **Configure** button to start the **Database Connection Wizard** and update the configuration settings.



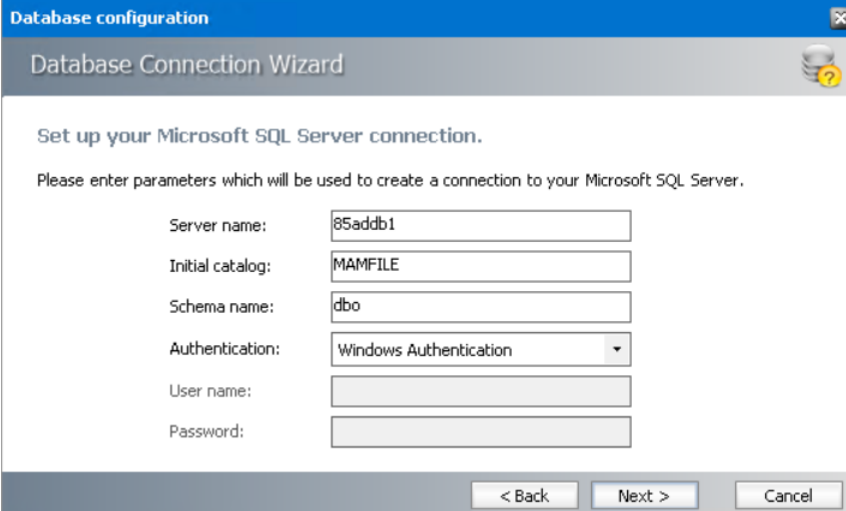
3. In the case that you are working with an MS SQL database, select the **Microsoft SQL Server** option and then click **Next**.

NOTE: For an Oracle database select the **Oracle** option.



4. On the next page please enter the requested data:
 - If you have selected **MICROSOFT SQL SERVER** in the previous window, fill in these fields:
 - Server name** (the name of your MS SQL server)
 - Initial catalog** (the name of the database for Archive Manager)
 - Schema name** (the name of the schema where Archive Manager tables will be created)
 - Authentication** (authentication type used for the database)
 - User name** (the database login name)

Password (enter the requested password)



Database configuration

Database Connection Wizard

Set up your Microsoft SQL Server connection.

Please enter parameters which will be used to create a connection to your Microsoft SQL Server.

Server name: 85adddb1

Initial catalog: MAMFILE

Schema name: dbo

Authentication: Windows Authentication

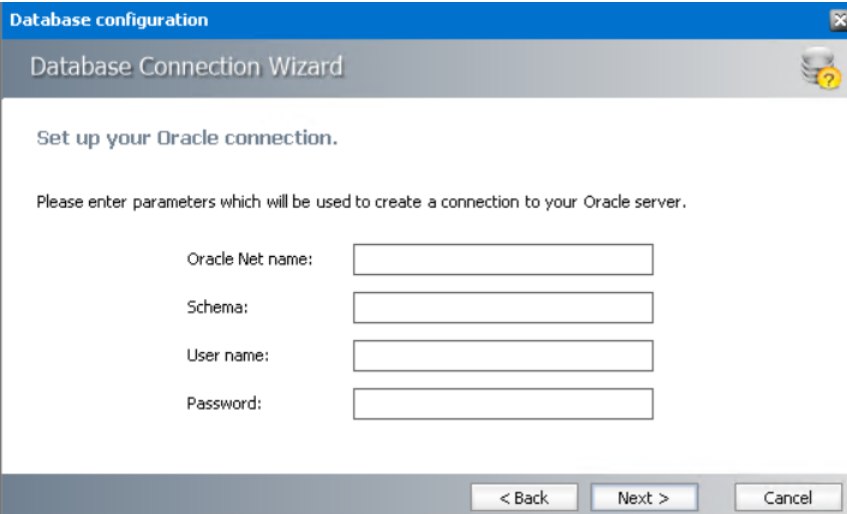
User name:

Password:

< Back Next > Cancel

- If you have selected **ORACLE** in the previous window, fill in these fields:
Oracle Net Name (ORACLE NET name, TNS name)
Schema (the name of the schema where Archive Manager tables will be created)
User name (log-on user for the database with read and write rights to the table)
Password (log-on user's password)

Afterwards, click **Next**.



Database configuration

Database Connection Wizard

Set up your Oracle connection.

Please enter parameters which will be used to create a connection to your Oracle server.

Oracle Net name:

Schema:

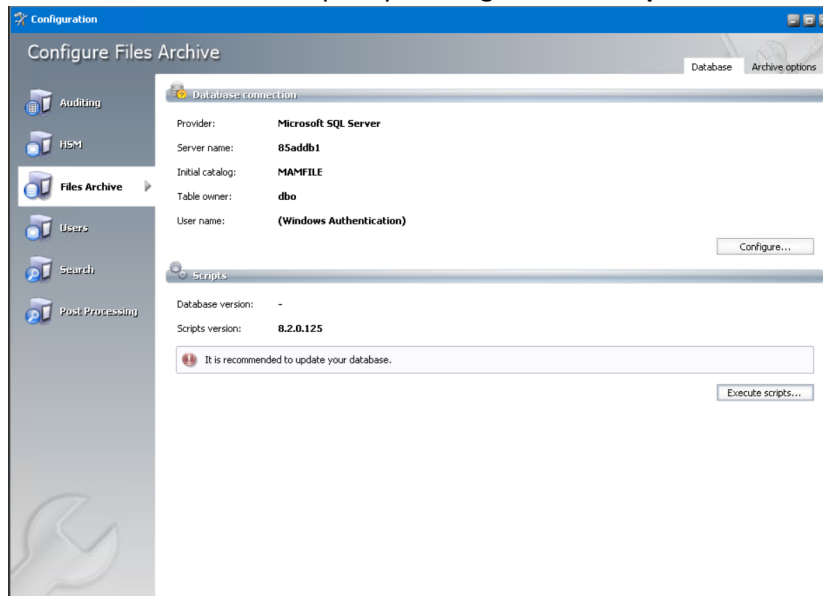
User name:

Password:

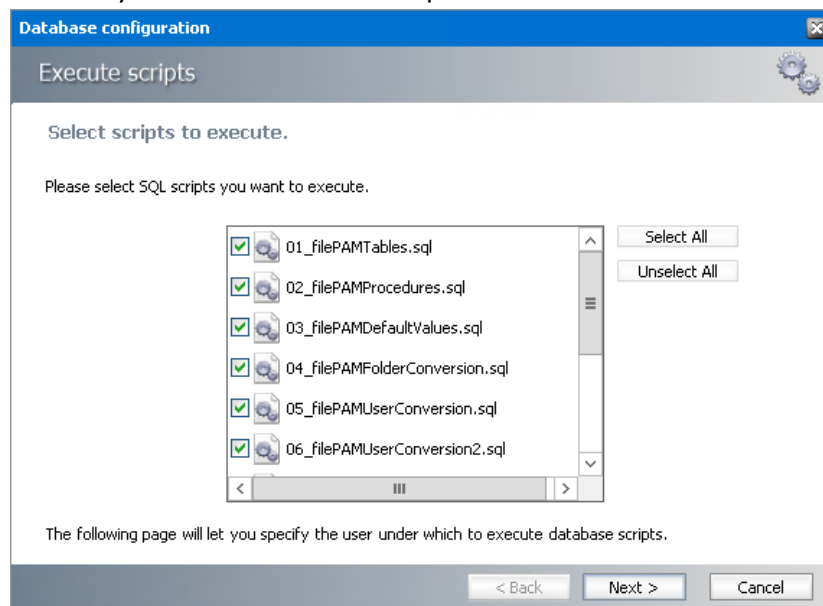
< Back Next > Cancel

5. Click the **Finish** button. Next, you will have to run the database scripts.

6. Back in the **Configuration** window on the **Files Archive** tab the data you have entered are now filled in. Run the scripts by clicking the **Run Scripts** button in the **Scripts** section.



7. In the following window click **Select All** button or select the scripts one by one. It is necessary to select and run all scripts. Then click **Next**.



8. In case of SQL server authentication, in the **Database user** text field enter the database user under which the scripts will be run. Enter the password in the **Password** field, if needed. Click **Next**.

NOTE: To see the scripts, check the **I want to review the SQL scripts** check box. On the following page you can read the scripts as well as save them.

Database configuration

Execute scripts

Specify the user under which to execute database scripts.

Please specify user under which to execute database scripts. The user must be allowed to create or modify tables and procedures in the database.

Authentication: SQL Server Authentication

Database user: pam

Password: *****

☐ I want to see the SQL script before execution (for advanced users)

< Back Next > Cancel

9. Click **Next** to run the scripts.

10. When the process has finished and all scripts were run successfully (indicated by the green sign), click **Finish**.

Database configuration

Execute scripts

Execute SQL scripts.

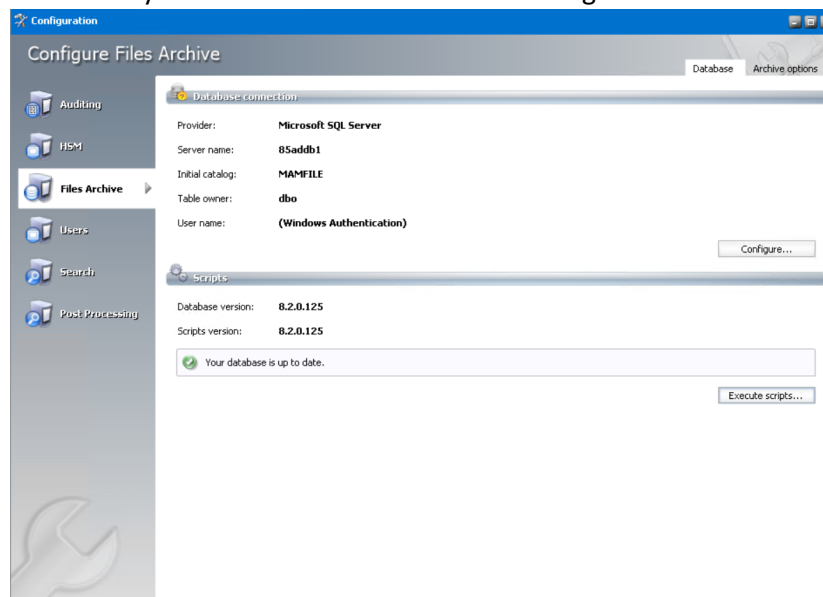
Here you can execute the selected SQL scripts to set up the database.

- ✓ 01_filePAMTables.sql
- ✓ 02_filePAMProcedures.sql
- ✓ 03_filePAMDefaultValues.sql
- ✓ 04_filePAMFolderConversion.sql
- ✓ 05_filePAMUserConversion.sql
- ✓ 11_PostProcesingTables.sql
- ✓ 12_PostProcesingProcedures.sql
- ✓ 13_PostProcesingDefaultValues.sql

There were some errors while executing SQL scripts. 00:00

< Back Next > Finish

11. Successful script operations will be indicated in the Scripts section of the Files Archive tab where you can read the bottom line message: *"Your database is up to date."*

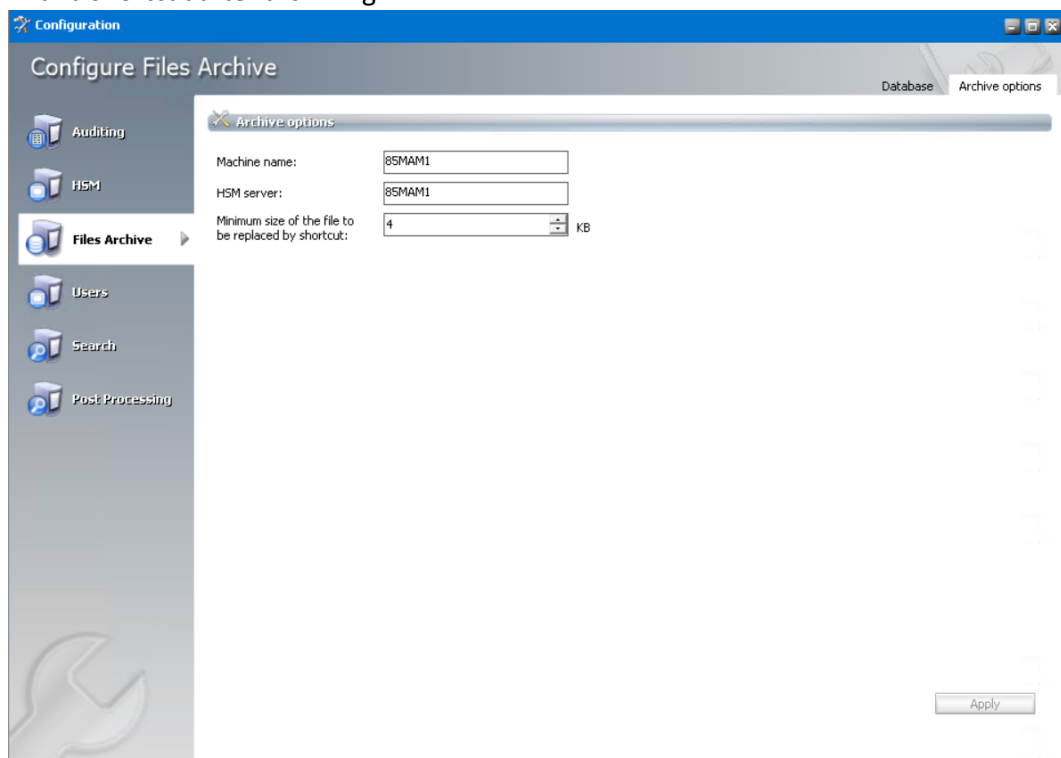


12. The **Archive options** tab by default does not need to be changed. It is filled in by default and configuration is necessary only for special purposes (e.g. changing the HSM server). It contains the following information:

Machine name – name of the machine where Archive Manager for Files is installed

HSM server – indicates the HSM server

Minimum size of the – identifies the minimum size of a file, which can be replaced with a shortcut after archiving



Installation of Archive Manager for Files is completed. Click **Finish** and you may start using **Enterprise Manager**.

Addendum

Remote HSM Server

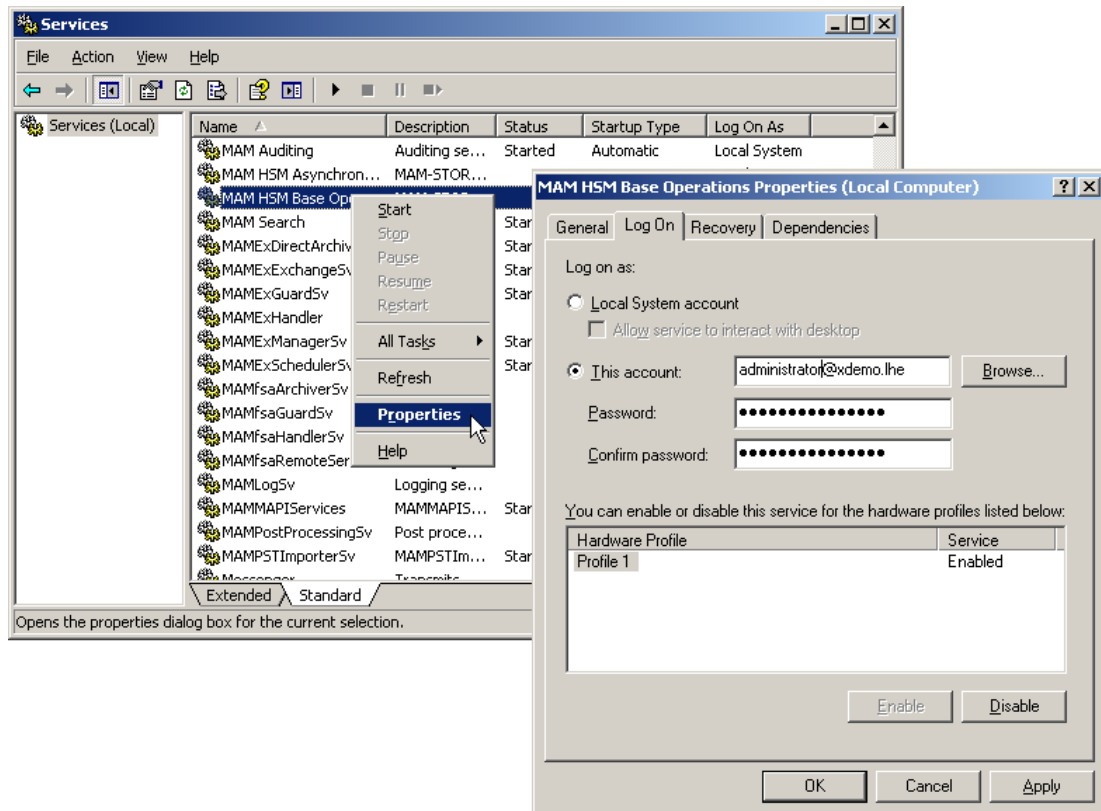
In case of a remote HSM Server, i.e. if the HSM Server is installed on a separate machine, it is necessary that:

- The *HSM Base service* runs under the Archive Manager super-user account
- DCOM Rights are reduced
- a) The Archive Manager super-user account is an account under which Archive Manager services (MAMfsaHandlerSv, MAMfsaRemoteSV, MAMfsaArchiverSv) run on the Archive Manager server.

On the HSM server, follow these steps:

1. **Open Start / Administrative tools / Services** and locate the *MAM HSM Base Operations service*.
2. **Right-click it and open its Properties.** On the **Log On** tab check **This account option** and enter the super-user account with its password. (Super-user account is an account which Archive Manager services (MAMfsaHandlerSv, MAMfsaRemoteSV, MAMfsaArchiverSv) run under.)

Finally click **OK**.



b) DCOM Rights has to be reduced in two locations to

- AuthenticationLevel="None"
- ImpersonationLevel="Anonymous"

and after that the IIS have to be reset.

On the HSM Server follow these steps:

1. Open machine.config from:
C:\WINDOWS\Microsoft.NET\Framework\v2.0.50727\CONFIG\machine.config
In case the 64-bit .NET Framework open:
C:\WINDOWS\Microsoft.NET\Framework64\v2.0.50727\CONFIG\machine.config

2. Locate the entry for "processModel" and add:

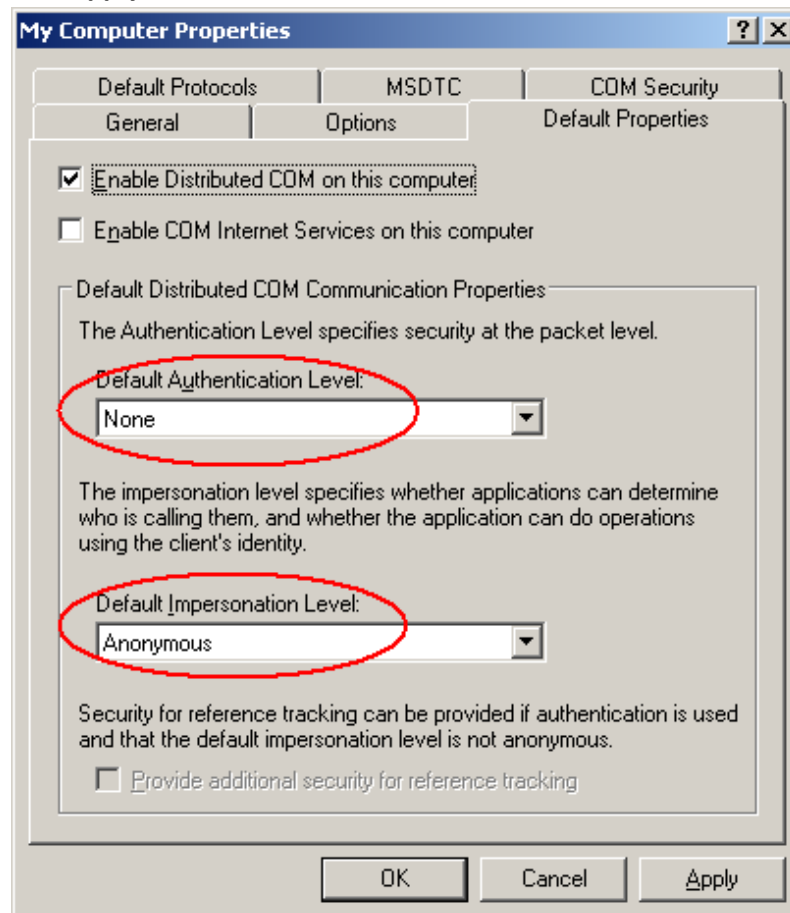
`comAuthenticationLevel="None" comImpersonationLevel="Anonymous"`

The entry then looks as follows:

```
<processModel autoConfig="true" comAuthenticationLevel="None"
comImpersonationLevel="Anonymous" />
```

3. Close the config.
4. Now run **Component Services** (click **Start /Settings /Control Panel /Administrative Tools /Component Services**).

5. In the **Component Services** window expand the **Component Services** tree down to **Component Services \Computers \My Computer** and then right-click **My Computer** to open its **Properties** window.
6. Switch over to the **Default permissions** tab. Check **Enable Distributed COM on this computer**. Then in the Default Authentication Level dropdown box select **None** and in the Default Impersonation Level select **Anonymous**. Click **Apply**, then **OK**.



7. Finally reset IIS.

Troubleshooting: Adobe reader X is not able to open archived PDFs

Problem description:

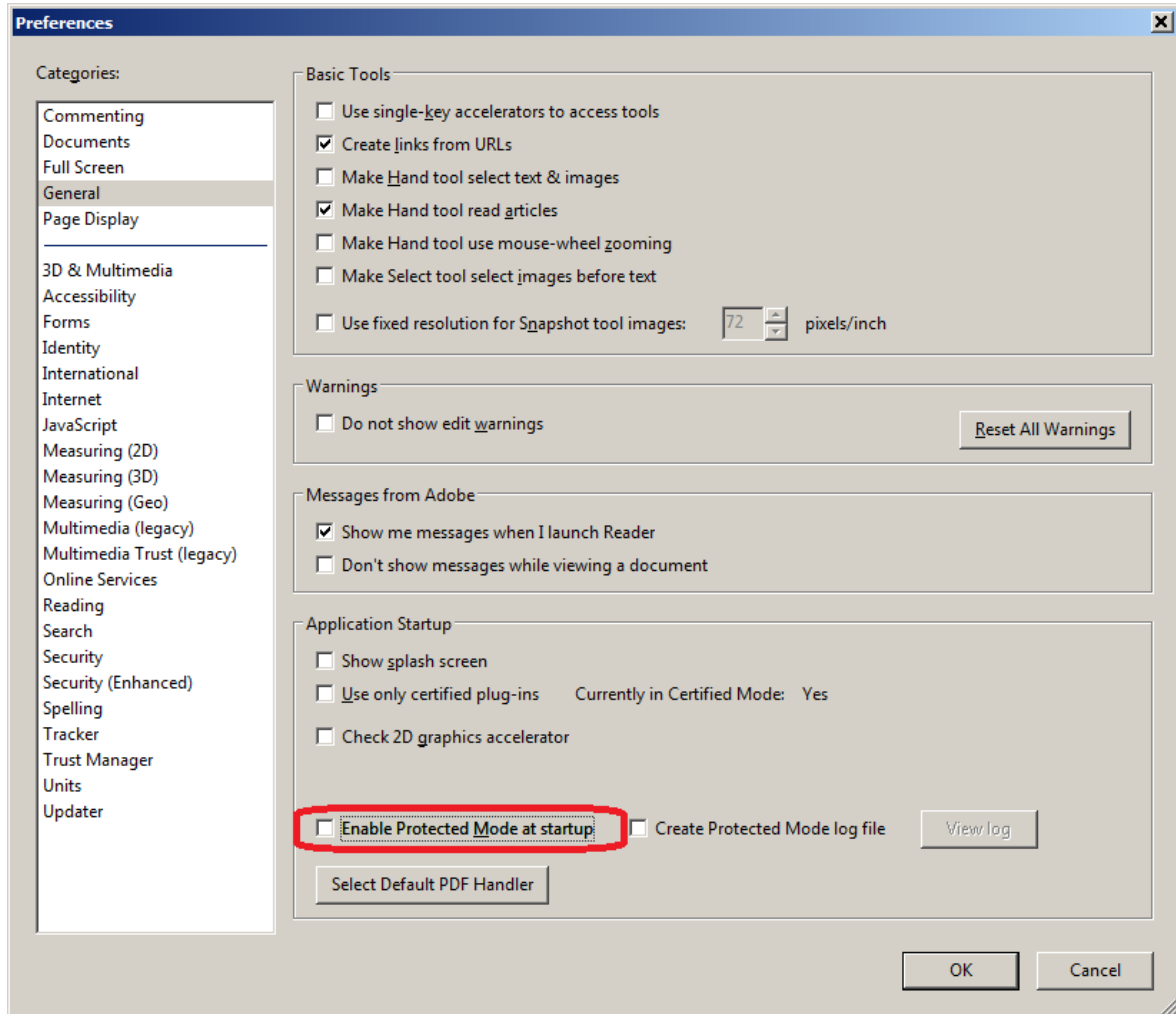
PDF files changed to shortcuts by Archive Manager are not retrievable by Adobe Reader X. The files could be opened without any obstacle if an older version of Adobe or any other PDF viewer is used.

Solution:

Protected Mode - new security feature of Adobe Reader X - has to be turned off. Protected Mode protects users' applications and data by limiting what malicious files can do and access. It

seems it is taking files having the Reparse Point attribute set as a “malicious” file. Protected Mode is enabled by default.

If you are having the problem described above, simply disable protected mode manually in Adobe Reader by choosing **Edit > Preferences > General** tab and unchecking **Enable Protected Mode** on startup.



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- Sign up for product notifications
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- Engage in community discussions
- Chat with support engineers online
- View services to assist you with your product