



Metalogix<sup>®</sup> Archive Manager for Exchange 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 Exchange

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# Introduction

Metalogix Archive Manager for Exchange provides the most flexible and effective way to collect, archive, search and secure all you organization's email from one central location. You can control the retention policy of archived emails by moving emails to inexpensive locations as their relevance changes with the option to delete old messages unless they are on legal hold. With robust version control, any previous version of an archived email can be restored at any time along with its attachments. Metalogix Archive Manager for Exchange also offers online management of archived emails, as well as mobile and offline email access to users on the road.

The *primary* features of Metalogix Archive Manager for Exchange and HSM are as follows:

- **Archive Manager for Exchange** - email archiving engine that includes the windows services and the Archive Manager for Exchange Administration Center (AMAC). Archive Manager for Exchange has the following components:
  - *Application Server* - contains the core functionality of the Archive manager for Exchange.
  - *Administrative tool* - installs the Archive Manager for Exchange Administration Center (AMAC). The AMAC can be installed as a standalone application on other computers as well and allows several administrators to manage Metalogix Archive Manager for Exchange deployment.
  - *PST Importer* - installer files for the PST Importer feature which import and archives emails from PST files. PST Importer can be set up to work with the *PST Gatherer* feature that runs either as an application or a service. It assists users with gathering PST files that are stored in distributed locations like network shares in addition to local drives.
  - *Forms Installer* - installer files and template which are used to publish Archive Manager forms to the *Organizational Forms Library* or the *Personal Forms Library*. It can only be used on a computer where Outlook is running.
  - *Auditing* - allows administrators to log defined user actions in the email archive like archiving, retrieving, restoring and search history that were initiated from Outlook or ArchiveWeb. This feature can be installed on the Archive Manager for Exchange server or on a separate machine.
  - *Monitoring service* - Monitors other Archive Manager services and alerts the administrator via notification email if necessary. Notification emails are sent only if an error occurs.
  - *Documentation* - Offline documentation about the product.
- **Hierarchical Storage Manager (HSM)** - a data storage system for managing your email archive store as well as all company data on one or more file-servers. HSM ensures that files with identical content are stored only once regardless of where the original file is located.

The following *optional* features are integrated with the Metalogix Archive Manager for Exchange product installer:

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

The following *optional* features are included as separate installers in the download package:

- **Archive Manager for Exchange OWA Extension** - feature that is installed on the Microsoft Exchange Server to provide Outlook Web Access (OWA) for archived emails to end-users.
- **Archive Manager Universal Access** - allows mobile users, Mac users and Linux users to work with archived emails.
- **Archive Manager SMTP Service** - enables processing of messages from an external email server (O365, Gmail, Exchange, etc.) into Metalogix Archive Manager for Exchange.
- **Archive Manager Outlook Addin** - gives authorized users the ability to archive and restore emails with the Outlook desktop client.
- **Archive Manager PST Gatherer Setup** - automated extension to PST importer.

This advanced install guide describes the installation of the primary features of Metalogix Archive Manager for Exchange in a distributed environment. To enable load balancing and redundancy for large email volumes, Metalogix Archive Manager provides you with the ability to configure several Archive Manager servers. You can add additional features as required.

## About the email archive and retrieval process

When emails are archived, Metalogix Archive Manager for Exchange uses shortcuts to replace archived emails in the on-premise or online Microsoft Exchange mailboxes. Email shortcuts require very little space, reducing your email storage by up to 80% and email backup time by 50%. Messages remain available to end-users who can work with them as usual. This helps your end-users access all their data while reducing the need to set mailbox quotas and removing the dependency on PST files.

When a user clicks a shortcut to an archived email, Archive Manager for Exchange passes the information from the shortcut to HSM which restores the email from the store.

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.

# System Requirements

The requirements described below are applicable for installing the Metalogix Archive Manager for Exchange application components, and are compatible with the following Microsoft Exchange servers:

- Microsoft Exchange Server 2013
- Microsoft Exchange Server 2016
- Microsoft Exchange Server 2019
- Microsoft Office365 (Exchange Online)



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

## Hardware

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



**NOTE:** The application, log files and cache folders require 10 GB of HDD space. If the Archive Manager for Exchange server includes the database, and is used as a local storage for archived messages as well, then the the Hard Disk size must be revised upwards 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 or later
    - ASP.NET 3.5
    - ASP.NET 4.5 or later
  - 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

**i** | **NOTE:** Ensure that PowerShell can communicate between the Archive Manager server and the Exchange server and between the Archive Manager server and the domain controller

- .NET Framework 3.5 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++ 2017 Redistributable Package (x64)
- Microsoft Visual C++ 2017 Redistributable Package (x86)

## Microsoft Outlook

The table below identifies the mail clients that are supported for use together with each version of Exchange. Supported clients are identified by a check mark (✓)

Client	Exchange 2019	Exchange 2016	Exchange 2013 SP1 and later
Office 365	✓	✓	✓
Outlook 2019 (32-bit)	✓	✓	✓
Outlook 2016 (32-bit)	✓ <sup>1</sup>	✓ <sup>1</sup>	✓
Outlook 2013 (32-bit)	✓ <sup>1</sup>	✓ <sup>1</sup>	✓

**i** | **NOTE:** 1 - Supported with the latest Office service pack and public updates.

## 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

## **Additional Information**

- Installation of Metalogix Archive Manager application components on a Microsoft Exchange Server or Domain Controller are not supported.
- The software installs web applications in 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 Exchange is fully supported in a virtualized environment.

# Deployment Plan

The advanced installation of Metalogix Archive Manager for Exchange is used by large organizations that deploy a distributed server topology to increase the efficiency and throughput of email archival and retrieval. In the illustration below, a conceptual distributed deployment plan is presented in a single domain called *democorp.com* that is managed by a domain controller labeled **AMXDC**.

In this domain, there is a single on-premise Microsoft Exchange server labeled **AMXEXCH** that manages the communication for all users and groups in the domain. Users have access to an online Exchange server (O365) as well, labeled *democorp.onmicrosoft.com* that has a separate active directory which may or may not be integrated with the on-premise active directory. An optional feature called *Archive Manager for OWA Extension* can be installed on the on-premise Exchange server so that users can view regular and archived emails online.

The servers that comprise the distributed topology of Metalogix Archive Manager for Exchange are labeled for ease of reference, and will be used throughout this guide to describe the preparation, installation, configuration, and verification of the deployment.

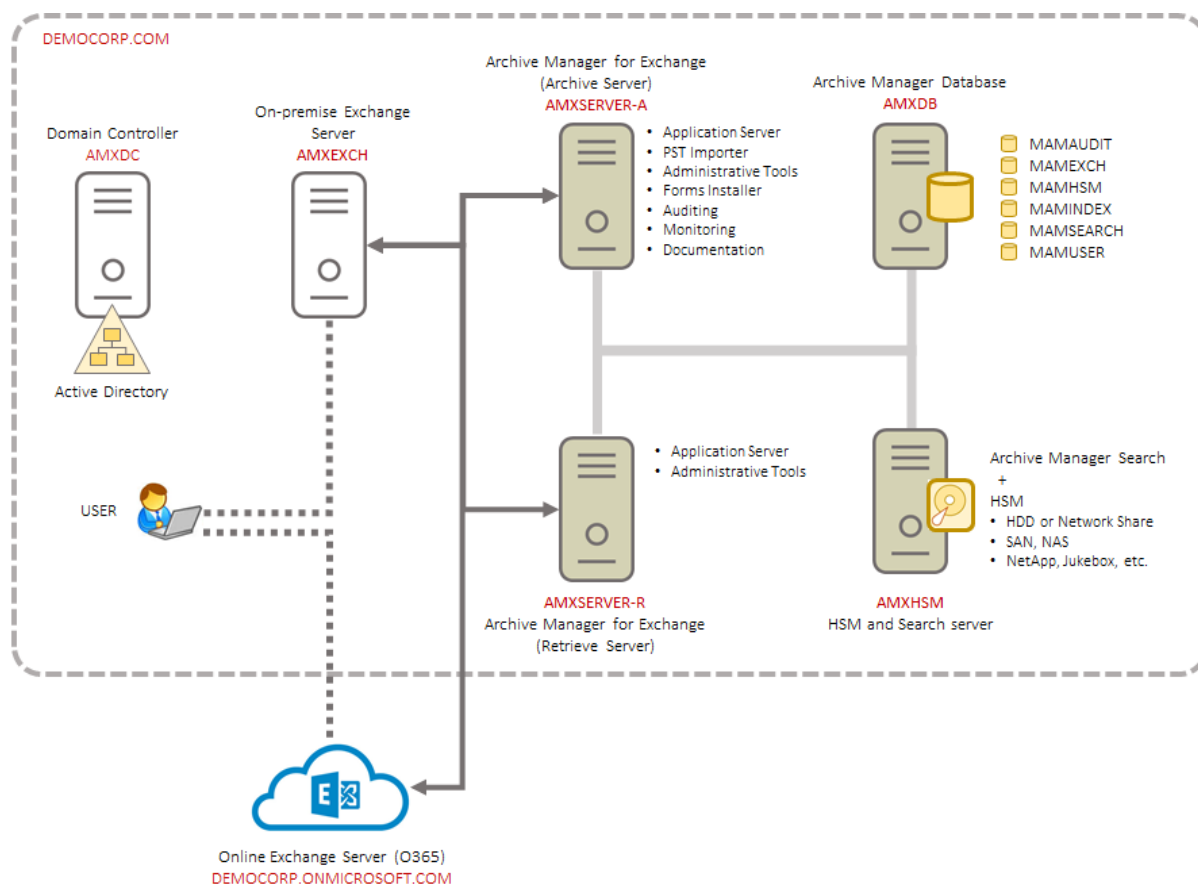


Figure 1. Topology for a distributed deployment of Metalogix Archive Manager for Exchange

The roles of the different servers are explained below:

### AMXDB

This is a dedicated database server that hosts the various databases that are used by the Metalogix Archive Manager for Exchange features to manage the archival and retrieval of emails. A single database server can host all the databases used by Metalogix Archive Manager for Exchange. Organizations that have email volumes in excess of one million, are advised to distribute the databases across dedicated database servers as follows: MAMEXCH for the Archive Manager for Exchange feature, MAMAUDIT for the *Auditing* feature of Archive Manager for Exchange, and MAMHSM, MAMINDEX and MAMSEARCH for the HSM and Archive Manager Search features.

### AMXHSM

This server hosts two features of the Metalogix Archive Manager for Exchange: the **Hierarchical Storage Manager (HSM)** and **Archive Manager Search**.

HSM is a data storage system for managing archived emails and files. HSM can manage a larger network of servers in organizations that use dedicated file servers. When the Archive Manager for Exchange server (AMXSVR-A) sends emails to HSM, they are immediately compressed and archived. When a user requests an archived email, HSM immediately decompresses the archived email and returns it to the Exchange server where the request originated, through the Archive Manager for Exchange server (AMXSVR-R). The Exchange server returns the email to the user.

Archive Manager Search is a full text search engine capable of searching archived emails and files. To increase the search efficiency archived emails are indexed. Users can search emails in their mailboxes and folders. Users can search the mailboxes and folders of other users as well if they have the requisite permissions.

### AMXSVR-A

This server hosts the **Archive Manager for Exchange** application server with the *Archive Server* role that defines the dedicated archival function of this server. This server is commonly called the **Archive** server.

### AMXSVR-R

This server hosts the **Archive Manager for Exchange** application server with the *Retrieve Server* role that defines the dedicated retrieval function of this server. This server is commonly called the **Retrieve** server.



---

# About User Accounts

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

**Installer account** - Enterprise user account that has administrator access to the various servers and is used to install the application features.

**Superuser account** - Domain user account that is used to run the windows services, and administer the application. The superuser account needs additional privileges and configuration to be able to communicate with the Microsoft Exchange Server. The advanced installation wizard manages all the setup and configuration steps that are required, but if you choose to do a manual installation, see [Manual Installation](#) for a summary of steps to setup a superuser.

**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 Exchange 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 Exchange 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 Exchange and associated features on dedicated servers as described in the [Deployment Plan](#). 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](#).

In this chapter:

- [Setup the Superuser Account](#)
- [Prepare the Application Servers](#)
  - [Steps to download the install media](#)
  - [Steps to install the prerequisites](#)
  - [Steps to install Microsoft Outlook](#)
- [Install the Application Features](#)
  - [Install HSM and Archive Manager Search](#)
  - [Install Archive Manager for Exchange \(Archive server\)](#)
  - [Install Archive Manager for Exchange \(Retrieve server\)](#)

For next steps after you complete the advanced installation, see [Application Configuration](#).

## Setup the Superuser Account

A *superuser* account is a windows account with administrator privileges to work with Metalogix Archive Manager for Exchange administration tools, run services, manage databases, manage extensions. It also has elevated privileges to interact with the on-premise or online Microsoft Exchange servers.

In this topic:

1. [Steps to create the superuser account](#)
2. [Steps to add the superuser to the Administrators group of the servers](#)

3. [Steps to add the superuser as a database user with sysadmin role](#) (for Windows authentication only)

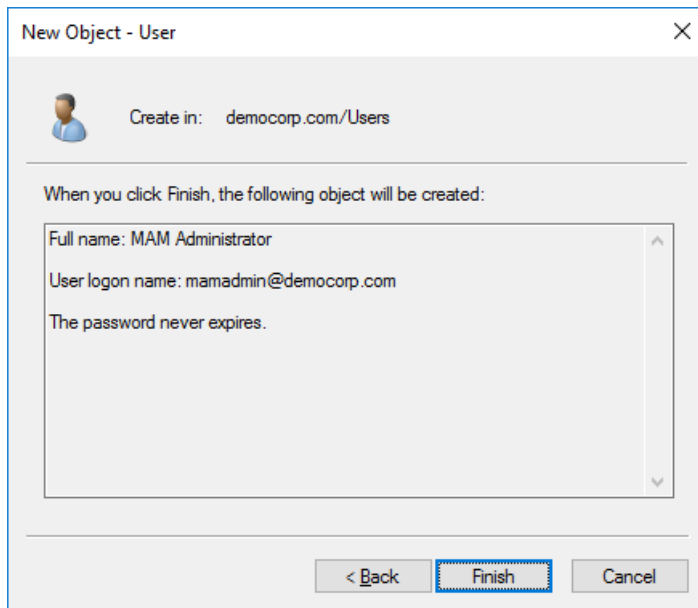
**i** **NOTE:** There are more configuration steps necessary to grant elevated permissions to the superuser. When you use the *Advanced Installation* option from the Metalogix Archive Manager for Exchange installation wizard, all the other configurations are automatically completed for you. For the complete set of configuration steps, see [Setup the Superuser Account](#) in the manual installation chapter of this guide.

## Steps to create a superuser account

1. Log in to the domain controller.
2. Navigate to **Start > Windows Administrative Tools > Active Directory Users and Computers**.
3. From the *Console Tree*, expand the domain node.
4. Click the **Users** container. The list of users opens in the right-hand pane.
5. Click the **Action** menu and select **New > User**. The *New Object - User* window opens.

The screenshot shows the 'New Object - User' dialog box. At the top, it says 'Create in: democorp.com/Users'. Below this are several input fields: 'First name' with 'MAM', 'Initials' (empty), 'Last name' with 'Administrator', 'Full name' with 'MAM Administrator', 'User logon name' with 'mamadmin' and a dropdown menu set to '@democorp.com', and 'User logon name (pre-Windows 2000)' with 'DEMOCORP\'\'mamadmin'. At the bottom, there are three buttons: '< Back', 'Next >', and 'Cancel'.

6. Verify that **Create in** title indicates the appropriate domain name and container, and then enter the details of the superuser. For example:
  - a. Full name: **MAM Administrator**
  - b. User logon name: **mamadmin@democorp.com**
7. Click **Next**.
8. Enter the password and confirm it. Then select **Password never expires**. Uncheck all other check boxes.
9. Click **Next**.

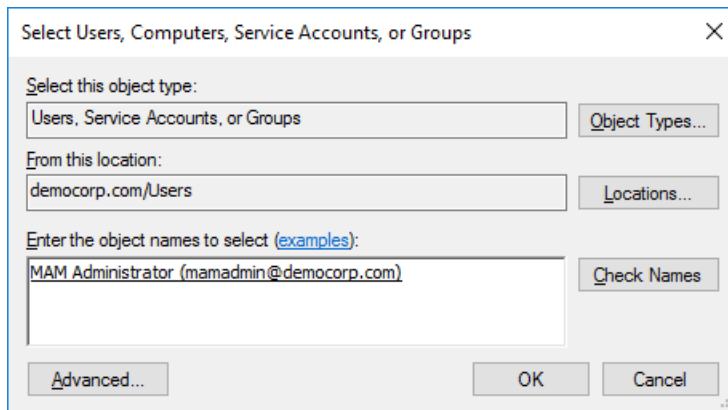


10. Verify the information and click **Finish**.

## Steps to add the superuser to the Administrators group of the servers

The superuser must be able to run windows services and accomplish tasks that require administrator privileges on the Metalogix Archive Manager for Exchange feature servers. Follow the steps described below to grant administrator privilege to the superuser on each feature server.

1. Log in to each server with its local administrator credentials.
2. Navigate to **Start > Windows Administrative Tools > Computer Management**
3. From the Console Tree, navigate to the **System Tools > Local Users and Groups > Groups** container.
4. From the list of groups in the right-hand pane, right-click **Administrators** and select **Properties** from the context menu. The *Administrators Properties window opens.*
5. Click **Add**.
6. In the **Enter the object name to select** field, enter the user logon name of the super user. For example, enter sales\mamadmin
7. Click **Check Names** to verify the logon name.



8. Click **OK** to add the superuser to the Administrator group.
9. In the *Administrators Properties* window, click **Apply** and **OK** to complete the process.

**i** **TIP:** Log out of the server and log in again with the superuser's credentials to quickly verify that the superuser can access the server.

## Steps to add the superuser as a database user with sysadmin role

If you plan to use *Windows authentication* with a Microsoft SQL Server database, follow the steps described below:

1. Log in to the database server with your database administrator credentials.
2. Open the SQL Server Management Studio on your SQL server database server.
3. Log in to the server instance for Metalogix Archive Manager for Exchange databases.
4. Open the **Security** folder.
5. Right-click on the **Logins** folder and select **New Login**. The *Login - New user* properties window appears.
6. If you want to assign rights to a Windows account, select **Windows authentication**.
7. Provide the login name in the text box. You can use the **Browse** button to select an existing account if you chose Windows authentication (eg. **democorp\mamadmin**)
8. In the user properties window, click **Server Roles** from the *Select a page* panel and select the check box **Sysadmin**.
9. Click **OK** to create the account.

**i** **NOTE:** Follow the above steps to add the installer account (eg. **democorp\domadmin**) with the **Sysadmin** role.

# Prepare the Application Servers

## For the Archive Manager Database server (AMXDB)

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

## For the HSM and Search server (AMXHSM)

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

## For the Archive server (AMXSERVER-A)

- [Steps to install the prerequisites](#)
- [Steps to install Microsoft Outlook](#)
- [Steps to download the install media](#)

## For the Retrieve server (AMXSERVER-R)

- [Steps to install the prerequisites](#)
- [Steps to install Microsoft Outlook](#)
- [Steps to download the install media](#)

# 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 Exchange (for Archive and Retrieve servers)**

```
Install-WindowsFeature -Name Web-Server, Web-Http-Redirect, Web-Dyn-Compression, Web-Windows-Auth, Web-Basic-Auth, Web-Metabase, Web-Mgmt-Service, RSAT-AD-PowerShell, 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](#) 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 install Microsoft Outlook

The Metalogix Archive Manager Server communicates with on-premise and online Microsoft Exchange servers via MAPI. To provide your Archive Manager server with a MAPI subsystem, install Outlook with full Unicode compatibility. See [System Requirements](#) for version compatibility with your Microsoft Exchange servers.

## Steps to download the install media

1. Login to the server with the credentials of the **superuser** (eg. **democorp\mamadmin**)
2. From your browser, navigate to the <https://www.quest.com/products/metalogix-archive-manager-for-exchange> page  
or  
navigate to the <http://www.quest.com/trials> page. Locate the product Metalogix Archive Manager for Exchange.
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 Exchange features.



# Install the Application Features

## For HSM and Search server (AMXHSM)

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

[Install HSM and Archive Manager Search](#)

## For Archive server (AMXSERVER-A)

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

[Install the Archive server](#)

## For Retrieve server (AMXSERVER-R)

[Install the Retrieve server](#)

# Install HSM and Archive Manager Search

In this topic:

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

## Worksheet for this installation

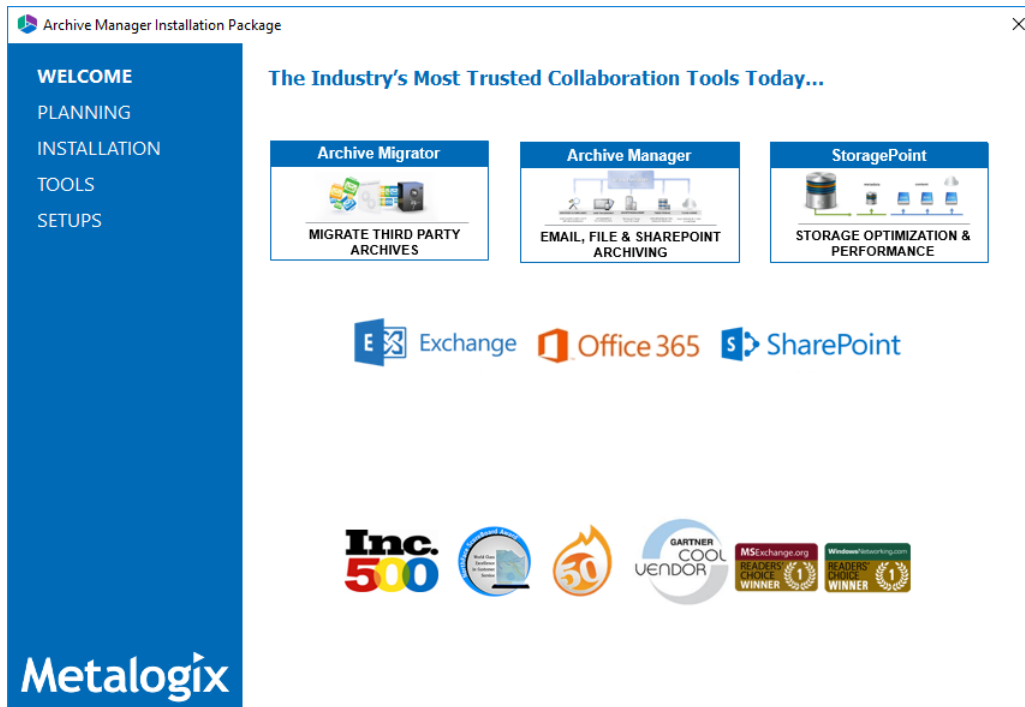
The following information will be required through the installation process. Sample values are provided here as a guidance.

Item	Description	Example
HSM server	The server where the HSM and Archive Manager Search will be installed.	AMXHSM
Installer account	Windows account that is used to install the application. This is usually the enterprise administrator.	username: democorp\domadmin  password: *****

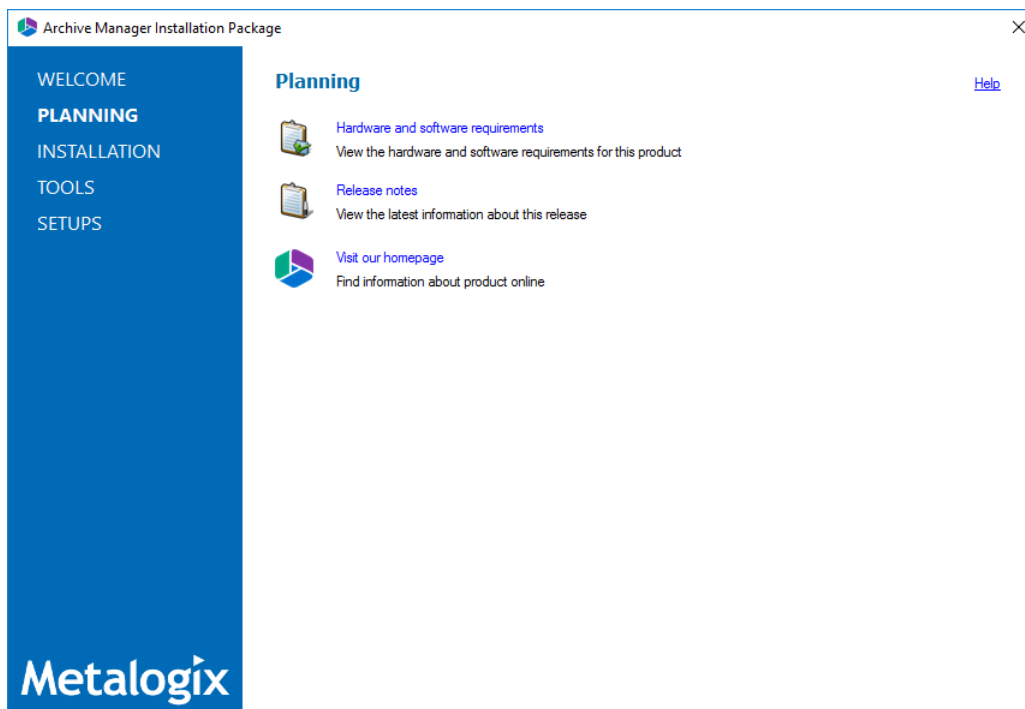
Superuser account	Windows account that is used to install the application and run the Archive Manager for Exchange services.	username: democorp\mamadmin  password: *****
Media Folder	Full path of the folder where the media files are extracted	C:\Metalogix
Installation folder	Full path of the folder where 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.	AMXDB

## Steps to install HSM and Archive Manager Search

1. Log in to the server with the credentials of the **enterprise administrator** (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.

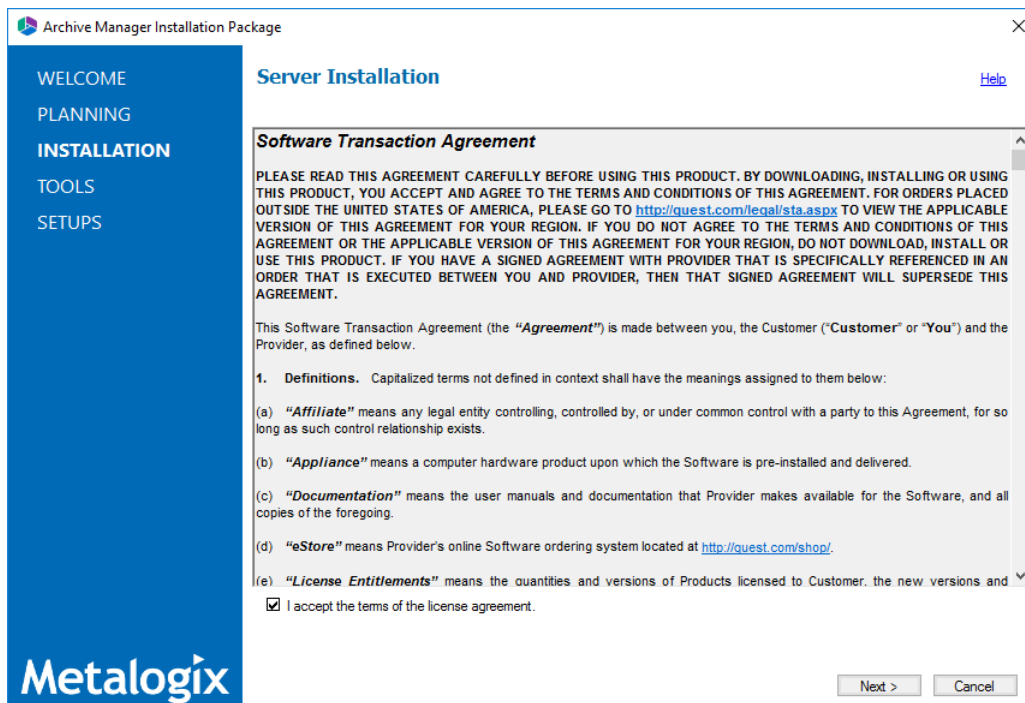


4. From the navigation panel on the left, click **PLANNING**. The *Planning* window opens.



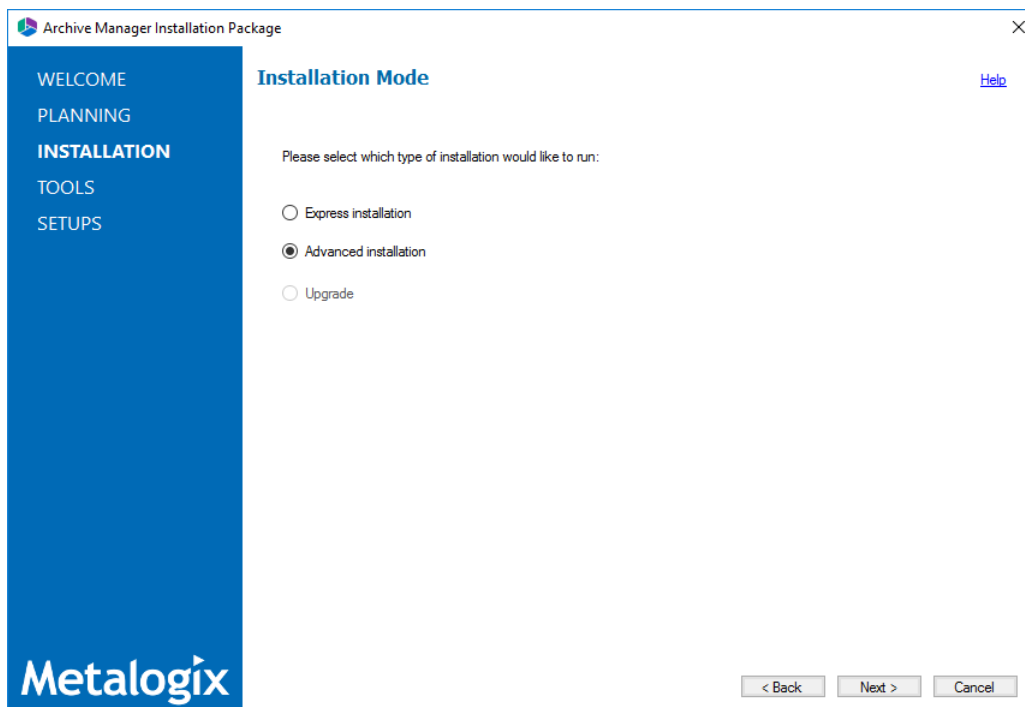
Review the requirements and release notes. If necessary, visit the Quest website for more information.

5. From the navigation panel on the left, click **INSTALLATION**. The *Server Installation* window opens.

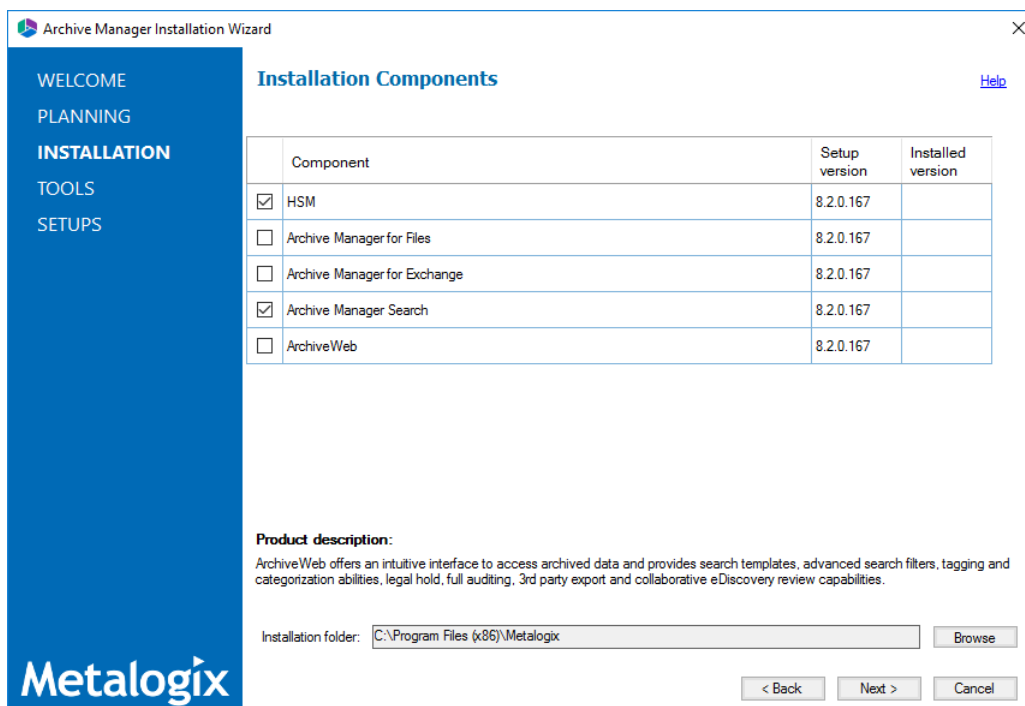


Read the **Software Transaction Agreement**. If you wish to proceed, select the **I accept the terms of the license agreement** check box.

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

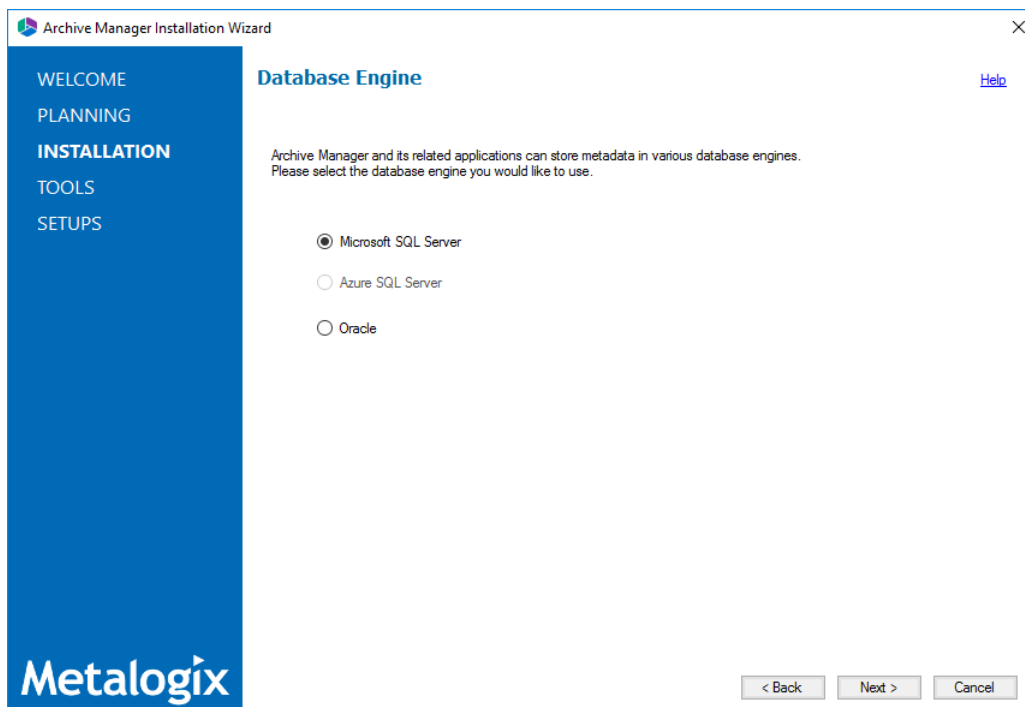


7. Click **Next**. The *Installation Components* window opens.



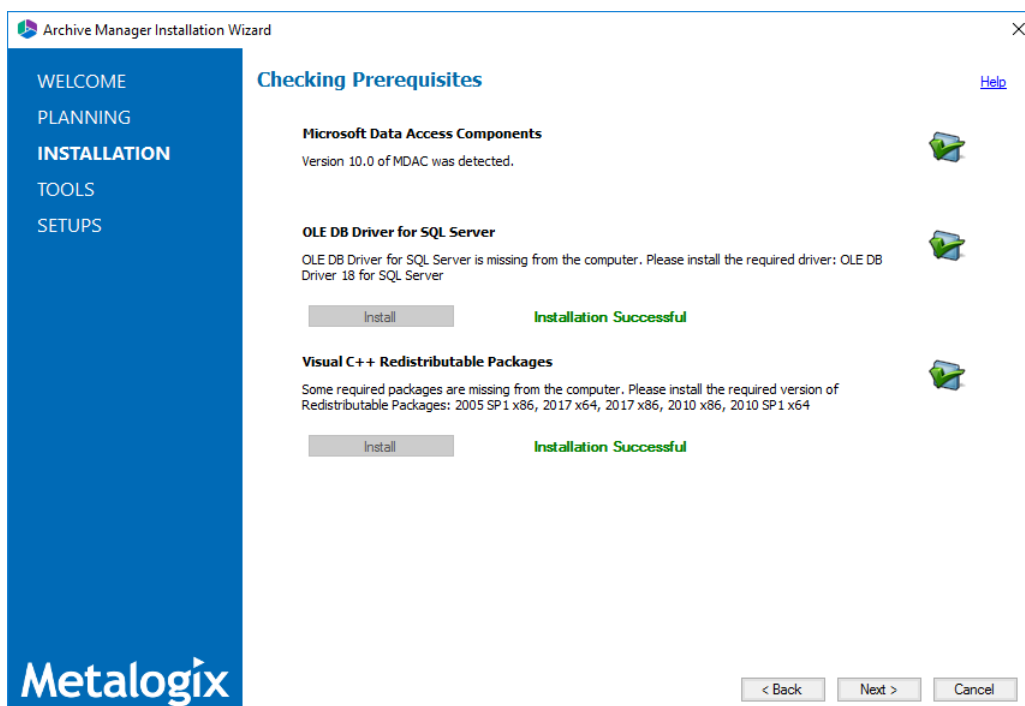
Select **HSM** and **Archive Manager Search**.

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



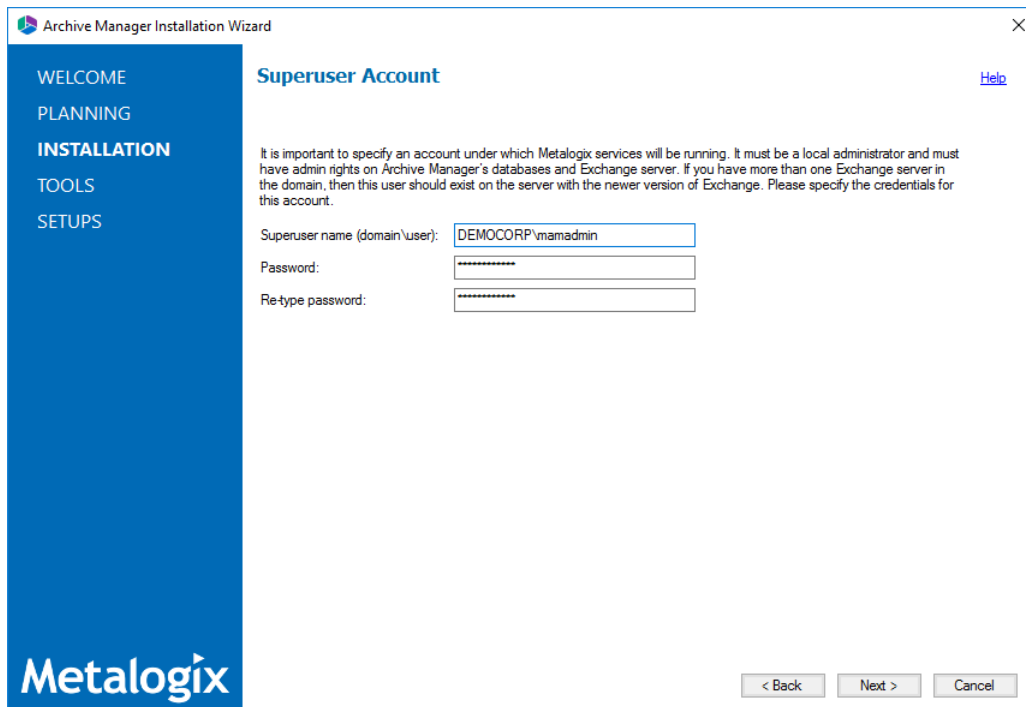
Select either **Microsoft SQL Server** or **Oracle**.

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



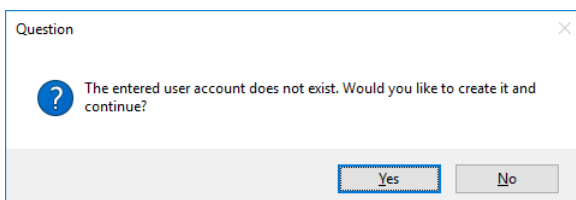
If one or more prerequisites are missing, the **Next** button is disabled. Click **Install** to install each prerequisite.

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



Specify the **Superuser name** and **Password**. Enter the password again in the **Retype 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**.

Archive Manager Installation Wizard

WELCOME  
PLANNING  
**INSTALLATION**  
TOOLS  
SETUPS

**Database Server Connection** [Help](#)

Please fill in all values which will be used to create a connection to your Database Server.

Component	DB Server
<b>HSM</b>	<b>MSSQL</b>
Archive Manager Search	MSSQL
Archive Manager Post-Processing	MSSQL

**Authentication**

Authentication: Integrated Windows Authentication

UserLogin:   
Password:   
  
**Server Instance**

TableOwner: dbo  
ServerName: **AMXDB**  
DatabaseName: **MAMHSM**  
Provider: MSOLEDBSQL

**ServerName**  
Database instance server name

MetaLogix

< Back Next > Cancel

**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.
- DatabaseName** - The name of the database that will contain the HSM metadata. The default name is **MAMHSM**.
- 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.



- SQLOLEDB - 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*

- Oracle net name** - net service name that describes the network address of the database server in your `tnsnames.ora` file.
  - Schema** - name of the Oracle schema from your `tnsnames.ora` file.
  - User name** - database login user name.
  - Password** - password of the database user.
  - Provider** - The Oracle database communication library (eg. OraOLEDB Oracle).
- From the *Component* column, select **Archive Manager Search** and verify the database parameter values.
  - 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.
- Click **Next**. The *Hierarchical Storage Manager Settings* window opens.

Archive Manager Installation Wizard

**WELCOME**  
**PLANNING**  
**INSTALLATION**  
**TOOLS**  
**SETUPS**

**Hierarchical Storage Manager Settings** [Help](#)

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.

**Local HSM installation**

HSM server:

Store name:  Schema name:

Please select a location for the HSM folder which is large enough to handle all of the content you wish to archive.

Store folder:

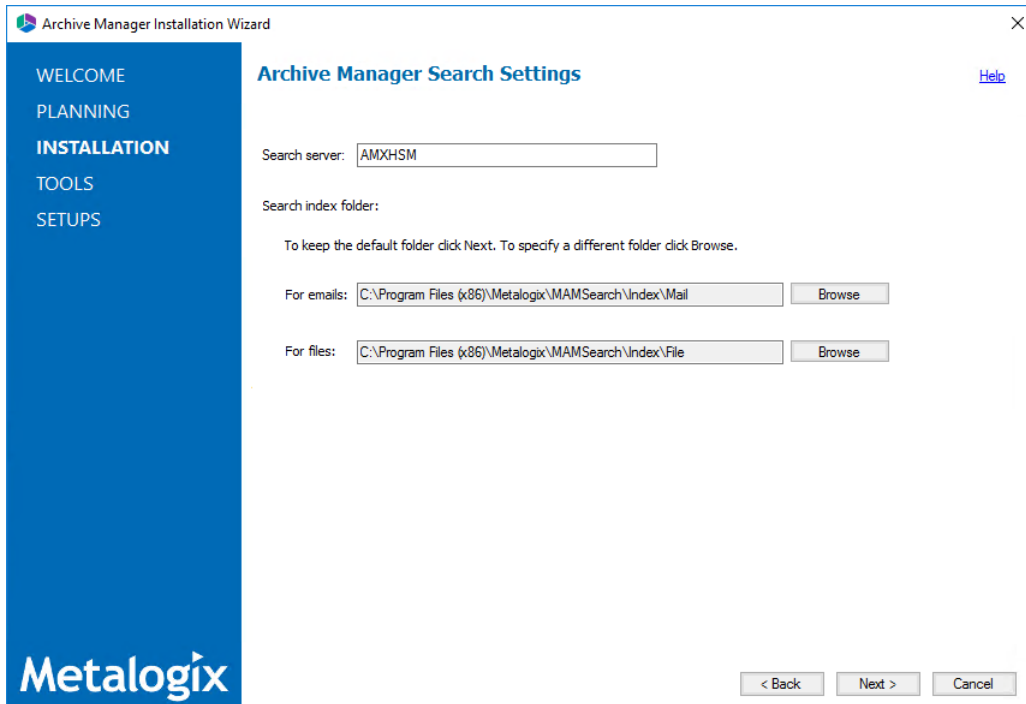
**Metalogix**

< Back Next > Cancel

16. Specify the parameter values as described below:

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

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



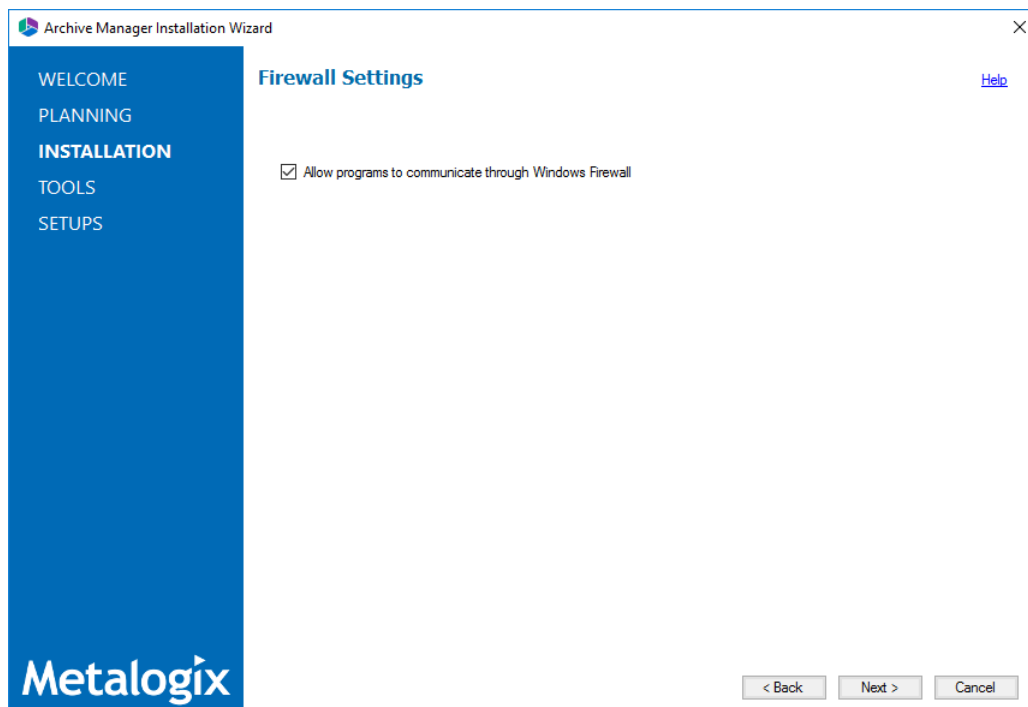
The screenshot shows the 'Archive Manager Search Settings' window of the 'Archive Manager Installation Wizard'. On the left is a blue sidebar with a navigation menu containing 'WELCOME', 'PLANNING', 'INSTALLATION' (highlighted), 'TOOLS', and 'SETUPS'. The 'Metalogix' logo is at the bottom of this sidebar. The main window area has the title 'Archive Manager Search Settings' and a 'Help' link. It contains the following fields and controls:

- 'Search server:' text box with the value 'AMXHSM'.
- 'Search index folder:' label with a note: 'To keep the default folder click Next. To specify a different folder click Browse.'
- 'For emails:' text box with the value 'C:\Program Files (x86)\Metalogix\MAMSearch\Index\Mail' and a 'Browse' button.
- 'For files:' text box with the value 'C:\Program Files (x86)\Metalogix\MAMSearch\Index\File' and a 'Browse' button.
- At the bottom right are three buttons: '< Back', 'Next >', and 'Cancel'.

Specify the parameter values as described below:

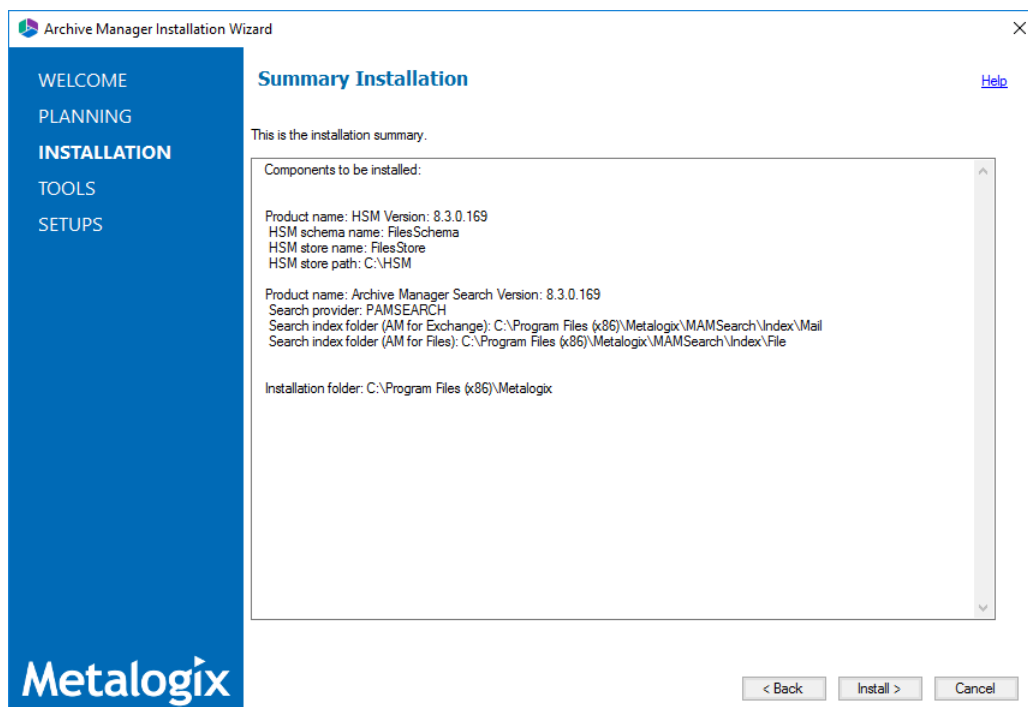
- a. **Search server** - name of the server where the Archive Manager Search feature is installed.  
For example **AMXHSM**.

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

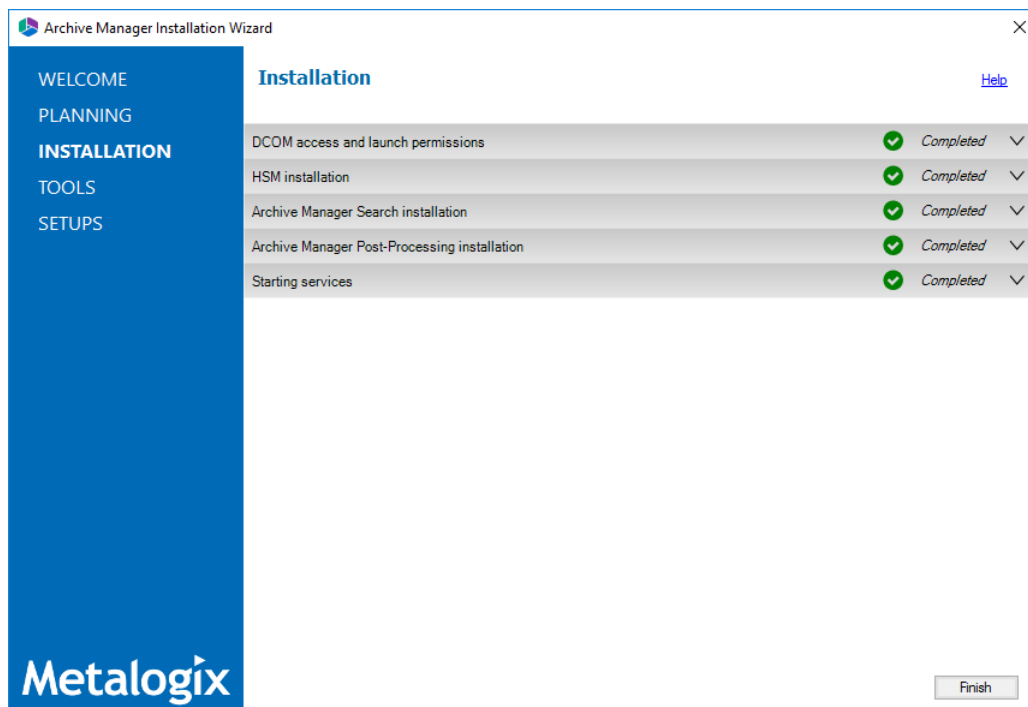


Select the **Allow installation package to change the firewall settings** check box. Metalogix Archive Manager for Exchange features will be then able to communicate through the firewall.

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.

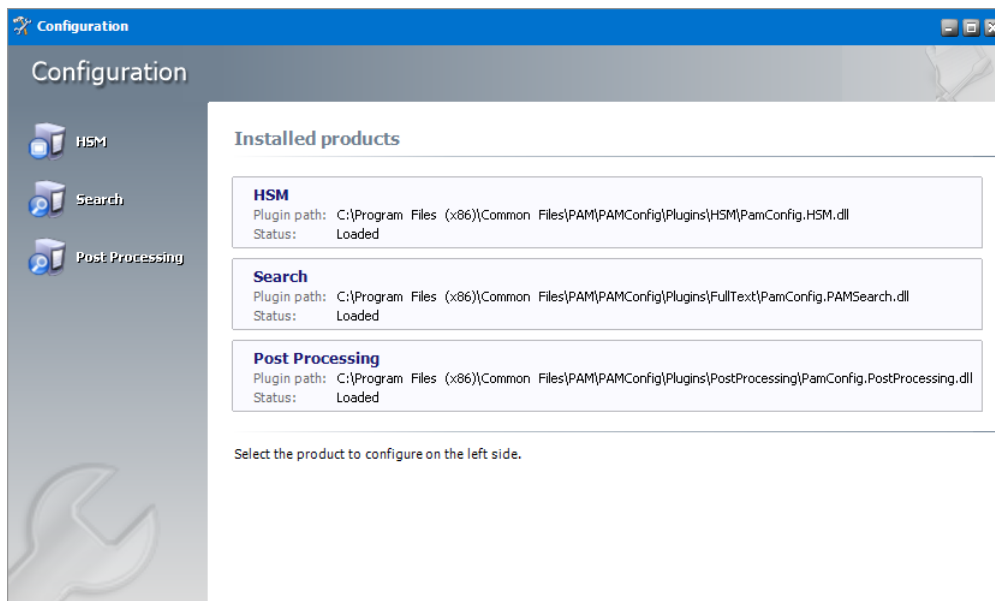


21. The installer proceeds to install all the features. If a feature installation fails or completes with a warning, expand the row to view and address the problem.

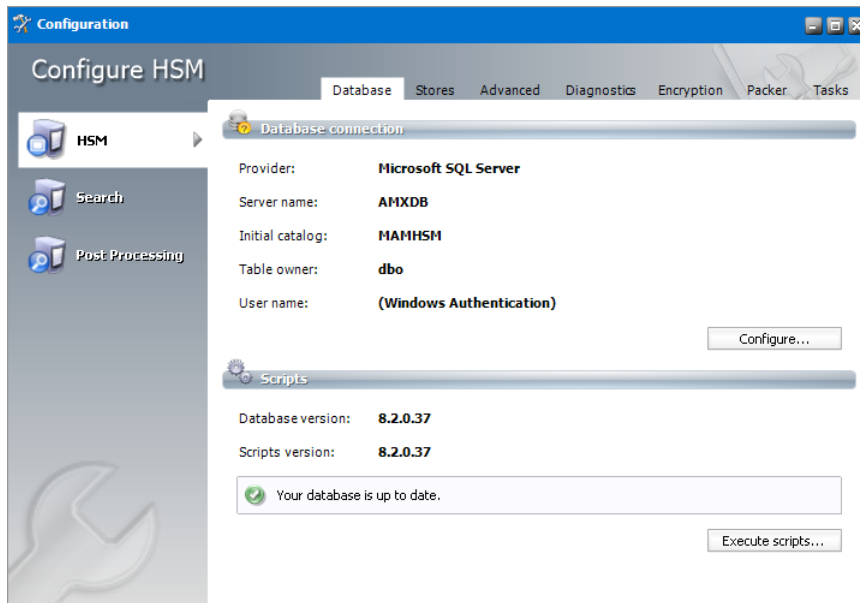
22. Click **Finish** to complete the installation step.

## Steps to verify the installation

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

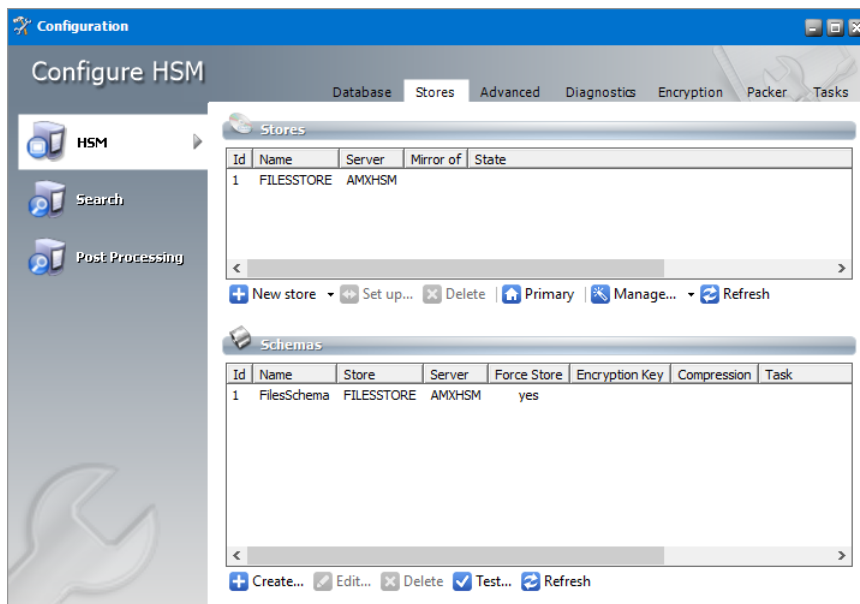


2. From the navigation panel, click **HSM**. The *Configure HSM* window opens and the **Database** tab is displayed by default.



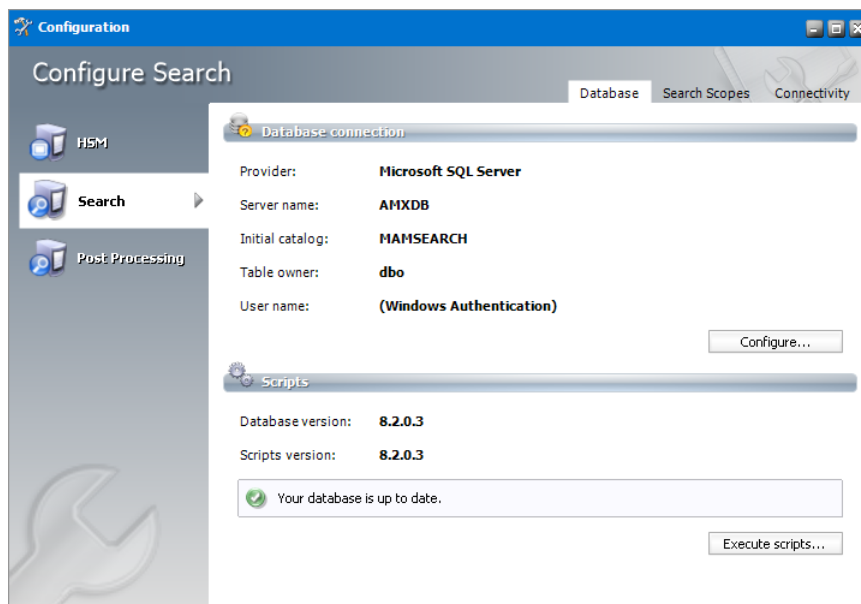
Verify that the values are as expected.

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



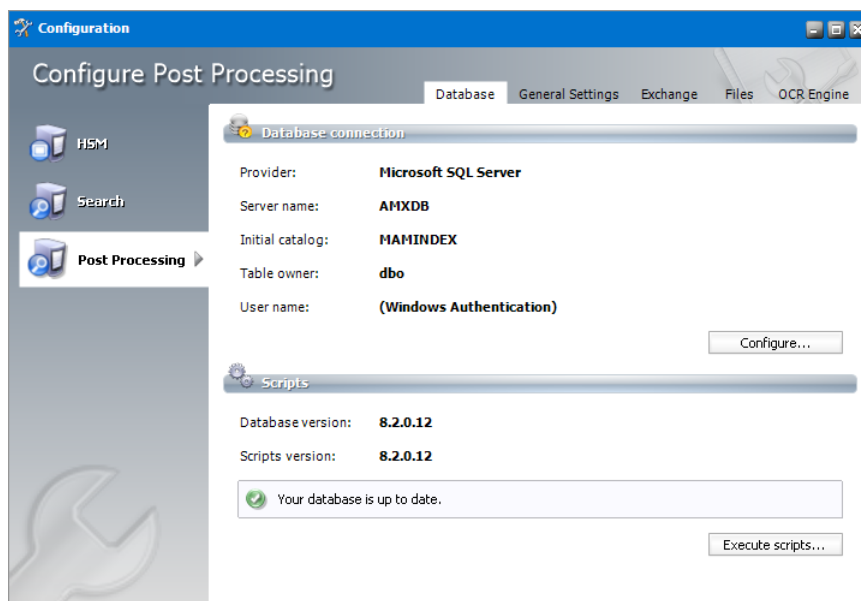
Verify that the values in the *Stores* and *Schemas* sections are as expected.

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



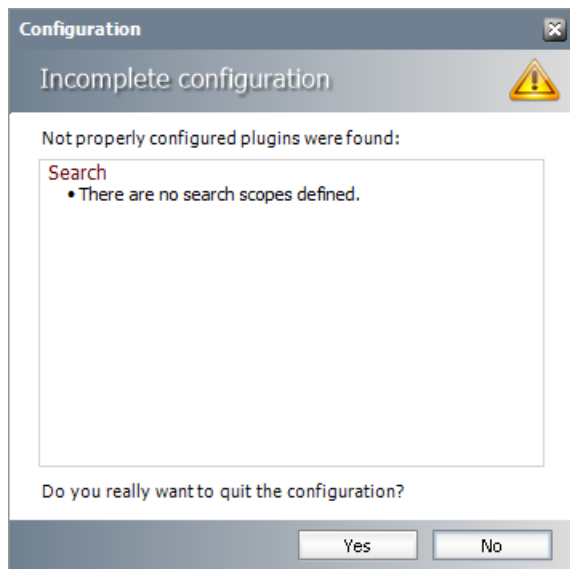
Verify that the values are as expected.

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

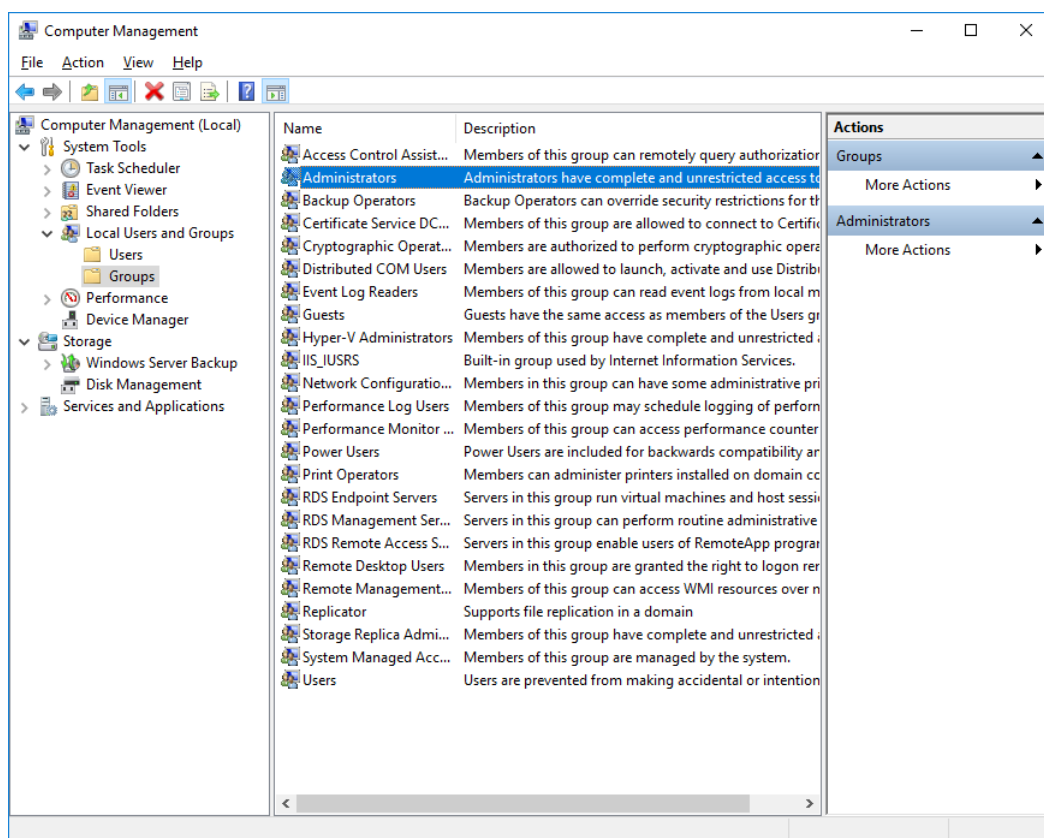


Verify that the values are as expected.

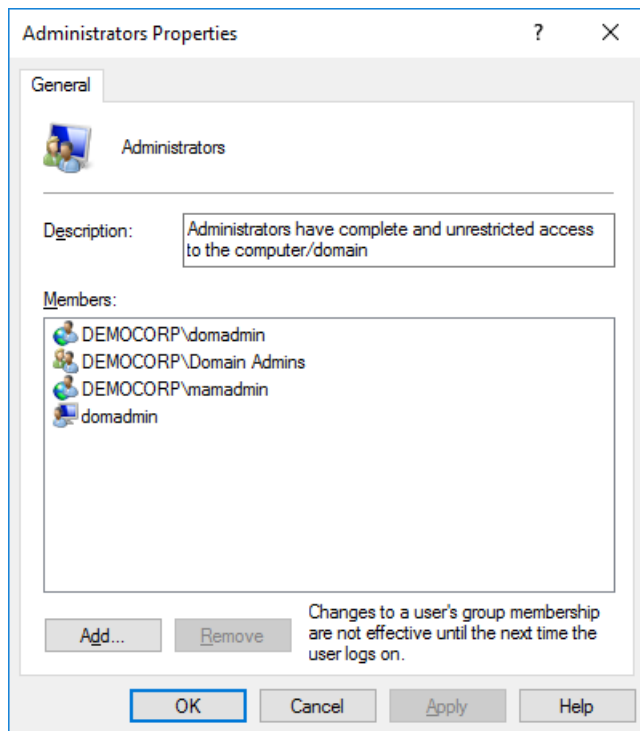
6. Close the *Configuration* wizard. If the *Incomplete configuration* dialog opens, click **Yes** to dismiss the window and close the wizard.



7. Open **Start > Windows Administrative Tools > Computer Management**. The *Computer Management* console opens.
8. From the *Console Tree*, expand **Local Users and Groups**.
9. Click the **Groups** node to display the list of groups.



10. Right-click **Administrators** and select **Properties** from the context menu. The *Administrators Properties* window opens.



Verify that the superuser account is listed in the *Members* panel. For example, **DEMOCORP\mamadmin**

11. Click **OK** to close the properties window, and then close the *Computer Management* console.



# Install the Archive server

In this topic:

- [Worksheet for this installation](#)
- [Steps to install Metalogix Archive Manager for Exchange](#)
- [Steps to configure and verify the Archive server](#)

## Worksheet for this installation

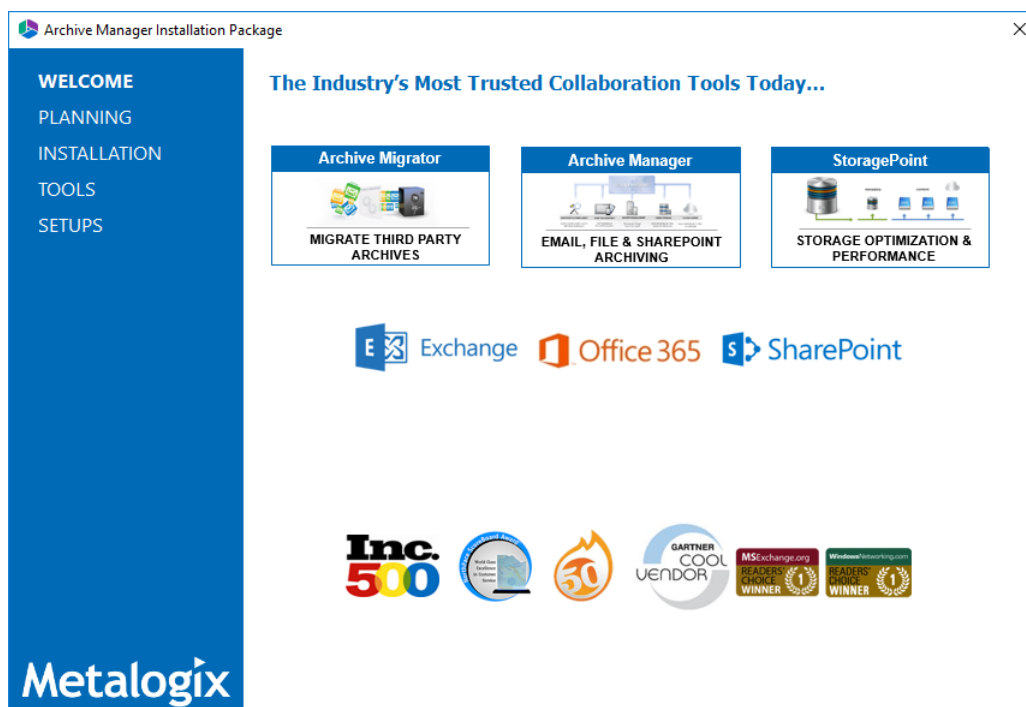
The following information will be required through the installation process. Sample values are provided here as a guidance.

Item	Description	Example
License Key	The license key that you received from Quest. If you don't have a license key, contact your Quest representative.	894K5-3M448-M544E-A594A-7K8Z7 (Sample only. This key is neither an active nor an expired license key)
Archive Manager for Exchange server	The server where the Archive Manager for Exchange will be installed.	AMXSERVER-A
Installer account	Windows account that is used to install the application. This is usually the enterprise administrator.	username: democorp\domadmin password: *****
Superuser account	Windows account that is used to run the application and run the Archive Manager for Exchange services.	username: democorp\mamadmin 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
Database Authentication method	Type of database authentication: <i>Integrated Windows Authentication</i> or <i>SQL Authentication</i>	Integrated Windows Authentication

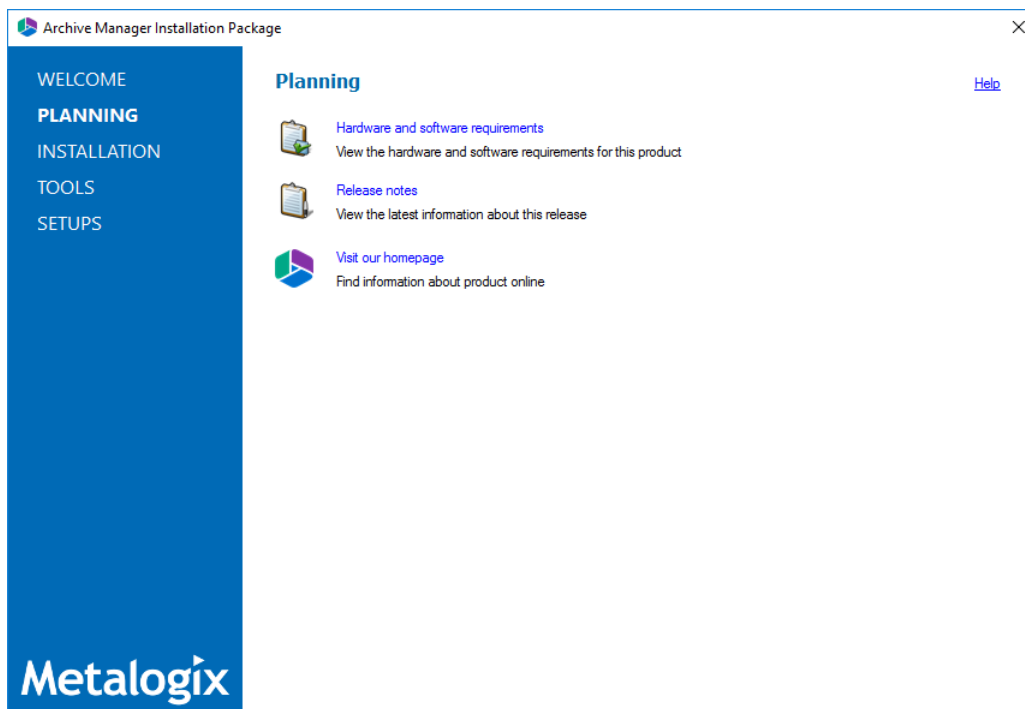
UserLogin	Username if <i>SQL Authentication</i> is selected	dbadmin
Password	Database password if <i>SQL Authentication</i> is selected	*****
Database server	The database server instance name where the databases for Archive Manager for Files will be installed.	AMXDB
HSM server	The server where HSM is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

## Steps to install Metalogix Archive Manager for Exchange

1. Log in to the server with the credentials of the **enterprise administrator** (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.

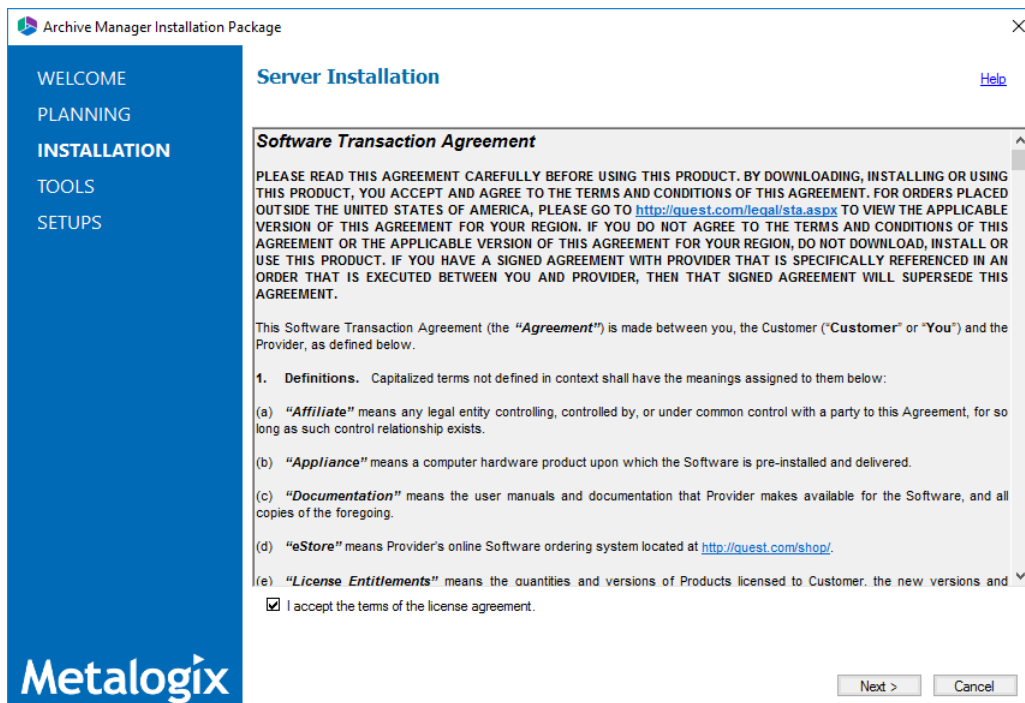


4. From the navigation panel on the left, click **PLANNING**. The *Planning* window opens.



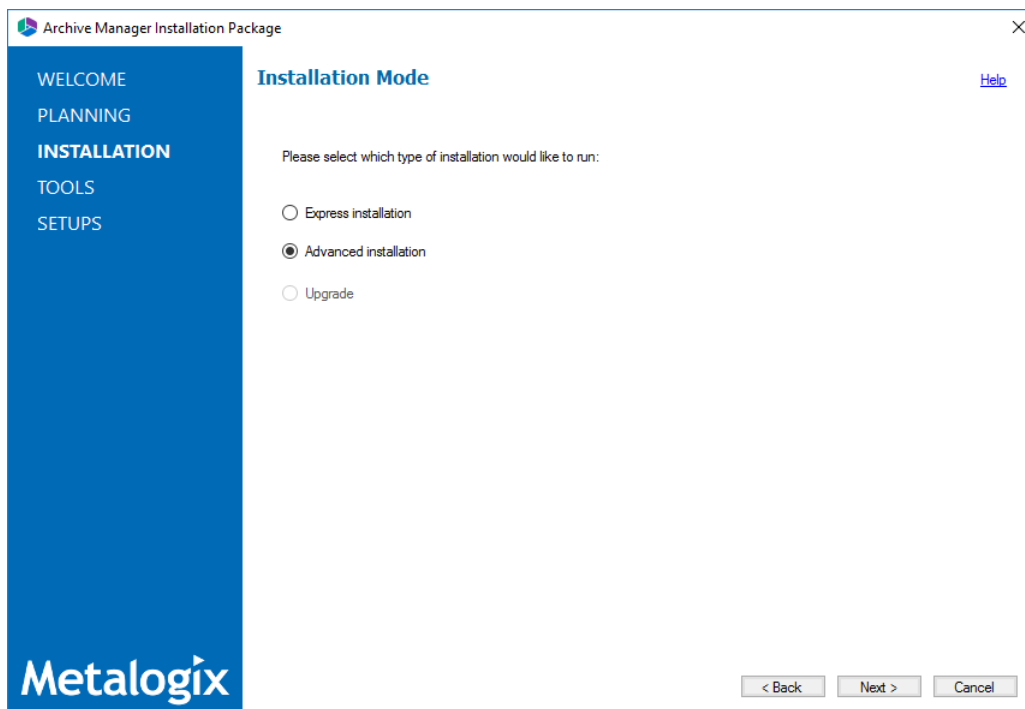
Review the requirements and release notes. If necessary, visit the Quest website for more information.

5. From the navigation panel on the left, click **INSTALLATION**. The *Server Installation* window opens.

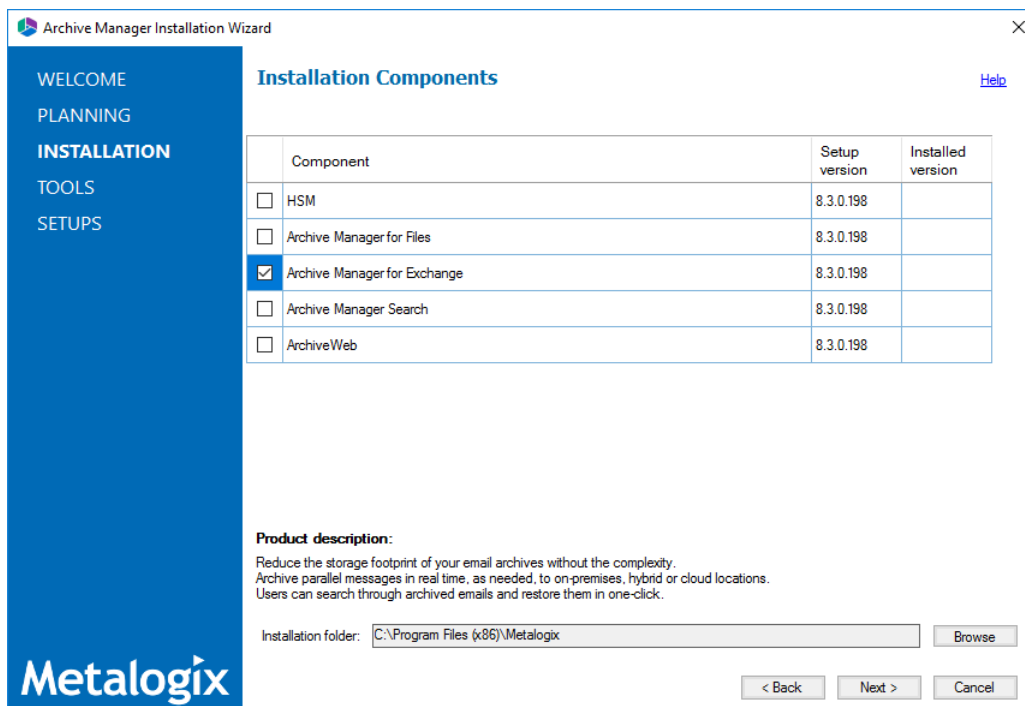


Read the **Software Transaction Agreement**. If you wish to proceed, select the **I accept the terms of the license agreement** check box.

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



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



Select **Archive Manager for Exchange**.

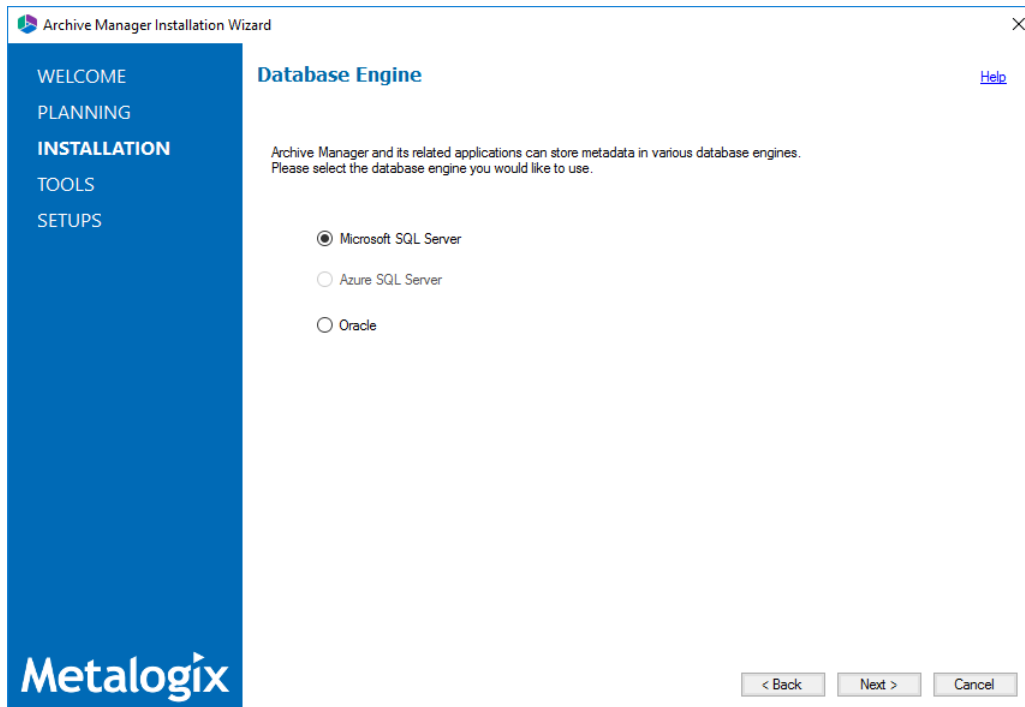


**NOTE:**

**Archive Manager for Files** could be installed on the same server. Installation of Archive Manager for Files is described in the *Metalogix® Archive Manager for Files Advanced Installation Guide*.

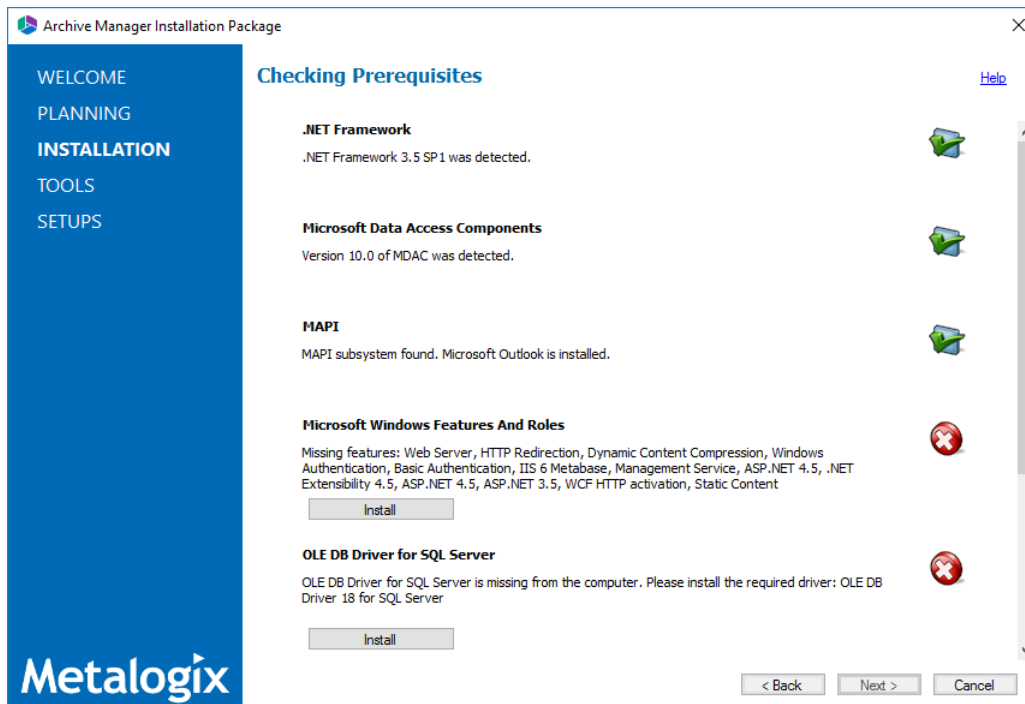
**ArchiveWeb** is an enhancement. Installation of ArchiveWeb is described in the *Metalogix® Archive Manager for Exchange ArchiveWeb Manual*.

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



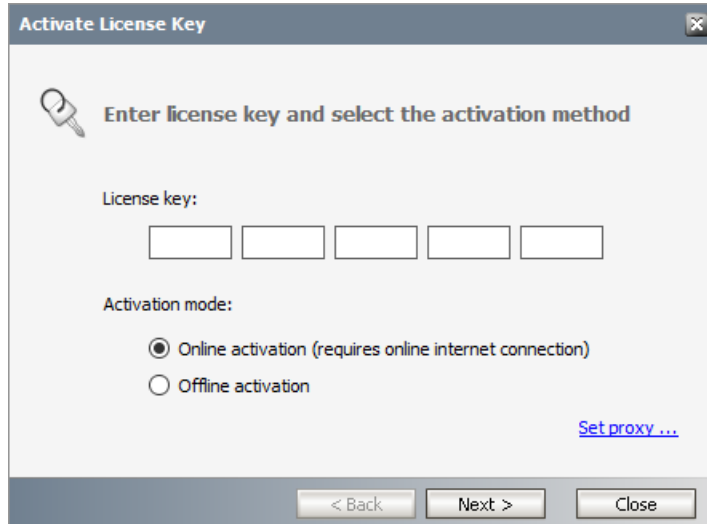
Select either **Microsoft SQL Server** or **Oracle**.

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



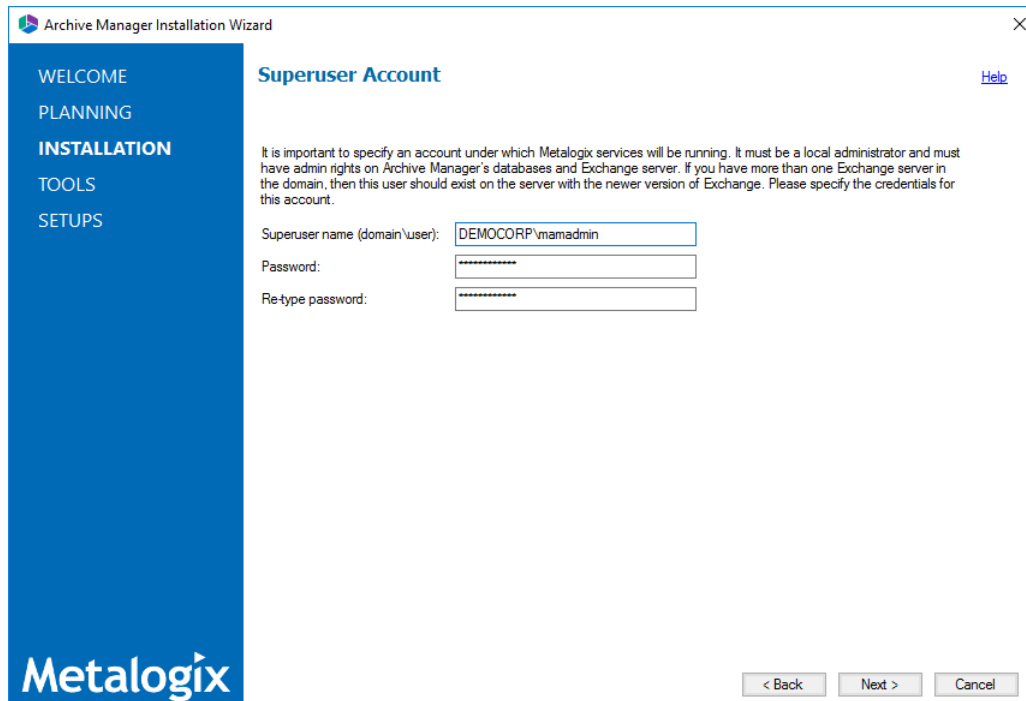
If one or more prerequisites are missing, the **Next** button will appear disabled. Click **Install** for each prerequisite to install the missing features. Scroll down to expose and install all the prerequisites.

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



If you are connected to the internet, select **Online activation** or see [License Activation](#) for more options. Click **Next**. When your license is activated, you will see a confirmation message and the license details. Click **Finish** to close the **Activate License Key** dialog.

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



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

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

Archive Manager Installation Wizard

WELCOME  
PLANNING  
**INSTALLATION**  
TOOLS  
SETUPS

**Database Server Connection** [Help](#)

Please fill in all values which will be used to create a connection to your Database Server.

Component	DB Server
Archive Manager for Exchange	MSSQL
Archive Manager Multitenant	MSSQL
Archive Manager Auditing	MSSQL

**Authentication**

Authentication: Integrated Windows Authentication

UserLogin:   
Password:   
  
**Server instance**

TableOwner: dbo  
ServerName: AMXDB  
DatabaseName: MAMEXCH  
Provider: MSOLEDBSQL

**ServerName**  
Database instance server name

< Back Next > Cancel

Metalogix

**NOTE:** If you selected Oracle as your database engine, then 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.
- DatabaseName** - The name of the database that will contain the HSM metadata. The default name is **MAMHSM**.
- Provider** - The SQL or Oracle 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.

- SQLOLEDB - 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

- Oracle net name** - net service name that describes the network address of the database server in your `tnsnames.ora` file.
- Schema** - name of the Oracle schema from your `tnsnames.ora` file.
- User name** - database login user name.
- Password** - password of the database user.
- Provider** - The Oracle database communication library (eg. OraOLEDB Oracle).

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

**Hierarchical Storage Manager Settings** [Help](#)

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.

**HSM settings for installed components**

Component	HSM server name
Archive Manager for Exchange	AMXHSM

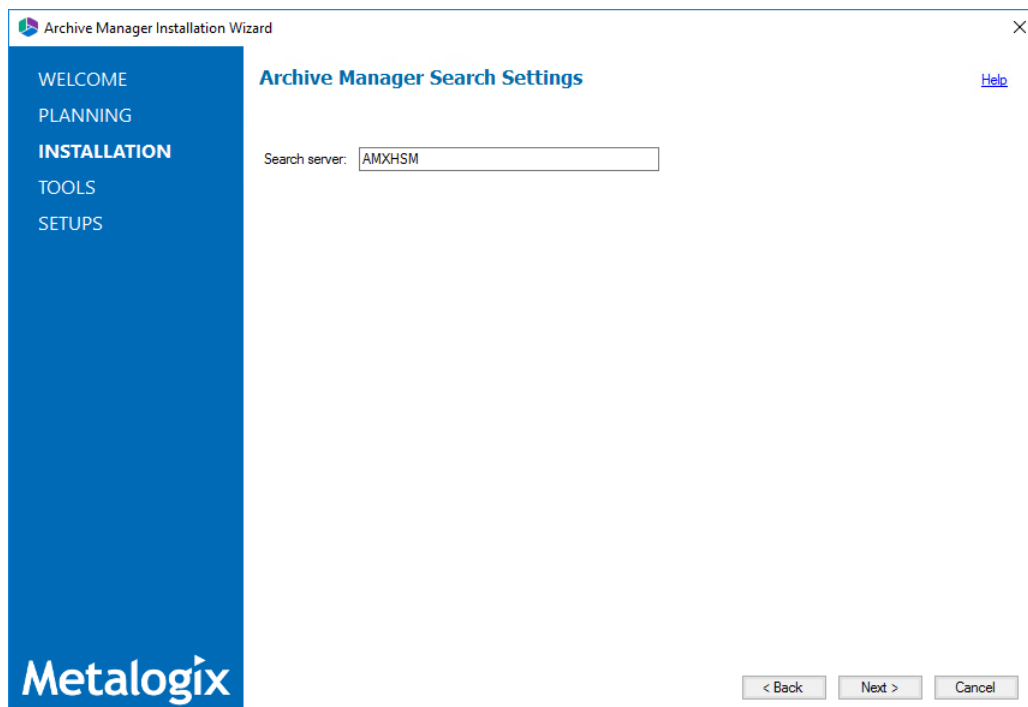
**Navigation:** < Back, Next >, Cancel

**Metalogix**

In the **HSM server name** field enter the name of the server where the HSM application feature is installed. For example **AMXHSM**.

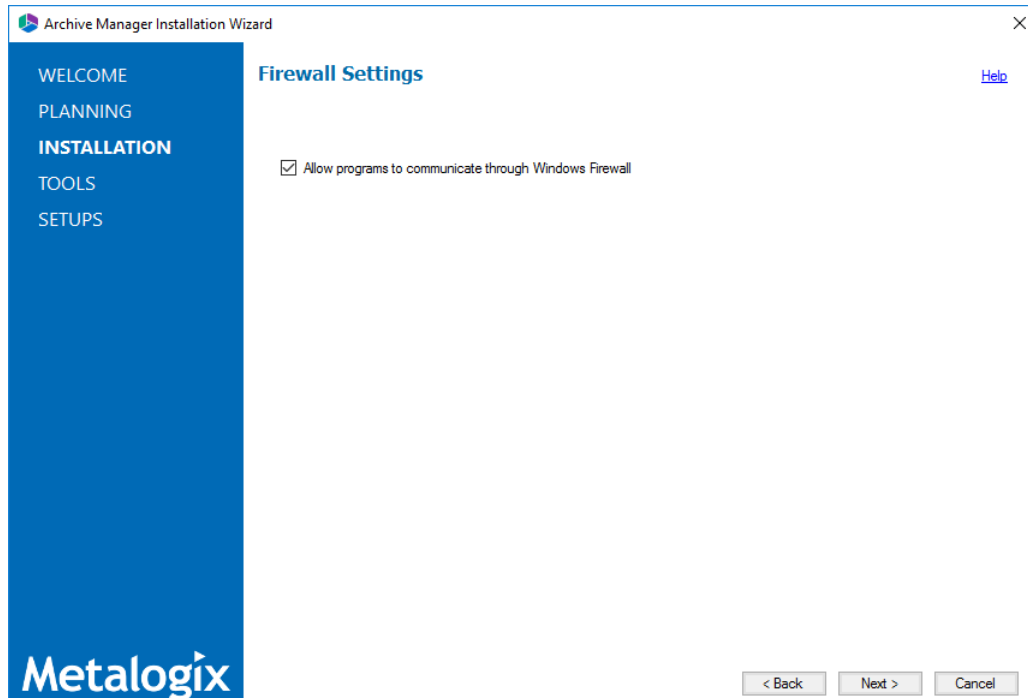


13. Click **Next**. The *Please select the type of installation* window opens.



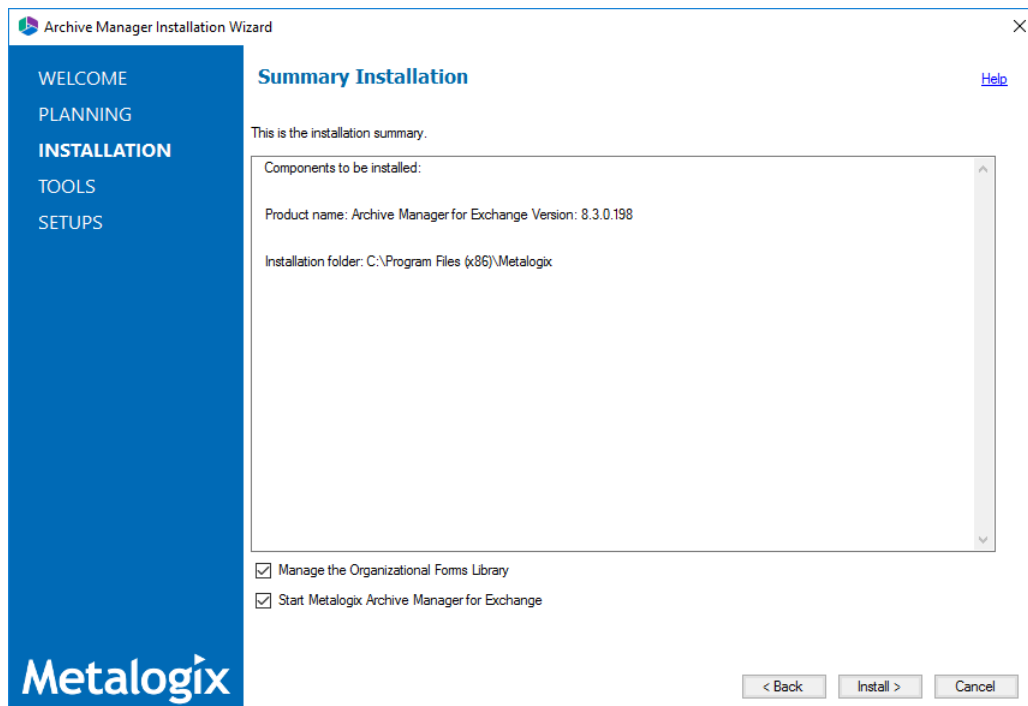
In the **Search server** field enter the name of the server where the Archive Manager Search feature is installed. For example **AMXHSM**.

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

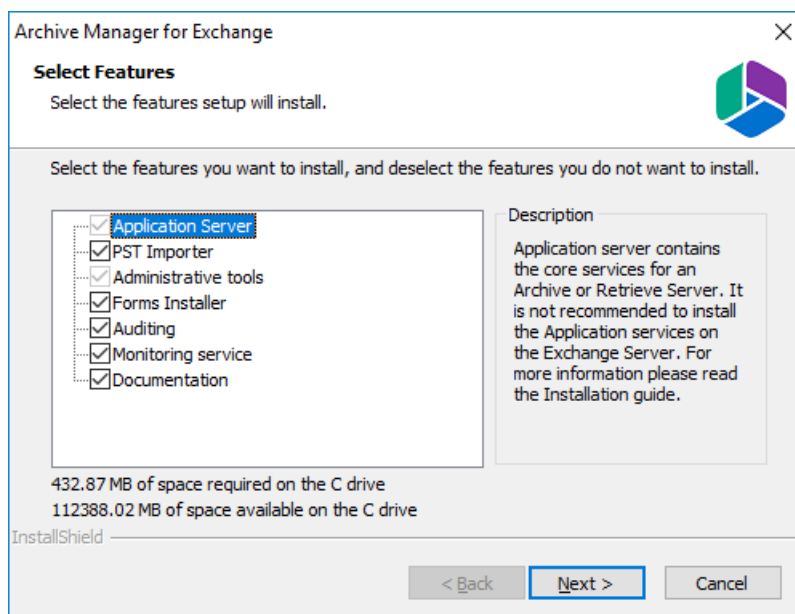


Select the **Allow programs to communicate through Windows Firewall** check box. Metalogix Archive Manager for Exchange features will be then able to communicate through the firewall.

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



- a. Select **Manage the Organizational Forms Library** if your organization uses this public folder to share email templates. Otherwise, clear the check box.
  - b. Select the check box **Start Metalogix Archive Manager for Exchange** to open the Archive Manager for Exchange Administration Center (AMAC) when the installation completes.
16. Click **Install** to start the installation.
17. When the installer starts installing the Archive Manager for Exchange feature, the *Select Features* window of the Archive Manager for Exchange opens.



### Mandatory features

- Application Server
- Administrative tool

### Optional features

- Auditing
- Monitoring service

### Optional resources

- PST Importer
- Forms Installer
- Documentation

Keep the default selections to experience the full range of features. Then click **Next** to install the features.

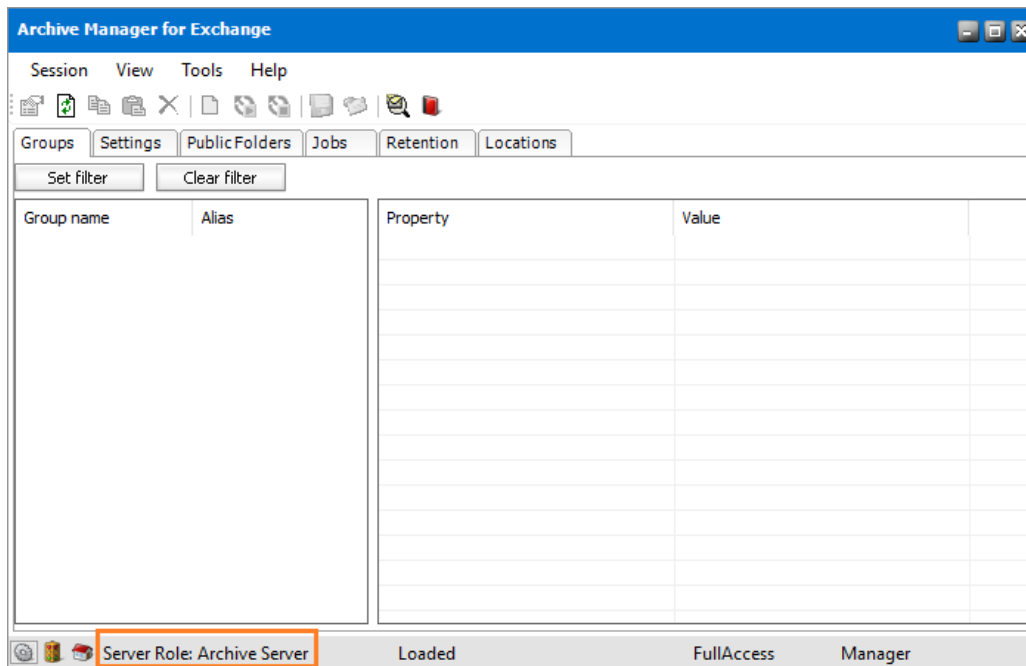
- Click **Next** to continue the installation. If a feature installation fails or completes with a warning, expand the row to view and address the problem.



- Click **Finish** to complete the installation step.
- The Archive Manager for Exchange Administration Center (AMAC) should open automatically if the check box **Start Metalogix Archive Manager for Exchange** was checked in the *Summary Installation* step of the installation wizard.
- The *Address Book Setup* wizard opens automatically for a new installation. Click **Close** to exit the wizard. Then close the Address Book Manager window that opens. For advanced installation, Address Book setup can be done at a later step. For more information see [Setup the Address Book](#).

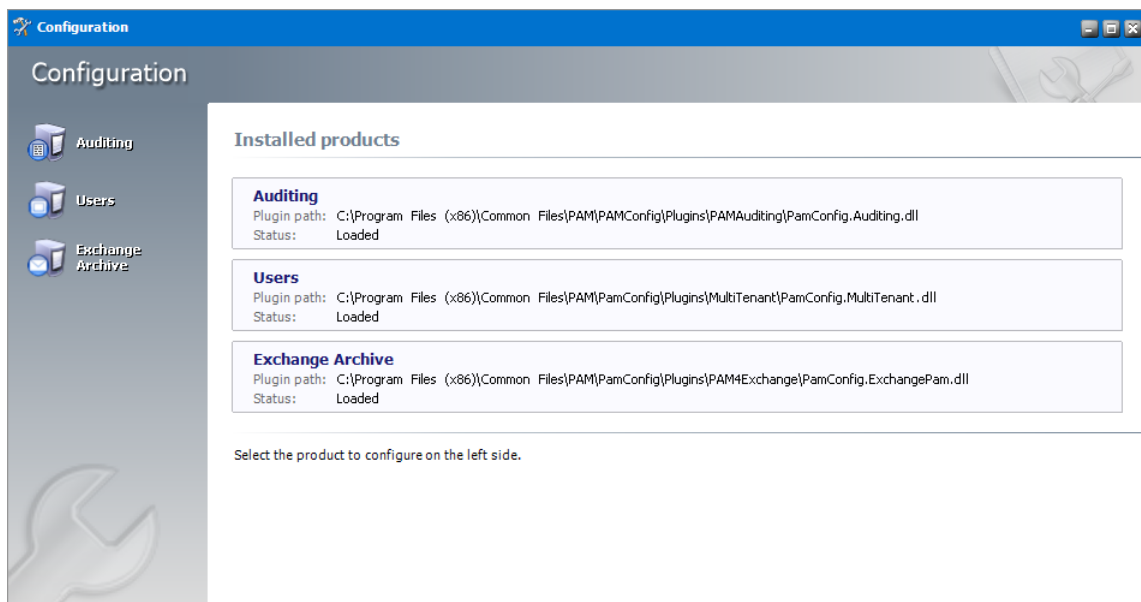
## Steps to configure and verify the Archive server

1. If the AMAC is not already open, click **Start > Archive Manager for Exchange**. The AMAC opens.

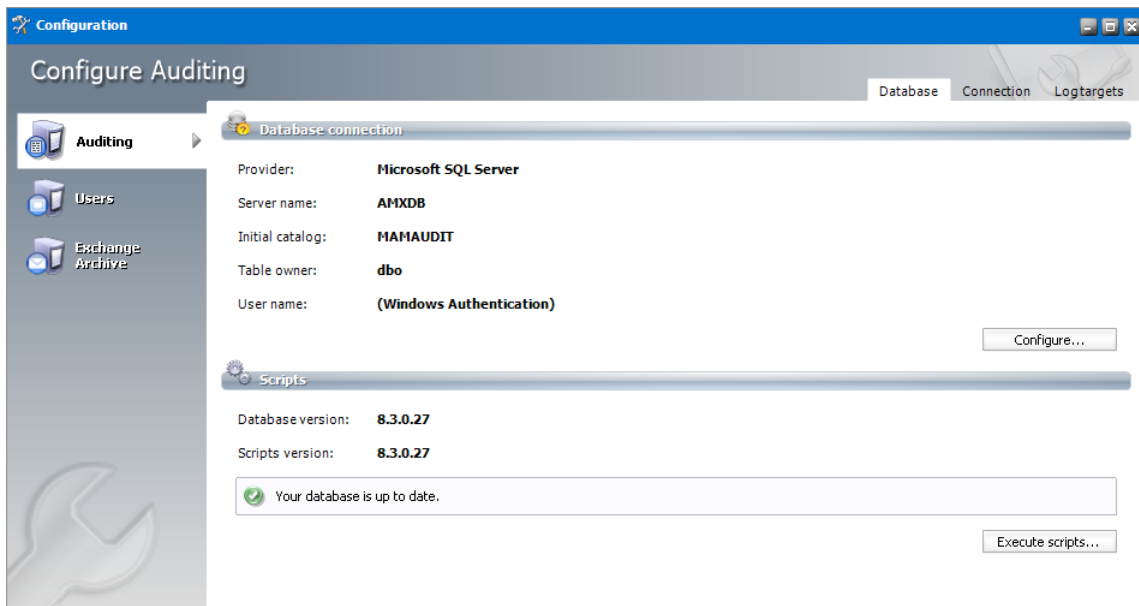


On the status bar at the bottom of the window, verify that the **Server Role** is set to **Archive Server**.

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

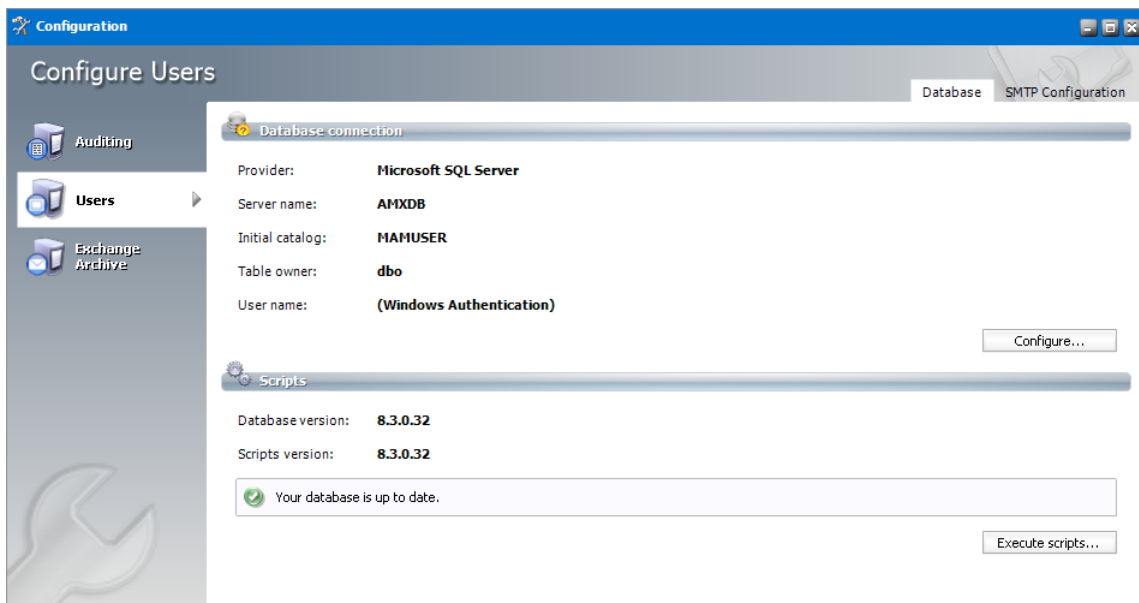


3. From the navigation panel, click **Auditing**. The *Configure Auditing* window opens and the **Database** tab is displayed by default.



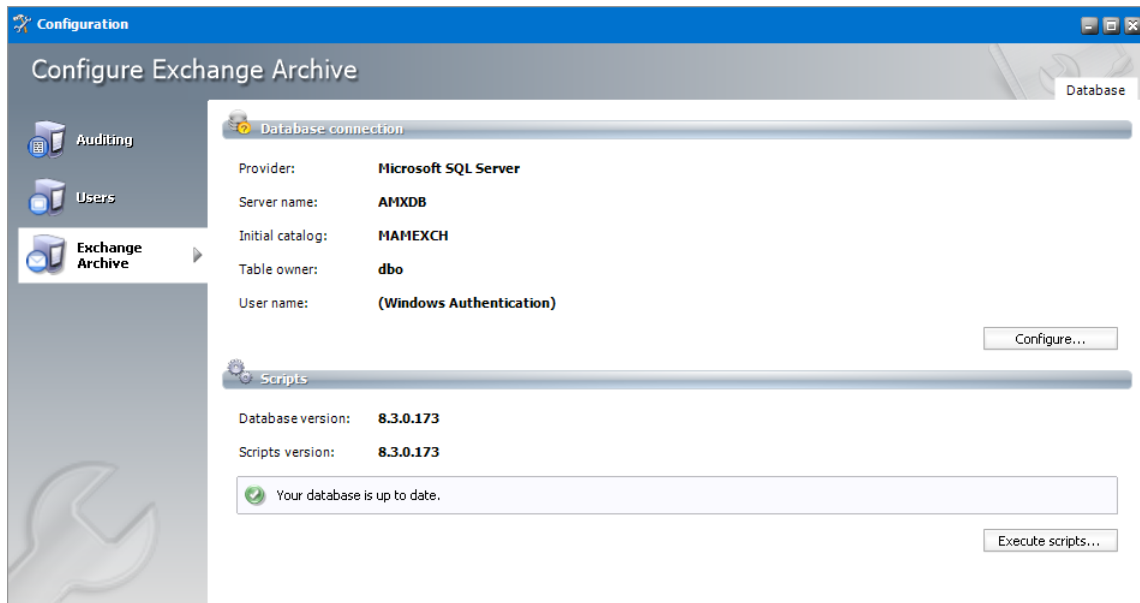
Verify that the values are as expected.

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



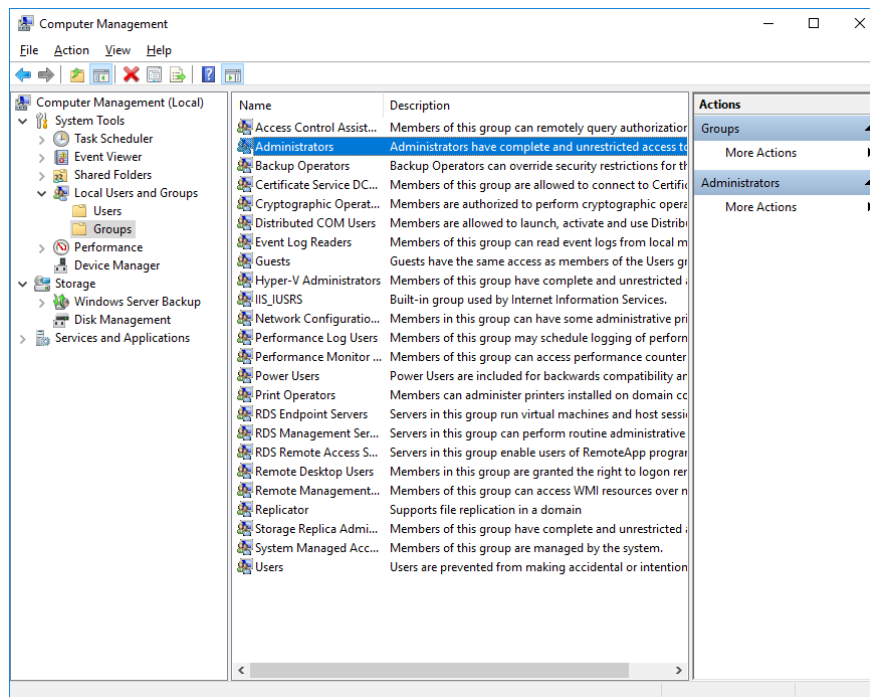
Verify that the values are as expected.

- From the navigation panel, click **Exchange Archive**. The *Configure Exchange Archive* window opens and the **Database** tab is displayed by default.

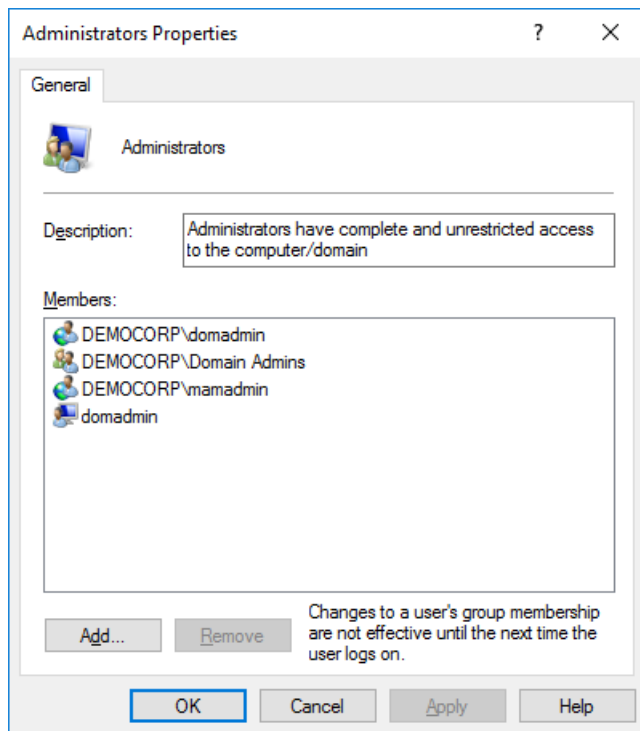


Verify that the values are as expected.

- Close the *Configuration* wizard.
- Open **Start > Windows Administrative Tools > Computer Management**. The *Computer Management* console opens.
- From the *Console Tree*, expand **Local Users and Groups**.
- Click the **Groups** node to display the list of groups.



10. Right-click **Administrators** and select **Properties** from the context menu. The *Administrators Properties* window opens.



Verify that the superuser account is listed in the *Members* panel. For example, **DEMOCORP\mamadmin**

11. Click **OK** to close the properties window, and then close the *Computer Management* console.

## Install the Retrieve server

In this topic:

- [Worksheet for this installation](#)
- [Steps to install Metalogix Archive Manager for Exchange](#)
- [Steps to configure and verify the Retrieve server](#)

### Worksheet for this installation

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

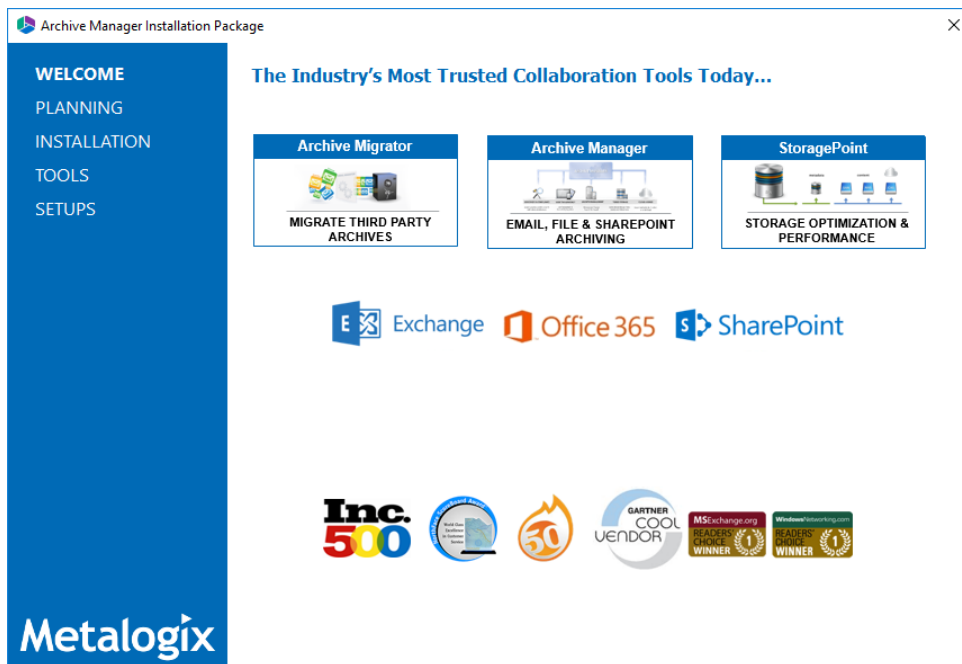
Item	Description	Example
License Key	The license key that you received from Quest. If you	894K5-3M448-M544E-A594A-7K8Z7 (Sample only. This key is

	don't have a license key, contact your Quest representative.	neither an active nor an expired license key)
Archive manager for Exchange server	The server where the Archive Manager for Exchange will be installed with the <i>Retrieve</i> role.	AMXSERVER-R
Installer account	Windows account that is used to install the application. This is usually the enterprise administrator.	username: democorp\domadmin password: *****
Superuser account	Windows account that is used to install the application and run the Archive Manager for Exchange services.	username: democorp\mamadmin 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
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.	AMXDB
HSM server	The server where HSM is installed.	AMXHSM
Search server	The server where the Archive Manager Search is installed.	AMXHSM

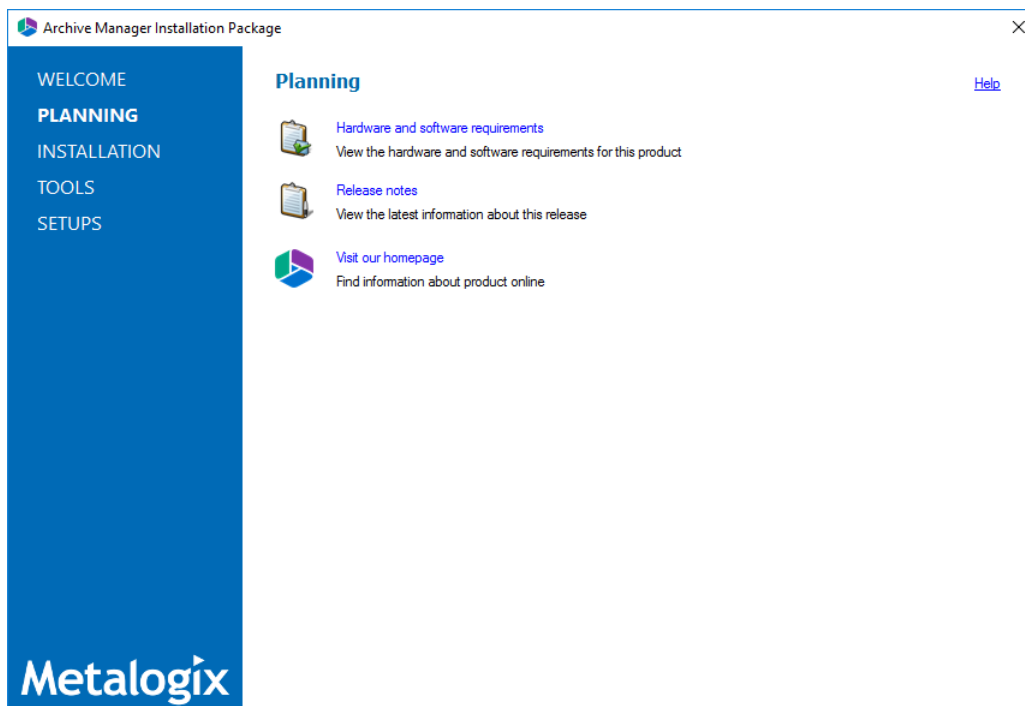


## Steps to install Metalogix Archive Manager for Exchange

1. Log in to the server with the credentials of the **enterprise administrator** (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.

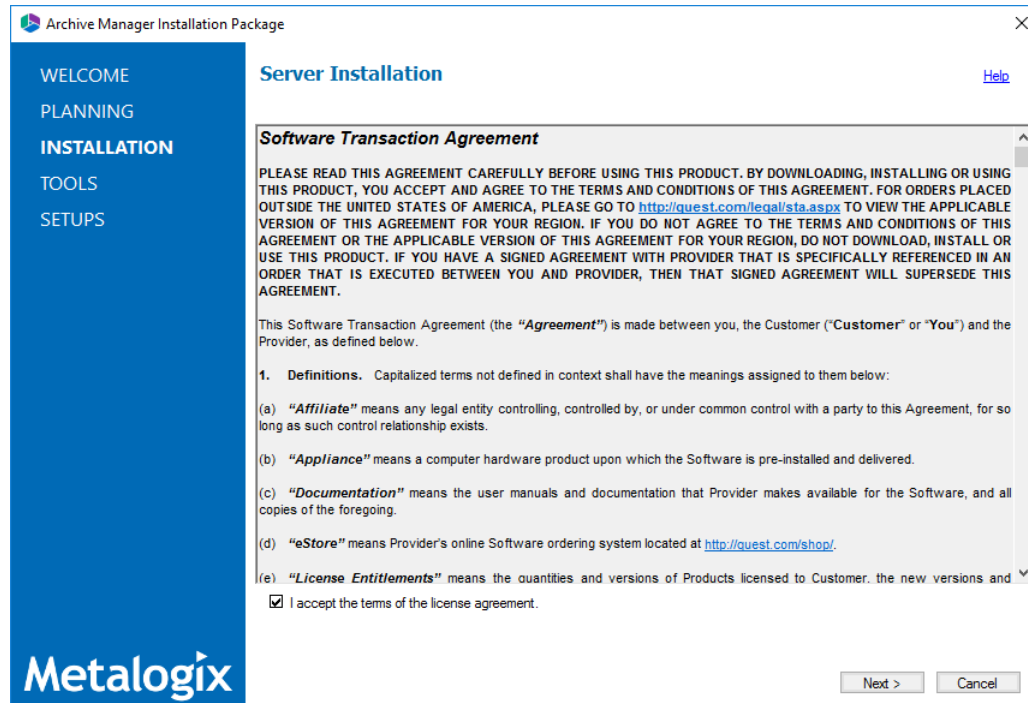


4. From the navigation panel on the left, click **PLANNING**. The *Planning* window opens.



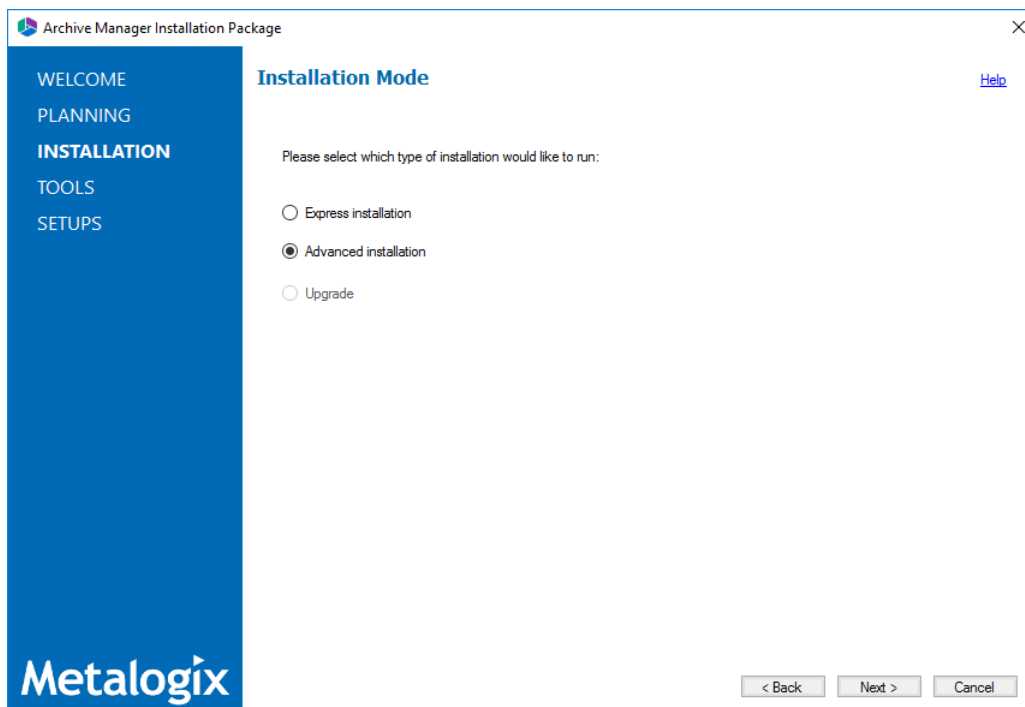
Review the requirements and release notes. If necessary, visit the Quest website for more information.

5. From the navigation panel on the left, click **INSTALLATION**. The *Server Installation* window opens.

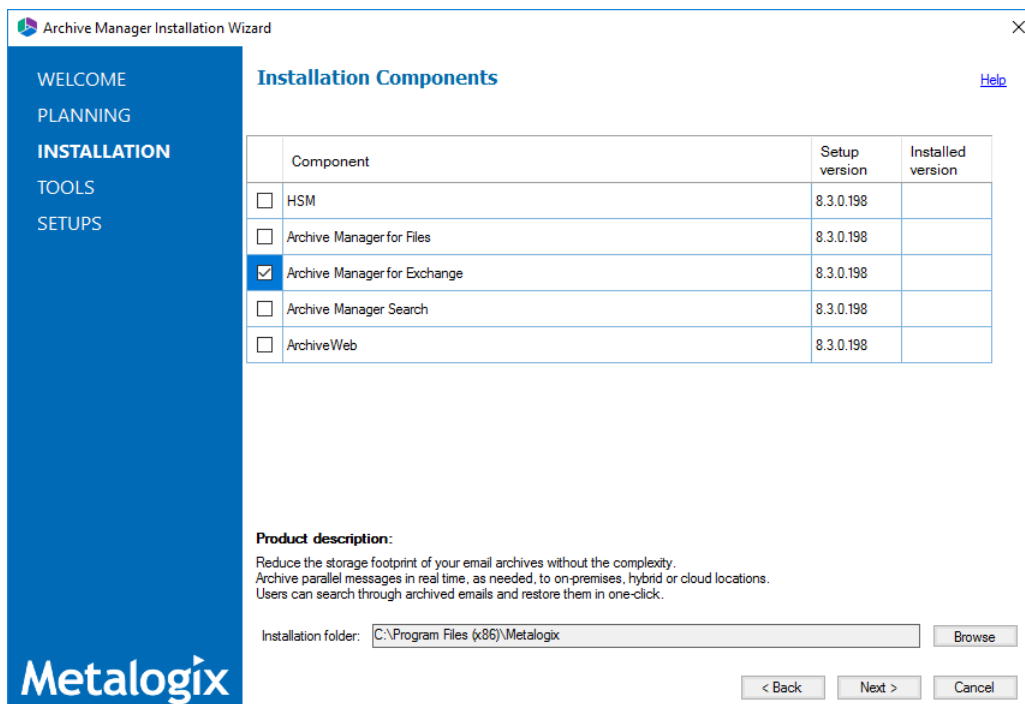


Read the **Software Transaction Agreement**. If you wish to proceed, select the **I accept the terms of the license agreement** check box.

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

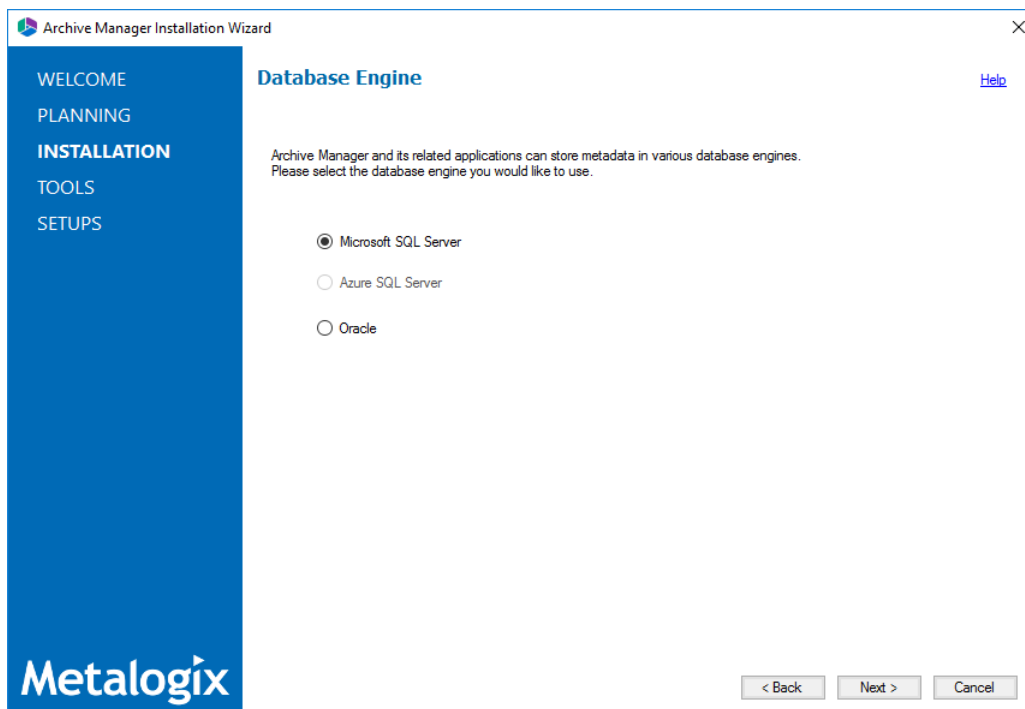


7. Click **Next**. The *Installation Components* window opens.



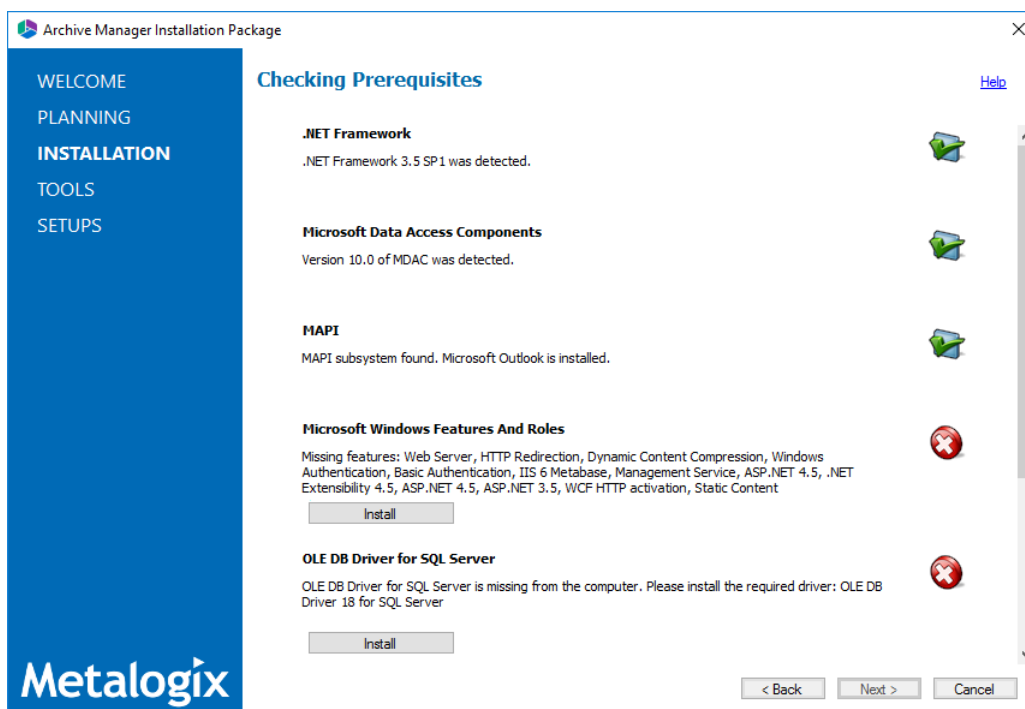
Select **Archive Manager for Exchange**.

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



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

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



If one or more prerequisites are missing, the **Next** button will appear disabled. Click **Install** for each prerequisite to install the missing features. Scroll down to expose and install all the prerequisites.

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

If you are connected to the internet, select **Online activation** or see [License Activation](#) for more options. Click **Next**. When your license is activated, you will see a confirmation message and the license details. Click **Finish** to close the **Activate License Key** dialog.

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

Specify the **Superuser name** and **Password**. Enter the password again in the **Retype password** field.

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

**Archive Manager Installation Wizard**

**Database Server Connection** [Help](#)

Please fill in all values which will be used to create a connection to your Database Server.

Component	DB Server
Archive Manager for Exchange	MSSQL
Archive Manager Multitenant	MSSQL
Archive Manager Auditing	MSSQL

**Authentication**

Authentication: Integrated Windows Authentication

UserLogin:   
 Password:

**Server instance**

TableOwner: dbo

ServerName: **AMXDB**

DatabaseName: **MAMEXCH**

Provider: MSOLEDBSQL

**ServerName**  
Database instance server name

< Back Next > Cancel

**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.
- DatabaseName** - The name of the database that will contain the HSM metadata. The default name is **MAMHSM**.
- Provider** - The SQL or Oracle 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.

- SQLOLEDB - 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

- Oracle net name** - net service name that describes the network address of the database server in your `tnsnames.ora` file.
- Schema** - name of the Oracle schema from your `tnsnames.ora` file.
- User name** - database login user name.
- Password** - password of the database user.
- Provider** - The Oracle database communication library (eg. OraOLEDB Oracle).

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

**Hierarchical Storage Manager Settings** [Help](#)

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.

**HSM settings for installed components**

Component	HSM server name
Archive Manager for Exchange	AMXHSM

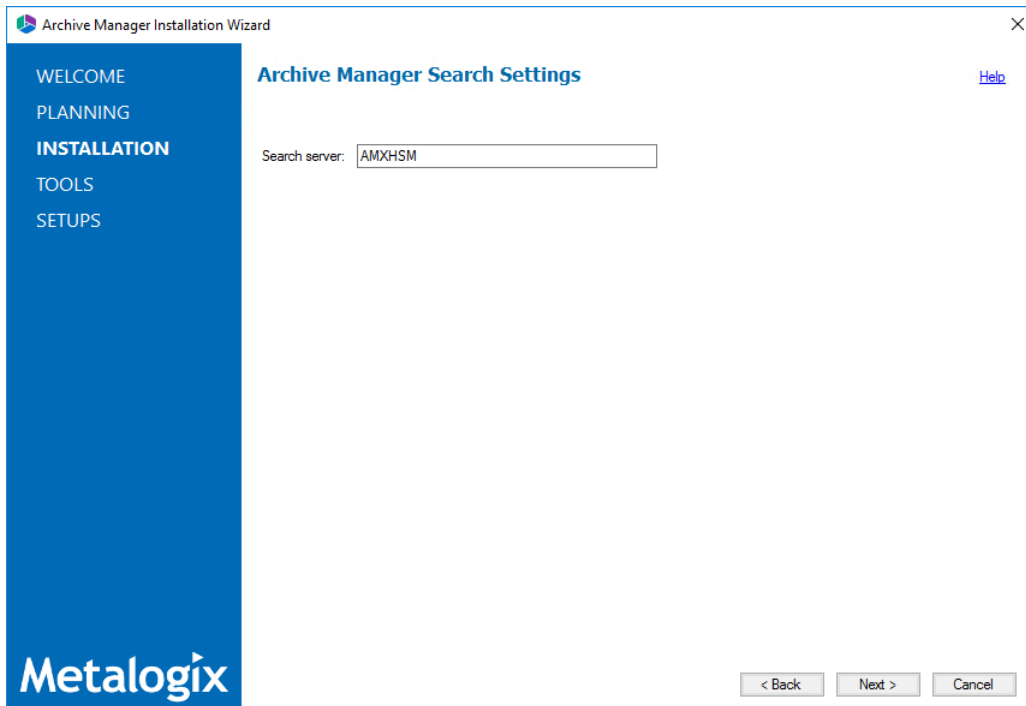
**Metalogix**

< Back    Next >    Cancel

Specify the parameter values as described below:

- HSM server name** - name of the server where the HSM and Archive manager Search features are installed. For example **AMXHSM**.

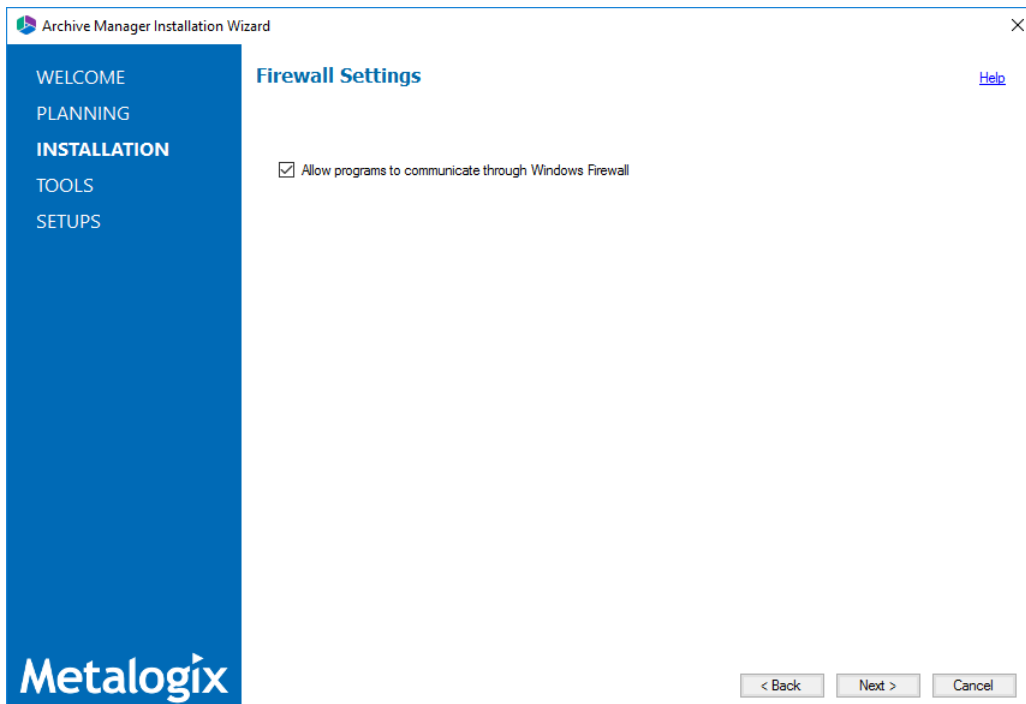
13. Click **Next**. The *Please select the type of installation* window opens.

The image shows the 'Archive Manager Search Settings' window from the 'Archive Manager Installation Wizard'. On the left is a blue sidebar with a list of steps: WELCOME, PLANNING, **INSTALLATION**, TOOLS, and SETUPS. The 'INSTALLATION' step is highlighted. Below the sidebar is the 'Metalogix' logo. The main area of the window is titled 'Archive Manager Search Settings' and contains a 'Search server:' label followed by a text input field containing the value 'AMXHSM'. A 'Help' link is located in the top right corner. At the bottom right, there are three buttons: '< Back', 'Next >', and 'Cancel'.

Specify the parameter values as described below:

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

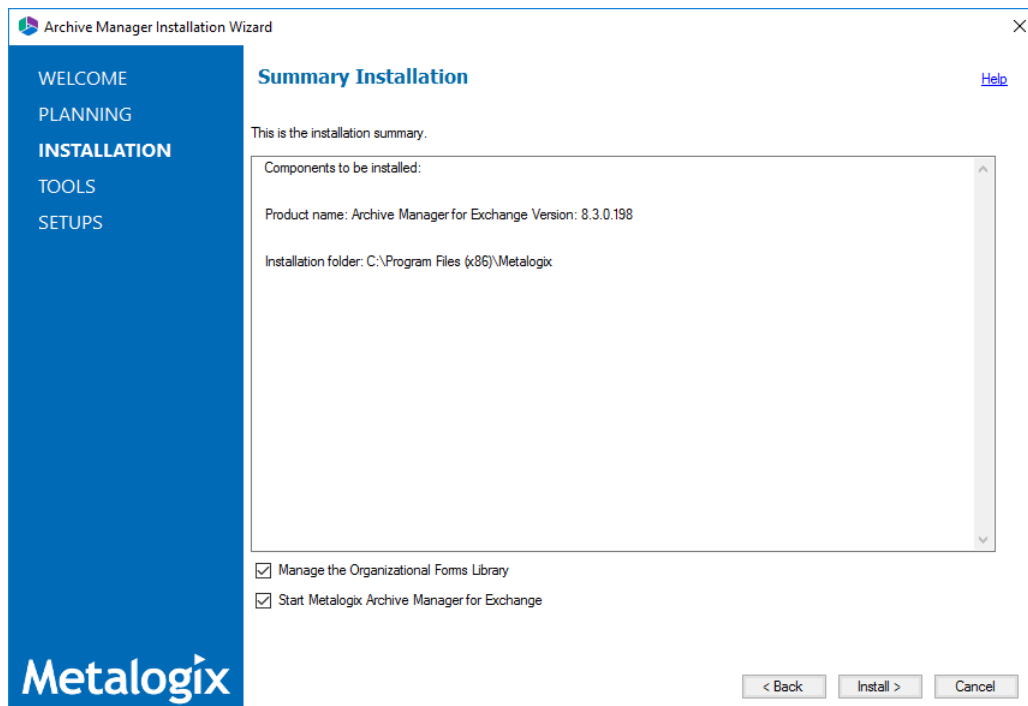
14. Click **Next**. The *Firewall Settings* window opens.

The image shows the 'Firewall Settings' window from the 'Archive Manager Installation Wizard'. It has the same blue sidebar as the previous window, with 'INSTALLATION' highlighted and the 'Metalogix' logo at the bottom. The main area is titled 'Firewall Settings' and contains a single checkbox labeled 'Allow programs to communicate through Windows Firewall', which is currently checked. A 'Help' link is in the top right corner. At the bottom right, there are three buttons: '< Back', 'Next >', and 'Cancel'.

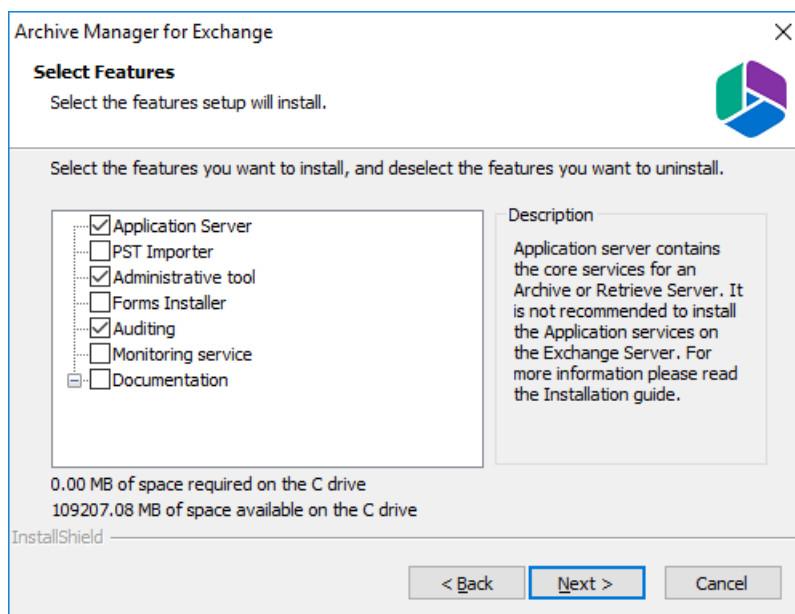
Select the **Allow installation package to change the firewall settings** check box. Metalogix Archive Manager for Exchange features will be then able to communicate through the firewall.



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



- a. Select **Manage the Organizational Forms Library** if your organization uses this public folder to share email templates. Otherwise, clear the check box.
  - b. Select the check box **Start Metalogix Archive Manager for Exchange** to open the Archive Manager for Exchange Administration Center (AMAC) when the installation completes.
16. Click **Install** to start the installation.
17. When the installer starts installing the Archive Manager for Exchange feature, the *Select Features* window of the Archive Manager for Exchange opens.



Only the following features are required

- Application Server
- Administrative tool
- Auditing

Click **Next** to install the features.

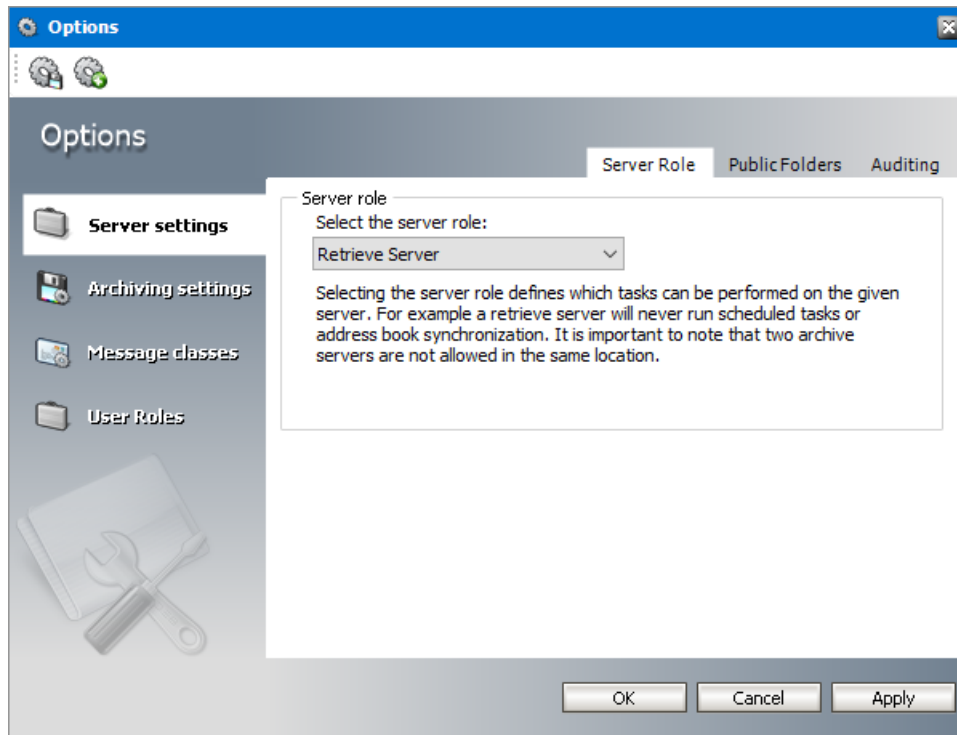
18. Click **Next** to continue the installation. If a feature installation fails or completes with a warning, expand the row to view and address the problem.



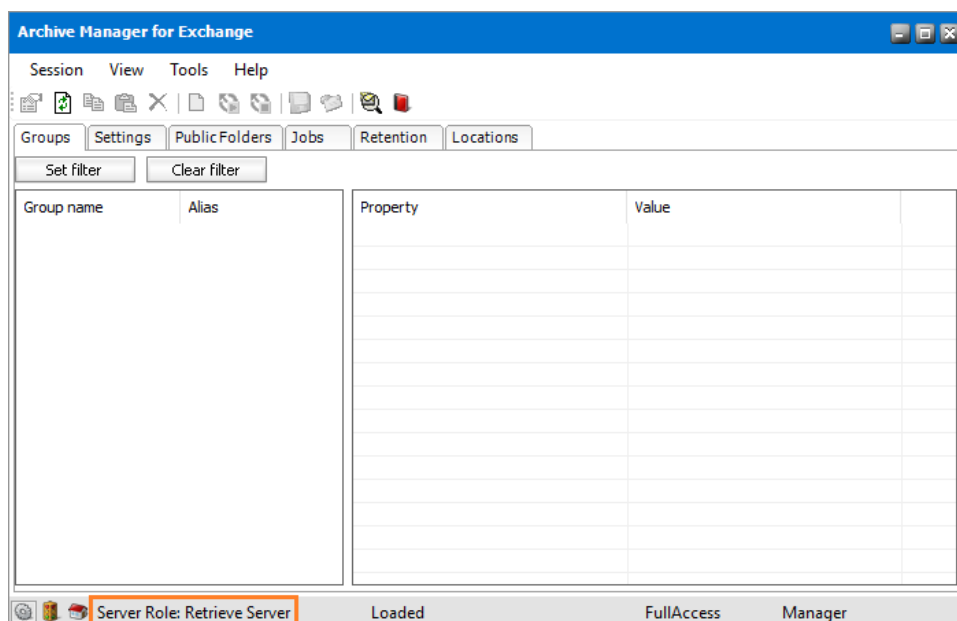
19. Click **Finish** to complete the installation step.
20. The Archive Manager for Exchange Administration Center (AMAC) should open automatically if the check box **Start Metalogix Archive Manager for Exchange** was checked in the *Summary Installation* step of the installation wizard.
21. The *Address Book Setup* wizard opens automatically for a new installation. Click **Close** to exit the wizard. Then close the Address Book Manager window that opens.

## Steps to configure and verify the Retrieve server

1. If the AMAC is not already open, click **Start > Archive Manager for Exchange**. The AMAC opens.
2. From the **Tools** menu select **Options**. The *Options* window opens.

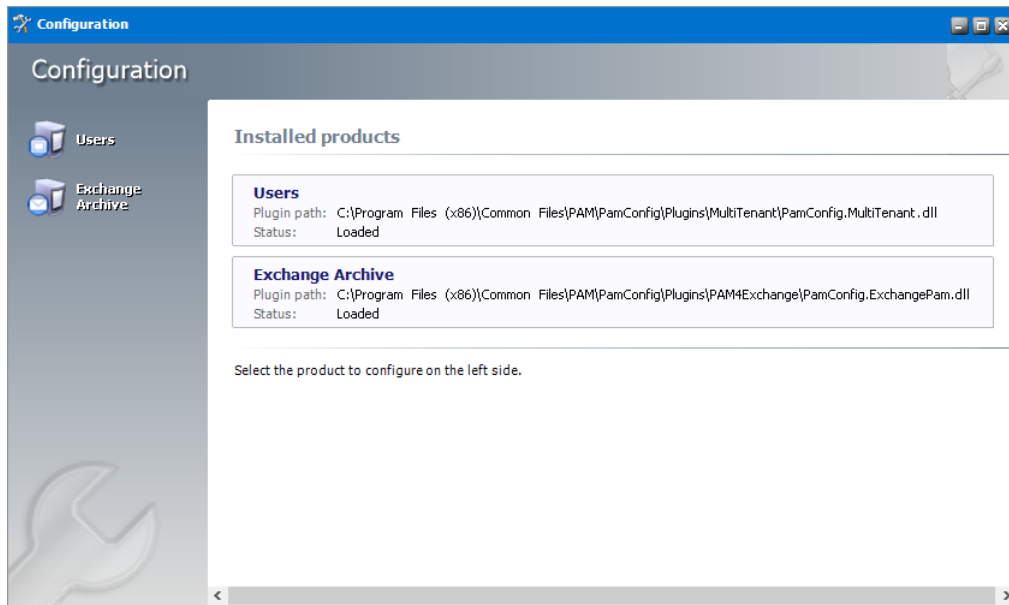


3. From the **Select the server role** drop down list, select **Retrieve Server**.
4. Click **OK** to set the server role and close the window.

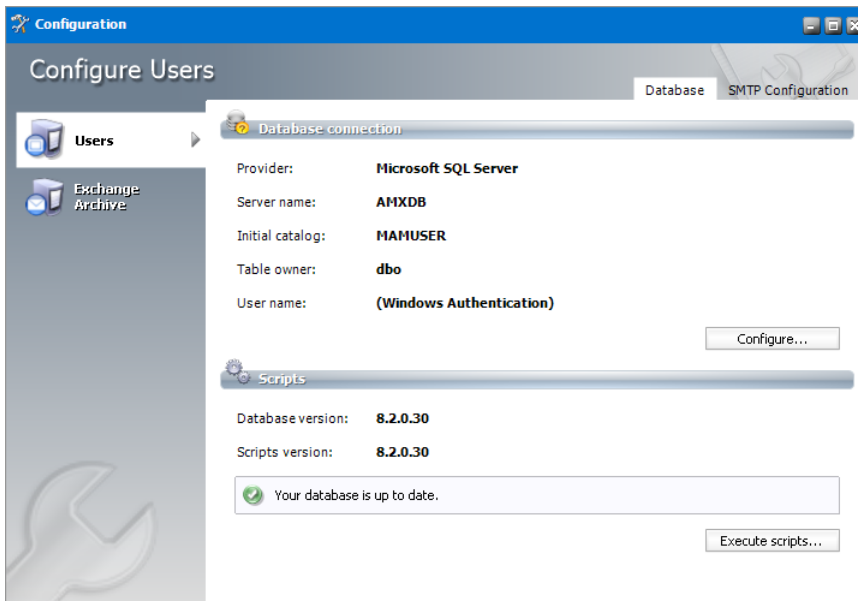


On the status bar at the bottom of the AMAC window, verify that the **Server Role** is set to **Retrieve Server**.

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

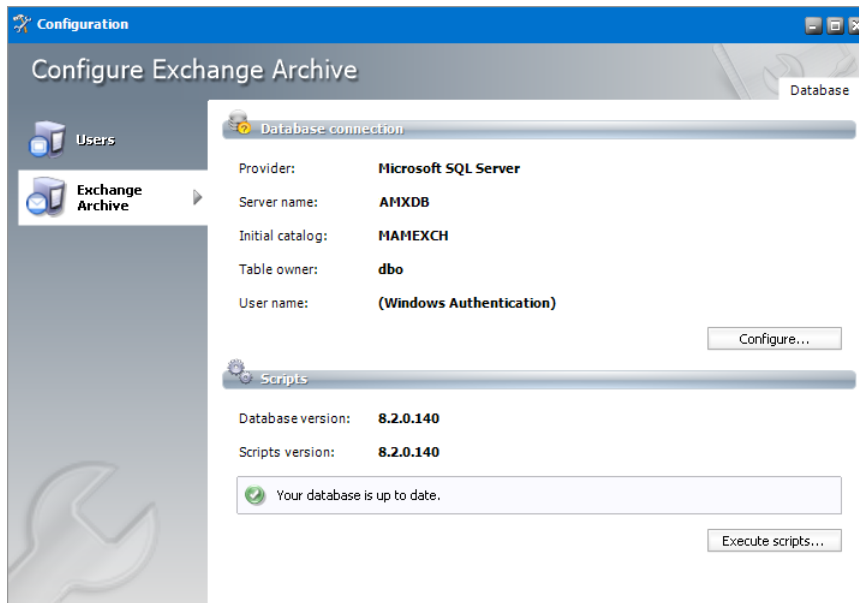


6. From the navigation panel, click **Users**. The *Configure Users* window opens and the **Database** tab is displayed by default.



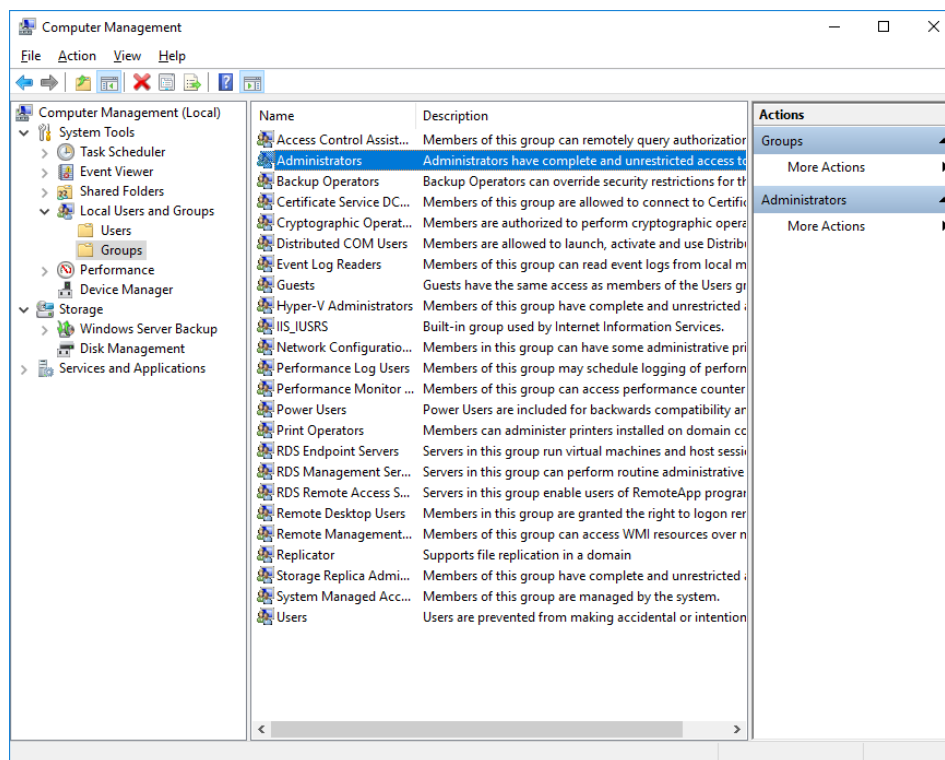
Verify that the values are as expected.

- From the navigation panel, click **Exchange Archive**. The *Configure Exchange Archive* window opens and the **Database** tab is displayed by default.

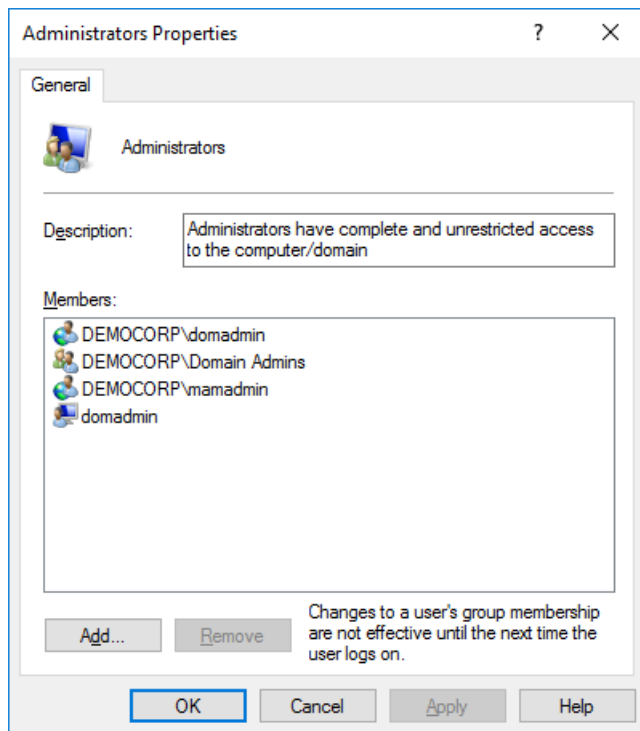


Verify that the values are as expected.

- Close the *Configuration* wizard.
- Open **Start > Windows Administrative Tools > Computer Management**. The *Computer Management* console opens.
- From the *Console Tree*, expand **Local Users and Groups**.
- Click the **Groups** node to display the list of groups.



12. Right-click **Administrators** and select **Properties** from the context menu. The *Administrators Properties* window opens.



Verify that the superuser account is listed in the *Members* panel. For example, **DEMOCORP\mamadmin**

13. Click **OK** to close the properties window, and then close the *Computer Management* console.

---

# Manual Installation

Manual installation gives you a more granular control over the installation process. Manual installation does not use the integrated installer wizard that was used to demonstrate *Express installation* in the *Quick Start Guide* or the *Advanced installation* described in the [Advanced Installation](#) chapter in this guide. This chapter describes in detail the manual steps required to prepare the servers, install the Metalogix Archive Manager for Exchange features by using the individual installers for each feature, and the manual steps to setup the databases and configure the features to communicate with each other as described in the [Deployment Plan](#).

In this chapter:

- [Setup the Superuser Account](#)
- [Modify the Exchange server throttling policy](#)
- [Setup the Organizational Forms Library](#)
- [Prepare the Metalogix Archive Manager for Exchange Servers](#)
  - [Steps to download the install media](#)
  - [Steps to install the prerequisites](#)
  - [Steps to assign DCOM access and launch permissions](#)
  - [Steps to install Microsoft Outlook](#)
- [Install Metalogix Archive Manager for Exchange](#)
  - [Install HSM](#)
  - [Install Archive Manager Search](#)
  - [Install the Archive server](#)
  - [Install the Retrieve server](#)

**i** **NOTE:** The installation and configuration of optional features are described in detail in the guides published for each feature.

For next steps after you complete the manual installation, see [Application Configuration](#).

## Setup the Superuser Account

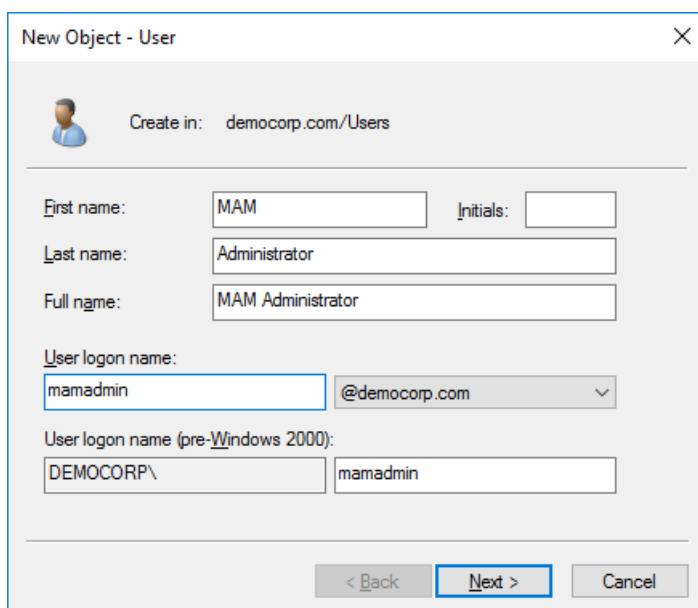
A *superuser* account is a windows account with administrator privileges to work with Metalogix Archive Manager for Exchange administration tools, run services, manage databases, manage extensions. It also has elevated privileges to interact with the on-premise or online Microsoft Exchange servers.

In this topic:

1. [Steps to create the superuser account](#)
2. [Steps to grant the superuser read permission for the Container node in the domain controller](#)
3. [Steps to add the superuser to the Administrators group in feature servers](#)
4. [Steps to add the superuser as a database user with sysadmin role](#) (for Windows authentication only)
5. [Steps to create a mailbox for the superuser in the Exchange server](#)
6. [Steps to grant the superuser elevated roles and permissions in the Exchange server](#)
7. [Steps to grant the superuser impersonation rights in the Exchange server](#) (for OWA)

## Steps to create a superuser account

1. Log in to the domain controller.
2. Navigate to **Start > Windows Administrative Tools > Active Directory Users and Computers**.
3. From the *Console Tree*, expand the domain node.
4. Click the **Users** container. The list of users opens in the right-hand pane.
5. Click the **Action** menu and select **New > User**. The *New Object - User* window opens.



New Object - User

Create in: democorp.com/Users

First name: MAM Initials:

Last name: Administrator

Full name: MAM Administrator

User logon name: mamadmin @democorp.com

User logon name (pre-Windows 2000): DEMOCORP\'\'mamadmin

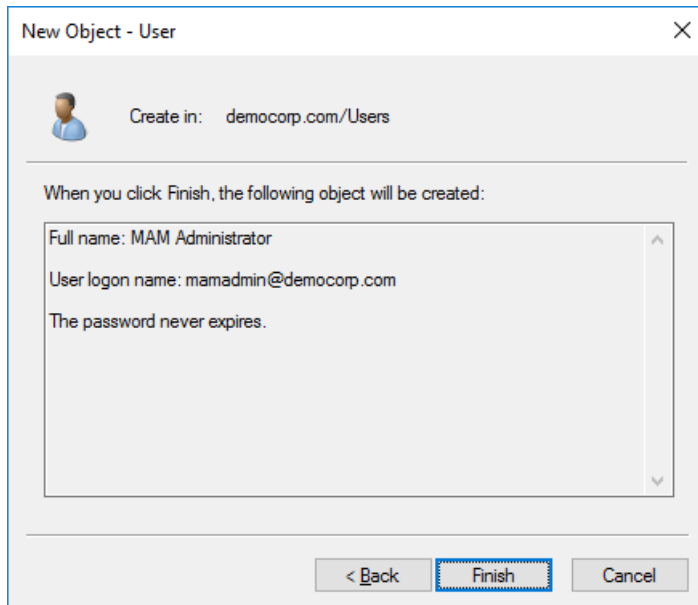
< Back Next > Cancel

6. Verify that **Create in** title indicates the appropriate domain name and container, and then enter the details of the superuser. For example:
  - a. Full name: **MAM Administrator**
  - b. User logon name: **mamadmin@democorp.com**
7. Click **Next**.
8. Enter the password and confirm it. Then select **Password never expires**. Uncheck all other



check boxes.

9. Click **Next**.

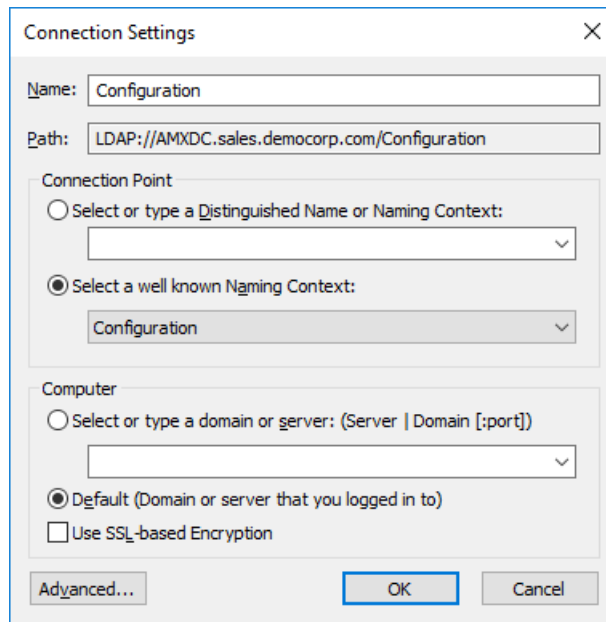


10. Verify the information and click **Finish**.

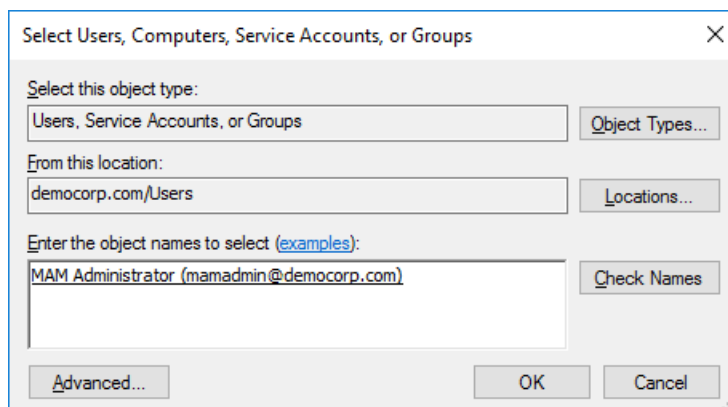
## Steps to grant the superuser read permission for the Container node in the domain controller

Microsoft Exchange servers and other information stores are created as child nodes under the *CN=Services,CN=Configuration,DC=<root domain>* node in the domain controller. The superuser needs sufficient permissions to read the list of Exchange servers and information stores of the organization. A read permission must be granted to the superuser to be able to access the object and all its descendant objects.

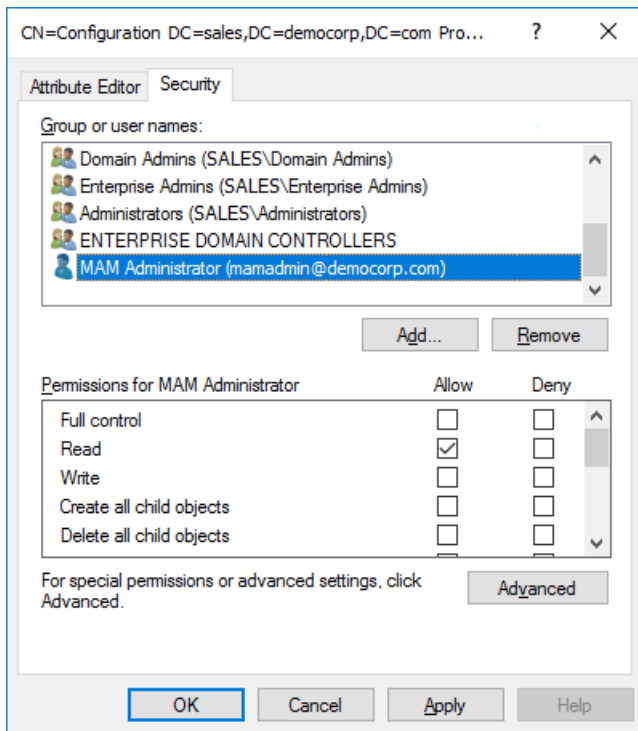
1. Log in to the domain controller.
2. Navigate to **Start > Windows Administrative Tools > ADSI Edit**.
3. Click the **Action** menu, and then click **Connect to**. The *Connection Settings* window opens.



4. In the *Connection Point* frame, choose **Select a well known Naming Context**. From the drop down list select **Configuration**.
5. Click **OK**. The **Configuration** context appears in the ADSI editor.
6. Expand or select the **Configuration** context to display the node (begins with *CN=Configuration*).
7. Right-click the node and select **Properties**.
8. In the properties window, click the **Security** tab, and then click **Add**.
9. In the **Enter the object name to select** field, enter the user logon name of the super user. For example, enter **democorp\mamadmin**.
10. Click **Check Names** to verify the logon name.



11. Click **OK** to add the superuser to the Administrator group.



12. Click **Advanced**. The *Advanced Security Settings for Configuration* window opens.
13. From the *Permissions* tab, select the superuser, and then click **Edit**. The *Permission Entry for Configuration* window opens.
14. In the **Applies To** drop down select **This object and all descendant objects**.
15. Click **OK**, and then click **OK** in each parent window to close all the windows.
16. Close the ADSI editor.

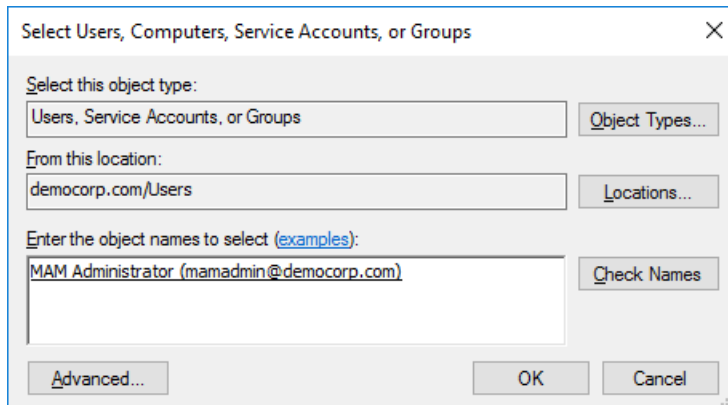
## Steps to add the superuser to the Administrators group in feature servers

The superuser must be able to run windows services and accomplish tasks that require administrator privileges on the Metalogix Archive Manager for Exchange feature servers. Follow the steps described below to grant administrator privilege to the superuser on each feature server.

1. Log in to each server with its local administrator credentials.
2. Navigate to **Start > Windows Administrative Tools > Computer Management**
3. From the Console Tree, navigate to the **System Tools > Local Users and Groups > Groups** container.
4. From the list of groups in the right-hand pane, right-click **Administrators** and select **Properties** from the context menu. The *Administrators Properties* window opens.
5. Click **Add**.
6. In the **Enter the object name to select** field, enter the user logon name of the super user. For

example, enter sales\mamadmin

7. Click **Check Names** to verify the logon name.



8. Click **OK** to add the superuser to the Administrator group.
9. In the *Administrators Properties* window, click **Apply** and **OK** to complete the process.

**i** **TIP:** Log out of the server and log in again with the superuser's credentials to quickly verify that the superuser can access the server.

## Steps to add the superuser as a database user with sysadmin role

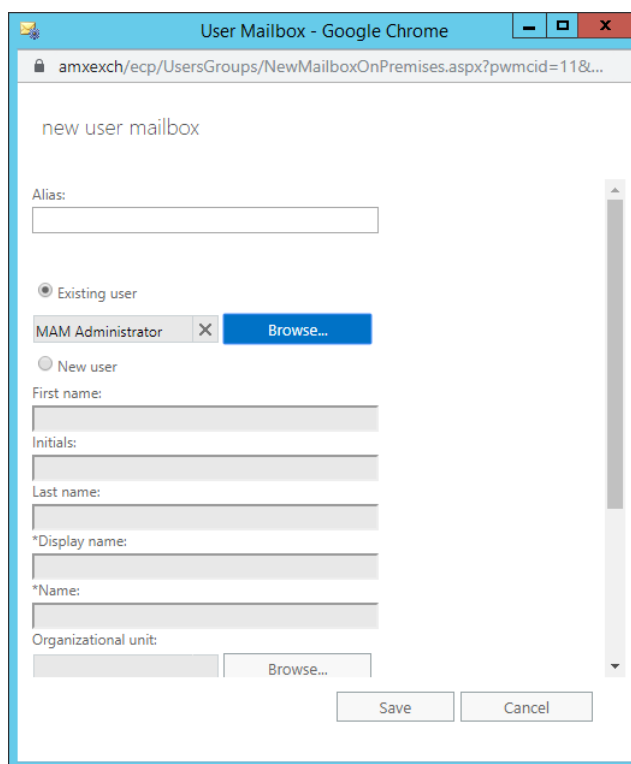
If you plan to use *Windows authentication* with a Microsoft SQL Server database, follow the steps described below:

1. Log in to the database server with your database administrator credentials.
2. Open the SQL Server Management Studio on your SQL server database server.
3. Log in to the server instance for Metalogix Archive Manager for Exchange databases.
4. Open the **Security** folder.
5. Right-click on the **Logins** folder and select **New Login**. The *Login - New user* properties window appears.
6. If you want to assign rights to a Windows account, select **Windows authentication**.
7. Provide the login name in the text box. You can use the **Browse** button to select an existing account if you chose Windows authentication (eg. **democorp\mamadmin**)
8. In the user properties window, click **Server Roles** from the *Select a page* panel and select the check box **Sysadmin**.
9. Click **OK** to create the account.

**i** **NOTE:** Follow the above steps to add the installer account (eg. **democorp\domadmin**) with the **Sysadmin** role.

# Steps to create a mailbox for the superuser in the Exchange server

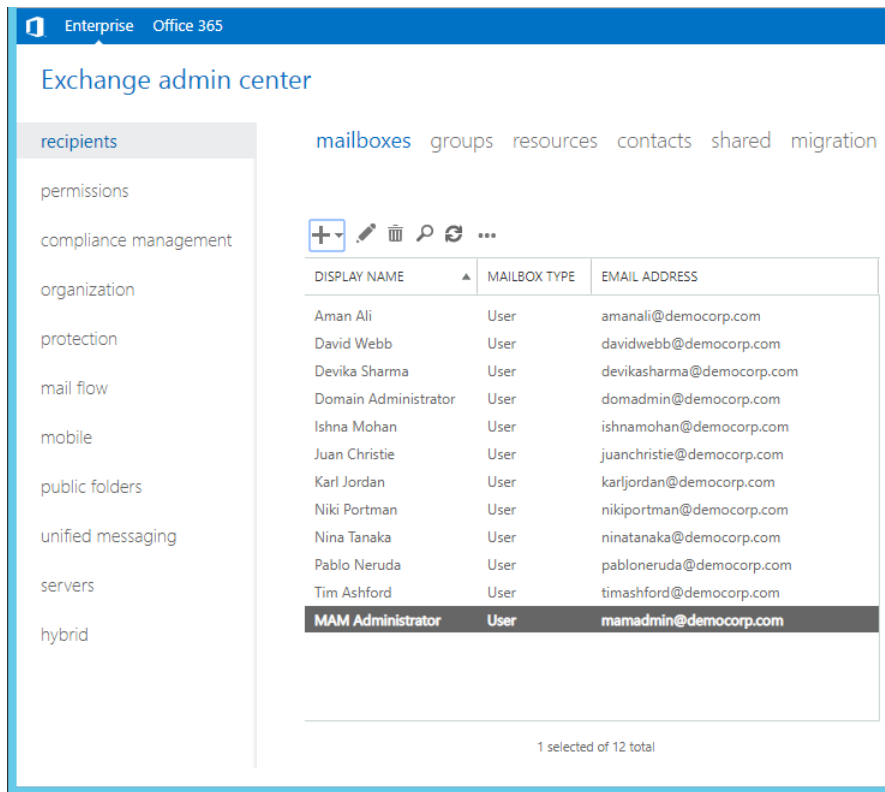
1. Open the *Exchange Administrative Center (EAC)* with your exchange administrator credentials.
2. Navigate to **recipients > mailboxes**
3. Click **+** and select the **User mailbox** option from the menu. The *new user mailbox* page opens.
4. Select **Existing user** and then click **Browse**. The *Select User - Entire Forest* page opens.
5. If you don't see the superuser in the list, search for the name. Select the superuser and click **OK**.



The screenshot shows a web browser window titled "User Mailbox - Google Chrome" with the URL "amxexch/ecp/UsersGroups/NewMailboxOnPremises.aspx?pwmcid=118&...". The page is titled "new user mailbox". It features a form with the following elements:

- An "Alias:" text input field.
- Two radio buttons: "Existing user" (selected) and "New user".
- Under "Existing user", there is a text box containing "MAM Administrator" with a close button (X) and a blue "Browse..." button.
- Under "New user", there are text input fields for "First name:", "Initials:", "Last name:", "\*Display name:", and "\*Name:".
- An "Organizational unit:" text input field with a "Browse..." button.
- At the bottom right, there are "Save" and "Cancel" buttons.

6. Click **Save**. The superuser mailbox appears in the mailboxes list.



## Steps to grant the superuser elevated roles and permissions in the Exchange server

Archive Manager for Exchange requires that the super-user be granted some administrative permissions and access to the mailboxes which will be archived. The steps described below use Powershell scripts to grant the roles and permissions to the superuser. To grant roles and permissions to the superuser, follow the steps described below:

1. In Exchange Server, open the *Exchange Management Shell*.
2. Grant the roles and to ensures that the mailboxes and public folders can be accessed using the required administrative privileges.

### a. Grant the **Organization Management** role

```
Add-RoleGroupMember -Identity "Organization Management" -Member "mamadmin@democorp.com"
```

### b. Grant the **View-Only Organization Management** role.

```
Add-RoleGroupMember -Identity "View-Only Organization Management" -Member "mamadmin@democorp.com"
```

### c. Grant the **Public Folder Management** role.

```
Add-RoleGroupMember -Identity "Public Folder Management" -Member "mamadmin@democorp.com"
```

### d. Grant **Receive-As** permissions to all mailboxes

```
Get-MailboxDatabase | Add-ADPermission -User "mamadmin@democorp.com" -
AccessRights ExtendedRight -ExtendedRights Receive-As, ms-Exch-Store-
Admin -InheritanceType "All"
```

## Steps to grant the superuser impersonation rights in the Exchange server

This step is required if you plan to access archived emails through OWA.

**i** **NOTE:** To install and configure the OWA extension for Metalogix Archive Manager for Exchange, you must run the *Archive Manager OWA Extension Setup* on Exchange Server. For more information see the *OWA Installation Guide*.

1. In Exchange Server, open the *Exchange Management Shell*.
2. Grant the **Impersonation** permission

```
New-ManagementRoleAssignment -Name "Impersonation-MAM4Exchange" -Role
"ApplicationImpersonation" -User "srv_exchange"
```

## Modify the Exchange server throttling policy

Exchange Server uses client throttling policies to track the bandwidth that each user consumes and enforces bandwidth limits as necessary. Metalogix Archive Manager for Exchange needs more resources than the allowed limit, so the throttling policy must be changed for the superuser.

To change the throttling policy in the Exchange server (for example, AMXEXCH), open the *Exchange Management Shell* and run the following commands:

```
New-ThrottlingPolicy AMXEXCH
```

```
Set-ThrottlingPolicy AMXEXCH -EwsCutoffBalance Unlimited -EwsMaxBurst
Unlimited -EwsMaxConcurrency Unlimited -EwsMaxSubscriptions Unlimited -
EwsRechargeRate Unlimited -RcaMaxConcurrency Unlimited -RcaCutoffBalance
Unlimited -RcaMaxBurst Unlimited -RcaRechargeRate Unlimited -
CpaMaxConcurrency Unlimited -CpaCutoffBalance Unlimited -CpaMaxBurst
Unlimited -CpaRechargeRate Unlimited
```

```
Set-Mailbox "mamadmin@democorp.com" -ThrottlingPolicy AMXEXCH
```

## Setup the Organizational Forms Library

Metalogix Archive Manager for Exchange stores email templates in a system folder called the Organizational Forms Library. The templates are used to display archived emails to end users. Before you can create the Organizational Forms Library folder in your Exchange server, you must first create a *public folder mailbox*. Public folder mailboxes contain the hierarchy information as well as the content for public folders. The first public folder mailbox that you create in the organization is the primary hierarchy mailbox, which automatically sets up two folders: the

IPM\_SUBTREE and the NON\_IPM\_SUBTREE. An Organizational Forms Library is a system folder that is stored in the public folder called the EFORMS REGISTRY which is a sub-folder of the NON\_IPM\_SUBTREE system folder. There can be several forms libraries, one for each language.

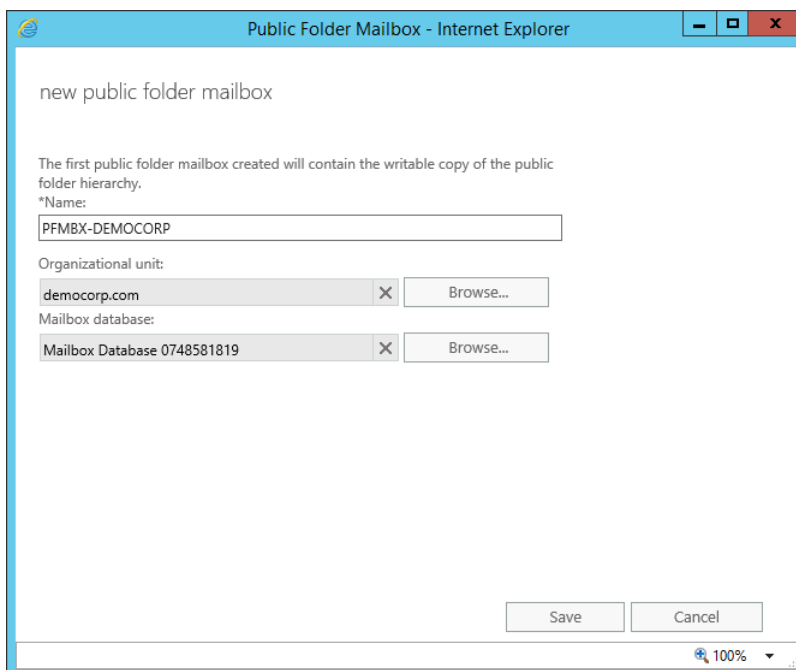
In this topic:

- [Steps to create a public folder mailbox](#)
- [Steps to create the public folder Organization Forms Library](#)
- [Steps to add the superuser as the owner of the Organizational Forms Library](#)
- [Verify that the superuser has access to the Organizational Forms Library](#)

## Steps to create a public folder mailbox

**i** **NOTE:** This must be a *primary hierarchy mailbox* which is the first public folder mailbox in the organization and hosts the primary hierarchy. The primary hierarchy is the only writable copy of the hierarchy.

1. Open the *Exchange Administrative Center (EAC)* with your exchange administrator credentials.
2. Navigate to **Public folders > Public folder mailboxes**, and then click the **new public folder mailbox** icon +



3. In the **new public folder mailbox** window that opens, enter the following information:
  - a. **Name:** Enter the name for the public folder mailbox. For example, enter **PFMBX-DEMOCORP**
  - b. **Organizational unit:** Click Browse to select the location in the Active Directory where the mailbox object is created. If you don't select an organizational unit, the public folder mailbox will be created in the default container for mailboxes.



- c. **Mailbox database:** Click Browse to select the mailbox database where the mailbox is created. If you don't select a mailbox database, it will be automatically assigned.
4. Click **Save**.
5. Verify that the mailbox appears in the public folder mailbox list.

## Steps to create the public folder Organization Forms Library

1. In Exchange Server, open the *Exchange Management Shell*.
2. To create a new public folder in the NON\_IPM\_SUBTREE directory that's named Organizational Forms Library, run the following command:

```
New-PublicFolder -Path "\NON_IPM_SUBTREE\EFORMS REGISTRY" -Name  
"Organizational Forms Library"
```

3. To set the locale ID on the folder that you created, run the following command:

```
Set-PublicFolder "\NON_IPM_SUBTREE\EFORMS REGISTRY\Organizational Forms  
Library" -EformsLocaleID EN-US
```

4. To determine the correct locale ID to use, see [Languagecode Field](#).

## Steps to add the superuser as the owner of the Organizational Forms Library

1. In Exchange Server, open the *Exchange Management Shell*.
2. To add the superuser as the owner of the Organizational Forms Library folder so that the superuser can publish or create forms in the library, run the following command:

3. 

```
Add-PublicFolderClientPermission "\NON_IPM_SUBTREE\EFORMS  
REGISTRY\Organizational Forms Library" -User mamadmin@democorp.com -  
AccessRights Owner
```

**i** **NOTE:** If you're not sure about the name of the Organizational forms library in your company, the following command can be used. It will owner rights to the child objects under EFORMS REGISTRY:

```
Get-PublicFolder -Identity "\NON_IPM_SUBTREE\EFORMS REGISTRY" -  
GetChildren | Add-PublicFolderClientPermission -User  
mamadmin@democorp.com -AccessRights Owner
```

4. Wait some time for replication to occur until the super-user is assigned owner rights to the Organizational Forms library.

## Verify that the superuser has access to the Organizational Forms Library

1. Open Outlook with the superuser account.
2. Click **Home** / **New Items** / **More Items** / **Choose Form**.
3. In the **Look in** down-drop box verify that the *Organizational Forms Library* exists.

## Prepare the Application Servers

In this topic:

### For the Archive Manager Database server (AMXDB)

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

### For the HSM and Search server (AMXHSM)

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

### For the Archive server (AMXSERVER-A)

- [Steps to download the install media](#)
- [Steps to install the prerequisites](#)
- [Steps to assign DCOM access and launch permissions](#)
- [Steps to install Microsoft Outlook](#)

### For Retrieve server (AMXSERVER-R)

- [Steps to download the install media](#)
- [Steps to install the prerequisites](#)
- [Steps to assign DCOM access and launch permissions](#)
- [Steps to install Microsoft Outlook](#)

**i** | **TIP:** We recommend completing all these tasks using the installer 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 Exchange (for Archive and Retrieve servers)

```
Install-WindowsFeature -Name Web-Server, Web-Http-Redirect, Web-Dyn-Compression, Web-Windows-Auth, Web-Basic-Auth, Web-Metabase, Web-Mgmt-Service, RSAT-AD-PowerShell, 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](#) chapter to modify the script for other supported Windows operating systems or install them manually.

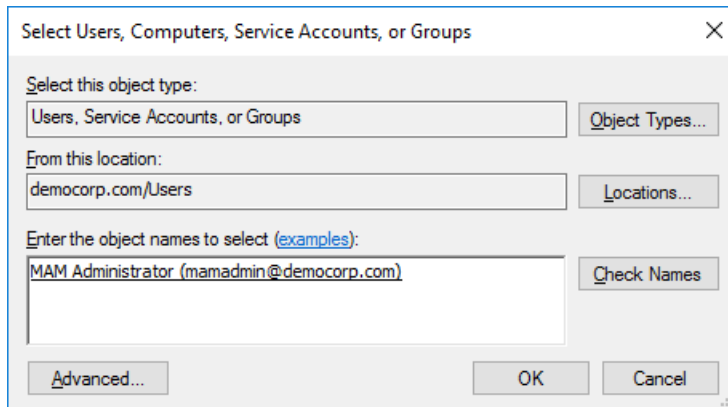
4. Install the database drivers. For Microsoft SQL Server, the database driver is available in the folder <installation folder>\Archive Manager Installation Package\Install.
5. Install the redistributable packages required for your operating system. These files are available in the folder <installation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

# Steps to assign DCOM access and launch permissions

## Add the superuser to the Distributed COM Users group

1. Right-click **Start > Computer Management**.
2. From the *Console Tree*, go to **System tools > Local Users and Groups > Groups**.
3. From the *Groups* list, select an double-click **Distributed COM Users**. The *Distributed COM Users Properties* window opens.
4. From the *General* tab click **Add**.

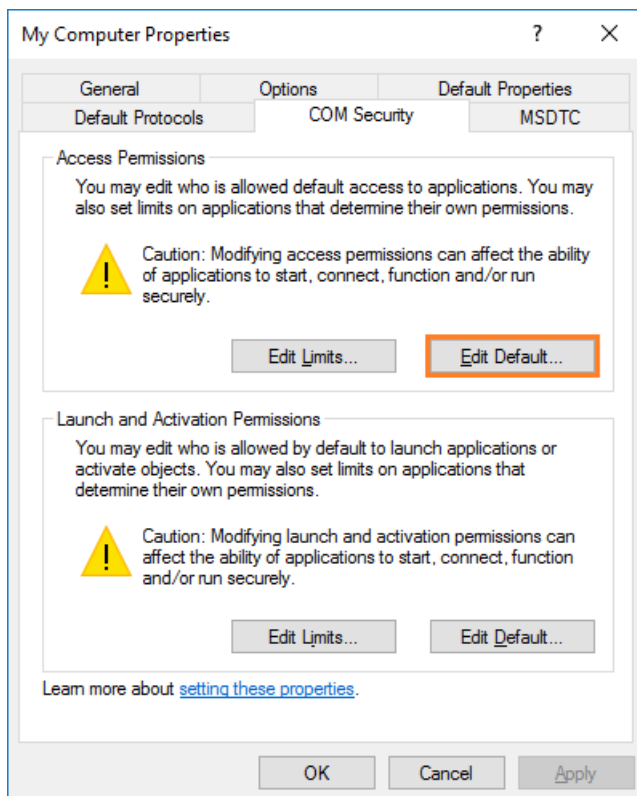
5. In the **Enter the object name to select** field, enter the user logon name of the superuser. For example, enter **democorp\mamadmin**.



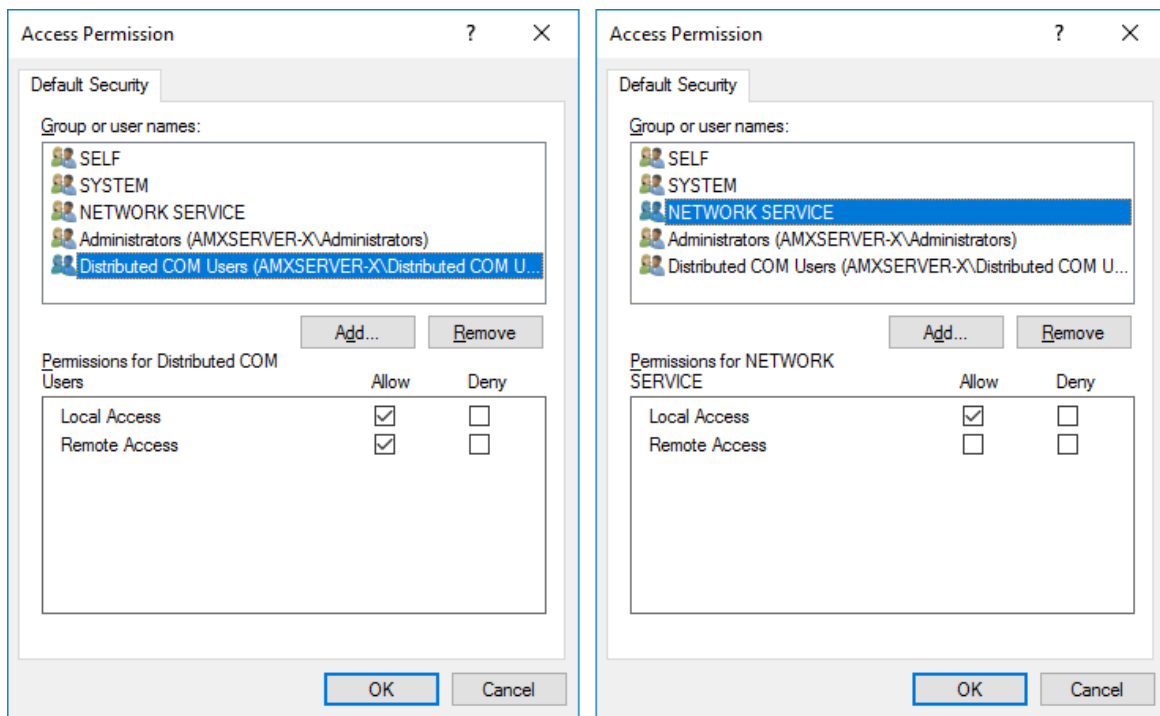
6. Click **Check Names** to verify the logon name and then click **OK** to add the superuser to the members list.
7. Click **OK** to close the *Distributed COM Users Properties* window, and then close the *Computer Management* console.

## Grant Access and Launch Permissions

1. Open **Start > Windows Administrative Tools > Component Services**.
2. From the *Console Tree*, go to **Component Service > Computers > My Computer**.
3. Right-click **My Computer** and select **Properties** from the context menu. The *My Computer Properties* window opens.



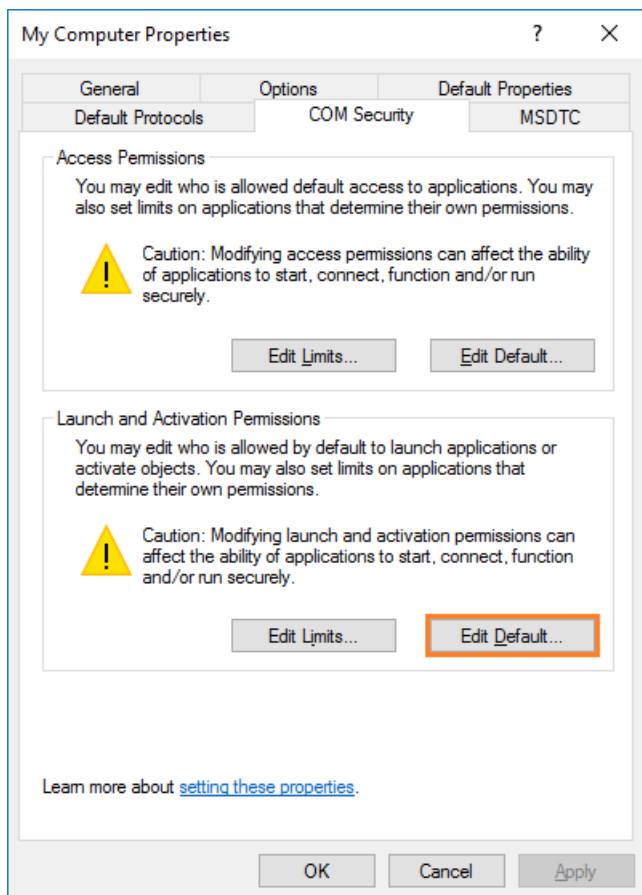
4. Open the **COM Security** tab and click **Edit Default**. The *Access Permissions* window open.
5. Click **Add**. The *Select users or Groups* window opens.
6. Click **Locations** and select the Archive Manager server (for example, AMXSERVER-A)
7. Search and add the following:
  - a. **Distributed COM Users**
  - b. **NETWORK SERVICE**
8. Select **Distributed COM Users** from the list.
9. In the *Permissions for Distributed COM Users* section, select **Allow** for both **Local Access** and **Remote Access**.
10. Select **NETWORK SERVICE** from the list.
11. In the *Permissions for Distributed COM Users* section, select **Allow** for **Local Access** only.



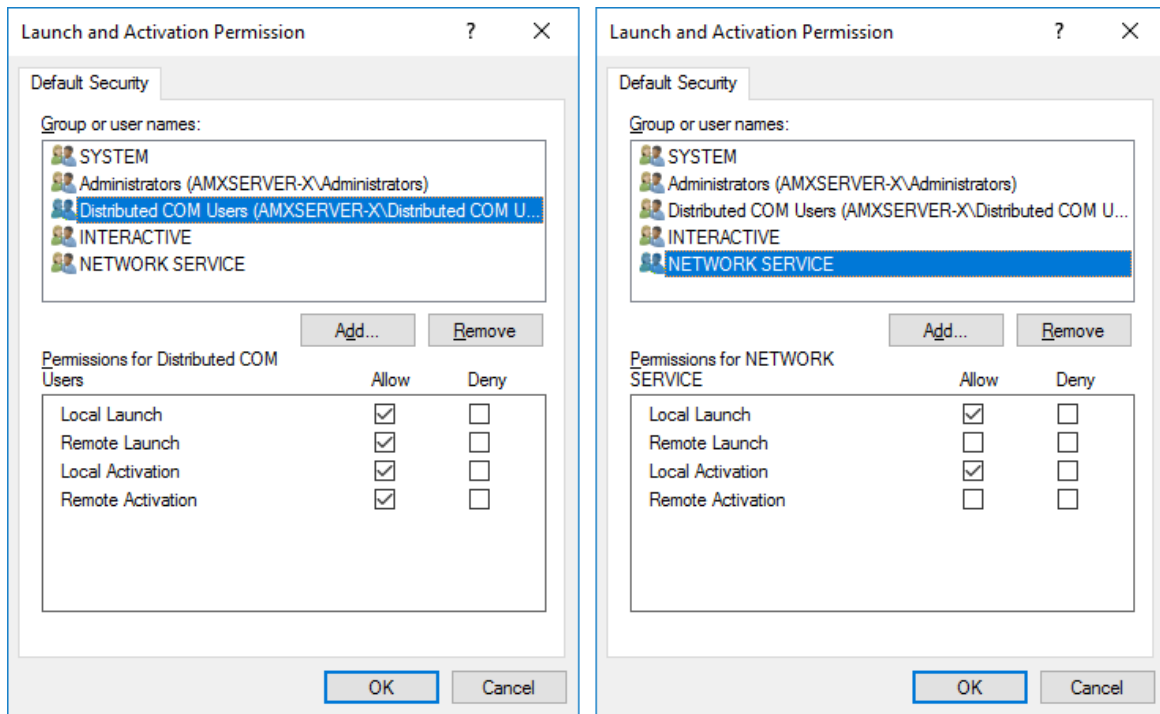
12. Click **OK** to close the *Access Permissions* window.
13. Keep the *My Computer Properties* window open and continue with the instructions below.

## Grant Launch and Activation Permissions to the Distributed COM Users group

1. From the *My Computer Properties* window verify that the **COM Security** tab is opened.



2. Click **Edit Default**. The *Access Permissions* window open.
3. Click **Add**. The *Select users or Groups* window opens.
4. Click **Locations** and select the Archive Manager server (for example, AMXSERVER-A)
5. Search and add the following:
  - a. **Distributed COM Users**
  - b. **NETWORK SERVICE**
6. Select **Distributed COM Users** from the list.
7. In the *Permissions for Distributed COM Users* section, select **Allow** for **Local Launch**, **Remote Launch**, **Local Activation** and **Remote Activation**.
8. Select **NETWORK SERVICE** from the list.
9. In the *Permissions for Distributed COM Users* section, select **Allow** for **Local Launch** and **Local Activation** only.



10. Click **OK** to close the *Access Permissions* window.

11. Close the *Component Services* console.

## Steps to install Microsoft Outlook

The Metalogix Archive Manager Server communicates with on-premise and online Microsoft Exchange servers via MAPI. To provide your Archive Manager server with a MAPI subsystem, install Outlook with full Unicode compatibility. See [System Requirements](#) for version compatibility with your Microsoft Exchange servers.

## Steps to download the install media

1. Login to the server with the credentials of the **superuser** (eg. **democorp\mamadmin**)
2. From your browser, navigate to the <https://www.quest.com/products/metalogix-archive-manager-for-exchange> page  
or  
navigate to the <http://www.quest.com/trials> page. Locate the product Metalogix Archive Manager for Exchange.
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 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 Exchange features.

## Install the Application Features

This topic describes the manual installation steps for each feature and feature that comprises a single-server installation.

In this topic:

- [Install HSM](#)
- [Install Archive Manager Search](#) (with Post-processing)
- [Install the Archive server](#)
- [Install the Retrieve 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.

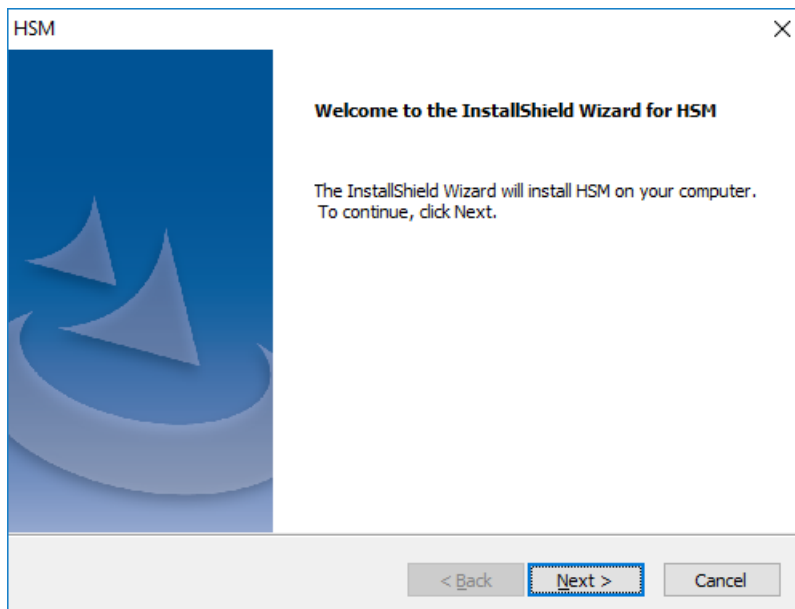
Item	Description	Example
HSM server	The server where the HSM and Archive Manager Search will be installed.	AMXHSM



Superuser account	Windows account that is used to install the application and run the Archive Manager for Exchange services.	username: democorp\mamadmin 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.	AMXDB

## Steps to install the application

1. Log in to the server (eg. **AMXHSM**) with the credentials of the **superuser** (eg. **democorp\mamadmin**)
2. Download the installation media. For more information see [Steps to download the install media](#).
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.



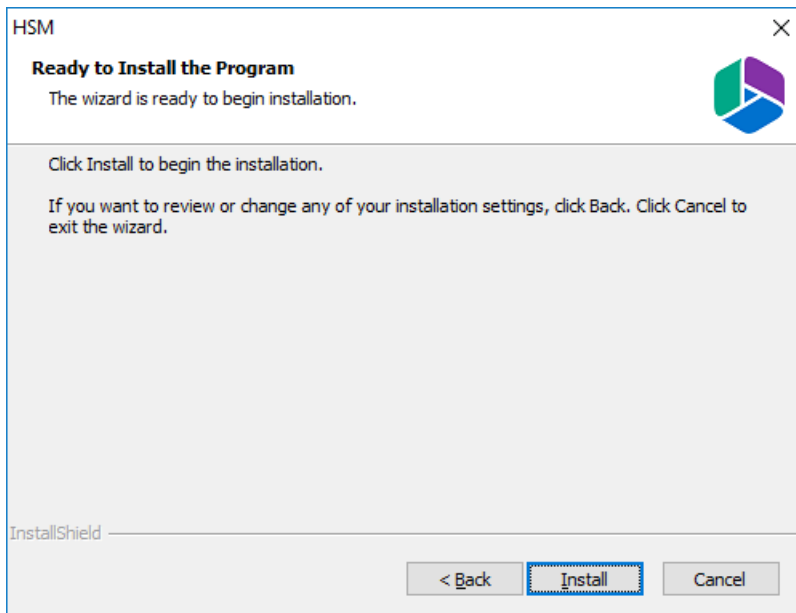
8. Click **Next**. The *Logon Information* window opens.

Enter the information as described below:

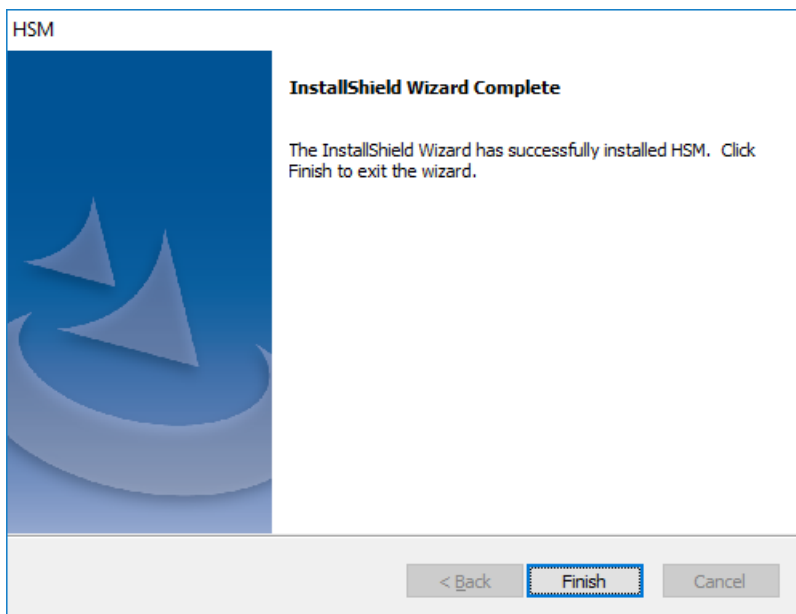
- a. **User name** - logon name of the superuser (for example, democorp\mamadmin)
  - b. **Password** - logon password of the superuser
  - c. **Confirm password** - same as the Password.
9. Click **Next**. The *Firewall Settings* window opens.

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

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



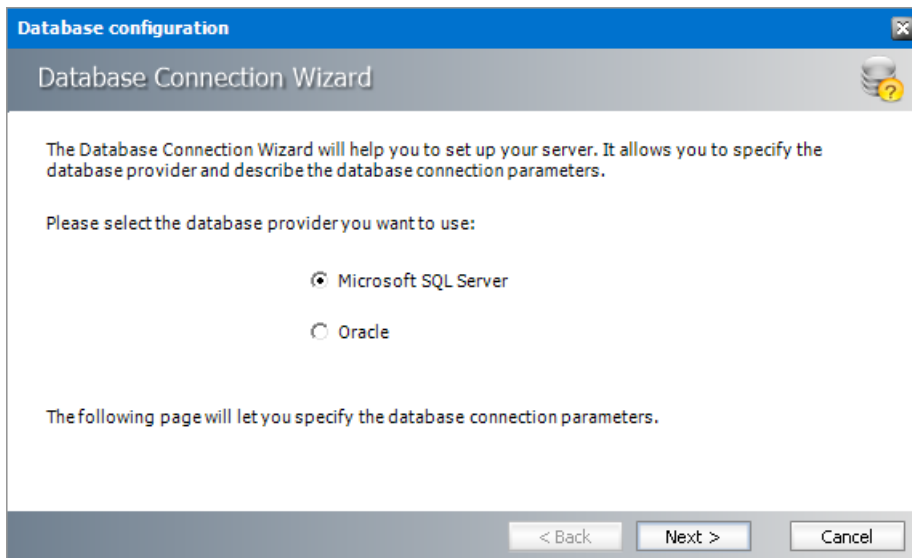
11. Click **Install**. The installation starts and the progress is displayed on the *Setup Status* window. When the installation completes, the *InstallShield Wizard Complete* window opens.



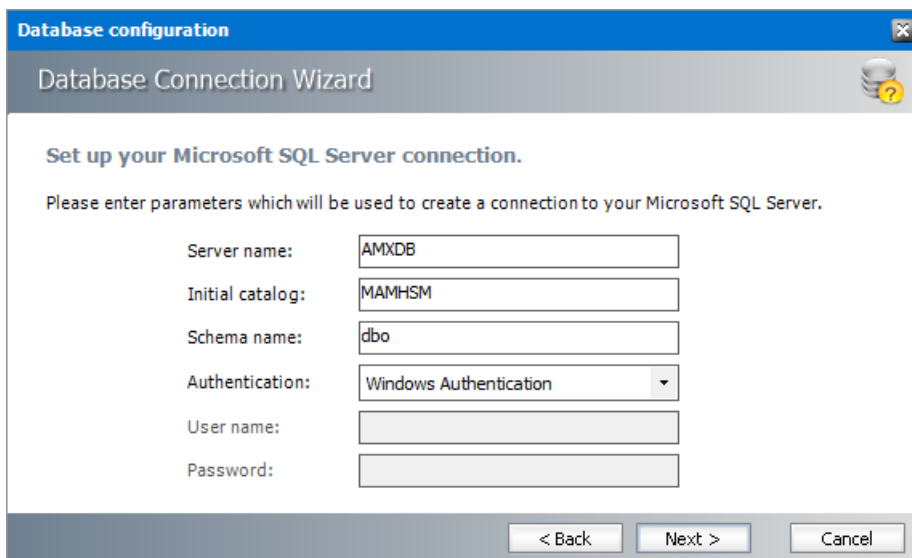
12. Click **Finish** to close the installer.

## 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.

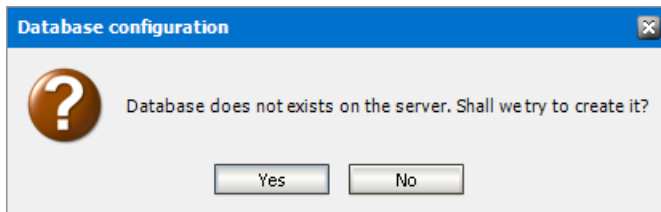


*For Microsoft SQL Server*

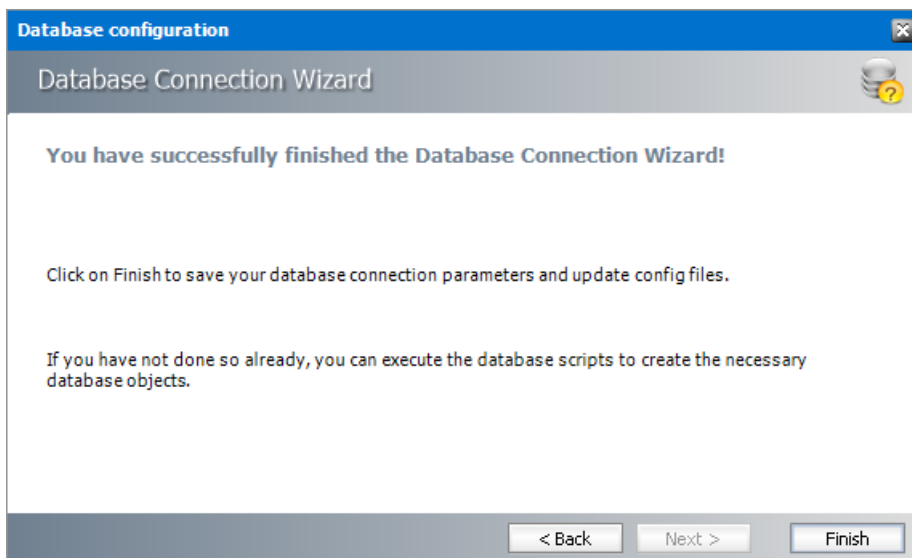
- a. **Server name** - name of the SQL server (eg. **AMXDB**)
- b. **Initial catalog** - name of the HSM database (e.g. **MAMHSM** which is the default name of the HSM database)
- c. **Schema name** - name of the SQL Schema (e.g. **dbo**)
- d. **Authentication** – authentication type used for the database. 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.



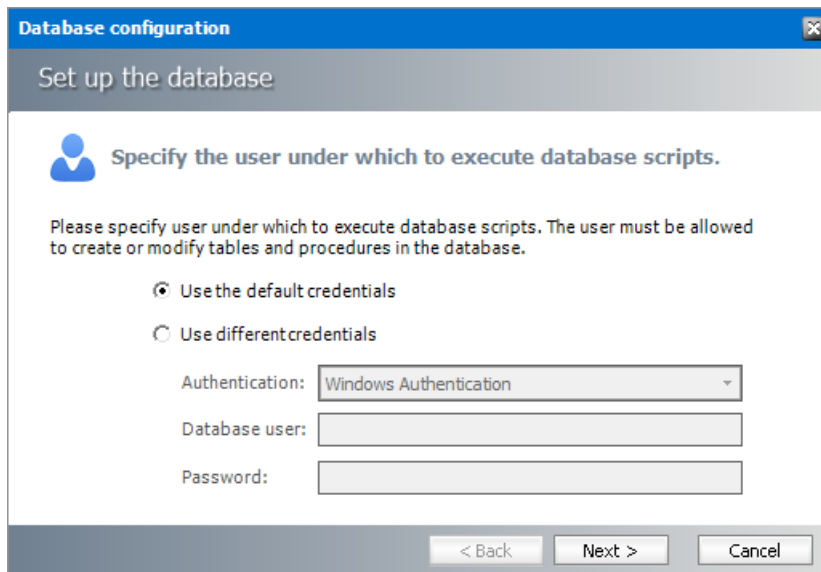
6. If the database connection is setup successfully, the configuration completion window opens.



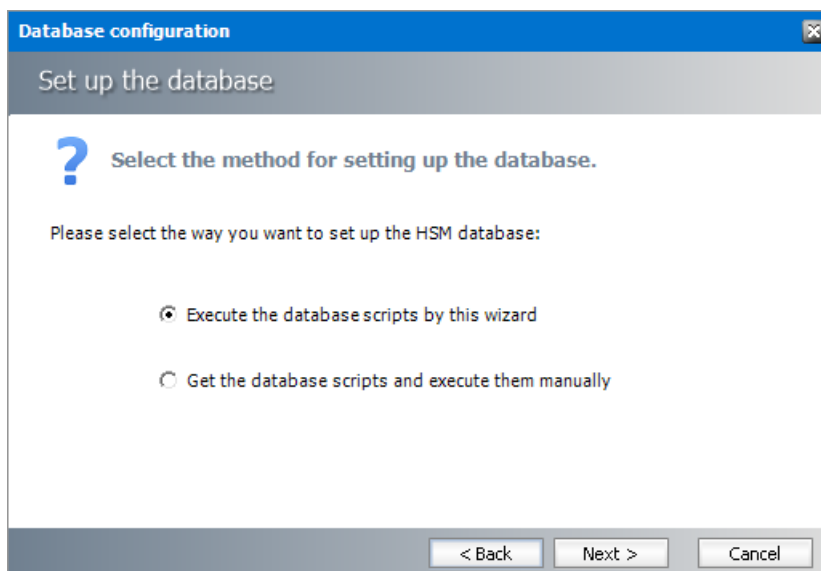
7. Click **Finish** to close the *Database Connection* wizard.

## 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 **Run 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**.

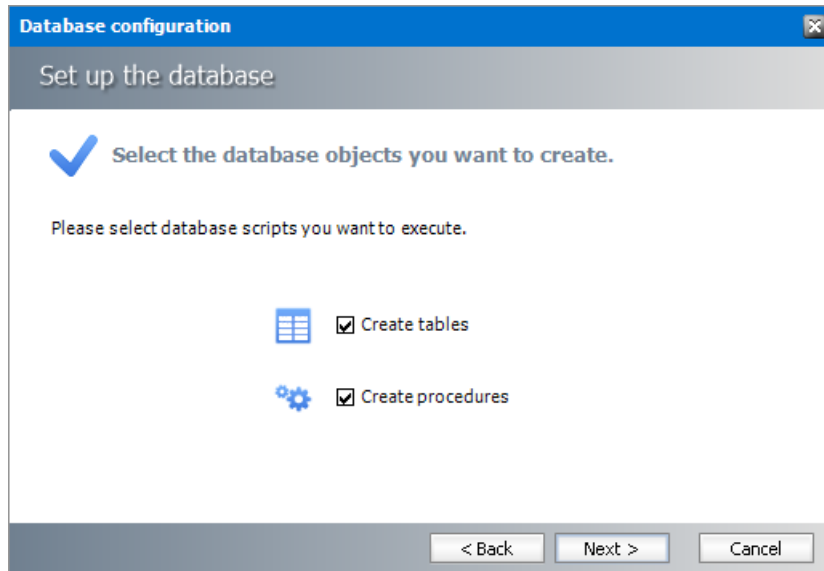


In the *Select the method for setting up the database* step, choose one of the following options:

- 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.

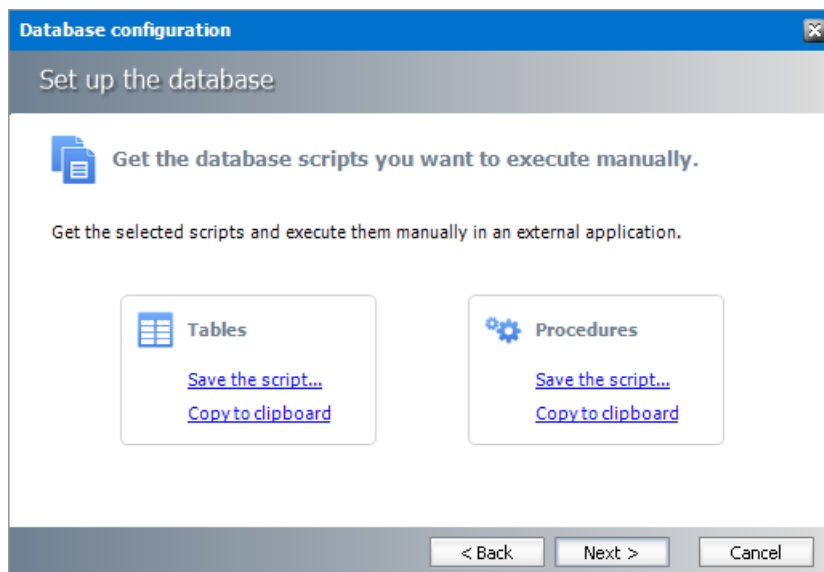
- b. **Get the database scripts and run them manually** - you get the option to either save the scripts or copy it to clipboard and paste it elsewhere.
5. Click **Next**. Depending on your selection, one of the following windows open:

***For Run the database scripts by this wizard***



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

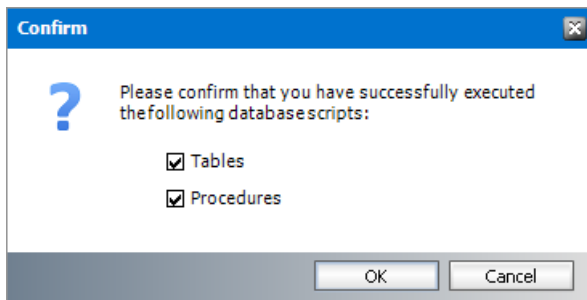
***For Get the database scripts and run them manually***



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

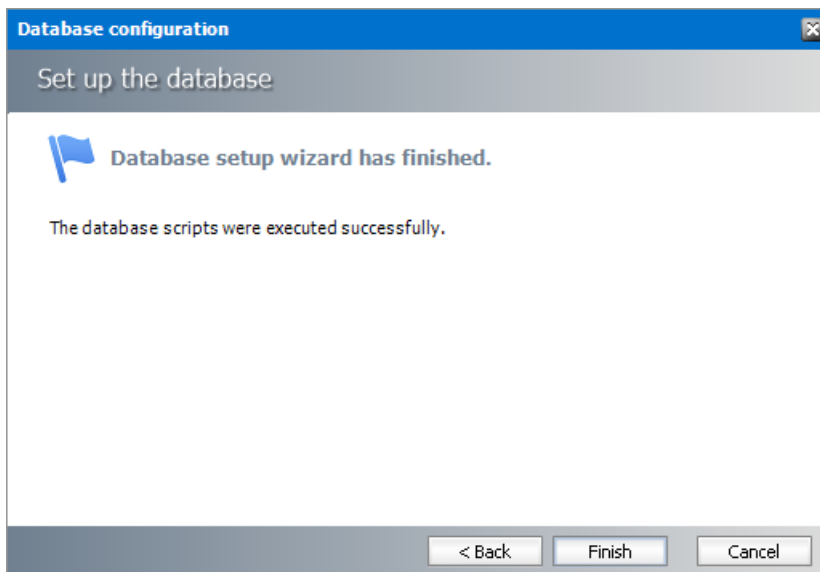
6. Click **Next**. Depending on your selection in step 4, one of the following windows open
  - a. If you chose **Run the database scripts by this wizard**, and the installation is successful, a confirmation dialog opens. Click **OK** to close the dialog.
  - b. If you chose **Get the database scripts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



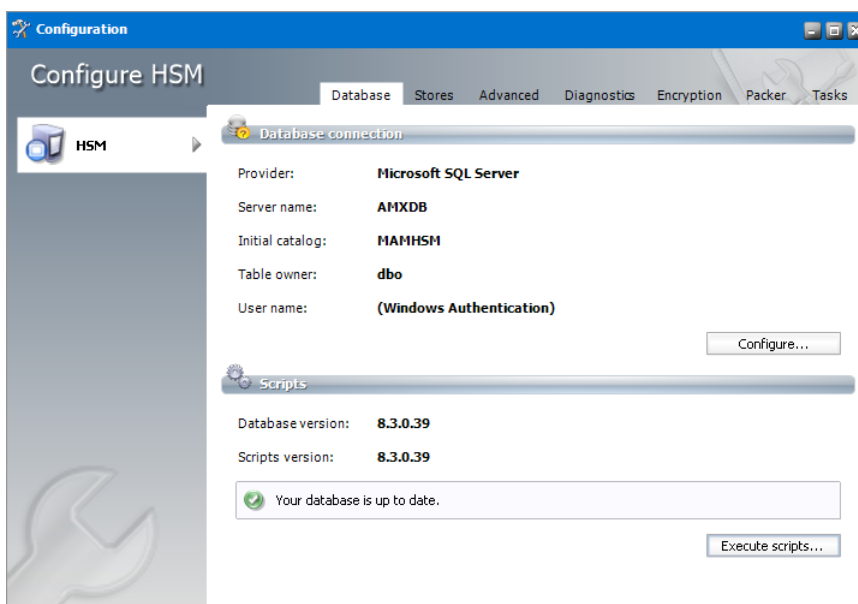


Select both check boxes after you run scripts and click **OK**.

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



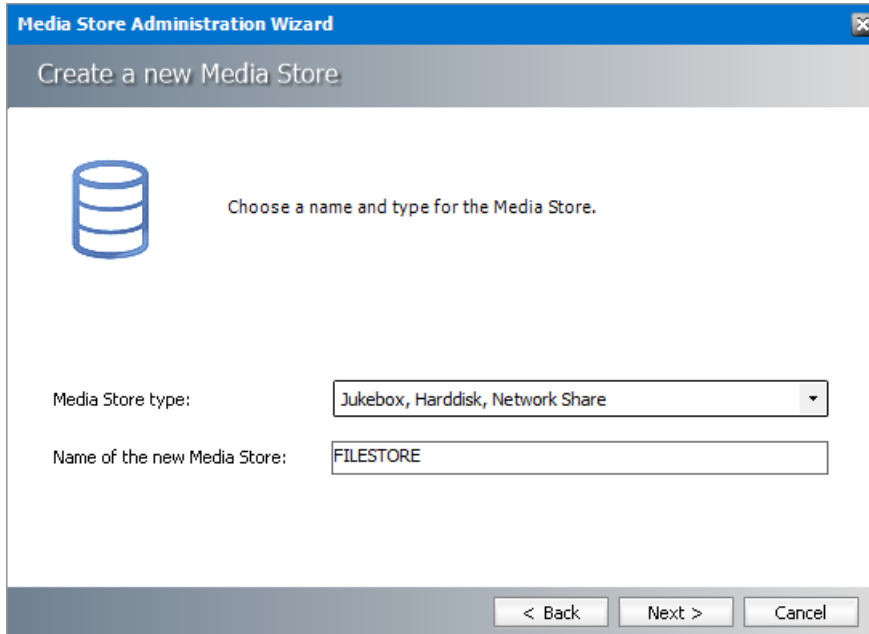
8. Click **Finish** to close the script installer. The *Scripts* section of the *Configuration* wizard displays the status and version of the scripts (the version of the scripts you install may differ from the version shown in the image below).



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

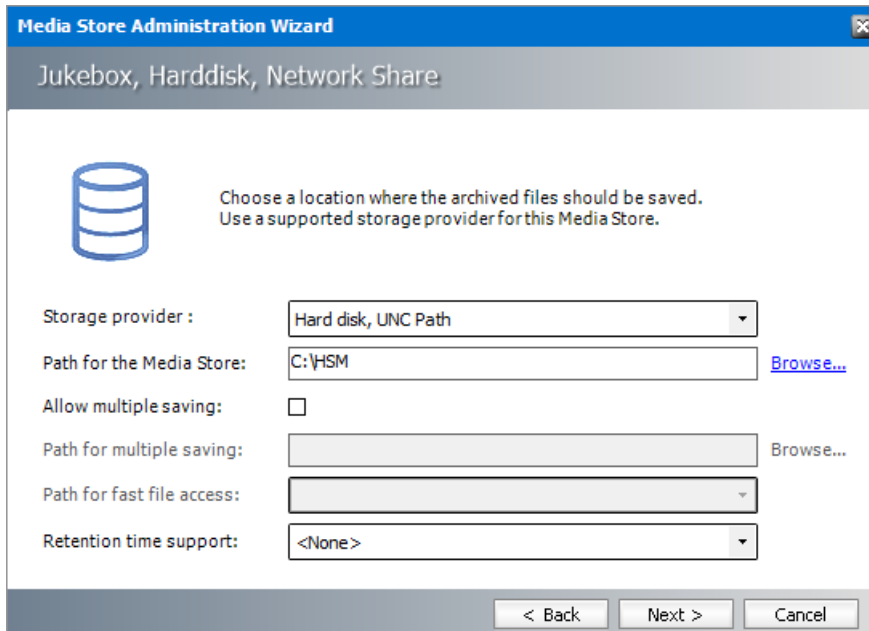
## Steps to configure the HSM stores and schemas

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 are two input fields: 'Media Store type:' with a dropdown menu showing 'Jukebox, Harddisk, Network Share', and 'Name of the new Media Store:' with a text box containing 'FILESTORE'. At the bottom, there are three buttons: '< Back', 'Next >', and 'Cancel'.

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

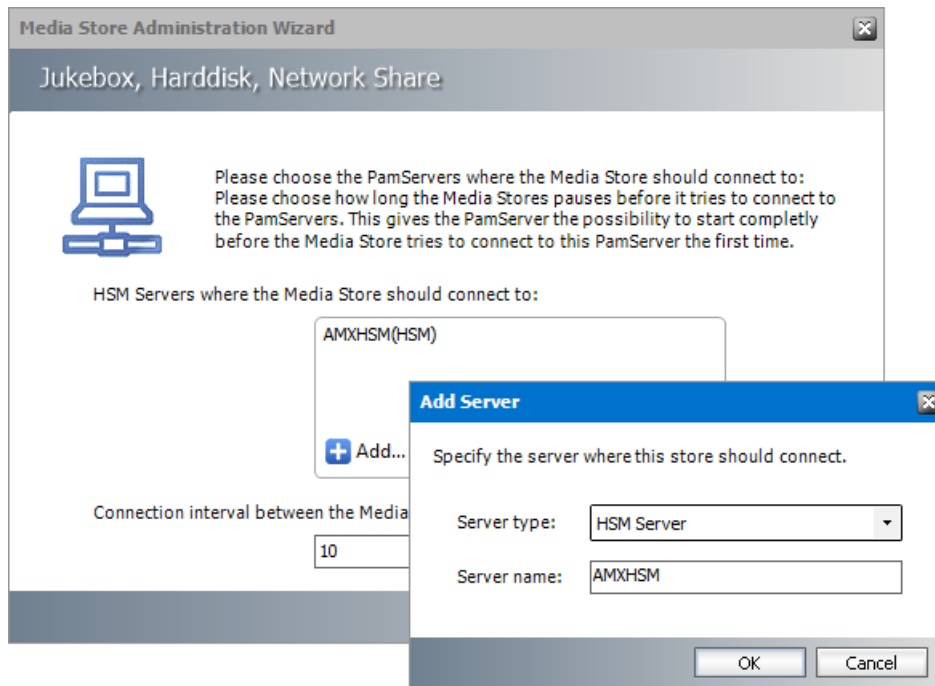


The screenshot shows the 'Media Store Administration Wizard' window with the title 'Jukebox, Harddisk, Network Share'. It features a database icon and the instruction 'Choose a location where the archived files should be saved. Use a supported storage provider for this Media Store.' Below this, there are several input fields: 'Storage provider :' with a dropdown menu showing 'Hard disk, UNC Path', 'Path for the Media Store:' with a text box containing 'C:\HSM' and a 'Browse...' button, 'Allow multiple saving:' with an unchecked checkbox, 'Path for multiple saving:' with a text box and a 'Browse...' button, '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'.

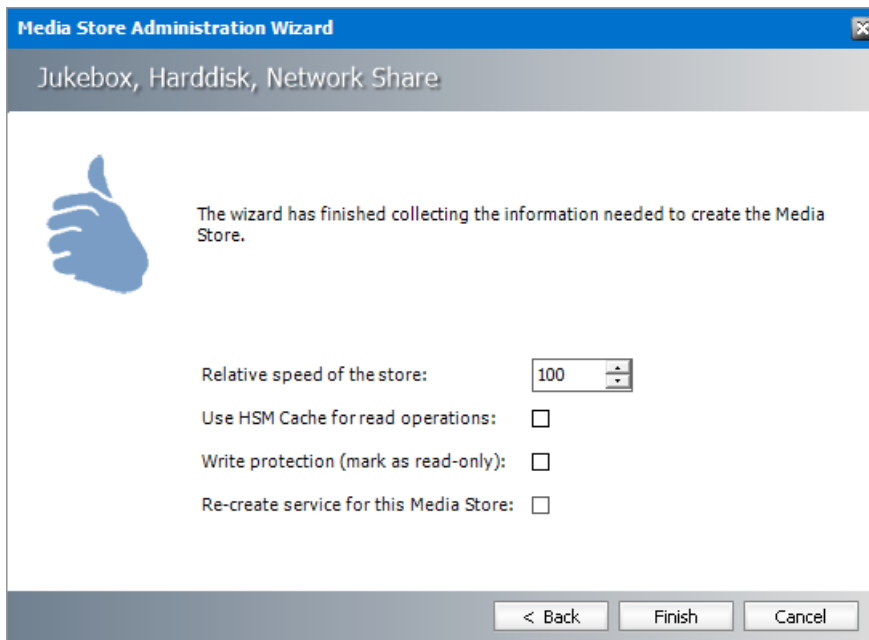
Enter the information as described below;

- a. **Storage Provider** - select Harddisk, UNC Path because we are going to setup a media store in folder on the local hard drive.

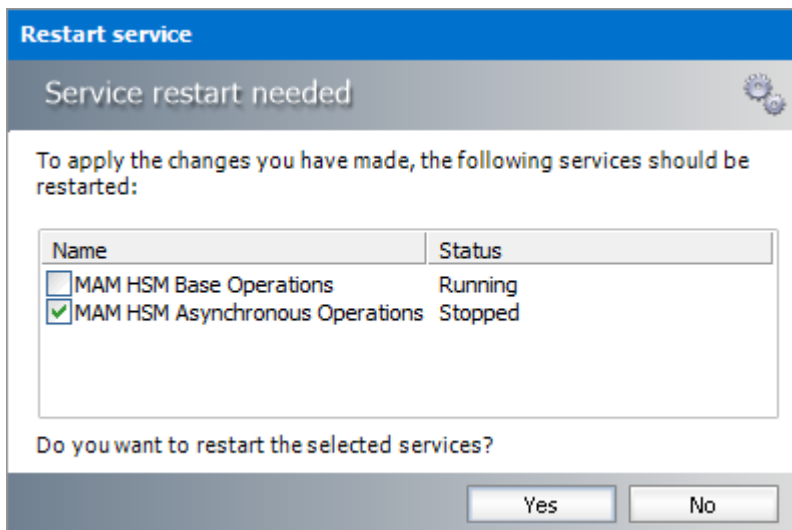
- b. **Path for the media store** - Browse and create the folder if it does not exist (eg. **C:\HSM**). You could specify a UNC path to a shared folder as well.
4. Keep clicking **Next** to accept the default settings on each window until you reach the HSM server connection information window. Every 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 Exchange - 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. **AMXHSM**)
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 the *Configuration* wizard, click **New Schema**. The *Create new schema* window opens.

**HSM Schema**

Create new schema

Store: FILESTORE@AMXHSM

Schema name: FILESCHEMA

Enforce store: ☐

Encryption: <none>

Task: <none>

Compression: ☐

Exclude files: .gz;.zip;.rar;.jpg  
Use ";" as separator and include the "." in extensions.  
Example: .zip;.jpg;.rar

Packer: <none>

OK Cancel

Enter the following information:

- a. **Store field** - verify that it indicates the media store you just created.
  - b. **Schema name** - enter a name for the schema (eg. **FILESCHEMA**)
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.

**Configuration**

Configure HSM

Database Stores Advanced Diagnostics Encryption Packer Tasks

**Stores**

ID	Name	Server	Mirror of	State
1	FILESTORE	AMXHSM		Running

+ New store - Set up... - Delete | Primary | Manage... | Refresh

**Schemas**

ID	Name	Store	Server	Force Store	Encryption Key	Compression	Task
1	FILESCHEMA	FILESTORE	AMXHSM				

+ Create... - Edit... - Delete | Test... | Refresh

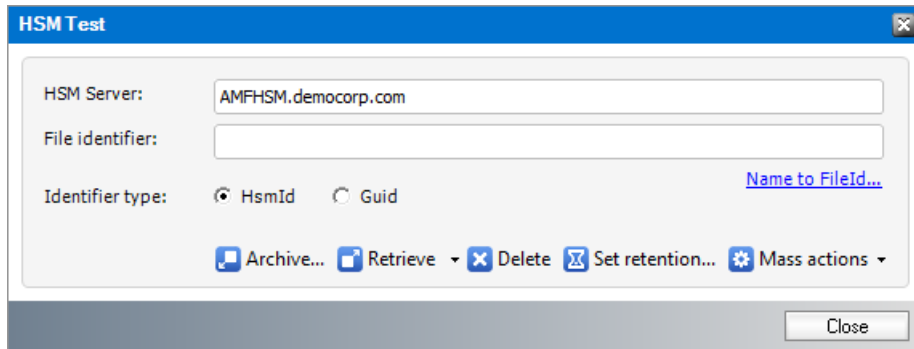
13. Close the *Configuration* wizard.

**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 Exchange are described in the *Media Store Administration Guide*.

## Steps to test the HSM and Media Store connectivity

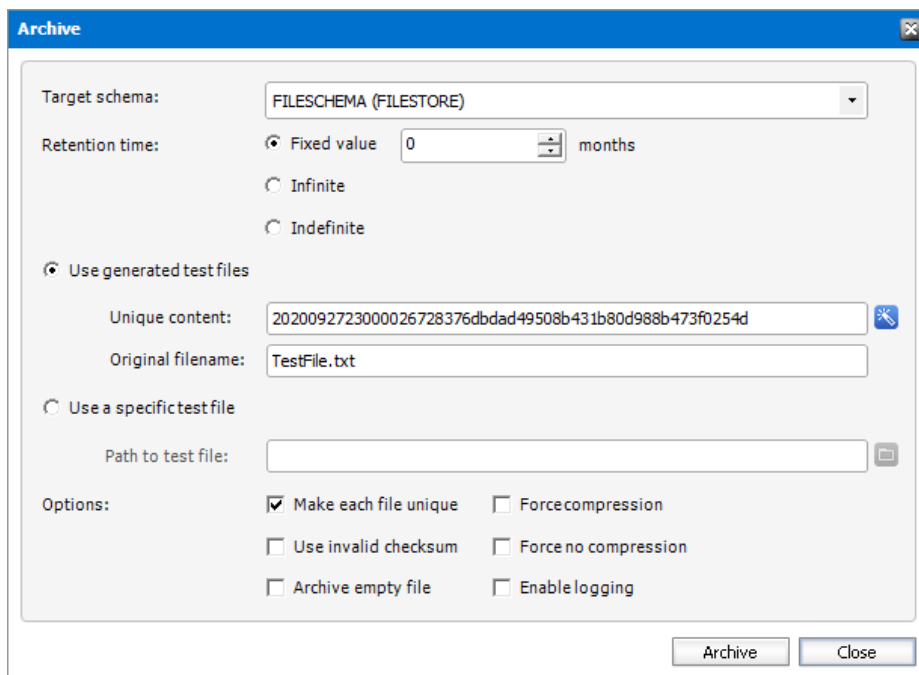
1. Open the *Configuration* wizard and select HSM from the feature panel.
2. Click the **Stores** tab. Then click **Test** from the **Schemas** section. The *HSM Test* window opens.



The **HSM Test** window is shown with the following fields and controls:

- HSM Server:** AMFHSM.democorp.com
- File identifier:** (empty text box)
- Identifier type:** ☒ HsmId ☐ Guid [Name to FileId...](#)
- Actions:** Archive... Retrieve Delete Set retention... Mass actions
- Close** button

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

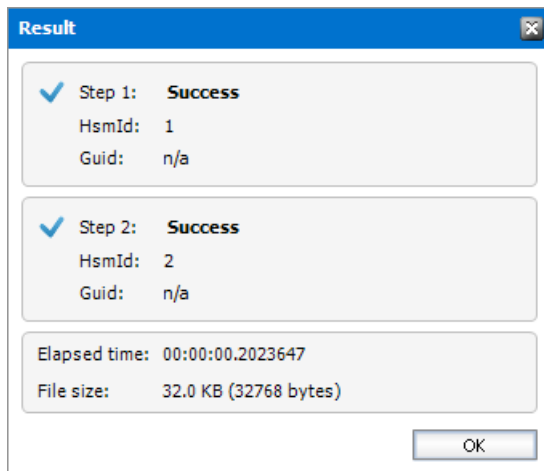


The **Archive** window is shown with the following fields and controls:

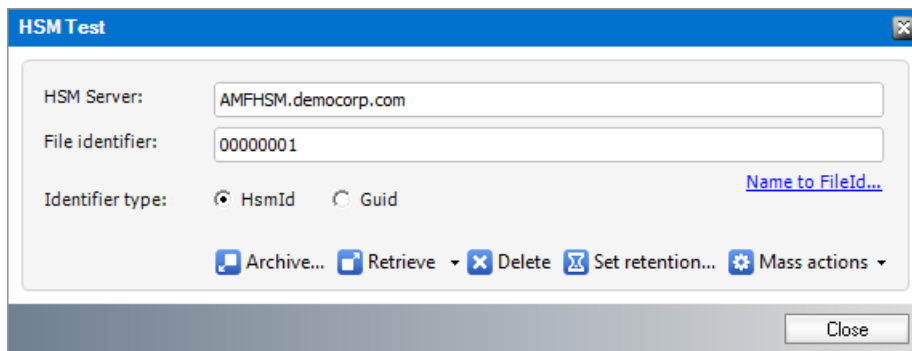
- Target schema:** FILESCHEMA (FILESTORE)
- Retention time:** ☒ Fixed value 0 months ☐ Infinite ☐ Indefinite
- ☒ Use generated test files
  - Unique content:** 2020092723000026728376dbdad49508b431b80d988b473f0254d
  - Original filename:** TestFile.txt
- ☐ Use a specific test file
  - Path to test file:** (empty text box)
- Options:**
  - ☒ Make each file unique ☐ Force compression
  - ☐ Use invalid checksum ☐ Force no compression
  - ☐ Archive empty file ☐ Enable logging
- Archive** and **Close** buttons

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

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

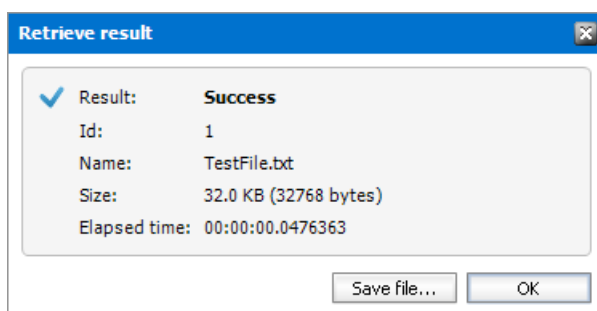


5. Verify that the result indicates success. Then click **OK** to close the *Result* window. Then close the *Archive* window.
6. In the *HSM Test* window, enter the name of the file that was archived in the Media Store during the archive test.



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](#) we will install the Archive Manager Search and Post Processing service on the same server where HSM was installed (eg. AMXHSM).

In this topic:

## For Archive manager Search

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

## For Post Processing

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

## 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.	AMXHSM
Superuser account	Windows account that is used to install the application and run the Archive Manager for Exchange services.	username: democorp\mamadmin password: *****
Media folder	Full path of the folder where the media files are extracted	C:\Metalogix

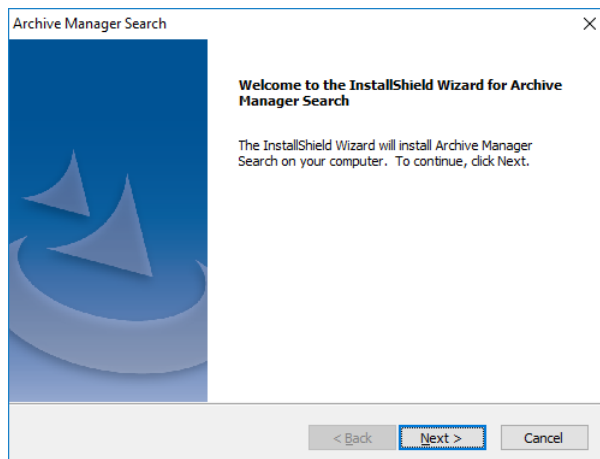


Installation folder	Full path of the folder where the application files will be installed	C:\Program Files (x86)\Metalogix
HSM Store folder	Full path of the folder that will contain the archived files.	C:\HSM  The local hard drive folder is used as the default media store. Use of other media storage 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.	FILESCHEMA
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.	AMXDB

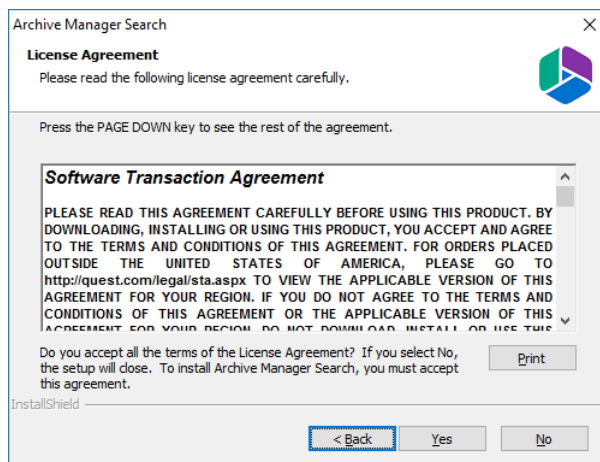
## Steps to install Archive Manager Search

1. Log in to the server where HSM was installed (eg. **AMXHSM**) with the credentials of the superuser (eg. **democorp\mamadmin**)
2. Download the installation media. For more information see [Steps to download the install media](#).
3. Run the **Metalogix Archive Manager Installation Package** to extract the files to a local folder.

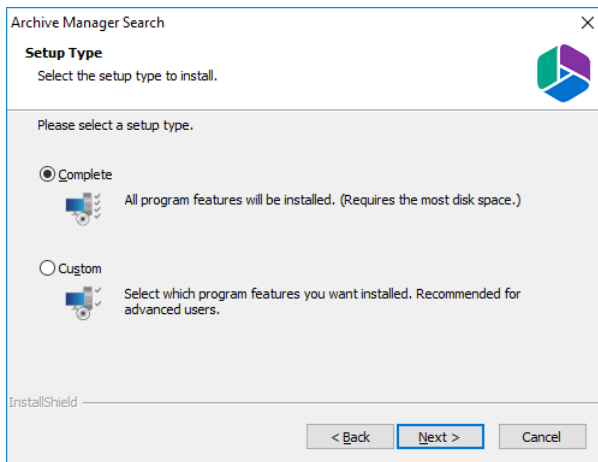
4. Close the integrated installer wizard which starts automatically.
5. Run the Archive Manager Search setup from <Media folder>\Archive Manager Installation Package\Archive Manager Search\Archive Manager Search Setup.exe
6. A prerequisite check occurs and missing requirements if any are displayed. Click **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.

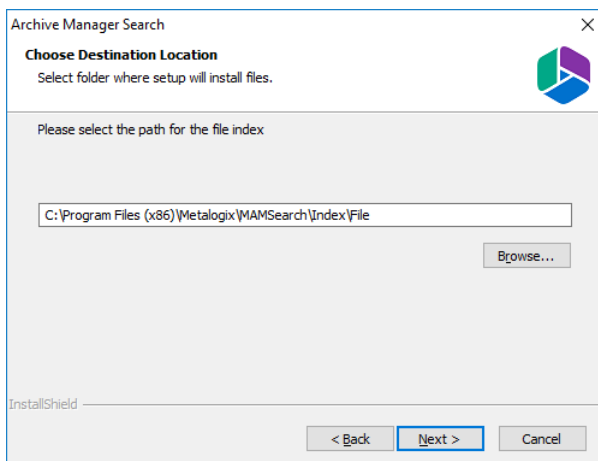


9. Click **Yes** to accept the license. The *Setup Type* window opens. Click **Print** if you wish to print the license agreement.

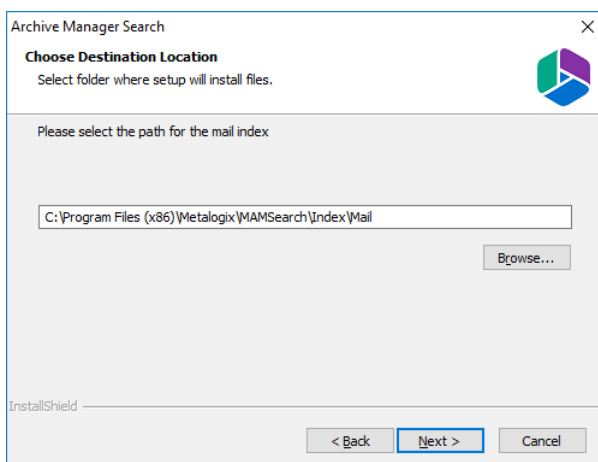


Select **Complete** to include *Post Processing* service. If you select **Custom**, you can modify the installation folder path which defaults to C:\Program Files (x86)\Metalogix\MAMSearch, and choose to whether you want to install Archive Manager Search or Post Processing or both.

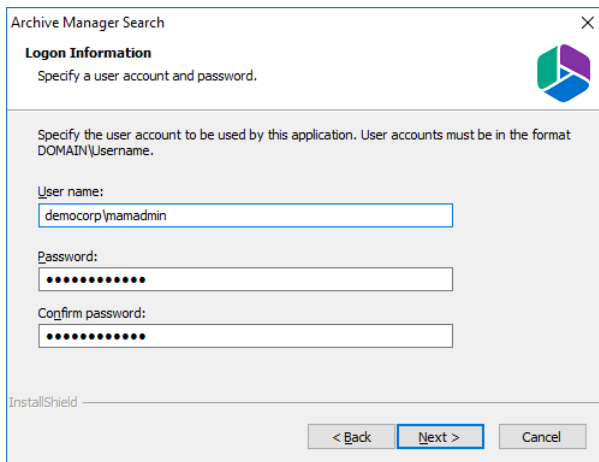
10. Click **Next**. The *Choose Destination Location* windows opens. This setting is for the *Metalogix Archive Manager for Files* product and is not used by Metalogix Archive Manager for Exchange.



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



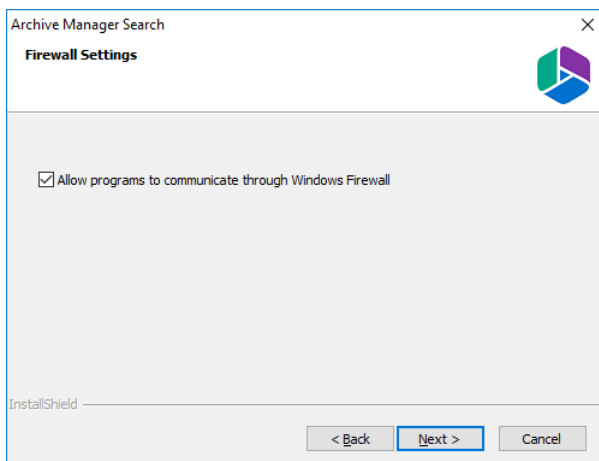
12. Accept the default setting and click **Next**. The *Logon Information* window opens.



Enter the information as described below:

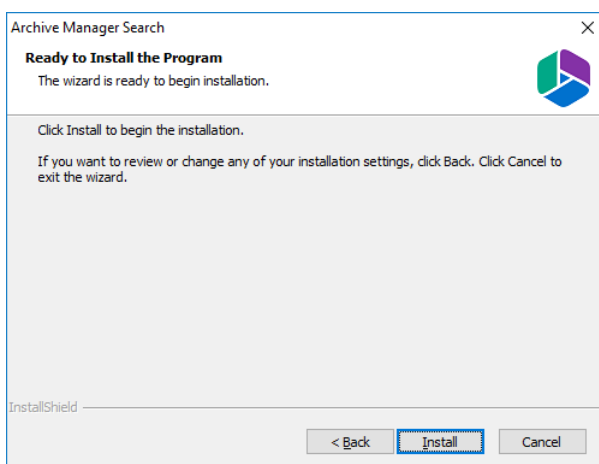
- a. **User name** - logon name of the superuser (for example, democorp\mamadmin)
- b. **Password** - logon password of the superuser
- c. **Confirm password** - same as the Password.

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

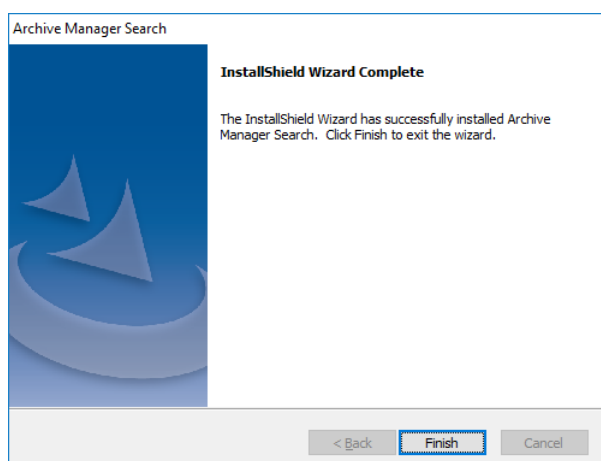


Select the check box **Allow programs to communicate through Windows Firewall**.

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

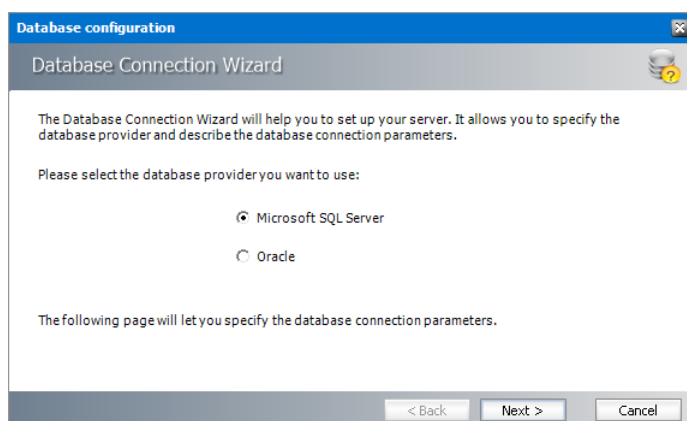


15. Click **Install**. The *InstallShield Wizard Complete* window opens.

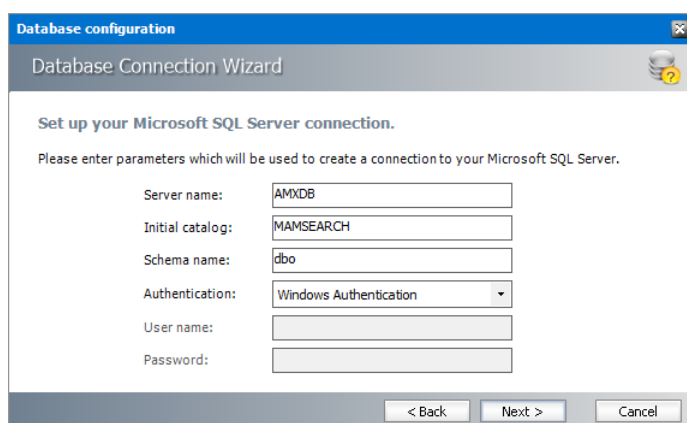


## Steps to configure the Search database connection

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.

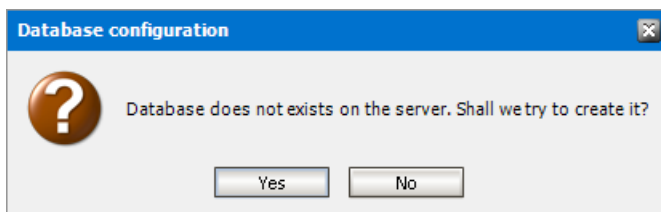


*For Microsoft SQL Server*

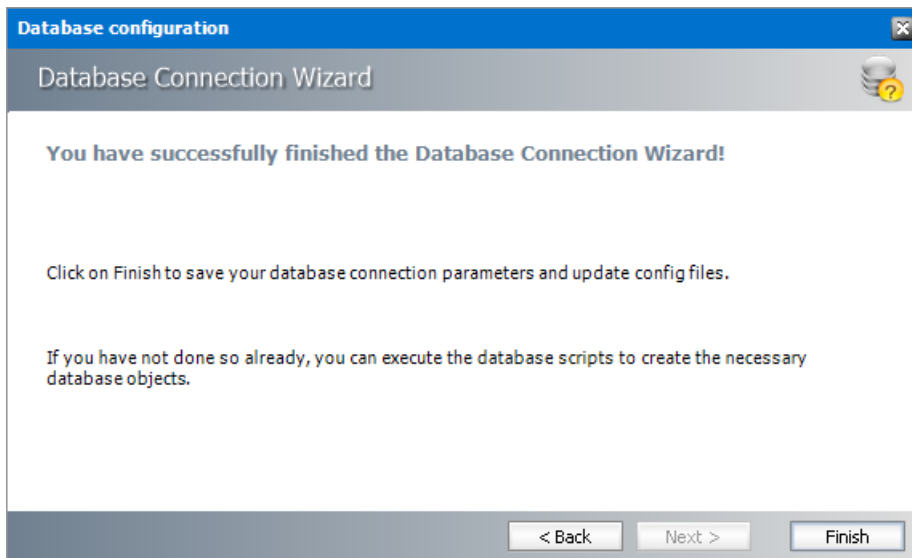
- a. **Server name** - name of the SQL server (eg. **AMXDB**)
- b. **Initial catalog** - name of the HSM database (e.g. **MAMSEARCH** which is the default name of the Archive Manager Search database)
- c. **Schema name** - name of the SQL Schema (e.g. **dbo**)
- d. **Authentication** – authentication 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. **AMXDB**)
  - 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.



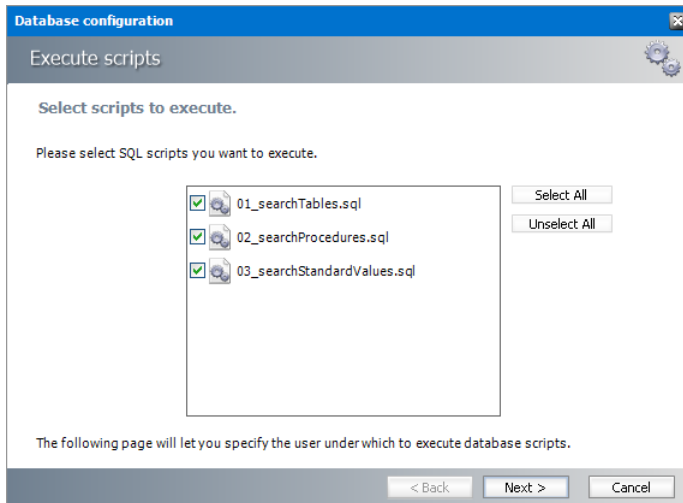
6. If the database connection is setup successfully, the configuration confirmation window opens.



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
    )

```

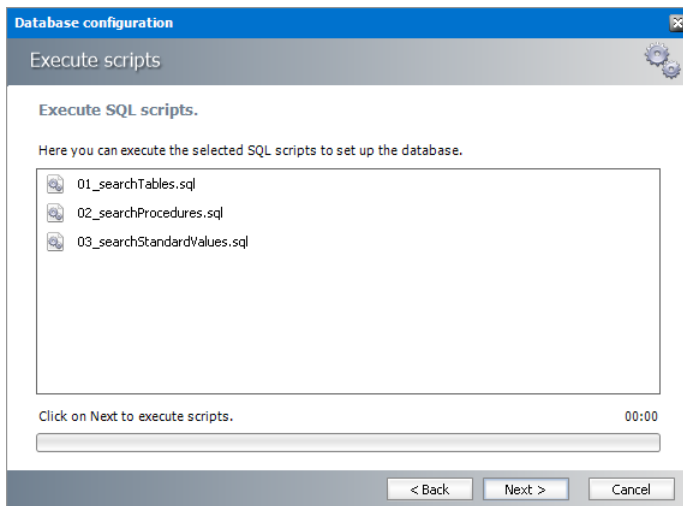
Save Script...   Word wrap ☒

< Back   Next >   Cancel

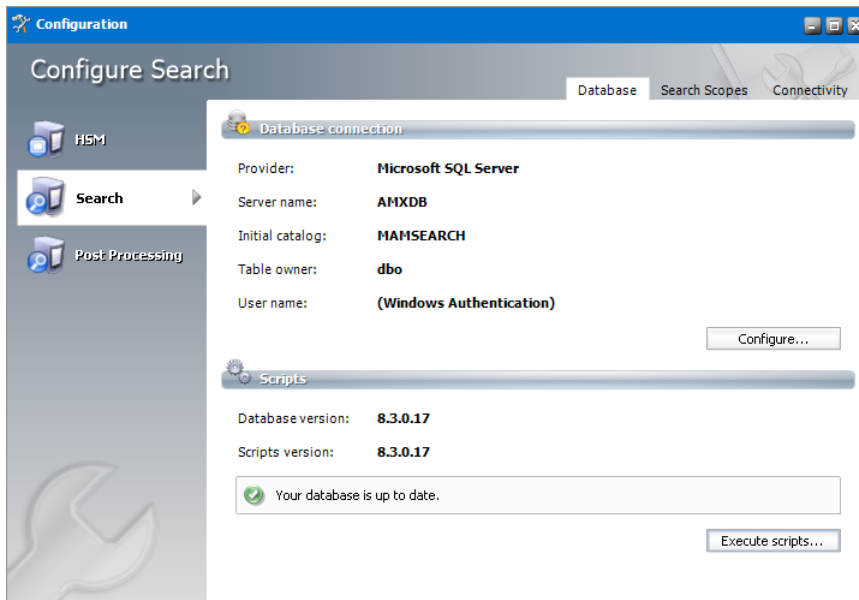
Click **Save Script** to save the script as a script file to a folder. Check the **Word wrap** check box to display long lines as multiple lines of text.

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



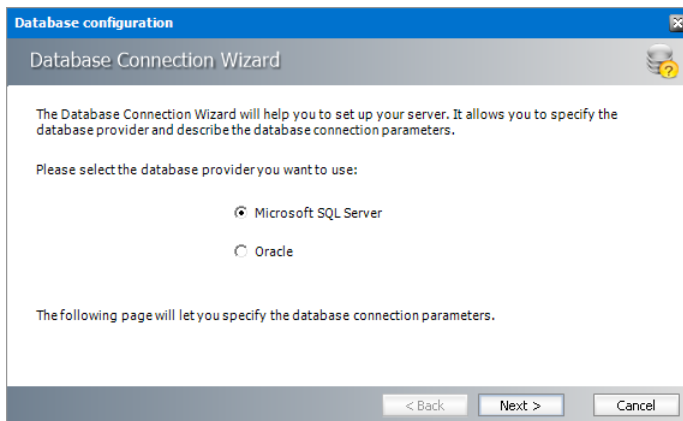


7. Click **Next**. When the status changes to *Scripts were run successfully*, click **Finish** to close the script installer. The *Scripts* section of the *Configuration* wizard displays the status and version of the scripts.

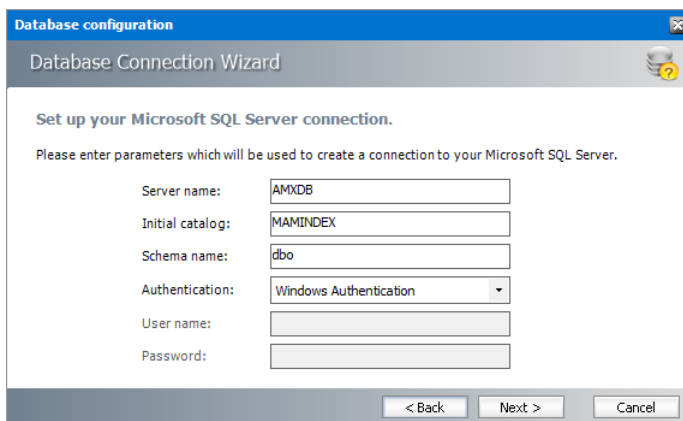


## Steps to configure the Post Processing database connection

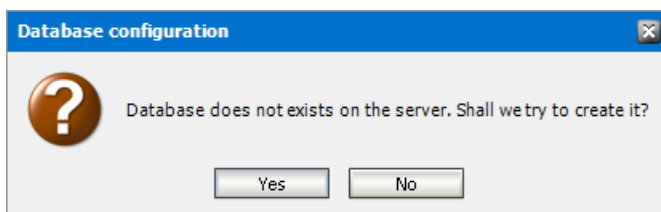
1. When the installation completes, the *Configuration* wizard opens. If it does not open automatically, click **Start > Metalogix > Archive Manager Configuration**.
2. From the feature panel on the left, click **Post Processing** and select the **Database** tab.
3. Click **Configure**. The *Database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



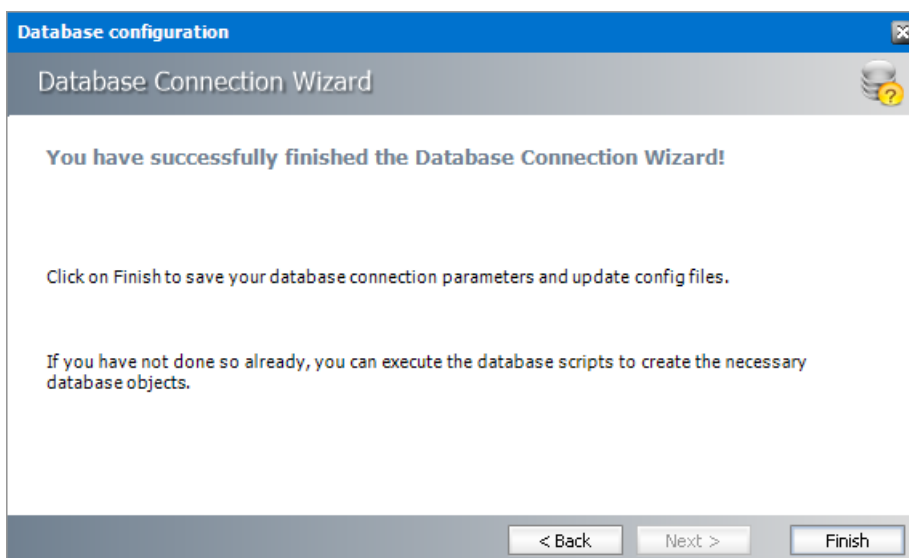
4. Click **Next**. The *SQL Server connection* window opens.



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



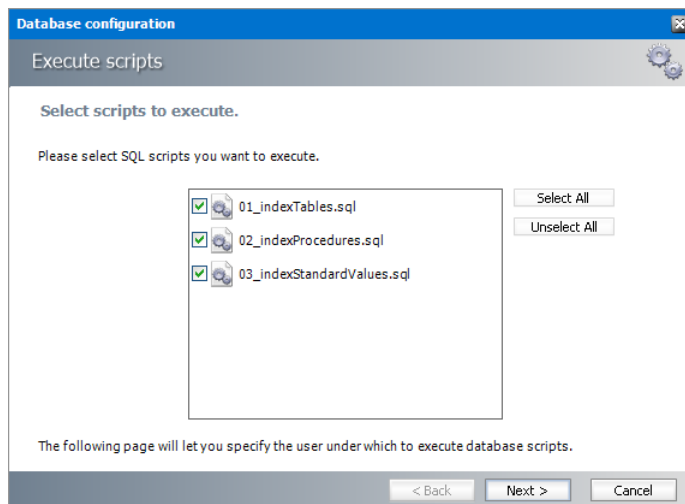
6. If the database connection is setup successfully, the confirmation window opens.



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

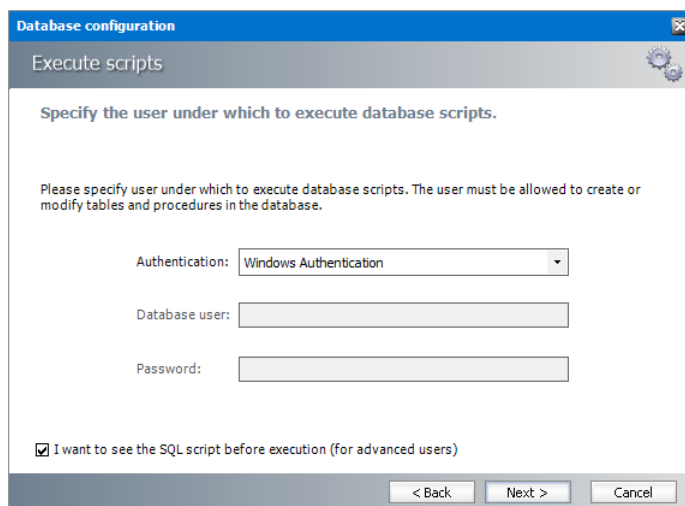
## Steps to install the Post Processing database

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 **Run Scripts**. The *Run Scripts* selection window opens.



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

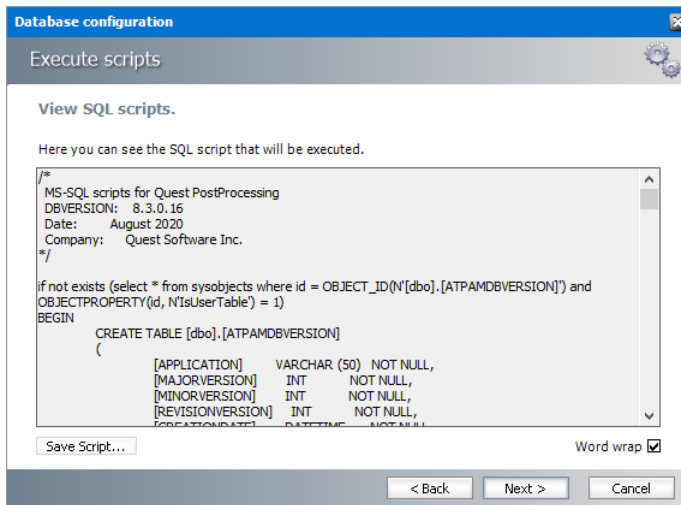
3. Click **Next**. The *run Scripts* authentication window opens.



Enter the information as described below:

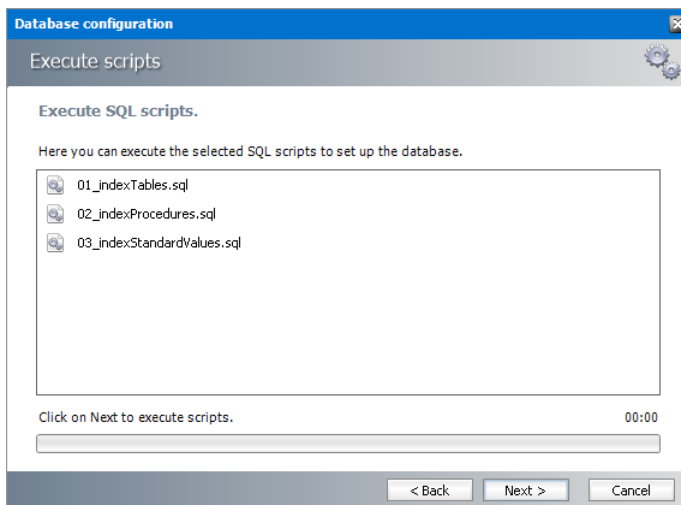
- a. **Authentication** - authentication type used for the database. Choose either **Windows authentication** or **SQL Server authentication**
- b. **User name** - database login user name if *SQL Server authentication* is the selected as the authentication mode.
- c. **Password** - password of the database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

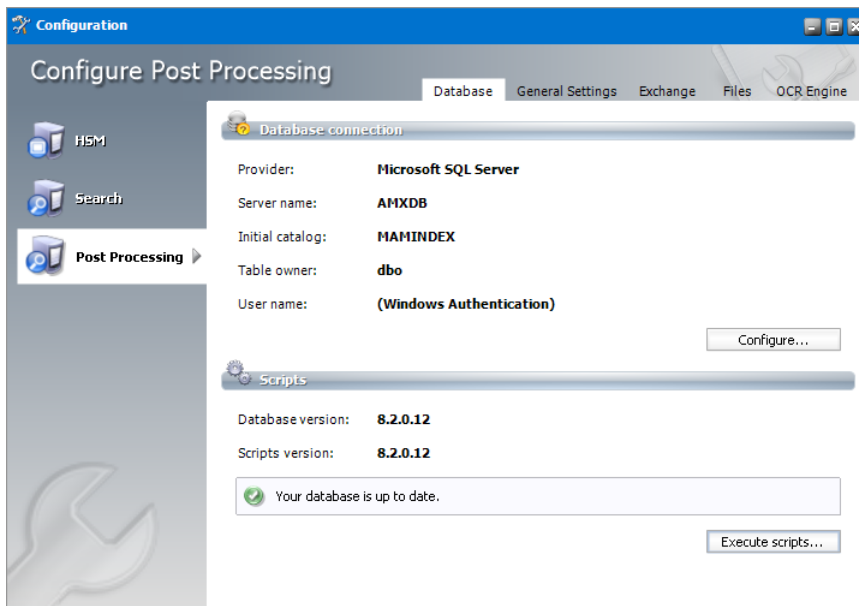


Click **Save Script** to save the script as a script file to a folder. Check the **Word wrap** check box to display long lines as multiple lines of text.

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



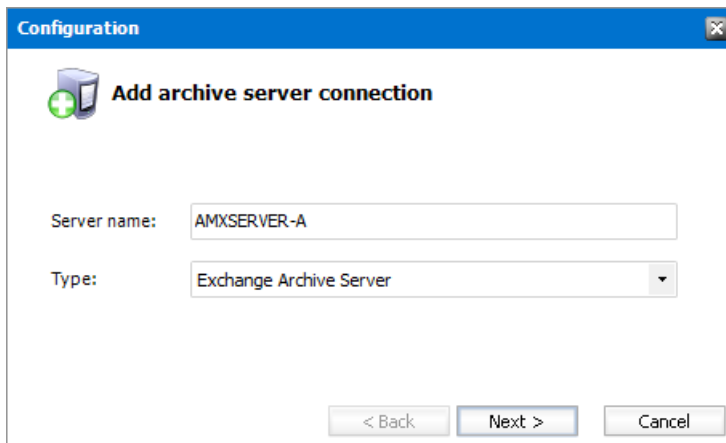
6. Click **Next**. When the status changes to *Scripts were run successfully*, click **Finish** to close the script installer. The *Scripts* section of the *Configuration* wizard displays the status and version of the scripts (the version of the scripts you install may differ from the version shown in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



**i** **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 the Archive server](#) for next steps.

## Steps to configure Search Scopes

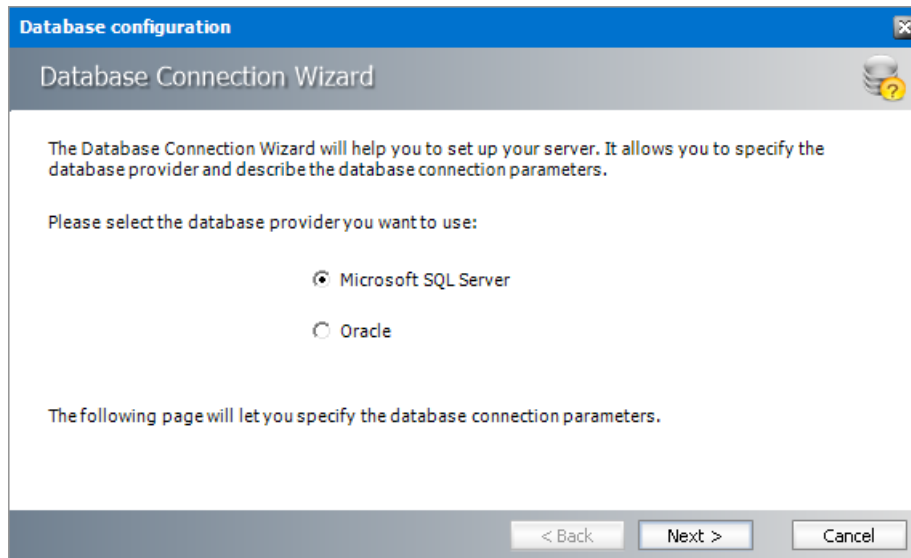
1. From the feature panel on the left in the *Configuration* wizard, click **Search** and select the **Search Scopes** tab.



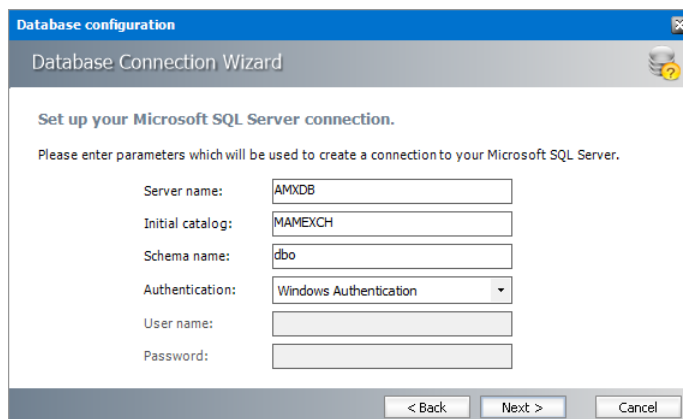
Enter the information and described below:

- a. **Server name** - name of the primary Archive Manager for Exchange server (eg. AMXSERVER-A) where the role will be set to **Archive** server.
  - b. **Type** - Select Exchange 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.

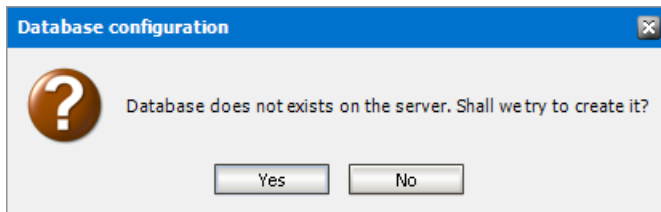


*For Microsoft SQL Server*

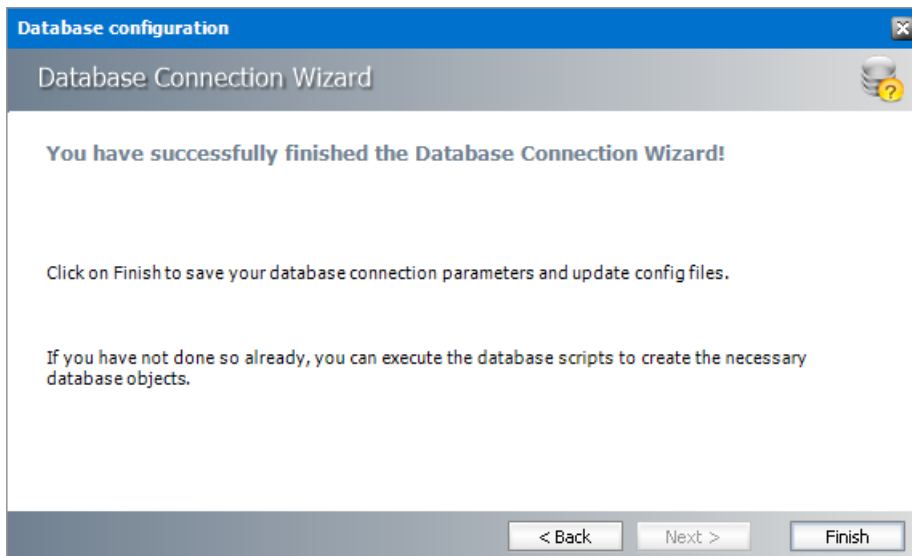
- a. **Server name** - name of the SQL server (eg. **AMXDB**)
- b. **Initial catalog** - name of the Archive Manager for Files database (e.g. **MAMEXCH** which is the default name of the Archive Manager for Files database)
- c. **Schema name** - name of the SQL Schema (e.g. **dbo**)
- d. **Authentication** – 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*

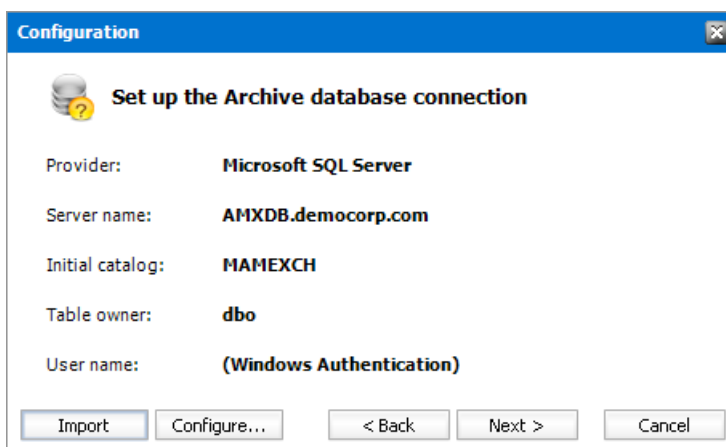
- a. **Oracle net name** - net service name that describes the network address of the HSM database in your `tnsnames.ora` file (eg. **AMFDB**)
  - b. **Schema** - name of the Archive Manager for Files database (e.g. **MAMEXCH** which is the default name of the Archive Manager for Files database)
  - 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.



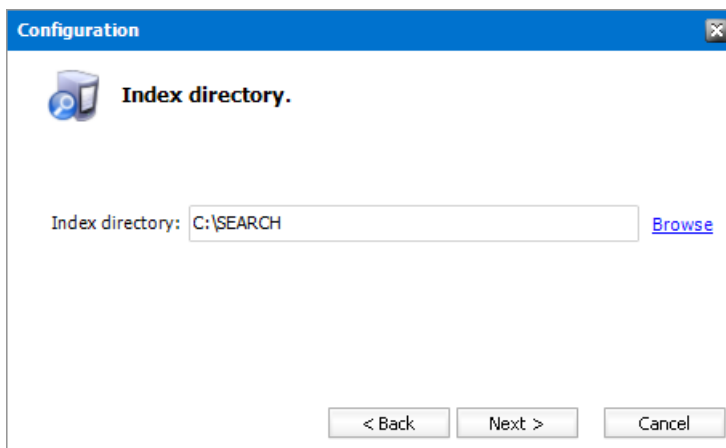
6. If the database connection is setup successfully, the configuration confirmation window opens.



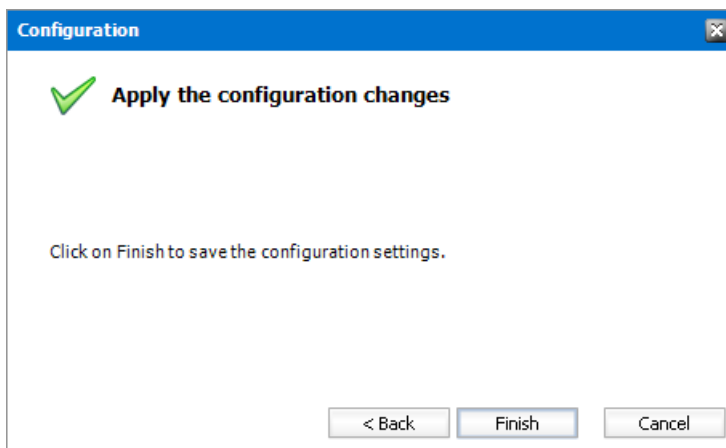
7. Click **Finish** to close the *Database Connection* wizard. The *Set up the Archive database connection* window opens.



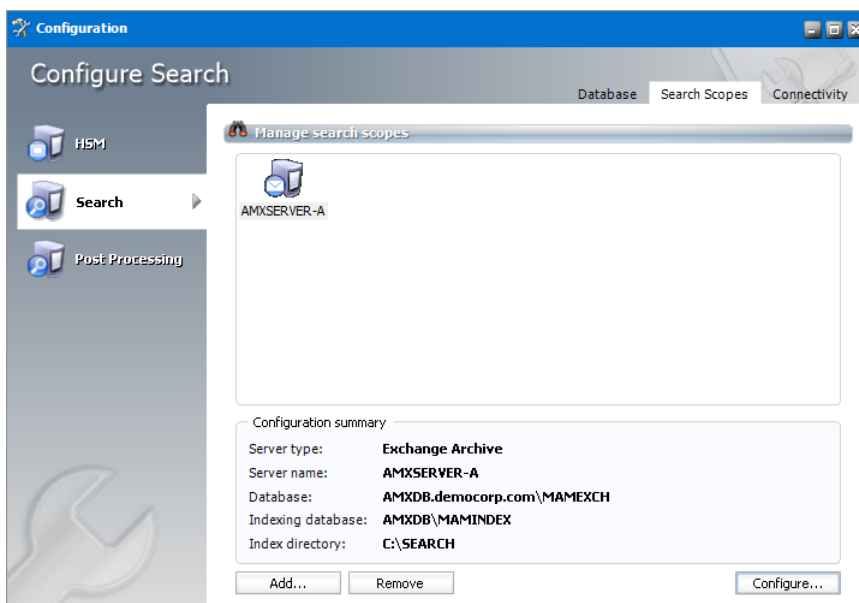
8. Click **Next**. The *Configuration* window for the *Index directory* opens.



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



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



11. Close the *Configuration* wizard.



# Install the Archive server

In this topic:

- [Worksheet for this installation](#)
- [Steps to install Archive Manager for Exchange](#)
- [Steps to configure the Archive Manager database](#)
- [Steps to install the Archive Manager database](#)
- [Steps to configure the Auditing database](#)
- [Steps to install the Auditing database](#)
- [Steps to configure the User database](#)
- [Steps to install the User database](#)
- [Steps to start the Archive Manager services](#)
- [Steps to configure and verify the Archive server](#)

## Worksheet for this installation

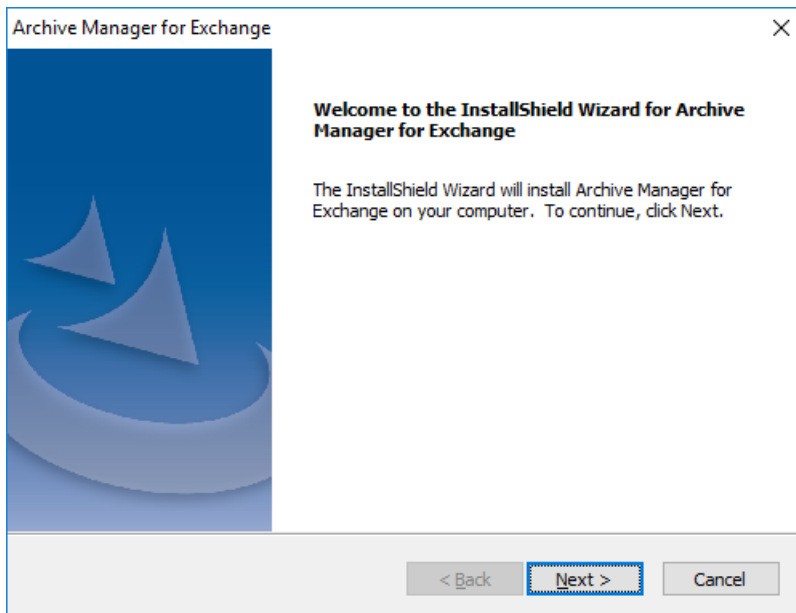
The following information will be required through the installation process. Sample values are provided here as a guidance.

Item	Description	Example
License Key	The license key that you received from Quest. If you don't have a license key, contact your Quest representative.	894K5-3M448-M544E-A594A-7K8Z7 (Sample only. This key is neither an active nor an expired license key)
Archive manager for Exchange server	The server where the Archive Manager for Exchange will be installed.	AMXSERVER-A
Superuser account	Windows account that is used to install the application and run the Archive Manager for Exchange services.	username: democorp\mamadmin password: *****

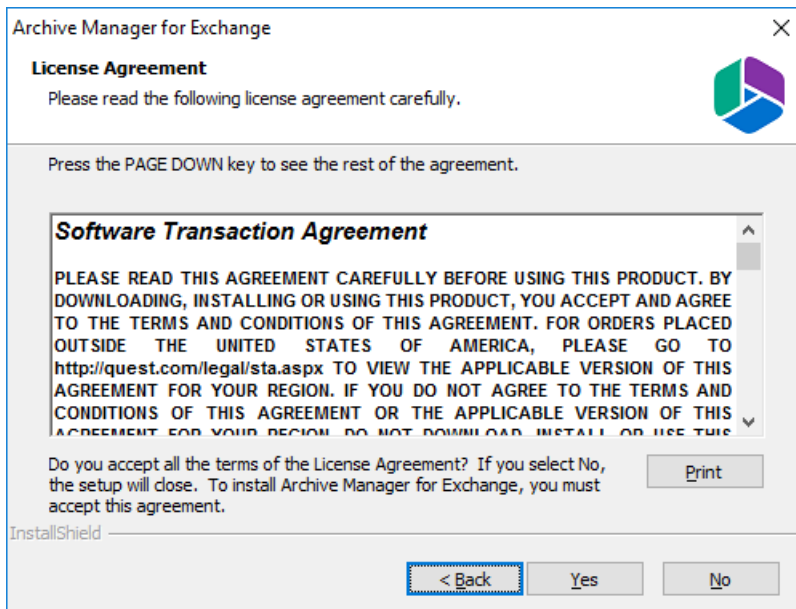
Media folder	Full path of the folder where the media files are extracted	C:\Metalogix
Installation folder	Full path of the folder where the application files will be installed	C:\Program Files (x86)\Metalogix
Database Authentication method	Type of database authentication: <i>Integrated Windows Authentication</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.	AMXDB
HSM server	The server where HSM is installed.	AMXHSM
Search server	The server where the Archive Manager Search is installed.	AMXHSM

## Steps to install Metalogix Archive Manager for Exchange

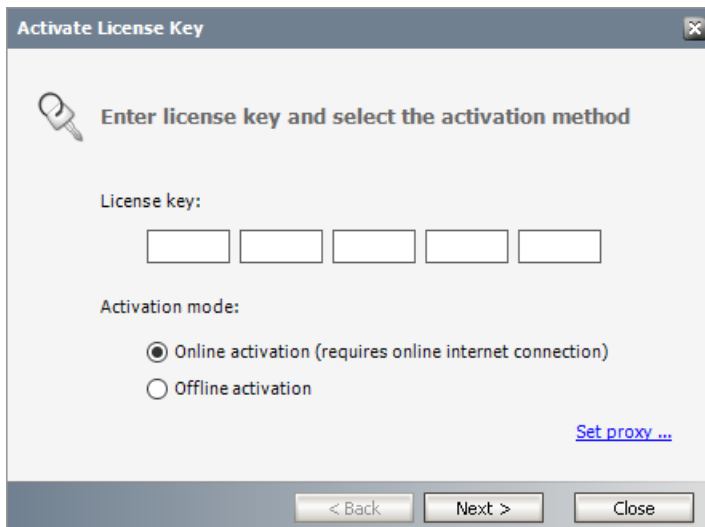
1. Login to the server with the credentials of the superuser (eg. **democorp\mamadmin**)
2. Run the **Metalogix Archive Manager Installation Package** to extract the files to a local folder.
3. Close the integrated installer wizard which starts automatically.
4. Run the Archive Manager Search setup from <Media folder>\C:\Metalogix\Archive Manager Installation Package\Exchange\Archive Manager for Exchange Setup.exe.
5. A prerequisite check occurs and missing requirements if any are displayed. Click **Install** to ensure all missing requirements are installed.
6. The *Welcome* window of the Archive Manager for Exchange installer opens.



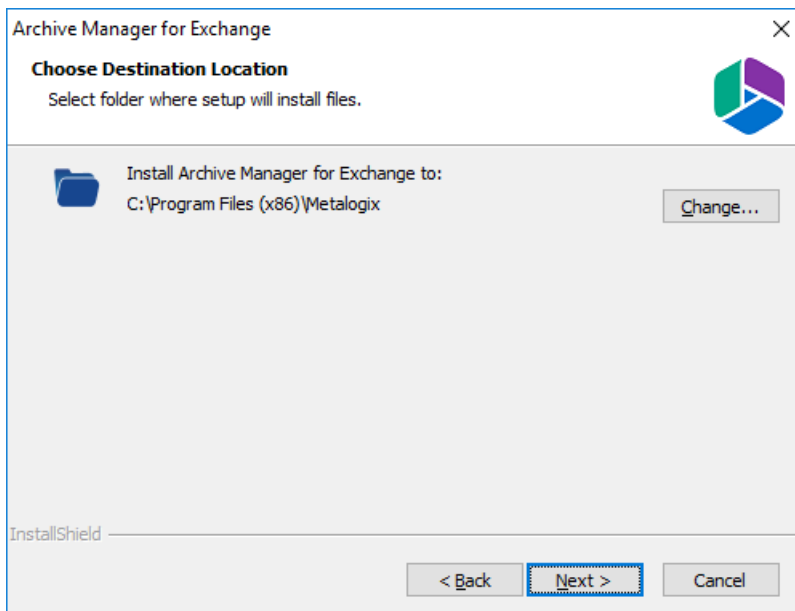
7. Click **Next**. The *License Agreement* window opens.



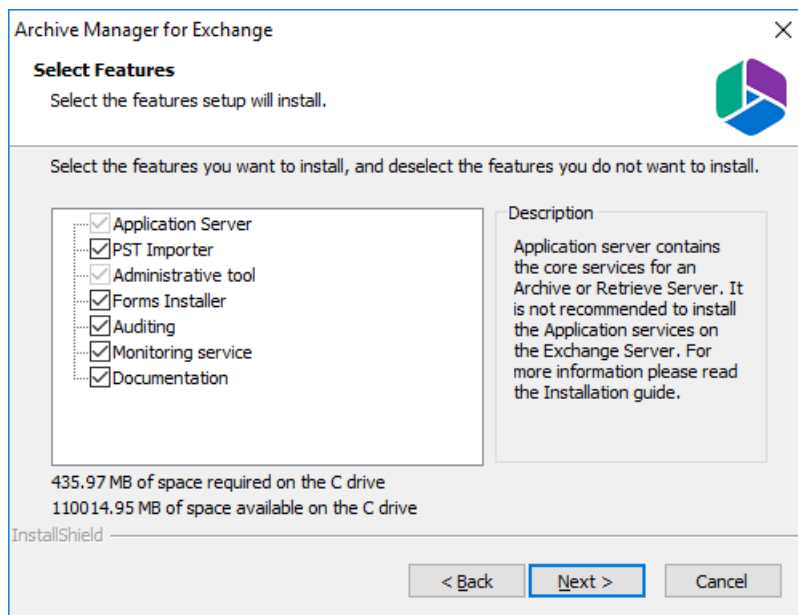
8. Click **Yes** to accept the license. The *License Key* window opens. Click **Print** if you wish to print the license agreement.



9. If you are connected to the internet, select **Online activation** or see [License Activation](#) for more options. Click **Next**. When your license is activated, you will see a confirmation message and the license details. Click **Finish** to close the **Activate License Key** dialog.



10. Click **Change** to choose another installation folder or keep the default and click Next. The *Select Features* window opens.



### Mandatory features

- Application Server
- Administrative tool

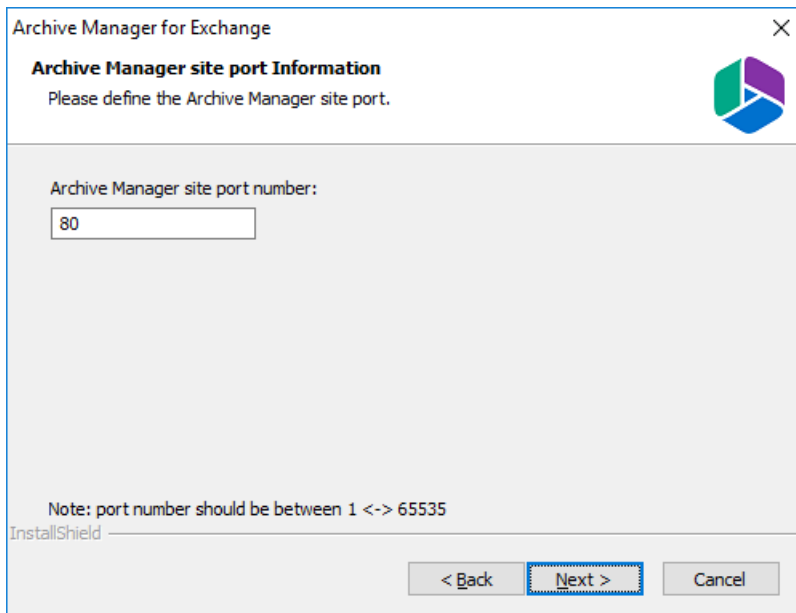
### Optional features

- Auditing
- Monitoring service

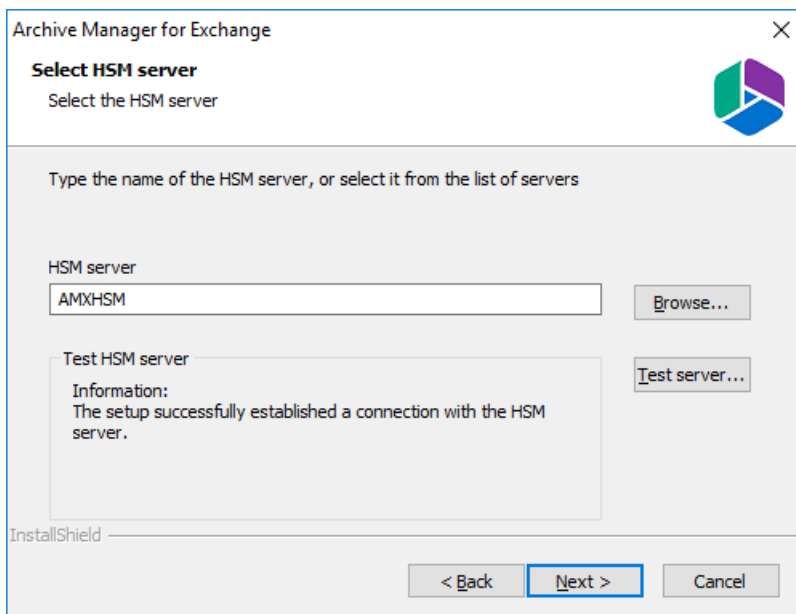
### Optional resources

- PST Importer. For more information see the *Metalogix® Archive Manager for Exchange PST Importer Guide*.
- Forms Installer
- Documentation

11. Click **Next**. The *Archive Manager site port Information* window opens.



12. Keep the default port 80 unless there are other application co-located on this server that also use port 80. Click **Next** and the *Select HSM server* window opens.



In the **HSM server** field, enter the name, FQDN or IP address of the server where the HSM application feature was installed. You can click **Browse** to locate the server in the domain.

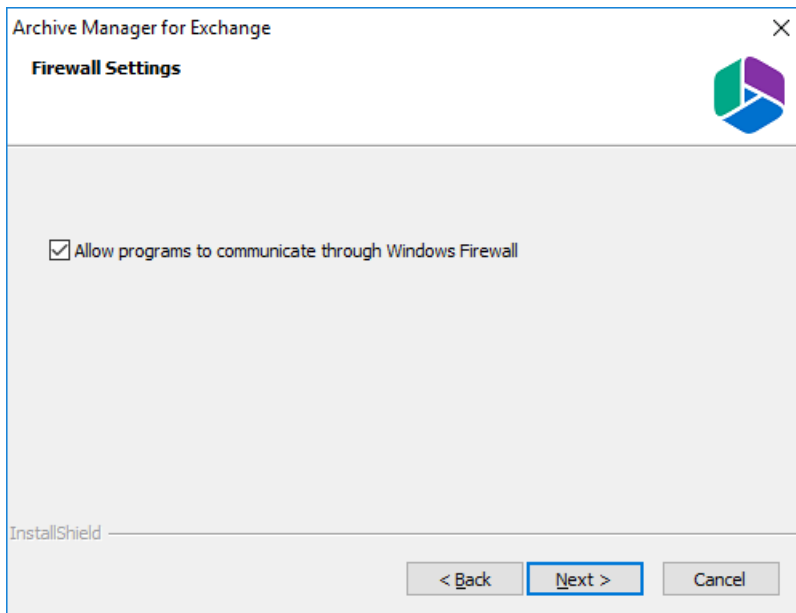
13. Click **Test server** to verify the connection and then click **Next**. The *Search server* window opens.

Check the **Enable Archive Manager Search** to enable search functionality from this server. In the **Search server** field, enter the name, FQDN or IP address of the server where the HSM application feature was installed. You can click **Browse** to locate the server in the domain.

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

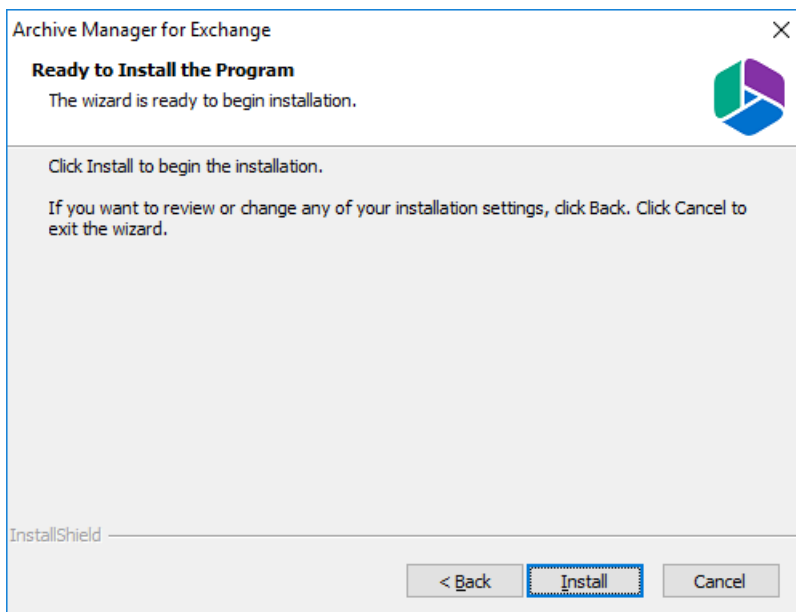
In the **User name** field, specify the superuser name (eg. **democorp\mamadmin**) and **Password**. Enter the password again in the **Confirm password** field.

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



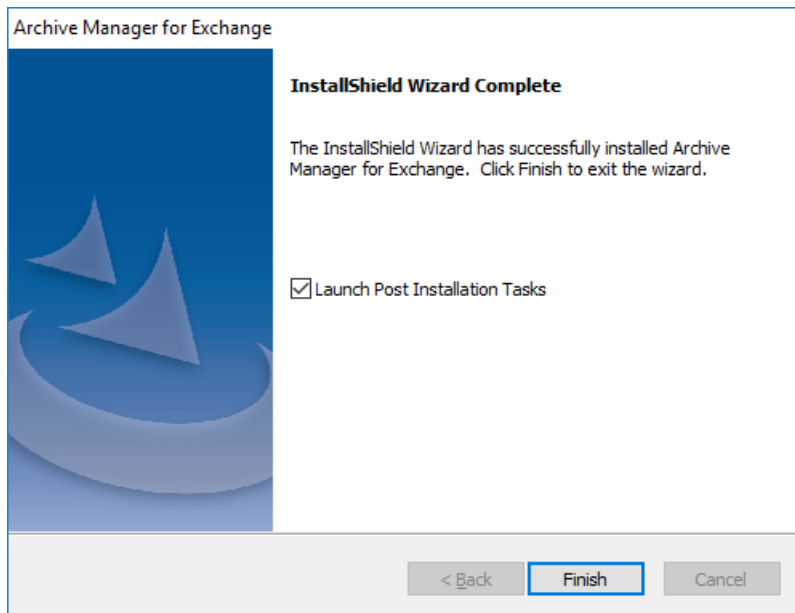
Select the **Allow programs to communicate through Windows Firewall** check box. Metalogix Archive Manager for Exchange features will be then able to communicate through the firewall.

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

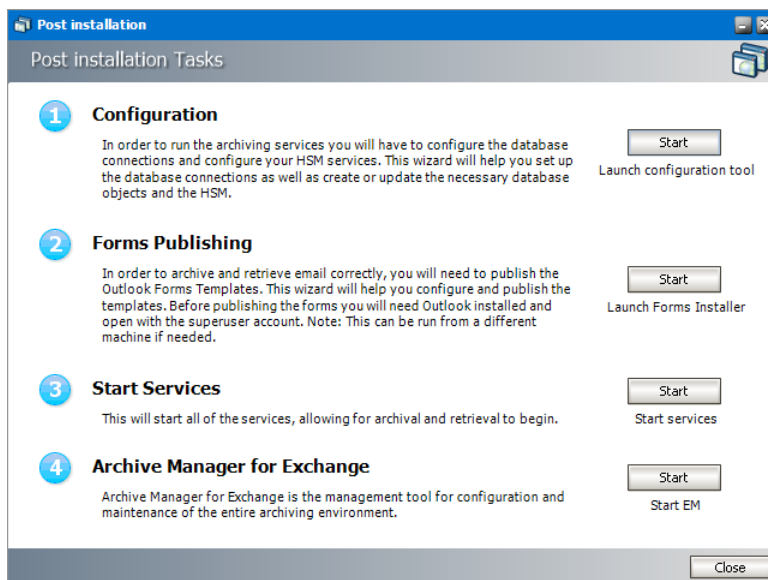


17. Click **Install** to start the installation. When the installation completes, the *InstallShield Wizard Complete* window opens.



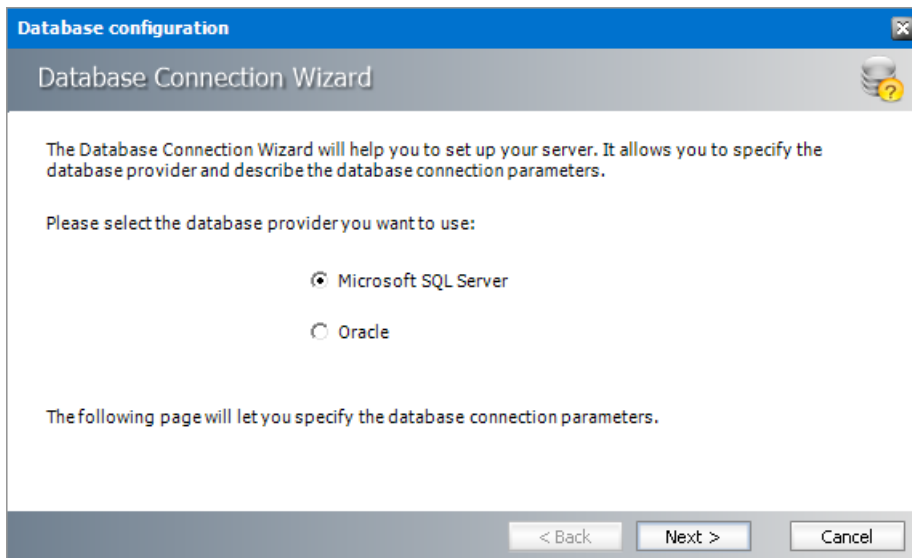


18. Select the *Launch Post Installation Tasks* check box and click **Finish**. The *Post installation Tasks* wizard opens.

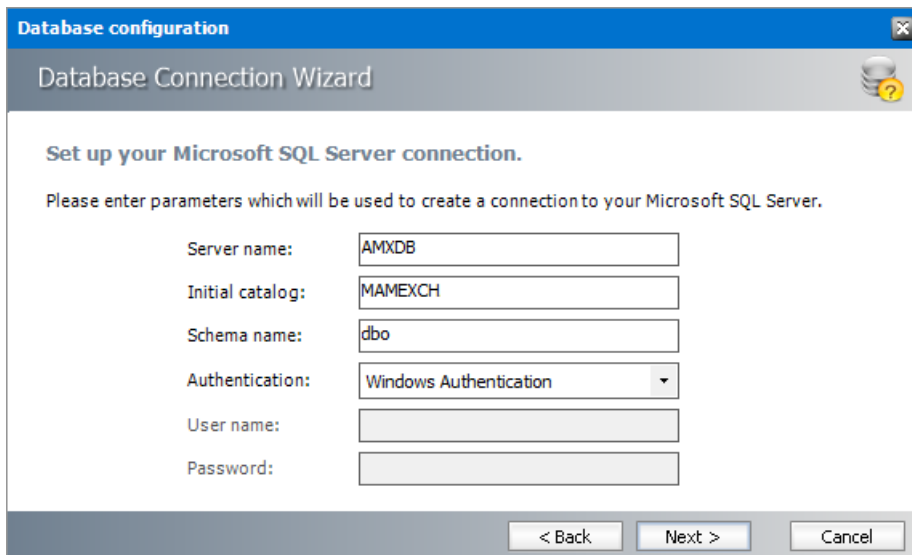


## Steps to configure the Archive Manager database

1. When the installation completes, the *Post installation Tasks* wizard opens. You can open the *Post installation Tasks* wizard from `C:\Program Files (x86)\Metalogix\MAM4Exchange\Tools\LaunchTools\LaunchTools.exe`.
2. Click **Start** next to the Configuration step to open the *Configuration* wizard. To directly open the *Configuration* wizard click **Start > Metalogix > Archive Manager Configuration**.
3. From the feature panel on the left, click **Archive Manager** and select the **Database** tab.
4. Click **Configure**. The *Database Connection Wizard* opens.



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

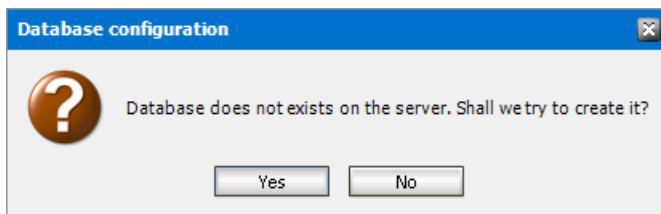


*For Microsoft SQL Server*

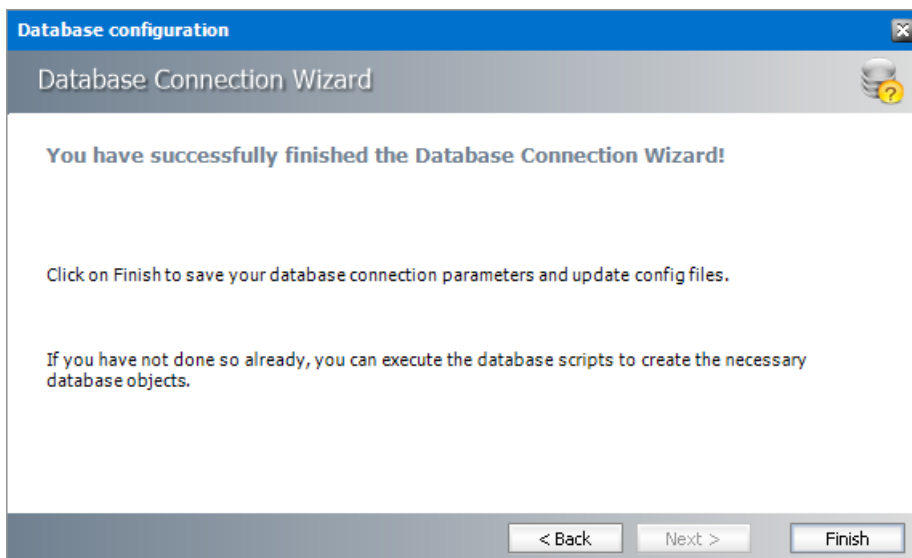
- a. **Server name** - name of the SQL server (eg. **AMXDB**)
- b. **Initial catalog** - name of the HSM database (e.g. **MAMEXCH** which is the default name of the Archive Manager for Exchange database)
- c. **Schema name** - name of the SQL Schema (e.g. **dbo**)
- d. **Authentication** – authentication 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.
- £. **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. **AMXDB**)
  - b. **Schema** - name of the HSM database (e.g. **MAMEXCH** which is the default name of the Archive Manager for Exchange database)
  - c. **User name** - database login user name
  - d. **Password** - password of the database user
6. Click **Next** and then click **Yes** on the confirmation dialog that opens.



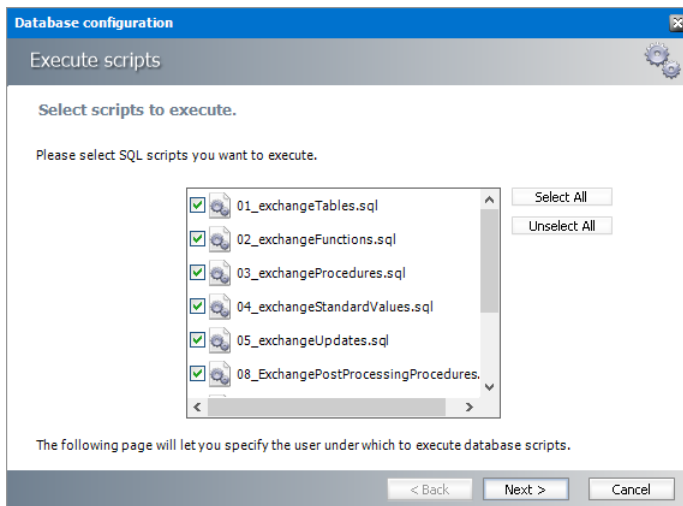
7. If the database connection is setup successfully, the confirmation window opens.



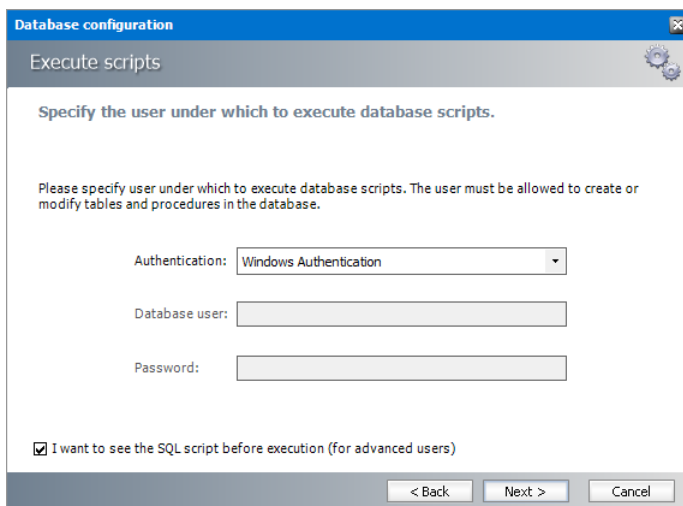
8. Click **Finish** to close the *Database Connection* wizard.

## Steps to install the Archive Manager 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.

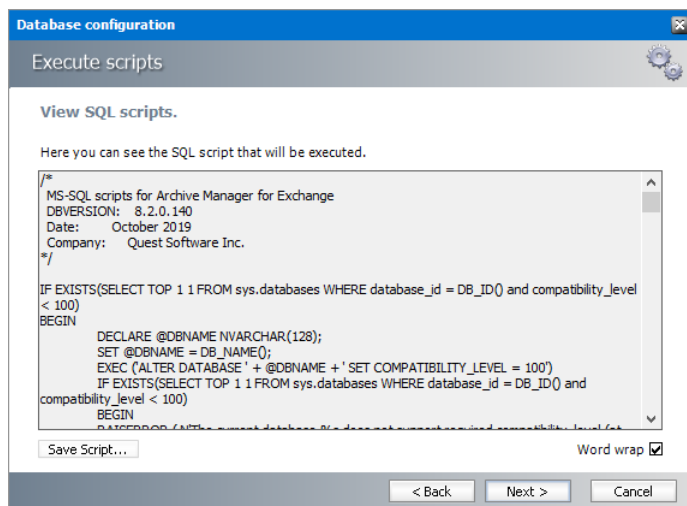


3. Click **Select All** to select all check boxes. Click **Next**. The *View SQL scripts* window opens.
4. Click **Next**. The *Run Scripts* authentication window opens.



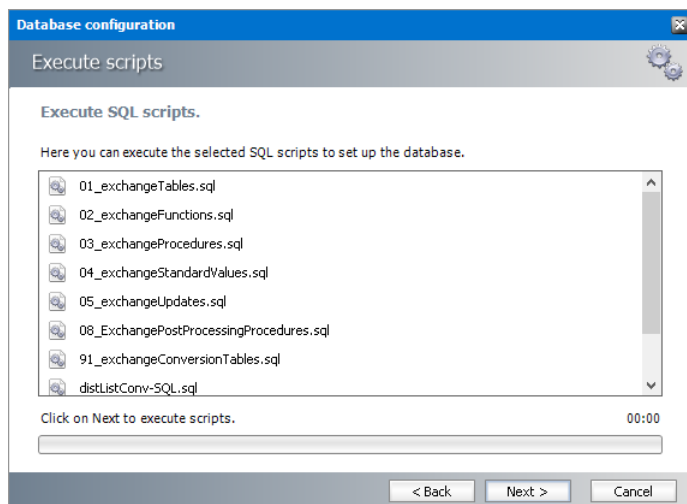
Enter the information as described below:

- 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

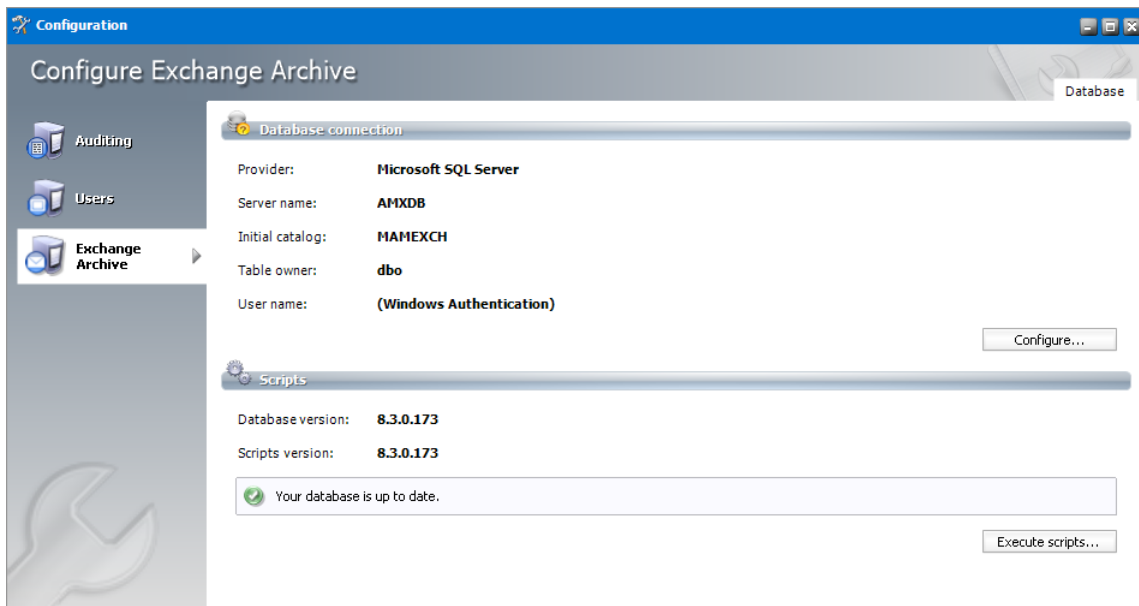


Click **Save Script** to save the script as a script file to a folder. Check the **Word wrap** check box to display long lines as multiple lines of text.

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



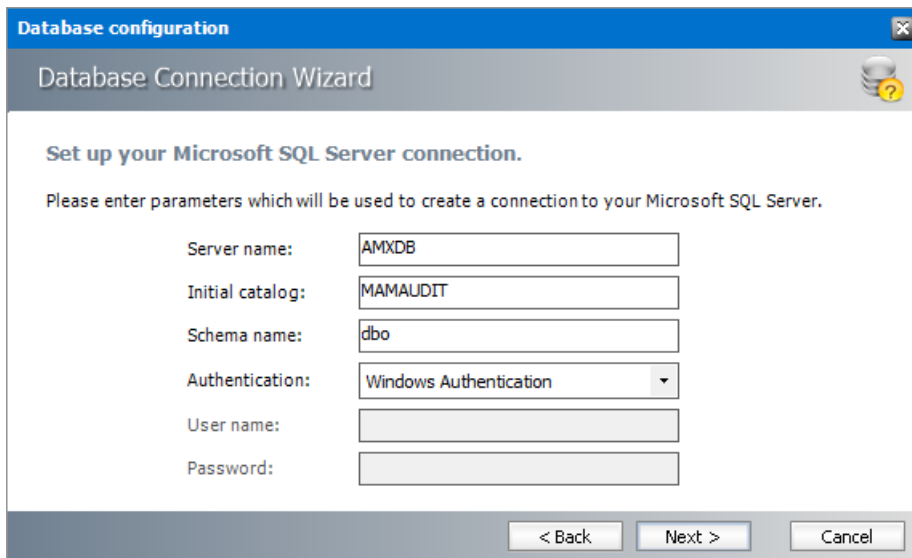
7. Click **Next**. When the status changes to *Scripts were run successfully*, click **Finish** to close the script installer. The *Scripts* section of the *Configuration* wizard displays the status and version of the scripts (the version of the scripts you install may differ from the version shown in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



8. Close the *Configuration* wizard.

## Steps to configure the Auditing database

1. Open the *Configuration* wizard if it is not already open.
2. From the feature panel on the left, click **Auditing** and then 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 SQL Server

- a. **Server name** - name of the SQL server (eg. **AMXDB**)
- b. **Initial catalog** - name of the HSM database (e.g. **MAMAUDIT** which is the default name of the Archive Manager for Exchange 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.

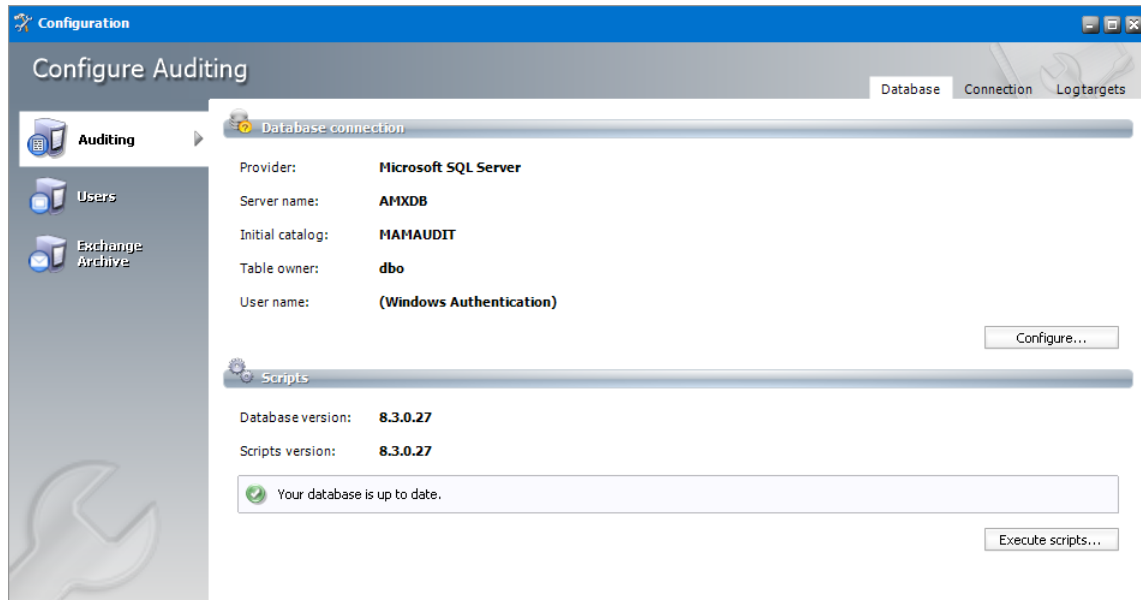
#### For Oracle

- e. **Oracle net name** - net service name that describes the network address of the database server in your `tnsnames.ora` file (eg. **AMXDB**)
  - f. **Schema** - name of the Auditing schema (e.g. **MAMAUDIT** which is the default name of the Archive Manager for Exchange database)
  - g. **User name** - database login user name
  - h. **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 Auditing database

1. From the feature panel on the left in the *Configuration* wizard, click **Auditing** 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.
5. 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.
6. (optional) Check the **I want to review the SQL Scripts** check box to view the scripts.
7. 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

8. 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.
9. Click **Next**. The *Run SQL scripts* window reopens with the scripts you have chosen to run.
10. 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.



11. Close the *Configuration* wizard.

## Steps to configure the User database

1. Open the *Configuration* wizard if it is not already open.
2. From the feature panel on the left, click **Users** and then 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.



**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:

Initial catalog:

Schema name:

Authentication:

User name:

Password:

< Back    Next >    Cancel

### For SQL Server

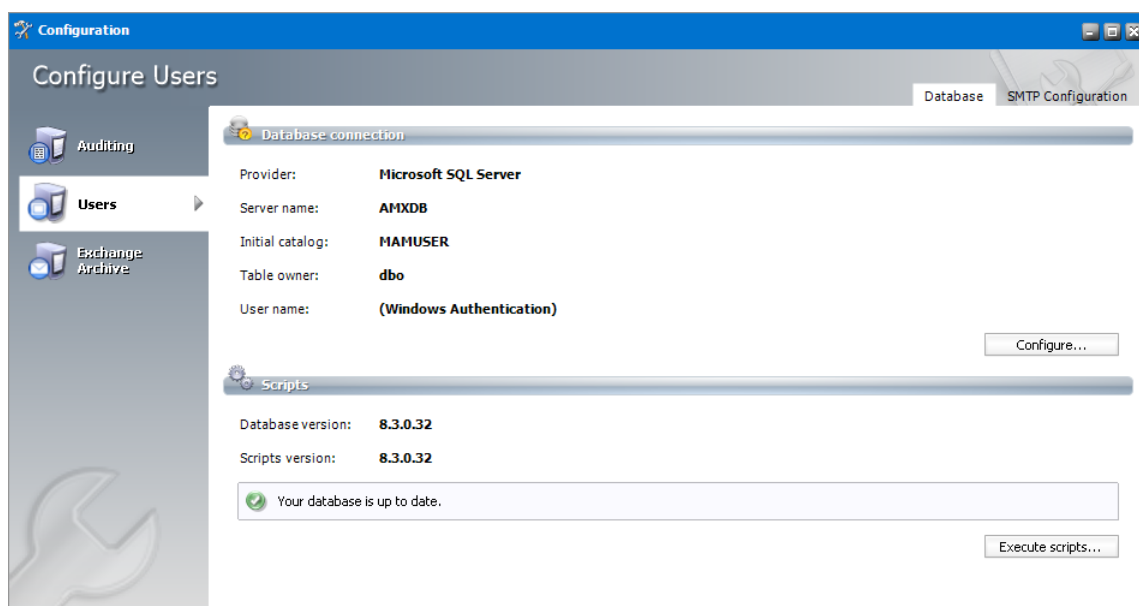
- a. **Server name** - name of the SQL server (eg. **AMXDB**)
- b. **Initial catalog** - name of the HSM database (e.g. **MAMUSER** which is the default name of the Archive Manager for Exchange database)
- c. **Schema name** - name of the SQL schema (e.g. **dbo**)
- d. **Authentication** – authentication 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 (eg. **AMXDB**)
  - b. **Schema** - name of the Auditing schema (e.g. **MAMUSER** which is the default name of the Archive Manager for Exchange 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 User database

1. From the feature panel on the left in the *Configuration* wizard, click **Auditing** 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.
5. 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.
6. 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
7. 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.
8. Click **Next**. The *Run SQL scripts* window reopens with the scripts you have chosen to run.
9. 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.



10. Close the *Configuration* wizard.

## Steps to start the Archive Manager for Exchange services

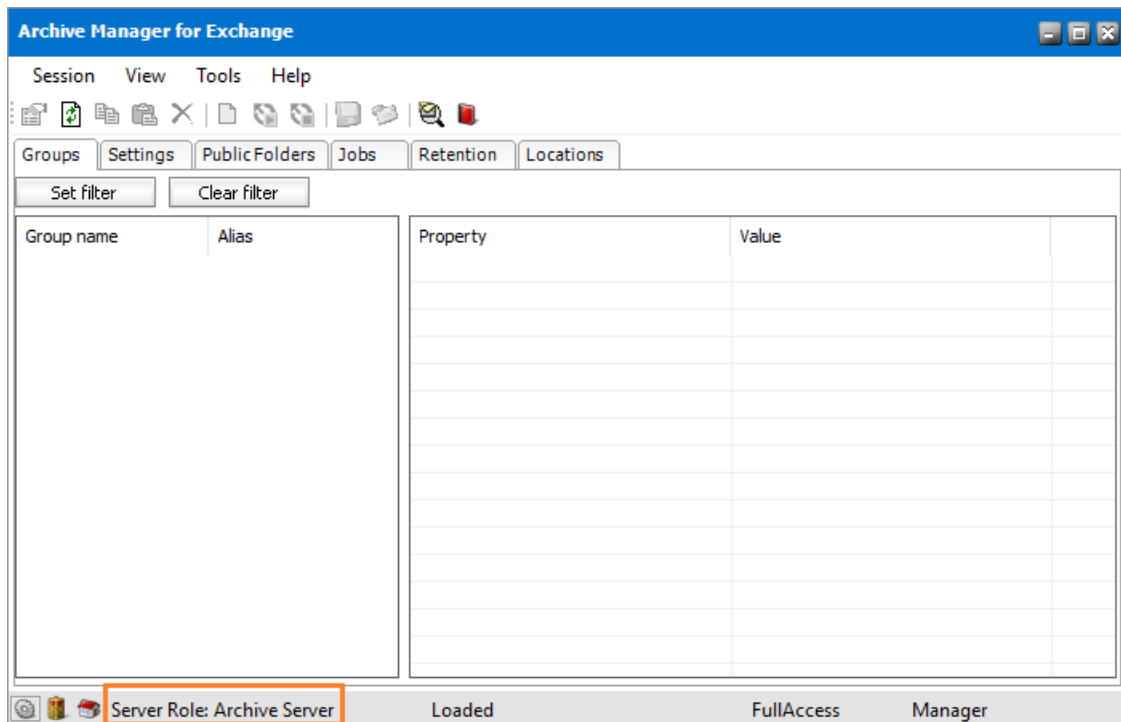
1. If the *Post installation Tasks* wizard is not already open, you can open the the *Post installation Tasks* wizard from `C:\Program Files (x86)\Metalogix\MAM4Exchange\Tools\LaunchTools\LaunchTools.exe`.
2. Click **Start** next to step 3 to start the services. You can also start services with the batch file available at <Installation folder> > **Metalogix** > **MAM4Exchange** > **Tools** > **Start.bat**.

**i** **NOTE:** To stop the services at any time you can use the batch file available at <Installation folder> > **Metalogix** > **MAM4Exchange** > **Tools** > **Stop.bat**.

## Steps to configure and verify the Archive Server

Unless you manually change the role, every installation of the Archive Manager for Exchange will automatically assign the **Archive Server** role to the installed instance. The **Archive Server** role indicates that this is the primary server and all administration tasks are controlled from this server.

1. If the *Post installation Tasks* wizard is not already open, you can open the the *Post installation Tasks* wizard from `C:\Program Files (x86)\Metalogix\MAM4Exchange\Tools\LaunchTools\LaunchTools.exe`.
2. Click **Start** next to step 4 of the the *Post installation Tasks* wizard to open the AMAC. You can also open the Archive Manager for Exchange Administration Center (AMAC) from **Start** > **Archive Manager for Exchange**. The AMAC opens.



3. On the status bar at the bottom of the window, verify that the **Server Role** is set to **Archive Server**.
4. The *Address Book Setup* wizard opens automatically for a new installation. Click **Close** to exit the wizard. Then close the Address Book Manager window that opens. For a manual installation, Address Book setup can be done at a later step. For more information see [Setup the Address Book](#).

**i** **NOTE:** Whenever an Archive Manager for Exchange server is installed, the default role assigned is *Archive Server*. These servers are also identified with a **MultiServerID** and a **LocationID** which are integers that default to 1. Large organizations with more than 3000 mailboxes use more than one Archive server. Since the **MultiServerID** and **LocationID** of each Archive server must be unique, you must manually change the **MultiServerID** and **LocationID** of each extra Archive server by changing the following registry key values. For example, for a second Archive server, set the following registry key values to 2, for a third Archive server set the registry key values to 3, and so on.

```
HKEY_LOCAL_MACHINE > SOFTWARE > Wow6432Node > Metalogix > exchangePAM > MultiServerID
```

```
HKEY_LOCAL_MACHINE > SOFTWARE > Wow6432Node > Metalogix > exchangePAM > OfflineStorage > LocationID
```

## Install the Retrieve server

In this topic:

- [Worksheet for this installation](#)
- [Steps to install Archive Manager for Exchange](#)
- [Steps to configure the Archive Manager database](#)
- [Steps to install the Archive Manager database](#)
- [Steps to configure the User database](#)
- [Steps to install the User database](#)
- [Steps to start the Archive Manager services](#)
- [Steps to set the Retrieve Server role](#)
- [Steps to verify the Retrieve Server role](#)

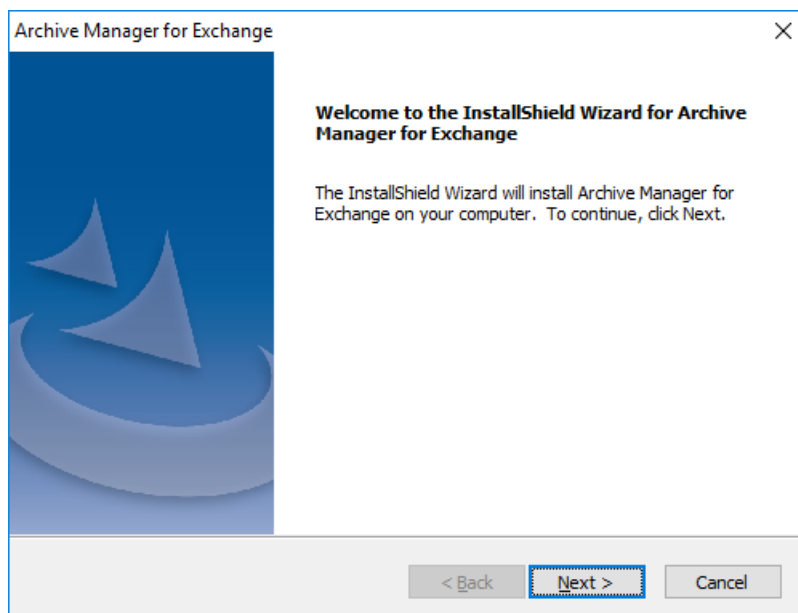
### Worksheet for this installation

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

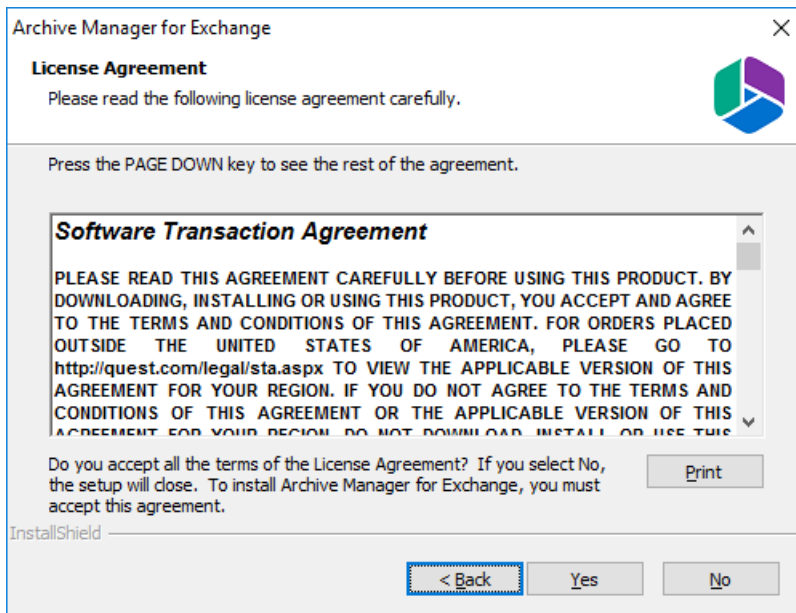
Item	Description	Example
License Key	The license key that you received from Quest. If you don't have a license key, contact your Quest representative.	894K5-3M448-M544E-A594A-7K8Z7 (Sample only. This key is neither an active nor an expired license key)
Archive manager for Exchange server	The server where the Archive Manager for Exchange will be installed.	AMXSERVER-R
Superuser account	Windows account that is used to install the application and run the Archive Manager for Exchange services.	username: democorp\mamadmin 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
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.	AMXDB
HSM server	The server where HSM is installed.	AMXHSM
Search server	The server where the Archive Manager Search is installed.	AMXHSM

# Steps to install Metalogix Archive Manager for Exchange

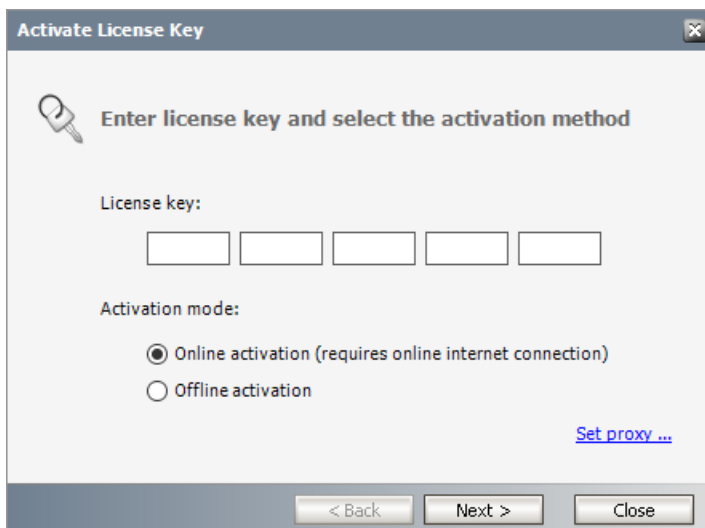
1. Login to the server with the credentials of the superuser (eg. **democorp\mamadmin**)
2. Run the **Metalogix Archive Manager Installation Package** to extract the files to a local folder.
3. Close the integrated installer wizard which starts automatically.
4. Run the Archive Manager Search setup from <Media folder>\C:\Metalogix\Archive Manager Installation Package\Exchange\Archive Manager for Exchange Setup.exe.
5. A prerequisite check occurs and missing requirements if any are displayed. Click **Install** to ensure all missing requirements are installed.
6. The *Welcome* window of the Archive Manager for Exchange installer opens.



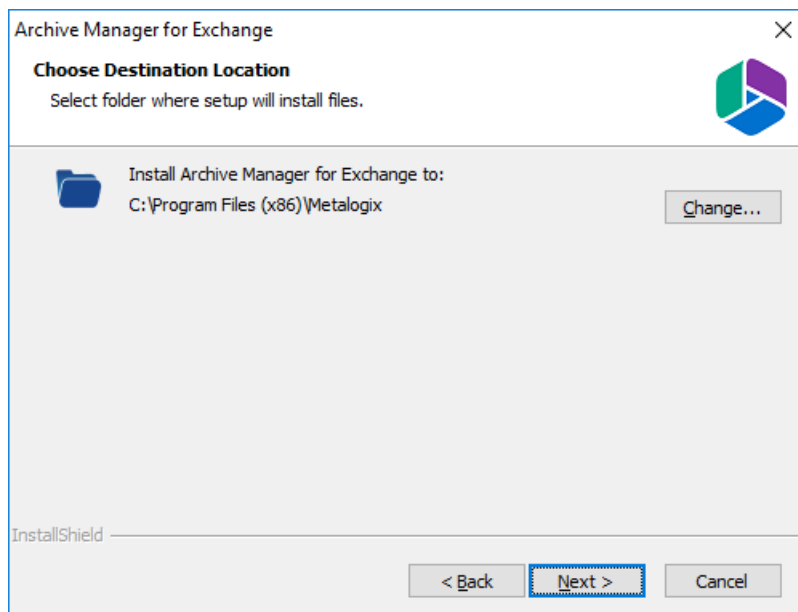
7. Click **Next**. The *License Agreement* window opens.



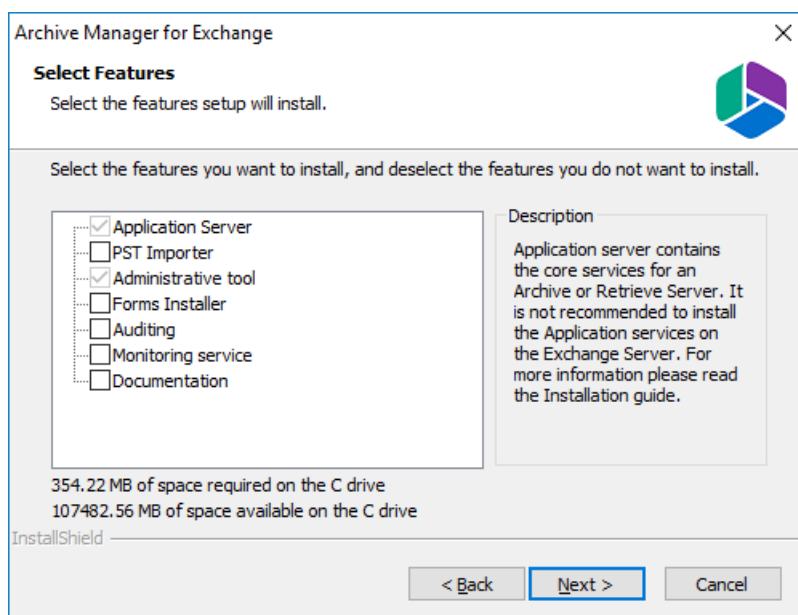
8. Click **Yes** to accept the license. The *License Key* window opens. Click **Print** if you wish to print the license agreement.



9. If you are connected to the internet, select **Online activation** or see [License Activation](#) for more options. Click **Next**. When your license is activated, you will see a confirmation message and the license details. Click **Finish** to close the **Activate License Key** dialog.



10. Click **Change** to choose another installation folder or keep the default and click Next. The *Select Features* window opens.

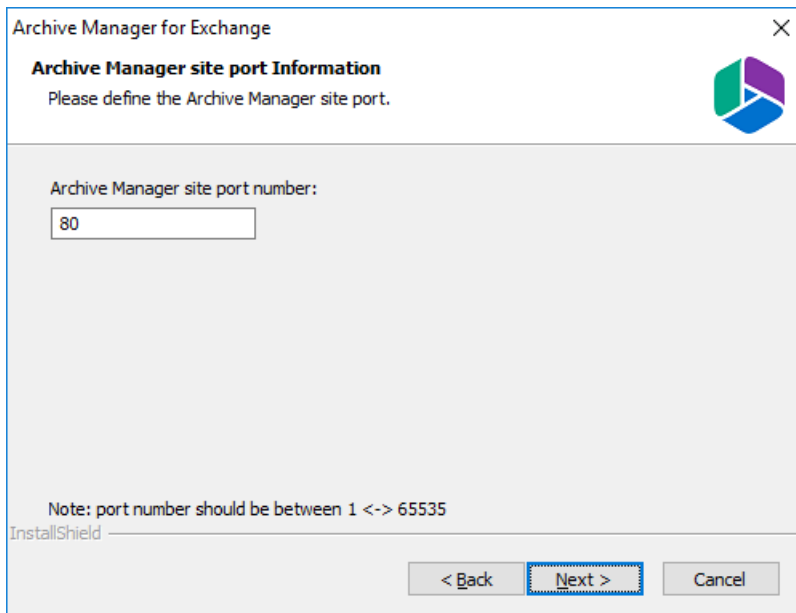


Keep on the mandatory features. Uncheck all other check boxes.

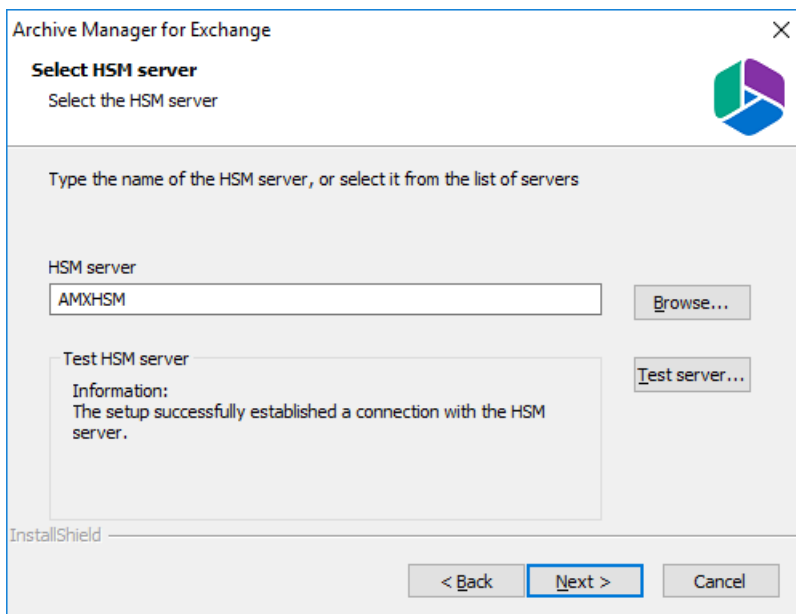
- Application Server
- Administrative tool

11. Click **Next**. The *Archive Manager site port Information* window opens.





12. Keep the default port 80 unless there are other application co-located on this server that also use port 80. Click **Next** and the *Select HSM server* window opens.



In the **HSM server** field, enter the name, FQDN or IP address of the server where the HSM application feature was installed. You can click **Browse** to locate the server in the domain.

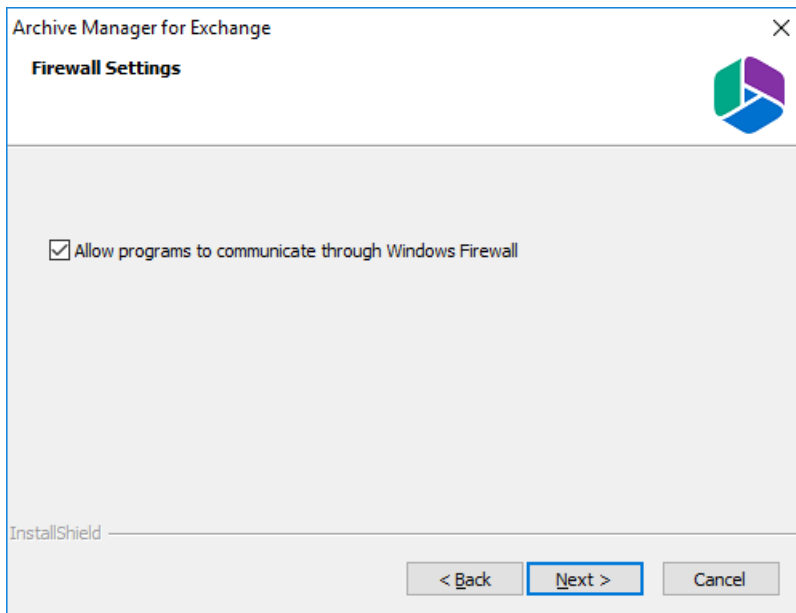
13. Click **Test server** to verify the connection and then click **Next**. The *Search server* window opens.

Check the **Enable Archive Manager Search** to enable search functionality from this server. In the **Search server** field, enter the name, FQDN or IP address of the server where the HSM application feature was installed. You can click **Browse** to locate the server in the domain.

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

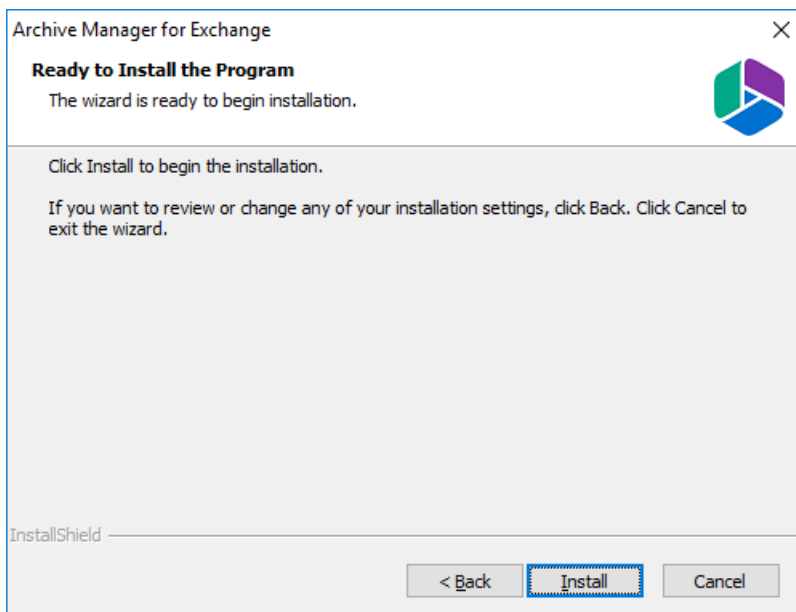
In the **User name** field, specify the superuser name (eg. **democorp\mamadmin**) and **Password**. Enter the password again in the **Confirm password** field.

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

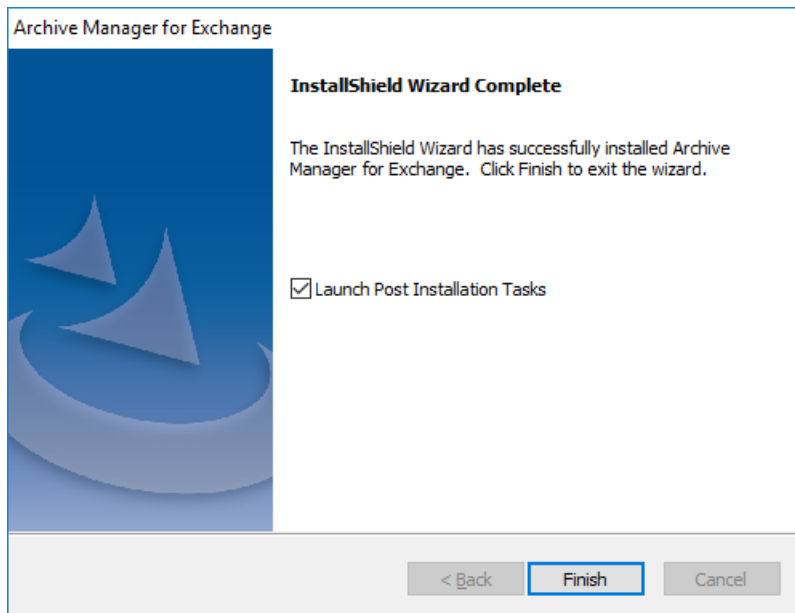


Select the **Allow programs to communicate through Windows Firewall** check box. Metalogix Archive Manager for Exchange features will be then able to communicate through the firewall.

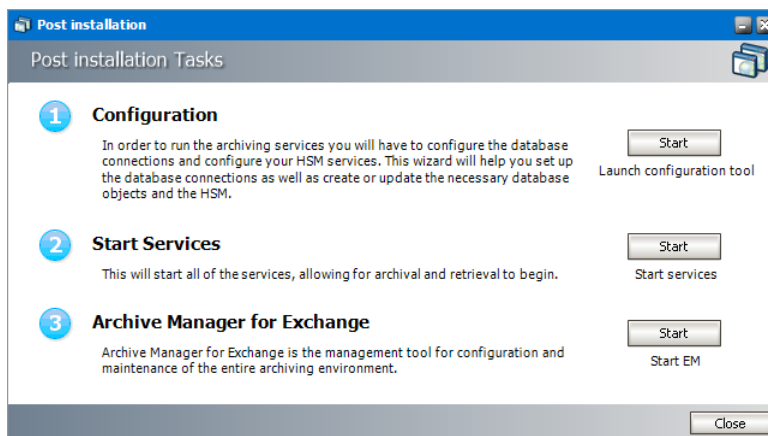
16. Click **Next**. The *Ready to Install the Program* window opens.



17. Click **Install** to start the installation. When the installation completes, the *InstallShield Wizard Complete* window opens.

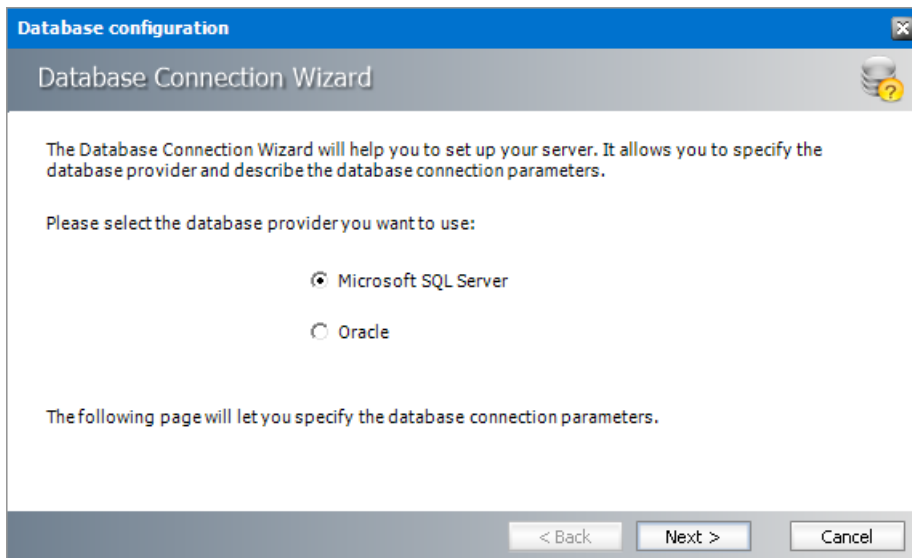


18. Select the *Launch Post Installation Tasks* check box and click **Finish**. The *Post installation Tasks* wizard opens.

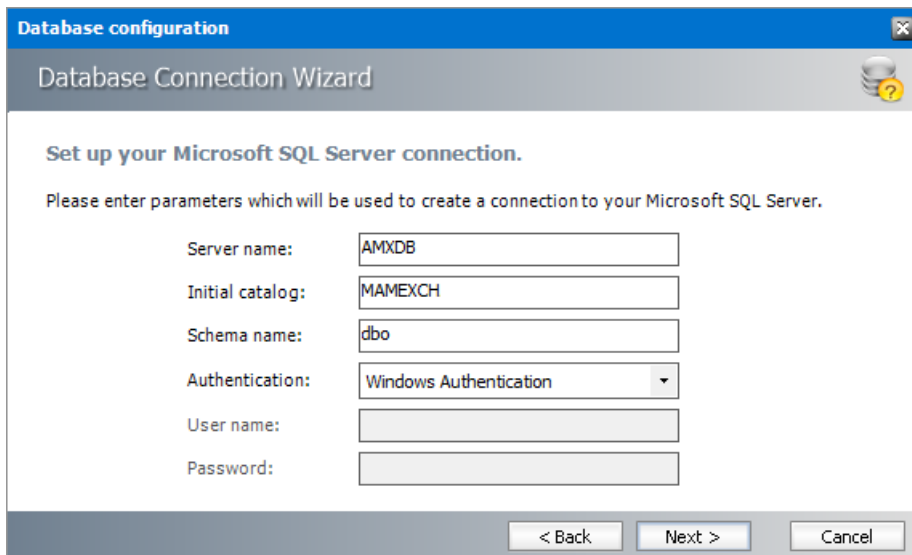


## Steps to configure the Archive Manager database

1. When the installation completes, the *Post installation Tasks* wizard opens. You can open the the *Post installation Tasks* wizard from `C:\Program Files (x86)\Metalogix\MAM4Exchange\Tools\LaunchTools\LaunchTools.exe`.
2. Click **Start** next to the Configuration step to open the *Configuration* wizard. To directly open the *Configuration* wizard click **Start > Metalogix > Archive Manager Configuration**.
3. From the feature panel on the left, click **Archive Manager** and select the **Database** tab.
4. Click **Configure**. The *Database Connection Wizard* opens.



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

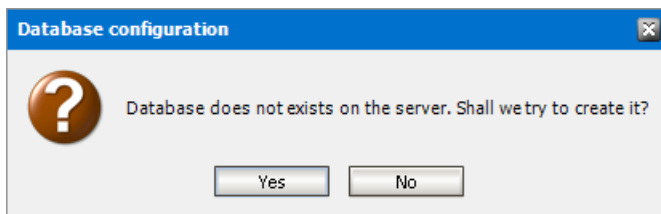


*For Microsoft SQL Server*

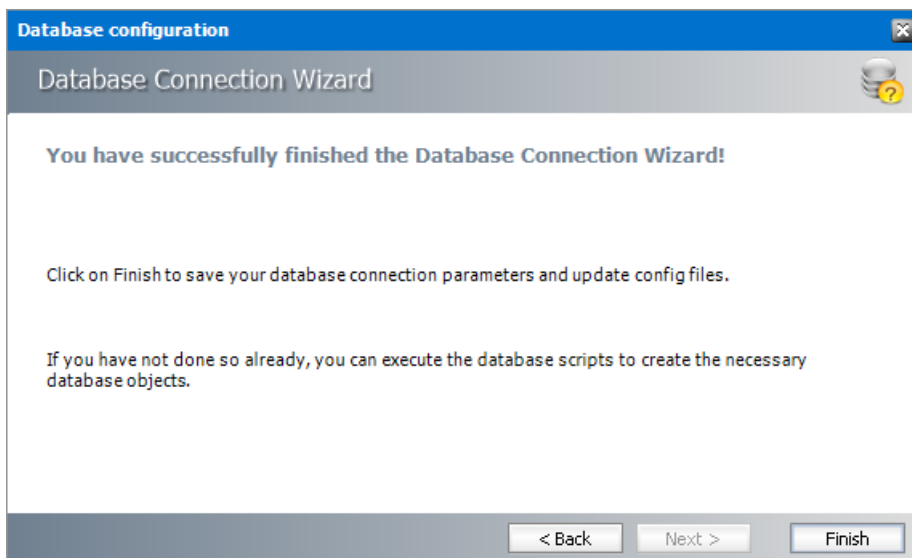
- a. **Server name** - name of the SQL server (eg. **AMXDB**)
- b. **Initial catalog** - name of the HSM database (e.g. **MAMEXCH** which is the default name of the Archive Manager for Exchange database)
- c. **Schema name** - name of the SQL Schema (e.g. **dbo**)
- d. **Authentication** – authentication 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.
- £. **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. **AMXDB**)
  - b. **Schema** - name of the HSM database (e.g. **MAMEXCH** which is the default name of the Archive Manager for Exchange database)
  - c. **User name** - database login user name
  - d. **Password** - password of the database user
6. Click **Next** and then click **Yes** on the confirmation dialog that opens.



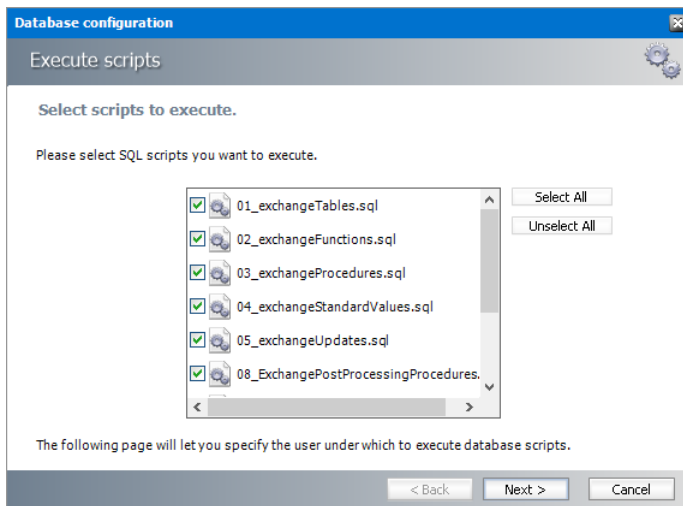
7. If the database connection is setup successfully, the confirmation window opens.



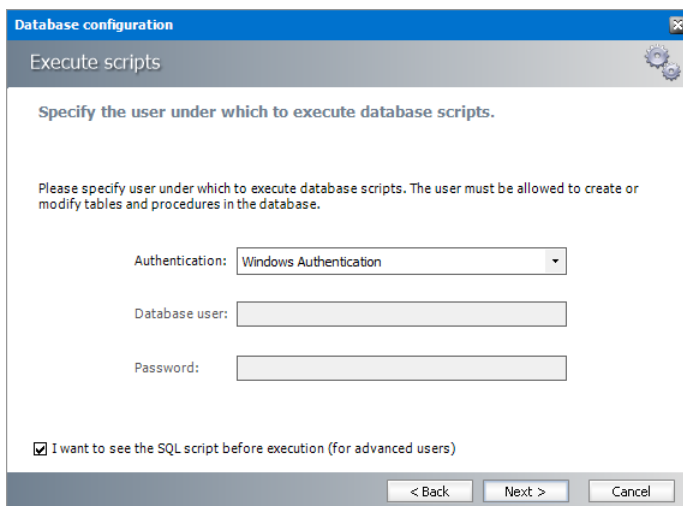
8. Click **Finish** to close the *Database Connection* wizard.

## Steps to install the Archive Manager 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.

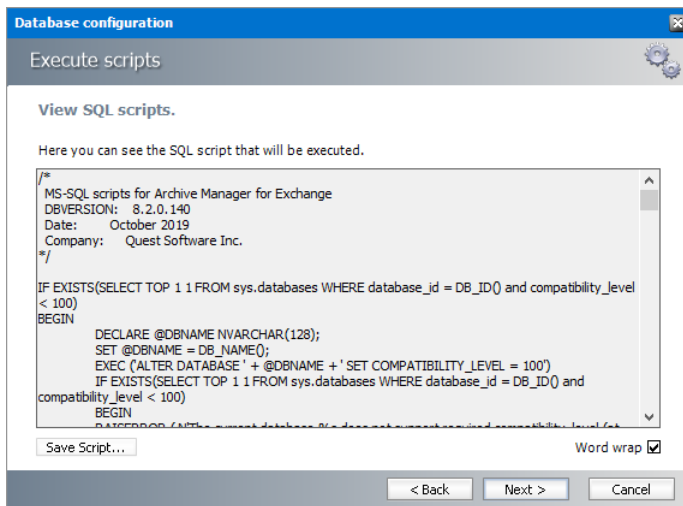


3. Click **Select All** to select all check boxes. Click **Next**. The *View SQL scripts* window opens.
4. Click **Next**. The *Run Scripts* authentication window opens.



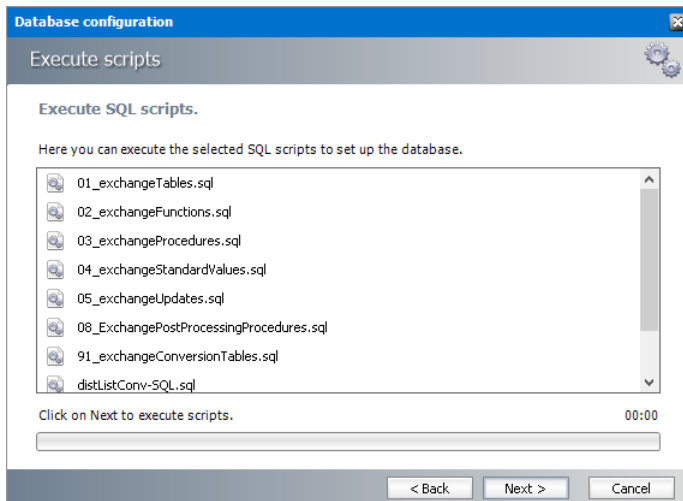
Enter the information as described below:

- 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



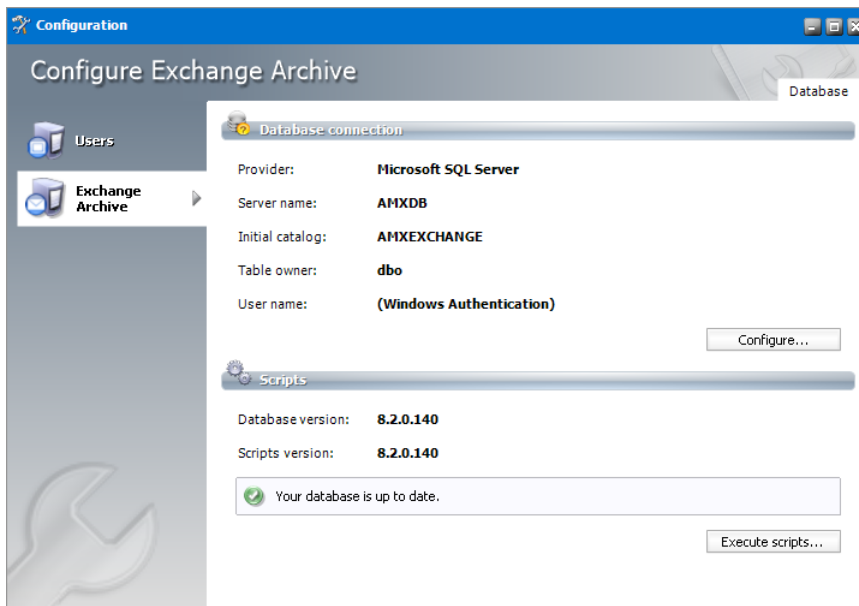
Click **Save Script** to save the script as a script file to a folder. Check the **Word wrap** check box to display long lines as multiple lines of text.

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 (the version of the scripts you install may differ from the version shown in the image below).

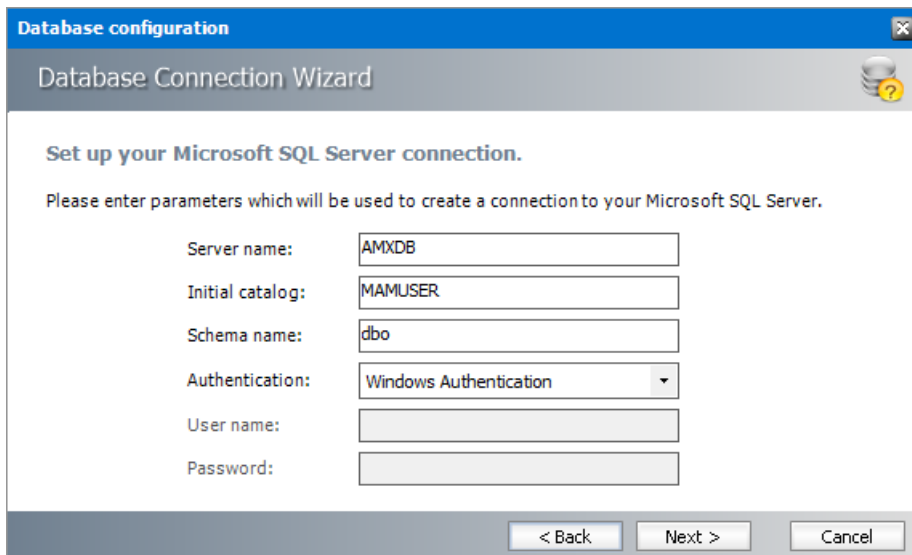




8. Close the *Configuration* wizard.

## Steps to configure the User database

1. Open the *Configuration* wizard if it is not already open.
2. From the feature panel on the left, click **Users** and then 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 SQL Server

- a. **Server name** - name of the SQL server (eg. **AMXDB**)
- b. **Initial catalog** - name of the HSM database (e.g. **MAMUSER** which is the default name of the Archive Manager for Exchange 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.

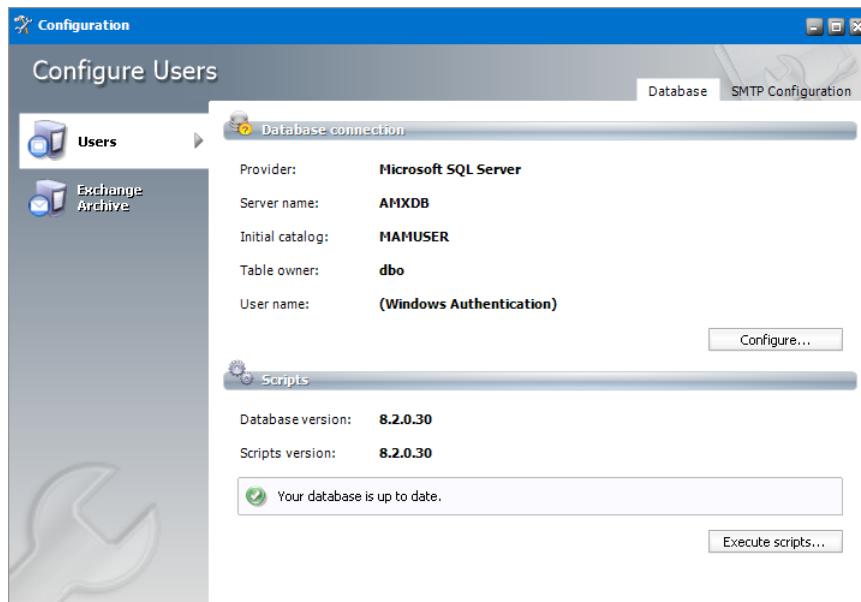
#### For Oracle

- a. **Oracle net name** - net service name that describes the network address of the database server in your `tnsnames.ora` file (eg. **AMXDB**)
  - b. **Schema** - name of the Auditing schema (e.g. **MAMUSER** which is the default name of the Archive Manager for Exchange 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 User database

1. From the feature panel on the left in the *Configuration* wizard, click **Auditing** 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.
5. 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.
6. 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

7. 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.
8. Click **Next**. The *Run SQL scripts* window reopens with the scripts you have chosen to run.
9. 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.



10. Close the *Configuration* wizard.

## Steps to start the Archive Manager for Exchange services

1. If the *Post installation Tasks* wizard is not already open, you can open the the *Post installation Tasks* wizard from `C:\Program Files (x86)\Metalogix\MAM4Exchange\Tools\LaunchTools\LaunchTools.exe`.
2. Click **Start** next to step 2 to start the services. You can also start services with the batch file available at <Installation folder> > **Metalogix** > **MAM4Exchange** > **Tools** > **Start.bat**.

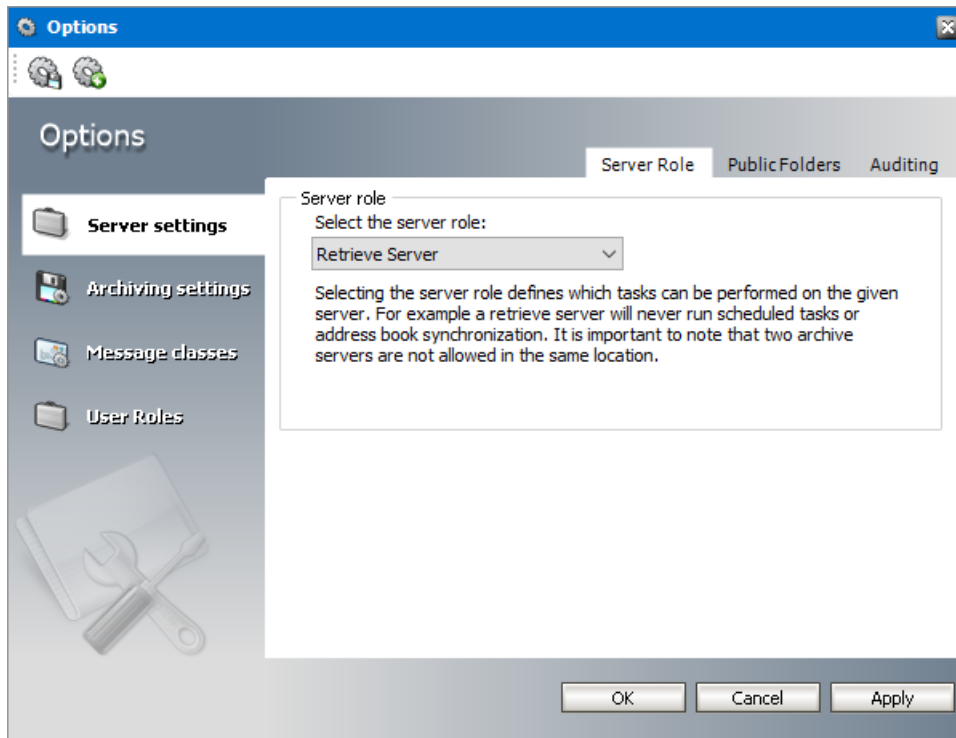
**i** **NOTE:** To stop the services at any time you can use the batch file available at <Installation folder> > **Metalogix** > **MAM4Exchange** > **Tools** > **Stop.bat**.

## Steps to set the Retrieve Server role

Unless you manually change the role, every installation of the Archive Manager for Exchange will automatically assign the **Archive Server** role to the installed instance. You must set the **Retrieve Server** role for this server.

1. If the *Post installation Tasks* wizard is not already open, you can open the the *Post installation Tasks* wizard from `C:\Program Files (x86)\Metalogix\MAM4Exchange\Tools\LaunchTools\LaunchTools.exe`.

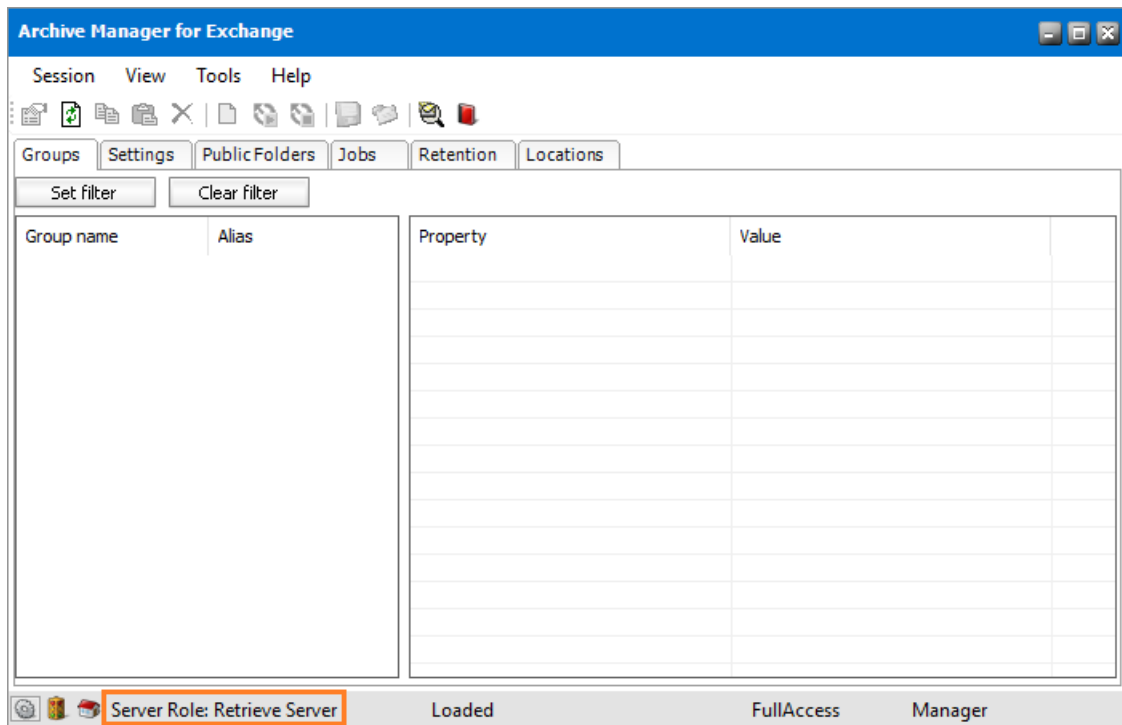
2. Click **Start** next to step 3 of the the *Post installation Tasks* wizard to open the AMAC. You can also open the AMAC from **Start > Archive Manager for Exchange**. The AMAC opens.
3. From the **Tools** menu select **Options**. The *Options* window opens.



4. From the **Select the server role** drop down list, select **Retrieve Server**.
5. Click **OK** to set the server role and close the window and restart the server.

## Steps to verify the Retrieve Server role

1. Login to the server with the credentials of the superuser (eg. **democorp\mamadmin**)
2. Click **Start > Archive Manager for Exchange**. The AMAC opens.



On the status bar at the bottom of the AMAC window, verify that the **Server Role** is set to **Retrieve Server**.

# Application Configuration

In this chapter

- [Setup the Address Book](#)
- [Publish Archive Manager Forms](#)

## Setup up the Address Book

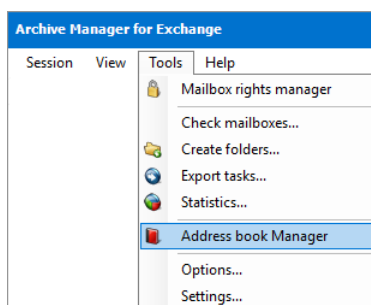
You must import the Microsoft Exchange servers, mailboxes and groups and keep them in synch to facilitate email archiving. With the Address Book Manager, you can import the servers, mailboxes and groups and schedule automatic synchronization jobs to keep the Metalogix Archive Manager for Exchange database up to date and synchronized with the Active Directory.

In this chapter:

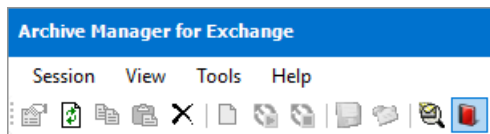
- [Steps to open the Address Book Manager](#)
- [About the Address Book Manager](#)
- [Importing Exchange Servers](#)
- [Importing Mailboxes](#)
- [Importing or Creating Groups](#)
- [Synchronizing Address Book Manager](#)

## Steps to open the Address Book Manager

1. Log in to the Metalogix Archive Manager for Exchange console.
2. From the **Tools** menu, click **Address Book Manager**.



or, from the toolbar, click **Address Book Manager**



3. If no Microsoft Exchange servers, mailboxes or groups are available in the Address Book Manager, the *Address Book Setup wizard* opens. Otherwise the Address Book Manager window opens.

## About the Address Book Manager

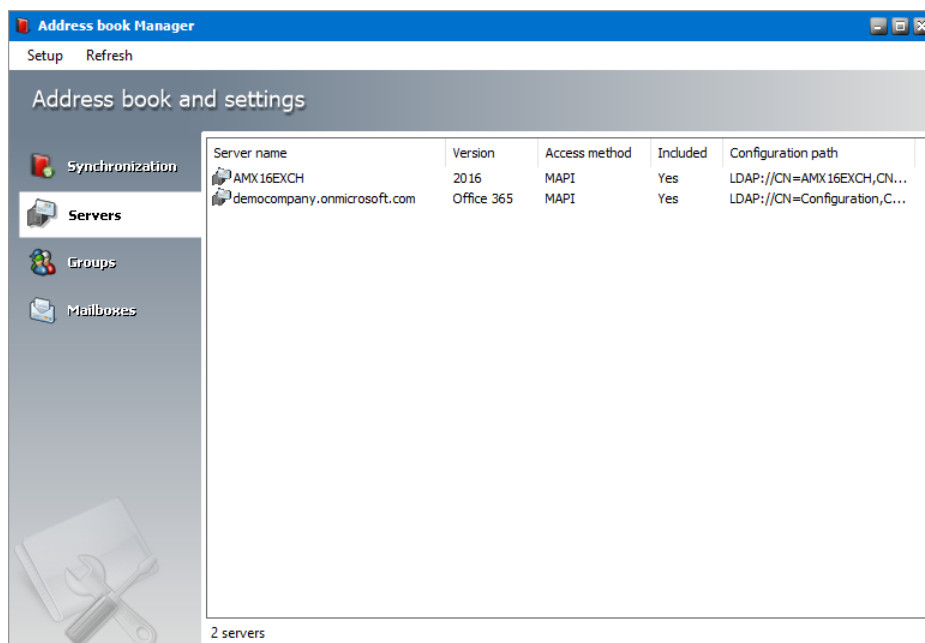
The Address Book Manager window provides two menu options:

**Setup** - starts the *Address Book Setup wizard* that provides a step-by-step guide to add Microsoft Exchange servers, mailboxes and groups. If no Microsoft Exchange servers, mailboxes or groups are available in the Address Book Manager, the *Address Book Setup wizard* opens by default when you open the Address Book Manager.

**Refresh** - reloads information about Microsoft Exchange servers, mailboxes and groups based on the available configuration settings.

The management of Microsoft Exchange servers, mailboxes, groups and synchronization settings are organized by tabs in the Address Book Manager window.

- **Synchronization** – for manual or automatic synchronization of mailboxes, groups and permissions with the Active Directory of available servers.
- **Servers** – for adding, removing and managing Microsoft Exchange servers.
- **Groups** – for importing groups, creating user-defined groups and managing group features.
- **Mailboxes** – for importing new mailboxes and managing mailboxes.



# Importing Exchange Servers

In this topic:

[Options for importing Microsoft Exchange servers](#)

[Steps to add on-premise Microsoft Exchange servers](#)

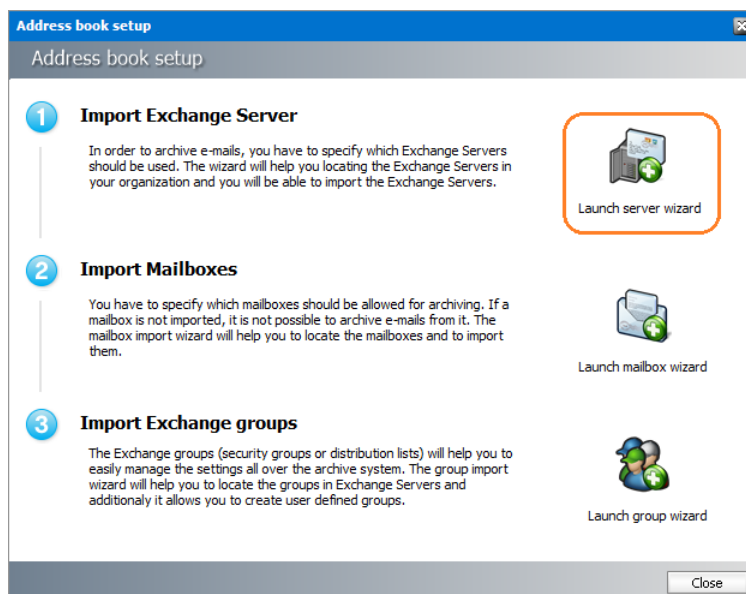
[Steps to add online Microsoft Exchange servers](#)

[Steps to verify the imported Microsoft Exchange servers](#)

## Options for importing Microsoft Exchange servers

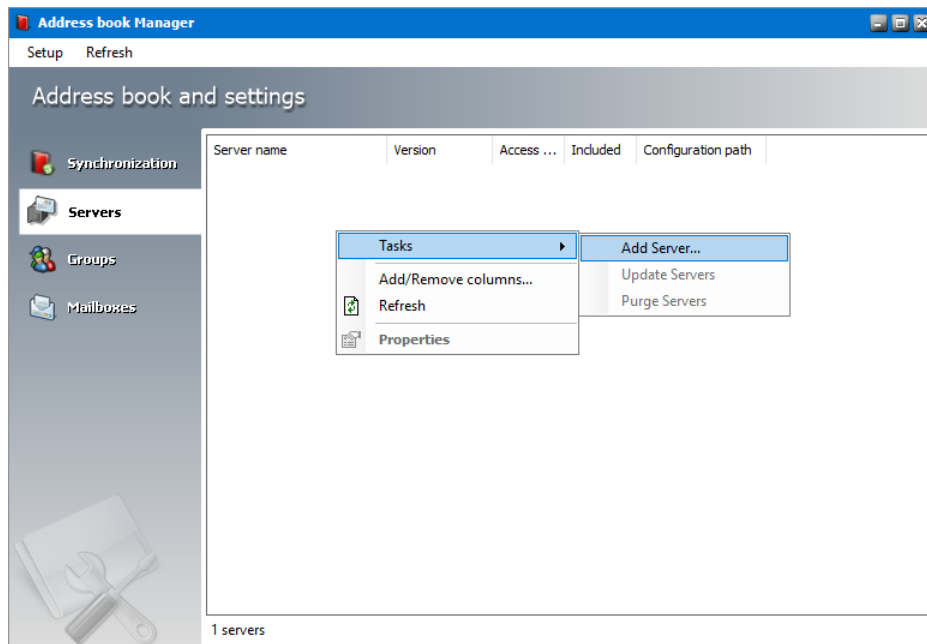
Microsoft Exchange Servers can be added to the Address Book Manager in one of two ways:

- **Option 1** - By using the Address Book Setup Wizard.
  1. Open the Address Book Manager.
  2. From the **Setup** menu, click **Setup Wizard**. The *Address book setup wizard* opens.
  3. Click the **Launch server wizard** to initiate the import process.



- **Option 2** - By starting a task from the **Servers** tab of the **Address Book Manager**.
  1. Open the Address Book Manager.
  2. Click the **Servers** tab.
  3. Right-click inside the list view and from the context menu point to **Tasks** and select **Add Server...** to initiate the import process.

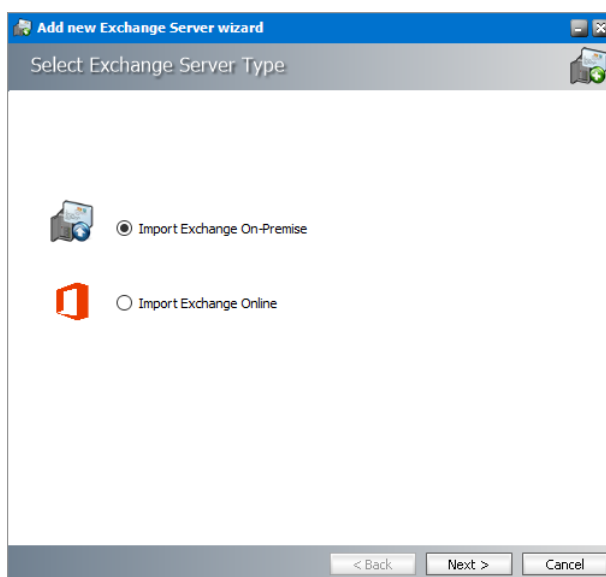




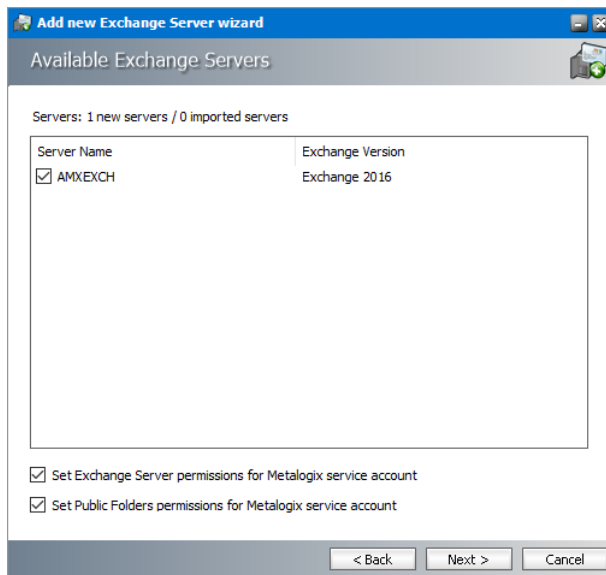
Whichever method you choose, the *Select Exchange Server Type* window opens.

## Steps to add on-premise Microsoft Exchange servers

1. In the *Select Exchange Server Type* window, select **Import Exchange On-Premise**.

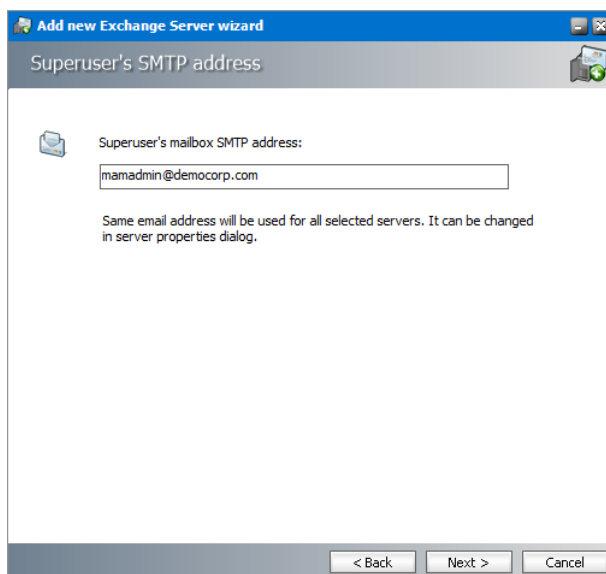


2. Click **Next**. A list of Microsoft Exchange Servers appear that are accessible within your trusted domain.

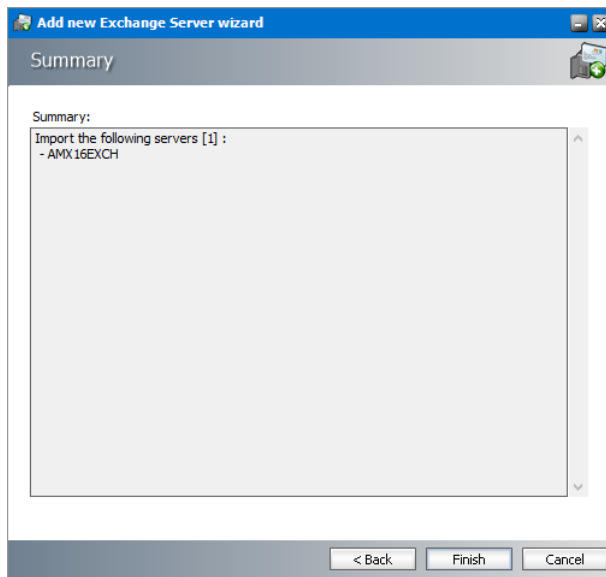


Select the servers that contain the mailboxes and folders you want to archive and then select the check boxes to set the permissions as described below:

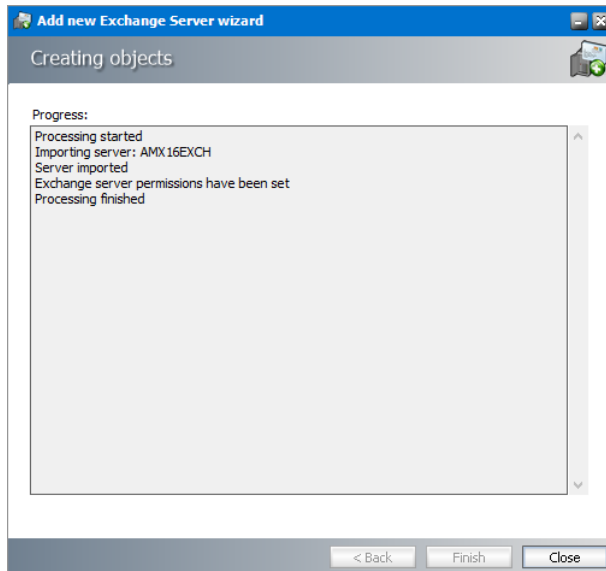
- a. **Set Exchange server permissions for Metalogix service account** - grants elevated rights to the superuser on each of the selected Microsoft Exchange Servers.
  - b. **Set Public Folder permissions for Metalogix service account** - grants OWNER permission to the Public folders.
3. Click **Next**. The *Superuser's mailbox SMTP address* window opens. In the **Superuser's mailbox SMTP address** field, enter the email address of the superuser if not already filled in. You can change the email from the server **Properties** window.



4. Click **Next**. The **Summary** window opens that lists the on-premise servers that will be added.



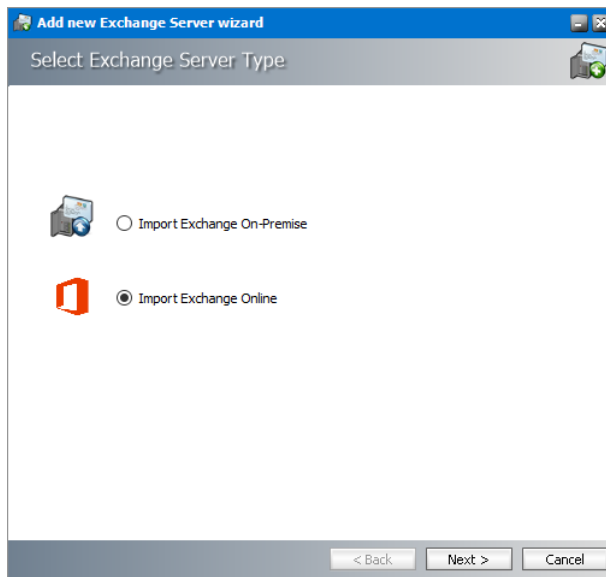
5. Click **Finish** to start the import process. The *Creating objects* window opens. You can click **Back** to select more servers to add or remove some of the selected servers.



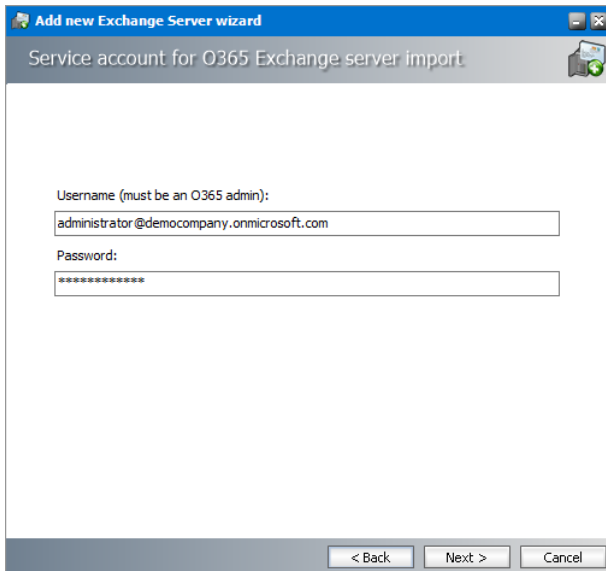
6. When the import process has completed, click **Close**.

## Steps to add online Microsoft Exchange servers

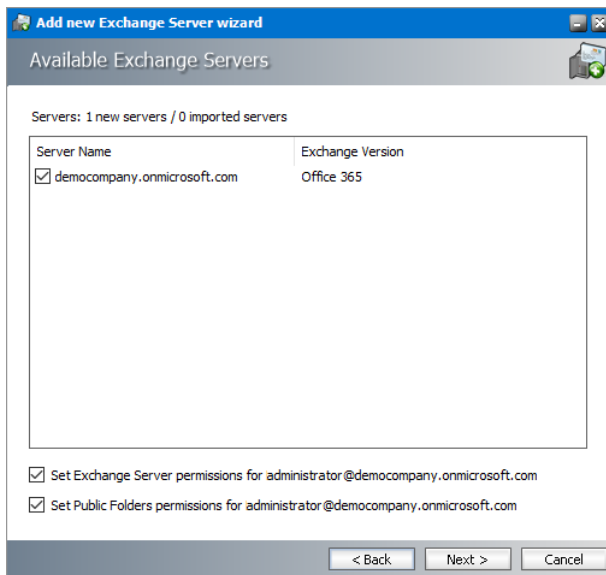
1. In the *Select Exchange Server Type* window, select **Import Exchange Online**.



2. Click **Next**. The *Service account for O365 Exchange server import* window opens. Enter the administrator credentials for the Microsoft Exchange online server.

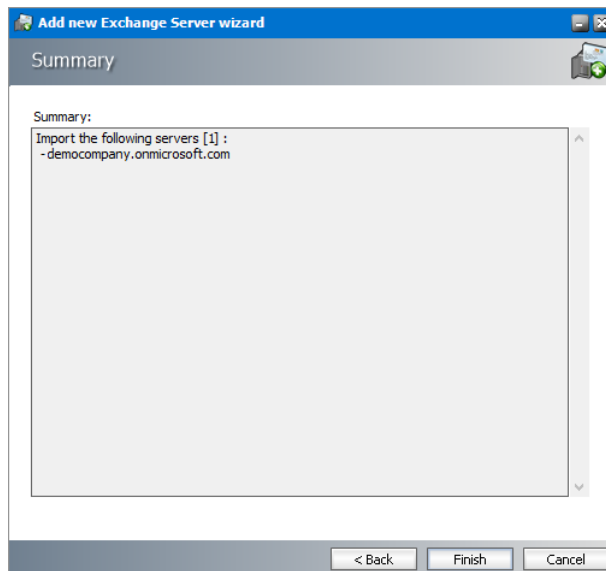


3. Click **Next**. The *Available Exchange Servers* window opens. Select the desired Office 365 instance.

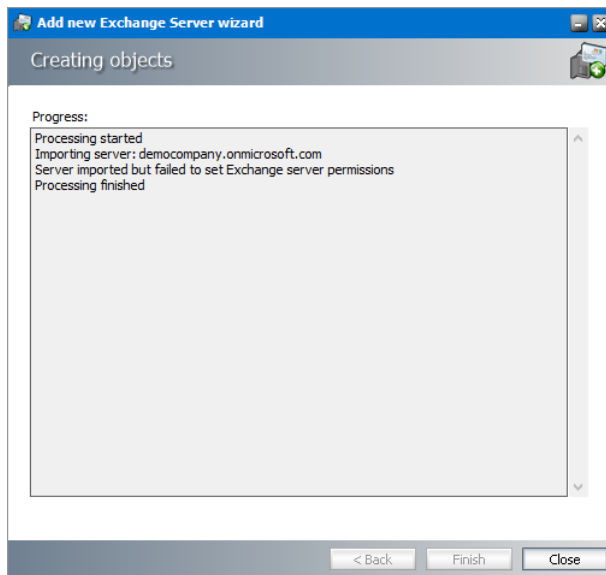


Select the servers that contain the mailboxes and folders you want to archive and then select the check boxes to set the permissions as described below:

- a. **Set Exchange server permissions for <Office 365 administrator>** - grants elevated rights to the O365 administrator on each of the selected Microsoft Exchange Servers.
  - b. **Set Public Folder permissions for <Office 365 administrator>** - grants OWNER permission for the Public folders to the O365 administrator.
4. Click **Next**. The *Summary* window opens that lists the online Microsoft Exchange servers that will be added.



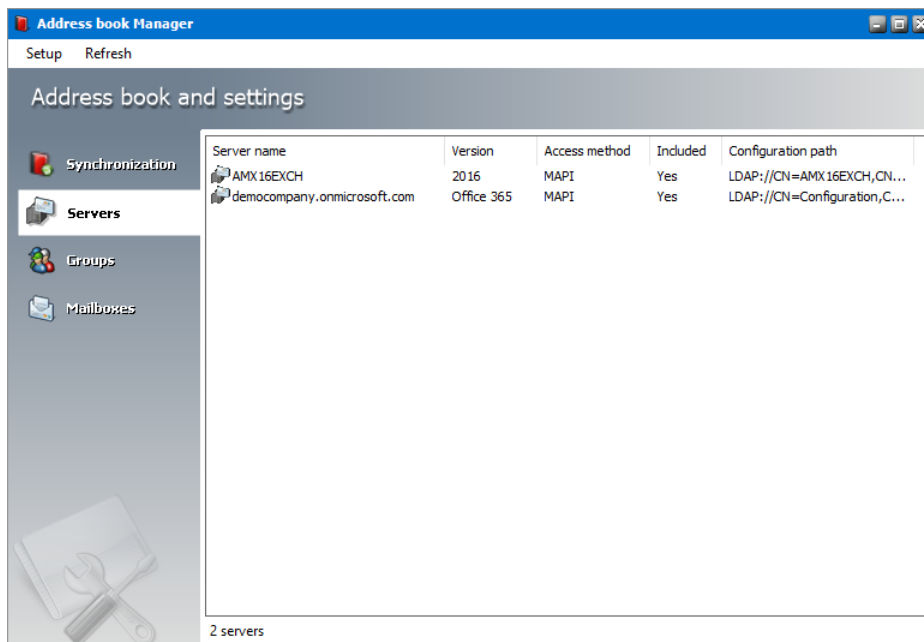
5. Click **Finish** to start the import process. The *Creating object* window opens. You can click **Back** to select more servers to add or remove some of the selected servers.



- When the import process has completed, click **Close**.

## Steps to verify the imported Microsoft Exchange servers

- Open the Address Book Manager
- Click the **Servers** tab and verify the imported servers in the list view.



# Importing Mailboxes

In this topic:

[Options for importing mailboxes](#)

[Steps to import mailboxes from on-premise Microsoft Exchange servers](#)

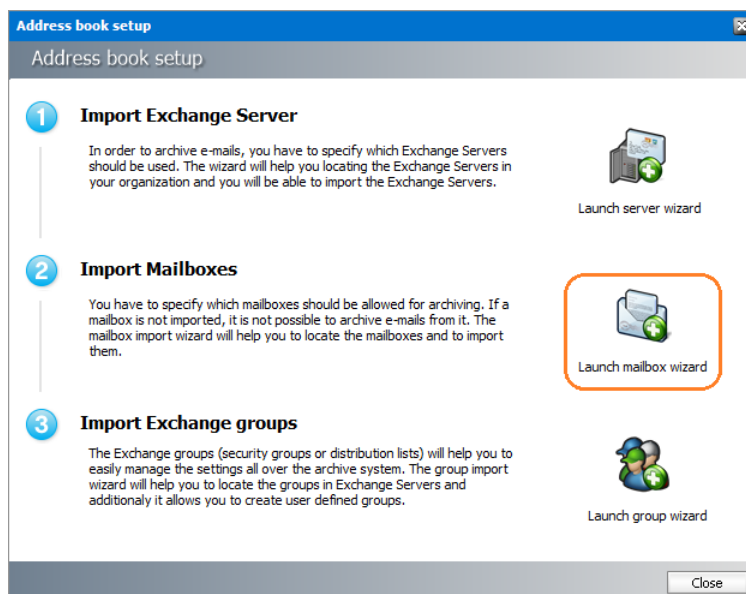
[Steps to import mailboxes from online Microsoft Exchange servers](#)

[Steps to verify the imported mailboxes](#)

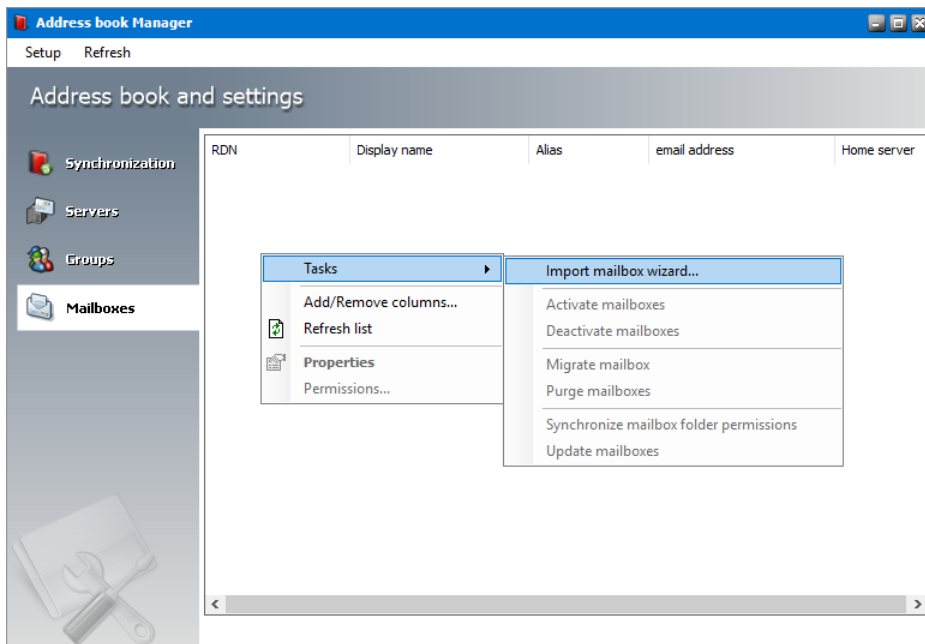
## Options for importing mailboxes

Microsoft Exchange server mailboxes can be added to the Address Book Manager in one of two ways:

- By using the Address Book Setup Wizard.
  1. Open the Address Book Manager.
  2. From the **Setup** menu, click **Setup Wizard**. The *Address book Setup wizard* opens.
  3. Click the **Launch mailbox wizard** to initiate the import process.



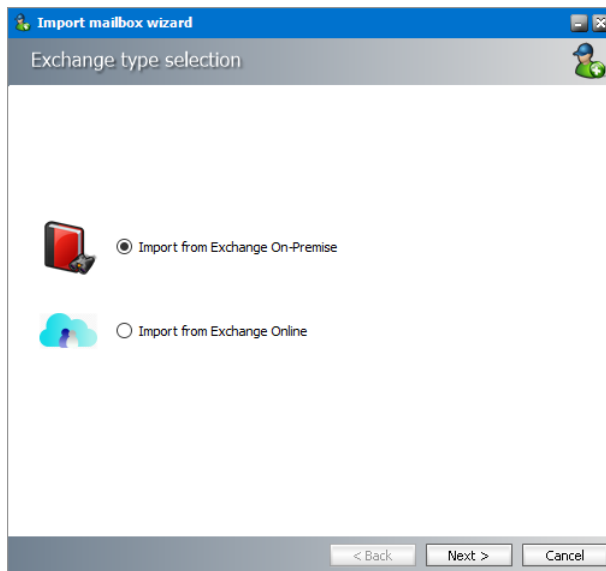
- By using the **Mailboxes** tab of the **Address Book Manager**.
  1. Open the Address Book Manager.
  2. Click the **Mailboxes** tab.
  3. Right-click inside the list view and from the context menu point to **Tasks** and select **Import mailbox wizard...** to initiate the import process.



Whichever method you choose, the *Import mailbox wizard* window opens.

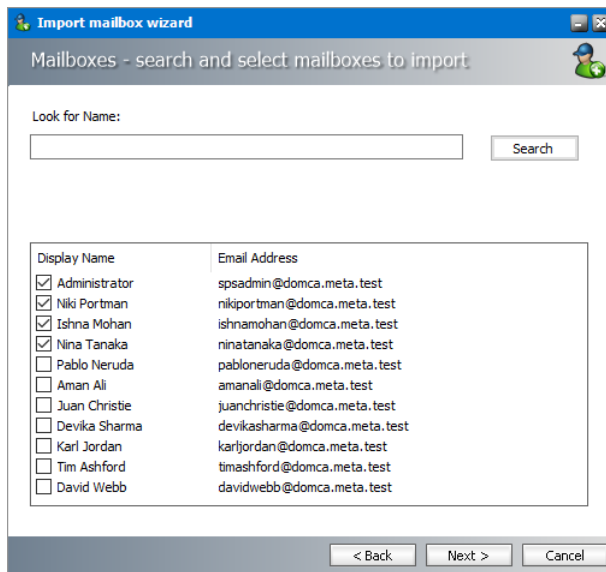
## Steps to import mailboxes from an on-premise Microsoft Exchange Server

1. In the *Select Exchange Server Type* window, select **Import from Exchange On-Premise**.



2. Click **Next**. The *Mailboxes - search and select mailboxes to import* window opens.



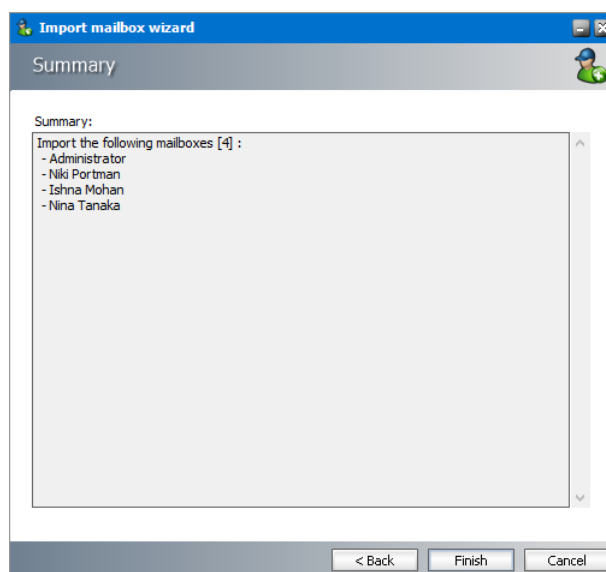


- Click **Search** to return the list of all mailboxes across all on-premise servers available to the Address Book Manager. To reduce the list of mailboxes, you can specify a search term in the **Look for Name** search box. Only the initial letters of the mailbox *Display Name* can be specified, and wildcards are not supported. The search term is case-insensitive. For example, if you enter **ni** as the search term and click **Search**, the mailboxes that start with the letters **ni** will be returned in the search results list.

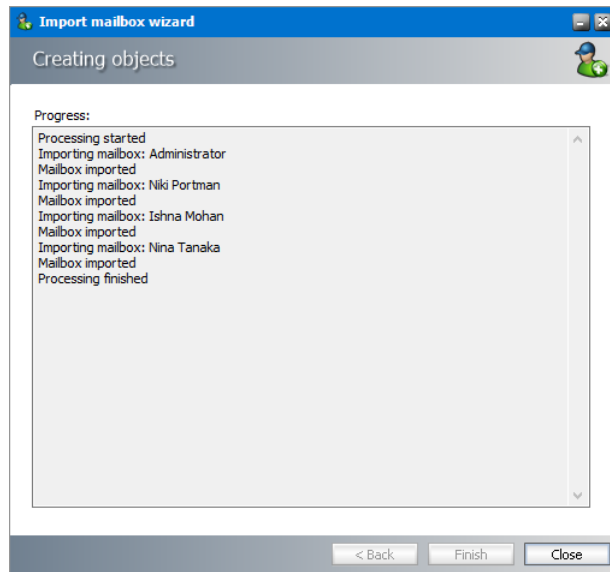
- Select one or more mailboxes that you want to import.

**i NOTE:** Mailboxes that are highlighted indicate that they already exist in the Address Book Manager. The list summary above the list of mailboxes will indicate how many mailboxes that you select are new, and how many already exist. If you select pre-existing mailboxes, they will be updated during the import process.

- Click **Next**. The *Summary* window opens that lists the mailboxes from the on-premise Microsoft Exchange servers that will be imported.



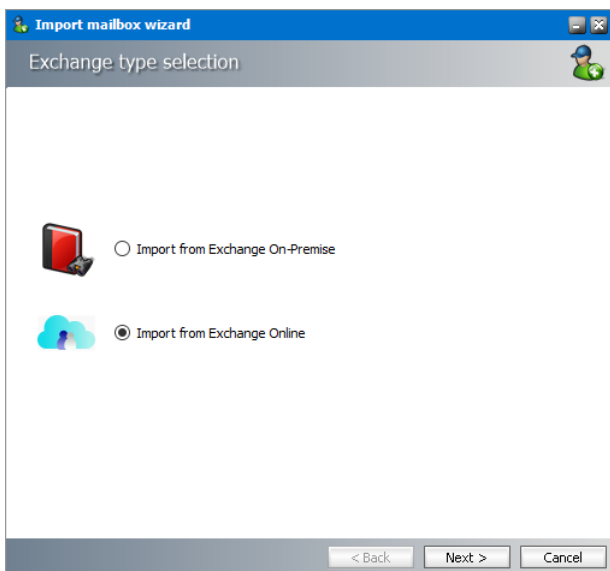
6. Click **Finish** to start the import process. The *Creating Object* window opens. You can click **Back** to select more mailboxes to add or remove some of the selected mailboxes.



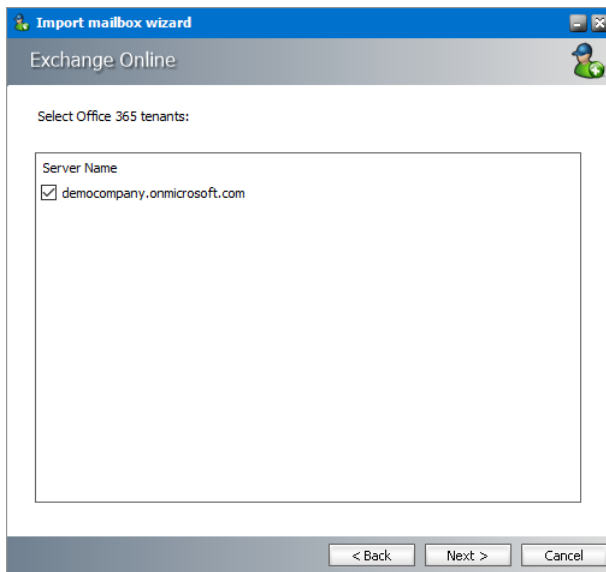
7. When the import process has completed, click **Close**.

## Steps to import mailboxes from an online Microsoft Exchange Server

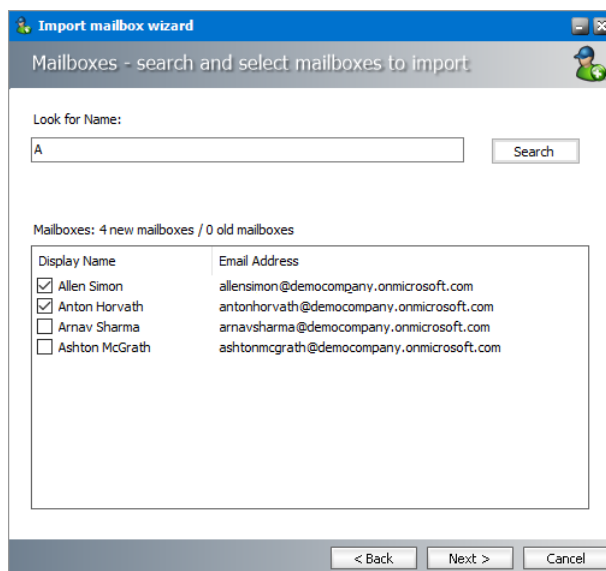
1. In the *Select Exchange Server Type* window, select **Import from Exchange Online**.



2. Click **Next**. The *Exchange Online* window opens. Select the desired Office 365 instance.



3. Click **Next**. The *Mailboxes - search and select mailboxes to import* window opens.

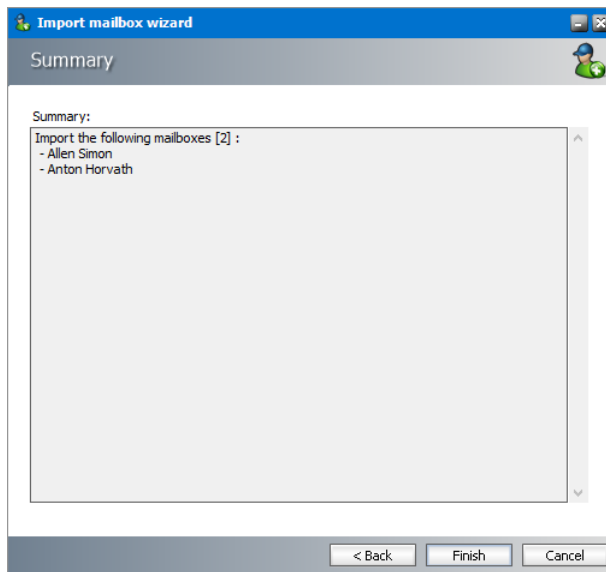


4. Click **Search** to return the list of all mailboxes across all on-premise servers available to the Address Book Manager. To reduce the list of mailboxes, you can specify a search term in the **Look for Name** search box. Only the initial letters of the mailbox *Display Name* can be specified, and wildcards are not supported. The search term is case-insensitive. For example, if you enter **A** as the search term and click **Search**, the mailboxes *that start with the letter A* will be returned in the search results list.

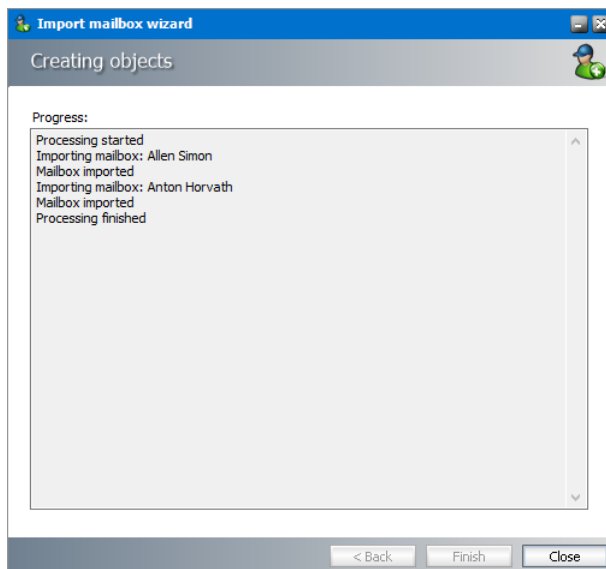
5. Select one or more mailboxes that you want to import.

**i** **NOTE:** Mailboxes that are highlighted indicate that they already exist in the Address Book Manager. The list summary above the list of mailboxes will indicate how many mailboxes that you select are new, and how many already exist. If you select pre-existing mailboxes, they will be updated during the import process.

6. Click **Next**. The **Summary** window opens that lists the online Microsoft Exchange servers that will be added.



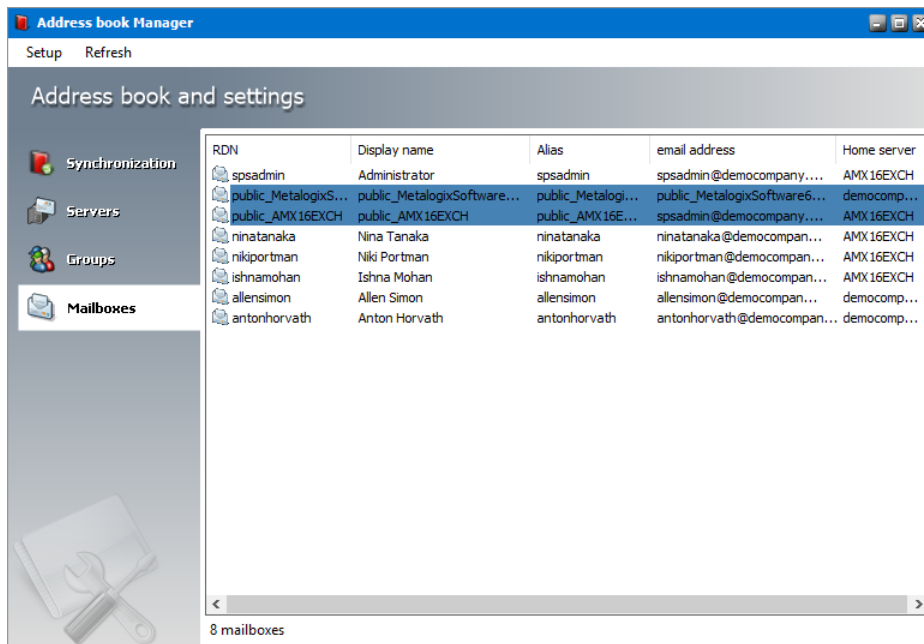
7. Click **Finish** to start the import process. The *Creating Object* window opens. You can click **Back** to select more mailboxes to add or remove some of the selected mailboxes.



8. When the import process has completed, click **Close**.

## Steps to verify the imported mailboxes

1. Open the Address Book Manager
2. Click the **Mailboxes** tab and verify the imported mailboxes in the list view.



#### NOTES:

Mailboxes with names like *public\_<name-of-Microsoft-Exchange-server>* also appear in the mailboxes list. These mailboxes are the public folders from the respective Microsoft Exchange server because Address Book Manager considers a public folder as a profile. These mailboxes are always highlighted in blue, so you can distinguish them faster.

Imported mailboxes must be added to a group in Address Book Manager to enable automatic archiving with scheduled jobs. If you do not add mailboxes to a group you can archive them manually. For more information about adding mailboxes to groups see the section “How to add members to a user defined Archive Manager group”.

## Importing or Creating Groups

Groups enable you to schedule archiving jobs. There must be at least one group (either imported from Active Directory or a user-defined group) if you plan to schedule archiving jobs. User-defined groups are not Active Directory groups.

In this topic:

[Options for importing groups](#)

[Steps to import groups from on-premise Microsoft Exchange servers](#)

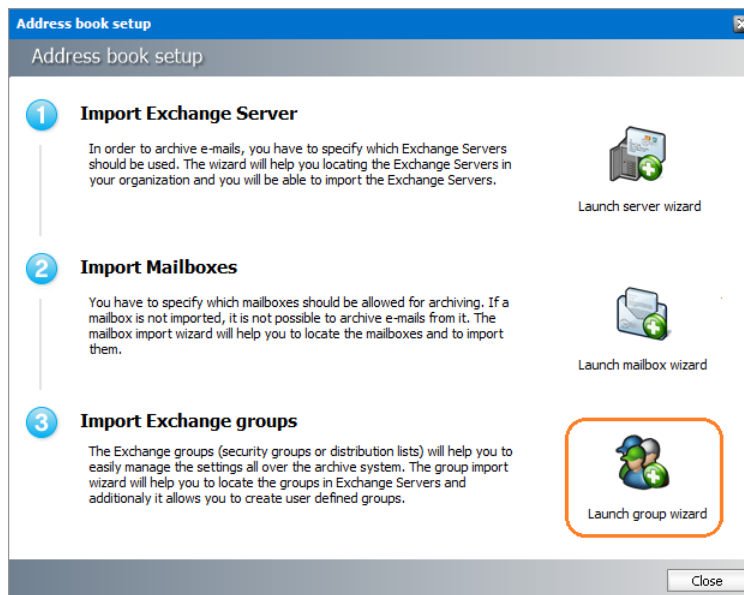
[Steps to import groups from online Microsoft Exchange servers](#)

[Steps to create user-defined groups](#)

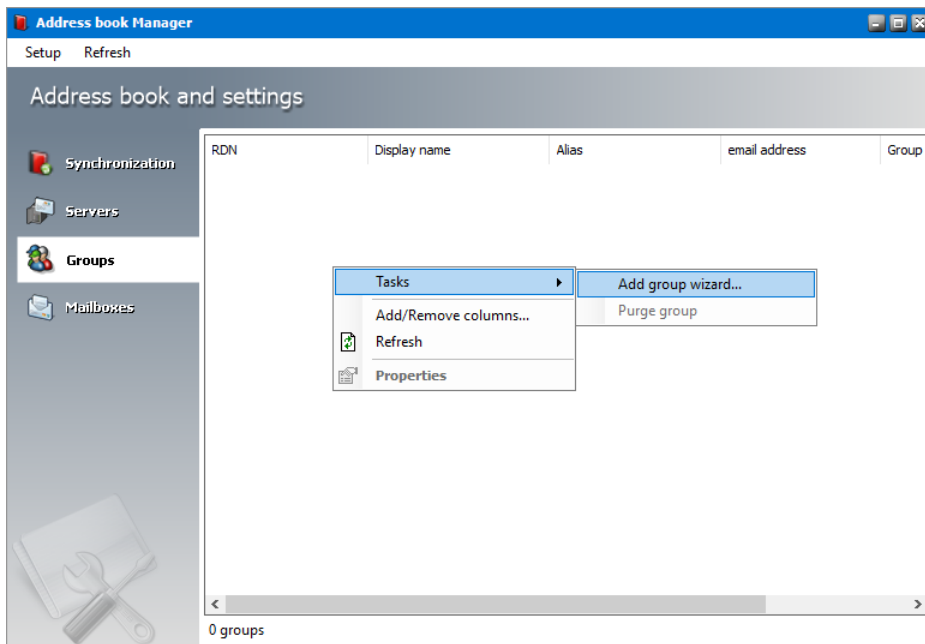
## Options for importing groups

Microsoft Exchange server groups can be added to the Address Book Manager in one of two ways:

- By using the Address Book Setup Wizard.
  1. Open the Address Book Manager.
  2. From the **Setup** menu, click **Setup Wizard**. The *Address book Setup wizard* opens.
  3. Click the **Launch group wizard** to initiate the import process.



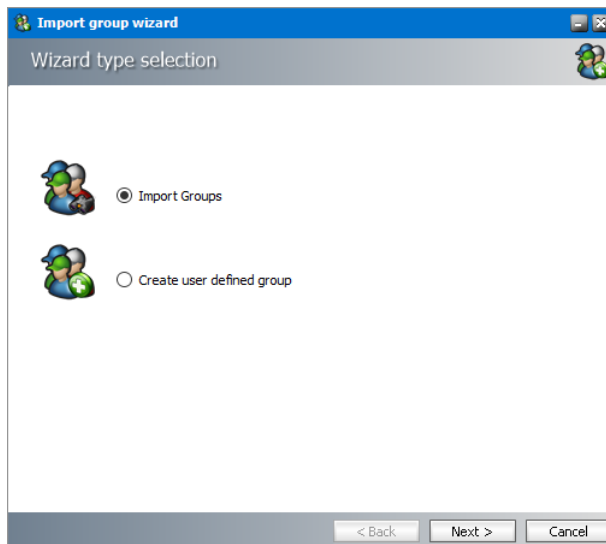
- By using the **Groups** tab of the **Address Book Manager**.
  1. Open the Address Book Manager.
  2. Click the **Groups** tab.
  3. Right-click inside the list view and from the context menu point to **Tasks** and select **Add group wizard...** to initiate the import process.



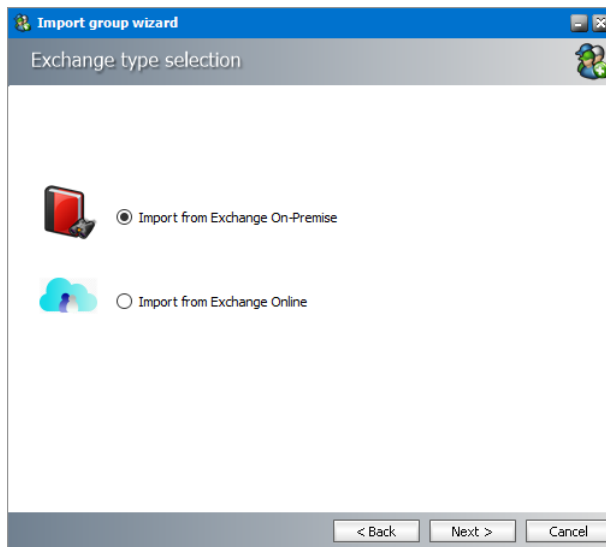
Whichever method you choose, the *Import group wizard* window opens.

## Steps to import groups from an on-premise Microsoft Exchange Server

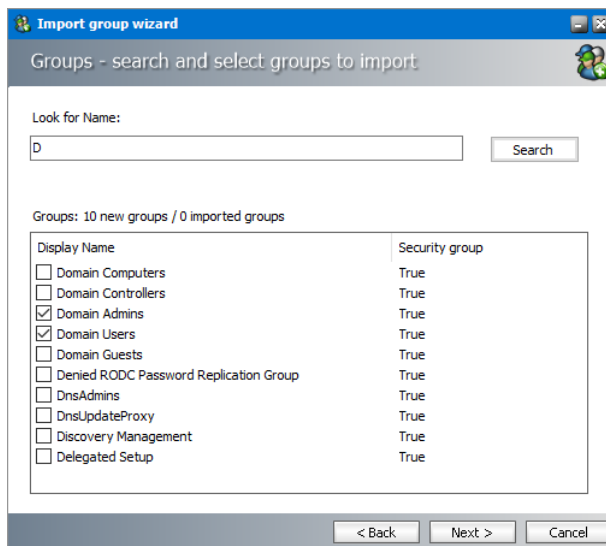
1. In the *Import group wizard* window, select **Import Groups**.



2. Click **Next**. The *Exchange type selection* window opens. Select **Import form Exchange On-Premise**.



3. Click **Next**. The *Groups - search and select groups to import* window opens.

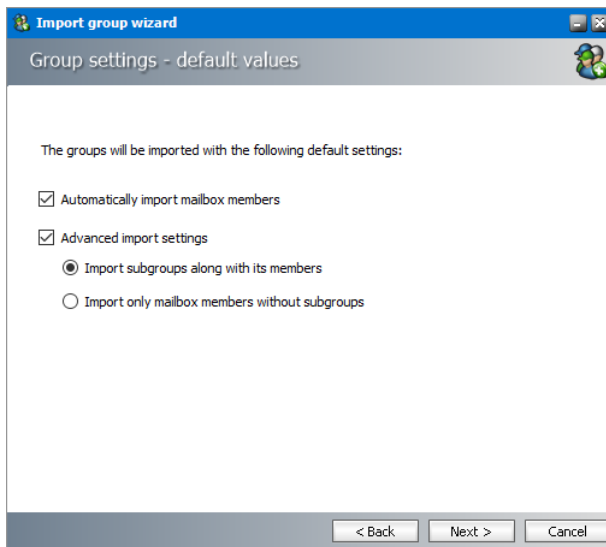


4. Click **Search** to return the list of all groups across all on-premise servers available to the Address Book Manager. To reduce the list of groups, you can specify a search term in the **Look for Name** search box. Only the initial letters of the groups **Display Name** can be specified, and wildcards are not supported. The search term is case-insensitive. For example, if you enter **D** as the search term and click **Search**, the groups that start with the letter **D** will be returned in the search results list.
5. Select one or more groups that you want to import.

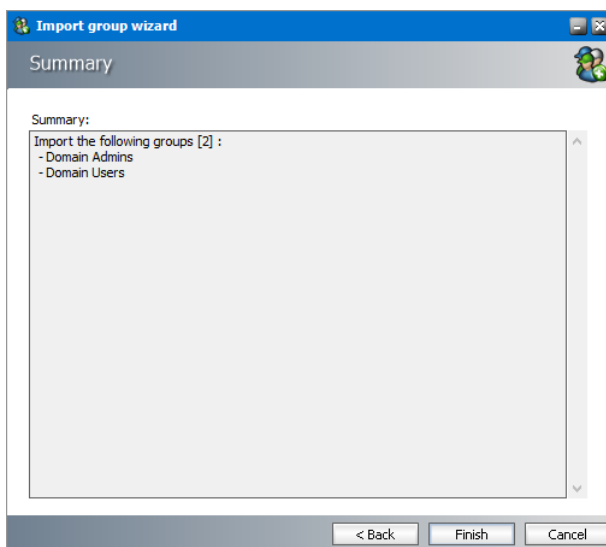
**i NOTE:** Groups that are highlighted indicate that they already exist in the Address Book Manager. The list summary above the list of groups will indicate how many groups that you select are new, and how many already exist. If you select pre-existing groups, all new mailboxes will also be imported.

6. Click **Next**. The *Group settings - default values* window opens.

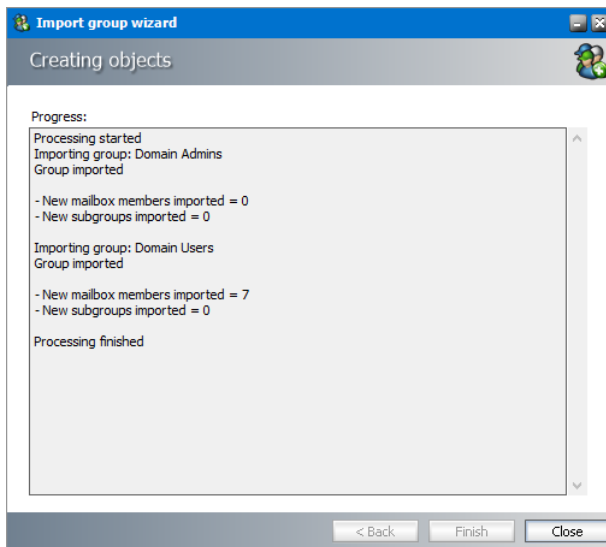




7. Specify the settings which will be applied when the groups are imported now or synchronized in future with the Address Book Manager automatically or manually. The settings are described below:
  - a. **Automatically import mailbox members** - check this box to import all Active Directory accounts with a mailbox that are members of this group.
  - b. **Advanced import settings** - check this box if you intend to import subgroups and subgroup mailbox members. You can enable this setting only if you select the **Automatically import mailbox members** setting.
  - c. **Import subgroups along with members** - check this box to import existing subgroups of selected groups including its member mailboxes. This is the default setting.
  - d. **Import only mailbox members without subgroups** - check this box to import only member mailboxes from subgroups. These mailboxes will be added to mailboxes in the parent group in the Address Book Manager.
8. Click **Next**. The *Summary* window opens that lists the groups that will be added.



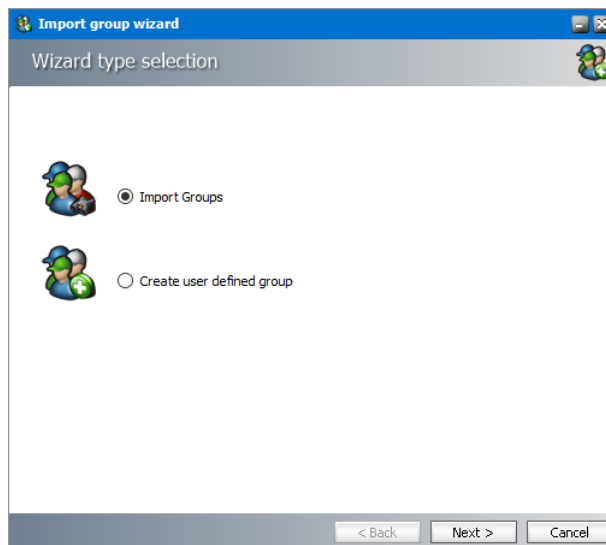
9. Click **Finish** to start the import process. The *Creating Object* window opens.



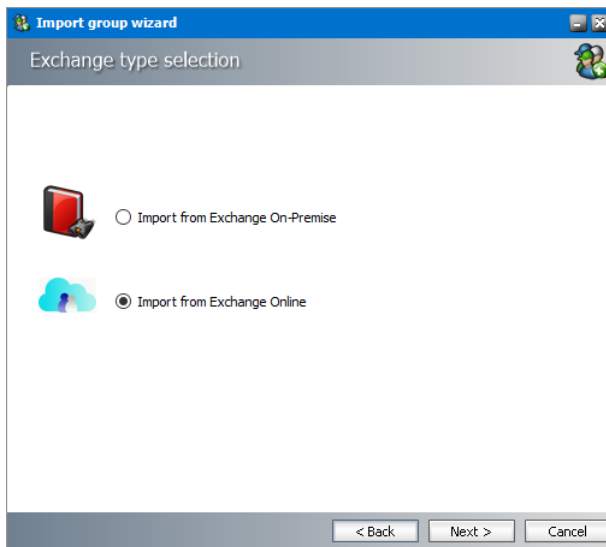
10. When the import process has completed, click **Close**.

## Steps to import groups from an online Microsoft Exchange Server

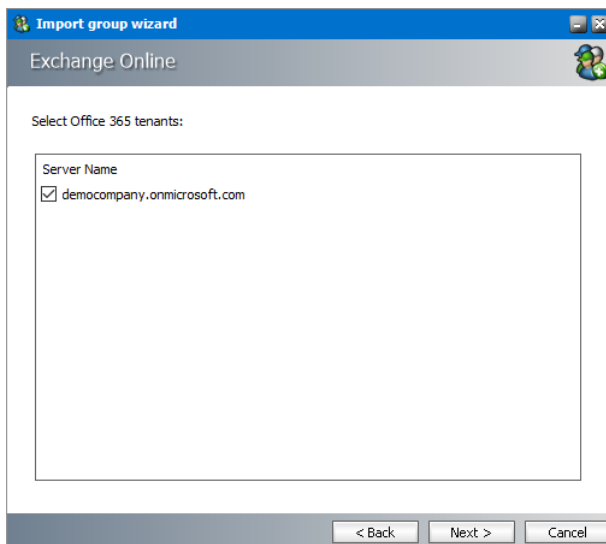
1. In the *Import group wizard* window, select **Import Groups**.



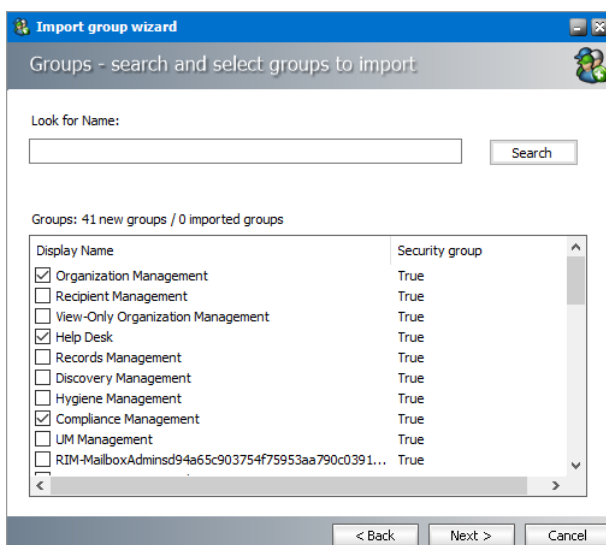
2. Click **Next**. In the *Exchange Type selection* window, select **Import from Exchange Online**.



3. Click **Next**. The *Exchange Online* window opens. Select the desired online Microsoft Exchange server.



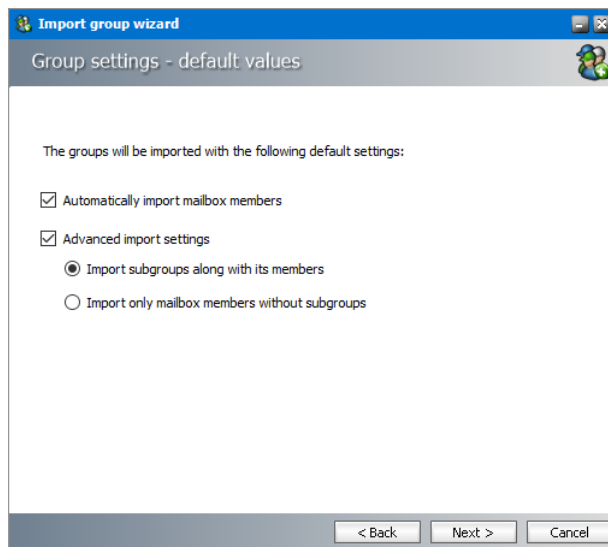
4. Click **Next**. The *Groups - search and select groups to import* window opens.



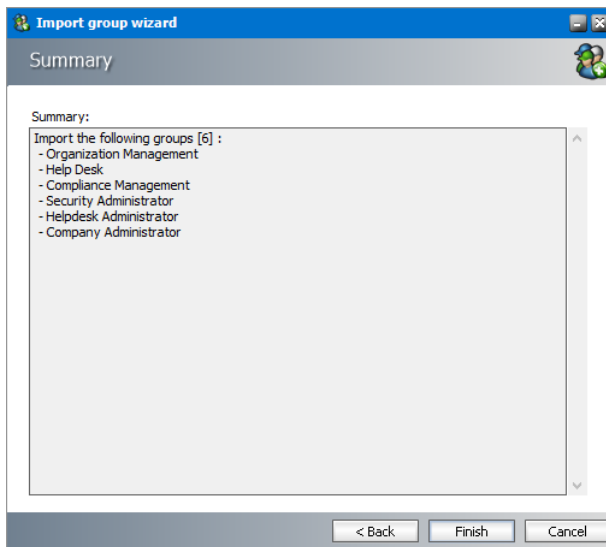
5. Click **Search** to return the list of all groups across all online servers available to the Address Book Manager. To reduce the list of groups, you can specify a search term in the **Look for Name** search box. Only the initial letters of the group **Display Name** can be specified and wildcards are not supported. The search term is case-insensitive.

**i** **NOTE:** Groups that are highlighted indicate that they already exist in the Address Book Manager. The list summary above the list of groups will indicate how many groups that you select are new, and how many already exist. If you select pre-existing groups, all new mailboxes in those groups will also be imported.

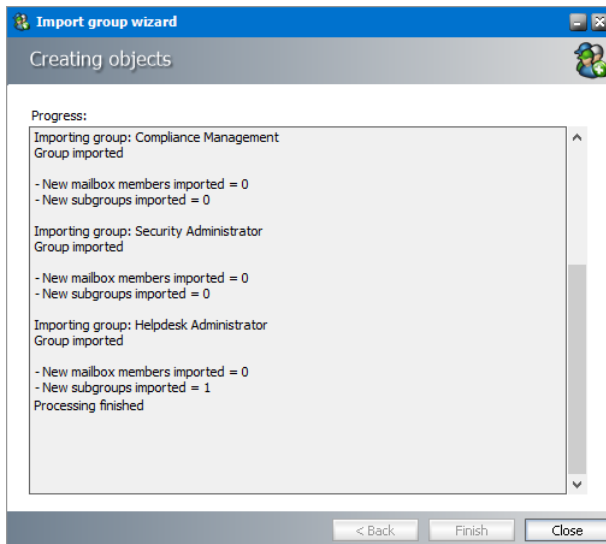
6. Select the groups that you want to import.
7. Click **Next**. The *Group settings - default values* window opens



8. Specify the settings which will be applied when the groups are imported now or synchronized in future with the Address Book Manager automatically or manually. The settings are described below:
  - a. **Automatically import mailbox members** - check this box to import all Active Directory accounts with a mailbox that are members of this group.
  - b. **Advanced import settings** - check this box if you intend to import subgroups and subgroup mailbox members. You can enable this setting only if you select the **Automatically import mailbox members** setting.
  - c. **Import subgroups along with members** - check this box to import existing subgroups of selected groups including its member mailboxes. This is the default setting.
  - d. **Import only mailbox members without subgroups** - check this box to import only member mailboxes from subgroups. These mailboxes will be added to mailboxes in the parent group in the Address Book Manager.
9. Click **Next**. The *Summary* window opens that lists the groups that will be added.



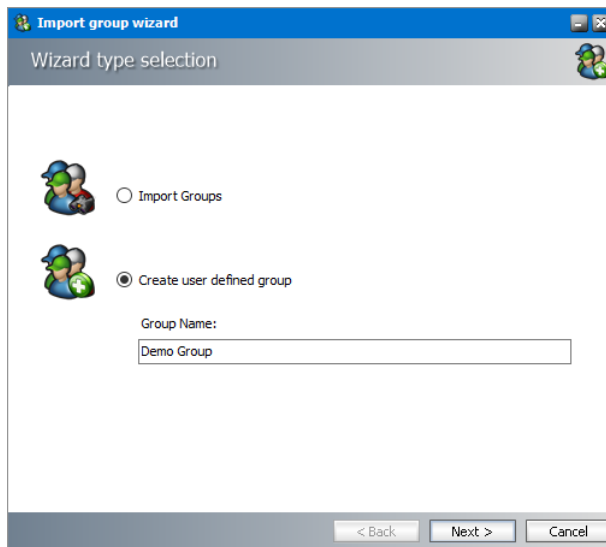
10. Click **Finish** to start the import process. The *Creating objects* window opens. You can click **Back** to select more groups to add or remove some of the selected groups.



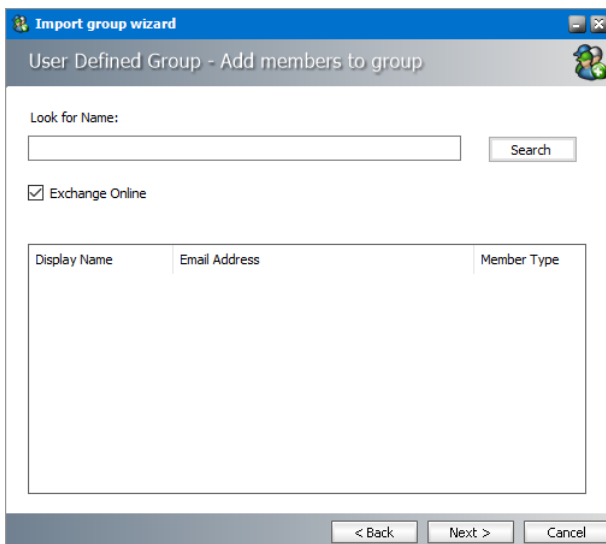
11. When the import process has completed, click **Close**.

## Steps to create user-defined groups

1. In the Import group wizard window, select **Create user defined group**. Enter a name for the group in the **Group Name** field.



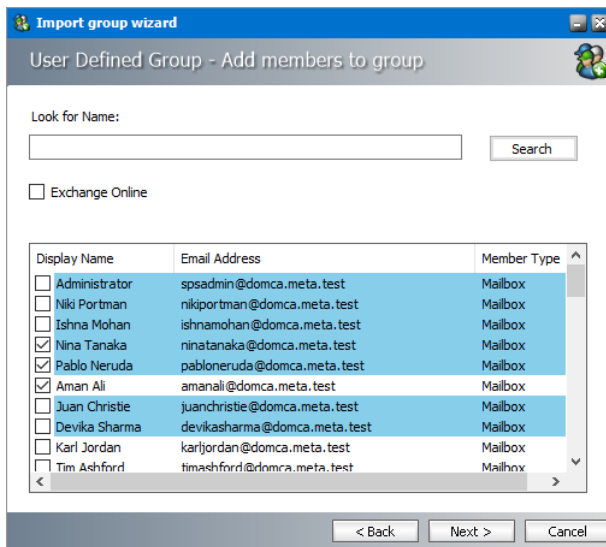
2. Click **Next**. The *User Defined Group - Add members to group* window opens. By default, the on-premise Microsoft Exchange server is the source for the list of mailboxes and groups that can be added to the user-defined group. To use O365 Exchange servers as a source for mailboxes and groups, select **Exchange Online**.



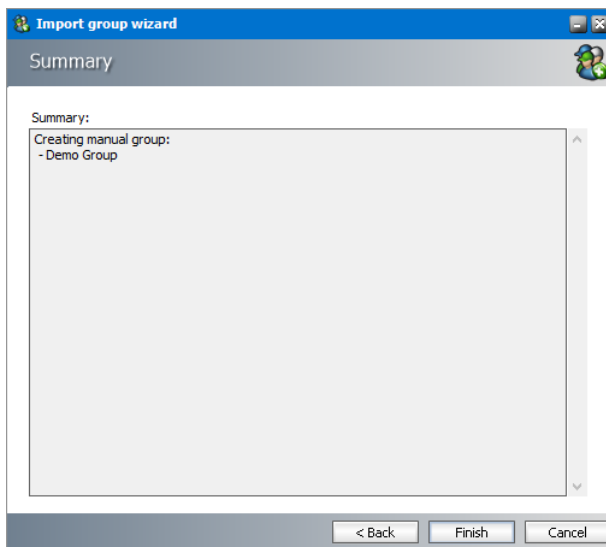
3. Click **Search** to return the list of all mailboxes and groups. To reduce the list of mailboxes and groups, you can specify a search term in the **Look for Name** search box. Only the initial letters of the mailbox or group **Display Name** can be specified and wildcards are not supported. The search term is case-insensitive.

**i NOTE:** If the **Exchange Online** check box is checked, only the online Microsoft Exchange servers will be used as the source. If the **Exchange Online** check box is unchecked, only on-premise Microsoft Exchange servers will be used as the source.

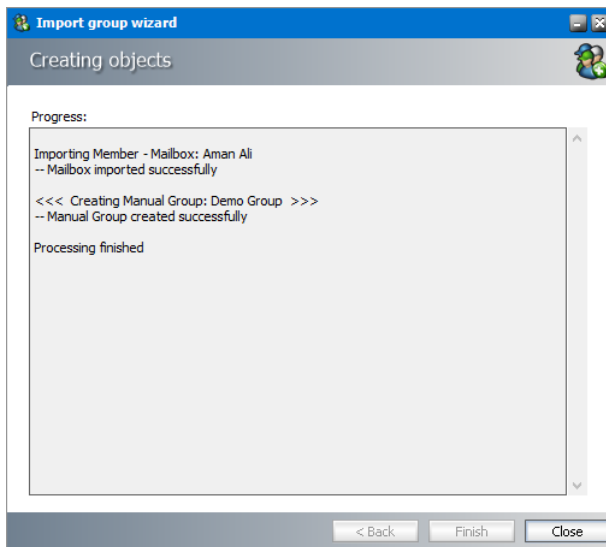
Mailboxes and groups that are highlighted indicate that they already exist in the Address Book Manager. The list summary above the list of groups will indicate how many mailboxes and groups are available.



4. Select one or more mailboxes and groups that want to add to the user-defined group. If you select one or more groups, all mailboxes in that group will also be add to the user-defined group during the import process.
5. Click **Next**. The *Summary* window opens that indicates the user-defined group that will be created.



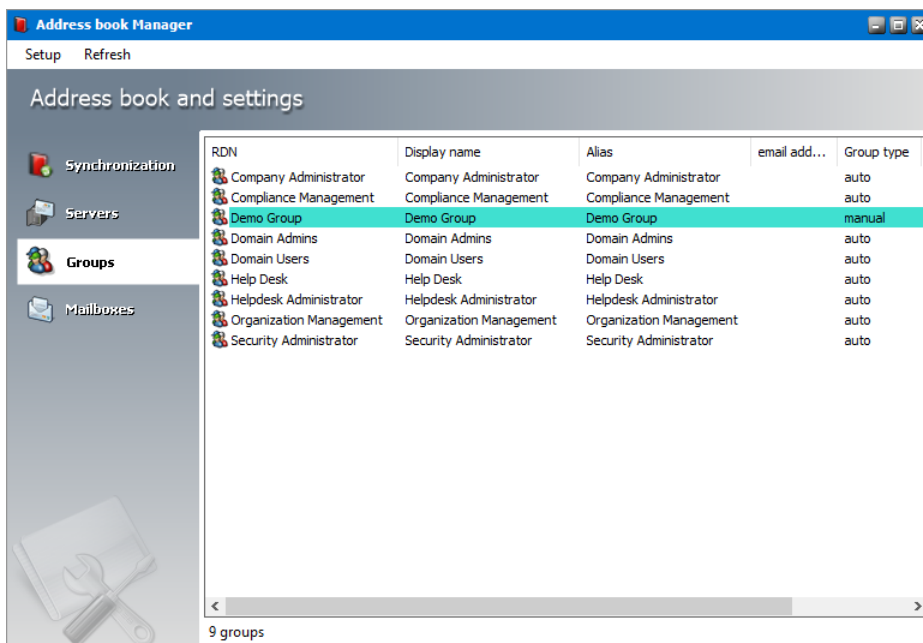
6. Click **Finish** to start the group creation process. The *Creating Object* window opens. You can click **Back** to revise your selection of mailboxes and groups.



7. When the import process has completed, click **Close**.

## Steps to verify the imported and user-defined groups

1. Open the Address Book Manager
2. Click the **Groups** tab and verify that the imported Active Directory and user-defined groups appear in the list view as expected. User-defined groups are highlighted in green.



3. Select a group and right-click to open the context menu. Click **Properties**. The *Properties* window of the selected group opens.
4. Click the **Members** tab and verify that the list of mailboxes were imported as expected.



# Synchronizing Address Book Manager


Synchronization with the Microsoft Exchange servers keeps groups and mailboxes up to date so that emails can be archived without problems. With the Address Book Manager, you can set up automatic synchronization schedules and initiate manual synchronization of various artifacts.

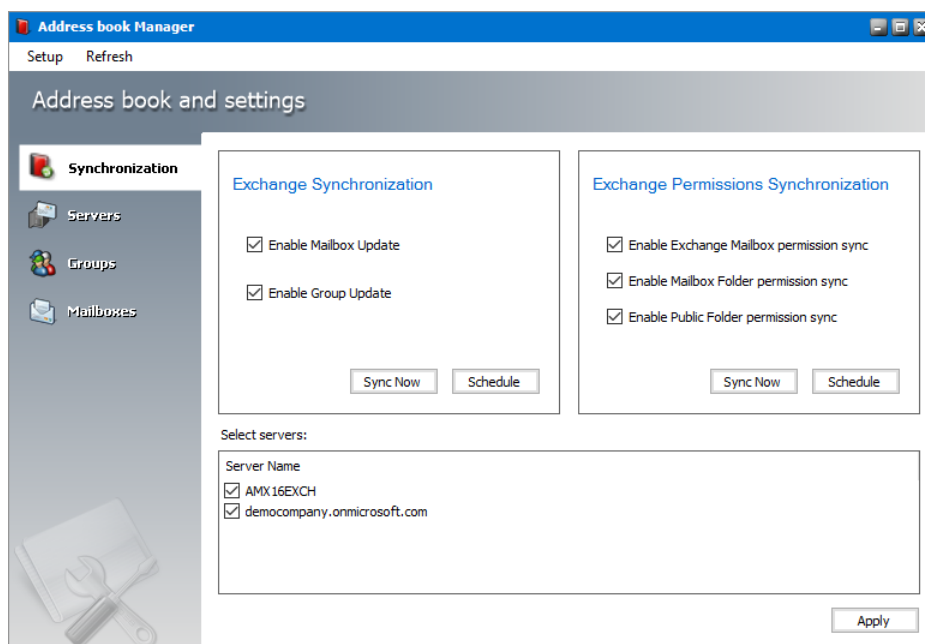
In this topic:

[Steps to perform a manual synchronization](#)

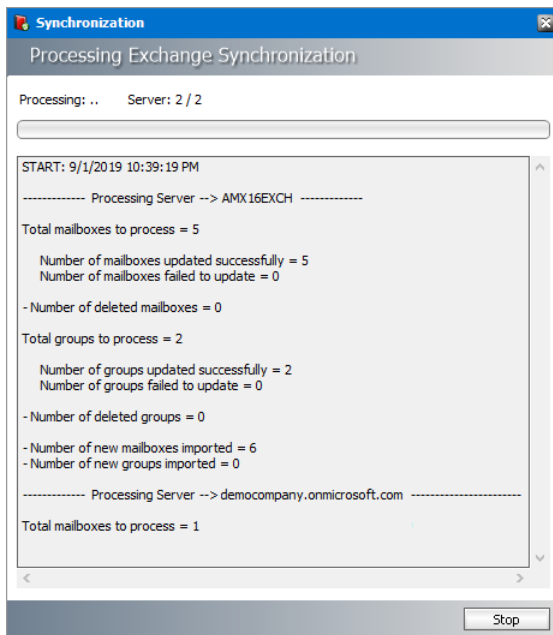
[Steps to schedule automatic synchronization](#)

## Steps to perform a manual synchronization

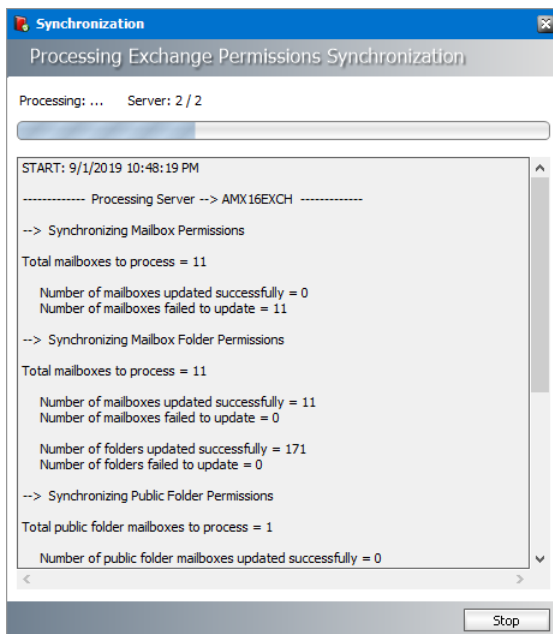
1. Open Address Book Manager by clicking the toolbar icon  or clicking **Address Book Manager** from the **Tools** menu.
2. The **Synchronization** tab opens by default.



3. Select the Microsoft Exchange mailboxes, groups and permissions that you want to synchronize.
4. In the **Select servers** box, select the Microsoft Exchange servers with which you want to synchronize the mailboxes, groups and permissions.
5. Click **Apply** to confirm the settings.
6. Click **Sync Now** in the *Microsoft Exchange Synchronization* box to manually initiate the synchronization of the mailboxes and groups with the selected Microsoft Exchange servers.




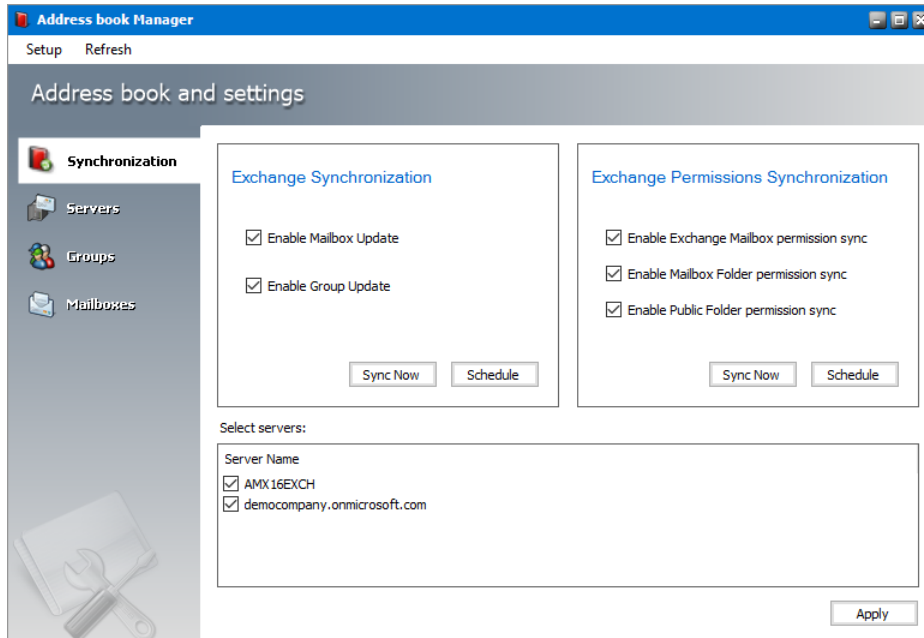
7. Click **Stop** to halt the synchronization process before it completes. When the process completes, click the **Close** button that opens. You can find the results of the synchronization process in a log file located at `C:\Program Files (x86)\Metalogix\MAM4Microsoft Exchange\Log\Synchronization_<timestamp>.log`
8. Click **Sync Now** in the *Microsoft Exchange Permissions Synchronization* box to manually initiate the synchronization of the mailboxes and groups with the selected Microsoft Exchange servers.



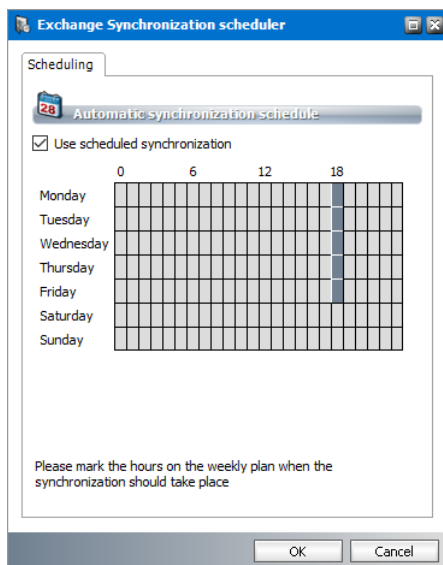
9. Click **Stop** to halt the synchronization process before it completes. When the process completes, click the **Close** button that opens. You can find the results of the synchronization process in a log file located at `C:\Program Files (x86)\Metalogix\MAM4Microsoft Exchange\Log\Synchronization_<timestamp>.log`

# Steps to schedule automatic synchronization

1. Open Address Book Manager by clicking the toolbar icon  or clicking **Address Book Manager** from the **Tools** menu.
2. The **Synchronization** tab opens by default.



3. Select the Microsoft Exchange mailboxes, groups and permissions that you want to synchronize.
4. In the **Select servers** box, select the Microsoft Exchange servers with which you want to synchronize the mailboxes, groups and permissions.
5. Click **Schedule** in the *Microsoft Exchange Synchronization* box. The *Microsoft Exchange Synchronization Scheduler* dialog opens.



6. Select **Use scheduled synchronization** to enable the synchronization calendar. Each row corresponds to a *day of the week*. Each column corresponds to an *hour of the day* (24-hour clock).
7. To set up a schedule using the synchronization calendar, click the cell that corresponds to the day of the week and the hour of day when you want the scheduler to initiate a synchronization job. For example, in the figure above, the synchronization schedule is set to start at 18:00 hrs (6 pm) every weekday. The time zone of the computer where the application is running will be used to determine the time.

**i** | **NOTE:** If you select consecutive cells in a single row, synchronization will start automatically every hour on the hour. It will consume unnecessary processing time and is not recommended.

8. Click **OK** to save the schedule or **Cancel** to discard the setup.
9. You can find the results of the scheduled synchronization process in a log file located at `C:\Program Files (x86)\Metalogix\MAM4Microsoft Exchange\Log\Synchronization_<timestamp>.log`

## Publish Archive Manager Forms

Archive Manager Forms are a set of custom Outlook forms that are used to display and work with archived emails. You can choose to publish these custom forms to the *Organizational Forms Library* of your on-premise Exchange Server, or publish these forms to the *Personal Forms Library* of each user whether they use an on-premise Exchange Server or the online Exchange server (O365).

This topic describes the steps to use the **Forms Installer** to publish the Archive Manager Forms directly to the *Organizational Forms Library* of your on-premise Exchange server, or prepare the the Archive Manager Forms for publishing to the *Personal Forms Library* of each on-premise or O365 user registered in the domain active directory using the Group Policy Object (GPO).

- [Publish Forms to Organizational Forms Library](#)
- [Publish Forms to Personal Forms Library](#)

## Publish Forms to Organizational Forms Library

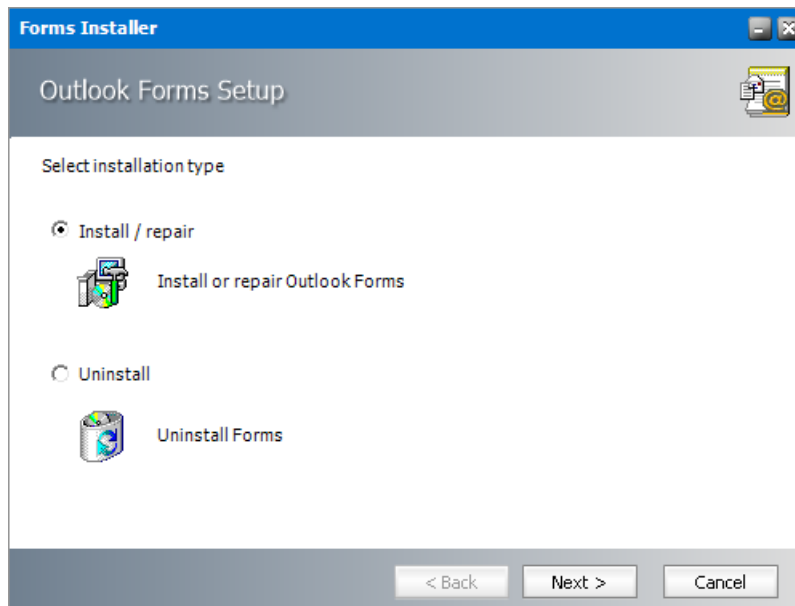
In this topic:

- [Steps to publish forms to the Organization Forms Library](#)
- [Steps to activate Archive Manager forms in mailboxes](#)

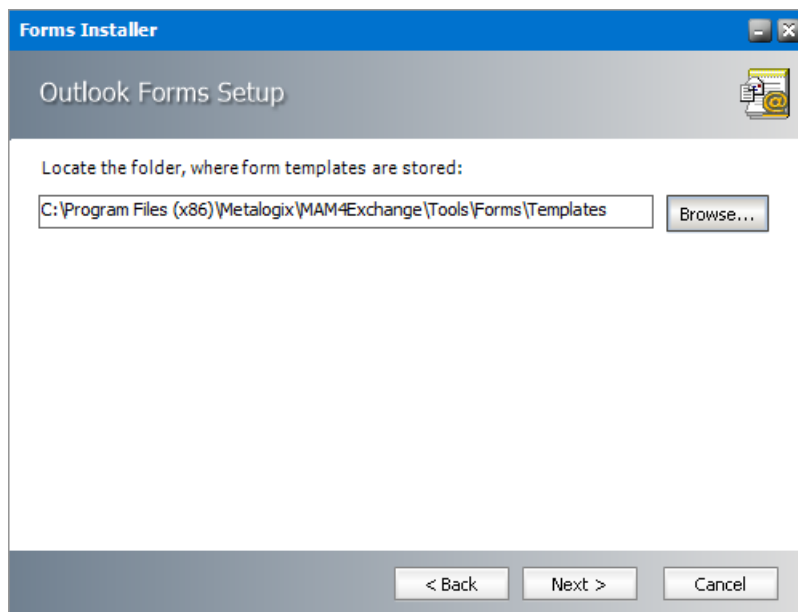
## Steps to publish forms to the Organization Forms Library

**i** | **NOTE:** It is assumed that the *Organizational Forms Library* exists on the on-premise Exchange Server. For more information see [Setup the Organizational Forms Library](#).

1. Log in to the server where Archive Manager for Exchange (designated the *Archive* server is a distributed deployment) was installed (eg. **AMXSERVER-A**) with the credentials of the superuser (eg. **democorp\mamadmin**)
2. To open the *Outlook Forms Setup* wizard do one of the following:
  - If the *Post installation Tasks* wizard is not already open, you can open the the *Post installation Tasks* wizard from `C:\Program Files (x86)\Metalogix\MAM4Exchange\Tools\LaunchTools\LaunchTools.exe` and then click **Start** next to step 2 to start the installer.
  - Start the forms installer directly from `C:\Program Files (x86)\Metalogix\MAM4Exchange\Tools\Forms\FormsInstaller.exe`.

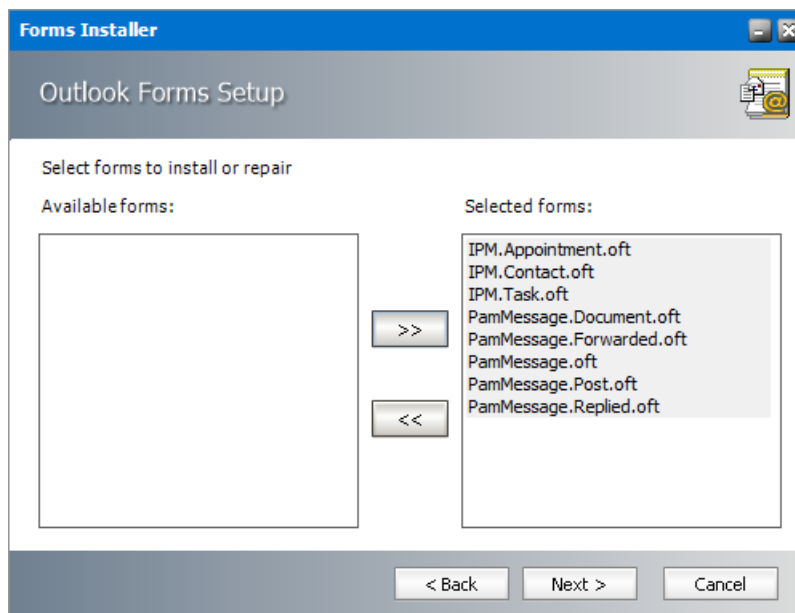


3. Select **Install/repair** and then click **Next**. The *Outlook Forms Setup - Folder Location* window for the form template opens.



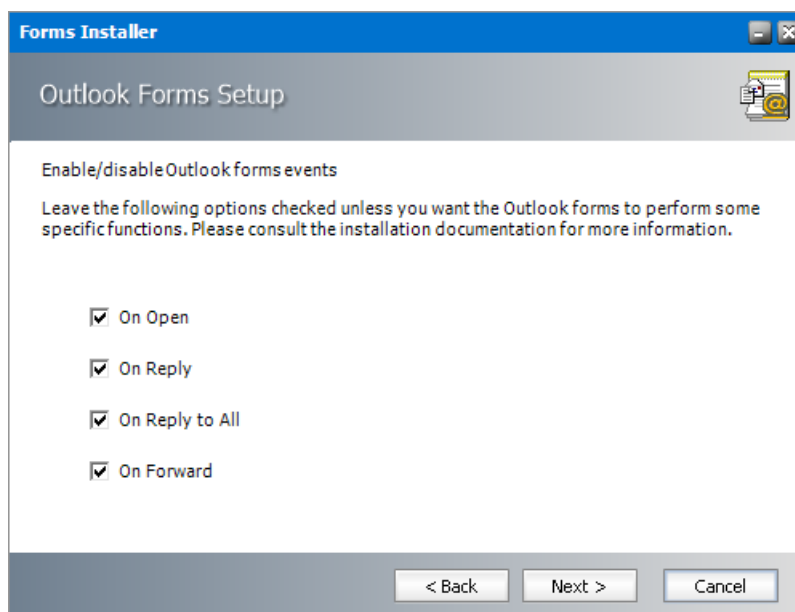
The default location is displayed. Click **Browse** to locate the template folder if you have moved the templates to a different location.

4. Click **Next**. The *Outlook Forms Setup - Form Selection* window open.



Select all the forms from the *Available forms* list and move it to the *Selected forms* list.

5. Click **Next**. The *Outlook Forms Setup - Enable/disable Outlook forms events* window opens.



Keep the default selections on this page unless you want to change the behavior as described below:

- a. **On Open** - When checked, this option presents a shortcut that can be clicked to download the archived email but disables the ability to use the *Previous Item* and *Next Item* functionality in Outlook because archived emails are offline copies and are not aware of previous or next emails. When unchecked, the archived email cannot be downloaded or viewed.

- b. **On Reply** - When checked, the content of the email is included in the reply to the sender of the original email. When unchecked, the shortcut to the archived email is included in the reply message and can be accessed only by members of the Exchange server.
  - c. **On Reply to All** - When checked, the content of the email is included in the reply to recipients of the original email. When unchecked, the shortcut to the archived email is included in the reply message and can be accessed only by members of the Exchange server.
  - d. **On Forward** - When checked, the content of the email is forwarded to the new recipient(s) of the original email. When unchecked, the shortcut to the archived email is forwarded to the new recipient and can be accessed only by members of the Exchange server.
6. Click **Next**. The *Outlook Forms Setup - Retrieve servers* identification window opens.

Please define a primary and secondary Retrieve Server name for each location in your organization. If you have only one Archive Server, you can provide an alternative name for the same server. If you have a dedicated Retrieve Server in the organization, please make sure that this server is entered as the Primary Retrieve Server. The Secondary Retrieve Server is used only if the primary is not available.

Retrieve Servers		
Location ID	Primary Retrieve Server	Secondary Retrieve Server
1	AMXSERVER-R	AMXSERVER-A
*		

< Back    Next >    Cancel

Specify the information as described below:

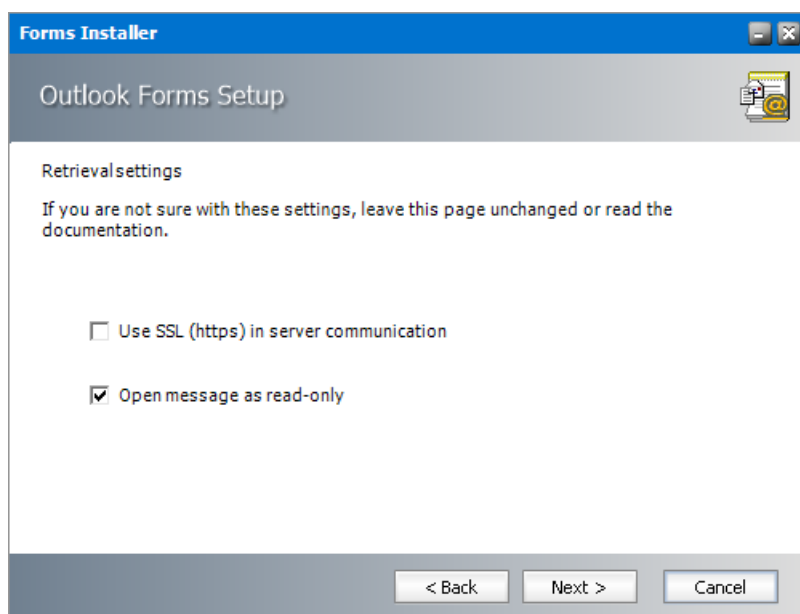
- a. **Location ID** - Each Archive Manager for Exchange server is bound to a single location identified by the Location Id.
- b. **Primary Retrieve Server** - If the deployment topology has just one standalone Archive Manager for Exchange server then enter the NetBIOS name of the standalone server. If the deployment topology has a dedicated Archive Manager for Exchange server with the *Retrieve* role, then specify the NetBIOS name of the Retrieve server (eg. **AMXSERVER-R**).
- c. **Secondary Retrieve Server** - For a standalone deployment topology, enter an alternate identifier (eg. IP address) of the same server. For a dedicated *Retrieve* server specify the NetBIOS name of the Archive server.



Examples:

Topology	Primary Retrieve Server	Secondary Retrieve Server
Standalone Archive server	NetBIOS name of the Archive server (eg. AMXSERVER)	IP address of the Archive server (eg. 10.20.30.40)
Dedicated Archive and Retrieve servers	NetBIOS name of the <i>Retrieve</i> server (eg. AMXSERVER-R)	NetBIOS name of the <i>Archive</i> server (eg. AMXSERVER-A)
Load-balanced Retrieve servers	NetBIOS name of the load balancer	IP Address of the load balancer

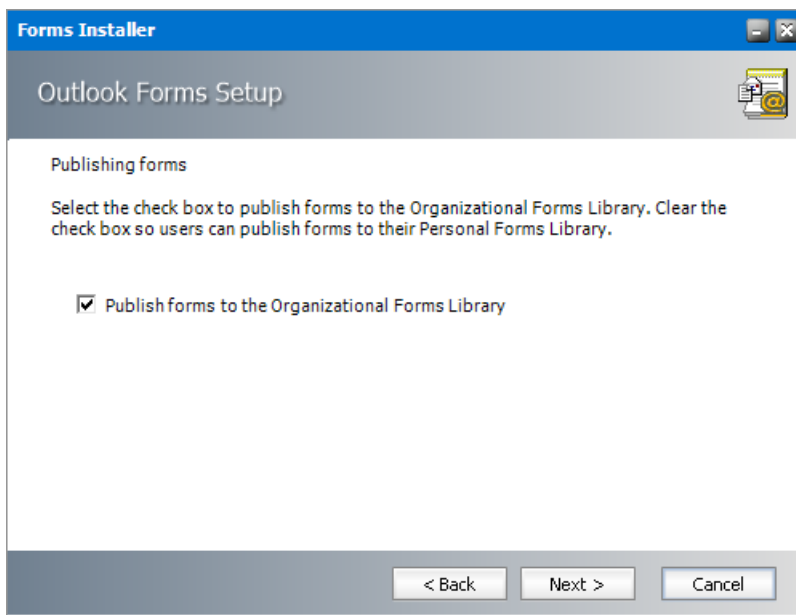
7. Click **Next**. The *Outlook Forms Setup - Retrieval settings* window opens.



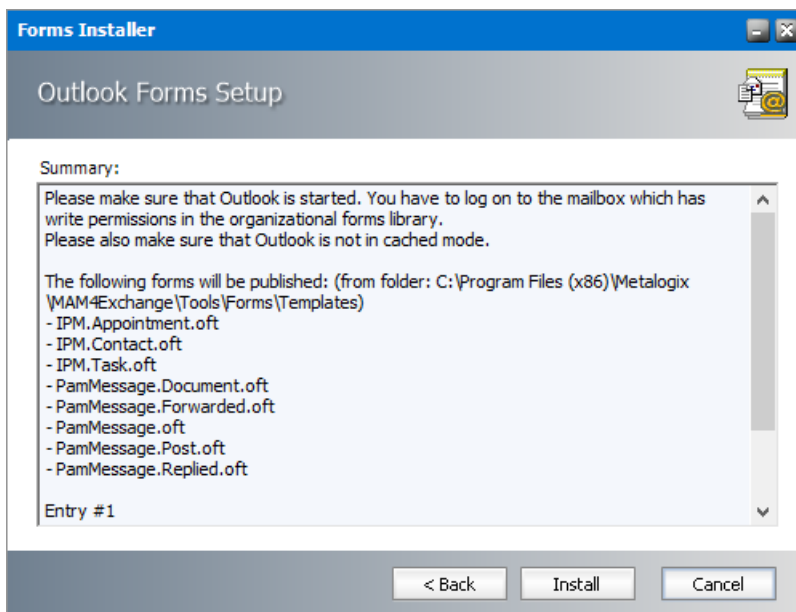
The options are as described below:

- a. **Use SSL (https) in server connection** - Select this option only if the Exchange server communication uses SSL.
- b. **Open message as read-only** - When checked, archived emails are opened in read-only mode. When this option is unchecked, users are allowed to modify archived emails but these changes are not updated in the archive. Users with *Archive Manager Outlook Addin* installed can modify archived emails by creating new email versions in the archive even if the **Open message as read-only** check box is selected.

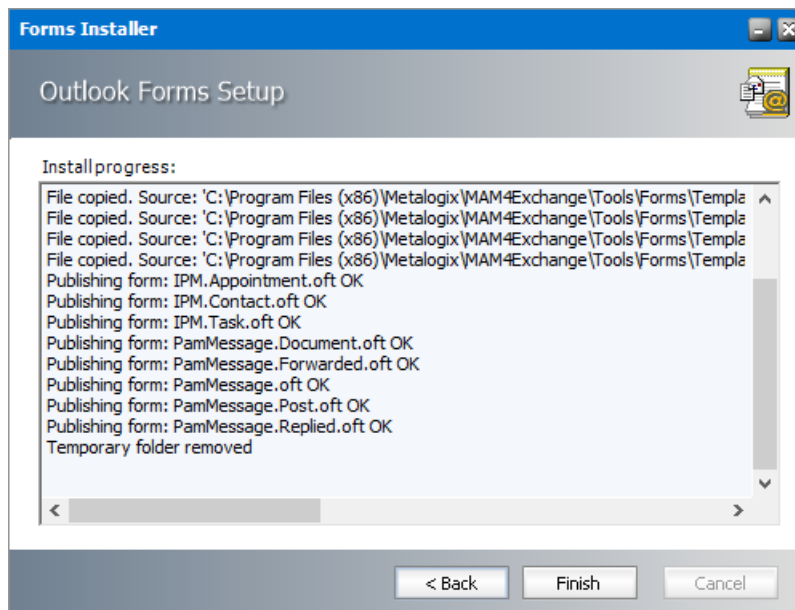
8. Click **Next**. The *Outlook Forms Setup - Publishing forms* window opens.



9. Click **Next**. The *Outlook Forms Setup - Summary* window opens.

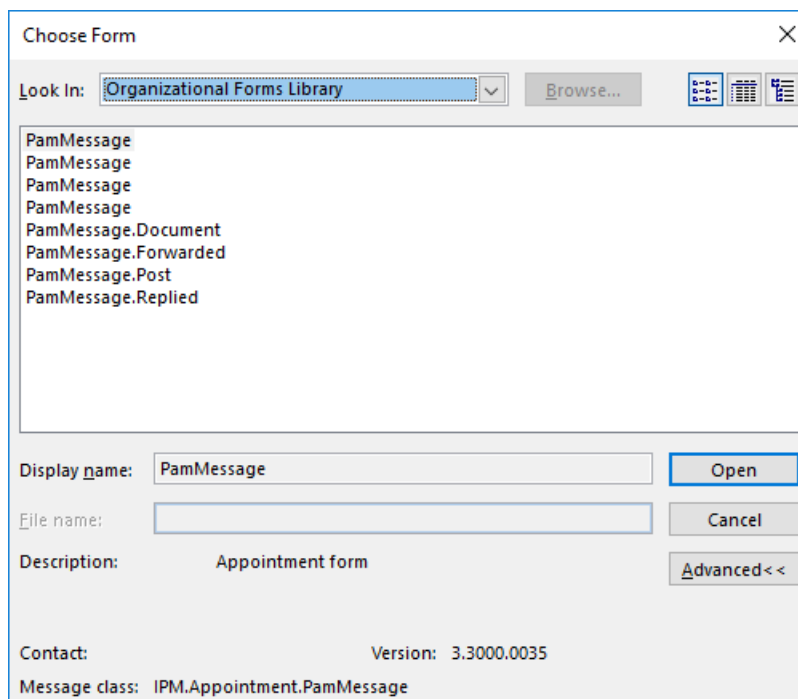


10. Verify the settings or click **Back** to revise the settings. Click **Install** to publish the forms. The *Outlook Forms Setup - Install progress* window opens.



When the forms are published click **Finish**.

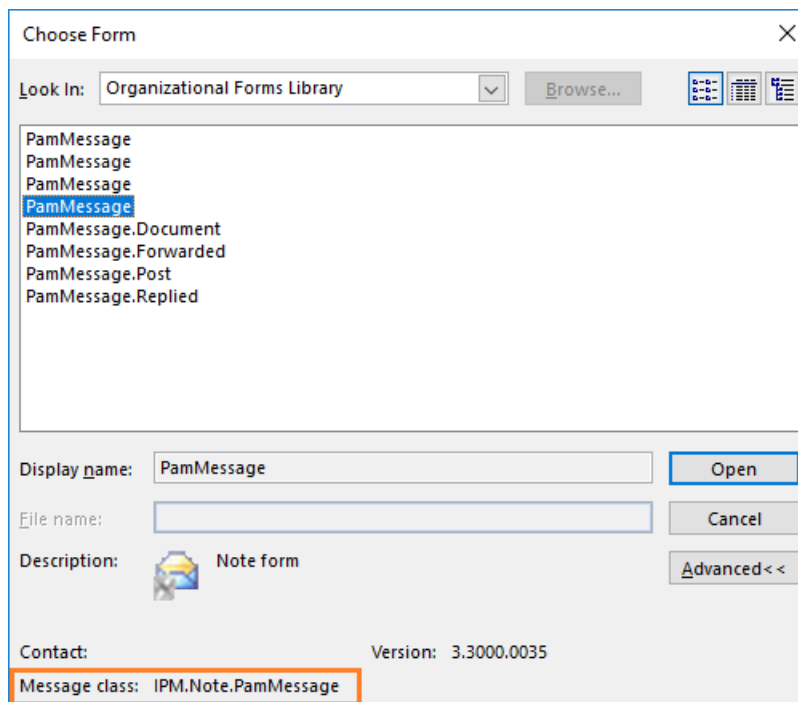
11. To verify that the forms were published to the *Organizational Forms Library* in the Exchange server, open an Outlook client account connected to the Exchange server. From the **Home** tab click **New Items > More Items > Choose Form**. In the **Look In** list, click *Organizational Forms Library* and view the published forms.



## Steps to activate Archive Manager forms in mailboxes

After publishing the forms, it is recommended to activate any one Archive Manager form for all users to ensure that the forms are immediately available to the users.

1. Open **Outlook** on the Archive Manager server with your administrator or super-user credentials.
2. Click the **Home** tab and navigate to **New Items > More Items > Choose Form**.
3. Choose **Organizational Forms Library** from the **Look in** drop down.
4. Select the **PamMessage** form that has the archived email icon in the **Description** (to display the icon click **Advanced**)



5. Click and hold the **SHIFT-key** and double-click to load the form. The form opens like a normal email.
6. Send this email to all mailboxes you plan to archive. When users receive the email, the new set of custom forms in the *Organizational Forms Library* will be available to the users.

### **i** NOTE:

- a. If there are multiple languages (multiple organizational form libraries), then you need to publish the forms using a language specific Outlook and account – one for each language.
- b. To replicate the Archive Manager forms in the Public Information Store, use an Archive Manager form to send an email to your **Inbox** folder. Then copy or move the email to the Public Folder you wish to archive. The Archive Manager forms are replicated in the Public Information Store too.

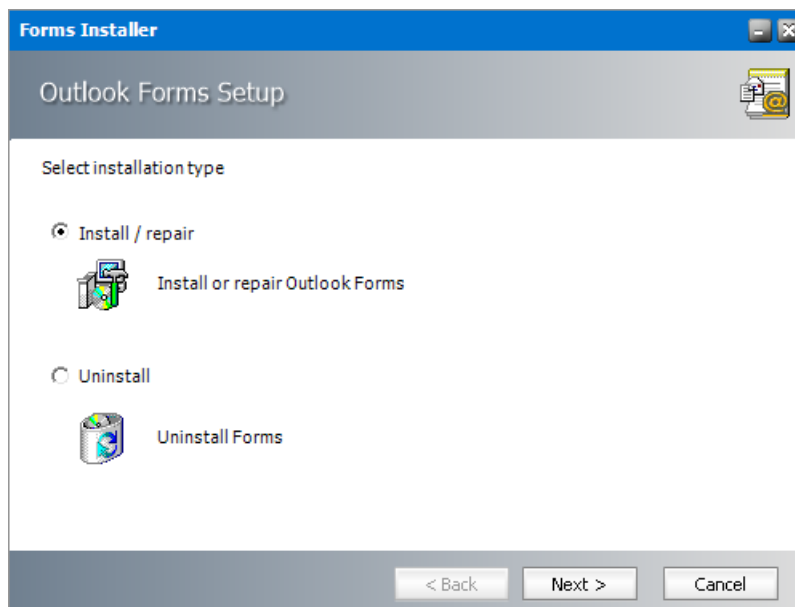
# Publish Forms to Personal Forms Library

In this topic:

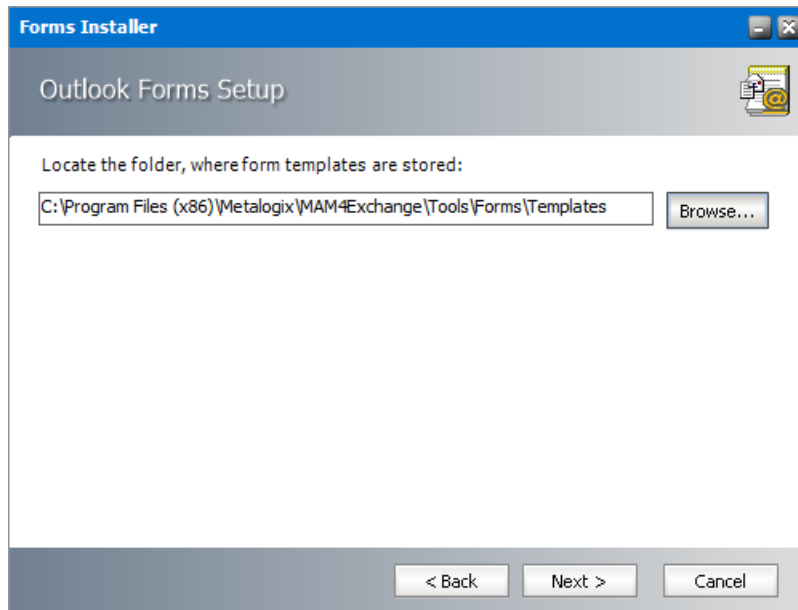
- [Steps to prepare forms for publishing](#)
- [Steps to install the Forms Publisher to publish forms](#)
- [Steps to use the Forms Publisher to publish forms](#)
- [Steps to use the Group Policy Object \(GPO\) to publish forms](#)

## Steps to prepare forms for publishing

1. Log in to the server where Archive Manager for Exchange (designated the *Archive* server is a distributed deployment) was installed (eg. **AMXSERVER-A**) with the credentials of the superuser (eg. **democorp\mamadmin**)
2. To open the *Outlook Forms Setup* wizard do one of the following:
  - If the *Post installation Tasks* wizard is not already open, you can open the the *Post installation Tasks* wizard from `C:\Program Files (x86)\Metalogix\MAM4Exchange\Tools\LaunchTools\LaunchTools.exe` and then click **Start** next to step 2 to start the installer.
  - Start the forms installer directly from `C:\Program Files (x86)\Metalogix\MAM4Exchange\Tools\Forms\FormsInstaller.exe`.

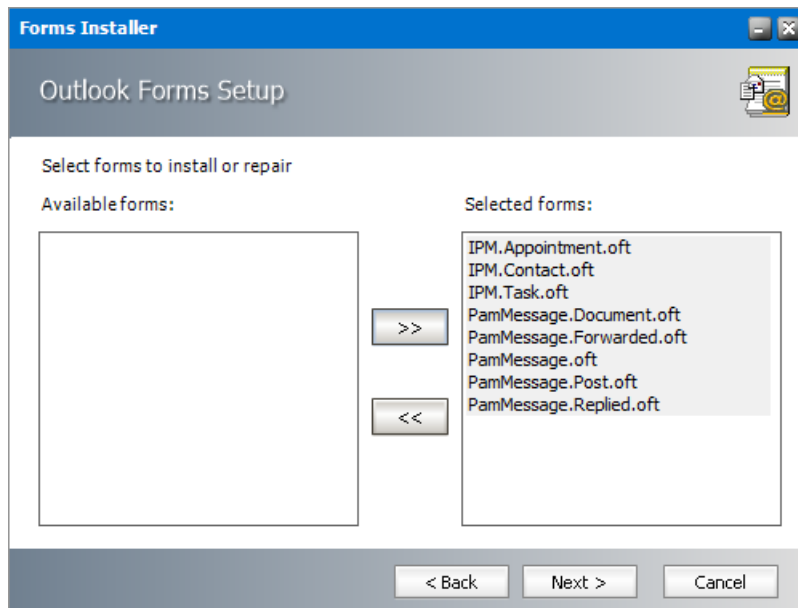


3. Select **Install/repair** and then click **Next**. The *Outlook Forms Setup - Folder Location* window opens.



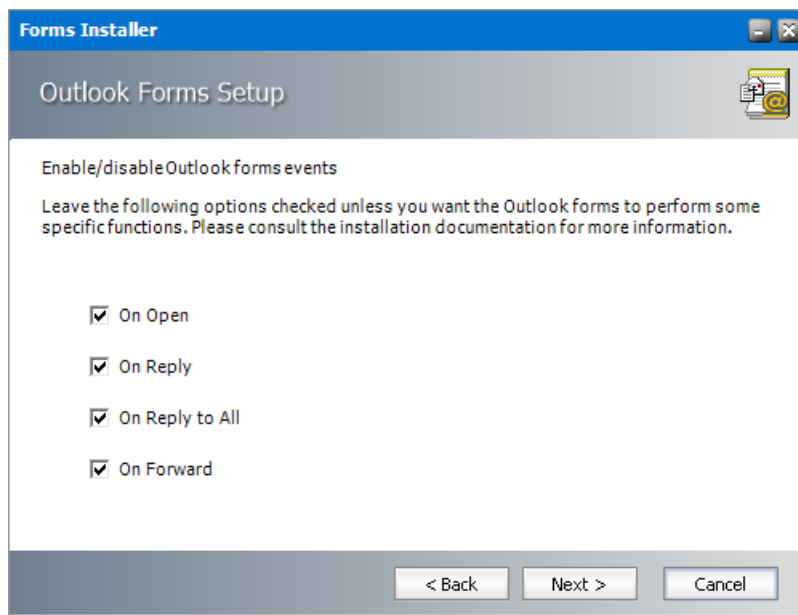
The default location is displayed. Click **Browse** to locate the template folder if you have moved the templates to a different location

4. Click **Next**. The *Outlook Forms Setup - Form Selection* window opens.



Select all the forms from the *Available forms* list and move it to the *Selected forms* list.

5. Click **Next**. The *Outlook Forms Setup - Enable/disable Outlook forms events* window opens.



Keep the default selections on this page unless you want to change the behavior as described below:

- a. **On Open** - When checked, this option presents a shortcut that can be clicked to download the archived email but disables the ability to use the *Previous Item* and *Next Item* functionality in Outlook because archived emails are offline copies and are not aware of previous or next emails. When unchecked, the archived email cannot be downloaded or viewed.
- b. **On Reply** - When checked, the content of the email is included in the reply to the sender of the original email. When unchecked, the shortcut to the archived email is included in the reply message and can be accessed only by members of the Exchange server.
- c. **On Reply to All** - When checked, the content of the email is included in the reply to recipients of the original email. When unchecked, the shortcut to the archived email is included in the reply message and can be accessed only by members of the Exchange server.
- d. **On Forward** - When checked, the content of the email is forwarded to the new recipient(s) of the original email. When unchecked, the shortcut to the archived email is forwarded to the new recipient and can be accessed only by members of the Exchange server.

6. Click **Next**. The *Outlook Forms Setup - Retrieve servers* identification window opens.

Please define a primary and secondary Retrieve Server name for each location in your organization. If you have only one Archive Server, you can provide an alternative name for the same server. If you have a dedicated Retrieve Server in the organization, please make sure that this server is entered as the Primary Retrieve Server. The Secondary Retrieve Server is used only if the primary is not available.

Location ID	Primary Retrieve Server	Secondary Retrieve Server
1	AMXSERVER-R	AMXSERVER-A

< Back    Next >    Cancel

Specify the information as described below:

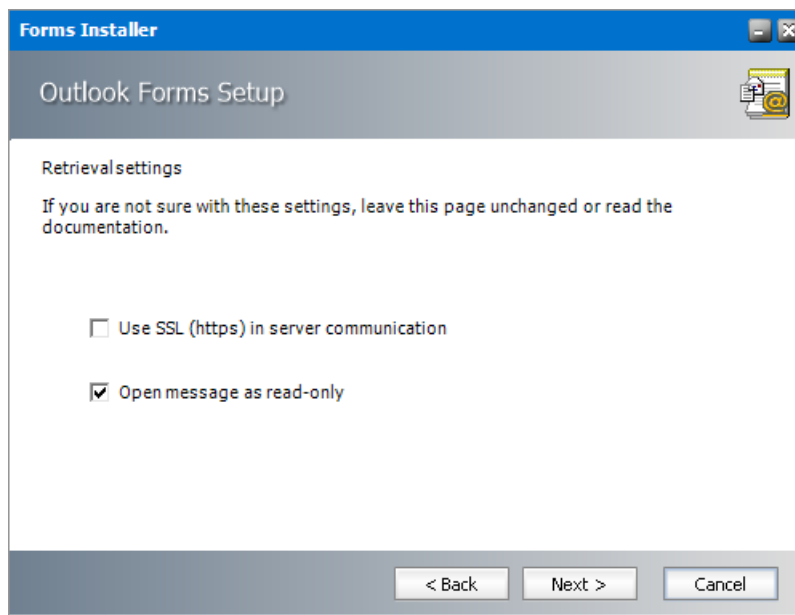
- a. **Location ID** - Each Archive Manager for Exchange server is bound to a single location identified by the Location Id.
- b. **Primary Retrieve Server** - If the deployment topology has just one standalone Archive Manager for Exchange server then enter the NetBIOS name of the standalone server. If the deployment topology has a dedicated Archive Manager for Exchange server with the *Retrieve* role, then specify the NetBIOS name of the *Retrieve* server (eg. **AMXSERVER-R**).
- c. **Secondary Retrieve Server** - For a standalone deployment topology, enter the same NetBIOS name or IP address of the standalone Archive server. If the deployment topology has a dedicated Archive Manager for Exchange server with the *Archive* role then specify the NetBIOS name of the *Archive* server.

Examples:

Topology	Primary Retrieve Server	Secondary Retrieve Server
Standalone Archive server	NetBIOS name or IP address of the Archive server (eg. AMXSERVER)	NetBIOS name or IP address of the Archive server (eg. AMXSERVER)
Dedicated Archive and Retrieve servers	NetBIOS name or IP address of the <i>Retrieve</i> server (eg. AMXSERVER-R)	NetBIOS name or IP address of the <i>Archive</i> server (eg. AMXSERVER-A)
Load-balanced Retrieve servers	NetBIOS name or IP address of the load balancer	NetBIOS name or IP Address of the load balancer

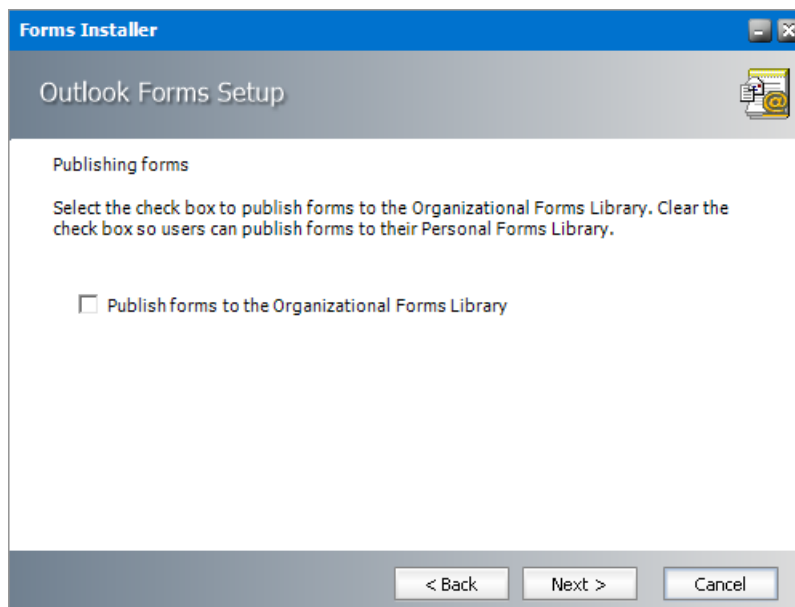


7. Click **Next**. The *Outlook Forms Setup - Retrieval settings* window opens.

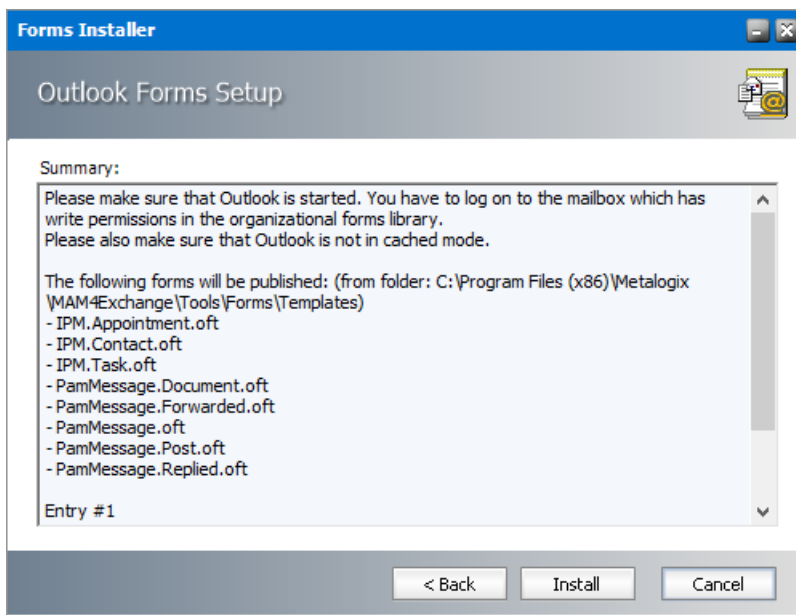


The options are as described below:

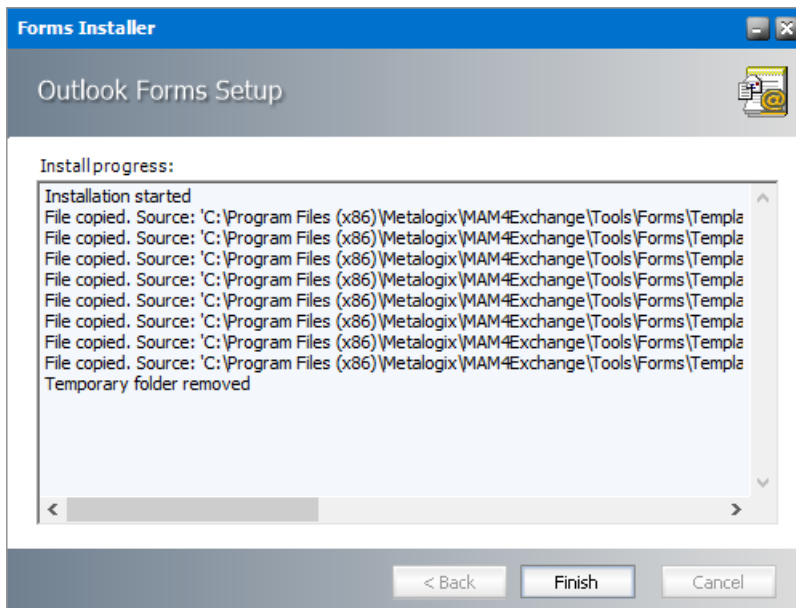
- a. **Use SSL (https) in server connection** - Select this option only if the Exchange server communication uses SSL.
  - b. **Open message as read-only** - When checked, archived emails are opened in read-only mode. When this option is unchecked, users are allowed to modify archived emails but these changes are not updated in the archive. Users with *Archive Manager Outlook Addin* installed can modify archived emails by creating new email versions in the archive even if the **Open message as read-only** check box is selected.
8. Click **Next**. The *Outlook Forms Setup - Publishing forms* window opens. Clear the checkbox **Publishing forms to the Organizational Forms Library**.



9. Click **Next**. The *Outlook Forms Setup - Summary* window opens.



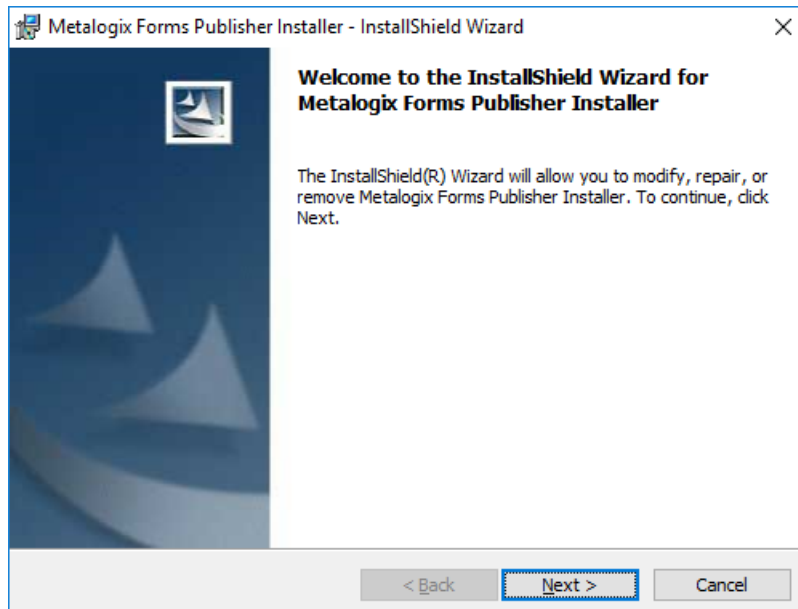
10. Click **Install** to prepare the forms for publishing. The *Outlook Forms Setup - Install progress* window opens.



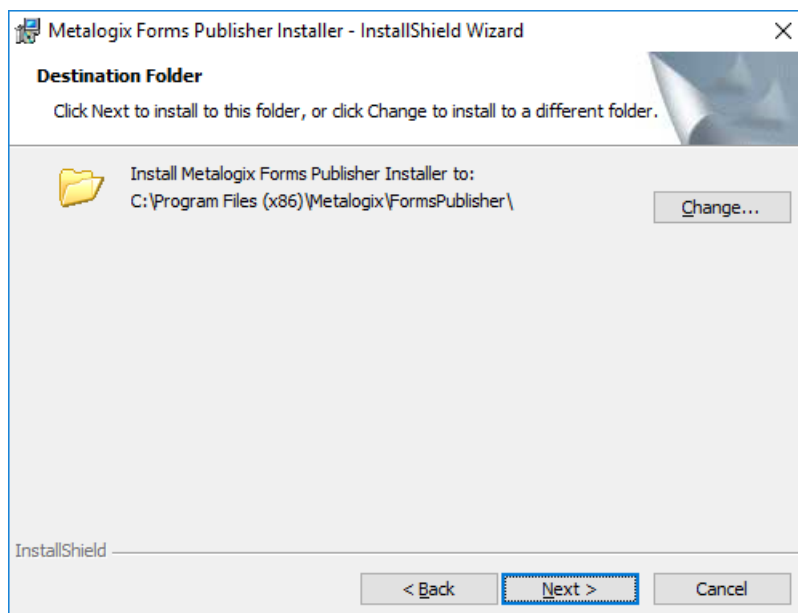
11. When the forms are prepared for publishing click **Finish**. When you complete this step, the Archive Manager forms are ready to be published to the *Personal Forms Library*.

## Steps to install the Forms Publisher to publish forms

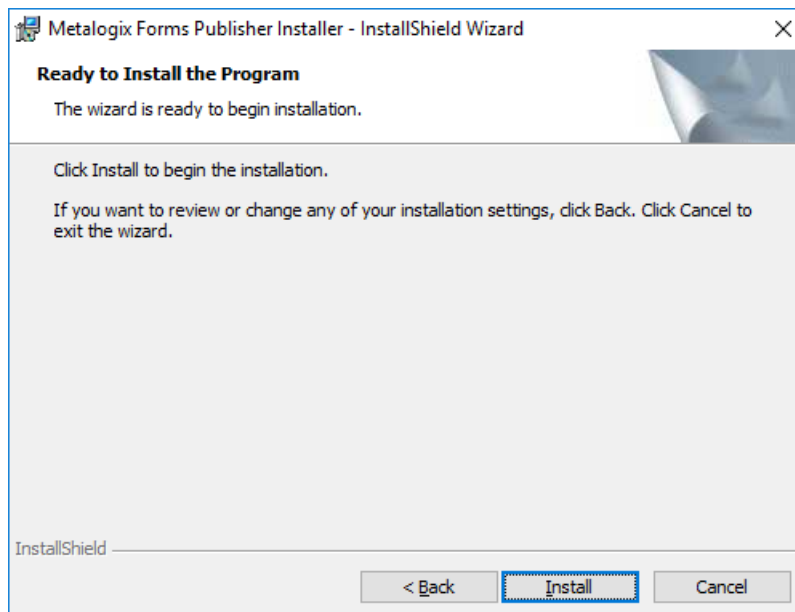
1. Open <Media-folder>\Archive Manager Installation Package\Exchange\Addin and run the **Archive Manager Forms Publisher Setup.msi** installer.



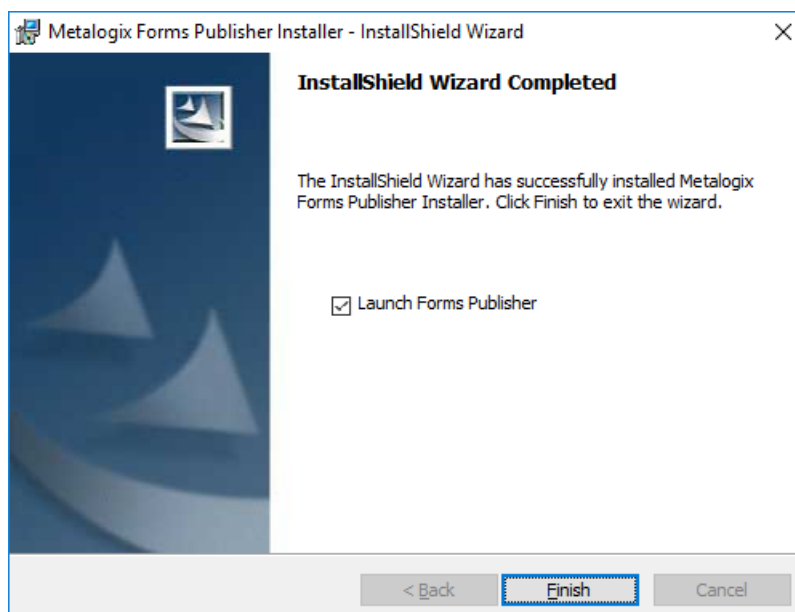
2. Click **Next**. The *Destination Folder* window opens.



3. Click **Change** to revise the location of the installation folder, or click **Next** to continue. The **Ready to Install the Program** window opens.



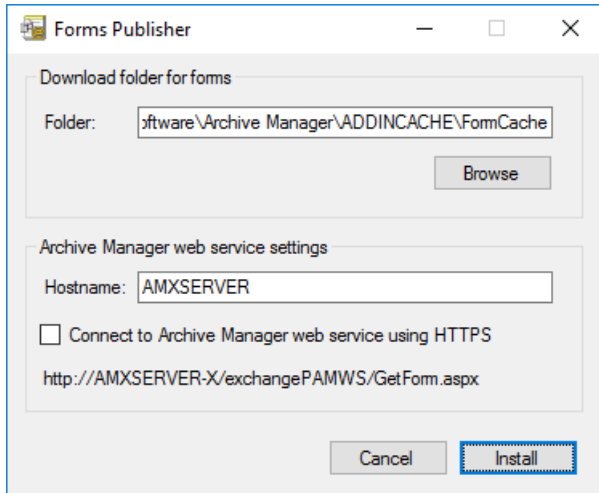
4. Click **Install**. When the installation completes, the *InstallShield Wizard Completed* window opens.



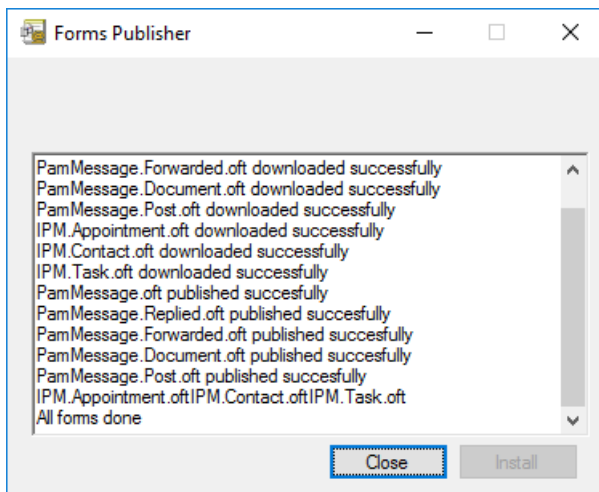
If you wish to publish the forms to the Personal Forms Library immediately, select the checkbox **Launch Forms Publisher** and click **Finish**. Then follow the steps in the next section to publish the forms. If you clear the checkbox, you can start the *Form Publisher* form the *Start menu > Metalogix > Form Publisher*.

## Steps to use the Forms Publisher to publish forms

1. If the Forms Publisher is not already opened, start the *Form Publisher* from the *Start menu > Metalogix > Form Publisher*. The *Forms Publisher* window opens.



2. Click **Install** to publish the forms to the *Personal Forms Library*.



3. Click **Close** to exit the *Forms Publisher*.
4. Verify that the custom forms are present in the *Personal Forms Library*.

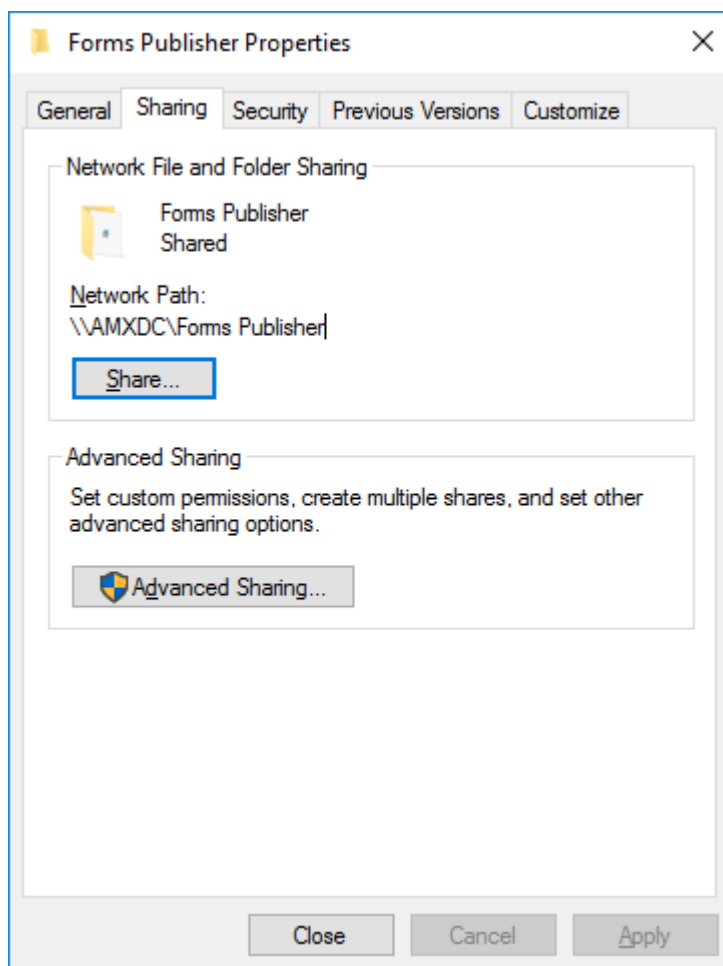
## Steps to use the Group Policy Object (GPO) to publish forms

The steps to set up the GPO has three stages:

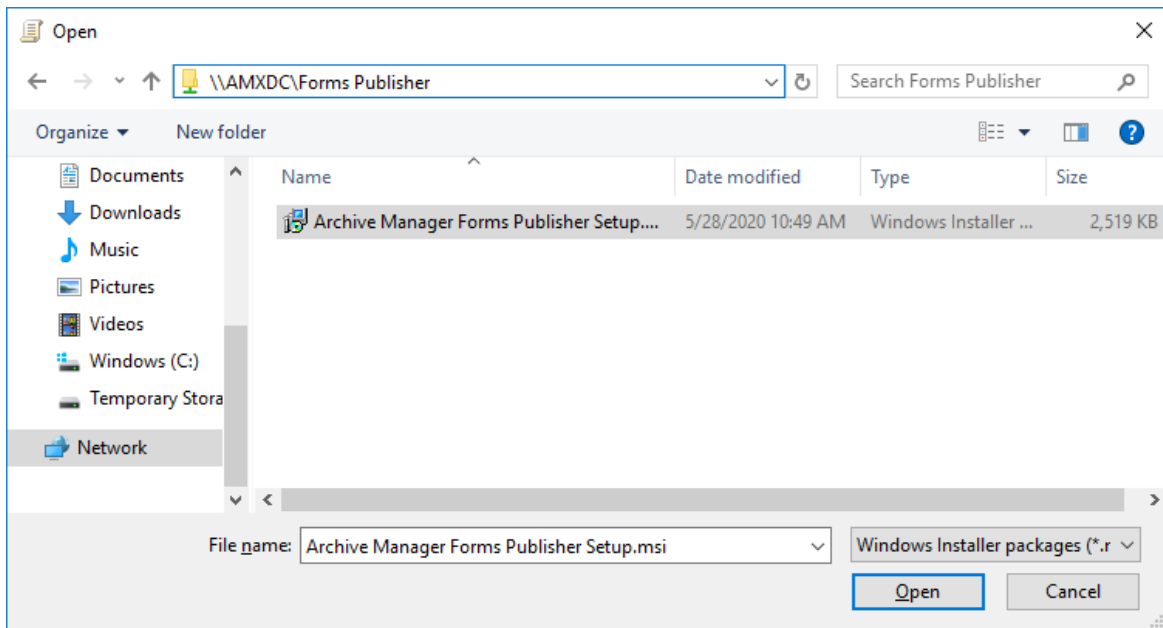
- [Create a shared folder on the domain controller for the Forms Publisher installer](#)
- [Create a registry item to store the web service URL that will be invoked by the Forms Publisher](#)
- [Create a GPO to distribute the Forms Publisher Setup to intended users](#)

### Create a shared folder on the domain controller for the Forms Publisher installer

1. Log in to your domain controller and open Server Manager.
2. Create a shared folder called **Forms Publisher**. Share it with all intended users with the **Read** permission. Note the UNC path of the shared folder



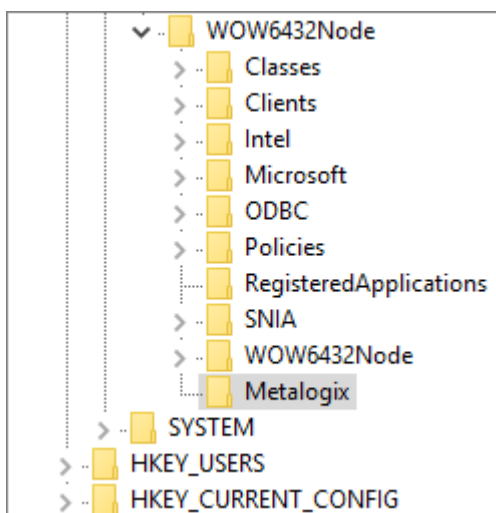
3. Copy and paste the **Archive Manager Forms Publisher Setup.msi** installer to your shared folder. This file is already in your Archive Manager server at this location: <shared-media-folder>\Archive Manager Installation Package\Exchange\Addin



## Create a registry item to store the web service that will be invoked by the Forms Publisher

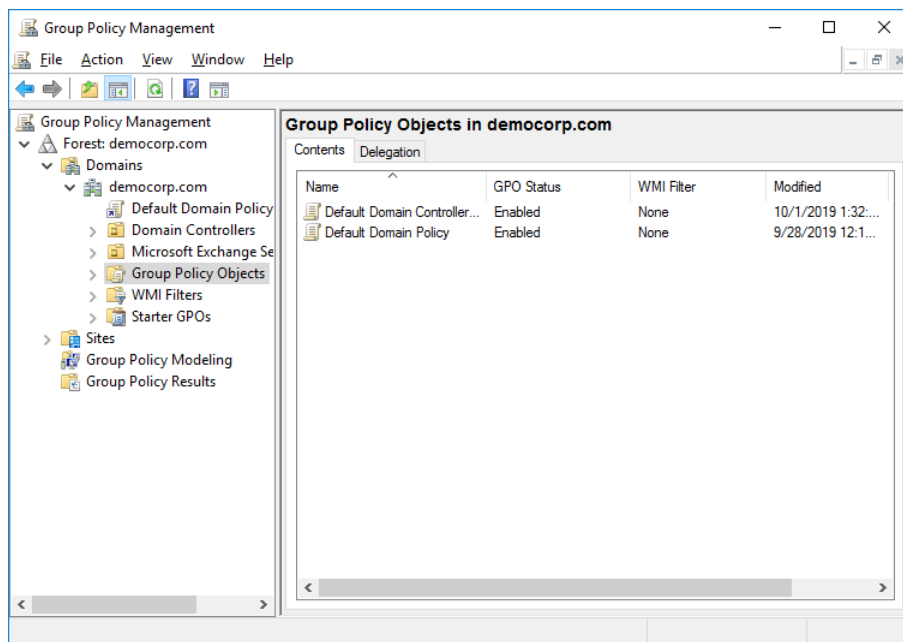
**CAUTION:** The following steps are instructions to modify the registry of the domain controller. Serious problems might occur if you modify the registry incorrectly by using the Registry Editor or by using another method.

- Open the Registry. Expand `HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node` and create a new key named **Metalogix**.

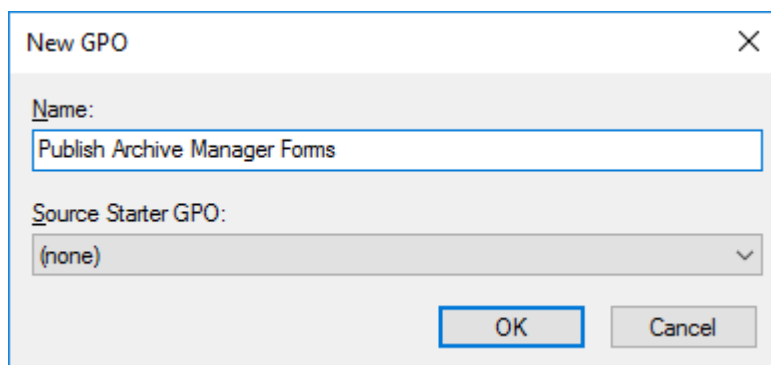


## Create a GPO to distribute the Forms Publisher Setup to intended users

- Click **Tools** and then click **Group Policy Management**. The *Group Policy Management* window opens.
- Expand the console tree **Forest > Domains > <YourDomain>** and click **Group Policy Objects**.



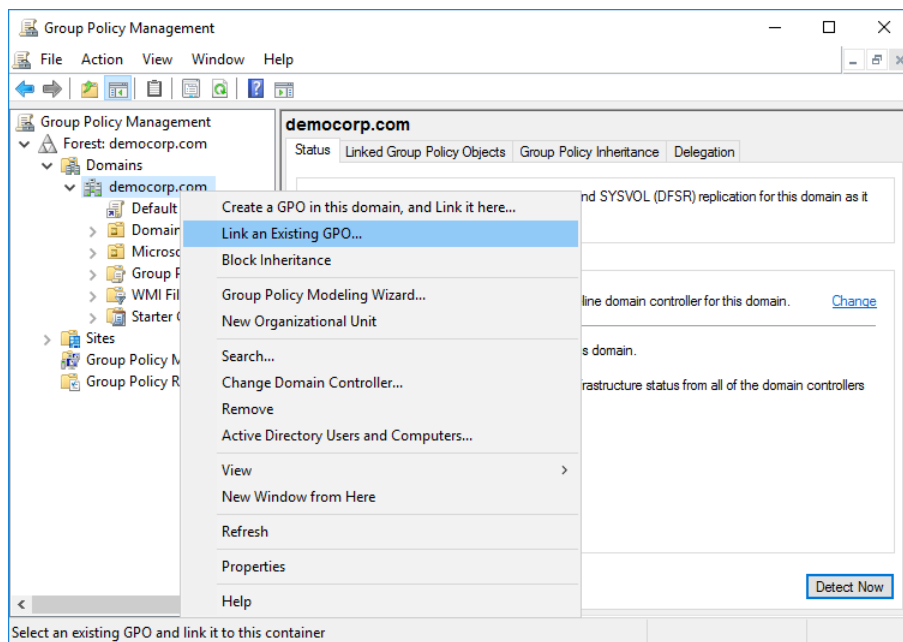
7. Right click in the *Group Policy Object* pane, and click **New** from the context menu. The *New GPO* window opens.



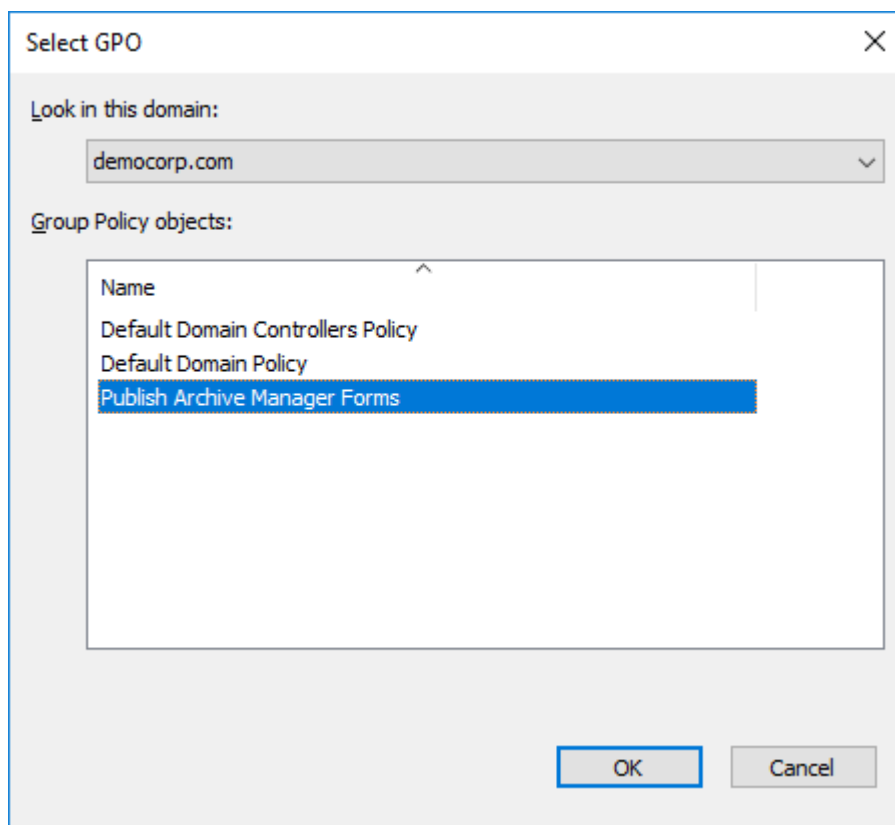
Enter the information as described below:

- a. **Name** - enter a unique name to describe the policy. For example, enter **Publish Archive Manager Forms**.
  - b. **Source Starter** - (none).
8. Click **OK** to save the new GPO.
  9. Right click your domain name and then click **Link an Existing GPO** from the context menu. The *Select GPO* window opens.

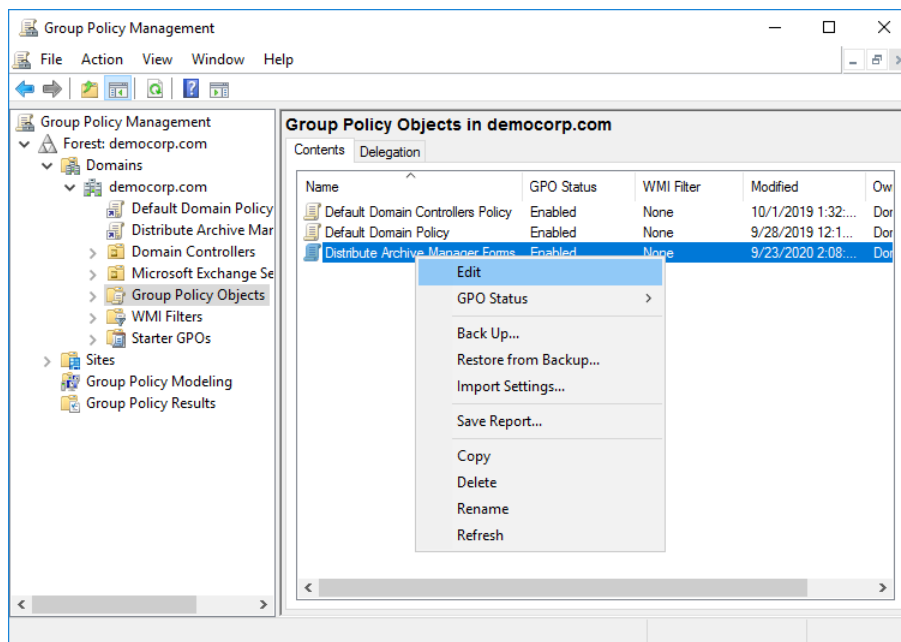




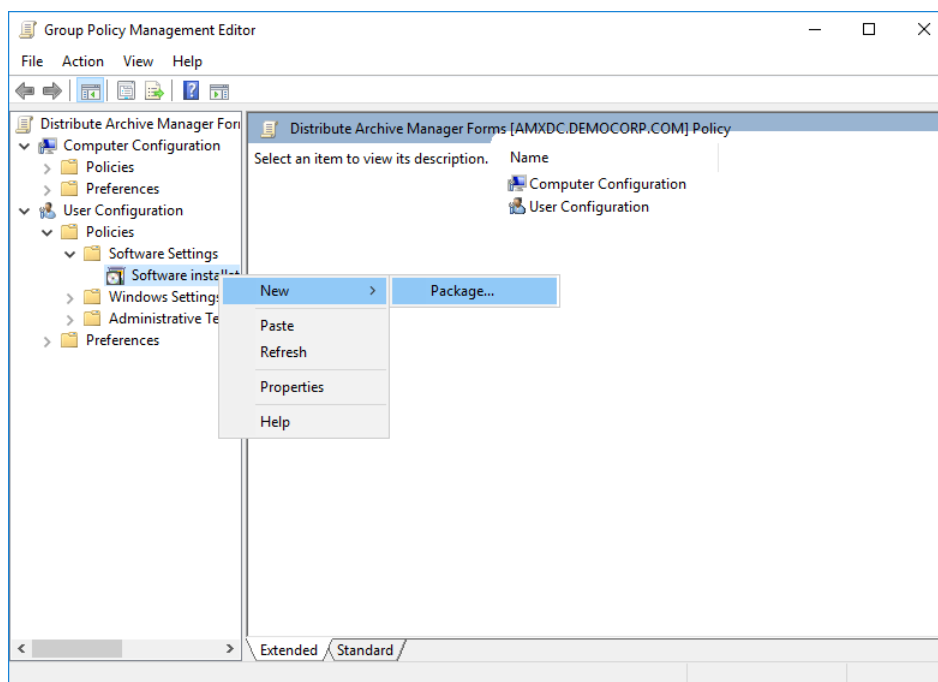
10. Choose the GPO that you created and then click **OK**.



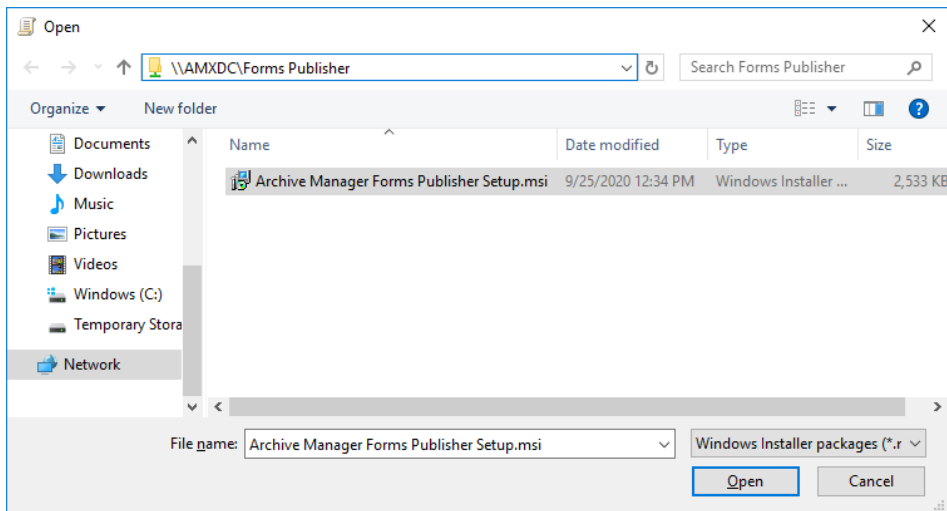
11. Right-click the GPO you created and then click **Edit**. The *Group Policy Management Editor* opens.



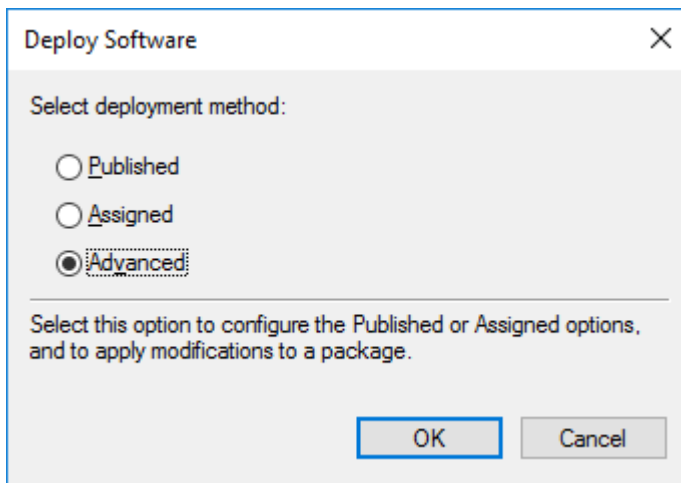
12. Navigate to **User Configuration > Policies > Software Settings > Software Installation**. Then right-click **Software Installation** to open the context menu. Click **New** and then click **Package**.



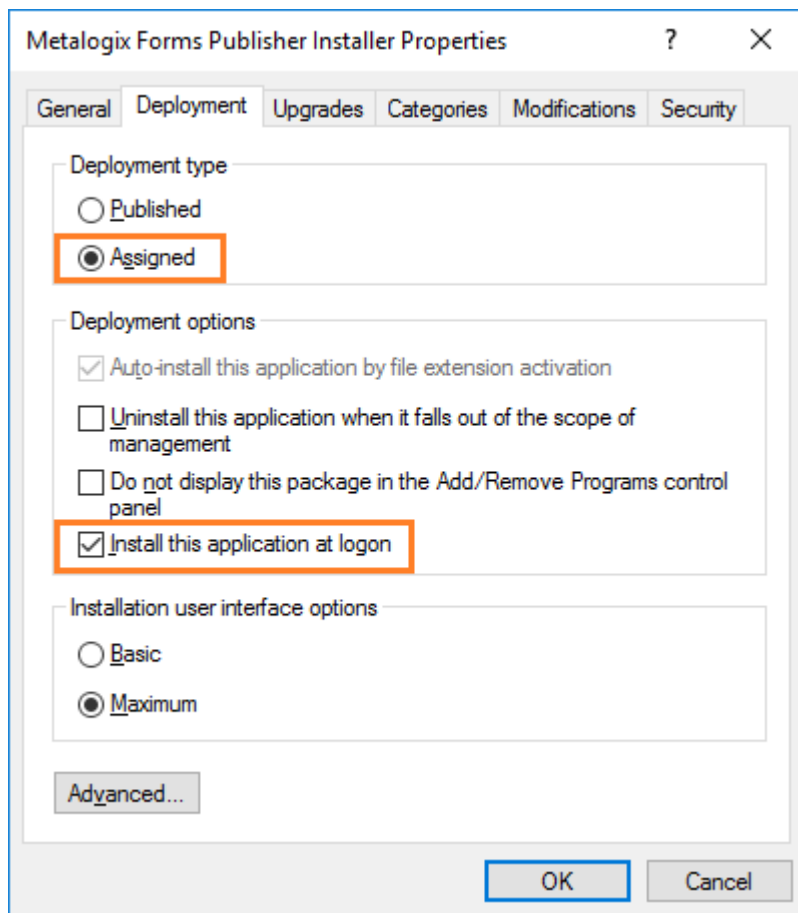
13. Browse to the shared folder you created in a step 2 above, and select the **Archive Manager Forms Publisher Setup.msi** installer.



14. Click **Open**. The *Deploy Software* window opens. Select the **Advanced** option.



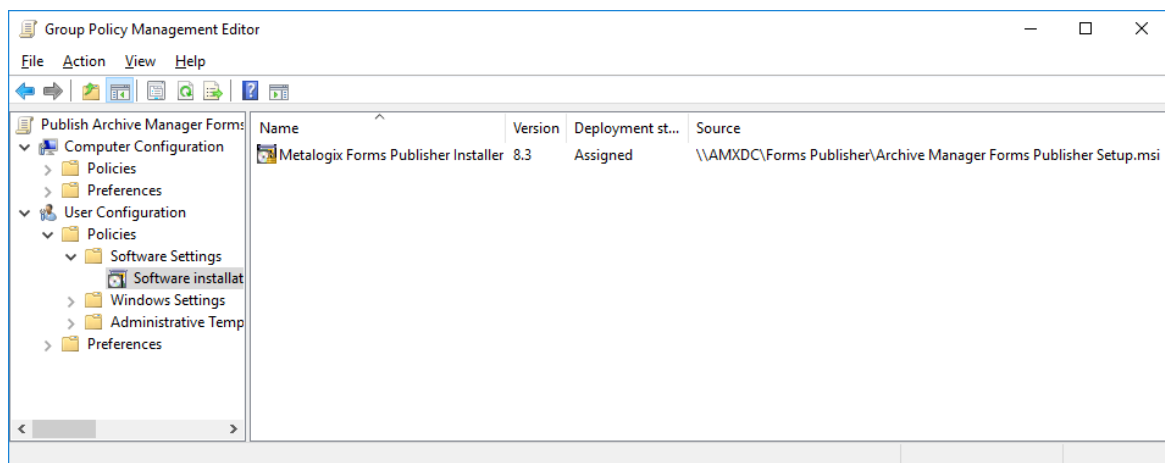
15. Click **OK**. The *Metalogix Forms Publisher Installer Properties* window opens. Click the **Deployment** tab.



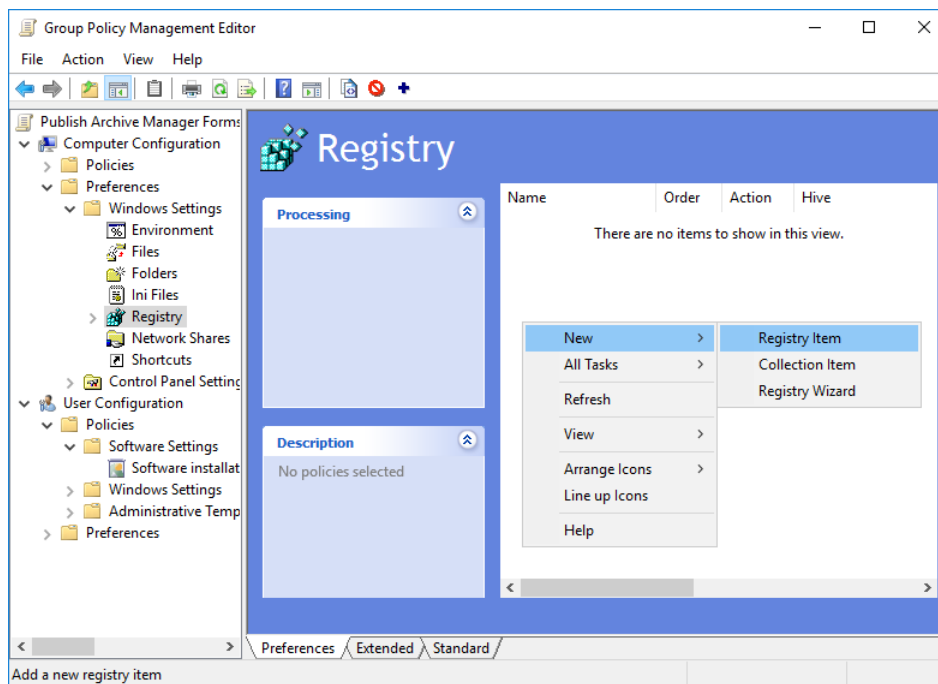
Set the properties as described below:

- a. From the *Deployment type* section, select the **Assigned** option.
- b. From the Deployment options section, select the **Install this application at logon** options check box.

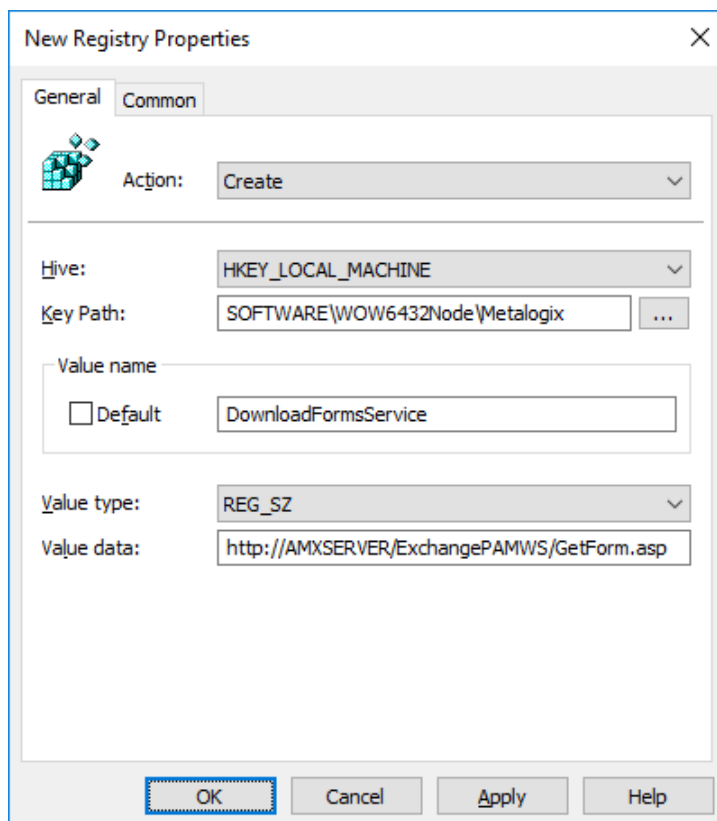
16. Click **OK** to close the *Metalogix Forms Publisher Installer Properties* window, and verify that application appears in the *Group Policy Management Editor*.



17. From the *Group Policy Management Editor* expand **Computer Configuration > Preferences > Windows Settings** and then click **Registry**.



18. Right-click in the items pane to open the context menu. Then select **New > Registry Item**. The new *Registry Properties* window opens.



In the new *Registry Properties* window create a new registry item with the following values:

- a. **Action** - select **Create** from the drop down.
- b. **Hive** - select **HKEY-LOCAL\_MACHINE** from the drop down.

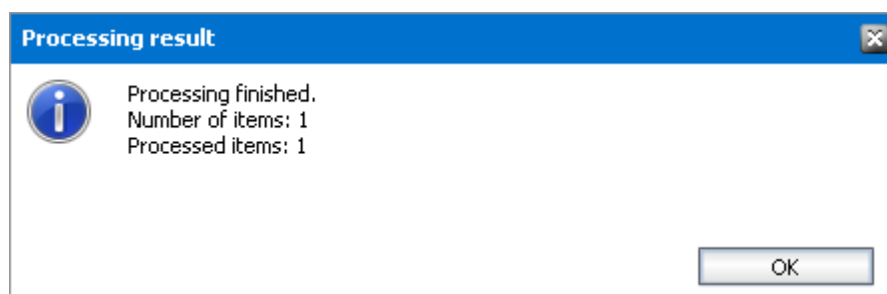
- c. **Key Path** - enter **SOFTWARE\Wow6432Node\Metalogix**
  - d. **Value name** - enter **DownloadFormsService**
  - e. **Value type** - select **REG\_SZ** from the drop down.
  - f. **Value data** - enter the address to web service which will download forms in the format **http://<Archive-Manager-Server>/ExchangePAMWS/GetForm.aspx**
19. Click **OK** to save the registry item. Verify that the registry item appears in the registry items list. Then exit the *Group Policy Management Editor* and the *Group Policy Management* tool.
- i** | **NOTE:** The user policy will not take effect until a fresh logon occurs after a reboot of the user's computer.
20. Verify that the GPO publishes the Archive Manager Forms to the *Personal Forms Library* when they log in to their computers.

# Installation Verification

When you have completed the installation and configuration as described in this guide, log on to the Archive server (eg. **AMXSERVER-A**) as the superuser and open Outlook. Send a couple of emails, in order to see if you can read them.

## Steps to verify your installation

1. Open the AMAC.
2. Click the **View** menu on the toolbar and select the **Archive** view.
3. In the **Look for** text field type the name of one of your synchronized mailboxes and click **Enter**.
4. After expanding the mailbox structure you will be able to see the list of emails in the right-pane of the AMAC.
5. Right-click any email from a mailbox and choose **Archive item** from the context menu.
6. If the archiving process ends with the following dialog you have successfully managed to archive your first email.

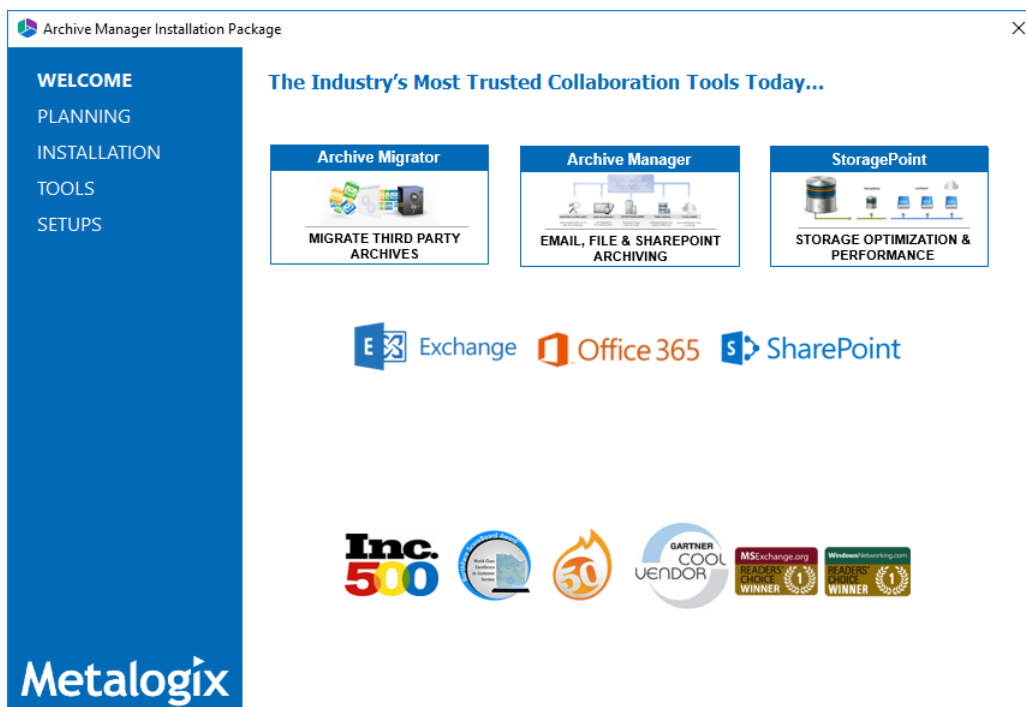


# Enhancements

Metalogix Archive Manager for Exchange can be extended with *optional* components to enhance its capabilities.

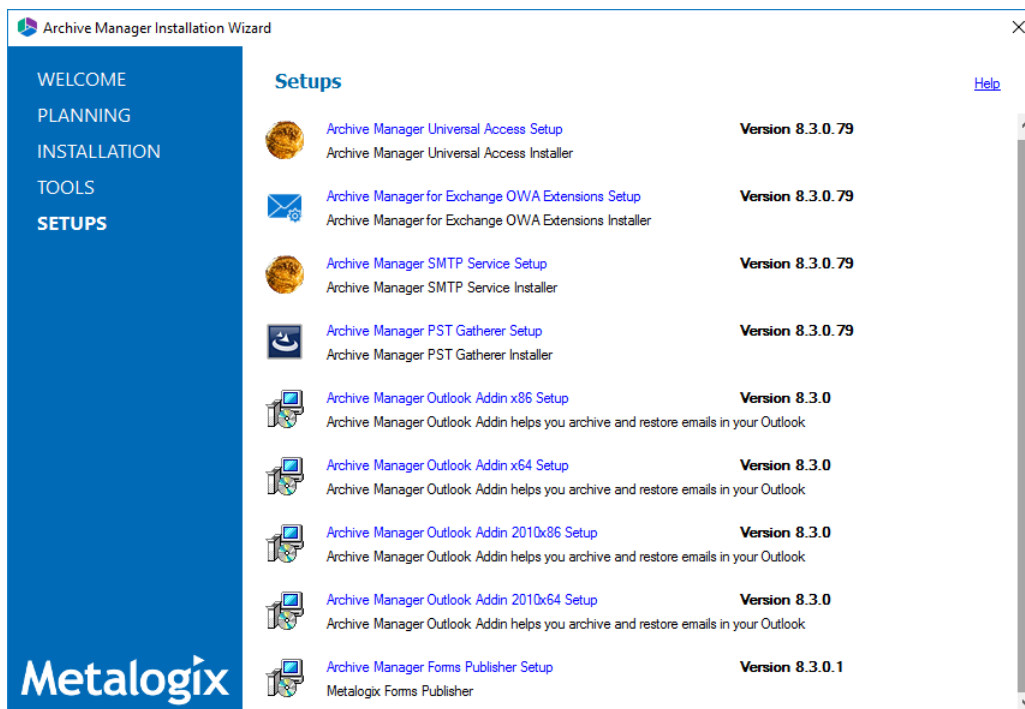
## Steps to install additional components

1. From your installation media folder, run the **MAMInstaller.exe**. The *Welcome* window appears.





2. From the navigation panel on the left, click **SETUPS**. The *Setups* window appears.



3. Install one or more optional components. The components are as follows
- **Archive Manager Universal Access Setup** - allows mobile users, Mac users and Linux users to work with archived emails. For more information see the *Universal Access Install Guide*.
  - **Archive Manager for Exchange OWA Extensions Setup** - component that is installed on the Microsoft Exchange Server to provide Outlook Web Access to end-users. For more information see the *OWA Installation Guide*.
  - **Archive Manager SMTP Service Setup** - enables processing of messages from an external email server (O365, Gmail, Exchange, etc.). For more information see the *SMTP Guide*.
  - **Archive Manager PST Gatherer Setup** - automated extension to the PST importer feature. For more information see the *PST Gatherer and Import Guide*.
  - **Archive Manager Outlook Addin <version> Setup** - gives authorized users the ability to archive and restore emails in Outlook 2013 and above (x86 or x64). For more information see the *MS Outlook Addin User Guide*.
  - **Archive Manager Forms Publisher Setup** – ensures that custom Outlook forms are used to display archived messages. For more information see the chapters *Publishing Archive Manager Forms* and *Publishing Archive Manager Forms for Office 365* in the *Advanced Installation Guide*.

## Addendum

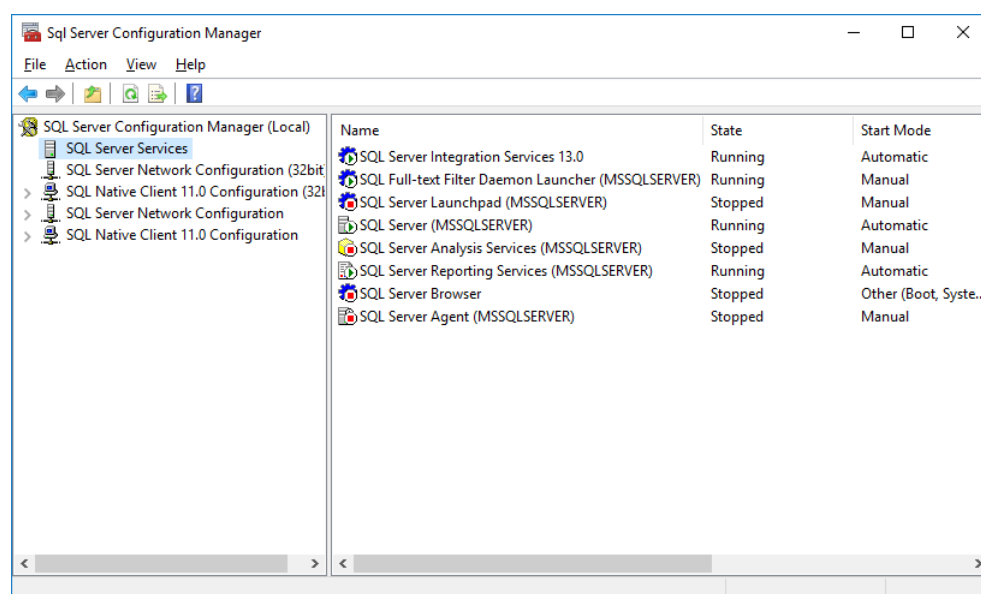
- [Creating an MS SQL database with a database user](#)
- [Organizational Forms Library troubleshooting](#)
- [License Activation](#)

## Setting up an MS SQL Server database

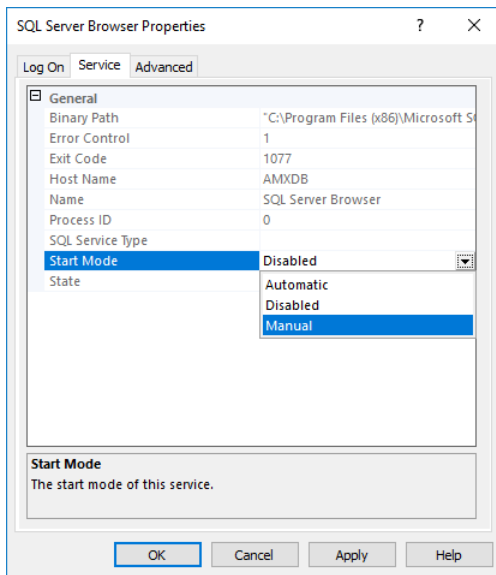
When planning to install Archive Manager, an empty database(s) and an appropriate database user must be created before running the setup. This section guides you through the configuration of SQL Server 2012 and creation of a database with a database user.

To configure your SQL Server 2012:

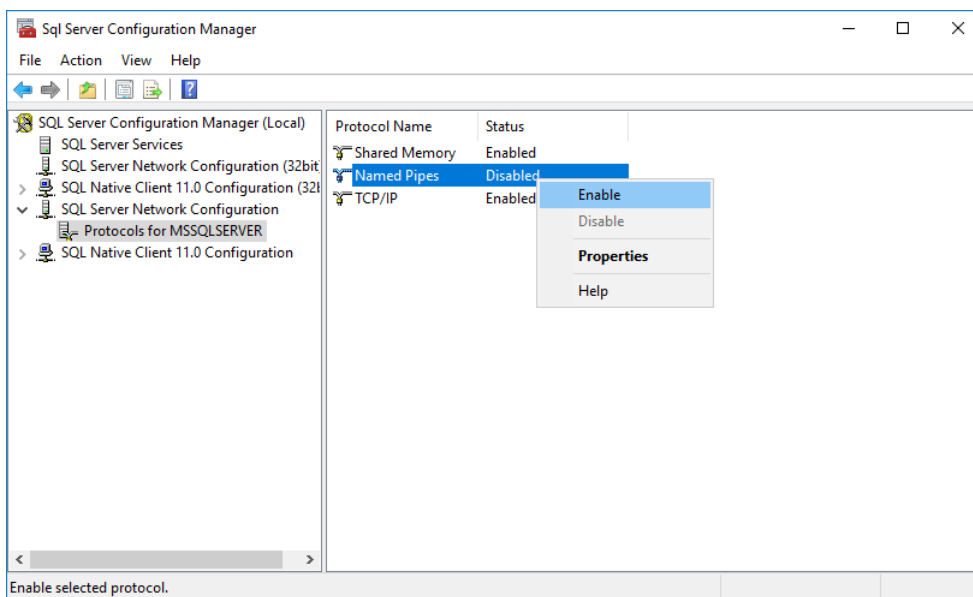
1. Open the **SQL Server Configuration Manager** and click the **SQL Server Services** node. Both the **SQL Server (SERVERNAME)** and the **SQL Server Browser** services have to run.



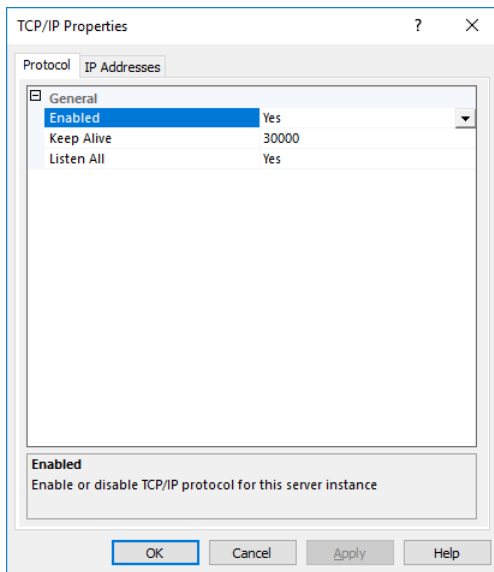
2. If the **SQL Server Browser** service is not started and the **Start** option available in its context menu, it means that this service is disabled. To enable the service, right-click it and from the context menu select **Properties**.
3. The **Properties** window opens. Switch over to the **Service** tab and change the **Start Mode** from **Disabled** to **Manual**. Conclude by clicking **Apply** and **OK** and then try to start the service again.



4. In the **SQL Server Configuration Manager** expand the **SQL Server Network Configuration** node from the navigation tree. On the **Protocols for SQL** node you need to enable the **Named Pipes**, the **Shared Memory** and the **TCP/IP** protocols.

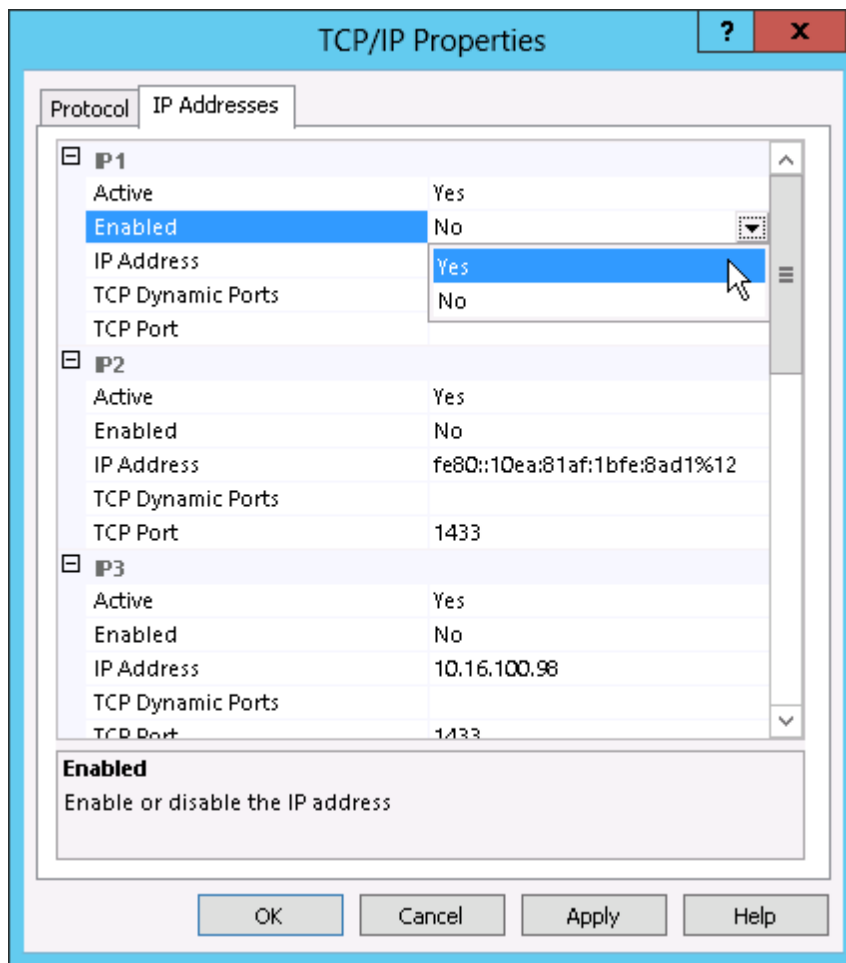


5. Instead of enabling the **TCP/IP** using the context menu, we recommend opening its **Properties** window. This window has two tabs, **Protocol** and **IP Addresses**. On the **Protocol** tab set the **Enabled** to **Yes**.



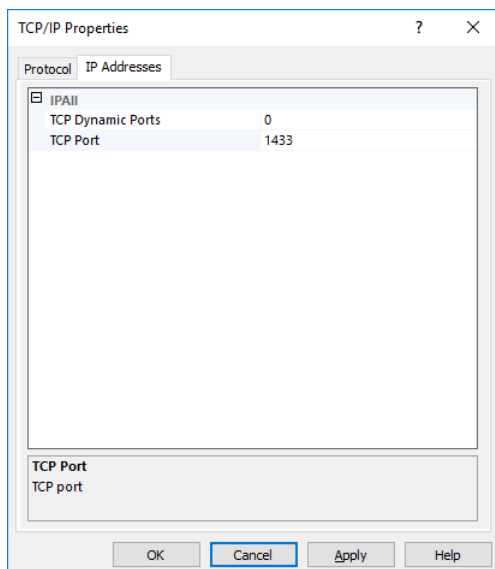
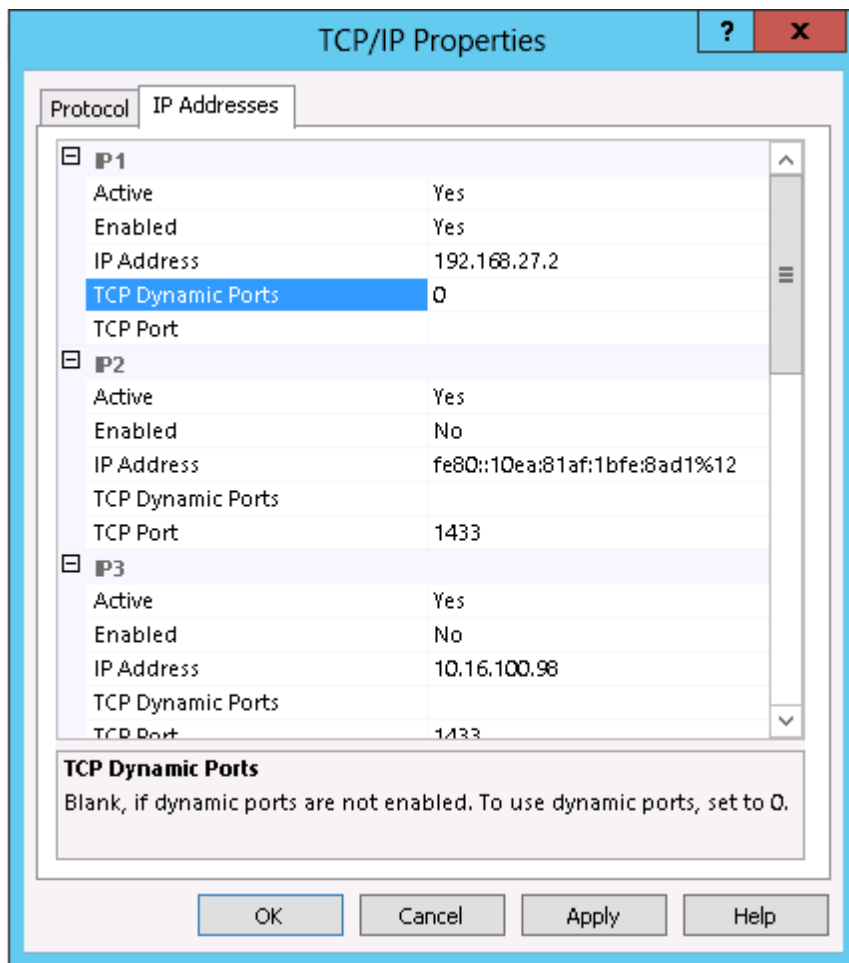
6. On the IP Addresses tab you will see several sections - one for each network connection and a local loopback connection indicated by the standard address of 127.0.0.1 For remote access to the SQL Server Express 2012 instance the loopback connection is of no interest.

For the desired network connection the **Active** option should say **Yes** as should the **Enabled** option. The IP address will probably be filled in for you (by Windows) and will be different on your machine.

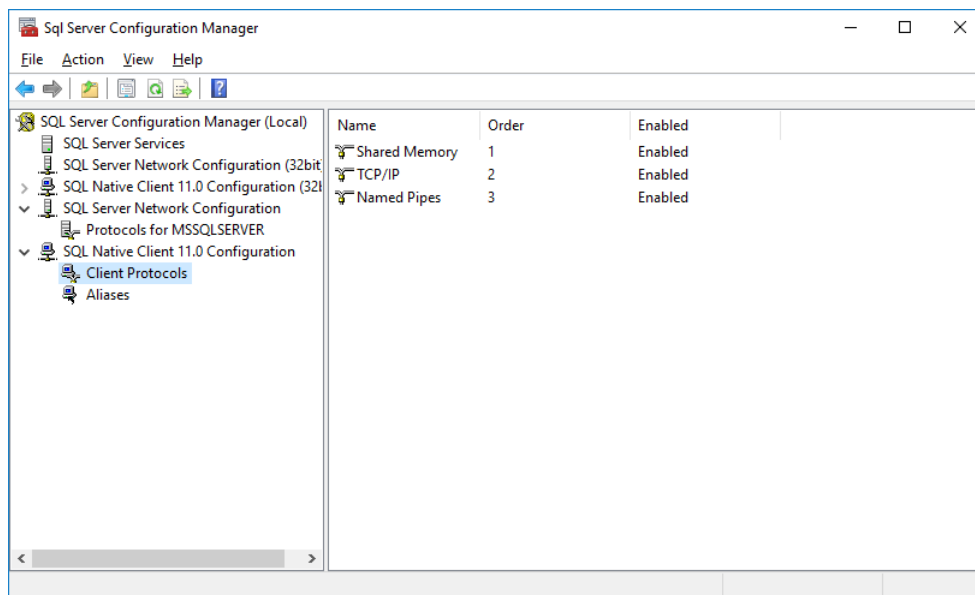


If you wish to enable dynamic ports for your SQL Server Express 2012 instance then the **TCP Dynamic Ports** option should be **0**. To disable this option and use a fixed port change this field to a blank value and fill in the port on the **TCP Port** option. Disabling dynamic ports is non standard for named instances and should really only be done if you know exactly what you are doing and why you want to do it.

Conclude by clicking **Apply** and then **OK**.

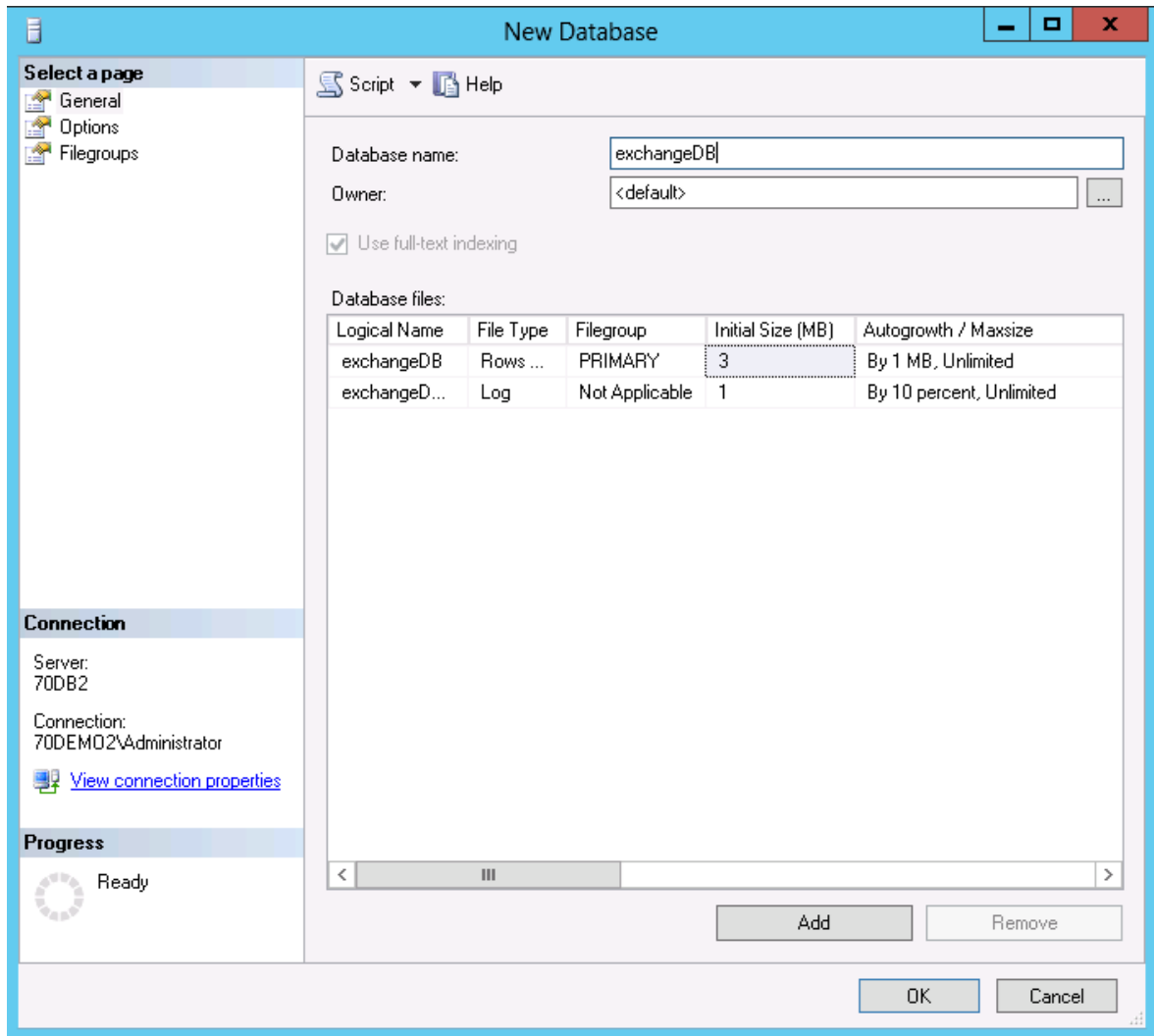


- For the changes to take effect you need to restart both the **SQL Server (SERVERNAME)** and **SQL Server Browser** services have to be restarted switching over to the **SQL Server Services** node.
- Check the **Shared Memory**, the **TCP/IP** and the **Named Pipes** client protocols on the **SQL Native Client Configuration** node in the **SQL Server Configuration Manager** too. They should all be enabled.



Furthermore you will need to create an empty database and a database user for your Archive Manager. To do so:

1. Connect to your SQL Server 2012 with the **Microsoft SQL Server Management Studio**, then expand its tree and right-click on the **Databases** node. From the context menu choose to create a new database.
2. In the **New Database** dialog, give the new database a name (e.g. exchangeDB) and you can leave the owner to be the <default>. This owner will be changed later on, when you will create a new login with table owner rights over the database you are creating. You can also choose to change the default location for the Data file and Log file, if needed. Finish by clicking **OK**.



3. To create the Table Owner for the exchangeDB database you will need to create a new login, a new scheme and a new user as well. We will name each of them “srv\_exchange”.

To create a new login, expand the tree of the **MS SQL Server Management Studio** tool and right-click on the **Security** tab and choose **New/Login**.

4. The new dialog opens. Before proceeding further on the **General** tab decide on the type of authentication to be used:

**Windows authentication** - the user (e.g. “srv\_exchange”) must already exist in the Active Directory. Use the **Search** button to find your desired user in AD. It can be your Archive Manager super-user as is described in the section “Creating a super-user account”.

**SQL authentication** – specify the login name (“srv\_exchange” in our example). Make sure to **uncheck** the **Enforce password policy** check box.



**Login - New**

Script Help

**Select a page**

- General
- Server Roles
- User Mapping
- Securables
- Status

**Connection**

Server: 70DB2

Connection: 70DEMO2\Administrator

[View connection properties](#)

**Progress**

Ready

Login name:  Search...

☒ Windows authentication

☐ SQL Server authentication

Password:

Confirm password:

☐ Specify old password

Old password:

☒ Enforce password policy

☒ Enforce password expiration

☒ User must change password at next login

☐ Mapped to certificate

☐ Mapped to asymmetric key

☐ Map to Credential  Add

Mapped Credentials

Credential	Provider

Remove

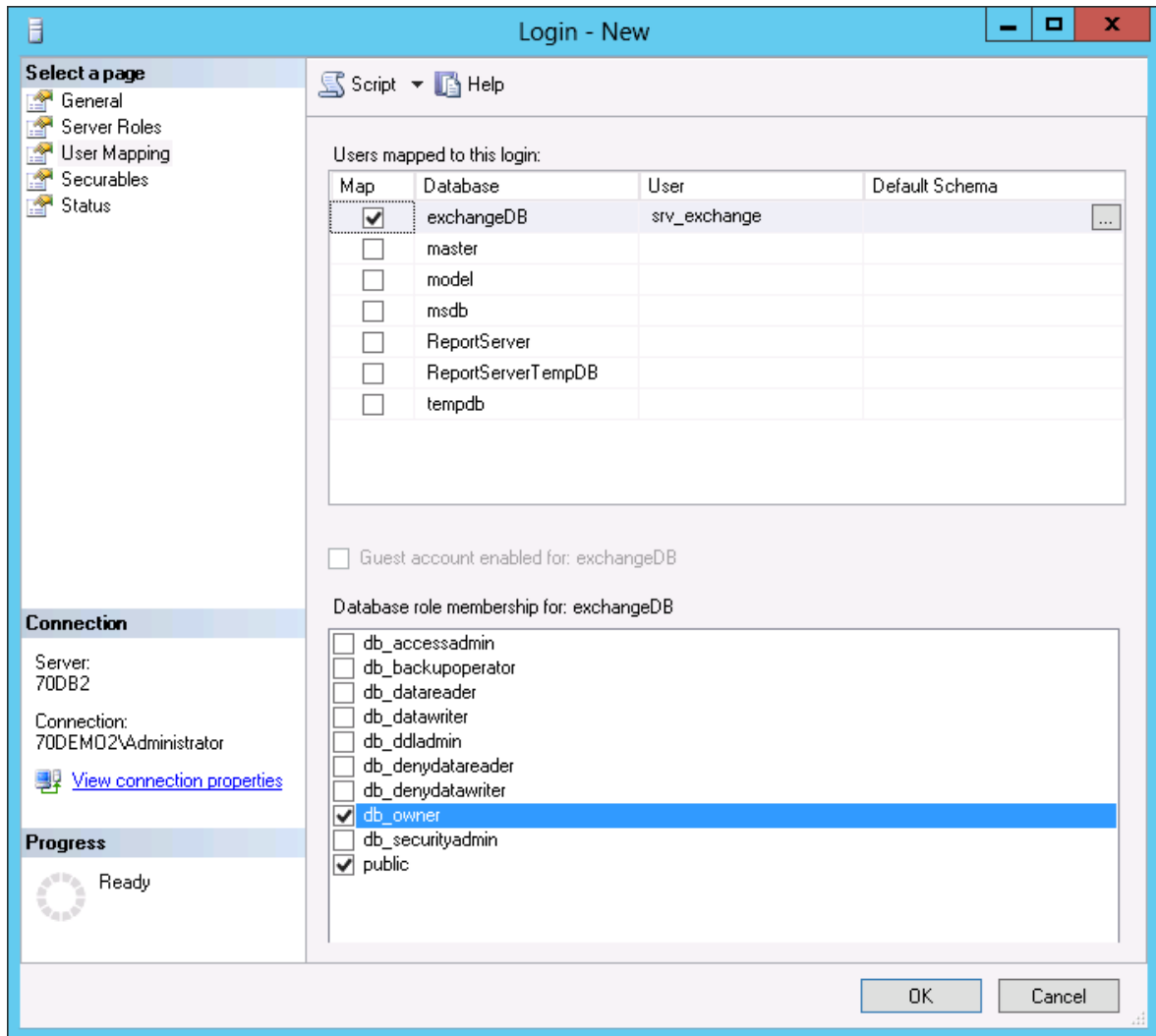
Default database:

Default language:

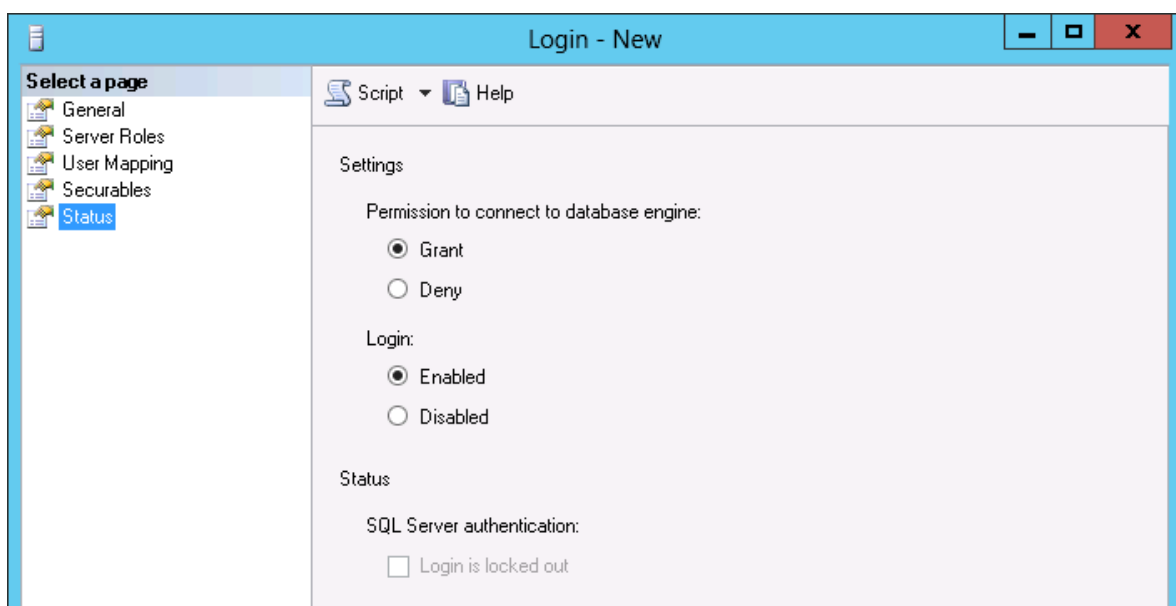
OK Cancel

As for the **Default database**, select the **EXCHANGEDB** database and set the **Default language** to be English.

- Once this is done, you can switch over to the **User Mapping** tab. Here map to the *exchangeDB* database a user (it will be automatically created and named with the same name as the login) and select also the **db\_owner** and **public** membership role for the *exchangeDB* database.

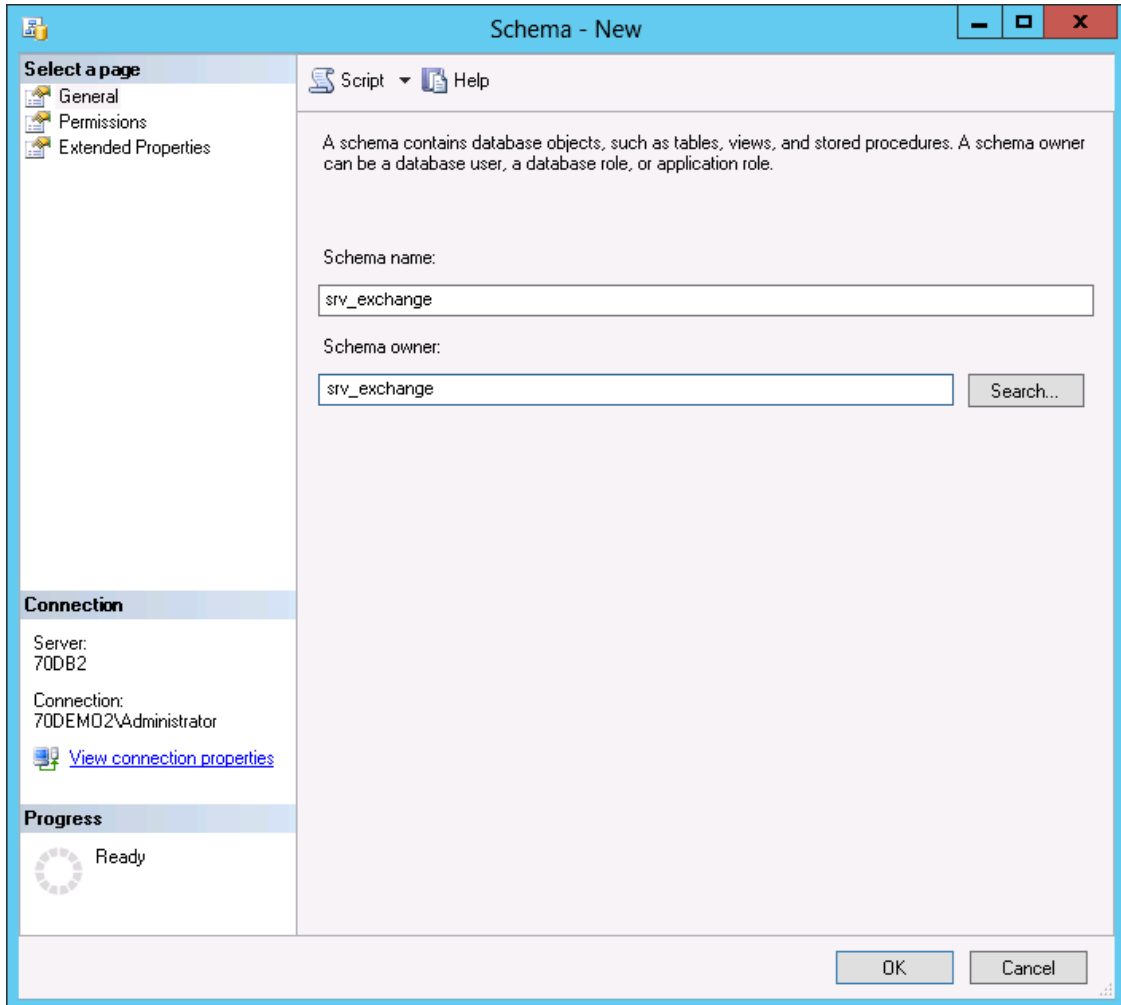


- Switching over to the **Status** tab. Make sure that the *Permission to connect to database engine* is **granted** and also that the *Login* is **enabled**. Conclude by clicking **OK**.



- Next you will need to create a schema for your new database login. To do so, expand the tree on the new created database (*exchangeDB*) in the **Microsoft SQL Server Management Studio** tool down to **Security/Schemas**. Right-click on **Schemas** and choose **New Schema** from the context menu.

In the **New schema** dialog just give a name to the schema you want to create (e.g. *srv\_exchange*) and click the **Browse** button to select the schema owner. Select the schema owner to be the previous user you have specified in step 4 (*srv\_exchange*). Click **OK**.

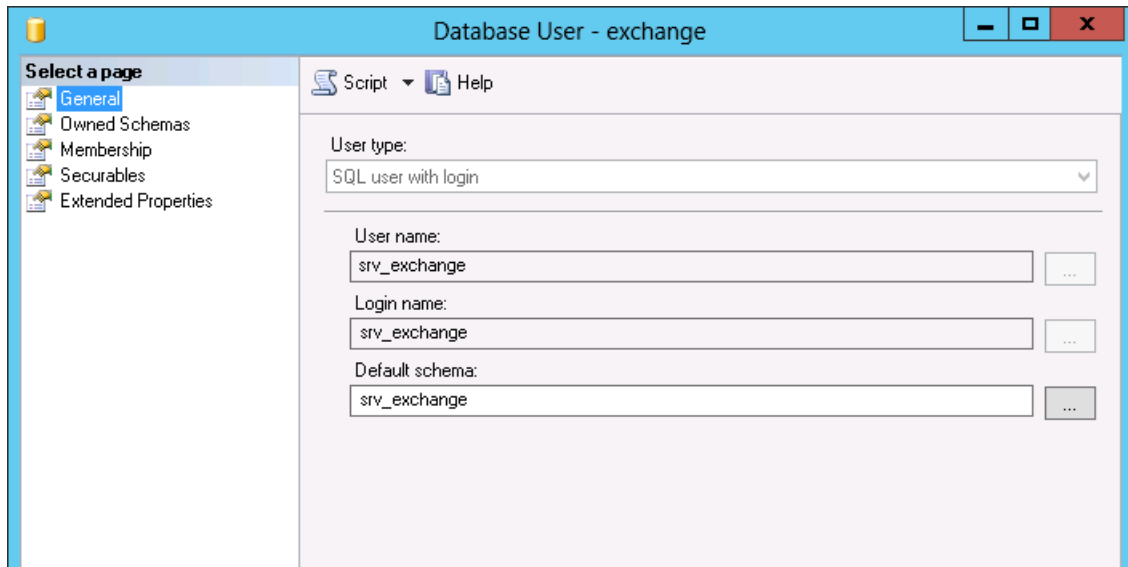


- Furthermore you will need to assign the new created schema to your new database user. The new database user (*srv\_exchange*) was automatically created when creating the new login and mapping a user to the exchangeDB database.

To locate this new user, expand the tree of the **exchangeDB** database in the **MS SQL Server Management Studio** tool down to **Security/Users**.

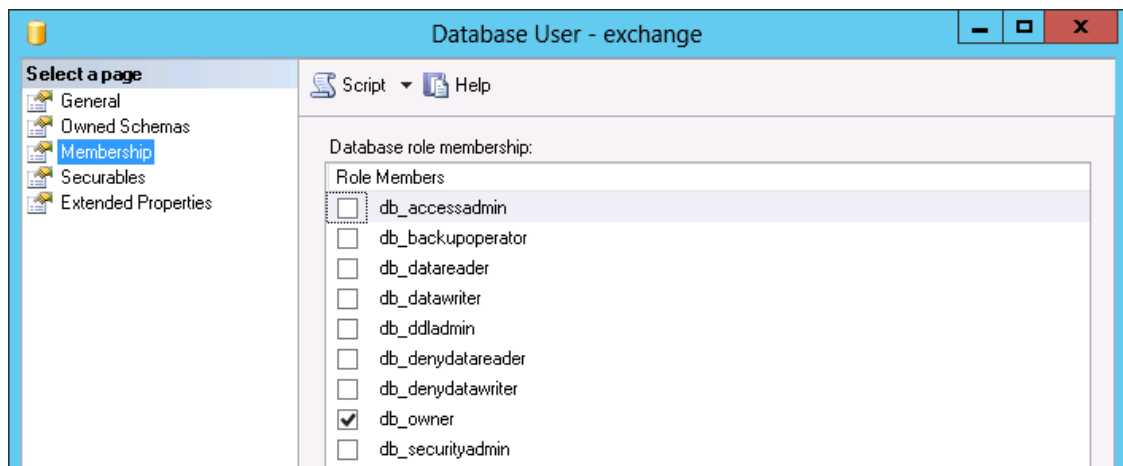
By clicking on the **Users** node you will see the user called *srv\_exchange* on the right pane of the tool. Double-click on it to open its **Properties** window.

A new dialog opens on the **General** tab. Click the browse button next to the **Default Schema** text box and select the previously created user "*srv\_exchange*".



9. Switch to **Owned Schemas** node where you will see that the one called `srv_exchange` is selected. Make sure that the **db\_owner** is selected too.

Now switch to the **Membership** node and make sure that **db\_owner** is selected here, too. Save the changes you have made by clicking **OK**.



*Metalogix makes every effort to perform comprehensive testing but cannot guarantee, due to environmental differences, that all functions will work in every environment. It is always recommended that testing be conducted within your own environment to confirm functionality and compatibility.*

## Organizational Forms Library troubleshooting

Sometimes the Organizational Forms Library may not be accessible in Outlook after Archive Manager for exchange installation. This error may occur if there are too many mailboxes with full access permission for the given user and as a result, Public Folders become inaccessible. To address this error, use the following workaround:

1. Close Outlook.

2. In the Exchange server, open *Exchange Management Shell*.
3. Run the following command where #USERALIAS is alias for given user and #USEREMAIL is the email address of the given user:

```
Get-Mailbox -ResultSize unlimited -Filter {(RecipientTypeDetails -eq 'UserMailbox') -and (Alias -ne '#USERALIAS')}} | Remove-MailboxPermission -User #USEREMAIL -AccessRights fullaccess -InheritanceType all
```

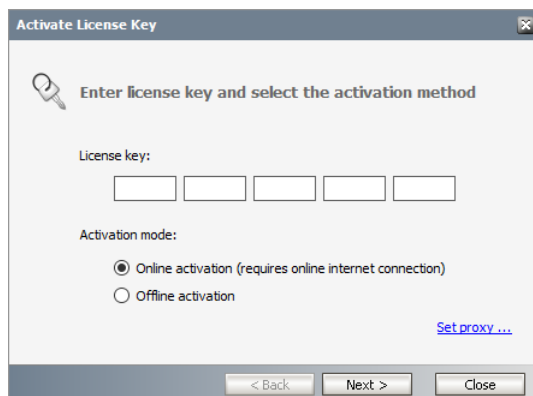
4. Open Outlook with the profile of the superuser. Now *Organizational Forms Library* should be accessible.
5. (Optional) Open Exchange Management Shell and run the following command to give full access permissions to all mailboxes to the superuser

```
Get-Mailbox -ResultSize unlimited -Filter {(RecipientTypeDetails -eq 'UserMailbox') -and (Alias -ne '#USERALIAS')}} | Add-MailboxPermission -User #USEREMAIL -AccessRights fullaccess -InheritanceType all
```

## License Activation

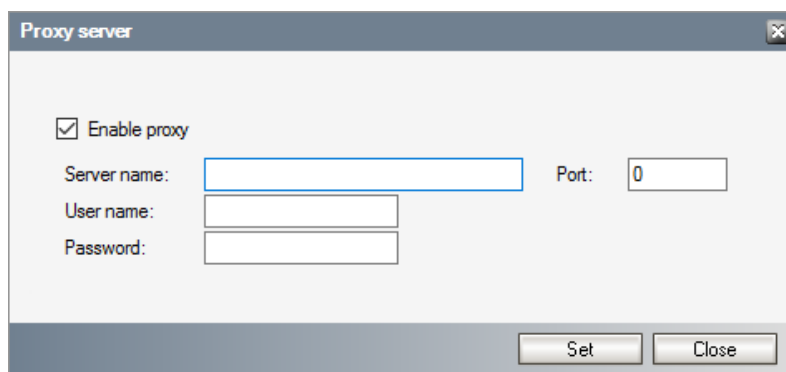
### Online activation

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



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

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



1. Select **Enable Proxy**.
2. In the **Server Name** field, enter the name of your proxy server.
3. In the **Port Number** field, enter the port number of the proxy server.
4. Specify the credentials of the user who is authorized to access the proxy server.
5. Click **Set** to preserve the information, or click **Close** to return to the **License Key Information** dialog.

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

## Offline activation

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

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



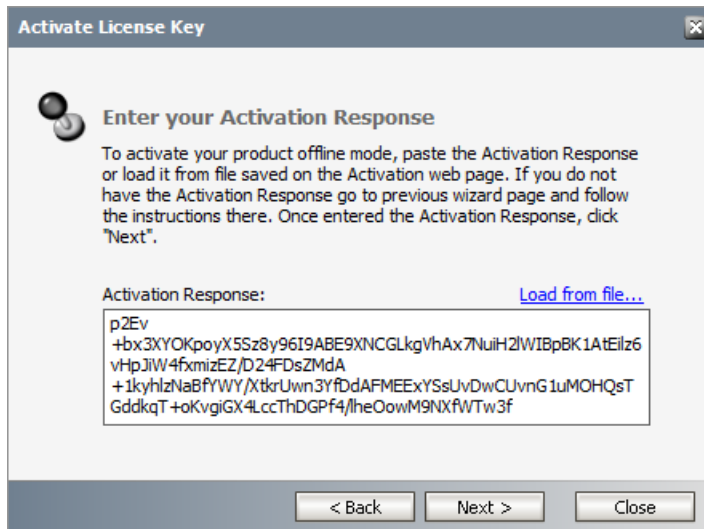
Option 1: Copy Activation Data to Clipboard. The activation data is saved to memory. Use this option if you plan to follow through with the subsequent steps immediately.

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

4. **Step 2: Submit collected data**
  - a. Click **Go**. The **Metalogix License Activation** web page appears.

- b. Follow the instructions to get the **Activation Key file** (with the file extension DAT) is made available for download. Save this file to a location of your choice.

## 5. Step 3: Paste Activation Response



- a. Click **Load from File**. The Windows file dialog appears.
- b. Locate the activation key file and click **Open**. The text appears in the **Activation Key File** field.

## 6. Step 4: Activate offline

- a. Click **Next** to complete the activation process.
7. If the license key is validated successfully, the confirmation message appears along with the license details. Click **Finish** to close the dialog.

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## About Us

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

## Contacting Quest

For sales or other inquiries, visit [www.quest.com/contact](http://www.quest.com/contact).

## Technical Support Resources

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

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

- Submit and manage a Service Request
- View Knowledge Base articles
- Sign up for product notifications
- Download software and technical documentation
- View how-to-videos
- Engage in community discussions
- Chat with support engineers online
- View services to assist you with your product