

Metalogix[®] 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.

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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.
 - \circ <code>Documentation</code> 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 endusers 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 Office 365 (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

i 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

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

Windows Server Roles

- Web Server (IIS)
 - \circ Web Server > Common HTTP Features > HTTP Redirection
 - Web Server > Performance > Dynamic Content Compression
 - Web Server > Security > Basic Authentication
 - \circ Web Server > Security > Windows Authentication
 - \circ Web Server > Application Development
 - .NET Extensibility 3.5
 - .NET Extensibility 4.5 or later
 - ASP.NET 3.5
 - ASP.NET 4.5 or later
 - \circ Management Tools > IIS 6 Management Console
 - \circ Management Tools > IIS 6 Management Compatibility > IIS 6 Metabase Compatibility
 - Management Tools > Management Service

Windows Features

- Remote Server Administration Tools
 - $\,\circ\,$ Role Administration Tools > AD DS and AD LDS Tool > Active Directory module for Windows PowerShell
 - **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 (\checkmark)

Client	Exchange 2019	Exchange 2016	Exchange 2013 SP1 and later
Office 365	\checkmark	\checkmark	\checkmark
Outlook 2019 (32-bit)	\checkmark	\checkmark	\checkmark
Outlook 2016 (32-bit)	✓ ¹	✓ ¹	✓
Outlook 2013 (32-bit)	✓ ¹	√1	✓

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
 - $\,\circ\,$ Microsoft OLE DB Driver 18 for SQL Server, or newer
- Oracle 12c to Oracle 19c
 - \circ 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 singled 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.

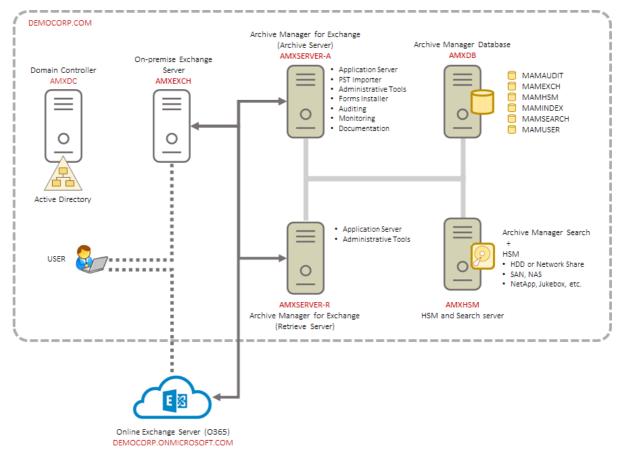


Figure 1. Topology for a distributed deployment of Metalogix Archive Manager for Exchange

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, 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 <u>Manual Installation</u> 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.

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 <u>Deployment Plan</u>. 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.

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 <u>Manual Installation</u>.

In this chapter:

- <u>Setup the Superuser Account</u>
- <u>Prepare the Application Servers</u>
 - o Steps to download the install media
 - o Steps to install the prerequisites
 - o Steps to install Microsoft Outlook
- Install the Application Features
 - o Install HSM and Archive Manager Search
 - o Install Archive Manager for Exchange (Archive server)
 - o 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. <u>Steps to add the superuser as a database user with sysadmin role</u> (for Windows authentication only)
- **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 <u>Setup the Superuser</u> <u>Account</u> 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.

New Object - User		\times
Create in:	democorp.com/Users	
<u>F</u> irst name:	MAM Initials:	
Last name:	Administrator	
Full n <u>a</u> me:	MAM Administrator	
User logon name:		
mamadmin	@democorp.com ~	
User logon name (pre	- <u>W</u> indows 2000):	
DEMOCORP\	mamadmin	
	< <u>B</u> ack <u>N</u> ext > Cance	el

- 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.

New Object - User	×
Create in: democorp.com/Users	
When you click Finish, the following object will be created:	
Full name: MAM Administrator	~
User logon name: mamadmin@democorp.com	
The password never expires.	
	\sim
< <u>B</u> ack Finish	Cancel

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.

Select Users, Computers, Service Accounts, or Group)5	×
Select this object type:		
Users, Service Accounts, or Groups		Object Types
From this location:		
democorp.com/Users		Locations
Enter the object names to select (examples):		
MAM Administrator (mamadmin@democorp.com)		Check Names
Advanced	OK	Cancel

- 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.
- **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.
- **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 <u>System Requirements</u> and <u>About User Accounts</u> 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
- <u>Steps to install Microsoft Outlook</u>
- Steps to download the install media

For the Retrieve server (AMXSERVER-R)

- Steps to install the prerequisites
- <u>Steps to install Microsoft Outlook</u>
- 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

- **NOTE:** These PowerShell commands are compatible with a Window 2016 operating system. Please refer to the <u>System Requirements</u> 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 <u>System Requirements</u> 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 <u>https://www.quest.com/products/metalogix-archive-manager-for-exchange</u> page

or

navigate to the <u>http://www.quest.com/trials</u> 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

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.

ltem	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: ************

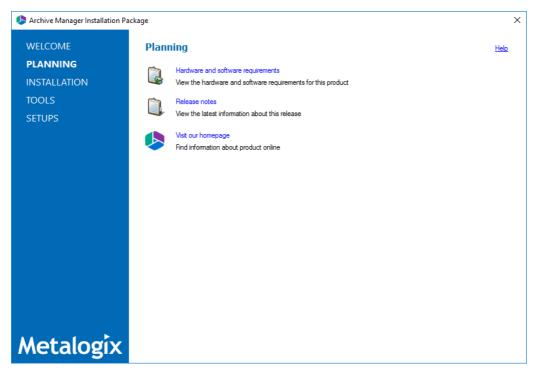
Superuser account	Windows account that is used to install the application and run the Archive Manager for Exchange services.	username: democorp\mamadmin password: ************
Media Folder	Full path of the folder where the media files are extracted	C:\Metalogix
Installation folder	Full path of the folder 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</i> <i>Guide</i> .
Store name	Name of the media store on a hard drive. With the Advanced Installation 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: Integrated Windows Authentication or SQL Authentication	Integrated Windows Authentication
UserLogin	Username if <i>SQL Authentication</i> is selected	dbadmin
Password	Database password if <i>SQL</i> <i>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.

l Archive Manager Installation Pa	ckage	×
WELCOME	Server Installation	
PLANNING		
INSTALLATION	Software Transaction Agreement	^
TOOLS SETUPS	PLEASE READ THIS AGREEMENT CAREFULLY BEFORE USING THIS PRODUCT. BY DOWNLOADING, INSTALLING OR USING THIS PRODUCT, YOU ACCEPT AND AGREE TO THE TERMS AND CONDITIONS OF THIS AGREEMENT. FOR ORDERS PLACED OUTSIDE THE UNITED STATES OF AMERICA, PLEASE GO TO <u>http://guest.com/legal/sta.aspy</u> to VIEW THE APPLICABLE VERSION OF THIS AGREEMENT FOR YOUR REGION. IF YOU DO NOT AGREE TO THE TERMS AND CONDITIONS OF THIS	
	AGREEMENT OR THE APPLICABLE VERSION OF THIS AGREEMENT FOR YOUR REGION, DO NOT DOWNLOAD, INSTALL OR USE THIS PRODUCT. IF YOU HAVE A SIGNED AGREEMENT WITH PROVIDER THAT IS SPECIFICALLY REFERENCED IN AN ORDER THAT IS EXECUTED BETWEEN YOU AND PROVIDER, THEN THAT SIGNED AGREEMENT WILL SUPERSEDE THIS AGREEMENT.	
	This Software Transaction Agreement (the "Agreement") is made between you, the Customer ("Customer" or "You") and the Provider, as defined below.	
	1. Definitions. Capitalized terms not defined in context shall have the meanings assigned to them below:	
	(a) "Affiliate" means any legal entity controlling, controlled by, or under common control with a party to this Agreement, for so long as such control relationship exists.	
	(b) "Appliance" means a computer hardware product upon which the Software is pre-installed and delivered.	
	(c) "Documentation" means the user manuals and documentation that Provider makes available for the Software, and all copies of the foregoing.	
	(d) "eStore" means Provider's online Software ordering system located at http://guest.com/shop/.	
	(e) "License Entitlements" means the quantities and versions of Products licensed to Customer, the new versions and	*
	✓ I accept the terms of the license agreement.	
Metalogix	Next > Cancel]

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.

Archive Manager Installation Pa	ckage	×
WELCOME	Installation Mode	<u>Help</u>
PLANNING		
INSTALLATION	Please select which type of installation would like to run:	
TOOLS	0.5	
SETUPS	O Express installation	
	Advanced installation	
	O Upgrade	
Metalogix	< Back Next > Ca	ancel

7. Click Next. The Installation Components window opens.

Archive Manager Installation W	izard	×
WELCOME PLANNING	Installation Components	<u>Help</u>
INSTALLATION TOOLS SETUPS		Installed version
	Archive Manager for Exchange 82.0.167 Archive Manager Search 82.0.167 ArchiveWeb 82.0.167	
	Product description: ArchiveWeb offers an intuitive interface to access archived data and provides search templates, advanced search f categorization abilities, legal hold, full auditing, 3rd party export and collaborative eDiscovery review capabilities.	ilters, tagging and
Metalogix	Installation folder: C:\Program Files (x86)\Metalogix < Back Next >	Browse

Select HSM and Archive Manager Search.

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

l Archive Manager Installation	n Wizard	×
WELCOME	Database Engine	<u>Help</u>
PLANNING		
INSTALLATION	Archive Manager and its related applications can store metadata in various database engines. Please select the database engine you would like to use.	
TOOLS	riease seleci une database engine you would like to use.	
SETUPS	Microsoft SQL Server	
	Azure SQL Server	
	O Oracle	
Metalogix	< Back Next >	Cancel

Select either Microsoft SQL Server or Oracle.

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

line Manager Installation Wi	zard	×
WELCOME	Checking Prerequisites	Help
PLANNING INSTALLATION TOOLS	Microsoft Data Access Components Version 10.0 of MDAC was detected.	*
SETUPS	OLE DB Driver for SQL Server OLE DB Driver for SQL Server is missing from the computer. Please install the required driver: OLE DB Driver 18 for SQL Server Install InstallInstall	\
	Visual C++ Redistributable Packages Some required packages are missing from the computer. Please install the required version of Redistributable Packages: 2005 SP1 x86, 2017 x64, 2017 x86, 2010 X86, 2010 SP1 x64 Install Installation Successful	
Motologiy		
Metalogix	< Back Next >	Cancel

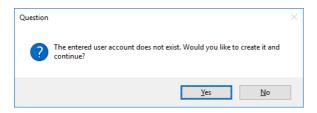
If one or more prerequisites are missing, the **Next** button is disabled. Click **Install** to install each prerequisite.

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

leader Installation Wi	zard	×
WELCOME PLANNING	Superuser Account	<u>Help</u>
INSTALLATION TOOLS SETUPS	It is important to specify an account under which Metalogix services will be running. It must be a local administrator and must have admin rights on Archive Manager's databases and Exchange server. If you have more than one Exchange server in the domain, then this user should exist on the server with the newer version of Exchange. Please specify the credentials for this account. Superuser name (domain/user): DEMOCORP/mamadmin Password:	
Metalogix	< Back Next > C	ancel

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 V	Vizard			×
WELCOME	Database Server Connection			<u>Help</u>
PLANNING INSTALLATION	Please fill in all values which will be used to create	a connection to your Database Se	erver.	
TOOLS	Component		DB Server	
SETUPS	HSM		MSSQL	
	Archive Manager Search		MSSQL	
	Archive Manager Post-Processing		MSSQL	
	 ▲↓ □ ✓ Authentication 			
	Authentication UserLogin Password	Integrated Windo	ows Authentication	
	Server instance TableOwner ServerName DatabaseName Provider ServerName	dbo AMXDB MAMHSM MSOLEDBSQL		
	Database instance server name			
Metalogix			< 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

- a. Authentication database authentication method.
- b. UserLogin Username if SQL Authentication or Oracle client is selected. Otherwise this field is disabled.
- c. **Password** Database password if **SQL Authentication** or **Oracle client** is selected. Otherwise this field is disabled.
- d. **TableOwner** Username of the installer account without the domain prefix. For example **dbo**.
- e. **ServerName** The name of the server where you are installing the HSM and Archive Manager Search.
- f. **DatabaseName** The name of the database that will contain the HSM metadata. The default name is **MAMHSM**.
- g. **Provider** The SQL Server database communication library. The choices for the provider are:

For SQL Server

• MSOLEDBSQL - Microsoft OLE DB Driver for SQL Server recommended by Microsoft. This is the default provider.

- 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

- a. Oracle net name net service name that describes the network address of the database server in your tnsnames.ora file.
- b. Schema name of the Oracle schema from your tnsnames.ora file.
- c. User name database login user name.
- d. Password password of the database user.
- e. **Provider** The Oracle database communication library (eg. OraOLEDB Oracle).
- 13. From the *Component* column, select **Archive Manager Search** and verify the database parameter values.
- 14. From the *Component* column, select **Archive Manager Post-Processing** and verify the database parameter values.
- **NOTE:** When you specify the HSM database parameter values, they are carried over to the database specification for each feature in the list. While the features will be installed on the same server, the database to host the metadata for each feature can be on a different server and the database specifications section for each feature can be customized accordingly.
- 15. Click Next. The Hierarchical Storage Manager Settings window opens.

line Manager Installation Wi	izard	×	
WELCOME	Hierarchical Storage Manager Settings	<u>Help</u>	
PLANNING			
INSTALLATION	The Hierarchical Storage Manager (HSM) stores the archived content of files. The HSM also manages the Single Instance Function so that indentical files are stored only once no matter how many times they		
TOOLS	occur in the file system.		
SETUPS			
	Local HSM installation HSM server: AMXHSM		
	Store name: FilesStore Schema name: FilesSchema	_ ۱	
	Please select a location for the HSM folder which is large enough to handle all of the content you wish to archive.	_	
	Store folder: C:\HSM Browse		
Metalogix	< Back Next > Can	ıcel	

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.

l Archive Manager Installation Wi	zard	×
WELCOME	Archive Manager Search Settings	<u>Help</u>
PLANNING		
INSTALLATION	Search server: AMXHSM	
TOOLS	Search index folder:	
SETUPS	To keep the default folder click Next. To specify a different folder click Browse.	
	For emails: C:\Program Files (x86)\Metalogix\MAMSearch\Index\Mail Browse	
	For files: C:\Program Files (x86)\Metalogix\MAMSearch\Index\File Browse	
Metalogix	< Back Next > C	ancel

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.

Archive Manager Installation Wi	izard	×
WELCOME	Firewall Settings	<u>Help</u>
PLANNING		
INSTALLATION	Allow programs to communicate through Windows Firewall	
TOOLS	Allow programs to communicate through windows niewait	
SETUPS		
Metalogix	< Back Next > Ca	ancel

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.

Archive Manager Installation W	fizard	×
WELCOME	Summary Installation	Help
PLANNING	This is the installation summary.	
INSTALLATION	Components to be installed:	<u>^</u>
TOOLS		
SETUPS	Product name: HSM Version: 8.3.0.169 HSM schema name: FilesSchema HSM store name: FilesStore HSM store path: C:\HSM	
	Product name: Archive Manager Search Version: 8.3.0.169 Search provider: PAMSEARCH Search index folder (AM for Exchange): C:\Program Files (x86)\Metalogix\MAMSearch\Index\Mail Search index folder (AM for Files): C:\Program Files (x86)\Metalogix\MAMSearch\Index\File	
	Installation folder: C:\Program Files (x86)\Metalogix	
		>
Metalogix	< Back Install > C	ancel

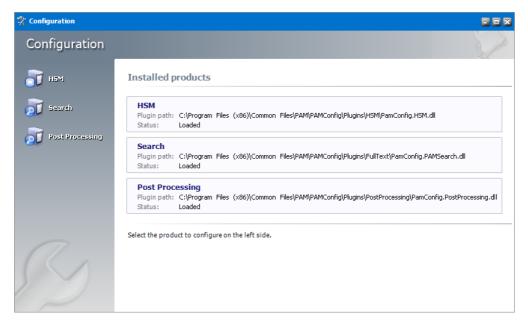
Archive Manager Installatio	n Wizard	
WELCOME	Installation	Heir
PLANNING		
NSTALLATION	DCOM access and launch permissions	Completed
TOOLS	HSM installation	Completed
SETUPS	Archive Manager Search installation	Completed
	Archive Manager Post-Processing installation	📀 Completed
	Starting services	Completed
Aetalogia	ĸ	Finish

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* widow opens and the **Database** tab is displayed by default.

🞇 Configuration						
Configure HSM	Datab	oase Stores	Advanced	Diagnostics	Encryption Packer T	asks
🕡 н5м 🕨 🕨	Provider:	ection Microsoft SQ	Server			
🔊 Search	Server name:	AMXDB				
Post Processing	Initial catalog: Table owner: User name:	MAMHSM dbo (Windows Au	thentication	,		
	Scripts	(1111001374		,	Configure	
	Database version: Scripts version:	8.2.0.37 8.2.0.37				
ß	Vour database				Execute scripts	

Verify that the values are as expected.

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

🛠 Configuration	
Configure HSM	Database Stores Advanced Diagnostics Encryption Packer Tasks
in HSM Francisco	Stores Id Name Server Mirror of State 1 FILESSTORE AMXHSM
Post Processing	<
R S	Schemas Id Name Store Server Force Store Encryption Key Compression Task 1 FilesSchema FILESSTORE AMXHSM yes
	< >> Create Z Edit Delete Test Refresh

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.

🞇 Configuration				
Configure Sear	ch		Database	Search Scopes Connectivity
🗃 нэм	Database com	≥ction		
	Provider:	Microsoft SQL Server		
Search 🕨 🕨	Server name:	AMXDB		
R	Initial catalog:	MAMSEARCH		
🔊 Post Processing	Table owner:	dbo		
	User name:	(Windows Authentication)		
				Configure
	Scripts			
	Database version:	8.2.0.3		
	Scripts version:	8.2.0.3		
	🥝 Your database	is up to date.		
				Execute scripts

Verify that the values are as expected.

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

🞇 Configuration		
Configure Post	Processing	Database General Settings Exchange Files OCR Engine
ism 🕡	😼 Database conne	ection
页 Search	Provider: Server name:	Microsoft SQL Server AMXDB
Post Processing 🕨	Initial catalog: Table owner:	MAMINDEX dbo
	User name:	(Windows Authentication) Configure
Ŋ	Database version: Scripts version:	8.2.0.12 8.2.0.12
	🥝 Your database i	is up to date. Execute scripts

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.

Configuration					
Incomplete configuration					
Not properly configured plugins were found:					
Search • There are no search scopes defined.					
Do you really want to quit the configuration?					
Yes No					

- 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.

File Action Yew Help Computer Management (Local Yeystem Tools Yeystem Tools <th>Computer Management</th> <th></th> <th></th> <th>– 🗆 X</th>	Computer Management			– 🗆 X		
 Computer Management (Local) System Tools Task Scheduler System Tools System Management Sperices and Applications Sperices and Application in a domain Sperices of this group are managed by						
 Computer Management (Local) Computer Management (Local) System Tools Task Scheduler Event Viewer Starde Folders Local Users and Groups Users Groups More Actions Market Service DC Members of this group are allowed to connect to Certific the Service OF Users of this group are allowed to connect to Certific the Service OF Users Strate Ranager Strate Management Windows Server Backup Services and Applications Members of this group and event logs from local moders of the Users of this group and event logs from local moders of the Users of Members of Remote Active Active						
 System Tools Task Scheduler Task Scheduler						
 Task Scheduler Task Scheduler<td></td><td>Name</td><td>Description</td><td colspan="3">Actions</td>		Name	Description	Actions		
 Administrators Administrators Administrators Administrators Backup Operators Certificate Service DC Members of this group are allowed to connect to Certific Cryptographic Operat Members of this group can read event logs from local m Device Manager Borrage Windows Server Backup Disk Management Services and Applications Remote Ontor Members of this group can read event logs from local m Members of this group nay schedule logging of perform Members of this group may schedule logging of perform Members of this group may schedule logging of perform Members of this group can reade event logs from local m Members of this group may schedule logging of perform Members of this group may schedule logging of perform Members of this group can access performance counter Power Users Performance Monitor Members of this group can perform routine administrative pri Power Users Power Users Power Users Power Users Power Users Servers in this group can perform routine administrative RDS Endpoint Servers Servers in this group are granted the right to logon rer Remote Management Members of this group are cances over n Remote Management Servers in this group are cances over n Remote Management Servers in this group are cances over n Remote Management System Managed Acc Wembers of this group are managed by the system<td>00 2</td><td>Access Control Assist</td><td>Members of this group can remotely query authorization</td><td>Groups 🔺</td>	00 2	Access Control Assist	Members of this group can remotely query authorization	Groups 🔺		
 Shared folders Local Users and Groups Users Corptographic Operat Members are authorized to perform cryptographic opera Members are authorized to perform cryptographic opera Distributed COM Users Windows Server Backup Storage Windows Server Backup Disk Management Services and Applications Reptrance Monitor Restore Admangement Services and Applications Services and Applications Members of this group can access performance counter Power Users Pomer Users Performance Cay Users Remote Desktop Users Remote Desktop Users Remote Desktop Users Storage Replicator Members of this group can access performance counter Power Users are included for backwards compatibility ar Members of this group run virtual machines and host sessions Storage Replicator Storage Replicator Storage Replicator Storage Replicator Storage Replica Admin Members of this group are managed by the system. Users 				I More Actions		
Users Wembers are authonized to perform cryptographic operation in a domain More Actions Image: Storage Distributed COM Users Members are authonized to perform cryptographic operation in a domain More Actions Image: Storage Image: Storage More Actions More Actions Image: Storage Image: Storage More Actions Members are authonized to perform access as members of the Users gr Image: Storage Image: Storage Members for this group have complete and unrestricted is group can have some administrative pri Image: Storage Image: Storage Members of this group can have some administrative pri Image: Storage Members of this group can access performance counter Image: Storage Members of this group can access performance counter Image: Storage Members of this group can access performance counter Image: Storage Members of this group can access performance counter Image: Storage Members of this group can access performance counter Image: Storage Members of this group can access performance counter Image: Storage Members of this group can access performance counter Image: Storage Power Users Members of this group can access of RemoteApp program Image: Storage Serve	- Ga	Certificate Service DC	Members of this group are allowed to connect to Certific	Administrators		
	 Users Groups > (♥) Performance ▲ Device Manager ✓ (➡) Storage > (♥) Windows Server Backup ➡ Disk Management 	Cryptographic Operat Distributed COM Users Distributed COM Users Event Log Readers Guests Hyper-V Administrators Its JUSRS Network Configuratio Performance Log Users Performance Monitor Power Users Print Operators RDS Endpoint Servers RDS Management Ser RDS Remote Access S Replicator System Managed Acc System Managed Acc	Members are authorized to perform cryptographic opera Members are allowed to launch, activate and use Distribu Members of this group can read event logs from local m Guests have the same access as members of the Users gr Members of this group have complete and unrestricted i Built-in group used by Internet Information Services. Members in this group can have some administrative pri Members of this group can access performance counter Power Users are included for backwards compatibility ar Members are included for backwards compatibility ar Members in this group can perform notine administrative Servers in this group can perform routine administrative Servers in this group and perform routine administrative Servers in this group and perform routine administrative Servers in this group and perform routine administrative Servers in this group can access WMI resources over in Supports file replication in a domain Members of this group are managed by the system. Users are prevented from making accidental or intention	More Actions		
		`	,	J		

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

Administrators Pro	operties			?	×				
General									
Administrators									
Description:	ption: Administrators have complete and unrestricted access to the computer/domain								
Members: Constant Admins Constant Admins Constant Admins Constant Admine Constant Admine Members: M									
Add Remove Changes to a user's group membership are not effective until the next time the user logs on.									
	ОК	Cancel	<u>A</u> pply	He	lp.				

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: Integrated Windows Authentication or SQL Authentication	Integrated Windows Authentication

UserLogin	Username if <i>SQL Authentication</i> is selected	dbadmin
Password	Database password if SQL Authentication 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

- 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.

Archive Manager Installation Pa	sckage	×
WELCOME	Server Installation	elp
PLANNING		
INSTALLATION	Software Transaction Agreement	^
TOOLS	PLEASE READ THIS AGREEMENT CAREFULLY BEFORE USING THIS PRODUCT. BY DOWNLOADING, INSTALLING OR US THIS PRODUCT, YOU ACCEPT AND AGREE TO THE TERMS AND CONDITIONS OF THIS AGREEMENT. FOR ORDERS PLAC	
SETUPS	OUTSIDE THE UNITED STATES OF AMERICA, PLEASE GO TO http://guest.com/legal/sta.aspx TO VIEW THE APPLICAE VERSION OF THIS AGREEMENT FOR YOUR REGION. IF YOU DO NOT AGREE TO THE TERMS AND CONDITIONS OF T AGREEMENT OR THE APPLICABLE VERSION OF THIS AGREEMENT FOR YOUR REGION, DO NOT DOWNLOAD, INSTALL USE THIS PRODUCT. IF YOU HAVE A SIGNED AGREEMENT WITH PROVIDER THAT IS SPECIFICALLY REFERENCED IN ORDER THAT IS EXECUTED BETWEEN YOU AND PROVIDER, THEN THAT SIGNED AGREEMENT WILL SUPERSEDE T AGREEMENT.	BLE HIS OR AN
	This Software Transaction Agreement (the "Agreement") is made between you, the Customer ("Customer" or "You") and Provider, as defined below.	the
	1. Definitions. Capitalized terms not defined in context shall have the meanings assigned to them below:	
	(a) "Affiliate" means any legal entity controlling, controlled by, or under common control with a party to this Agreement, for long as such control relationship exists.	so
	(b) "Appliance" means a computer hardware product upon which the Software is pre-installed and delivered.	
	(c) "Documentation" means the user manuals and documentation that Provider makes available for the Software, and copies of the foregoing.	l all
	(d) "eStore" means Provider's online Software ordering system located at http://guest.com/shop/.	
	(e) "License Entitlements" means the quantities and versions of Products licensed to Customer, the new versions	and Y
	☑ I accept the terms of the license agreement.	
Metalogix	Next > Cance	el .

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

Archive Manager Installation Pa	ckage	×
WELCOME	Installation Mode	<u>Help</u>
PLANNING		
INSTALLATION	Please select which type of installation would like to run:	
TOOLS		
SETUPS		
	Advanced installation	
	O Upgrade	
Metalogix	< Back Next > Ca	ancel

7. Click Next. The Installation Components window opens.

Archive Manager Installation Wi	ïzard	×
WELCOME PLANNING	Installation Components	<u>Help</u>
INSTALLATION TOOLS SETUPS	Component	Installed version
Metalogix	Product description: Reduce the storage footprint of your email archives without the complexity. Archive parallel messages in real time, as needed, to on-premises, hybrid or cloud locations. Users can search through archived emails and restore them in one-click. Installation folder: C:\Program Files (x86)\Metalogix	Browse

Select Archive Manager for Exchange.

NOTE: i

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.

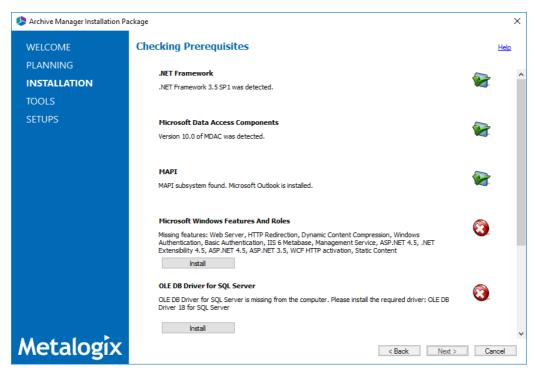
ArchiveWeb is an enhancement. Installation of ArchiveWeb is described in the *Metalogix*[®] *Archive Manager for Exchange ArchiveWeb Manual*.

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

schive Manager Installation W	izard	×
WELCOME	Database Engine	<u>Help</u>
PLANNING		
INSTALLATION	Archive Manager and its related applications can store metadata in various database engines. Please select the database engine you would like to use.	
TOOLS	riease select the database engine you would like to use.	
SETUPS	Microsoft SQL Server	
	Azure SQL Server	
	O Oracle	
Metalogix	< Back Next >	Cancel

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.

Activate	License Key	×
Q	Enter license key and select the activation method	
	License key:	
	Activation mode:	
	 Online activation (requires online internet connection) 	
	O Offline activation	
	Set proxy	
	< Back Next > Close	

If you are connected to the internet, select **Online activation** or see <u>License Activation</u> 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.

l Archive Manager Installation Wi	izard	×
WELCOME	Superuser Account	<u>Help</u>
PLANNING		
INSTALLATION	It is important to specify an account under which Metalogix services will be running. It must be a local administrator and mu	
TOOLS	have admin rights on Archive Manager's databases and Exchange server. If you have more than one Exchange server in the domain, then this user should exist on the server with the newer version of Exchange. Please specify the credentials fo this account.	
SETUPS	Superuser name (domain\user): DEMOCORP\mamadmin	
	Password:	
	Re-type password:	
Metalogix	< Back Next >	Cancel

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

station W	izard			×
WELCOME	Database Server Connection			<u>Help</u>
PLANNING INSTALLATION	Please fill in all values which will be used to create a connection to	o your Database S	erver.	
TOOLS	Component		DB Server	
SETUPS	Archive Manager for Exchange		MSSQL	
	Archive Manager Multitenant		MSSQL	
	Archive Manager Auditing		MSSQL	
	2↓ □ ✓ Authentication Artheritication	late and a Mind	ows Authentication	
	UserLogin Password	integrated wind	ows Authentication	
	Server instance TableOwner ServerName DatabaseName Provider ServerName	dbo AMXDB MAMEXCH MSOLEDBSQL		
	Database instance server name			
Metalogix			< Back	Next > Cancel

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

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

- a. Authentication database authentication method.
- b. UserLogin Username if SQL Authentication or Oracle client is selected. Otherwise this field is disabled.
- c. **Password** Database password if **SQL Authentication** or **Oracle client** is selected. Otherwise this field is disabled.
- d. **TableOwner** Username of the installer account without the domain prefix. For example **dbo**.
- e. **ServerName** The name of the server where you are installing the HSM and Archive Manager Search.
- f. **DatabaseName** The name of the database that will contain the HSM metadata. The default name is **MAMHSM**.
- g. **Provider** The SQL 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

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

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

l Archive Manager Installation Wi	zard		×
WELCOME	Hierarchical Storage Manager Settings		<u>Help</u>
PLANNING			
INSTALLATION	The Hierarchical Storage Manager (HSM) stores the archived content of files. The HSM also manages the Single Instance Function so that indentical files are stored only once no matter how many times they occur in the file system.		
TOOLS			
SETUPS	HSM settings for installed components		
	Component	HSM server name	
	Archive Manager for Exchange	AMXHSM	
Metalogix		< Back Next > Ca	ncel

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

Archive Manager Installation W	fizard	×
WELCOME	Archive Manager Search Settings	Help
PLANNING		
INSTALLATION	Search server: AMXHSM	
TOOLS		
SETUPS		
Metalogix		< Back Next > Cancel

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.

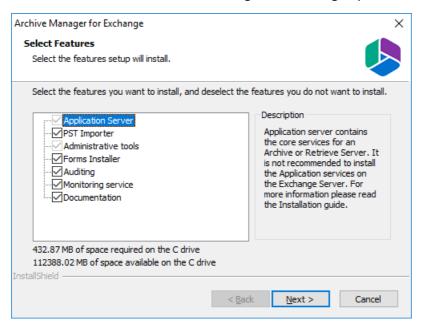
Archive Manager Installation Wizard			
WELCOME	Firewall Settings	<u>Help</u>	
PLANNING			
INSTALLATION	☑ Allow programs to communicate through Windows Firewall		
TOOLS	Price programs to communicate mough windows mewain		
SETUPS			
Metalogix	< Back Next > Ca	ancel	

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.

Archive Manager Installation Wi	zard	×
WELCOME PLANNING INSTALLATION TOOLS SETUPS	Summary Installation This is the installation summary. Components to be installed: Product name: Archive Manager for Exchange Version: 8.3.0.198 Installation folder: C:\Program Files (x86)\Metalogix	
		~
	Manage the Organizational Forms Library	
	Start Metalogix Archive Manager for Exchange	
Metalogix	< Back Install > Ca	ancel

- 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.

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.

Archive Manager Installation W	īzard		×
WELCOME PLANNING	Installation	He	<u>lo</u>
INSTALLATION	DCOM access and launch permissions	Completed Completed	~ ~
TOOLS SETUPS	Archive Manager Multitenant	Completed	~
	Archive Manager Auditing Starting services	Completed Completed	~ ~
Metalogix		Finish	

- 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. For advanced installation, Address Book setup can be done at a later step. For more information see <u>Setup</u> 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.

Archive Manager for Exchange			
Session View Tools Help			
🗗 🖻 🖻 🖻 X D 🗞 🏹 🛛) 🥬 💐 🛢		
Groups Settings Public Folders Jo			
Set filter Clear filter			
Group name Alias	Property	Value	
🍥 🇊 Server Role: Archive Server	Loaded	FullAccess N	lanager

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.

🞇 Configuration		
Configuration		12/
auditing	Installed products	
😈 Users	Auditing Plugin path: C:\Program Files (x86)\Common Files\PAM\PAMConfig\Plugins\PAMAuditing\PamConfig.Auditing.dll Status: Loaded	
Texchange Archive	Users Plugin path: C:\Program Files (x86)\Common Files\PAM\PamConfig\Plugins\MultiTenant\PamConfig.MultiTenant.dll Status: Loaded	
	Exchange Archive Plugin path: C:\Program Files (x86)\Common Files\PAM\PamConfig\Plugins\PAM4Exchange\PamConfig.ExchangePam.dll Status: Loaded	
Ŋ	Select the product to configure on the left side.	

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

🛠 Configuration			
Configure Aud	liting		Database Connection Logtargets
Auditing	Database conne		
🗊 Users	Provider: Server name:	Microsoft SQL Server AMXDB	
The sector of th	Initial catalog: Table owner:	MAMAUDIT dbo	
	User name:	(Windows Authentication)	Configure
	Scripts		
	Database version: Scripts version:	8.3.0.27 8.3.0.27	
	🥝 Your database	s up to date.	Execute scripts

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.

% 0	onfig	guration					
C	on	figure U	sers	5		Database	SMTP Configuration
	7	Auditing	I	😼 Database conne		Database	SMIP Configuration
	B			Provider:	Microsoft SQL Server		
	D	Users		Server name:	AMXDB		
		Exchange		Initial catalog:	MAMUSER		
	U	Exchange Archive		Table owner:	dbo		
				User name:	(Windows Authentication)		
							Configure
				Construction Scripts			
				Database version:	8.3.0.32		
				Scripts version:	8.3.0.32		
11.		🥝 Your database is	s up to date.				
5							Execute scripts

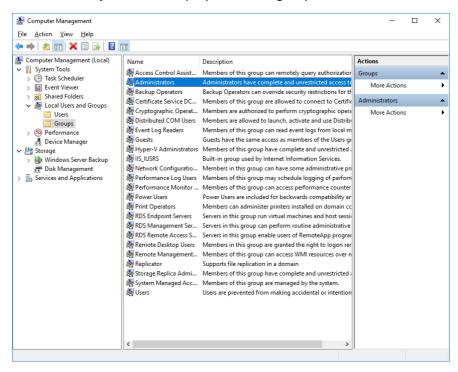
Verify that the values are as expected.

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

😤 Configuration			
Configure Excha	ange Archive		Database
Auditing Users Exchange	Database conne Provider: Server name: Initial catalog: Table owner:	ction Microsoft SQL Server AMXDB MAMEXCH dbo	Database
	User name: Scripts Database version:	(Windows Authentication) 8.3.0.173	Configure
Ŋ	Scripts version:	8.3.0.173	Execute scripts

Verify that the values are as expected.

- 6. Close the *Configuration* wizard.
- 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.

Administrators Properties		?	×
General			
Administrators			
Description: Administrators have to the computer/dom	complete and unrestrict nain	ed acce	ess
Members: DEMOCORP\domadmin BenocoRP\Domain Admins DEMOCORP\mamadmin Member domadmin			
Add Remove are	nges to a user's group r not effective until the ne r logs on.		
OK Cance	<u>A</u> pply	He	elp

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:

- <u>Worksheet for this installation</u>
- Steps to install Metalogix Archive Manager for Exchange
- <u>Steps to configure and verify the Retrieve server</u>

Worksheet for this installation

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

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

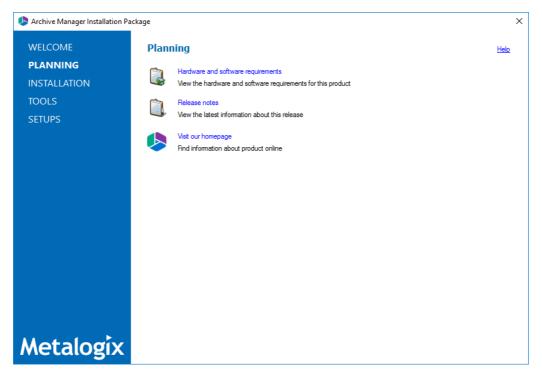
	don't have a license key, contact your Quest representative.	neither an active nor an expired license key)
Archive manager for Exchange server	The server where the Archive Manager for Exchange will be installed with the <i>Retrieve</i> role.	AMXSERVER-R
Installer account	Windows account that is used 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: Integrated Windows Authentication or SQL Authentication	Integrated Windows Authentication
UserLogin	Username if SQL Authentication is selected	dbadmin
Password	Database password if SQL Authentication 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

- 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.

Archive Manager Installation	Package	×
WELCOME	Server Installation	lelp
PLANNING		
INSTALLATION	Software Transaction Agreement	^
TOOLS	PLEASE READ THIS AGREEMENT CAREFULLY BEFORE USING THIS PRODUCT. BY DOWNLOADING, INSTALLING OR US THIS PRODUCT, YOU ACCEPT AND AGREE TO THE TERMS AND CONDITIONS OF THIS AGREEMENT. FOR ORDERS PLAC	
SETUPS	OUTSIDE THE UNITED STATES OF AMERICA, PLEASE GO TO <u>http://guest.com/lega/ista.aspx</u> TO VIEW THE APPLICAE VERSION OF THIS AGREEMENT FOR YOUR REGION. IF YOU DO NOT AGREE TO THE TERMS AND CONDITIONS OF T AGREEMENT OR THE APPLICABLE VERSION OF THIS AGREEMENT FOR YOUR REGION, DO NOT DOWNLOAD, INSTALL USE THIS PRODUCT. IF YOU HAVE A SIGNED AGREEMENT WITH PROVIDER THAT IS SPECIFICALLY REFERENCED IN ORDER THAT IS EXECUTED BETWEEN YOU AND PROVIDER, THEN THAT SIGNED AGREEMENT WILL SUPERSEDE T AGREEMENT.	BLE HIS OR AN
	This Software Transaction Agreement (the "Agreement") is made between you, the Customer ("Customer" or "You") and Provider, as defined below.	the
	1. Definitions. Capitalized terms not defined in context shall have the meanings assigned to them below:	
	(a) "Affiliate" means any legal entity controlling, controlled by, or under common control with a party to this Agreement, for long as such control relationship exists.	' S O
	(b) "Appliance" means a computer hardware product upon which the Software is pre-installed and delivered.	
	(c) "Documentation" means the user manuals and documentation that Provider makes available for the Software, and copies of the foregoing.	j all
	(d) "eStore" means Provider's online Software ordering system located at http://guest.com/shop/ .	
	(e) "License Entitlements" means the quantities and versions of Products licensed to Customer, the new versions	and 🗡
	☑ I accept the terms of the license agreement.	
Metalogix	Next > Cance	əl

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

S Archive Manager Installation Package				
WELCOME	Installation Mode	<u>Help</u>		
PLANNING				
INSTALLATION	Please select which type of installation would like to run:			
TOOLS				
SETUPS	O Express installation			
	Advanced installation			
	O Upgrade			
Metalogix	< Back Next > C	ancel		

7. Click Next. The Installation Components window opens.

Archive Manager Installation Wi	zard	×
WELCOME PLANNING	Installation Components	<u>Help</u>
INSTALLATION TOOLS SETUPS	Component	nstalled ersion
	ArchiveWeb 8.3.0.198	
Metalogix	Product description: Reduce the storage footprint of your email archives without the complexity. Archive parallel messages in real time, as needed, to on-premises, hybrid or cloud locations. Users can search through archived emails and restore them in one-click. Installation folder: C:\Program Files (x86)\Metalogix	Browse

Select Archive Manager for Exchange.

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

Archive Manager Installation W	fizard	×
WELCOME	Database Engine	<u>Help</u>
PLANNING		
INSTALLATION	Archive Manager and its related applications can store metadata in various database engines. Please select the database engine you would like to use.	
TOOLS		
SETUPS	Microsoft SQL Server	
	Azure SQL Server	
	O racle	
Metalogix	< Back Next >	Cancel

Select either Microsoft SQL Server or Oracle.

9. Click Next. The Checking Prerequisites window opens.

l Archive Manager Installation Pa	ckage	>	ĸ
WELCOME	Checking Prerequisites	Help	
PLANNING INSTALLATION	.NET Framework .NET Framework 3.5 SP1 was detected.		^
TOOLS	INET Framework 3.5 SF1 was detected.		
SETUPS	Microsoft Data Access Components Version 10.0 of MDAC was detected.		
	MAPI MAPI subsystem found. Microsoft Outlook is installed.		
	Microsoft Windows Features And Roles Missing features: Web Server, HTTP Redirection, Dynamic Content Compression, Windows Authentication, Basic Authentication, IIS 6 Metabase, Management Service, ASP.NET 4.5, .NET Extensibility 4.5, ASP.NET 4.5, ASP.NET 3.5, WCF HTTP activation, Static Content Install	3	
	OLE DB Driver for SQL Server OLE DB Driver for SQL Server is missing from the computer. Please install the required driver: OLE DB Driver 18 for SQL Server	3	
Metalogix	Install < Back Next >	Cancel	*

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.

Activate	License Key	×
Q	Enter license key and select the activation method	
	License key:	
	Activation mode:	
	 Online activation (requires online internet connection) 	
	O Offline activation	
	<u>Set proxy</u>	
	< Back Next > Close	

If you are connected to the internet, select **Online activation** or see <u>License Activation</u> 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.

Archive Manager Installation Wi	zard	×
WELCOME PLANNING	Superuser Account	<u>Help</u>
INSTALLATION TOOLS SETUPS	It is important to specify an account under which Metalogix services will be running. It must be a local administrator and must have admin rights on Archive Manager's databases and Exchange server. If you have more than one Exchange server in the domain, then this user should exist on the server with the newer version of Exchange. Please specify the credentials for this account. Superuser name (domain/user): DEMOCORP/mamadmin Password: Re-type password:	
Metalogix	< Back Next > Ca	incel

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

stallation W	izard			×
WELCOME	Database Server Connection			<u>Help</u>
PLANNING INSTALLATION	Please fill in all values which will be used to create a connection to	o your Database S	erver.	
TOOLS	Component		DB Server	
SETUPS	Archive Manager for Exchange		MSSQL	
	Archive Manager Multitenant		MSSQL	
	Archive Manager Auditing		MSSQL	
	2↓ □ ✓ Authentication Artheritication	late and a Mind	ows Authentication	
	UserLogin Password	integrated wind	ows Authentication	
	Server instance TableOwner ServerName DatabaseName Provider ServerName	dbo AMXDB MAMEXCH MSOLEDBSQL		
	Database instance server name			
Metalogix			< Back	Next > Cancel

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

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

- a. Authentication database authentication method.
- b. UserLogin Username if SQL Authentication or Oracle client is selected. Otherwise this field is disabled.
- c. **Password** Database password if **SQL Authentication** or **Oracle client** is selected. Otherwise this field is disabled.
- d. **TableOwner** Username of the installer account without the domain prefix. For example **dbo**.
- e. **ServerName** The name of the server where you are installing the HSM and Archive Manager Search.
- f. **DatabaseName** The name of the database that will contain the HSM metadata. The default name is **MAMHSM**.
- g. **Provider** The SQL 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

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

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

Archive Manager Installation Wi	zard		×
WELCOME	Hierarchical Storage Manager Settings		<u>Help</u>
PLANNING			
INSTALLATION	The Herarchical Storage Manager (HSM) stores the archived content of files. The HSM also manages the Single Instance Function so that indentical files are stored only once no matter how many times they occur in the file system.		
TOOLS	HSM settings for installed components		
SETUPS	Component	HSM server name	
	Archive Manager for Exchange	AMXHSM	
Metalogix		< Back Next > Ca	ncel

Specify the parameter values as described below:

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

Archive Manager Installation W	izard	×
WELCOME	Archive Manager Search Settings	<u>Help</u>
PLANNING		
INSTALLATION	Search server: AMXHSM	
TOOLS		
SETUPS		
Metalogix	< Back Next > C	Cancel

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

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.

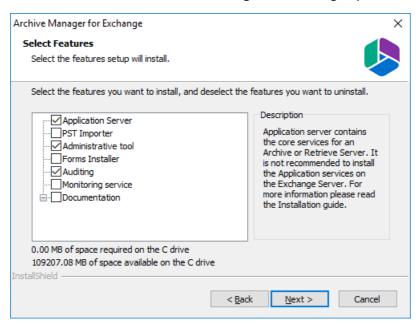
Archive Manager Installation Wi	izard	×
WELCOME	Firewall Settings	<u>Help</u>
PLANNING		
INSTALLATION	Allow programs to communicate through Windows Firewall	
TOOLS	Priore programs to communicate unough remotes a newall	
SETUPS		
Metalogix	< Back Next > C	ancel

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.

leader Installation Wi	izard	×
WELCOME PLANNING	Summary Installation	<u>Help</u>
INSTALLATION TOOLS	This is the installation summary. Components to be installed:	^
SETUPS	Product name: Archive Manager for Exchange Version: 8.3.0.198 Installation folder: C:\Program Files (x86)\Metalogix	
	Manage the Organizational Forms Library Start Metalogix Archive Manager for Exchange	~
Metalogix	< Back Install > C	ancel

- 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.

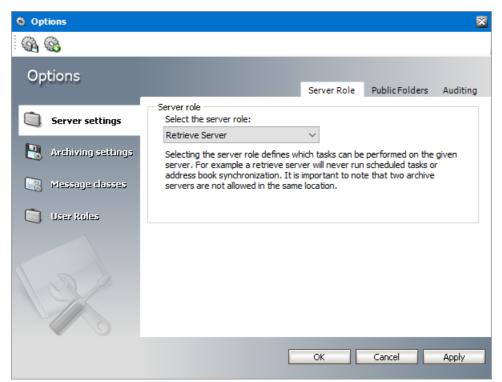
18. Click **Next** to continue the installation. If a feature installation fails or completes with a warning, expand the row to view and address the problem.

Archive Manager Installation Wi	izard		×
WELCOME PLANNING	Installation	<u>He</u>	Þ
INSTALLATION	DCOM access and launch permissions	Completed	~
TOOLS SETUPS	Archive Manager for Exchange installation Image: Comparison of the stallation Archive Manager Multitenant installation Image: Comparison of the stallation	Completed Completed	~ ~
SEIGIS	Archive Manager Auditing installation	Completed	\sim
	Starting services	Completed	\sim
Metalogix		Finish	

- 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.

Archive Manager for Exc	change			
Session View Tools	s Help			
🖻 🖻 🖻 🛍 🗙 D	S S 🛛 🕬	Q 🔋		
Groups Settings Publ	lic Folders Jobs	Retention Locations		
Set filter Clear	r filter			
Group name Alia	as	Property	Value	
🙆 🏮 🐨 Server Role: Ret	trieve Server	Loaded	FullAccess	Manager

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.

🛠 Configuration		
Configuration		P
🛐 Users	Installed products	
archive	Users Plugin path: C:\Program Files (x86)\Common Files\PAM\PamConfig\Plugins\MultiTenant\PamConfig.MultiTenant.dll Status: Loaded	
	Exchange Archive Plugin path: C:\Program Files (x86)\Common Files\PAM\PamConfig\Plugins\PAM4Exchange\PamConfig.ExchangePam Status: Loaded	ı.dll
	Select the product to configure on the left side.	
	<	>

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

🛠 Configuration				
Configure Users	5		Database	SMTP Configuration
Users	Provider: Server name: Initial catalog: Table owner:	ection Microsoft SQL Server AMXDB MAMUSER dbo		
	User name: Scripts Database version:	(Windows Authentication)	[Configure
Ry.	Scripts version:	8.2.0.30		Execute scripts

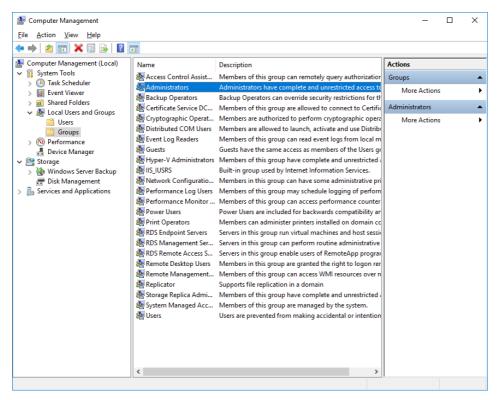
Verify that the values are as expected.

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

😤 Configuration			
Configure Exch	ange Archive		Database
U sers	Provider:	eciton Microsoft SQL Server	
Exchange Archive	Server name:	AMXDB	
	Initial catalog:	MAMEXCH	
	Table owner:	dbo	
	User name:	(Windows Authentication)	
			Configure
	Scripts		
	Database version:	8.2.0.140	
	Scripts version:	8.2.0.140	
CLA	🥝 Your database	is up to date.	
			Execute scripts

Verify that the values are as expected.

- 8. Close the *Configuration* wizard.
- 9. Open Start > Windows Administrative Tools > Computer Management. The Computer Management console opens.
- 10. From the Console Tree, expand Local Users and Groups.
- 11. 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.

Administrators Pro	operties			?	×
General					
Admini:	strators				
D <u>e</u> scription:	Administrato to the comp		ete and unrestrict	ted acce	ess
Members:					_
CEMOCORI Remocori Democori Democori	P\Domain Adn	nins			
🍠 domadmin					
Add Remove Changes to a user's group membership are not effective until the next time the user logs on.					
	ОК	Cancel	<u>A</u> pply	He	elp

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 <u>Advanced Installation</u> 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 <u>Deployment Plan</u>.

In this chapter:

- Setup the Superuser Account
- Modify the Exchange server throttling policy
- <u>Setup the Organizational Forms Library</u>
- <u>Prepare the Metalogix Archive Manager for Exchange Servers</u>
 - o Steps to download the install media
 - o Steps to install the prerequisites
 - o Steps to assign DCOM access and launch permissions
 - o Steps to install Microsoft Outlook
- Install Metalogix Archive Manager for Exchange
 - o Install HSM
 - o Install Archive Manager Search
 - o Install the Archive server
 - o Install the Retrieve server
- **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. <u>Steps to add the superuser to the Administrators group in feature servers</u>
- 4. <u>Steps to add the superuser as a database user with sysadmin role</u> (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	
<u>F</u> irst name:	MAM <u>I</u> nitials:	
Last name:	Administrator	
Full n <u>a</u> me:	MAM Administrator	
User logon name:		
mamadmin	@democorp.com ~	
User logon name (pre	- <u>W</u> indows 2000):	
DEMOCORP\	mamadmin	
	< <u>B</u> ack <u>N</u> ext > Ca	ancel

- 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.

New Object -	User	×
🤱 c	reate in: democorp.com/Users	
When you cl	ick Finish, the following object will be created:	
Full name: N	IAM Administrator	~
User logon r	name: mamadmin@democorp.com	
The passwo	rd never expires.	
		\sim
	< <u>B</u> ack Finish C	ancel

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.

Connection Settings ×		
Name: Configuration		
Path: LDAP://AMXDC.sales.democorp.com/Configuration		
Connection Point		
○ Select or type a <u>D</u> istinguished Name or Naming Context:		
~		
Select a well known Naming Context:		
Configuration \checkmark		
Computer		
O Select or type a domain or server: (Server Domain [:port])		
✓		
Default (Domain or server that you logged in to)		
Use SSL-based Encryption		
Ad <u>v</u> anced OK Cancel		

- 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.

Select Users, Computers, Service Accounts, or Groups	×
Select this object type: Users, Service Accounts, or Groups	Object Types
From this location:	
democorp.com/Users	Locations
Enter the object names to select (<u>examples</u>):	
MAM Administrator (mamadmin@democorp.com)	Check Names
Advanced OK	Cancel

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

CN=Configuration DC=sales,DC=democorp,DC=com Pro	?	×
Attribute Editor Security		
Group or user names:		
Domain Admins (SALES\Domain Admins) Enterprise Admins (SALES\Enterprise Admins) Administrators (SALES\Administrators)		^
ENTERPRISE DOMAIN CONTROLLERS MAM Administrator (mamadmin@democorp.com)		
		× .
A <u>d</u> d	<u>R</u> emove	е
Permissions for MAM Administrator Allow	Deny	
Full control		^
Read 🗹		
Create all child objects		
Delete all child objects		~
For special permissions or advanced settings, click Advanced.	d <u>v</u> anced	I
OK Cancel Apply	He	elp

- 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.

Select Users, Computers, Service Accounts, or Groups	×	
Select this object type:		
Users, Service Accounts, or Groups		Object Types
From this location:		
democorp.com/Users		Locations
Enter the object names to select (<u>examples</u>):		
MAM Administrator (mamadmin@democorp.com)		Check Names
Advanced	ОК	Cancel

- 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.
- **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.
- **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**.

3	User Mailbox - Google Chrome	_ 🗆 X
amxexch/ecp/Us	ersGroups/NewMailboxOnPremises.aspx?p	owmcid=11&
new user mailbo	хс	
Alias:		A
• Existing user		
MAM Administrator	X Browse	
New user		
First name:		
1.55.1		
Initials:		
Last name:		
*Display name:		
*Name:		
Organizational unit:		
organizational unit.	Browse	+
	Save	Cancel

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

recipients	mailboxes grou	ips resource	es contacts shared migratio
permissions			
compliance management	+- 🖋 🖻 🕫 🕃	•••	
organization	DISPLAY NAME	MAILBOX TYPE	EMAIL ADDRESS
organization	Aman Ali	User	amanali@democorp.com
protection	David Webb	User	davidwebb@democorp.com
	Devika Sharma	User	devikasharma@democorp.com
mail flow	Domain Administrator	User	domadmin@democorp.com
mobile	Ishna Mohan	User	ishnamohan@democorp.com
mobile	Juan Christie	User	juanchristie@democorp.com
public folders	Karl Jordan	User	karljordan@democorp.com
	Niki Portman	User	nikiportman@democorp.com
unified messaging	Nina Tanaka	User	ninatanaka@democorp.com
	Pablo Neruda	User	pabloneruda@democorp.com
servers	Tim Ashford	User	timashford@democorp.com
hybrid	MAM Administrator	User	mamadmin@democorp.com
nyona			

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.

- **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
- <u>Steps to create the public folder Organization Forms Library</u>
- 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

- **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.
- Navigate to Public folders > Public folder mailboxes, and then click the new public folder mailbox icon +

Public Fold	der Mailbox	- Internet Explo	orer	_ 🗆 X
new public folder mailbox				
new public loider malibox				
The first public folder mailbox created will cor folder hierarchy. *Name:	tain the writat	ble copy of the pub	lic	
PFMBX-DEMOCORP				
Organizational unit:				
democorp.com	×	Browse		
Mailbox database:				
Mailbox Database 0748581819	×	Browse		
			_	
			Save	Cancel
			Save	Cancel

- 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 ca 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
 - **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 <u>System Requirements</u> and <u>About User Accounts</u> chapters for preparing database servers.

For the HSM and Search server (AMXHSM)

- Steps to download the install media
- <u>Steps to install the prerequisites</u>

For the Archive server (AMXSERVER-A)

- Steps to download the install media
- Steps to install the prerequisites
- <u>Steps to assign DCOM access and launch permissions</u>
- <u>Steps to install Microsoft Outlook</u>

For Retrieve server (AMXSERVER-R)

- Steps to download the install media
- Steps to install the prerequisites
- <u>Steps to assign DCOM access and launch permissions</u>
- <u>Steps to install Microsoft Outlook</u>
- **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

- **NOTE:** These PowerShell commands are compatible with a Window 2016 operating system. Please refer to the <u>System Requirements</u> 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.

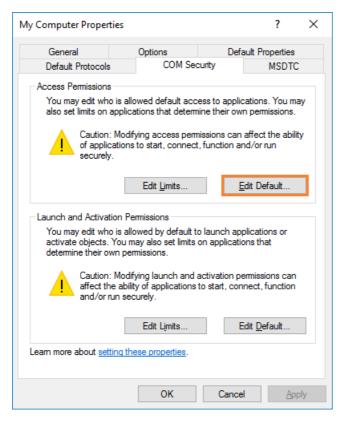
5. In the **Enter the object name to select** field, enter the user logon name of the superuser. For example, enter **democorp\mamadmin**.

Select Users, Computers, Service Accounts, or Group	ps	×
Select this object type:		
Users, Service Accounts, or Groups		Object Types
From this location:		
democorp.com/Users		Locations
Enter the object names to select (<u>examples</u>):		
MAM Administrator (mamadmin@democorp.com)		Check Names
J		
<u>A</u> dvanced	ОК	Cancel

- 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.



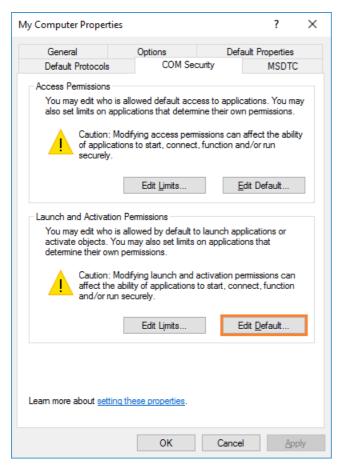
- 4. Open the **COM Security** tab and click **Edit Default**. The Access Permissions window open.
- 5. Click Add. The Select users or Groups window opens.
- 6. Click Locations and select the Archive Manager server (for example, AMXSERVER-A)
- 7. Search and add the following:
 - a. Distributed COM Users
 - 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.

Access Permission		?	×	Access Permission		?	×
Default Security				Default Security			
Group or user names:			_	Group or user names:			_
SELF SYSTEM				SELF SYSTEM			
NETWORK SERVICE Administrators (AMXSERVER	-X\Administrators)			RETWORK SERVICE	Administrators)		
E Distributed COM Users (AMX	· ·	ted COM	U	Distributed COM Users (AMXSE)			U
	A <u>d</u> d	<u>R</u> emove	•		A <u>d</u> d	<u>R</u> emove	•
Permissions for Distributed COM Users	Allow	Deny		Permissions for NETWORK SERVICE	Allow	Deny	_
Local Access Remote Access	\leq			Local Access Remote Access			
	ОК	Can	cel		ОК	Can	cel

- 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.

Launch and Activation Permissio	n	2	×	Launch and Activation Permissi	on	?	X
Launch and Activation Permission					511	•	~
Default Security			_	Default Security			
Group or user names:				Group or user names:			
SYSTEM Administrators (AMXSERVER Distributed COM Users (AMX INTERACTIVE NETWORK SERVICE		ited COM U		SYSTEM Administrators (AMXSERVE Set Distributed COM Users (AM Set INTERACTIVE NETWORK SERVICE			U
Permissions for Distributed COM Users	A <u>d</u> d Allow	<u>R</u> emove Deny		Permissions for NETWORK SERVICE	A <u>d</u> d Allow	<u>R</u> emove Deny	
Local Launch Remote Launch Local Activation Remote Activation				Local Launch Remote Launch Local Activation Remote Activation			
	OK	Cancel			OK	Can	cel

- 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 <u>System Requirements</u> 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 <u>https://www.quest.com/products/metalogix-archive-</u> <u>manager-for-exchange</u> page

or

navigate to the <u>http://www.quest.com/trials</u> 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
- <u>Steps to configure the HSM database connection</u>
- Steps to install the HSM database
- <u>Steps to configure the HSM stores and schemas</u>

Worksheet for this installation

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

ltem	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</i> <i>Guide</i> .
Store name	Name of the media store on a hard drive. With the Advanced Installation 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: Integrated Windows Authentication or SQL Authentication	Integrated Windows Authentication
UserLogin	Username if <i>SQL Authentication</i> is selected	dbadmin
Password	Database password if <i>SQL</i> <i>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 <u>Steps to download the install</u> <u>media</u>.
- 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.

HSM	×
	Welcome to the InstallShield Wizard for HSM
	The InstallShield Wizard will install HSM on your computer. To continue, click Next.
	< <u>B</u> ack <u>N</u> ext > Cancel

8. Click Next. The Logon Information window opens.

HSM	×
Logon Information Specify a user account and password.	
Specify the user account to be used by this application. User accounts m DOMAIN\Username.	nust be in the format
User name:	
democorp \mamadmin	
Password:	
Co <u>n</u> firm password:	
•••••	
InstallShield	
< <u>B</u> ack <u>N</u> ext :	> Cancel

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.

HSM		×
Firewall Settings		
Allow programs to communicate through	Windows Firewall	
InstallShield		
	< <u>B</u> ack <u>N</u> ext > 0	Cancel

Select Allow programs to communicate through Windows Firewall.

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

HSM		×
Ready to Install the Program The wizard is ready to begin installation.		
Click Install to begin the installation.		
If you want to review or change any of your in exit the wizard.	stallation settings, click Ba	ck. Click Cancel to
InstallShield		
	< <u>B</u> ack <u>I</u> nstall	Cancel

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.

HSM	
	InstallShield Wizard Complete
	The InstallShield Wizard has successfully installed HSM. Click Finish to exit the wizard.
	< <u>B</u> ack Finish Cancel

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.

Database configuration	×
Database Connection Wizard	.
The Database Connection Wizard will help you to set up your server. It allows you to specify the database provider and describe the database connection parameters.	
Please select the database provider you want to use:	
Microsoft SQL Server	
C Oracle	
The following page will let you specify the database connection parameters.	
< Back Next > Car	ncel

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

Database configuration		×
Database Connection Wiza	rd	?
Set up your Microsoft SQL Se	erver connection.	
Please enter parameters which will be	used to create a connection to your Microsoft SQL Server.	
Server name:	AMXDB	
Initial catalog:	MAMHSM	
Schema name:	dbo	
Authentication:	Windows Authentication 👻	
User name:		
Password:		
	< Back Next >	Cancel

For Microsoft SQL Server

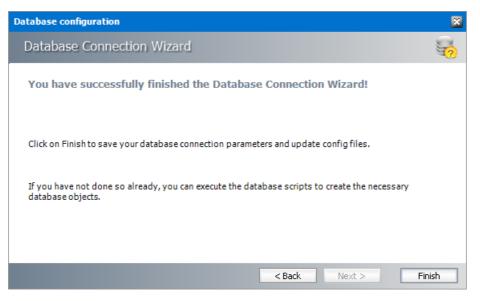
- a. Server name name of the SQL server (eg. AMXDB)
- b. Initial catalog name of the HSM database (e.g. MAMHSM which is the default name of the HSM database)
- c. Schema name name of the SQL Schema (e.g. dbo)
- d. Authentication authentication type used for the database. Choose either Windows authentication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

Database o	configuration 🔀
$\mathbf{?}$	Database does not exists on the server. Shall we try to create it?
	Yes No

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



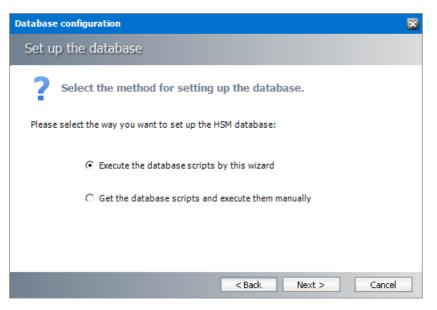
7. Click Finish to close the Database Connection wizard.

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.

Database configuration	×			
Set up the database				
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.				
 Use the default credentials 				
O Use different credentials				
Authentication: Windows Authentication				
Database user:				
Password:				
< Back Next > Cancel				

- 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

Database configuration	×
Set up the database	
Select the database objects you want to create.	
Please select database scripts you want to execute.	
Create tables	
😋 Create procedures	
< Back Next > Cancel	

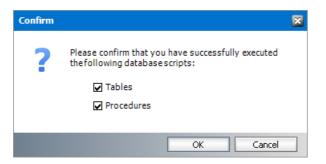
Select both check boxes: Create tables and Create procedures.

For Get the database scripts and run them manually

Database configuration				
Set up the database				
Get the database scripts you w	vant to execute manually.			
Get the selected scripts and execute them manu	ally in an external application.			
Tables	Procedures			
Save the script	Save the script			
Copy to clipboard	Copy to clipboard			
< Back Next > Cancel				

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.

Database configuration	3
Set up the database	
Database setup wizard has finished.	
The database scripts were executed successfully.	
< Back Finish Cancel	

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).

🞇 Configuration					
Configure HSM	Datab	ase Stores	Advanced	Diagnostics	Encryption Packer Tasks
🕡 нรм 🕨	Database conne Provider: Server name: Initial catalog: Table owner: User name:	Microsoft SQ AMXDB MAMHSM dbo (Windows Au)	
	Scripts	8,3.0,39			Configure
a	Scripts version:	8.3.0.39 s up to date.			
52					Execute scripts

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.

Media Store Administration Wizard	d	×
Create a new Media Stor	e	
Choose a na	ime and type for the Media Store.	
Media Store type:	Jukebox, Harddisk, Network Share	•
Name of the new Media Store:	FILESTORE	
	< Back Next >	Cancel

3. Click Next. The location information window opens.

Media Store Administration W	/izard	×
Jukebox, Harddisk, N	etwork Share	
	a location where the archived files should be saved. Ipported storage provider for this Media Store.	
Storage provider :	Hard disk, UNC Path 🔹	
Path for the Media Store:	C:\HSM	Browse
Allow multiple saving:		
Path for multiple saving:		Browse
Path for fast file access:	Ţ	
Retention time support:	<none> •</none>	
	< Back Next >	Cancel

Enter the information as described below;

a. **Storage Provider** - select Hardisk, 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*.

Media Store Administration Wizard		×		
Jukebox, Harddisk, Network Sha	are			
Please choose the PamServers where the Media Store should connect to: Please choose how long the Media Stores pauses before it tries to connect to the PamServers. This gives the PamServer the possibility to start completly before the Media Store tries to connect to this PamServer the first time. HSM Servers where the Media Store should connect to: AMXHSM(HSM)				
	Add Server	×		
🛨 Add	Specify the server where this store should cor	inect.		
Connection interval between the Media	Server type: HSM Server	•		
	Server name: AMXHSM			
	ОК	Cancel		

- 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.

Media Store Admi	nistration Wizard	×
Jukebox, Ha	rddisk, Network Share	
	The wizard has finished collecting the information needed to create the Media Store.	
	Relative speed of the store: 100	
	Use HSM Cache for read operations:	
	Write protection (mark as read-only):	
	Re-create service for this Media Store:	
	< Back Finish Cancel	

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

Restart service		
Service restart needed	ę	÷
To apply the changes you have made, t restarted:	he following services should be	
Name	Status	
MAM HSM Base Operations MAM HSM Asynchronous Operations	Running Stopped	
Do you want to restart the selected ser	rvices?	
	Yes No]

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	8
Create new	v schema 🛛 😥
Store:	FILESTORE@AMXHSM •
Schema name:	FILESCHEMA
Enforce store:	
Encryption:	<none> •</none>
Task:	<none></none>
Compression:	
Exclude files:	.gz;.zip;.rar;.jpg
	Use ";" as separator and include the "." in extensions. Example: .zip;.jpg;.rar
Packer:	<none> •</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	5
🕡 нѕм 🕨	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	
Ŋ	1 FILESCHEMA FILESTORE AMXHSM Create, ☑ Edit ☑ Delete ☑ Test ౭ Refresh	

- 13. Close the *Configuration* wizard.
- NOTE: The steps to create a local media store described above with default values completes i 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.

HSM Test		×
HSM Server: File identifier:	AMFHSM.democorp.com	
Identifier type:	● HsmId	
	📮 Archive 👕 Retrieve 👻 Delete 🗵 Set retention 😫 Mass actions 🗸	
	Close	

3. Click Archive. The Archive window opens.

Archive			×
Target schema:	FILESCHEMA (FILESTORE)		•
Retention time:	Fixed value 0	months	
	C Infinite		
	C Indefinite		
• Use generated test files			
Unique content:	20200927230000267283766	lbdad49508b431b80d988b473f0254d	8
Original filename:	TestFile.txt		
O Use a specific test file			
Path to test file:			
Options:	Make each file unique	Forcecompression	
	🔲 Use invalid checksum	Force no compression	
	Archive empty file	Enable logging	
		Archive	ose

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.

Result	t		×
~	Step 1:	Success	
	HsmId:	1	
	Guid:	n/a	
~	Step 2:	Success	
	HsmId:	2	
	Guid:	n/a	
Elap	sed time:	00:00:00.2023647	
File	size:	32.0 KB (32768 bytes)	
			ОК

- 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.

ISM Test		×
HSM Server:	AMFHSM.democorp.com	
File identifier:	00000001	
Identifier type:	● HsmId ○ Guid	
	📒 Archive 📑 Retrieve 👻 Delete 🔟 Set retention 🔅 Mass actions	•
	Close	

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.

\checkmark	Result:	Success
	Id:	1
	Name:	TestFile.txt
	Size:	32.0 KB (32768 bytes)
	Elapsed time:	00:00:00.0476363

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 <u>Deployment Plan</u> 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

- <u>Worksheet for this installation</u>
- 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

- <u>Steps to configure the Post Processing database connection</u>
- <u>Steps to install the Post Processing database</u>

Worksheet for this installation

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

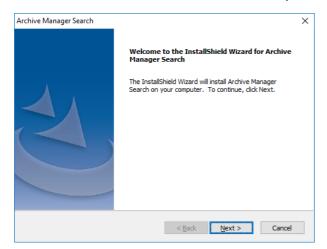
ltem	Description	Example
HSM server	The server where the HSM and Archive Manager Search will be installed.	AMXHSM
Superuser account	Windows account that is used to install the application and run the Archive Manager for Exchange services.	username: democorp\mamadmin password: ************
Media folder	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</i> <i>Guide</i> .
Store name	Name of the media store on a hard drive. With the <i>Advanced</i> <i>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: Integrated Windows Authentication or SQL Authentication	Integrated Windows Authentication
UserLogin	Username if <i>SQL Authentication</i> is selected	dbadmin
Password	Database password if <i>SQL</i> <i>Authentication</i> is selected	****
Database server	The database server instance name where the databases for Archive Manager for Files will be installed.	AMXDB

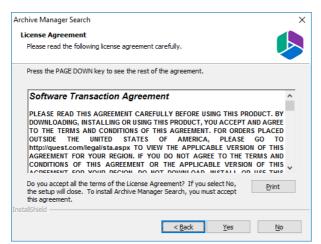
Steps to install Archive Manager Search

- 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 <u>Steps to download the install</u> <u>media</u>.
- 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.

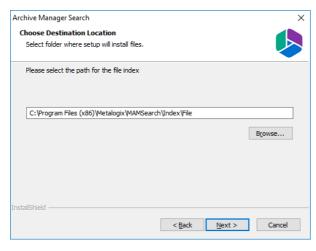


9. Click **Yes** to accept the license. The *Setup Type* window opens. Click **Print** if you wish to print the license agreement.

Archive Manager	Search X
Setup Type Select the set	up type to install.
Please select	a setup type.
● <u>C</u> omplete	All program features will be installed. (Requires the most disk space.)
O Cu <u>s</u> tom	Select which program features you want installed, Recommended for advanced users,
InstallShield	< Back Next > Cancel

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.

Archive Manager Search			×
Choose Destination Location Select folder where setup will install files.			
Please select the path for the mail index			
C:\Program Files (x86)\Wetalogix\WAMSearc	n\Index\Mail	[B <u>r</u> owse
InstallShield	< <u>B</u> ack	<u>N</u> ext >	Cancel

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

Archive Manager Search	×
Logon Information Specify a user account and password.	
Specify the user account to be used by this application. User accound DOMAIN/Username.	unts must be in the format
User name:	
democorp \mamadmin	
Password:	
Confirm password:	
•••••	
InstallShield	
< Back	Next > Cancel

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.

Archive Manager Search		×
Firewall Settings		
Allow programs to communicate through W	indows Firewall	
InstallShield	< <u>B</u> ack <u>N</u> ext >	Cancel

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

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

Archive Manager Search		×
Ready to Install the Program		
The wizard is ready to begin installation.		
Click Install to begin the installation.		
If you want to review or change any of you exit the wizard.	r installation settings, clio	k Back. Click Cancel to
installShield		
	< Back Ir	Cancel

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

Archive Manager Search	
	InstallShield Wizard Complete
	The InstallShield Wizard has successfully installed Archive Manager Search. Click Finish to exit the wizard.
Z	
	< Back Finish Cancel

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.

Database configuration	×
Database Connection Wizard	2
The Database Connection Wizard will help you to set up your server. It allows you to specify the database provider and describe the database connection parameters.	
Please select the database provider you want to use:	
Microsoft SQL Server	
C Oracle	
The following page will let you specify the database connection parameters.	
< Back Next > Ca	ncel

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

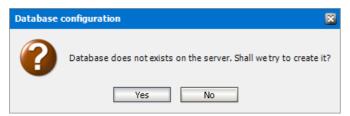
Database configuration		×
Database Connection Wiza	rd	2
Set up your Microsoft SQL Se	erver connection.	
Please enter parameters which will be	used to create a connection to your Microsoft SQL Server.	
Server name:	AMXDB	
Initial catalog:	MAMSEARCH	
Schema name:	dbo	
Authentication:	Windows Authentication 🔹	
User name:		
Password:		
	< Back Next >	Tancel

For Microsoft SQL Server

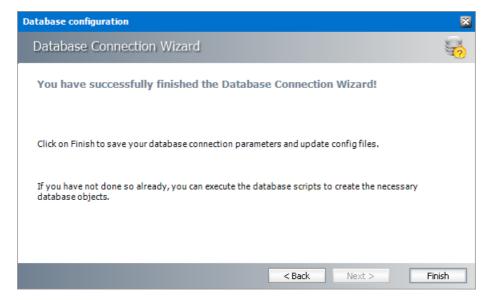
- a. Server name name of the SQL server (eg. AMXDB)
- b. Initial catalog name of the HSM database (e.g. MAMSEARCH which is the default name of the Archive Manager Search database)
- c. Schema name name of the SQL Schema (e.g. dbo)
- d. Authentication authentication type used for the database. Choose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

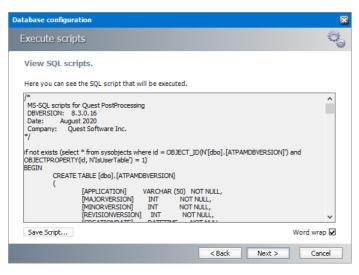
Database configuration	×
Execute scripts	¢¢
Select scripts to execute.	
Please select SQL scripts you want to execute.	
Ol_searchTables.sql Unselect All Unselect All	
02_searchProcedures.sql	
🗹 🥘 03_searchStandardValues.sql	
The following page will let you specify the user under which to execute database scripts.	
< Back Next > Ca	ncel

- 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 w	hich to execute database scripts.	
Please specify user under which t modify tables and procedures in	to execute database scripts. The user must be allowed to create or the database.	
Authentication:	Windows 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



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.

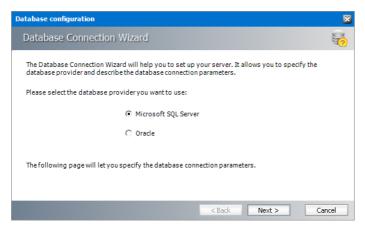
Database configuration	×
Execute scripts	0.
Execute SQL scripts.	
Here you can execute the selected SQL scripts to set up the database.	
01_searchTables.sql	
02_searchProcedures.sql	
03_searchStandardValues.sql	
Click on Next to execute scripts.	00:00
< Back Next >	Cancel

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.

🞇 Configuration					
Configure Sear	ch		Database	Search Scopes	Connectivity
🛐 ным	Database conne Provider:				
🧕 Search 🕨 🕨	Server name:	Microsoft SQL Server AMXDB			
ਗ਼ Post Processing	Initial catalog: Table owner:	MAMSEARCH dbo			
	User name:	(Windows Authentication)		Co	nfigure
	Database version: Scripts version:	8.3.0.17 8.3.0.17			
SS	🥺 Your database	is up to date.		Execu	te scripts

Steps to configure the Post Processing database connection

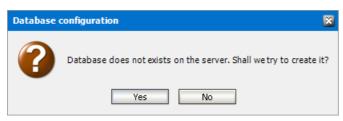
- 1. When the installation completes, the *Configuration* wizard opens. If it does not open automatically, click **Start > Metalogix > Archive Manager Configuration**.
- 2. From the feature panel on the left, click **Post Processing** and select the **Database** tab.
- 3. Click **Configure**. The *Database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



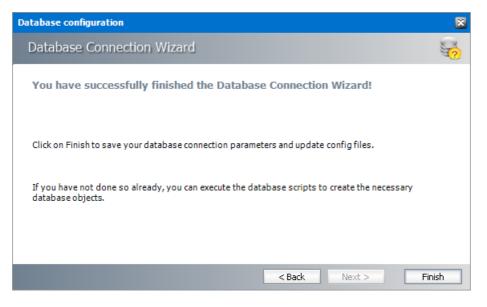
4. Click Next. The SQL Server connection window opens.

Database configuration		×
Database Connection Wiza	rd	?
Set up your Microsoft SQL Se	erver connection.	
Please enter parameters which will be	used to create a connection to your Microsoft SQL Serv	er.
Server name:	AMXDB	
Initial catalog:	MAMINDEX	
Schema name:	dbo	
Authentication:	Windows Authentication 🔹	
User name:		
Password:		
	< Back Next >	Cancel

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.

Database configuration	×
Execute scripts	C
Select scripts to execute.	
Please select SQL scripts you want to execute.	
Image: Selection of the se	
The following page will let you specify the user under which to execute database scripts	5.
< Back Next >	Cancel

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.

Database configuration		×
Execute scripts		¢Ç
Specify the user under w	hich to execute database scripts.	
Please specify user under which modify tables and procedures in	to execute database scripts. The user must be allowed to create or the database.	
Authentication:	Windows Authentication 🔹	
Database user:		
Password:		
☑ I want to see the SQL script be	fore execution (for advanced users)	
	< Back Next > Cance	el

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

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(d, N'ISUBERTable') = 1) BEGIN CREATE TABLE [dbo].[ATPAMDBVERSION] ([APPLICATION] VARCHAR (S0) NOT NULL, [MAJORVERSION] INT NOT NULL, [REVISIONVERSION] INT NOT NULL]	<>
Save Script Word wra	p 🗹
< Back Next > Can	cel

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.

Database configuration	×
Execute scripts	1
Execute SQL scripts.	
Here you can execute the selected SQL scripts to set up the database.	
01_indexTables.sql	
02_indexProcedures.sql	
O3_indexStandardValues.sql	
Click on Next to execute scripts. 00:00	
< Back Next > Cancel	

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).

🎇 Configuration			
Configure Post	Processing	Database General Settings E	xchange Files OCR Engine
可 нам	😼 Database conn		
页 Search	Provider: Server name:	Microsoft SQL Server AMXDB	
Post Processing 🕨	Initial catalog: Table owner:	MAMINDEX dbo	
	User name:	(Windows Authentication)	Configure
	Database version: Scripts version:	8.2.0.12 8.2.0.12	
59	🤣 Your database	is up to date.	Execute scripts

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 <u>Install the Archive server</u> 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.

Configuration		×
Add ar	chive server connection	
Server name:	AMXSERVER-A	
Type:	Exchange Archive Server 🔹	
	< Back Next > Cancel	

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

Database configuration	×
Database Connection Wizard	?
The Database Connection Wizard will help you to set up your server. It allows you to specify the database provider and describe the database connection parameters.	
Please select the database provider you want to use:	
Microsoft SQL Server	
C Oracle	
The following page will let you specify the database connection parameters.	
< Back Next > Car	ncel

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 Wizar	d See
Set up your Microsoft SQL Ser	ver connection.
Please enter parameters which will be u	used to create a connection to your Microsoft SQL Server.
Server name:	AMXDB
Initial catalog:	MAMEXCH
Schema name:	dbo
Authentication:	Windows Authentication 🔹
User name:	
Password:	
	< Back Next > Cancel

For Microsoft SQL Server

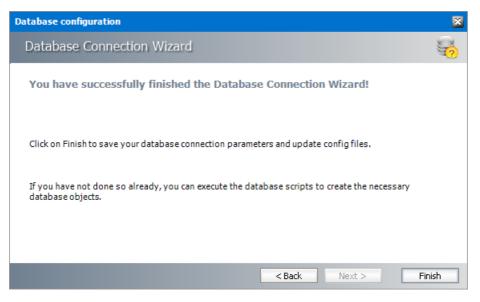
- a. Server name name of the SQL server (eg. AMXDB)
- b. **Initial catalog** name of the Archive Manager for Files database (e.g. **MAMEXCH** which is the default name of the Archive Manager for Files database)
- c. Schema name name of the SQL Schema (e.g. dbo)
- d. Authentication authentication type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

Database o	configuration 🔀
$\mathbf{?}$	Database does not exists on the server. Shall we try to create it?
	Yes No

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.

Configuration				×
	e Archive da	atabase conr	nection	
Provider:	Microsoft SC	QL Server		
Server name:	AMXDB.dem	ocorp.com		
Initial catalog:	MAMEXCH			
Table owner:	dbo			
User name:	(Windows A	uthentication))	
Import Con	figure	< Back	Next >	Cancel

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

Configuration				×
j Index	directory.			
Index directory:	C:\SEARCH			Browse
		< Back	Next >	Cancel

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.

×
ncel

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

🞇 Configuration		J
Configure Sear	ch Database Search Scopes Connectivity	
бр ным бор Search ♪	Manage search scopes	
2 Post Processing		
Ŋ	Configuration summary Server type: Exchange Archive Server name: AMXSERVER-A Database: AMXDB.democorp.com\MAMEXCH Indexing database: AMXDB\MAMINDEX Index directory: C:\SEARCH Add Remove Configure	

11. Close the *Configuration* wizard.

Install the Archive server

In this topic:

- <u>Worksheet for this installation</u>
- <u>Steps to install Archive Manager for Exchange</u>
- <u>Steps to configure the Archive Manager database</u>
- <u>Steps to install the Archive Manager database</u>
- <u>Steps to configure the Auditing database</u>
- <u>Steps to install the Auditing database</u>
- <u>Steps to configure the User database</u>
- Steps to install the User database
- <u>Steps to start the Archive Manager services</u>
- <u>Steps to configure and verify the Archive server</u>

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: Integrated Windows Authentication or SQL Authentication	Integrated Windows Authentication
UserLogin	Username if <i>SQL Authentication</i> is selected	dbadmin
Password	Database password if <i>SQL</i> <i>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.

Archive Manager for Exchange		×
	Welcome to the InstallShield Wizard for Archive Manager for Exchange The InstallShield Wizard will install Archive Manager for Exchange on your computer. To continue, dick Next.	
	< Back Next > Cancel	

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

Archive Manager for Exchange	×
License Agreement	
Please read the following license agreement carefully.	
Press the PAGE DOWN key to see the rest of the agreement.	
Software Transaction Agreement	^
PLEASE READ THIS AGREEMENT CAREFULLY BEFORE USING THIS PRODUCT. BY DOWNLOADING, INSTALLING OR USING THIS PRODUCT, YOU ACCEPT AND AGREE TO THE TERMS AND CONDITIONS OF THIS AGREEMENT. FOR ORDERS PLACED OUTSIDE THE UNITED STATES OF AMERICA, PLEASE GO TO http://quest.com/legal/sta.aspx TO VIEW THE APPLICABLE VERSION OF THIS AGREEMENT FOR YOUR REGION. IF YOU DO NOT AGREE TO THE TERMS AND CONDITIONS OF THIS AGREEMENT OR THE APPLICABLE VERSION OF THIS ACREEMENT FOR YOUR DECIDE DO NOT DOWNLOAD. INSTALL OR USE THE	v
Do you accept all the terms of the License Agreement? If you select No, the setup will dose. To install Archive Manager for Exchange, you must accept this agreement. InstallShield	
< <u>B</u> ack <u>Y</u> es <u>N</u> o	

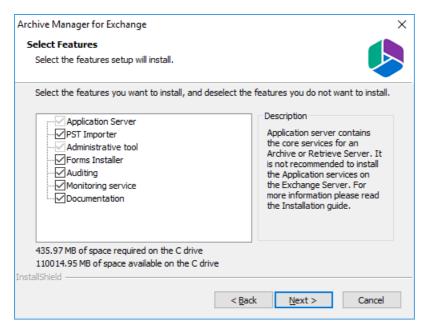
8. Click **Yes** to accept the license. The *License Key* window opens. Click **Print** if you wish to print the license agreement.

Activate	: License Key	×
Q	Enter license key and select the activation method	
	License key:	
	Activation mode:	
	Online activation (requires online internet connection)	
	○ Offline activation	
	<u>Set proxy</u>	
	< Back Next > Close	

 If you are connected to the internet, select Online activation or see <u>License Activation</u> 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.

Archive Ma	nager for Exchange	×
	Destination Location Dider where setup will install files.	
	Install Archive Manager for Exchange to: C:\Program Files (x86)\Metalogix	Change
InstallShield -	< <u>B</u> ack <u>N</u> ext >	Cancel

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.

Archive Manager for Exchange			×
Archive Manager site port Information Please define the Archive Manager site port.			
Archive Manager site port number: 80			
Note: port number should be between 1 <-> 6 InstallShield —	55535 < <u>B</u> ack	Next >	Cancel

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.

Archive Manager for Exchange	×
Select HSM server Select the HSM server	
Type the name of the HSM server, or select it from the list of servers	
HSM server	
AMXHSM	Browse
Test HSM server Information: The setup successfully established a connection with the HSM server.	Test server
InstallShield	> Cancel

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.

Archive Manager for Exchange	×
Search server Select the search server	
Type the name of the search server, or select it from the list of servers	
Enable Archive Manager Search	
Search server	
AMXHSM	Browse
Test Archive Manager Search server	Test server
<back next=""></back>	Cancel

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.

rchive Manager for Exchange	×
Logon Information	
Specify a user account and passwo	rd.
Specify the user account to be use DOMAIN\Username.	d by this application. User accounts must be in the format
<u>U</u> ser name:	
democorp \mamadmin	
Password:	
•••••	
Confirm password:	
Confirm password:	
Confirm password:	
Confirm password:	

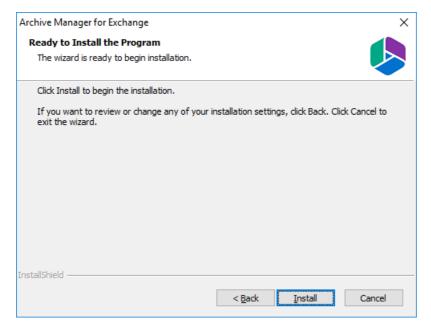
In the **User name** field, specify the superuser name (eg. **democorp\mamadmin**) and **Password**. Enter the password again in the **Confirm password** field.

15. Click Next. The Firewall Settings window opens.

Archive Manager for Exchange	×
Firewall Settings	
Allow programs to communicate through Windows Firewall	
InstallShield	
< <u>B</u> ack <u>Next</u> >	Cancel

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.

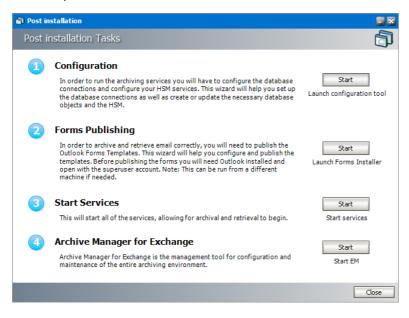
16. Click Next. The Ready to Install the Program window opens.



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

Archive Manager for Exchange				
	InstallShield Wizard Complete			
Å	The InstallShield Wizard has successfully installed Archive Manager for Exchange. Click Finish to exit the wizard.			
	Launch Post Installation Tasks			
	< <u>B</u> ack Finish Cancel			

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.

Database configuration	×
Database Connection Wizard	S
The Database Connection Wizard will help you to set up your server. It allows you to specify the database provider and describe the database connection parameters.	
Please select the database provider you want to use:	
Microsoft SQL Server	
C Oracle	
The following page will let you specify the database connection parameters.	
< Back Next > Car	ncel

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

Database configuration		×
Database Connection Wiza	rd	?
Set up your Microsoft SQL Se	rver connection.	
Please enter parameters which will be	used to create a connection to your Microsoft SQL Server.	
Server name:	AMXDB	
Initial catalog:	MAMEXCH	
Schema name:	dbo	
Authentication:	Windows Authentication 🔹	
User name:		
Password:		
	< Back Next > Cancel	

For Microsoft SQL Server

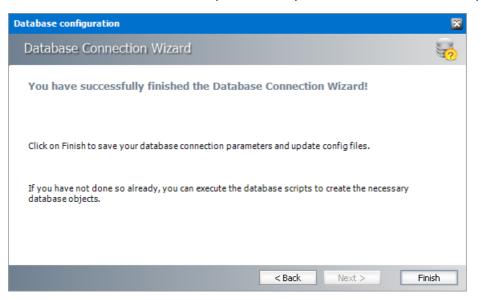
- a. Server name name of the SQL server (eg. AMXDB)
- b. **Initial catalog** name of the HSM database (e.g. **MAMEXCH** which is the default name of the Archive Manager for Exchange database)
- c. Schema name name of the SQL Schema (e.g. dbo)
- d. Authentication authentication type used for the database.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

Database o	configuration
\bigcirc	Database does not exists on the server. Shall we try to create it?
	Yes No

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.

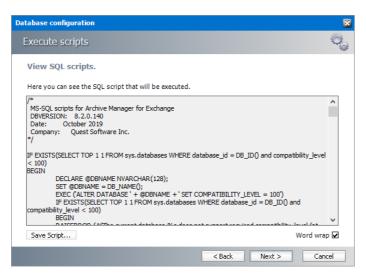
Database configuration	×
Execute scripts	0
Select scripts to execute.	
Please select SQL scripts you want to execute.	
Select All	
Unselect All	
🔽 😡 03_exchangeProcedures.sql	
V 🔍 04_exchangeStandardValues.sql	
🔽 國 05_exchangeUpdates.sql	
08_ExchangePostProcessingProcedures.	
The following page will let you specify the user under which to execute database scripts.	
< Back Next > Can	cel

- 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 modify tables and procedures in	to execute database scripts. The user must be allowed to create or the database.			
Authentication:	Windows Authentication 🔹			
Database user:				
Password:				
☑ I want to see the SQL script before execution (for advanced users)				
	< Back Next > Cance	el		

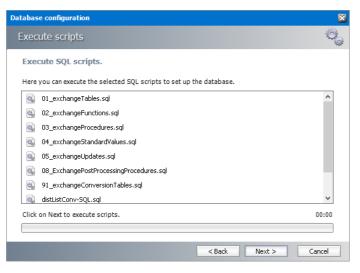
Enter the information as described below:

- 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).

🞇 Configuration			
Configure Exch	ange Archive		Database
Auditing	🙆 Database conne		
•	Provider:	Microsoft SQL Server	
Jusers	Server name:	AMXDB	
Exchange	Initial catalog:	MAMEXCH	
Archive	Table owner:	dbo	
	User name:	(Windows Authentication)	
			Configure
	Co Scripts		
	Database version:	8.3.0.173	
	Scripts version:	8.3.0.173	
	🥝 Your database is	s up to date.	
52			Execute scripts

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.

Database configuration		×
Database Connection Wiza	rd	?
Set up your Microsoft SQL Se	rver connection.	
Please enter parameters which will be	used to create a connection to your Microsoft SQL Server.	
Server name:	AMXDB	
Initial catalog:	MAMAUDIT	
Schema name:	dbo	
Authentication:	Windows Authentication 🔹	
User name:		
Password:		
	< Back Next > C	ancel
		ancer

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)
- a. 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.

🞇 Configuration				
Configure Audit	ing		Database	Connection Logtargets
Auditing	😼 Database conne	cction		
	Provider:	Microsoft SQL Server		
可 Users	Server name:	AMXDB		
Exchange	Initial catalog:	MAMAUDIT		
archive	Table owner:	dbo		
	User name:	(Windows Authentication)		
				Configure
	Scripts			
	Database version:	8.3.0.27		
	Scripts version:	8.3.0.27		
Cl.	🥝 Your database i	s up to date.		
\mathcal{S}				Execute 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 Wiza	rd	2
Set up your Microsoft SQL Se	rver connection.	
Please enter parameters which will be	used to create a connection to your Micro	osoft SQL Server.
Server name:	AMXDB	
Initial catalog:	MAMUSER	
Schema name:	dbo	
Authentication:	Windows Authentication 🔹	
User name:		
Password:		
	< Back Ne	ext > 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.

🞇 Configuration				
Configure Users	5		Database	SMTP Configuration
auditing	😼 Database conne	sclion	_	
	Provider:	Microsoft SQL Server		
可 Users 🕨 🕨	Server name:	AMXDB		
Exchange	Initial catalog:	MAMUSER		
Texchange Archive	Table owner:	dbo		
	User name:	(Windows Authentication)		
				Configure
	Scripts			
	Database version:	8.3.0.32		
	Scripts version:	8.3.0.32		
	🥝 Your database is	s up to date.		
12				Execute 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.
- 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.
 - **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.

- 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.
- 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.

Archive Manager for Exchange			
Session View Tools Help			
🖆 🗗 🛍 🗙 D. 🗞 🏹] 🕬 🍳 🔋		
Groups Settings Public Folders	Jobs Retention Locations		
Set filter Clear filter			
Group name Alias	Property	Value	
🎯 🏮 🦈 Server Role: Archive Server	Loaded	FullAccess	Manager

- 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 <u>Setup</u> 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 that 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:

- <u>Worksheet for this installation</u>
- 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
- <u>Steps to start the Archive Manager services</u>
- 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: Integrated Windows Authentication or SQL Authentication	Integrated Windows Authentication
UserLogin	Username if <i>SQL Authentication</i> is selected	dbadmin
Password	Database password if SQL Authentication 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.

Archive Manager for Exchange		×
	Welcome to the InstallShield Wizard for Archive Manager for Exchange The InstallShield Wizard will install Archive Manager for Exchange on your computer. To continue, click Next.	
	< <u>B</u> ack <u>Next ></u> Cancel	

7. Click Next. The License Agreement window opens.

Archive Manager for Exchange	×
License Agreement Please read the following license agreement carefully.	
Press the PAGE DOWN key to see the rest of the agreement.	
Software Transaction Agreement	^
PLEASE READ THIS AGREEMENT CAREFULLY BEFORE USING THIS PRO DOWNLOADING, INSTALLING OR USING THIS PRODUCT, YOU ACCEPT AI TO THE TERMS AND CONDITIONS OF THIS AGREEMENT. FOR ORDERS OUTSIDE THE UNITED STATES OF AMERICA, PLEASE http://quest.com/legal/sta.aspx TO VIEW THE APPLICABLE VERSION AGREEMENT FOR YOUR REGION. IF YOU DO NOT AGREE TO THE TE CONDITIONS OF THIS AGREEMENT OR THE APPLICABLE VERSION	ND AGREE S PLACED GO TO I OF THIS RMS AND OF THIS
Do you accept all the terms of the License Agreement? If you select No, the setup will dose. To install Archive Manager for Exchange, you must accept this agreement. InstallShield	Print
< <u>Back Y</u> es	No

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

Activate	License Key	×
Q	Enter license key and select the activation method	
	License key:	
	Activation mode:	
	Online activation (requires online internet connection)	
	○ Offline activation	
	<u>Set proxy</u>	
	< Back Next > Close	

 If you are connected to the internet, select Online activation or see <u>License Activation</u> 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.

Archive Ma	nager for Exchange	×
	Destination Location older where setup will install files.	
	Install Archive Manager for Exchange to: C: \Program Files (x86)\Metalogix	<u>C</u> hange
InstallShield ·	< Back	Next > Cancel

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

Archive Manager for Exchange	×
Select Features Select the features setup will install.	
Select the features you want to install, and deselect the	features you do not want to install. Description Application server contains the core services for an Archive or Retrieve Server. It is not recommended to install the Application services on the Exchange Server. For more information please read the Installation guide.
354.22 MB of space required on the C drive 107482.56 MB of space available on the C drive InstallShield	
< <u>B</u> ac	k <u>N</u> ext > Cancel

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.

Archive Manager for Exchange			×
Archive Manager site port Information Please define the Archive Manager site port.			
Archive Manager site port number: 80			
Note: port number should be between 1 <-> 6 InstallShield —	55535 < <u>B</u> ack	Next >	Cancel

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.

Archive Manager for Exchange	×
Select HSM server Select the HSM server	
Type the name of the HSM server, or select it from the list of servers	
HSM server	
AMXHSM	Browse
Test HSM server Information: The setup successfully established a connection with the HSM server.	Test server
InstallShield	> Cancel

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.

Archive Manager for Exchange	×
Search server Select the search server	
Type the name of the search server, or select it from the list of servers	
Enable Archive Manager Search	
Search server	
AMXHSM	Browse
Test Archive Manager Search server	Test server
< Back Next >	Cancel

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.

rchive Manager for Exchange	×
Logon Information	
Specify a user account and passw	ord.
Specify the user account to be use DOMAIN\Username.	ed by this application. User accounts must be in the format
User name:	
democorp \mamadmin	
Password:	
•••••	
Confirm password:	
Confirm password:	
Confirm password:	

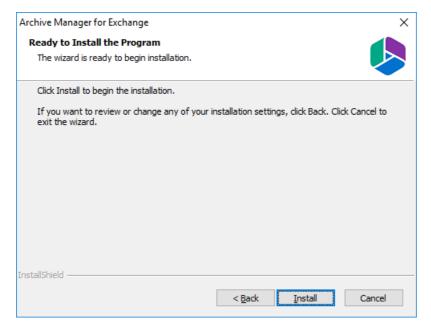
In the **User name** field, specify the superuser name (eg. **democorp\mamadmin**) and **Password**. Enter the password again in the **Confirm password** field.

15. Click Next. The Firewall Settings window opens.

Archive Manager for Exchange	×
Firewall Settings	
Allow programs to communicate through Windows Firewall	
InstallShield	
< <u>B</u> ack <u>Next</u> >	Cancel

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.

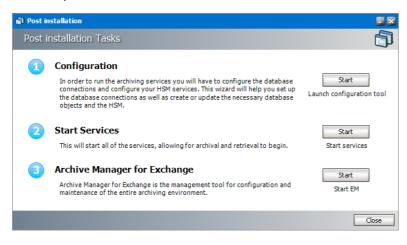
16. Click Next. The Ready to Install the Program window opens.



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

Archive Manager for Exchange	
	InstallShield Wizard Complete
	The InstallShield Wizard has successfully installed Archive Manager for Exchange. Click Finish to exit the wizard.
	Launch Post Installation Tasks
< <u>B</u> ack Finish Cancel	

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.

Database configuration	×
Database Connection Wizard	? ?
The Database Connection Wizard will help you to set up your server. It allows you to specify the database provider and describe the database connection parameters.	
Please select the database provider you want to use:	
Microsoft SQL Server	
C Oracle	
The following page will let you specify the database connection parameters.	
< Back Next > Car	icel

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

Database configuration	×
Database Connection Wizar	d 🦃
Set up your Microsoft SQL Se	rver connection.
Please enter parameters which will be	used to create a connection to your Microsoft SQL Server.
Server name:	AMXDB
Initial catalog:	MAMEXCH
Schema name:	dbo
Authentication:	Windows Authentication 🔹
User name:	
Password:	
	< Back Next > Cancel

For Microsoft SQL Server

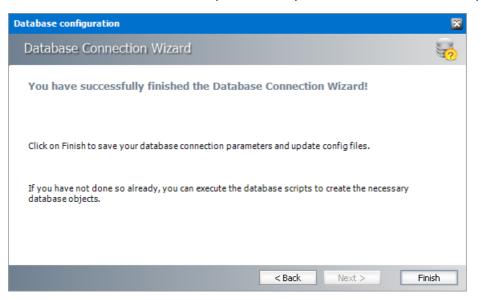
- a. Server name name of the SQL server (eg. AMXDB)
- b. **Initial catalog** name of the HSM database (e.g. **MAMEXCH** which is the default name of the Archive Manager for Exchange database)
- c. Schema name name of the SQL Schema (e.g. dbo)
- d. Authentication authentication type used for the database.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

Database configuration						
\bigcirc	Database does not exists on the server. Shall we try to create it?					
	Yes No					

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.

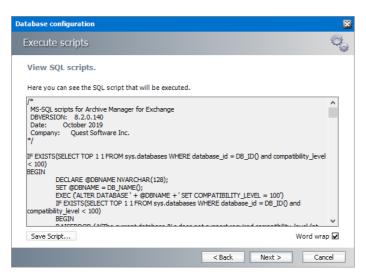
Database configuration		×
Execute scripts		00
Select scripts to execute.		
Please select SQL scripts you want to execute.		
🔽 阈 01_exchangeTables.sql	^	Select All
🔽 截 02_exchangeFunctions.sql		Unselect All
🗹 🤹 03_exchangeProcedures.sql		
🗹 截 04_exchangeStandardValues.sql		
🗹 截 05_exchangeUpdates.sql		
08_ExchangePostProcessingProcedure	s. 🗸	
٢	•	
The following page will let you specify the user under which to execute o	lataba	ase scripts.
< Back		Next > Cancel

- 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 w	Specify the user under which to execute database scripts.						
Please specify user under which modify tables and procedures in	to execute database scripts. The user must be allowed to create or the database.						
Authentication:	Windows Authentication 🔹						
Database user:							
Password:							
\checkmark I want to see the SQL script before execution (for advanced users)							
	< Back Next > Cance	el					

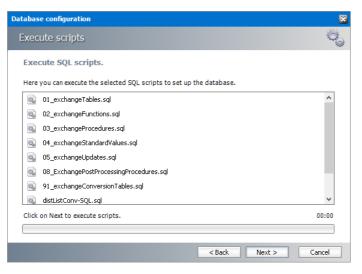
Enter the information as described below:

- 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).

🞇 Configuration			
Configure Exch	ange Archive		Database
🛐 Users	Database conn Provider:	ection Microsoft SQL Server	
Exchange Archive	Server name:	AMXDB	
	Initial catalog: Table owner: User name:	AMXEXCHANGE dbo (Windows Authentication)	
	Scripts	(windows Authentication)	Configure
	Database version: Scripts version:	8.2.0.140 8.2.0.140	
\mathcal{A}	🥝 Your database	is up to date.	Execute scripts
			Execute scripts

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.

Database configuration		×
Database Connection Wiza	rd	
Set up your Microsoft SQL Se	rver connection.	
Please enter parameters which will be	used to create a connection to your Micro	osoft SQL Server.
Server name:	AMXDB	
Initial catalog:	MAMUSER	
Schema name:	dbo	
Authentication:	Windows Authentication 🔹	
User name:		
Password:		
	< Back Ne	ext > 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.

🛠 Configuration				
Configure Users	5		Database	SMTP Configuration
Users V Sechange Archive	Provider: Server name: Initial catalog: Table owner: User name:	Ection Microsoft SQL Server AMXDB MAMUSER dbo (Windows Authentication)		
Ŋ	Corpts Database version: Scripts version: Otherwork Your database	8.2.0.30 8.2.0.30 is up to date.	[Configure

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.
- 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.
 - **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.

S Options	×
6	
Options	Server Role Public Folders Auditing
Server settings	Server role Select the server role:
Archiving settings	Selecting the server role defines which tasks can be performed on the given server. For example a retrieve server will never run scheduled tasks or
🥂 Message classes	address book synchronization. It is important to note that two archive servers are not allowed in the same location.
📋 User Roles	
	OK Cancel Apply

- 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.

Archive Manager for Exchange			
Session View Tools Help			
🖆 🖻 🛍 🗙 D 👒 🗞 🗒 🗇	💐 🔋		
Groups Settings Public Folders Jobs	Retention Locations		
Set filter Clear filter			
Group name Alias	Property	Value	
🎯 🏮 🦈 Server Role: Retrieve Server	Loaded	FullAccess Manager	

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

Application Configuration

In this chapter

- Setup the Address Book
- Publish Archive Manager Forms

Setup up the Address Book

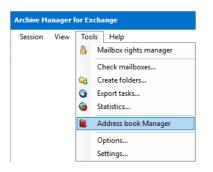
You must import the Microsoft Exchange servers, mailboxes and groups and keep them in synch to facilitate email archiving. With the Address Book Manager, you can import the servers, mailboxes and groups and schedule automatic synchronization jobs to keep the Metalogix Archive Manager for Exchange database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

In this chapter:

- Steps to open the Address Book Manager
- <u>About the Address Book Manager</u>
- 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

Archive Manager for Exchange						
Se	ssio	n	View	Tools	Help	
P	\$	Þ	Ē	$X \mid \square$	66	📄 🥬 🍳 🔋

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

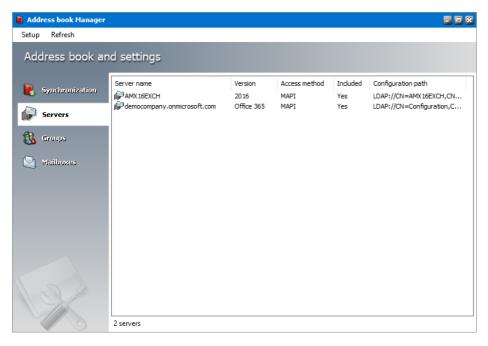
The Address Book Manager window provides two menu options:

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.



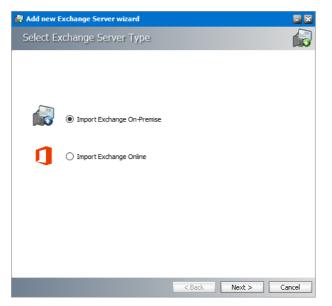
- Option 2 By starting a task from the Servers tab of the Address Book Manager.
 - 1. Open the Address Book Manager.
 - 2. Click the Servers tab.
 - 3. Right-click inside the list view and from the context menu point to **Tasks** and select **Add Server...** to initiate the import process.

Address book Manager					
Setup Refresh Address book ar	nd settings				
통 Synchronization	Server name	Version	Access In	cluded Configuration path	
Servers					
🚷 Groups		Tasks Add/Remove co	•	Add Server Update Servers	
Nailboxes		Refresh	umns	Purge Servers	
		Properties			
13P					
	1 servers				

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.

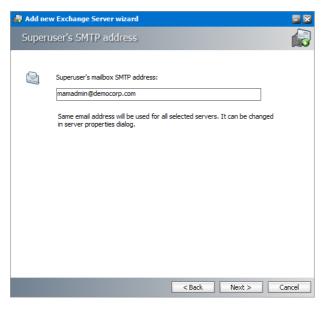


2. Click **Next**. A list of Microsoft Exchange Servers appear that are accessible within your trusted domain.

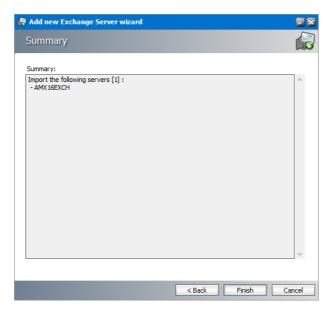
📸 Add new Exchange Server wizard		- ×
Available Exchange Servers		
Servers: 1 new servers / 0 imported servers		
Server Name	Exchange Version	
MXEXCH	Exchange 2016	
Set Exchange Server permissions for Meta	alogix service account	
Set Public Folders permissions for Metalog	-	
	< Back Next > C	ancel

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.



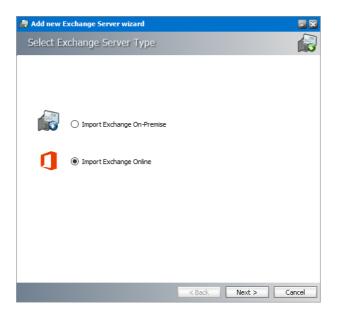
5. Click **Finish** to start the import process. The *Creating objects* window opens. You can click **Back** to select more servers to add or remove some of the selected servers.

Creating objects	
Progress:	
Processing started Importing server: AMX16EXCH Server imported Exchange server permissions have been set	^
Processing finished	

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.

🙀 Add new Exchange Server wizard	
Service account for O365 Exchange server import	
Username (must be an O365 admin):	
administrator@democompany.onmicrosoft.com	
Password:	

< Back Next >	Cancel

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

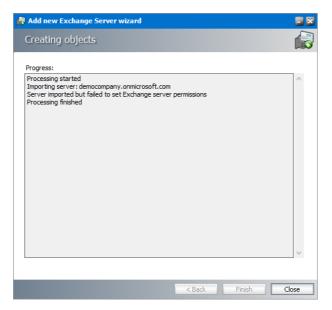
Ŕ	Add new Exchange Server wizard		- ×
	Available Exchange Servers		
	Servers: 1 new servers / 0 imported servers		
	Server Name	Exchange Version	
	democompany.onmicrosoft.com	Office 365	
	<u> </u>		
	Set Exchange Server permissions for admi	inistrator@democompany.onmicrosoft.com	
	Set Public Folders permissions for administ	irator@democompany.onmicrosoft.com	
		< Back Next > Ca	ancel

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.

🙀 Add new Exchange Server wizard			
Summary			
Summary:			
Import the following servers [1] : -democompany.onmicrosoft.com			^
			~
	< Back	Finish	Cancel
			Cancol

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.



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

Steps to verify the imported Microsoft Exchange servers

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

Address book Manager Setup Refresh					
Address book an	nd settings				
🔋 Synchronization	Server name	Version 2016	Access method MAPI	Included Yes	Configuration path LDAP://CN=AMX16EXCH,CN
Servers	democompany.onmicrosoft.com	Office 365	MAPI	Yes	LDAP://CN=Configuration,C
🚳 Groups					
🔄 Mailboxes					
1 m					
	2 servers				

Importing Mailboxes

In this topic:

Options for importing mailboxes

Steps to import mailboxes from on-premise Microsoft Exchange servers

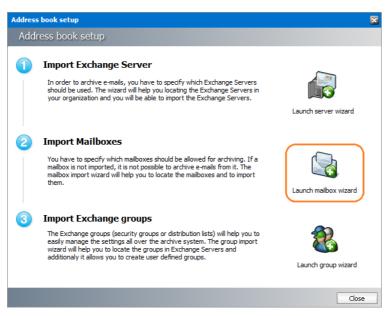
Steps to import mailboxes from online Microsoft Exchange servers

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.



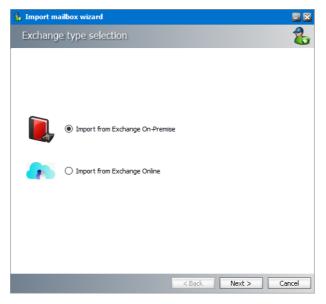
- By using the Mailboxes tab of the Address Book Manager.
 - 1. Open the Address Book Manager.
 - 2. Click the Mailboxes tab.
 - Right-click inside the list view and from the context menu point to Tasks and select Import mailbox wizard... to initiate the import process.

Synchronization	RDN		Display name	Alias	email address	Home ser
🗭 Servers						
🚯 Groups			Tasks 🕨	Import mailb	oox wizard	
Mailboxes	-		Add/Remove columns	Activate mail	lboxes	
~		2	Refresh list	Deactivate m	ailboxes	
		P	Properties	Migrate mail	box	
			Permissions	Purge mailbo	oxes	
				Synchronize	mailbox folder permissions	
				Update mails	boxes	

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.

🐍 Import mailbox wiza	rd 🔤 🔀
Mailboxes - searc	h and select mailboxes to import 💦 🚷
Look for Name:	
	Search
	oca ar
Display Name	Email Address
Administrator	spsadmin@domca.meta.test
Niki Portman	nikiportman@domca.meta.test
🗹 Ishna Mohan	ishnamohan@domca.meta.test
🗹 Nina Tanaka	ninatanaka@domca.meta.test
Pablo Neruda	pabloneruda@domca.meta.test
Aman Ali	amanali@domca.meta.test
Juan Christie	juanchristie@domca.meta.test
Devika Sharma	devikasharma@domca.meta.test
🗌 Karl Jordan	karljordan@domca.meta.test
Tim Ashford	timashford@domca.meta.test
David Webb	davidwebb@domca.meta.test
L	
	< Back Next > Cancel

- 3. 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.
- 4. Select one or more mailboxes that you want to import.
 - **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-exisiting mailboxes, they will be updated during the import process.
- 5. Click **Next**. The *Summary* window opens that lists the mailboxes from the on-premise Microsoft Exchange servers that will be imported.

Import mailbox wizard		
iummary		2
ummary:		
mport the following mailboxes [4] : - Administrator - Niki Portman - Ishna Mohan - Nina Tanaka		^

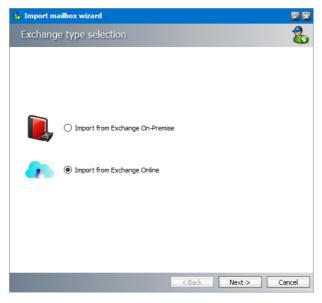
6. Click **Finish** to start the import process. The *Creating Object* window opens. You can click **Back** to select more mailboxes to add or remove some of the selected mailboxes.

• Import mailbox wizard Creating objects				- ×
Progress: Processing started Importing mailbox: Administrator Mailbox imported Importing mailbox: Niki Portman Mailbox imported Importing mailbox: Sihna Mohan Mailbox imported Importing mailbox: Nina Tanaka Mailbox imported Processing finished				~
	< Ba	ck	Finisl	Close

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.



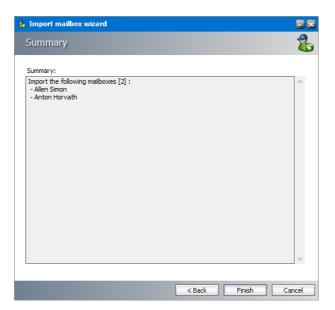
2. Click **Next**. The *Exchange Online* window opens. Select the desired Office 365 instance.

🀍 Import mailbox wizard			= ×
Exchange Online			8
Select Office 365 tenants:			
Server Name			
democompany.onmicrosoft.com			
	< Back	Next >	Cancel

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

🐍 Import mailbox wizard		
Mailboxes - search ar	nd select mailboxes to import	8
Look for Name:	Search	
Mailboxes: 4 new mailboxes / 0	old mailboxes	
Display Name Allen Simon Anton Horvath Arnav Sharma Ashton McGrath	Email Address allensimon@democompany.onmicrosoft.com antonhorvath@democompany.onmicrosoft.com arnavsharma@democompany.onmicrosoft.com ashtonmcgrath@democompany.onmicrosoft.com	
	< Back Next > Ca	incel

- 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.
 - **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-exisiting 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.

, Import mailbox wizard			
Creating objects			2
Progress:			
Processing started Importing mailbox: Allen Simon Mailbox imported Importing mailbox: Anton Horvath Mailbox imported Processing finished			^
			~
	< Back	Finish	Close

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.

Address book ar	d settings				
N	RDN	Display name	Alias	email address	Home server
🛃 Synchronization	🖳 spsadmin	Administrator	spsadmin	spsadmin@democompany	AMX 16EXCH
	Dublic_MetalogixS	public_MetalogixSoftware	public_Metalogi	public_MetalogixSoftware6	democomp
🗣 Servers	Dublic_AMX16EXCH	public_AMX 16EXCH	public_AMX16E	spsadmin@democompany	AMX 16EXCH
	🖳 ninatanaka	Nina Tanaka	ninatanaka	ninatanaka@democompan	AMX 16EXCH
👯 Groups	🗟 nikiportman	Niki Portman	nikiportman	nikiportman@democompan	AMX16EXCH
•	🖄 ishnamohan	Ishna Mohan	ishnamohan	ishnamohan@democompan	AMX16EXCH
Mailboxes	allensimon 🗟 antonhorvath	Allen Simon Anton Horvath	allensimon antonhorvath	allensimon@democompan antonhorvath@democompan	democomp
R	< 8 mailboxes				2

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

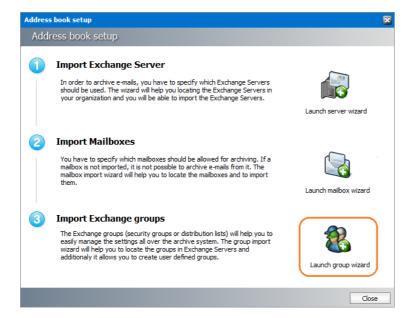
Steps to import groups from online Microsoft Exchange servers

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.



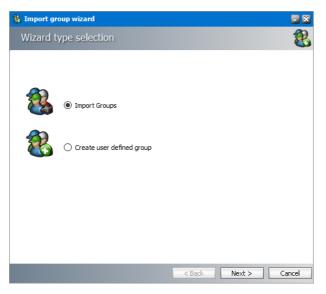
- By using the Groups tab of the Address Book Manager.
 - 1. Open the Address Book Manager.
 - 2. Click the Groups tab.
 - 3. Right-click inside the list view and from the context menu point to **Tasks** and select **Add** group wizard... to initiate the import process.

^{Setup Refresh} Address book ar	nd settings						
Synchronization	RDN	C	isplay name	Alias		email address	Gro
💭 Servers 🚷 Groups							
Nailboxes 🖌		२ न इंड्रे	iasks Add/Remove columns Aefresh Properties		Add group wiza Purge group	rd	
	<						

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.



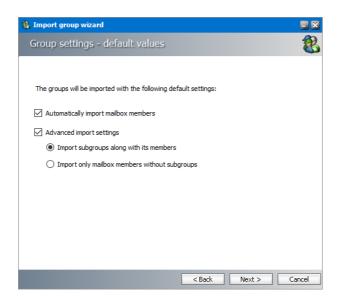
2. Click Next. The *Exchange type selection* window opens. Select Import form Exchange On-Premise.

🍓 Import gro	oup wizard			- ×
Exchange	e type selection			2
	Import from Exchange On-Premise	e		
	O Import from Exchange Online			
		< Back	Next >	Cancel

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

🍓 Import group wizard		- X
Groups - search and select group	os to import	8
Look for Name:		
D		Search
Groups: 10 new groups / 0 imported groups	Security gro	
		up
Domain Computers	True	
Domain Controllers	True	
Domain Admins	True	
Domain Users	True	
Domain Guests	True	
Denied RODC Password Replication Group	True	
DnsAdmins	True	
DnsUpdateProxy	True	
Discovery Management	True	
Delegated Setup	True	
L		
	< Back Ne	xt > Cancel

- 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 wit the letter D will be returned in the search results list.
- 5. Select one or more groups that you want to import.
 - **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-exisitng 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.

🎎 Import group wizard			
Summary			8
Summary:			
Import the following groups [2] : - Domain Admins - Domain Users			^
	< Back	Finish	Cancel

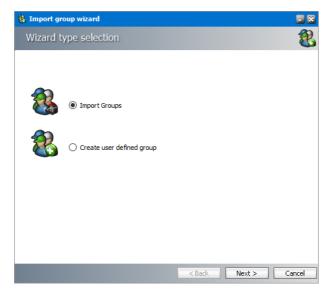
9. Click Finish to start the import process. The Creating Object window opens.

Import group wizard			
Creating objects			2
Progress:			
Processing started Importing group: Domain Admins Group imported			^
 New mailbox members imported = 0 New subgroups imported = 0 			
Importing group: Domain Users Group imported			
- New mailbox members imported = 7 - New subgroups imported = 0			
Processing finished			
			~
	< Back	Finish	Close

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**.

🄱 Import group wizard			
Exchange type selection			22
O Import from Exchange On-Premise	:		
Import from Exchange Online			
	< Back	Next >	Cancel

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

🍓 Import group wizard			- ×
Exchange Online			8
Select Office 365 tenants:			-
Server Name			
democompany.onmicrosoft.com			
	< Back	Next >	Cancel

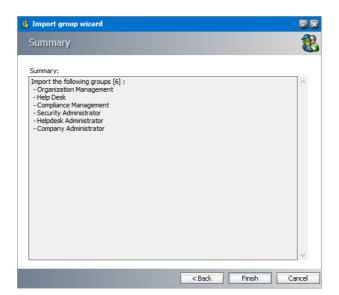
4. Click **Next**. The *Groups - search and select groups to import* window opens.

Import group wizard		
Groups - search and select groups to imp	ort	2
Look for Name:		
	Search	
Groups: 41 new groups / 0 imported groups		
Display Name	Security group	^
Organization Management	True	
Recipient Management	True	
View-Only Organization Management	True	
🗹 Help Desk	True	
Records Management	True	
Discovery Management	True	
Hygiene Management	True	
Compliance Management	True	
UM Management	True	
RIM-MailboxAdminsd94a65c903754f75953aa790c0391	True	~
ζ		, [*]
< Bac	k Next> C	ancel

- 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.
 - **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

鑬 Import group wizard	- 8
Group settings - default values	8
The groups will be imported with the following default settings:	
Automatically import mailbox members	
Advanced import settings	
 Import subgroups along with its members 	
O Import only mailbox members without subgroups	
< Back Next >	Cancel

- 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.

8 Import group wizard			= ×
Creating objects			8
Progress:			
Importing group: Compliance Management Group imported			
 New mailbox members imported = 0 New subgroups imported = 0 			
Importing group: Security Administrator Group imported			
- New mailbox members imported = 0 - New subgroups imported = 0			
Importing group: Helpdesk Administrator Group imported			
- New mailbox members imported = 0 - New subgroups imported = 1 Processing finished			
			*
	< Back	Finish	Close

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.

🍓 Import gr	oup	wizard			
Wizard t	ype	selection			2
8 2	0	Import Groups			
	0	Create user defined group			
		Group Name:			
		Demo Group			
			< Back	Next >	Cancel

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**.

🍓 Import group wi	izard			= ×
User Defined	Group - Add men	nbers to group		8
Look for Name:				Search
Display Name	Email Address		Men	nber Type
		< Back	Next >	Cancel

- 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.
 - **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.

	Froup - Add members to group		4
ook for Name:			
		Search	
Exchange Online			
Display Name	Email Address	Member Type	^
Administrator	spsadmin@domca.meta.test	Mailbox	
Niki Portman	nikiportman@domca.meta.test	Mailbox	
Ishna Mohan	ishnamohan@domca.meta.test	Mailbox	
🗸 Nina Tanaka	ninatanaka@domca.meta.test	Mailbox	
Pablo Neruda	pabloneruda@domca.meta.test	Mailbox	
Aman Ali	amanali@domca.meta.test	Mailbox	
Juan Christie	juanchristie@domca.meta.test	Mailbox	
Juan Crinsue	devikasharma@domca.meta.test	Mailbox	
Devika Sharma	Indianal a Olympic material test	Mailbox	
	karljordan@domca.meta.test		\sim
Devika Sharma	timashford@domca.meta.test	Mailbox	

- 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.

🎇 Import group wizard		
Summary		8
Summary:		
Creating manual group: - Demo Group		^
		~
	< Back Finish	Cancel

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.

Import group wizard			
Creating objects			2
Progress:			<u>^</u>
Importing Member - Mailbox: Aman Ali			
Mailbox imported successfully			
<<< Creating Manual Group: Demo Group >>> Manual Group created successfully			
Processing finished			
			\vee
	< Back	Finish	Close

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

📕 Address book Manager					
Setup Refresh					
Address book an	id settings				
	RDN	Display name	Alias	email add	Group type
🛃 Synchronization	<table-of-contents> Company Administrator</table-of-contents>	Company Administrator	Company Administrator		auto
	<table-of-contents> Compliance Management</table-of-contents>	Compliance Management	Compliance Management		auto
🕞 Servers	🐉 Demo Group	Demo Group	Demo Group		manual
(AD)	Somain Admins	Domain Admins	Domain Admins		auto
🛛 🚳 Groups	S Domain Users	Domain Users	Domain Users		auto
	🚳 Help Desk	Help Desk	Help Desk		auto
🔄 Mailboxes	Helpdesk Administrator Organization Management	Helpdesk Administrator Organization Management	Helpdesk Administrator		auto auto
2	Security Administrator	Security Administrator	Organization Management Security Administrator		auto
					,
	9 groups				/
	a dronb?				

- 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

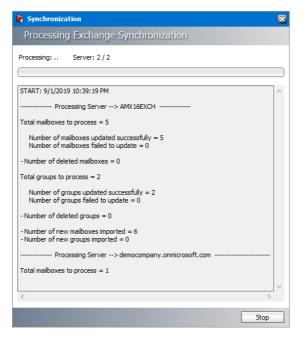
Steps to schedule automatic synchronization

Steps to perform a manual synchronization

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

🔋 Address book Manager		
Setup Refresh		
Address book an	d settings	
Synchronization	Exchange Synchronization	Exchange Permissions Synchronization
😵 Groups	Enable Mailbox Update Enable Group Update	Enable Exchange Mallbox permission sync Enable Mailbox Folder permission sync Enable Public Folder permission sync
	Sync Now Schedule	Sync Now Schedule
	Select servers:	
	Server Name MAX 16EXCH democompany.onmicrosoft.com	
		Apply

- 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.

🔋 Synchronization	×
Processing Exchange Permissions Synchronization	
Processing: Server: 2 / 2	
START: 9/1/2019 10:48:19 PM	^
Processing Server> AMX16EXCH	
> Synchronizing Mailbox Permissions	
Total mailboxes to process = 11	
Number of mailboxes updated successfully = 0 Number of mailboxes failed to update = 11	
> Synchronizing Mailbox Folder Permissions	
Total mailboxes to process = 11	
Number of mailboxes updated successfully = 11 Number of mailboxes failed to update = 0	
Number of folders updated successfully = 171 Number of folders failed to update = 0	
> Synchronizing Public Folder Permissions	
Total public folder mailboxes to process = 1	
Number of public folder mailboxes updated successfully = 0	~
Stop	

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 so or clicking Address Book Manager from the Tools menu.
- 2. The Synchronization tab opens by default.

🔋 Address book Manager		= 🗆 🛛
Setup Refresh		
Address book and	l settings	
Synchronization	Exchange Synchronization	Exchange Permissions Synchronization
🕞 Servers 🚷 Groups	Enable Mailbox Update	Enable Exchange Mailbox permission sync
Nailboxes	Imable Group Update	Enable Mailbox Folder permission sync Enable Public Folder permission sync
	Sync Now Schedule	Sync Now Schedule
	Select servers:	
	Server Name Ø AMX 16EXCH Ø democompany.onmicrosoft.com	
		Apply

- 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.

🔀 Exchange S	Бупс	:hı	го	ni	zat	io	n s	scl	he	du	ıle	er								l	۵	2
Scheduling																						_
autor	nati	e.	sy	119	sio	01	<u>iv</u>	i i	10	11-2	e	i e	dı	ile	-							
Use sched	luled	s	yn	ch	ron	iza	tio	n														
	0				6	j				1	2					18						
Monday						Γ				Τ	Τ	Τ	Γ	Γ								
Tuesday																						
Wednesday										I	Ι	I			Ĺ							
Thursday																						
Friday																						
Saturday																						
Sunday																						
Please mark the hours on the weekly plan when the synchronization should take place																						
													OK	:				C	Tar	nce	:	

- 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.
 - **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).

- <u>Publish Forms to Organizational Forms Library</u>
- Publish Forms to Personal Forms Library

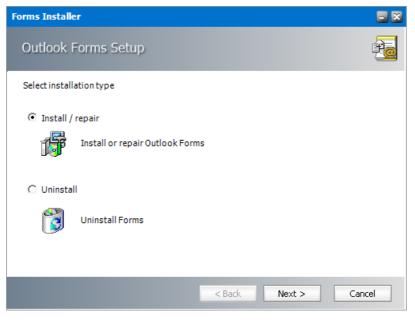
Publish Forms to Organizational Forms Library

In this topic:

- <u>Steps to publish forms to the Organization Forms Library</u>
- Steps to activate Archive Manager forms in mailboxes

Steps to publish forms to the Organization Forms Library

- **NOTE:** It is assumed that the *Organizational Forms Library* exists on the on-premise Exchange Server. For more information see <u>Setup the Organizational Forms Library</u>.
- 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.

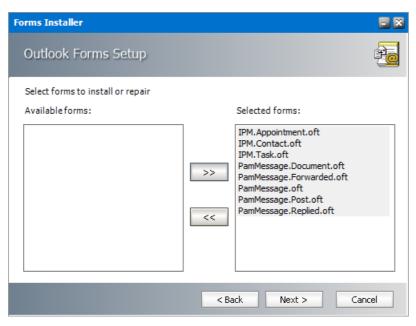


3. Select **Install/repair** and then click **Next**. The *Outlook Forms Setup - Folder Location* window for the form template opens.

Forms Installer	
Outlook Forms Setup	F
Locate the folder, where form templates are stored:	
C:\Program Files (x86)\Metalogix\MAM4Exchange\Tools\Forms\Templates	Browse
< Back Next >	Cancel

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.

Forms Installer	- X
Outlook Forms Setup	P@
Enable/disable Outlook forms events	
Leave the following options checked unless you want the Outlook forms to perform some specific functions. Please consult the installation documentation for more information.	e
 On Open On Reply On Reply to All On Forward 	
< Back Next > Cancel	

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.

Fo	orms I	installer			- ×
	Outl	ook Forms	Setup		F
	orgar for th make Retrie	ization. If you h e same server. sure that this s we Server is use	nave only one Archive Server, If you have a dedicated Retrie	rver name for each location in yo you can provide an alternative n ve Server in the organization, ple y Retrieve Server. The Secondary ailable.	ame ease
	Retr	ieve Servers	Primary Retrieve Server	Secondary Retrieve Server	
	1	1	AMXSERVER-R	AMXSERVER-A	
	*	1		AMAGERVERTA	
			< B	ack Next > Ca	incel

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:

Тороlоду	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

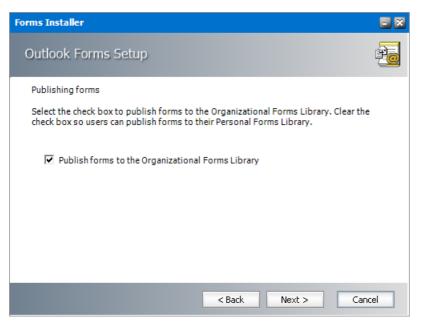
7. Click Next. The Outlook Forms Setup - Retrieval settings window opens.

Forms Installer	- X
Outlook Forms Setup	F <u>o</u>
Retrievalsettings	
If you are not sure with these settings, leave this page unchanged or read the documentation.	
☐ Use SSL (https) in server communication ✓ Open message as read-only	
< Back Next > Can	cel

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.

Forms Installer	
Outlook Forms Setup	<u>F</u>
Summary:	
Please make sure that Outlook is started. You have to log on to the mailbox which has write permissions in the organizational forms library. Please also make sure that Outlook is not in cached mode. The following forms will be published: (from folder: C:\Program Files (x86)\Metalogix \MAM4Exchange\Tools\Forms\Templates) - IPM.Appointment.oft - IPM.Contact.oft - PAmMessage.Document.oft - PamMessage.Forwarded.oft - PamMessage.Forwarded.oft - PamMessage.oft - PamMessage.Replied.oft Entry #1	<
< Back Install Cano	

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.

Forms Installer	- X
Outlook Forms Setup	10
Install progress: File copied. Source: 'C:\Program Files (x86)\Metalogix\MAM4Exchange\Tools\Forms\Templa File copied. Source: 'C:\Program Files (x86)\Metalogix\MAM4Exchange\Tools\Forms\Templa Publishing form: IPM.Appointment.oft OK Publishing form: IPM.Task.oft OK Publishing form: PamMessage.Document.oft OK Publishing form: PamMessage.oft OK Publishing form: PamMessage.oft OK Publishing form: PamMessage.Replied.oft OK Publishing form: PamMessage.Replied.oft OK Publishing form: PamMessage.Replied.oft OK	
<	×
< Back Finish Cancel	

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.

Choose Forr	n	×
Look In: Or	ganizational Forms Library <u>B</u> rowse	
PamMessagi PamMessagi PamMessagi PamMessagi PamMessagi PamMessagi PamMessagi	e e.Document e.Forwarded e.Post	
Display <u>n</u> ame	; PamMessage	Open
<u>F</u> ile name:		Cancel
Description:	Appointment form	<u>A</u> dvanced<<
Contact: Message clas	Version: 3.3000.0035 s: IPM.Appointment.PamMessage	

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**)

Choose F	orm					×
Look in:	Orga	nizational Forms Library		\sim	<u>B</u> rowse	
	age age age age.D age.F age.P					
Display <u>n</u> a	ame:	PamMessage				Open
<u>F</u> ile name	;					Cancel
Descriptio	on:	Note form				<u>A</u> dvanced<<
Contact:			Version:	3.3000.00	35	
Message	class:	IPM.Note.PamMessage				

- 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.
- 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.

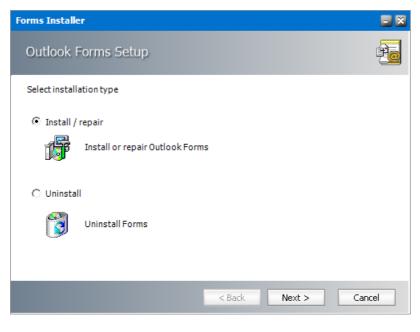
Publish Forms to Personal Forms Library

In this topic:

- <u>Steps to prepare forms for publishing</u>
- 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.

Forms Installer	
Outlook Forms Setup	Pe
Locate the folder, where form templates are stored:	
C:\Program Files (x86)\Metalogix\MAM4Exchange\Tools\Forms\Templates	Browse
< Back Next >	Cancel

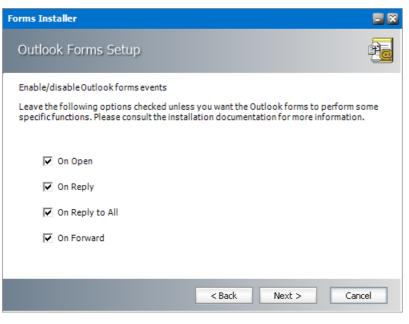
The default location is displayed. Click **Browse** to locate the template folder if you have moved the templates to a different location

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

Forms Installer		- X
Outlook Forms Setup		Po
Select forms to install or repair Available forms:	Selected forms: IPM.Appointment.oft IPM.Contact.oft IPM.Task.oft PamMessage.Document.oft PamMessage.oft PamMessage.oft PamMessage.Replied.oft	
	< Back Next > C	ancel

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

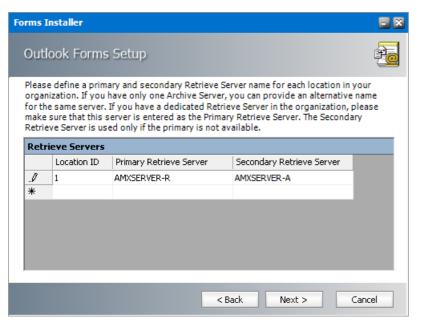
5. Click **Next**. The *Outlook Forms Setup - Enable/disable Outlook forms events* window opens.



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.



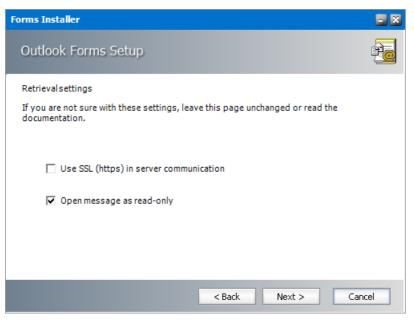
Specify the information as described below:

- 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:

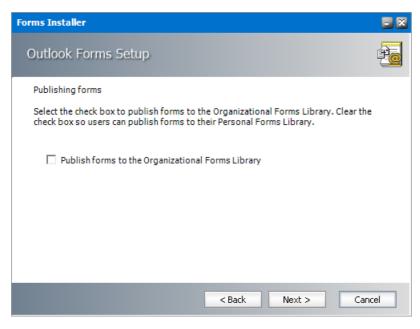
Тороlоду	Primary Retrieve Server	Secondary Retrieve Server
Standalone Archive server	NetBIOS name or IP address of the Archive server (eg. AMXSERVER)	NetBIOS name or IP address of the Archive server (eg. AMXSERVER)
Dedicated Archive and Retrieve servers	NetBIOS name or IP address of the <i>Retrieve</i> 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.

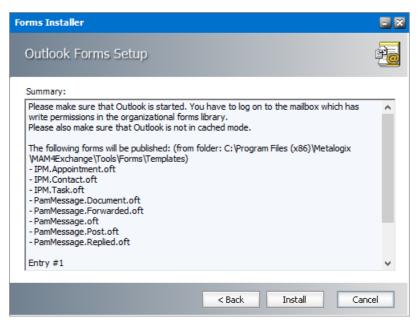


The options are as described below:

- 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.

		-
		Ľ
6)\Metalogix\MAM4	Exchange\Tools\For	ms\Templa
6) (Metalogix (MAM4) 6) (Metalogix (MAM4)	Exchange \Tools \For Exchange \Tools \For	ms\Templa ms\Templa
6) Wetalogix WAM4	Exchange (Tools (For	ms\Templa
		>
	6) (Metalogix (MAM4 6) (Metalogix (MAM4 6) (Metalogix (MAM4 6) (Metalogix (MAM4 6) (Metalogix (MAM4 6) (Metalogix (MAM4	6) Wetalogix WAM4Exchange \Tools \For 6) Wetalogix WAM4Exchange \Tools \For

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

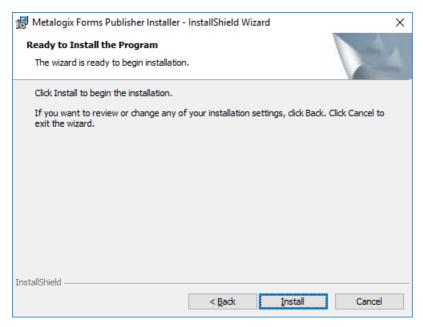
1. Open <Media-folder>\Archive Manager Installation Package\Exchange\Addin and run the Archive Manager Forms Publisher Setup.msi installer.

ៅ Metalogix Forms Publisher Installer - InstallShield Wizard 🛛 🗙				
	Welcome to the InstallShield Wizard for Metalogix Forms Publisher Installer			
	The InstallShield(R) Wizard will allow you to modify, repair, or remove Metalogix Forms Publisher Installer. To continue, dick Next.			
	< Back Next > Cancel			

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

🖟 Metalog	jix Forms Publisher Installer -	InstallShield W	izard	×	
Destination Folder Click Next to install to this folder, or click Change to install to a different folder.					
Þ	<u>C</u> hange				
InstallShield -					
THISTONIAL INCLU-		< <u>B</u> ack	<u>N</u> ext >	Cancel	

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



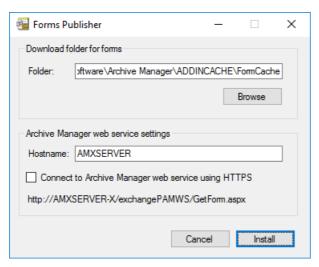
4. Click **Install**. When the installation completes, the *InstallShield Wizard Completed* window opens.

🖟 Metalogix Forms Publisher Ins	staller - InstallShield Wizard	Х
	InstallShield Wizard Completed	
	The InstallShield Wizard has successfully installed Metalogix Forms Publisher Installer. Click Finish to exit the wizard.	
	⊡ Launch Forms Publisher	
	< <u>B</u> ack <u>Finish</u> Cancel	

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* form the *Start menu* > *Metalogix* > *Form Publisher*. The *Forms Publisher* window opens.



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

😼 Forms Publisher 🦳 —		×
PamMessage.Forwarded.oft downloaded successfully PamMessage.Document.oft downloaded successfully PamMessage.Post.oft downloaded successfully IPM.Appointment.oft downloaded successfully IPM.Task.oft downloaded successfully IPM.Task.oft downloaded successfully PamMessage.oft published succesfully PamMessage.Replied.oft published succesfully PamMessage.Document.oft published succesfully PamMessage.Post.oft published succesfully PamMessage.Post.oft published succesfully PamMessage.Post.oft published succesfully PamMessage.Post.oft published succesfully PamMessage.Post.oft published succesfully IPM.Appointment.oftIPM.Contact.oftIPM.Task.oft All forms done		~
Close	Install	

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

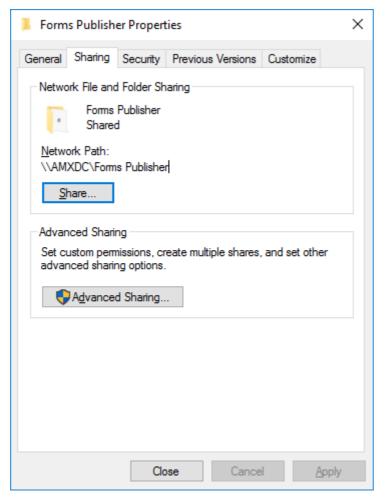
Steps to use the Group Policy Object (GPO) to publish forms

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

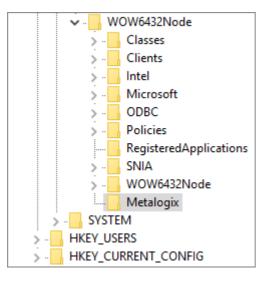


3. Copy and paste the Archive Manager Forms Publisher Setup.msi installer to your shared folder. This file is already in your Archive Manager server at this location: <shared-media-folder>\Archive Manager Installation Package\Exchange\Addin

🧾 Open				×
← → ~ ↑ 📮 \\AMX	DC\Forms Publisher	v Ö	Search Forms Publisher	م
Organize 🔻 New folder				•
Documents	Name	Date modified	Туре	Size
👆 Downloads	🔂 Archive Manager Forms Publisher Setup	5/28/2020 10:49 AM	Windows Installer	2,519 KB
 Music Pictures Videos Windows (C:) Temporary Stora Network 				
	<			>
File <u>n</u> ar	me: Archive Manager Forms Publisher Setup.msi	~	Windows Installer packa	ages (*.r ∨ Cancel

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.
- 4. 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

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

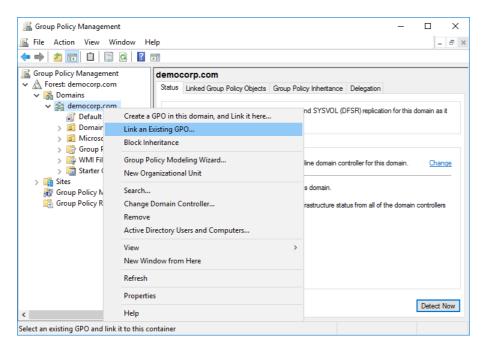
Group Policy Management				- 🗆 X
<u> F</u> ile <u>A</u> ction <u>V</u> iew <u>W</u> indow <u>H</u> e 🗢 🔿 🖄 📷 🞑 月	ap			- 8 :
Group Policy Management ▲ Forest: democorp.com → B Dorains → B Default Domain Policy → C Default Domain Policy → Default Domain Policy → Domain Controllers → Domain Controllers → Domain Controllers → Microsoft Exchange Se → Group Policy Objects → Sites → Group Policy Modeling ← Group Policy Results	Group Policy Objects in Contents Delegation Name Policy Default Domain Controller Default Domain Policy	GPO Status	M WMI Filter None None	Modified 10/1/2019 1:32: 9/28/2019 12:1
<>	<			>

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

New GPO		×
<u>N</u> ame:		
Publish Archive Manager Forms		
Source Starter GPO:		
(none)		~
	ОК	Cancel

Enter the information as described below:

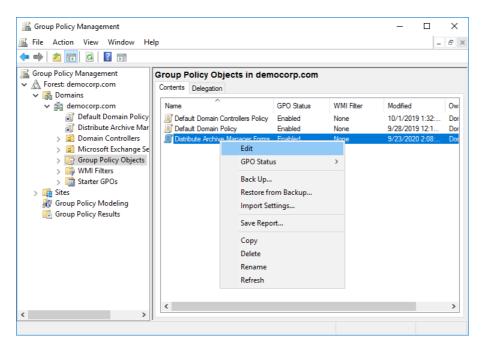
- a. Name enter a unique name to describe the policy. For example, enter Publish Archive Manager Forms.
- b. Source Starter (none).
- 8. Click **OK** to save the new GPO.
- 9. Right click your domain name and then click **Link an Existing GPO** from the context menu. The *Select GPO* window opens.



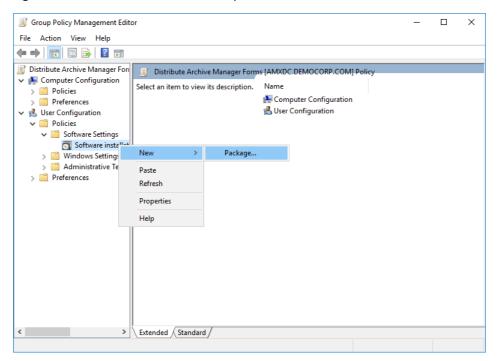
10. Choose the GPO that you created and then click OK.

Select	t GPO	×
<u>L</u> ook i	in this domain:	
	democorp.com	\sim
<u>G</u> roup	Policy objects:	
	Name	
	Default Domain Controllers Policy	
	Default Domain Policy Publish Archive Manager Forms	
		_
	OK Cancel	

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.

🗐 Open				×
A A A A	/IXDC\Forms Publisher	∨ Ö	arch Forms Publisher	م ر
Organize 🔻 New fold	ler			
Documents ^	Name	Date modified	Туре	Size
Downloads Music	🔂 Archive Manager Forms Publisher Setup.msi	9/25/2020 12:34 PM	Windows Installer	2,533 KE
 Pictures Videos Windows (C:) Temporary Stora Network 	٢			>
File <u>r</u>	aame: Archive Manager Forms Publisher Setup.msi	~ [/indows Installer packa <u>O</u> pen C	ges (*.r ∨ Cancel

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

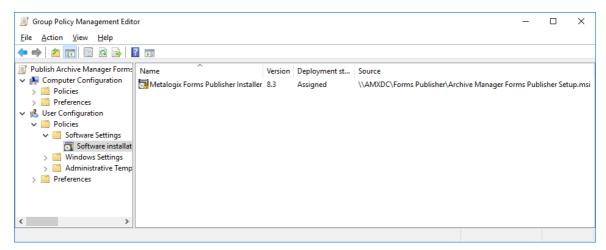
Deploy Software	×
Select deployment method:	
<u>○ P</u> ublished	
○ <u>A</u> ssigned	
Advanced	
Select this option to configure the Published or Assigned options and to apply modifications to a package.	
OK Cancel	

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

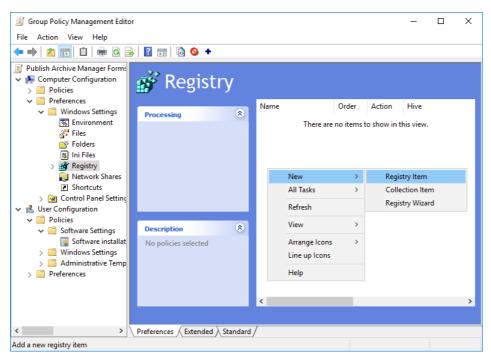
Metalogix Forms Publisher Installer Properties ? X						
General Deployment	Upgrades	Categories	Modifications	Security		
Deployment type <u>P</u> ublished A <u>s</u> signed						
Deployment options Auto-install this Uninstall this ap management Do not display t panel	plication whe	en it falls out o	of the scope of	is control		
	Install this application at logon					
Installation user interface options O <u>B</u> asic (installation user interface options) (installation user interface options)						
Ad <u>v</u> anced						
			ОК	Cance	el	

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.

New Registry Properties X					
General	Common				
Š	Ac <u>ti</u> on:	Create	~		
<u>H</u> ive:		HKEY_LOCAL_MACHINE	~		
Key Pat	h:	SOFTWARE\WOW6432Node\Metalogix			
-Value r	name				
De	e <u>f</u> ault	DownloadFormsService			
<u>V</u> alue ty	pe:	REG_SZ	~		
Va <u>l</u> ue da	ita:	http://AMXSERVER/ExchangePAMWS/GetFo	rm.asp		
	0	K Cancel <u>A</u> pply	Help		

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.
- **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 rightpane 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.

Process	ing result	×
1	Processing finished. Number of items: 1 Processed items: 1	ОК

9

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.

Archive Manager Installation W	d		×
WELCOME	Setups		<u>Help</u>
PLANNING INSTALLATION	Archive Manager Universal Access Se Archive Manager Universal Access Ins		^
tools Setups	Archive Manager for Exchange OWA Archive Manager for Exchange OWA		
	Archive Manager SMTP Service Setury Archive Manager SMTP Service Insta		
	Archive Manager PST Gatherer Setup Archive Manager PST Gatherer Install		
	Archive Manager Outlook Addin x86 S Archive Manager Outlook Addin helps	etup Version 8.3.0 you archive and restore emails in your Outlook	
	Archive Manager Outlook Addin x64 S Archive Manager Outlook Addin helps	ietup Version 8.3.0 you archive and restore emails in your Outlook	
	Archive Manager Outlook Addin 2010 Archive Manager Outlook Addin helps	x86 Setup Version 8.3.0 you archive and restore emails in your Outlook	
	Archive Manager Outlook Addin 2010 Archive Manager Outlook Addin helps	x64 Setup Version 8.3.0 you archive and restore emails in your Outlook	
Metalogix	Archive Manager Forms Publisher Setu Metalogix Forms Publisher	vp Version 8.3.0.1	~

- 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

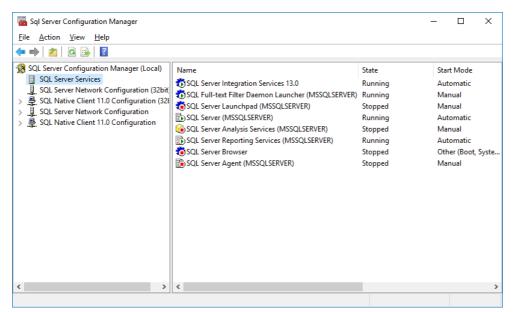
- Creating an MS SQL database with a database user
- Organizational Forms Library troubleshooting
- License Activation

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.

.og On	Service	Advanced			
🖯 Ger	neral				
Bin	ary Path		"C:\Program Files (x86)\Micro	soft S	
	or Contro	I	1		
Exit	t Code		1077		
Ho	st Name		AMXDB		
Na			SQL Server Browser		
	cess ID		0		
	L Service T	ype			
	rt Mode		Disabled		
State			Automatic		
			Disabled		
			Manual		
Start I		of this service.			

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.

🔚 Sql Server Configuration Manager				-		×	
File Action View Help							
🗢 🔿 🚈 🖼 🗟 👔							
SQL Server Configuration Manager (Local)	Protocol Name	Status					
SQL Server Services	🚡 Shared Memory						
> B SQL Native Client 11.0 Configuration (32)	🐨 Named Pipes	Disabled	5.11				
✓	TCP/IP	Enabled	Enable				
Protocols for MSSQLSERVER			Disable				
> 💂 SQL Native Client 11.0 Configuration			Properties				
			Help				
< >							
Enable selected protocol.							

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**.

TCP/IP Propert	ties			?	×
Protocol IP A	ddresses				
General					
Enabled		Yes			-
Keep Alive	2	30000			
Listen All		Yes			
Enabled					
Enable or dis	sable TCP/IP proto	col for this se	rver instance		
	OK	Cancel	<u>A</u> pply	H	lelp

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.

		TCP/IP F	Properties	?	X
Protocol	IP Addresses				
E P1	,				
Active	:		Yes		
Enabl	ed		No	•	
IP Add	dress		Yes	N] _
TCP D	ynamic Ports		No	hà	
TCP Pe	ort				
⊟ ⊪2					
Active	:		Yes		
Enabl	ed		No		
IP Add	dress		fe80::10ea:81af:1bfe:8a	ad1%12	
TCP D	ynamic Ports				
TCP Po	ort		1433		
🗆 IP3					
Active	:		Yes		
Enabl	ed		No		
IP Add	dress		10.16.100.98		
	ynamic Ports				
TO D	ort		1/133		Ť
Enabled Enable o	r disable the ll	Paddress			
	ОК	Ca	ncel Apply	Hel	P

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**.

	TCP/IP Pro	opertie	es		?	X
Protocol IP Addresses						
□ P 1						~
Active	Y	'es				
Enabled	Y	'es				
IP Address	1	92.168.2	27.2			_
TCP Dynamic Ports	C)				≡
TCP Port						
🗄 IP2						
Active	γ	'es				
Enabled	N	٩o				
IP Address	f	e80::10e	a:81af:1bfe:	8ad1%	12	
TCP Dynamic Ports						
TCP Port	1	433				
🖂 IP3						
Active	γ	'es				1
Enabled	N	٩o				
IP Address	1	0.16.100).98			
TCP Dynamic Ports						
TCP Port						\sim
TCP Date TCP Dynamic Ports Blank, if dynamic port		ed. To u	se dynamic	ports, s	et to	о.
TCP Dynamic Ports Blank, if dynamic port	s are not enabl	ed. To u		ports, s		
TCP Dynamic Ports		ed. To u	se dynamic Apply	ports, s	et to Hel	
TCP Dynamic Ports Blank, if dynamic port	s are not enabl	ed. To u		ports, s		
TCP Dynamic Ports Blank, if dynamic port	s are not enabl	ed. To u		ports, s		
TCP Dynamic Ports Blank, if dynamic port	s are not enabl Canc	ed. To u		ports, s		
TCP Dynamic Ports Blank, if dynamic port	s are not enabl Canc	ed. To u		ports, s		
TCP Dynamic Ports Blank, if dynamic port OK //P Properties tocol IP Addresses	s are not enabl	ed. To u		ports, s		
TCP Dynamic Ports Blank, if dynamic port OK /IP Properties tocol IP Addresses	s are not enabl	ed. To u		ports, s		
TCP Dynamic Ports Blank, if dynamic port OK /IP Properties tocol IP Addresses	s are not enabl	ed. To u		ports, s		
TCP Dynamic Ports Blank, if dynamic port OK /IP Properties tocol IP Addresses	s are not enabl	ed. To u		ports, s		
TCP Dynamic Ports Blank, if dynamic port OK /IP Properties tocol IP Addresses	s are not enabl	ed. To u		ports, s		
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TCP Dynamic Ports Blank, if dynamic port OK /IP Properties tocol IP Addresses	s are not enabl	ed. To u		ports, s		
TCP Dynamic Ports Blank, if dynamic port OK /IP Properties tocol IP Addresses	s are not enabl	ed. To u		ports, s		
TCP Dynamic Ports Blank, if dynamic port OK //P Properties tocol IP Addresses IPAII TCP Dynamic Ports 0 TCP Port 1433	s are not enabl	ed. To u		ports, s		
TCP Dynamic Ports Blank, if dynamic port OK //P Properties tocol IP Addresses IPAII TCP Dynamic Ports 0 TCP Port 1433	s are not enabl	ed. To u		ports, s		
TCP Dynamic Ports Blank, if dynamic port OK //P Properties tocol IP Addresses IPAII TCP Dynamic Ports 0 TCP Port 1433	s are not enabl	ed. To u		ports, s		

- 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.
- 8. 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.

Sql Server Configuration Manager			-	×
<u>File Action View H</u> elp				
🗢 🔿 🚈 🖾 🔍				
 SQL Server Configuration Manager (Local) SQL Server Services SQL Server Network Configuration (32bit) SQL Server Network Configuration (32bit) SQL Server Network Configuration Protocols for MSSQLSERVER Client Protocols Aliases 	Order 1 2 3	Enabled Enabled 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**.

đ		New	Database		_ □ X
Select a page Ceneral	🔄 Script 👻 🛐	Help			
🚰 Options 🚰 Filegroups	Database name:		exchangeD	В	
	Owner:		<default></default>		
	👿 Use full-text in	idexing			
	Database files:				
	Logical Name	File Type	Filegroup	Initial Size (MB)	Autogrowth / Maxsize
	exchangeDB exchangeD	Rows Log	PRIMARY Not Applicable	3	By 1 MB, Unlimited By 10 percent, Unlimited
	exchanged	LUY	мосяррісаріе	1	by to percent, oriunited
Connection					
Server: 70DB2					
Connection: 70DEM02\Administrator					
View connection properties					
Progress					
Ready	<	III		Add	Remove
					OK Cancel

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.

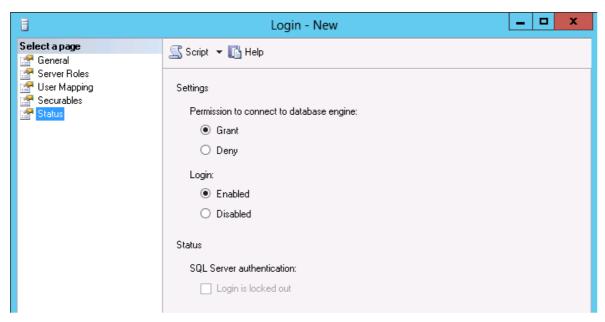
8	Login -	New		_ 🗆 X
Select a page	🕵 Script 👻 📑 Help			
Server Roles User Mapping Securables Status	Login name: Windows authentication SQL Server authentication Password:	srv_exchange		Search
	Confirm password:			
	 Enforce password policy Enforce password expira User must change password Mapped to certificate 	tion		
	 Mapped to asymmetric key 			× ▼
Connection	Map to Credential			✓ Add
Server: 70DB2	Mapped Credentials	Credential	Provider	_
Connection: 70DEM02\Administrator <u>View connection properties</u>				
Progress				Remove
O Ready	Default database: Default language:	exchangeDB English		
			OK	Cancel

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

5. 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.

đ	Login -	New	_	D X
Select a page	🖾 Script 🔻 🚺 Help			
Server Roles	Users mapped to this login:			
🚰 Securables 🖙 Status	Map Database	User	Default Schema	
E Status	💽 exchangeDB	srv_exchange		
	master			
	msdb			
	ReportServer			
	ReportServerTempDB			
	tempdb			
Connection	Guest account enabled for: exc			
Server:	db_accessadmin db_backupoperator			
70DB2	db_datareader			
Connection:	db_datawriter			
70DEM02\Administrator	db_ddladmin db_denydatareader			
View connection properties	db_denydatawriter			
	✓ db_owner			
Progress	db_securityadmin			
Ready	✓ public			
			ОК	Cancel

6. 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**.

3	Schema - New	-		x
Select a page General Permissions Extended Properties	Scrieff - New Scrieff - Rep A schema contains database objects, such as tables, views, and stored procedures. can be a database user, a database role, or application role. Schema name: srv_exchange Schema owner: srv_exchange		ema ou	
Connection Server: 70DB2 Connection: 70DEM02\Administrator Image: View connection properties				
Progress Ready	ОК		Cance	

8. 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**".

Ũ	Database User - exchange 📃 🗖 🗙
Select a page General	🕵 Script 👻 🎼 Help
Membership	User type:
Securables Extended Properties	SQL user with login
	User name: srv_exchange
	Login name:
	srv_exchange
	Default schema: 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**.

0	Database User - exchange		x
Select a page General Owned Schemas Membership Securables Extended Properties	Database osel - exchange Script - I Help Database role membership: Role Members db_accessadmin db_backupoperator db_datareader db_datawriter db_ddladmin db_denydatareader db_denydatawriter		
	✓ db_owner □ db_securityadmin		

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

Proxy server				×
Enable proxy Server name: User name: Password:]	Port:	0	
	[Set	Close	

- 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

Activate	License Key	×
9	Enter your Activation Response To activate your product offline mode, paste the Activation Response or load it from file saved on the Activation web page. If you do not have the Activation Response go to previous wizard page and follow the instructions there. Once entered the Activation Response, dick	
	"Next". Activation Response: Load from file	
	p2Ev +bx3XYOKpoyX5Sz8y96I9ABE9XNCGLkgVhAx7NuiH2lWIBpBK1AtEilz6 vHpJiW4fxmizEZ/D24FDsZMdA +1kyhlzNaBfYWY/XtkrUwn3YfDdAFMEExYSsUvDwCUvnG1uMOHQsT GddkqT+oKvgiGX4LccThDGPf4/lheOowM9NXfWTw3f	
	<pre></pre>	

- 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.

About Us

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

Contacting Quest

For sales or other inquiries, visit <u>www.quest.com/contact</u>.

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