Metalogix® Archive Manager for Files 8.3

ArchiveWeb Manual

Metalogix® Archive Manager for Files
Updated November 2020
Version 8.3

Contents

About ArchiveWeb

This application is used for viewing archived emails and files over the Internet. A user can access archived items through a web browser by navigating to the ArchiveWeb using the URL `http://<ArchiveWebServerName>/archiveweb`.

With mobile device support your archive is at hand virtually anywhere. Mobile form factoring and simplified navigation contribute to the ease of use.

Functions:

- Browsing archived emails (archived by Archive Manager for Exchange) and files (archived by Archive Manager for Files)

- Full-text search (optional)

- Database search (optional) - allows searching for archived items using query-builder capabilities.

- Search template

Requirements

System requirements

- Windows Server 2012, Windows Server 2012 R2, Windows Server 2016 or Windows Server 2019

- .NET Framework 4.6.1 (https://www.microsoft.com/en-us/download/details.aspx?id=49981)

i | **NOTE:** For the Windows servers listed above, verify that the **.NET Framework 4.5 Features / WCF Services / HTTP Activation** is checked under **Server Manager** > **Add Roles and Features Wizard.**

Supported browsers

- MS Internet Explorer 11

- Mozilla Firefox 69 and later

- Google Chrome 76 and later

- Opera 63 and later

- Microsoft Edge

IIS configuration

Please make sure you have installed the fix for MVC applications – follow the link below to find appropriate update according to your OS:

- http://support.microsoft.com/kb/980368

When you find you are unable to browse MVC application, you can try to register the framework for IIS by running the followings commands:

- %windir%\Microsoft.NET\Framework64\v4.0.30319\aspnet_regiis.exe –ir

- IIsreset

If required, uncheck "Require SSL" in IIS's SSL Settings for ArchiveWeb.

Installation

Archive Manager ArchiveWeb must be installed on the same machine that hosts the Archive Manager for Exchange or Archive Manager for Files server. Installing Archive Manager ArchiveWeb on another computer is not supported.

ArchiveWeb can be installed in one of two ways:

* automatically, by choosing the ArchiveWeb component from the unified product installer. This method installs ArchiveWeb on the same server where Archive Manager is installed.

* manually, using the *Archive Manager ArchiveWeb setup.exe* file. This method allows you to manually install ArchiveWeb on any web server in the domain where Archive Manager is installed.

In this chapter:

Steps to install automatically with the product installer

Steps to install manually with the ArchiveWeb installer

Steps to install automatically with the product installer

1. Login with the credentials of the **administrator** (eg. **democorp\domadmin**) to the Archive Manager for Files server.

2. Download and unzip the installer if it is not already available.

3. Run the setup file `<install-media-folder>\ArchiveWeb\Archive Manager ArchiveWeb setup.exe` to start the ArchiveWeb installer wizard.

4. If the installer does not start immediately, run the **MAMInstaller.exe** from your install media folder. The *Welcome* window opens.
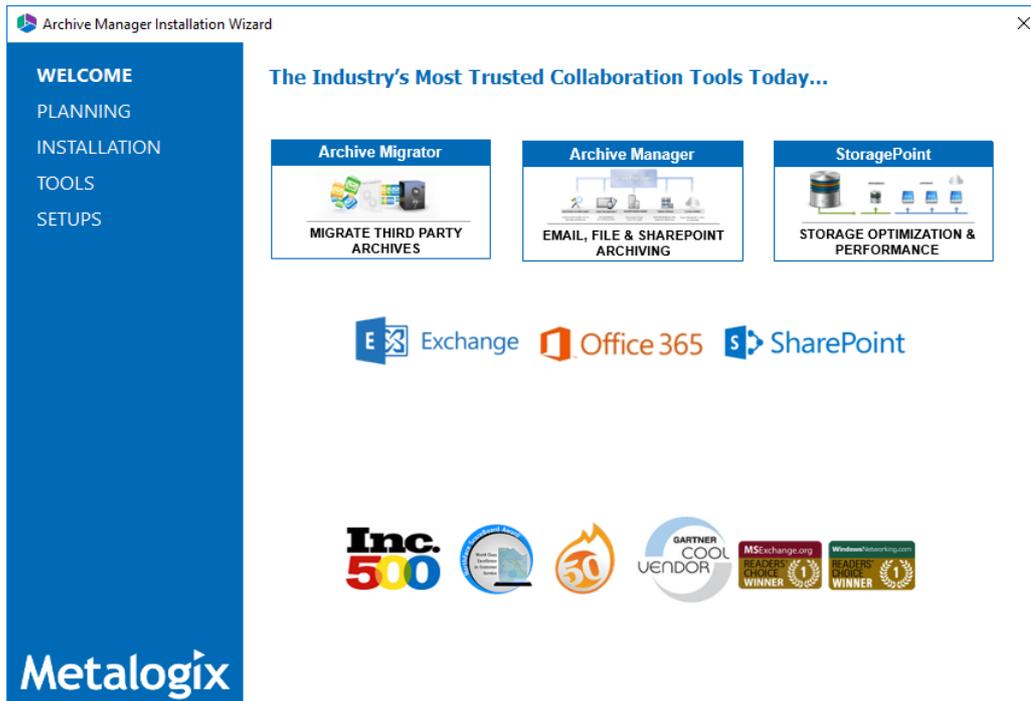
5. From the navigation panel on the left, click **INSTALLATION**. The *Server Installation* window opens.
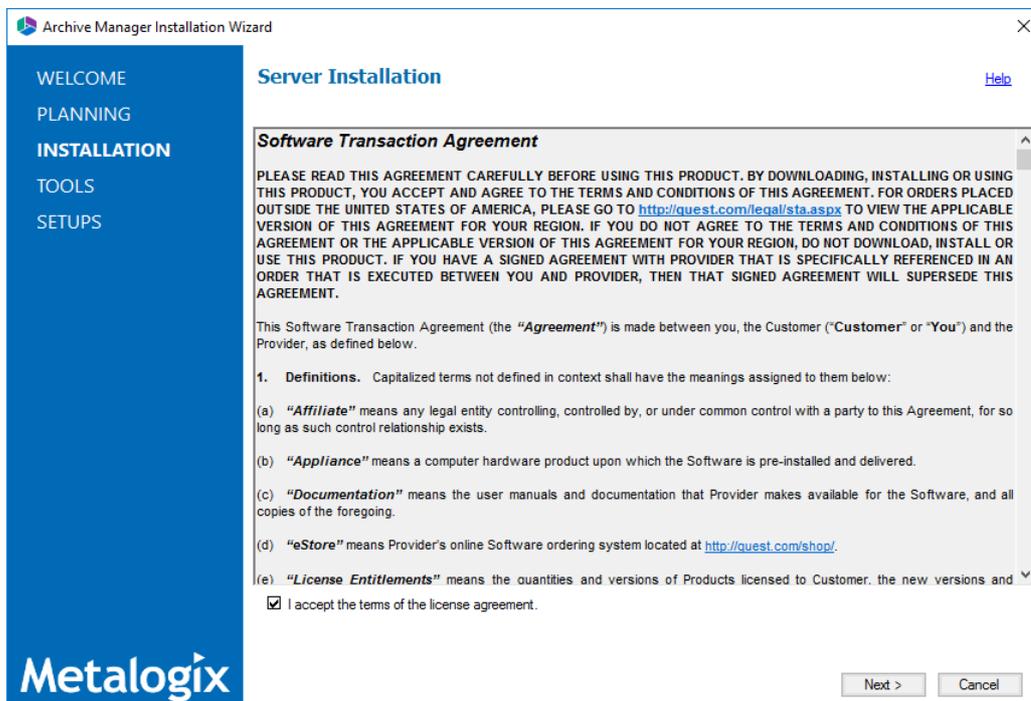
Read the **Software Transaction Agreement**. If you wish to proceed, select the **I accept the terms of the license agreement** check box.

6. Click **Next**. The *Installation Mode* window opens. Select the **Advanced installation** option
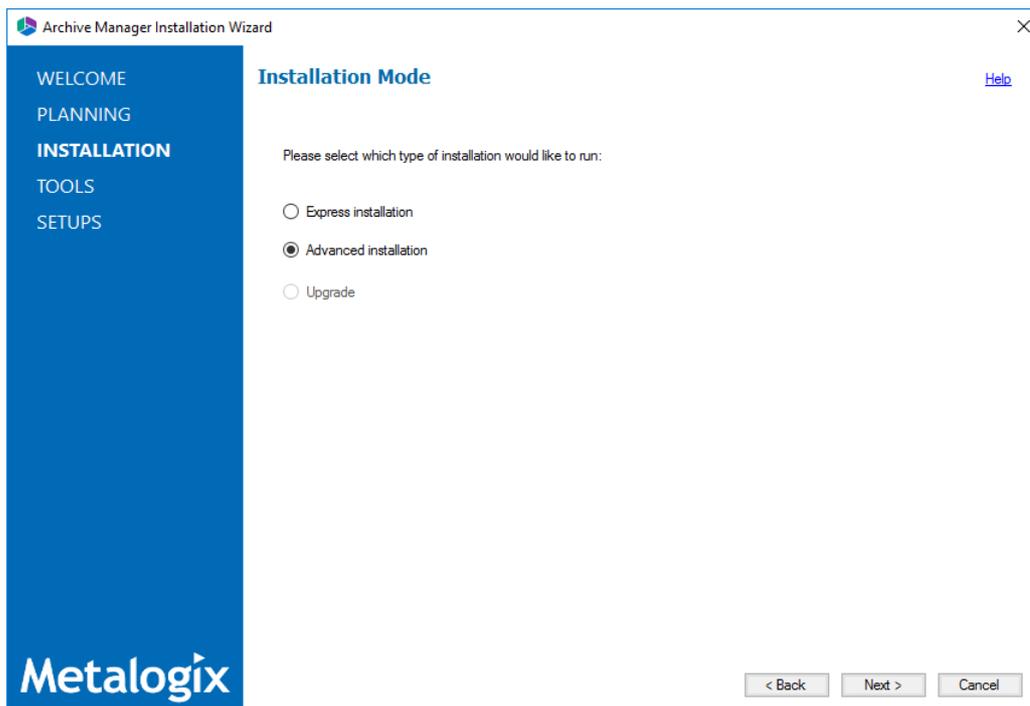
7. Click **Next**. The *Installation Components* window opens.
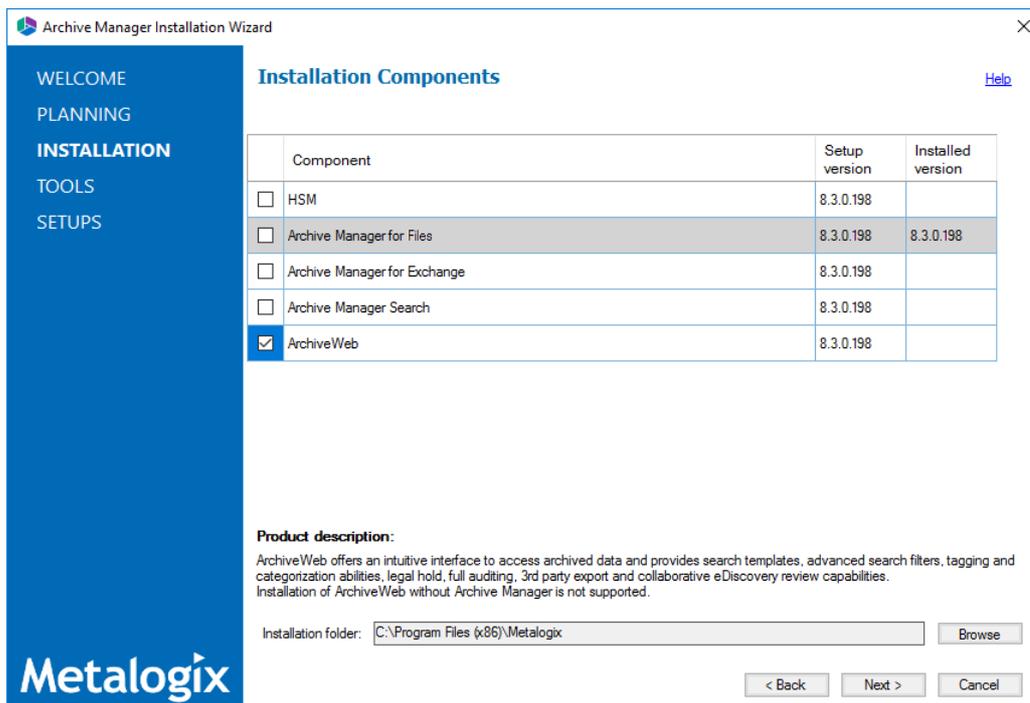
Verify that Archive Manager for Files is installed and then select **ArchiveWeb**. Click Browse to change the installation folder if necessary.

8. Click **Next**. The *Checking Prerequisites* window opens.
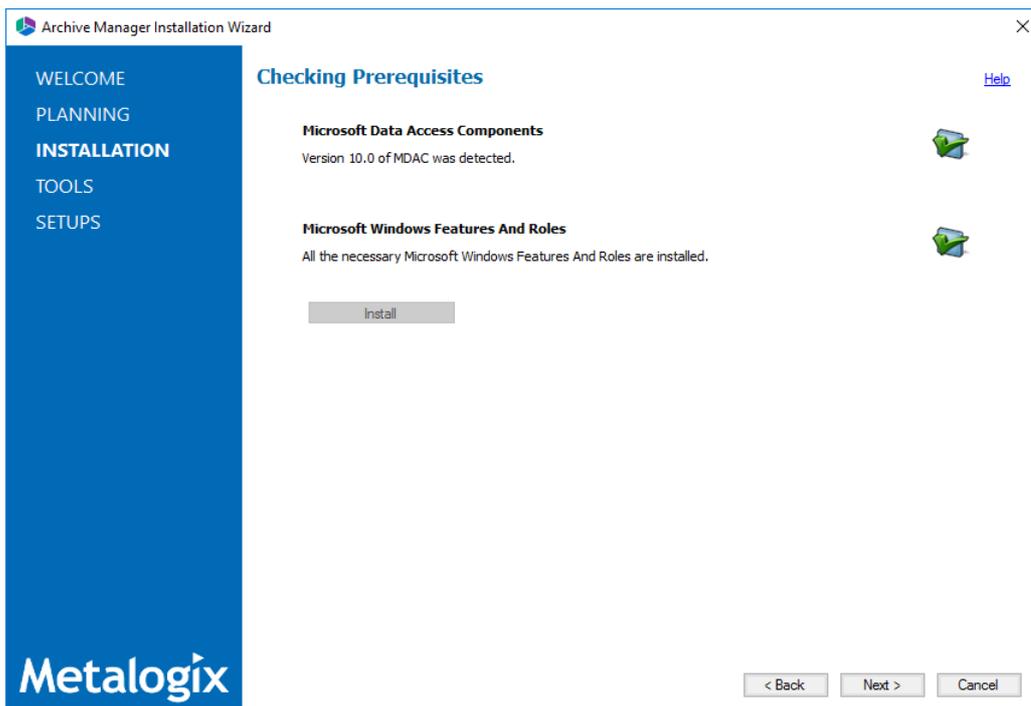
9. Click **Next**. The *Superuser Account* window opens.
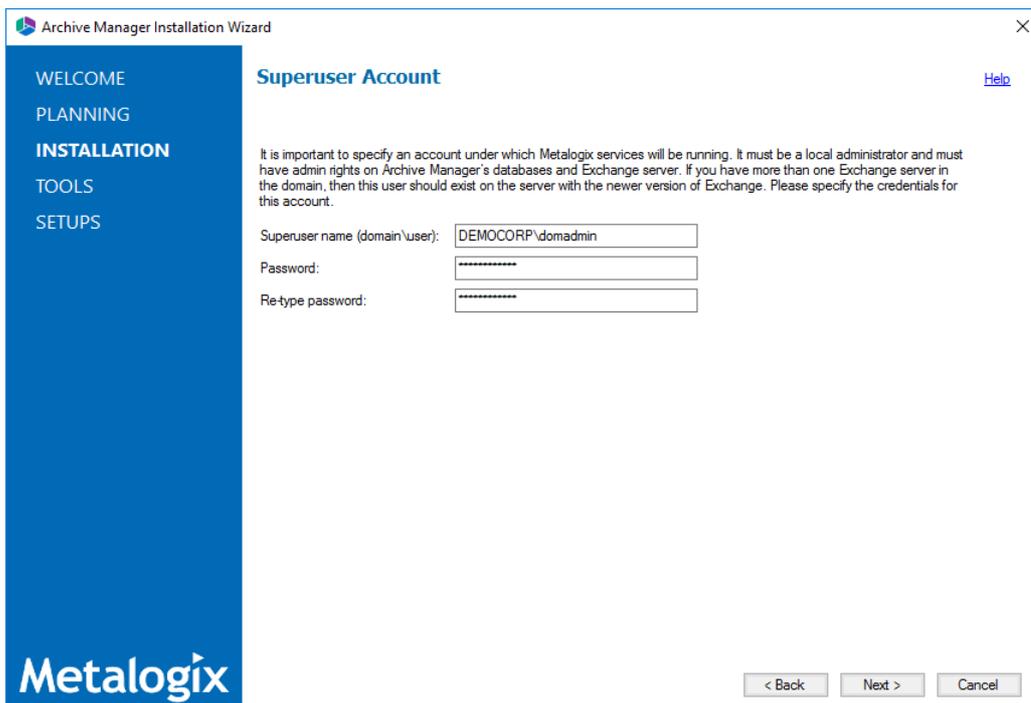
Specify the **Superuser name** and **Password**. Enter the password again in the **Retype password** field.

10. Click **Next**. The *Firewall Settings* window opens.
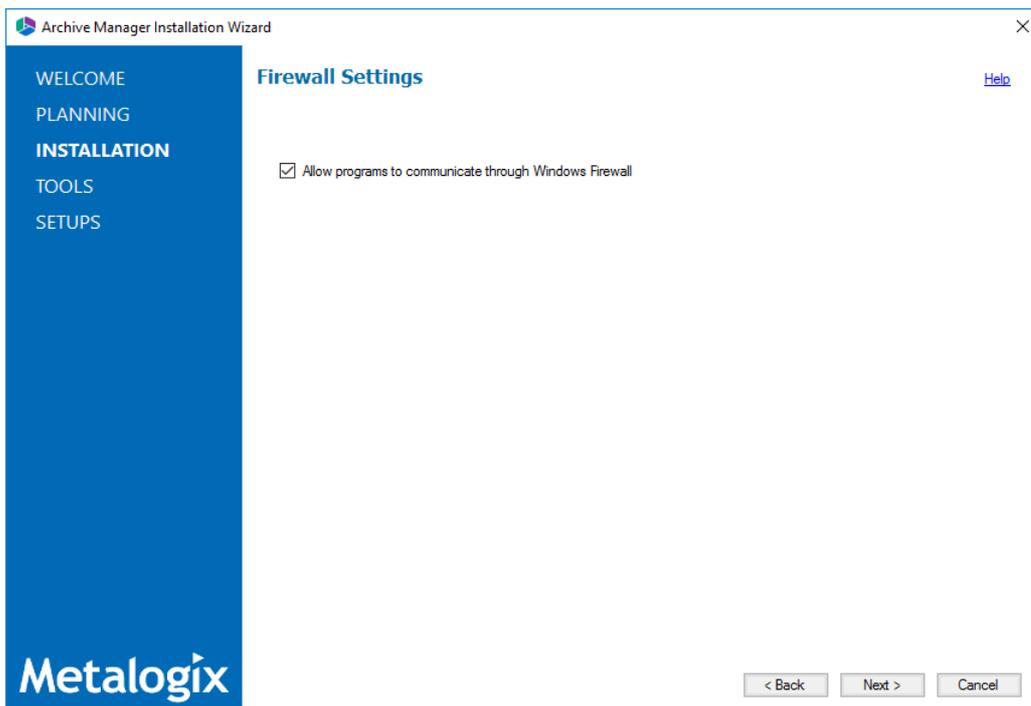
Select the **Allow programs to communicate through Windows Firewall** check box. Metalogix Archive Manager for Exchange features will be then able to communicate through the firewall.

11. Click **Next**. The *Summary Installation* window opens. The installation summary displays settings you have specified in previous steps.
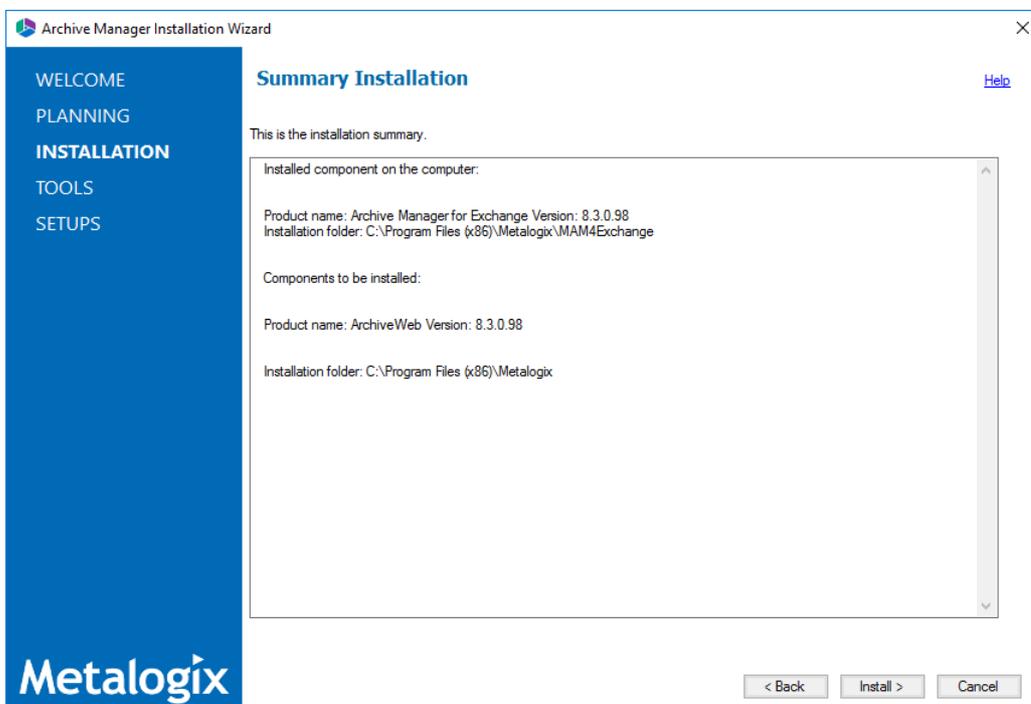
12. Click **Install** to start the installation. When the ArchiveWeb component installation starts, the *ArchiveWeb installation settings - Archive Manager edition selection* window opens.

Select the Archive Manager for Files check box.

13. Click **Next**. The *ArchiveWeb installation settings - Archive Manager component settings* window opens.

If Archive Manager Auditing is installed either on the local or remote server, select **Archive Manager Auditing** and verify the following properties:

Auditing Server Name - name of the server where Archive Manager Auditing is installed

Auditing Server Port - port number of the server.

If Archive Manager Search is installed on the local or remote server, select **Archive Manager Search** and verify the following properties:

Search URL - the URL for the Archive Manager Search webservice.

14. Click **Next**. The *ArchiveWeb site port Information* window opens.
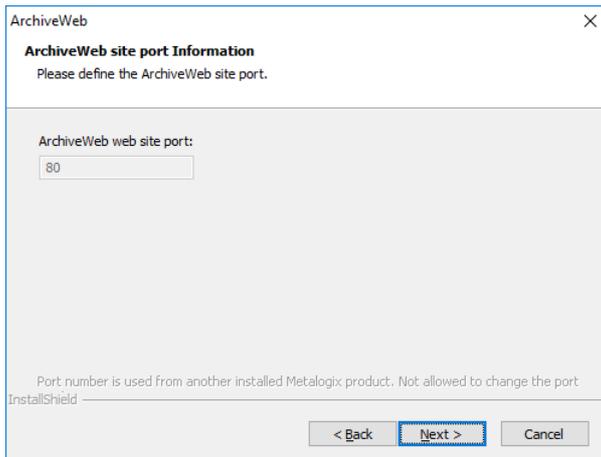
15. Click **Next** to continue the installation. If a feature installation fails or completes with a warning, expand the row to view and address the problem.

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

17. To verify the install, open **Start** > **Metalogix** > **Archive Manager Configuration**. The *Configuration* wizard opens.
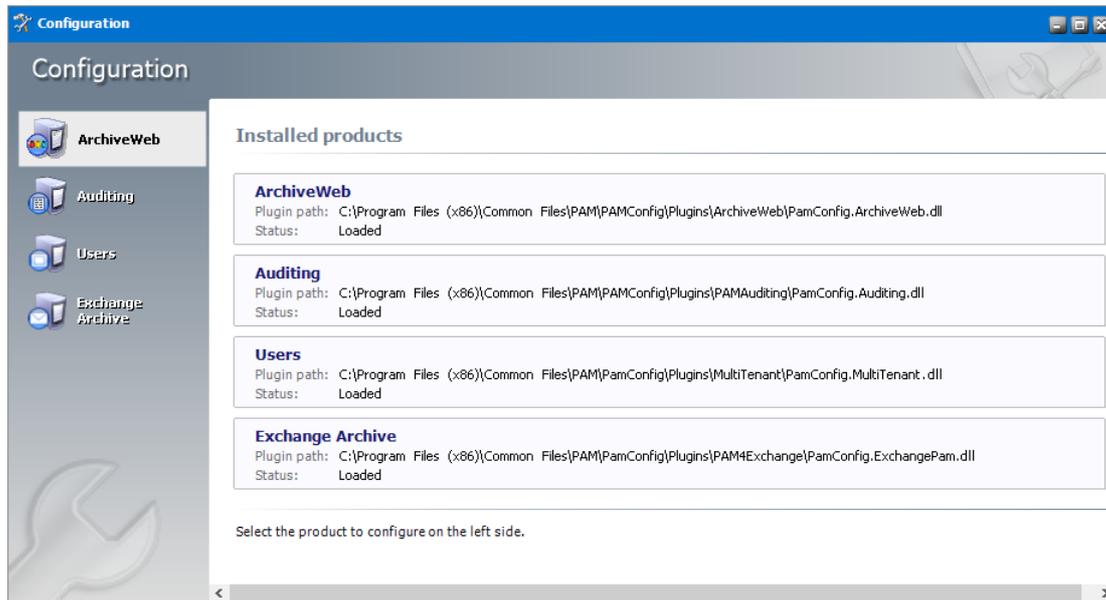
18. Open a supported browser and enter the URL
    `https://<ArchiveWebServerName>/archiveweb`. For example enter
    `https://AMFSERVER.democorp.com/archiveweb` to view archives items.

Steps to install manually with the ArchiveWeb installer

1. Login with the credentials of the **administrator** (eg. **democorp\domadmin**) to the Archive Manager for Files server.

2. Download and unzip the installation package if it is not already available.

3. Open PowerShell in Administrator mode and install the server prerequisites by running the following command:

```
Install-WindowsFeature -Name NET-WCF-HTTP-Activation45, Web-Server, Web-Static-Content, Web-Http-Redirect, Web-Stat-Compression, Web-Dyn-Compression, Web-Windows-Auth, Web-Basic-Auth
```

4. Run the setup file `<installer package folder>\ArchiveWeb\Archive Manager ArchiveWeb setup.exe` to start the ArchiveWeb installer wizard.
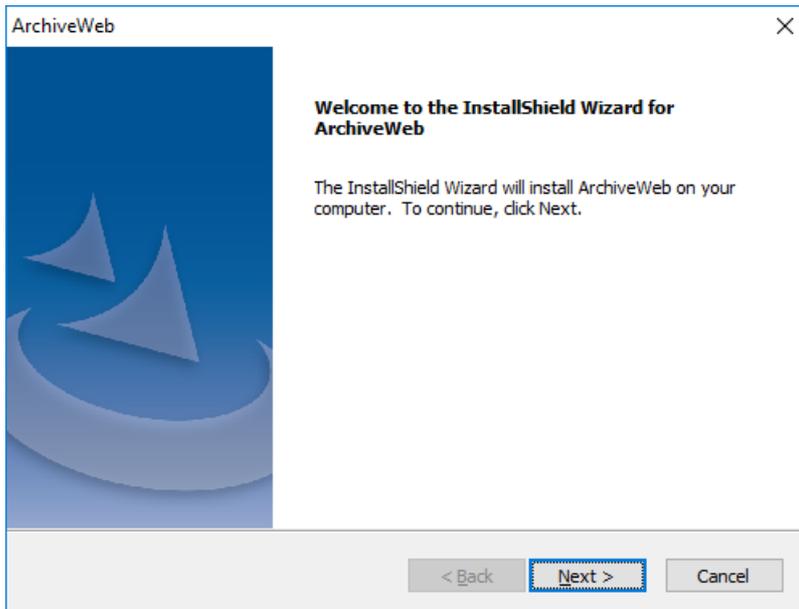
5. Click **Next**. Then *License Agreement* window opens.
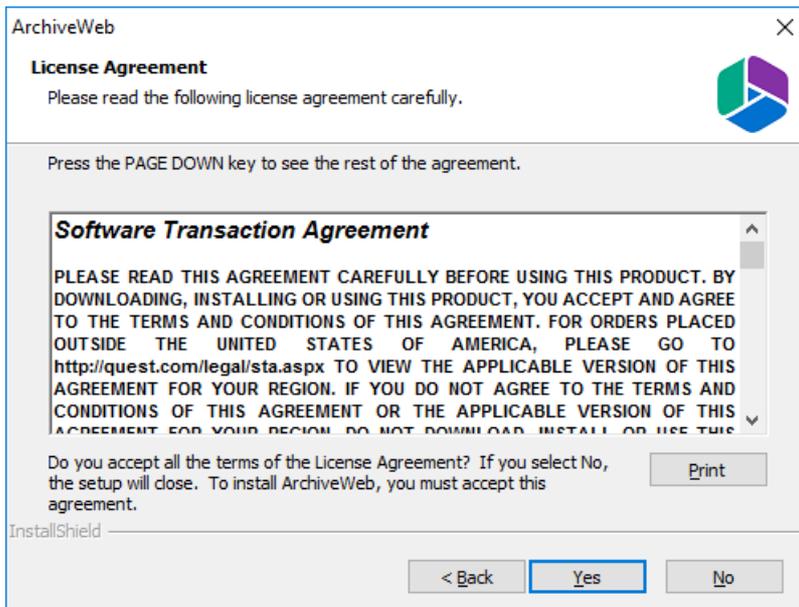
6. Click **Next**. The *Choose Destination Location* window opens.
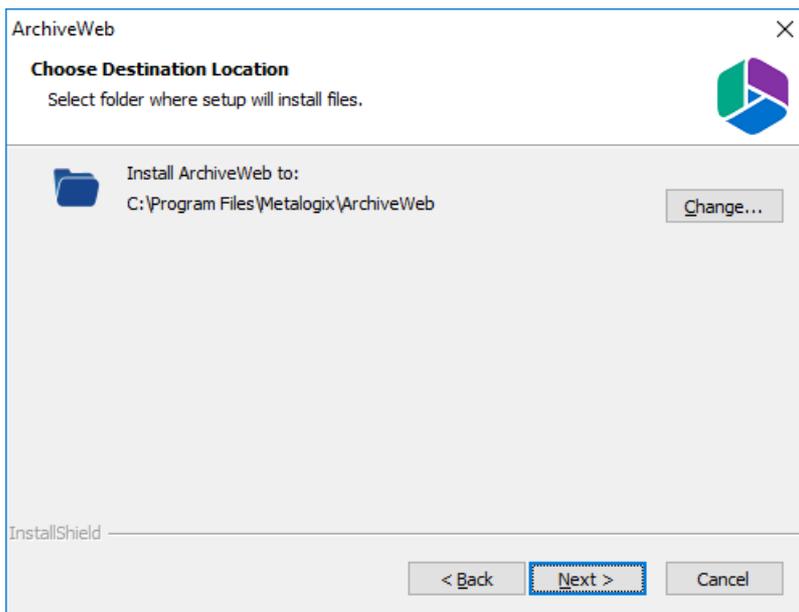
7. Click **Change** to choose another destination or click **Next** to continue. The *ArchiveWeb installation settings* window opens.
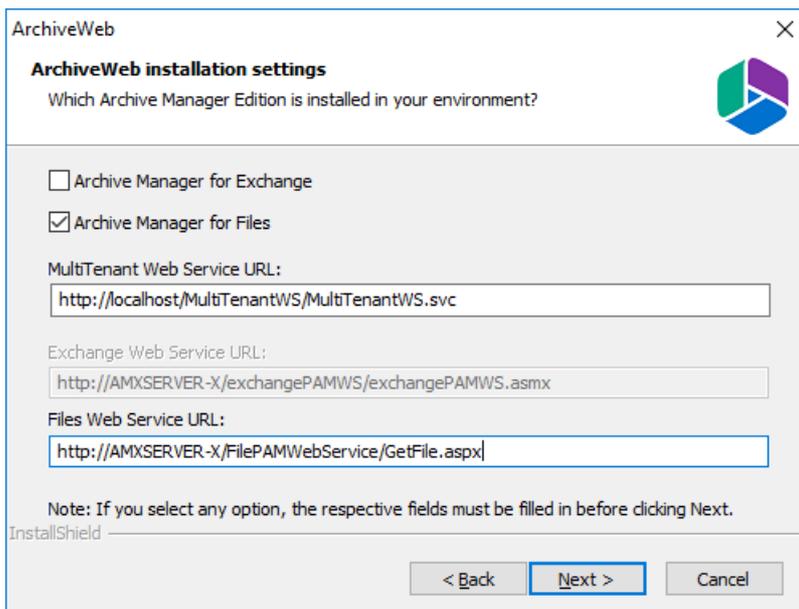
The properties are as described below:

a. **Archive Manager for Exchange** - check this box to install features specific to Archive Manager for Exchange.

b. **Archive Manager for Files** - check this box to install features specific to Archive Manager for Files.

c. **MultiTenant Web Service URL** - location of the tenant web service on the web server. The default location is automatically specified.

d. **Files Web Service URL** - location of the ASP.NET Web service for the Archive Manager for Exchange features in ArchiveWeb. Enabled only if **Archive Manager for Files** check box is checked.

8. Click **Next**. The *Component Integration* window opens.

This window allows you to specify the details of the components installed in your environment that will be integrated with ArchiveWeb.

a. **Archive Manager Auditing** - check this box if Archive Manager Auditing is installed in your environment.

b. **Auditing Server Name** - name of the server where Archive Manager Auditing is installed.

c. **Auditing Server Port** - port number of the Archive Manager Auditing feature. The default port number is 7783.

> **i** **NOTE:** To find this information open the *Archive Manager Configuration* tool on your auditing server. Then open the *Connection* tab in the *Auditing* section.

d. **Archive Manager Search** - check this box if Archive Manager Search is installed in your environment.

e. **Search URL** - the search URL used by the search feature in the format tcp://<search-server>:<search-port>/PamSearch.

> **i** **NOTE:** To find this information open the *Archive Manager Configuration* tool on your auditing server. Then open the *Connection* tab in the *Auditing* section.

9. Click **Next**. The *ArchiveWeb site port* window opens.

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

Enter the account credentials as described below:

a. **User name** - user name of the enterprise administrator in the format `domain\username`.

b. **Password** - password for the enterprise administrator.

c. **Confirm password** - re-enter the password for the enterprise administrator.

11. Click **Next**. The *Ready to Install the Program* window opens.
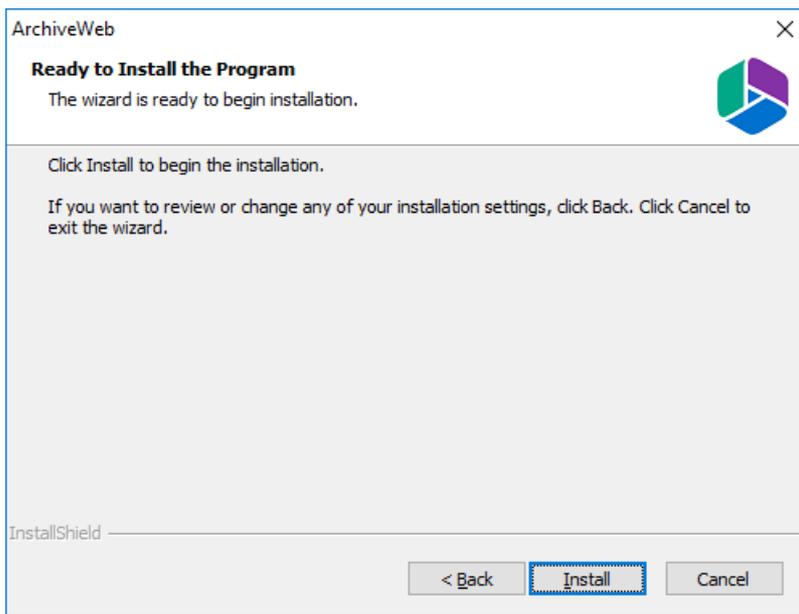
12. Click **Back** to review or revise the settings, or click **Install** to start the installation.
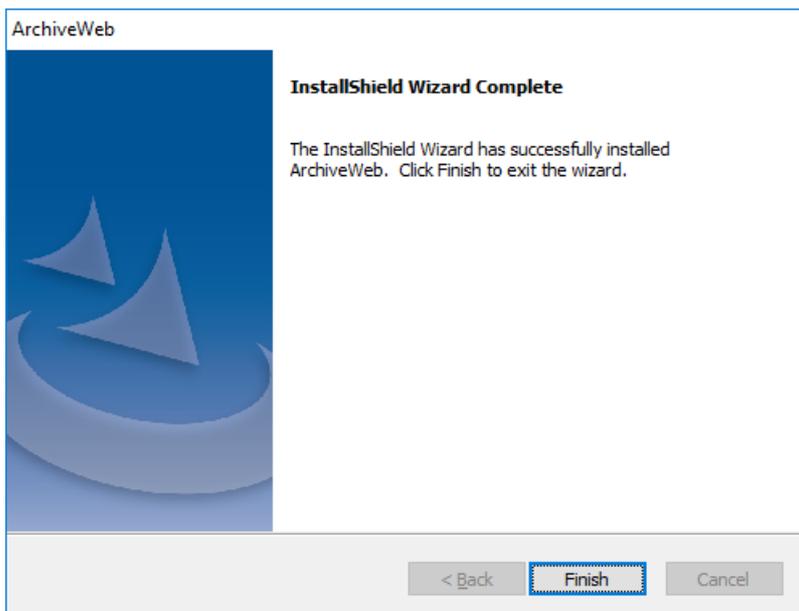
13. Click **Finish** to complete the setup and close the installer wizard. The *ArchiveWeb* section in the *Archive Manager Configuration* tool opens. For more information see Configuration.

Configuration

In this chapter:

- ArchiveWeb Settings

- Multi-factor Authentication

ArchiveWeb Settings

ArchiveWeb is configured and ready for use right after installation. No user action is required. However, should the need arise, default configuration can be adjusted in Configuration tool.

The Configuration tool is available on the ArchiveWeb server under *<installdir>/Program Files (x86)/Common Files/PAM/PAMConfig/PamConfig.exe*. Its **ArchiveWeb** tab list available configuration options. (For more information on the **Multi-factor authentication** tab see the section *Multi-factor authentication (MFA)*.)
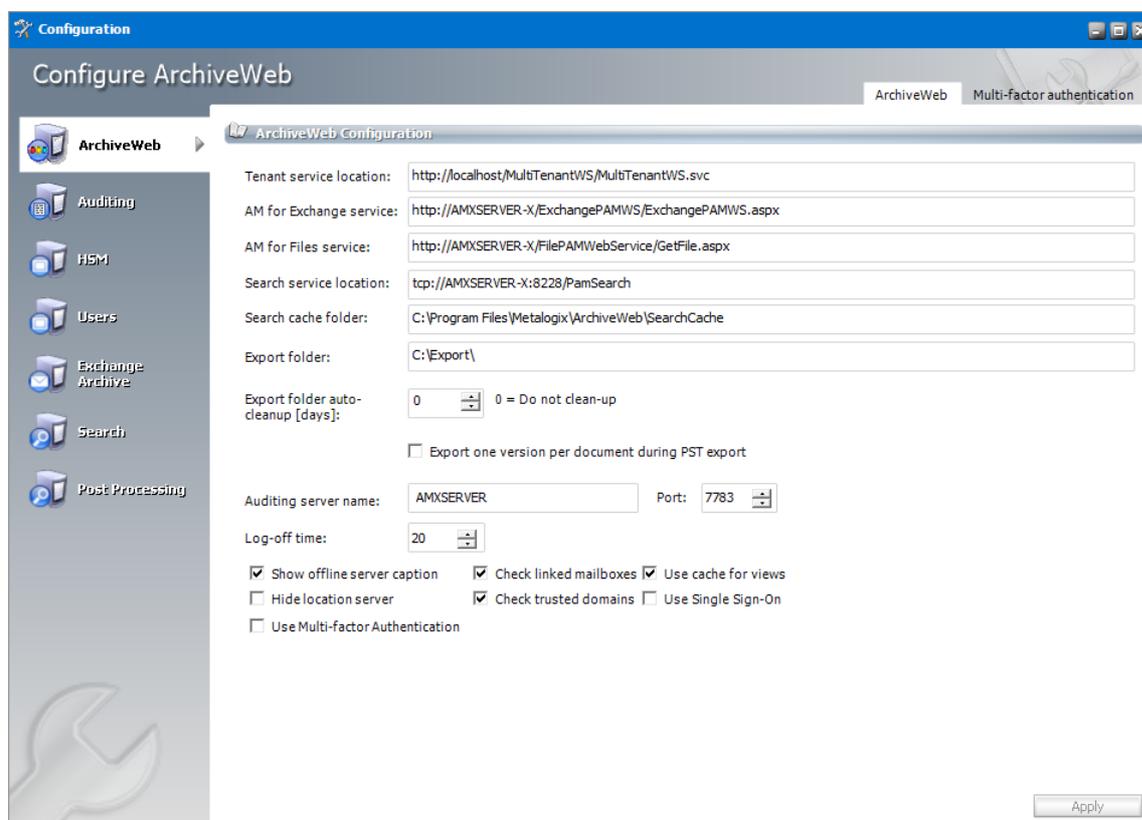
Tenant service location - URL for MultiTenantWS web service

AM for Exchange service - URL for ExchangePAMWS web service

AM for Files service - URL for FilePAMWebService web service

Search service location - URL for PamSearch web service

Search cache folder - user's temporary storage folder to store e.g. messages downloaded from Exchange server for preview functionality

Export folder - folder where exported files (PST export, ZIP export) are stored (download link points to this folder)

Export folder auto-cleanup [days] - files older than the specified number of days will be deleted from the **Export folder**.

> **Export one version per document during PST export** - indicates whether to export one version per document during PST export

Auditing server name & port - machine where auditing component is installed

Log-off time - time in minutes to log off when inactive

Show offline server caption - check to show [OFFLINE] suffix for decommissioned servers in servers' list (Archive Manager for Files)

Hide location server - unchecked by default; indicating whether to hide Location Server Name from user's mailbox displayed in Mailboxes tree-view; if not checked, Location Server Name will be displayed as a suffix to user's email, e.g. `administrator@[VMMVC5]`

Check linked mailboxes - checking whether currently logging user has a linked mailbox associated. When unchecked, the entire login process can be accelerated because no additional Active Directory search is performed

Check trusted domains - checking trusted domains and reading information from trusted relationships. When unchecked the entire login process can be accelerated because no additional reads (from trusted domains) are performed

Use cache for views - when checked, all grid source data are cached after first load. Then all operation on grid that do not change the data will be performed quicker

Use Single Sign-On - when this option is checked, it will set Single Sign-On feature for ArchiveWeb login.

Multi-factor Authentication

ArchiveWeb supports multi-factor authentication (MFA) for O365 user accounts. Setting up MFA is a two-step process:

1. Create a new application in the Azure portal.

2. Configure ArchiveWeb with the Archive Manager configuration tool.

Create a new application in the Azure portal

ArchiveWeb requires a specific Azure site to be created that is used to return an authentication token back to the ArchiveWeb after a user is authenticated via Microsoft portal.

1. Login to your Azure Portal using your administrator credentials (https://portal.azure.com). If your account gives you access to more than one tenant, select your account in the top right corner, and set your portal session to the Azure AD tenant that you want.

2. In the left-hand navigation pane, select the **Azure Active Directory** service, and then select **App registrations** > **New registration**. The *App registrations* page appears*.*

3. Click **New registration**. The *Register an Application* page appears.

4. Provide the information on this page as described below:

   a. **Name** - Enter a meaningful application name that will be displayed to users. For example, **Archive Manager ArchiveWeb**.

   b. **Supported account types** - Select the account type you would like your application to support that best meets your company policy.

c. **Redirect URI** - from the *application type* drop down select **Web**. In the URI field enter the ArchiveWeb URI where the user will be redirected after multi-factor authentication (eg. `https://<fullservername>/ArchiveWeb/Login/Login/Login`)

> **i** | **NOTE:** The HTTPS protocol is required for MFA to work with O365. To ensure the HTTPS can be used, follow the steps below;
>
> 1. On the ArchiveWeb server, open the IIS Management Console.
>
> 2. Expand the server node and then expand the Sites node.
>
> 3. Select **Default Web Site** and right-click to open the context menu. Then select **Edit Bindings**. The *Site Bindings* window opens.
>
> 4. Click **Add**. The *Add Site Bindings* window opens.
>
> 5. Select **https** from the **Type** drop down and fill in the other details as required.
>
> 6. Click **OK** to save the https site binding.
>
> 7. Restart the IIS service from the server node and then close the IIS Management console.

5. Click **Register**. Azure AD assigns a unique application (client) ID to your app, and the application's *Overview* page opens.
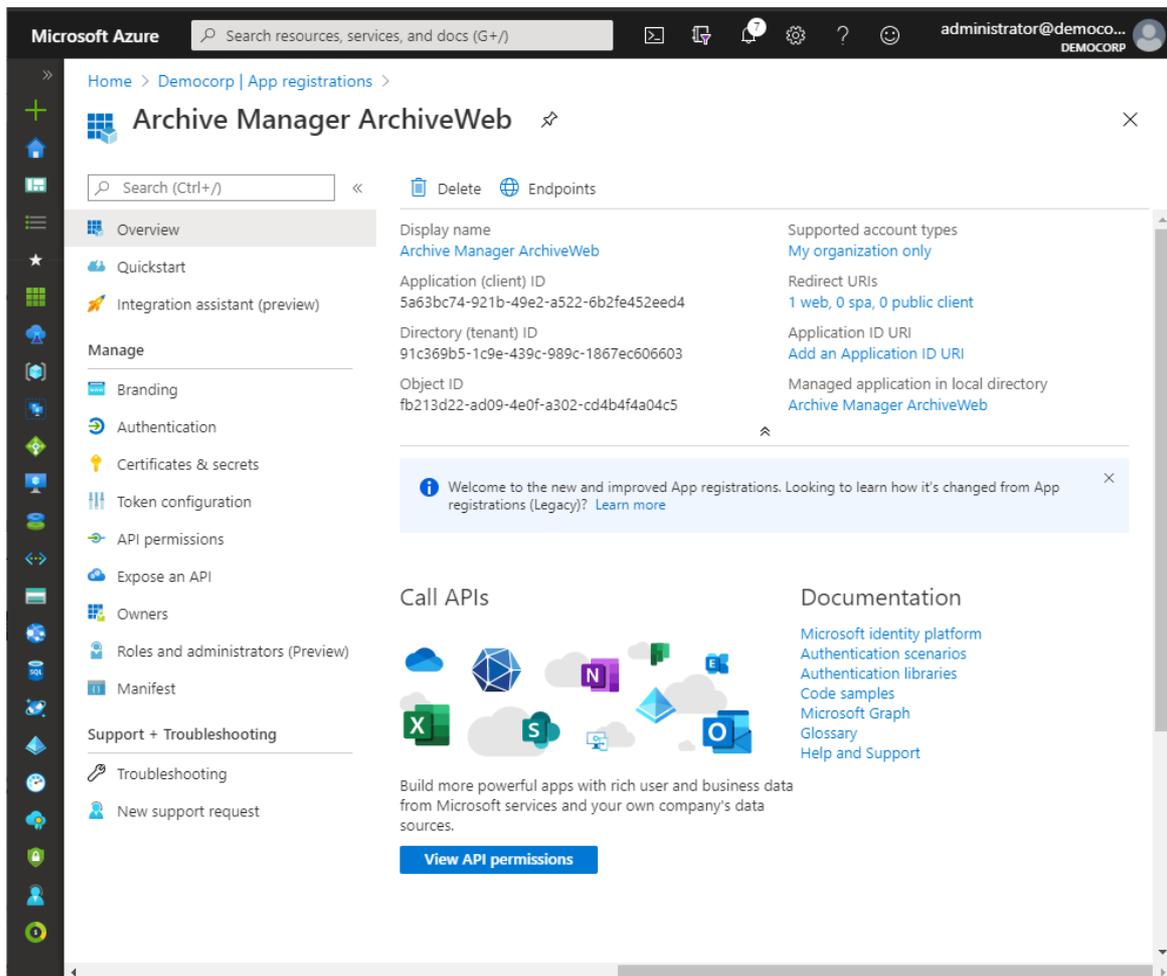
6. From the navigation menu, click **Branding**. Enter the URLs that your organization may use for the different branding artifacts.

7. From the navigation menu, click **Authentication** and verify that the Redirect URI parameters are as expected.
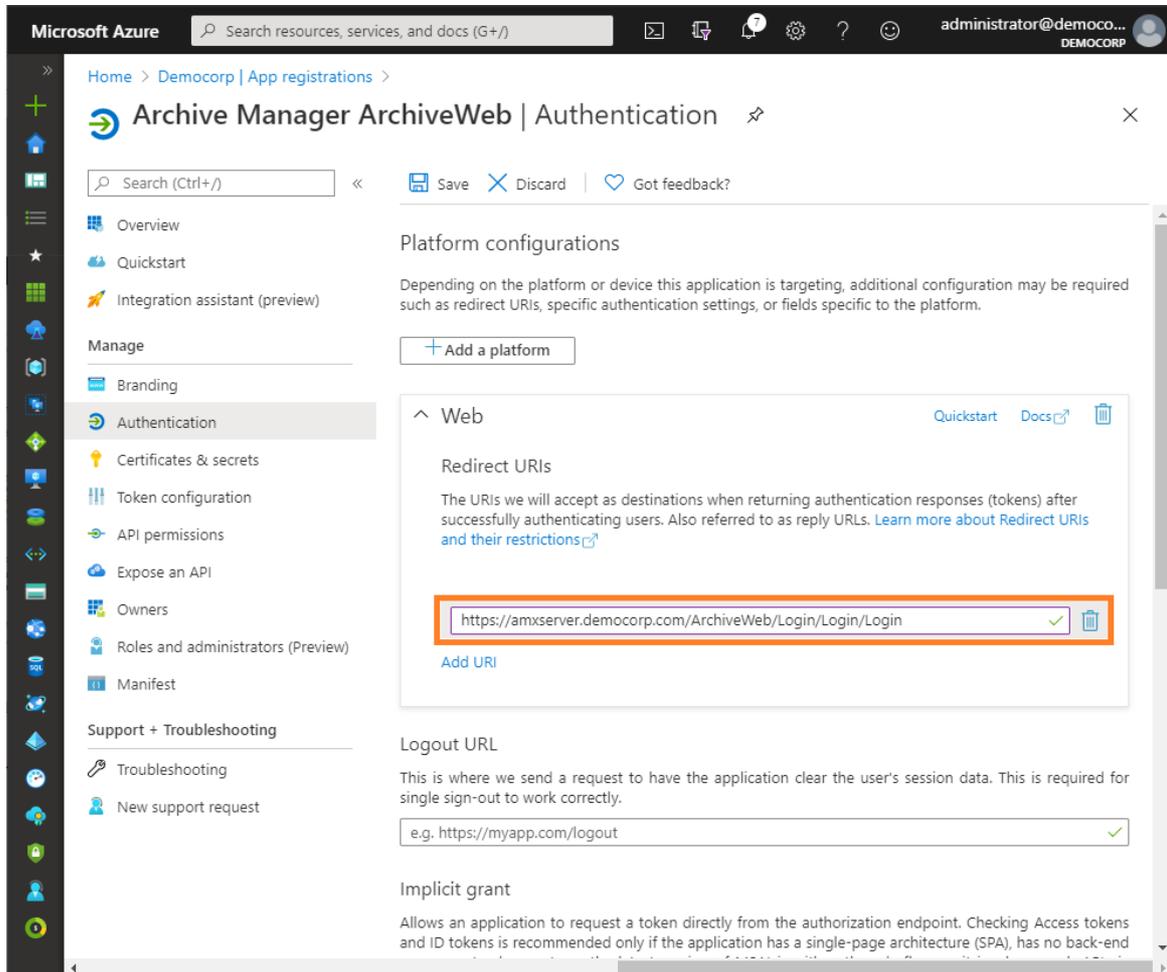
8. From the navigation menu, click **Certificates & Secrets**.

9. In the *Client secrets* section click **New client secret**. the Add a client secret page opens.

10. Enter values as described below:

a. **Description** - enter a meaningful description. For example, ArchiveWeb Client Secret.

b. **Expires** - set the expiry term that best meets your company policy.

11. Click **Add**. the client secret is displayed on the Certificates & Secrets page.

> **i** | **IMPORTANT:** Copy and save the client secret in a safe place. It will not be available when you navigate away from this Azure blade.

12. From the navigation menu, click **API Permissions**. and then click **Add a permission**. The *Request API permissions* page appears.

13. From the **Microsoft APIs** category, scroll down to the *Supported legacy APIs* section and select **Azure Active Directory Graph**.

14. From the *Request API permissions* page for Azure Active Directory Graph that appears, select **Delegated permissions**.
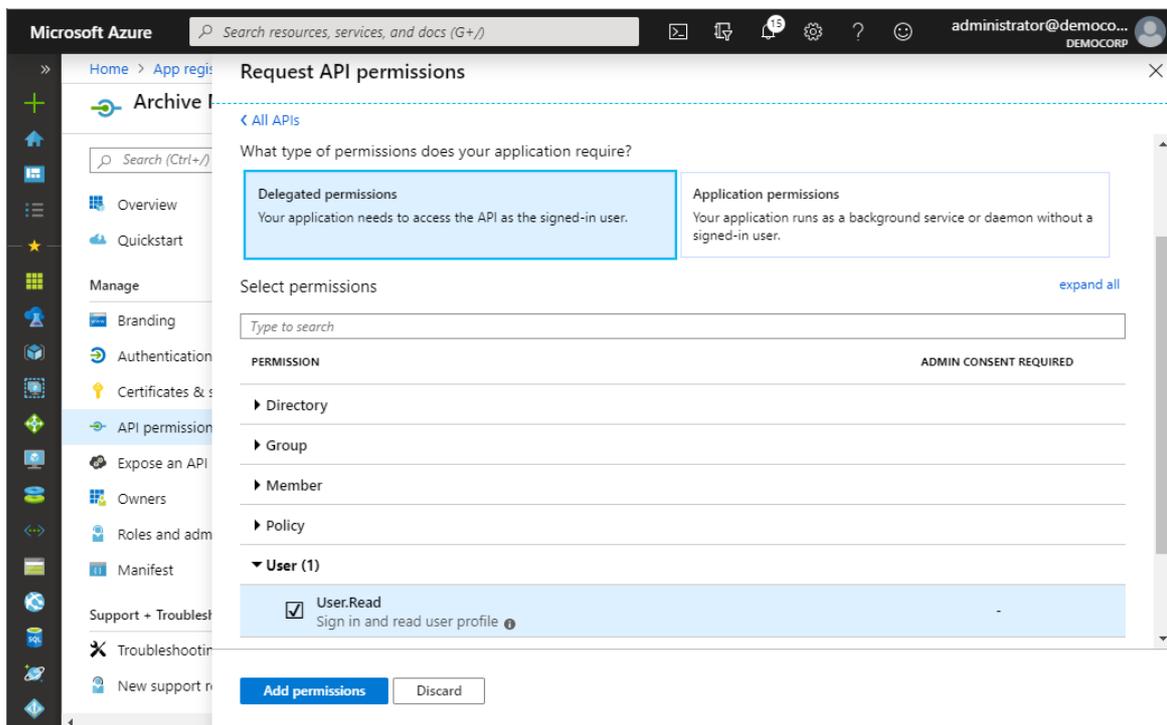
15. Click **Add permission**.

16. From the navigation menu, click **Expose an API**.

17. In the *Scopes defined* section, click **Add a scope**. The *Add a scope* page opens.

18. Microsoft Azure generates an Application ID URI automatically. It is a globally unique URI used to identify this web API. It is the prefix for scopes and in access tokens,and is also referred to as an identifier URI. You can keep this value or specify a unique value in the same format.

> **i** | **IMPORTANT:** Copy and save this value in a safe place.

19. Click **Save and continue**. The *Add a scope page* displays more options.

20. Click **Add scope** to complete the registration.

Configure ArchiveWeb with the Archive Manager configuration tool

1. Open the Archive Manager Configuration Tool from *C:\Program Files (x86)\Common Files\PAM\PAMConfig\PamConfig.exe*

2. From the sidebar, click **ArchiveWeb**.

3. Click the **ArchiveWeb** tab. The *ArchiveWeb Configuration* page appears.
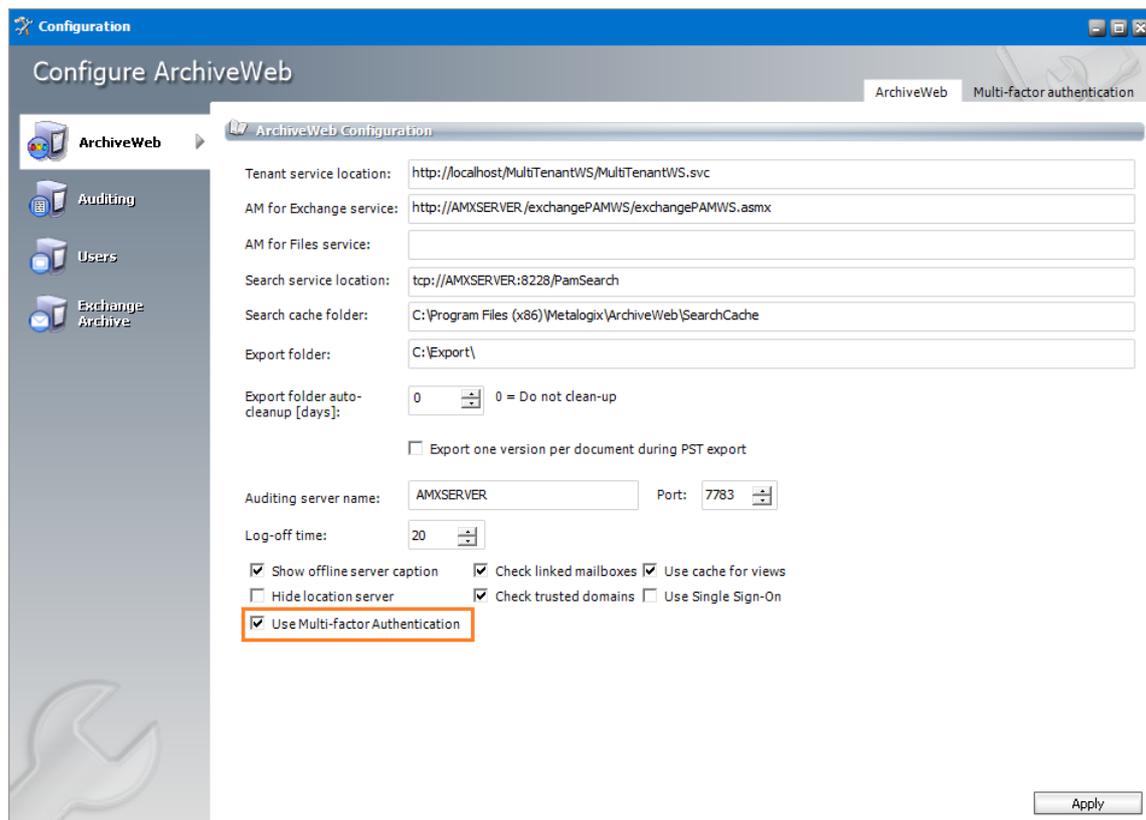
4. Select the **Use Multi-factor Authentication** check box to enable the fields in the *Multi-factor authentication Configuration* window.

5. Click the **Multi-factor authentication** tab. The *Multi-factor authentication Configuration* window appears.
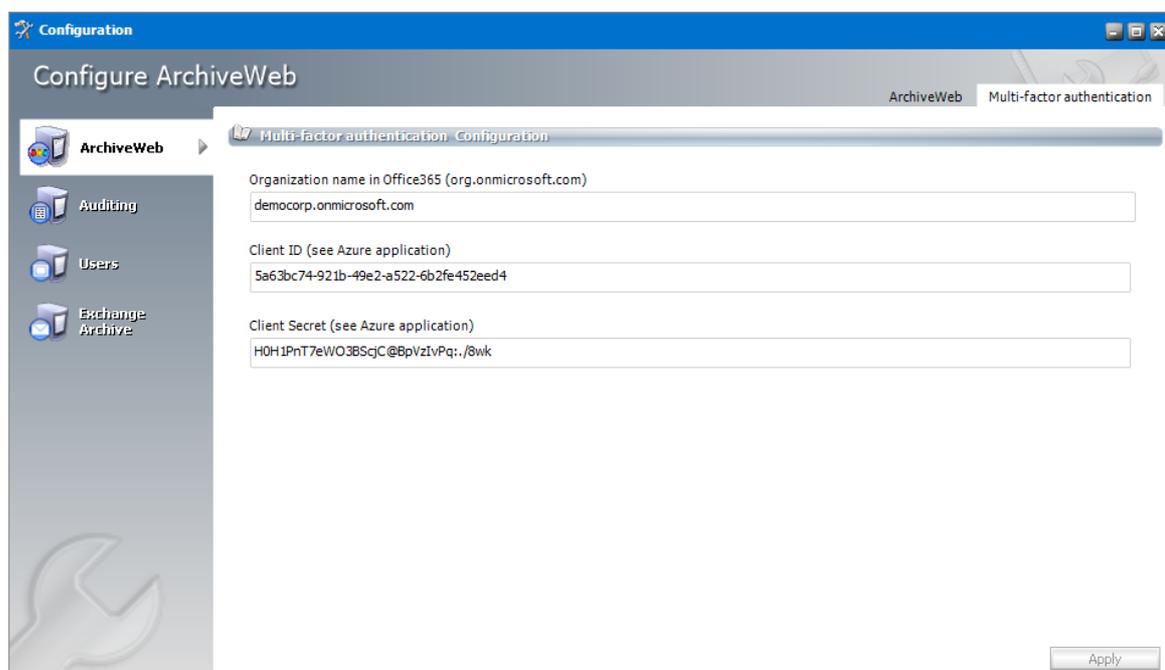
6. Enter the field values as described below:

a. **Organization Name in Office365** - enter the name of your O365 organization URL. For example, *democorp.onmicrosoft.com*

b. **Client ID** - enter the Client Id that you saved from the Azure application registration steps.

c. **Client Secret** - enter the Client Secret that you saved from the Azure application registration steps.

7. Click **Apply**.

i | **IMPORTANT:**

When at least one user in an organization has MFA set, the Organization, Client ID and Client Secret should be set in *Multi-factor authentication* tab as a readiness exercise.

If only a few users in your organization have MFA enabled, the **Use Multi-factor Authentication** check box should stay unchecked. The settings in the *Multi-factor authentication* tab will persist when the **Use Multi-factor Authentication** check box is unchecked. The users who have MFA enabled will be prompted to enter the credentials (user email and password) and then they will be redirected to the Microsoft site where the user has to authenticate again. After a successful authentication by Microsoft, the user will be redirected back to ArchiveWeb.

When all users accounts in an organization have MFA enabled, the **Use Multi-factor Authentication** check box can be selected. This will force ArchiveWeb to use multi-factor authentication for all users that log in to ArchiveWeb. Users will be prompted to enter only the login email address and they will be redirected to the Microsoft login form to finish the login process.

ArchiveWeb Interface and conventions

After browsing the ArchiveWeb URL (http://<ArchiveWebServerName>/archiveweb), the Login window gets displayed. Users are asked to enter their name (or "domain name\user name" or "email address") and password. Email address should be:

- Office365 email address

- Active Directory Domain email address in format <name>@domain.com

Please note: johnSmith@ateam.com is equivalent to ateam\johnSmith.

Default language depends on the Windows local setting of the Archive Manager server.

NOTE: When Integrated Windows authentication is turned on, the login page is skipped and the logged-in user's credentials are used. This is set in C:\Program Files\ Common Files\ PAM \ Web \ ArchiveWeb \ Web.config where <authentication mode = "windows">.
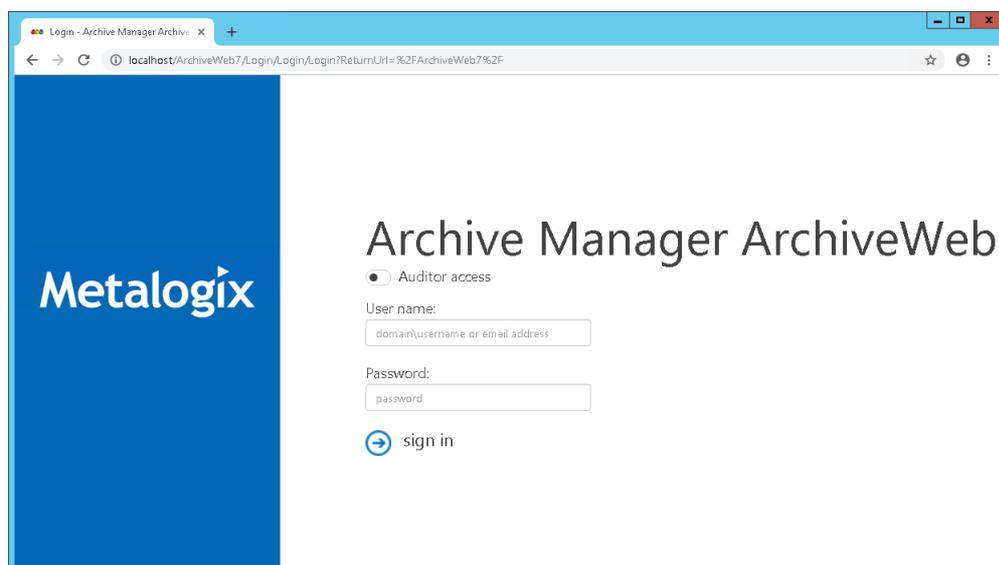
After logging in correctly, the ArchiveWeb application opens. The top-page main bar contains search box (fulltext searching in e-mail body, attachments, file content) and tabs – archive, search, report – representing the activated features of Archive Manager. Once you click one, the grey sub-bar under the main pane displays additional options.

Further, in the right upper corner you may see the logged on user. Click it to unfold the drop-down menu offering the following options:

- Manage settings option provides access to further settings based on user permissions:

- Log out option is to be used when logging off

After clicking Manage Settings, the following menu options appear on the displayed menu bar:

The Roles option is available if the user has necessary permissions. Under this option you can manage user/ArchiveWeb roles assignment based on roles (see the "Roles" section).

The Permissions option is available if the user has necessary permissions. Under this option you can manage user/ArchiveWeb roles assignment based on users (see the "Permissions" section).

The Profile option enables you to adjust ArchiveWeb layout to your liking (see the "Profile Settings" section).

The Shared Mailboxes option is available only when Archive Manager for Exchange is installed and configured for ArchiveWeb.

When shared mailboxes are set for a currently logged user in Archive Manager for Exchange -> Tools -> Mailbox Rights Manager the grid will be populated and a user can select which mailbox(es) he/she likes to be listed in Archive's mailboxes tree and in searchable mailboxes.

Under the Tags option one can create tags for archive or auditing items (see the "Tags" section).

The File Management option is available if the user has necessary permissions. Under this option you can manage file servers and scheduled jobs (see the "File Management" section).
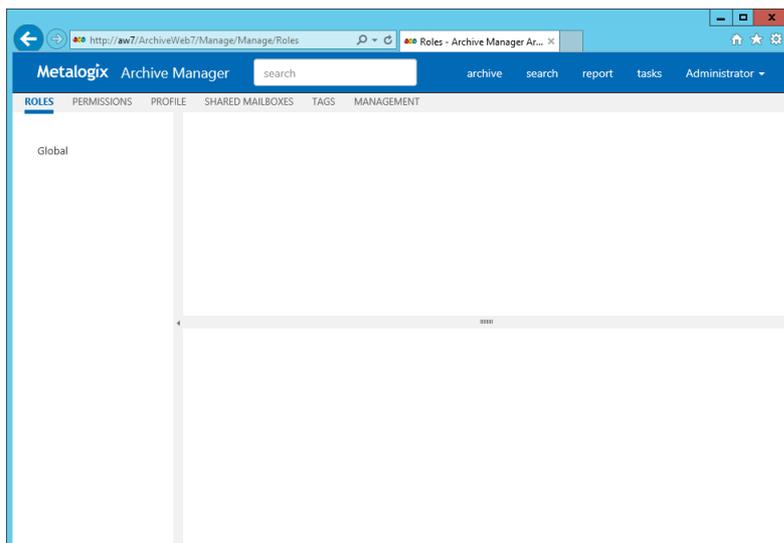
The Search text box in the upper part of the window was designed for fast and easy searching in archives - Archive Manager for Exchange archive as well as Archive Manager for Files archive. Enter the desired expression and click Enter.

NOTE: Email attachments, email bodies and file contents are searched through only if fulltext search is installed.

List view conventions

With advanced list view functionality provided with every ArchiveWeb list view you can easily search even in huge lists of items and adjust the list to your specific needs. List view functions are the same as for all ArchiveWeb lists. In the main pane you can switch between these types of items by clicking on the respective filter:

- archived - all folder archived items except items marked for deletion
- shortcutted - archive items with shortcut in mailbox
- lost - archived items with no reference in mailbox/file system
- tagged - archived items with tag(s)
- locked - locked archived items
- for deletion - archived items that are marked for deletion, i.e. they will be deleted when their retention period expires (and delete job runs)

Preview (if available) of any item you click on appears below the list view. To open **More actions** menu for the item click the **More actions** link (MENU) on the right bottom below the list.
Pop-up preview feature is also available for Exchange, Files, Auditing and Search results items. When a user double-clicks anywhere in the item's line, the item opens in pop/up window full screen mode with all functionality as in normal view, such as multi/action menu (MENU), and comments area.

Check boxes are designed for multi-select. If MORE THAN ONE item is selected, **More actions** menu appears automatically below the list.
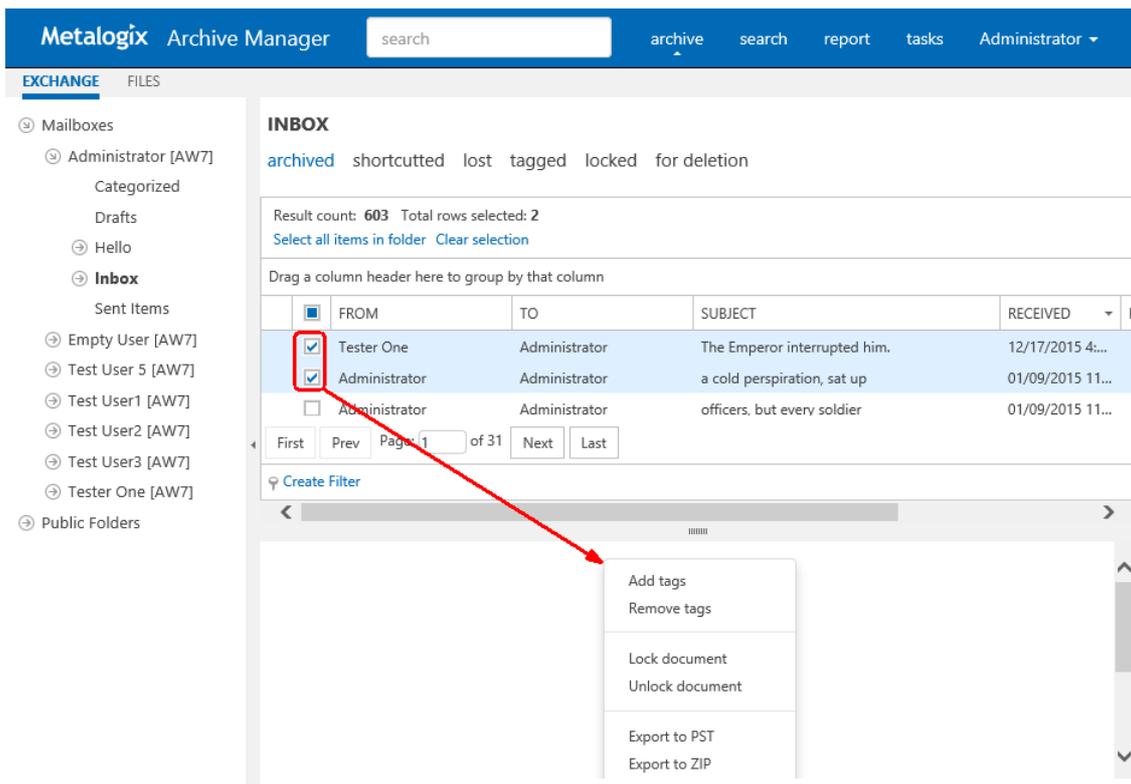
Batch selection/unselection of items is done by clicking the **Select all rows (Select all items in folder)/Clear selection** action links just above the list. When **Select all rows/Select all items in folder** action links are selected, operations are performed over all items in the given folder. (See more under "Simple Grid" section.)

It is also possible to change the column order by simple drag-and-drop action. Individual columns can be shown or hidden - these settings are managed in user profile after clicking **<UserName>** / **Manage Settings / Profile** in *Columns* section.

Further, lists can be:

➢ **sorted**   Change the column sorting order by selecting the given column header and clicking its down/up arrow on the right (in case the arrow is not visible adjust the width of the column by dragging the line)

➢ **grouped**   Group table data by any column. To do so, drag the column header to the bar right above the table. Generated groups can be expanded by clicking the arrows next to them. As usual, the sorting order can be changed by clicking the little arrow in the dragged column header

NOTE: In case of SIMPLE grid (see the Profile settings section) Grouping apply just for items on the current page.

➢ **filtered**   Create filters as described in detail in "Filter Builder" section below.

Simple Grid

Simple Grid is specific type of grid available for Archive\Exchange, Archive\Files and Report\Auditing list view. It allows customization of the list view and offers some specific features for handling the list items as described further. *Simple Grid* option can be set under **<Logged-on User> / Manage settings / Profile / Settings**. When you select **Use grid view** / **Simple** option for the list view (e.g. for Exchange/Archive list view), the given list view will have page navigation controls and will allow user to set number of items to be displayed per page (Items per page) as shown in the screenshot below.
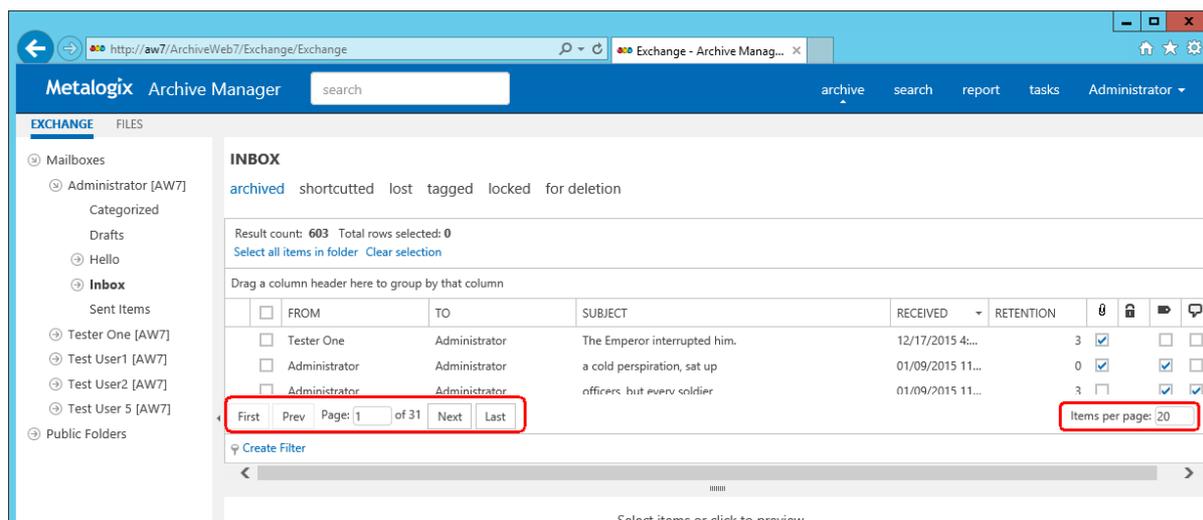
Asynchronous folder operations over folder are available for Simple Grid. Click the **Select all items in folder** link to perform operation over all items in a specified folder.
NOTE: The link does not appear on filter tabs such as "shortcutted", "lost", "tagged", "locked" and "for deletion".
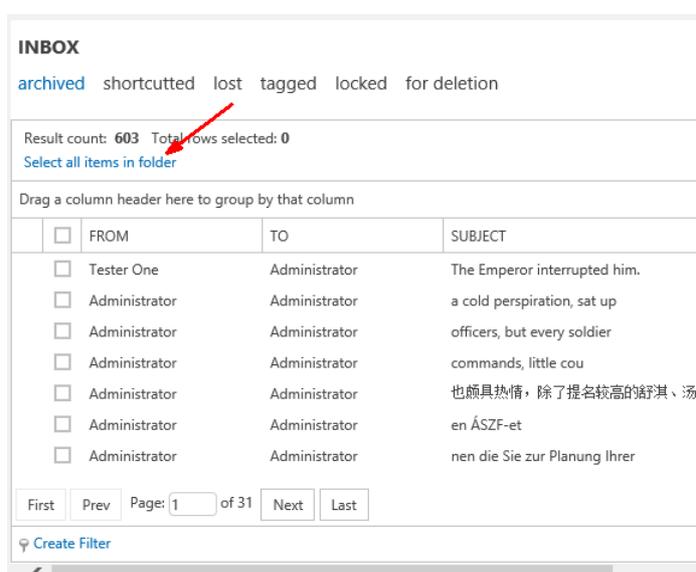
When a user clicks on the **Select all items in folder** link, the **Total rows selected** label will show the same number as **Result count** label shows. No item will be selected (see picture below).
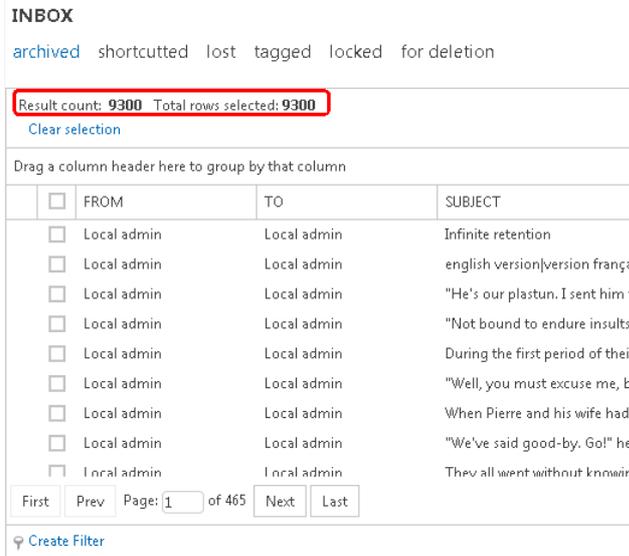
Additionally, the preview pane displays folder operations menu (according to user permissions) except "*Restore*" functions. ("*Restore*" operations are not allowed as folder operations.)

Exchange	Files	Audit
FOLDER OPERATIONS ☐ Include subfolders Add tags Remove tags Lock document Unlock document Export to PST Export to ZIP Mark for deletion Extend retention time Create retention change request	**FOLDER OPERATIONS** ☐ Include subfolders Add tags Remove tags Lock document Unlock document Export to ZIP Mark for deletion Extend retention time Create retention change request	**FOLDER OPERATIONS** Add tags Remove tags Export to XLS

By selecting any operation from "FOLDER OPERATIONS" action menu, a confirmation dialog appears:
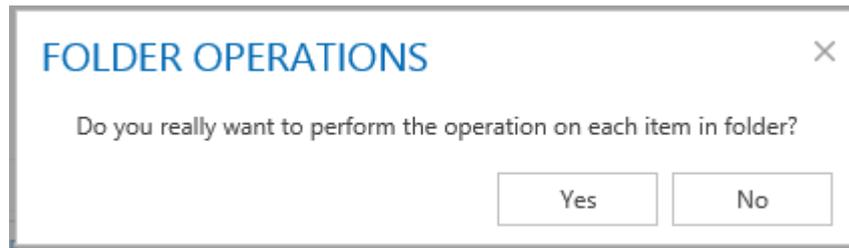
Only when a user confirms this dialog the desired operation will be added to the *Task list* queue. The *Task list* is regularly checked for new tasks. When task arrives and no other is running, the given task will be run. Otherwise the task will wait in a queue.
NOTE: Only one task can be performed at a time.

Filter Builder

It may be sometimes difficult to quickly find the desired item among hundreds of other items in the archive. ArchiveWeb can facilitate this task for users via clever filtering functionality.

Filters can be created for any ArchiveWeb list via Filter Builder. Filter Builder link is present on the bottom left below any list view.
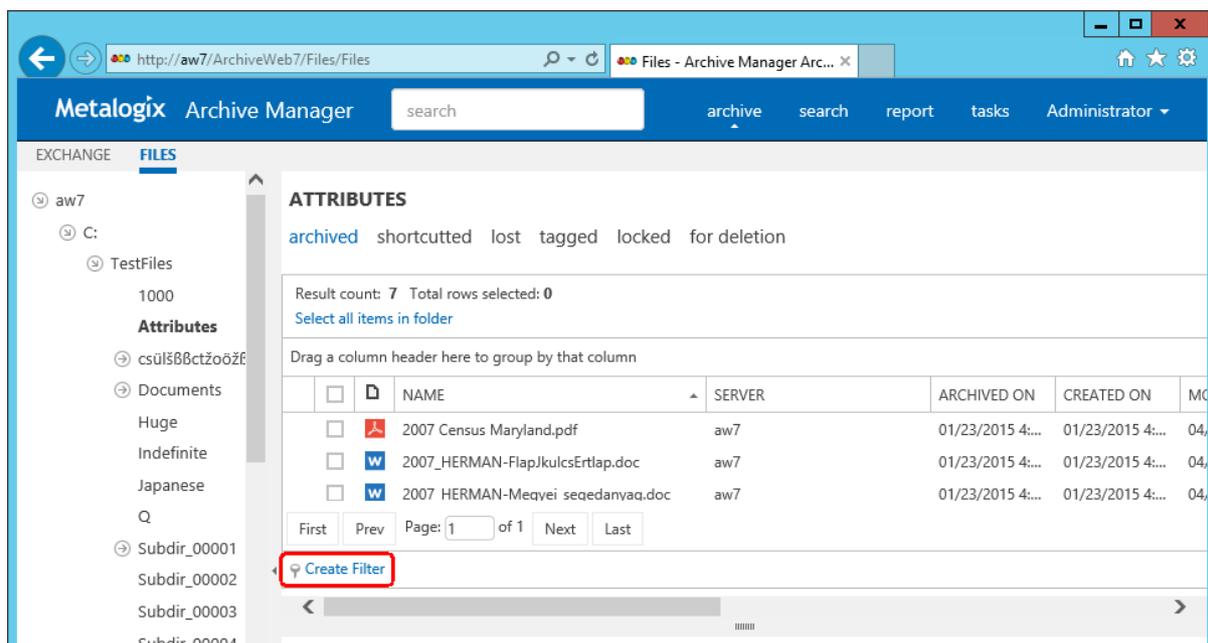
In the pop-up Filter Builder dialog configure your desired filter. First click the red "And". The **red color** expressions denote the filter type you are defining. Available filter types:
- AND
- OR
- NOT AND
- NOT OR
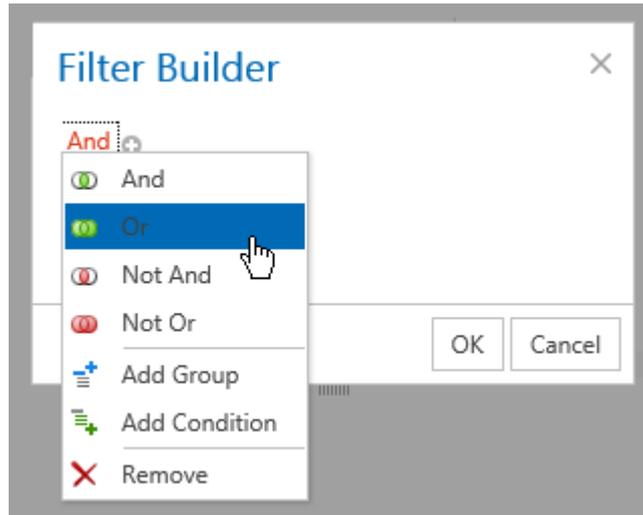
When the filter type is selected, click the plus sign (⊕) to define the filter condition itself. The default condition appears but it has to be modified to constitute an actual filter. To define the desired filter condition, click the color-coded condition constituents one by one. For each constituent you will see a drop-down containing possible values – see the example below.

Creating filter - example

Default:

FROM	**Begins with**	**<enter a value>**
⇩	⇩	⇩
click to select from available conditions, e.g. RECEIVED	click to select the second part of your condition, e.g. is less than	click to enter the desired value for your condition, e.g. 05/11/2015

To cancel filtering, uncheck the filter checkbox next to the displayed filter on the bottom left under the list view.

Manage Settings

As default, only the super-user specified in Archive Manager for Exchange or Archive Manager for Files (see note below) can access ArchiveWeb and all its functions. If another user/group should be able to manage roles, super-user can allow access for them in the following ways:

- in ArchiveWeb under logged on user / **Manage settings** / **Permissions**
- in Archive Manager for Exchange Enterprise Manager on the **Tools** / **Options** / **User Roles** the given user has to be added with **Modify roles** option checked
- in the Archive Manager for Files Enterprise Manager on the **Settings** / **User management** tab the given user must have the **User management** permission allowed

Please note: Super-user is specified in:

- Archive Manager for Exchange (Enterprise Manager / Tools / Options / User Roles)

or
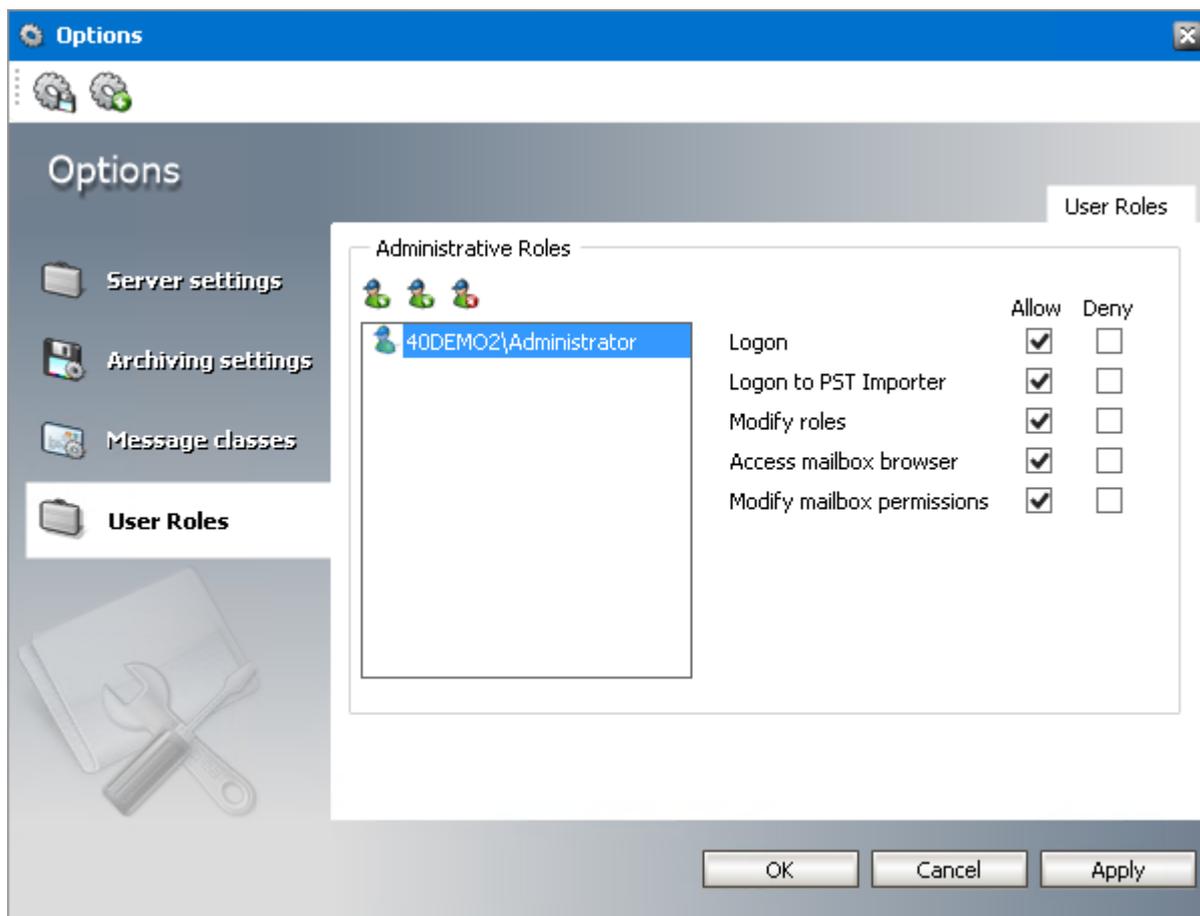
- Archive Manager for Files (Enterprise Manager / Settings / User management)
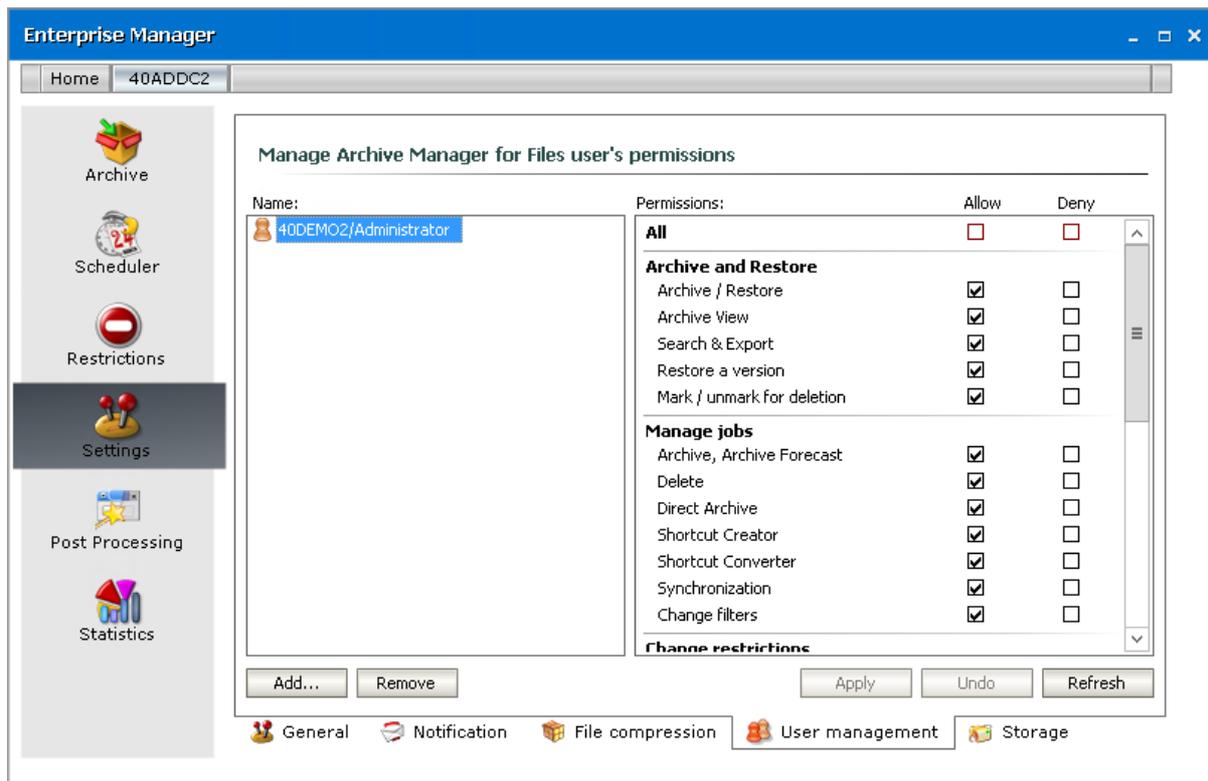
Roles and Permissions pages allow permission management on user/group level. Individual users can inherit permission or can be granted direct permissions. The priority of permissions follows this order:

1. Direct permission defined for a user (blue highlight under Permissions) on a server
2. Global direct permission defined for a user (blue highlight under Permissions)
3. Inherited permission (yellow highlight under Permissions) on a server
4. Global inherited permission (yellow highlight under Permissions)
5. Default settings (no highlight under Permissions)

All defined permissions apply only for the given instance of ArchiveWeb.

On these pages you can allow or deny access to ArchiveWeb features and menu options for individual users or groups, i.e. allow or deny roles. Under **Roles**, users are assigned to roles. Under **Permissions**, roles are assigned to users.

Roles

To display the **Roles** page, click the logged-on user name in the right-upper corner. Select **Manage settings** from the drop-down menu, then click **Roles** on the grey sub-bar. In the left pane select the server for which the roles should apply. Now you can assign users/groups to ArchiveWeb roles in the main pane.

List of roles is split into sections – Exchange Archive features are listed under **Exchange roles**, search features under **Search roles** etc. Select a role in the list view. All users/groups with access

to ArchiveWeb allowed in the Enterprise Manager are displayed under the list view. In case the desired user is not visible, click the *Find users and groups* icon ( ) to add it to the list. Current status of user/groups in respect to the given role is marked by a check mark.

If you click the *Delete* icon (✖) the user disappears from the list and will be assigned only the default roles.

NOTE: Users deleted in Active Directory but still existing in Archive Manager are displayed as strikethough.
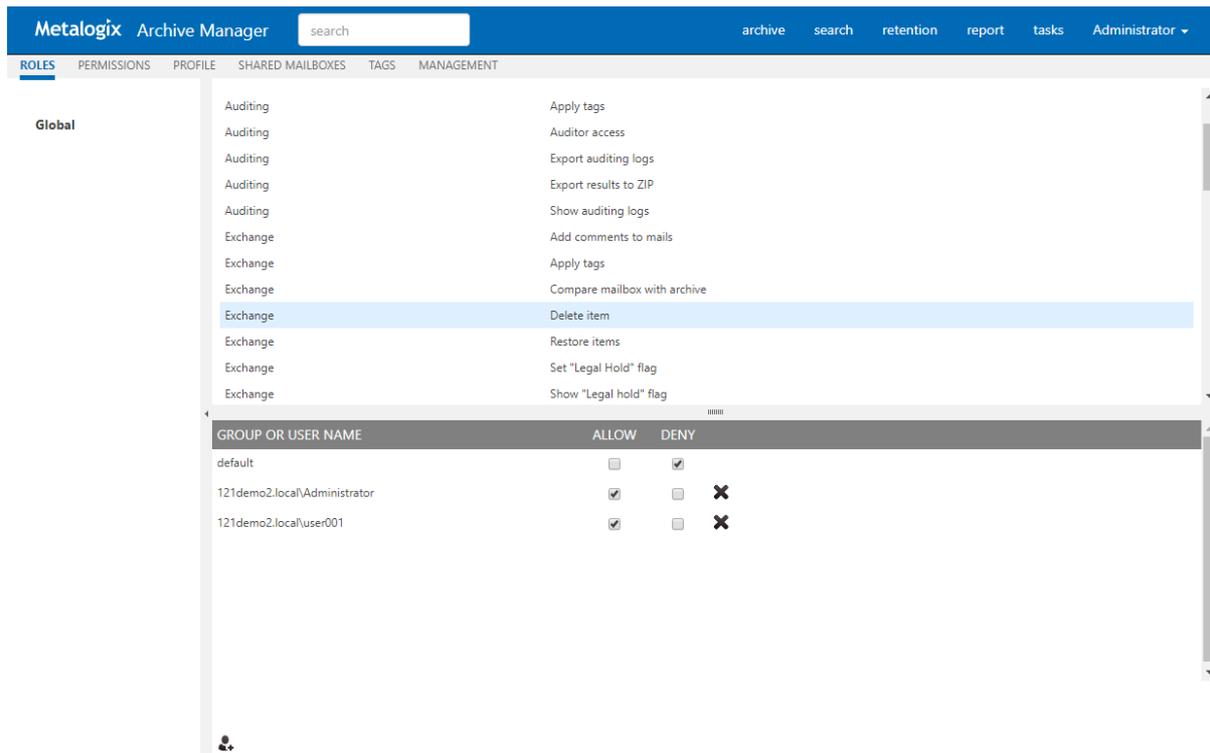
To assign users/groups to roles:

1. In the left pane the **Global** option is selected by default; i.e. the configured settings apply to all Archive Servers (File Archive or Exchange Archive) in the environment. Should you wish to apply settings only for a specific server, click it in the left pane; e.g. if you want to allow *Legal Hold* only for one File Archive Server and not for others.

2. Select the desired role in the list of roles.

3. If the desired user/group does not appear among associated users under the list view, you can add it. Click the plus sign ( ) on the bottom. The **Find users or groups** pop-up dialog appears. In the **Domain** drop-down box select the domain in which you want to search. Then search for the user/group.

4. Check the users/groups you want to manage and click **OK**.

5. The selected users/groups are displayed in the main pane. Manage their roles by checking **Allow** / **Deny**.

IMPORTANT NOTE:
If *UseGlobalPermissionsForAllServers* key is set to TRUE or this key does not exist in web.config, the *Roles* page lists only **Global** setting. In this case roles for users are set globally, i.e. role set will be applicable to all servers.

Otherwise, if the *UseGlobalPermissionsForAllServers* is set to FALSE, all available servers will be listed and roles can be set on any server/location. Using this option can slower login process because all accessible servers/locations needs to be searched for roles.

Permissions

To display the **Permissions** page, click the logged-on user name in the right-upper corner. Select **Manage settings** from the drop-down menu, then click **Permissions** on the grey sub-bar. Now you can assign ArchiveWeb permissions to users/groups in the main pane.

Super-user has ability to control access list, i.e. who is allowed to log into ArchiveWeb. Super-user has to set user and/or group who has permission to log in ArchiveWeb. The affected permission is "Logon in ArchiveWeb" and can be set in Manage settings in Roles and/or Permissions sites:
Default permission is ALLOWED – user is allowed to log in ArchiveWeb.

Users/groups which already have some roles assigned manually are listed on the right. Click the user/group to display and manage its roles in the right pane. List of roles in the right pane is split into sections - Exchange Archive features are listed under **Exchange roles**, search features under **Search roles** etc.

NOTE: Users deleted in Active Directory but still existing in Archive Manager are displayed as strikethough.
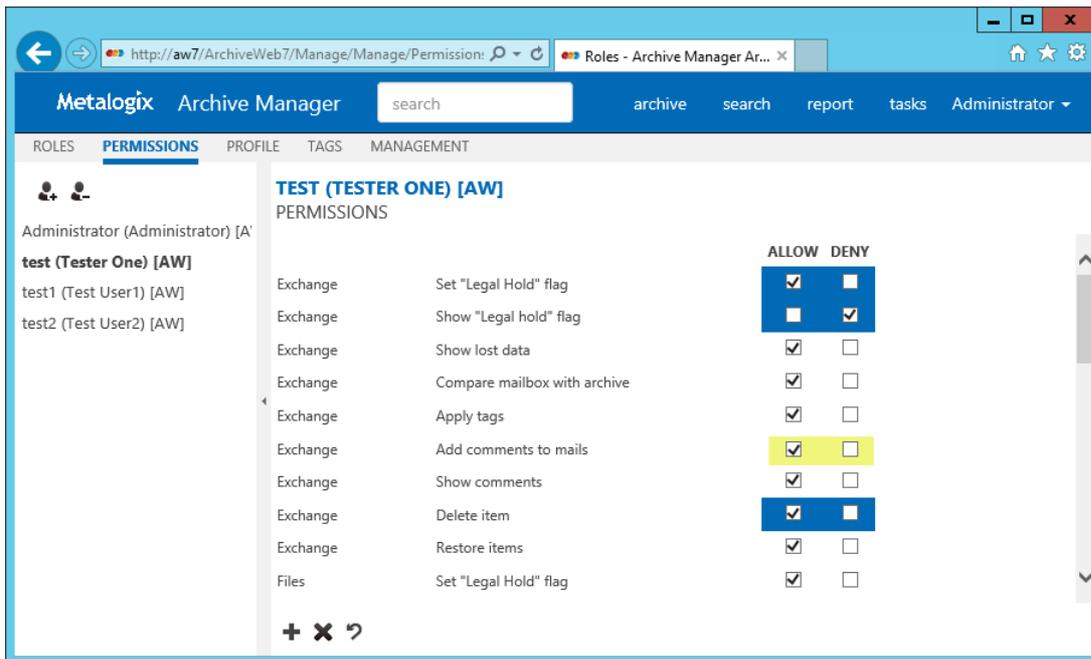
To assign roles to users/groups:

1. Select the desired user on the right. If the user is not listed, click the Add user or group symbol ( ) in the left pane.

2. In the **Find users or groups** pop-up dialog choose whether you'd like to search in Office 365 users or in Active Directory users.

   To search in Office 365 users – check **Office 365 user** checkbox. User can be searched by user-name, logon-name or display-name. Asterisk (*) wildcard can be used.
   Note: Office 365 users need to be previously imported via Archive Manager for Exchange.

   To search in Active Directory users – leave "Office 365 user" checkbox unchecked. Enter domain name and user/group name. Asterisk (*) wildcard can be used.

   When fields are filled by clicking the **Search** button search in desired category is invoked.Select the desired users/groups in the search results and click **OK**.

3. The selected user/group appears in the left pane. Select the user/group to manage its ArchiveWeb permissions in the right pane.

4. List of roles on the right is split into sections. Exchange Archive features are listed under **Exchange roles**, search features under **Search roles** etc. Further, each role can be allowed/denied on global level or on individual archive server level. Permissions which are set manually are highlighted in blue. Inherited permissions are highlighted in yellow. (More information on permission hierarchy find at the beginning of this chapter.)

To remove users/groups:

1. Click the *Remove users or groups* symbol (👤–) in the left pane.

2. In the **Remove users or groups** pop-up dialog select users or groups you'd like to remove.

3. Click **OK**.

Allow all (➕) and **Deny all** (✖) roles buttons on the bottom of the page can allow/deny all global roles for a user. To add user/group to the list, click the *Find users or groups* icon (👤+). Click the **Reset to default** (↻) symbol to reset all user permissions to default. For the list of default permissions see *Addendum / List of default ArchiveWeb permissions*.

List of default ArchiveWeb permissions

The table below lists default user's ArchiveWeb permissions. They are managed under **Roles** and **Permissions**.

	Role	Default value
Exchange	Set "Legal Hold" flag	Denied
Exchange	Show "Legal hold" flag	Denied
Exchange	Show lost data	**Allowed**
Exchange	Compare mailbox with archive	**Allowed**
Exchange	Apply tags	**Allowed**
Exchange	Add comments to mails	Denied
Exchange	Show comments	Denied
Exchange	Delete item	Denied
Exchange	Restore items	Denied
Exchange	Show own mailbox	**Allowed**
Exchange	Show shared mailbox	**Allowed**
Exchange	Show public folders	**Allowed**
File	Set "Legal Hold" flag	Denied
File	Show "Legal hold" flag	Denied
File	Apply tags	**Allowed**
File	Compare file system with archive	Denied

File	Find files without shortcut	Denied
File	Add comments to files	Denied
File	Show comments	Denied
File	Delete files	Denied
File	Restore files	Denied
File	Show files server	**Allowed**
Journaling	Access journal	Denied
Search	Search mails	**Allowed**
Search	Search files	**Allowed**
Search	Save search result to database	**Allowed**
Search	Export to mailbox	Denied
Search	Export to PST	Denied
Search	Export to ZIP	Denied
Search	Delete saved result	**Allowed**
Statistics	Mails - Show statistics	Denied
Statistics	Files - Show statistics	Denied
Statistics	Export statistics	**Allowed**
Management	Extend retention time	Denied
Management	Configure Files servers	Denied
Management	File management	Denied
Management	Manage scheduler	Denied
Management	Search servers management	**Allowed**
Management	Logon in ArchiveWeb	**Allowed**
Auditing	Show auditing logs	Denied
Auditing	Export auditing logs	Denied
Auditing	Apply tags	Denied
Auditing	Access all mailboxes	Denied
Auditing	Export results to ZIP	Denied
Auditing	Auditor access	Denied

Retention	Approve retention change requests	Denied
Retention	Create retention change request	Denied

Auditor Access

Journals in Exchange Server are used to enforce legal, regulatory, and organizational compliance in organizations by recording all or targeted email messages. In addition to journals, mailbox audit logs are also used to track who logs on to the mailboxes in your organization and what actions are taken by delegate users.

Auditor Access grants users the ability to view all mailbox journals that are imported, audit logs, retentions and search. Use this powerful feature with discretion.

To use this feature you must grant **Auditor access** permissions to at least two users. The two-user authentication mechanism works as follows: If John wants to log in as an auditor, he must have the **Auditor access** permission, and he must able to specify the user name of another user who has the **Auditor access** permission, before he can successfully log in as an auditor.

Steps to grant the Auditor access permission to a user

1. Log in to Metalogix Archive Manager ArchiveWeb with the credentials of a user who has the ability to grant permissions to other users.
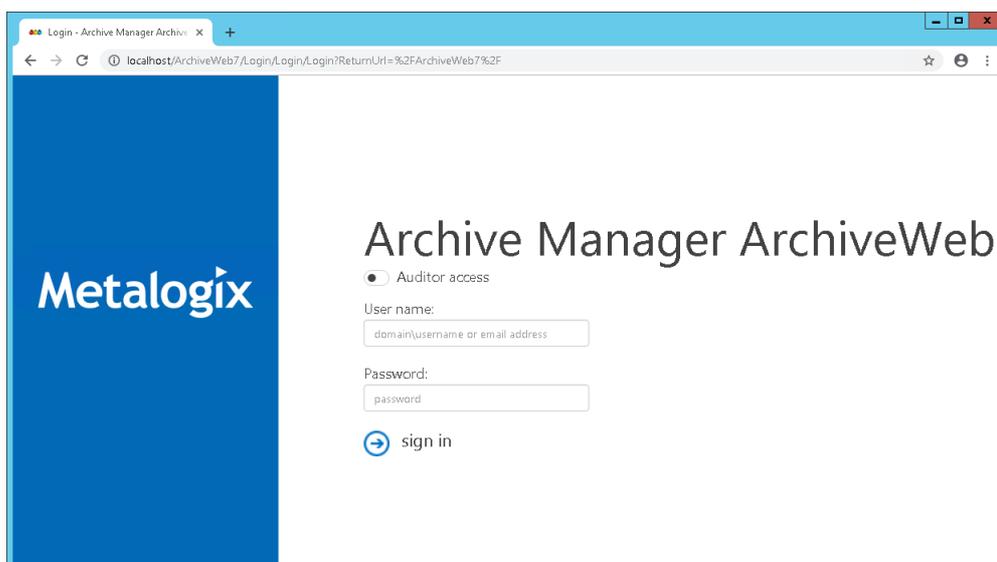
2. From your account name drop down, select **Manage Settings**.

3. Select the **Permissions** tab.

4. Click the **Add User** icon and locate the user from the **Find Users or Groups** search window.

5. Select the user from the user list on the left to display the permission set in the right-hand pane.

6. Select the check box for **Auditor access**.

> **NOTE:** No user is granted this permission by default. As a result auditor access is denied to all users including the super-user.
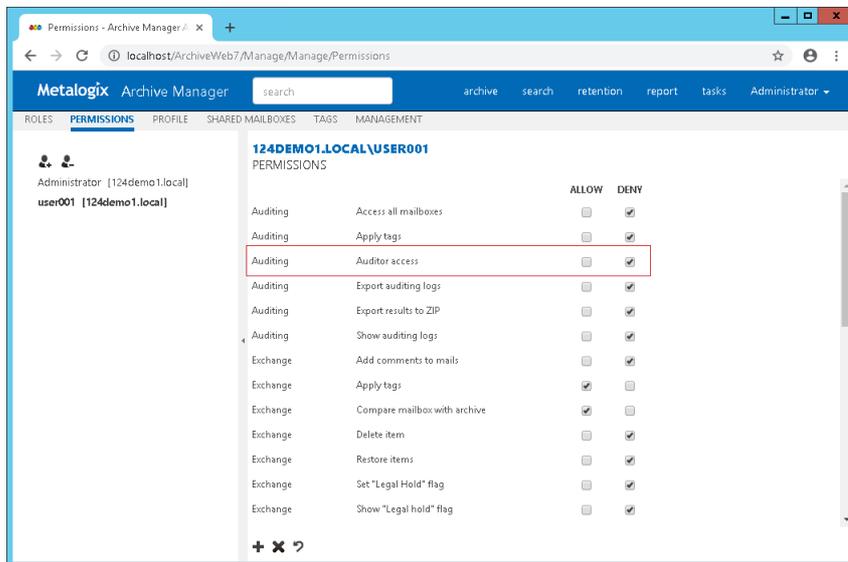
7. In the confirmation dialog that appears, click **Yes** to grant the **Auditor access** permission.

> **NOTE:** Granting the **Auditor access** permission automatically grants all permissions of type **Auditing**.
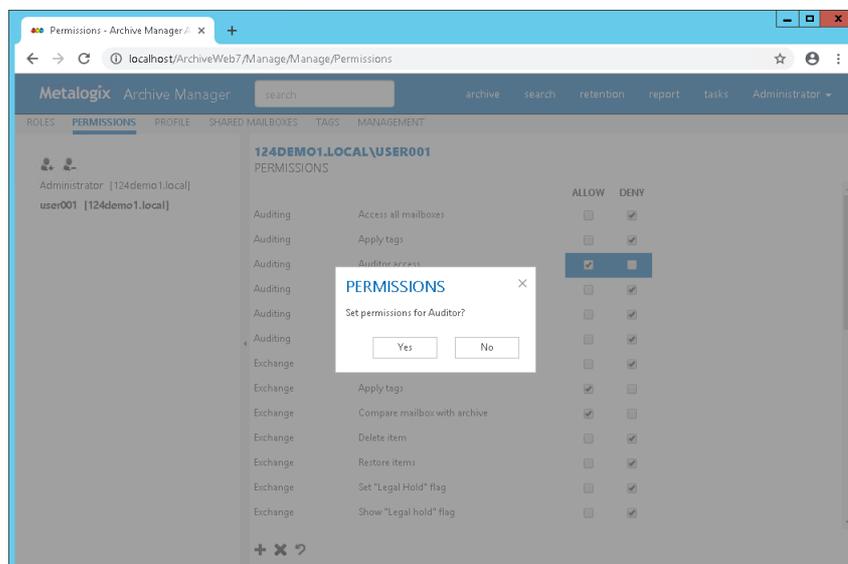
8. Repeat the above steps to grant the **Auditor access** permission to at least one or more users as needed.

Steps to log in as an auditor

1. If you have the **Auditor access** permission, enter your user name and password in the ArchiveWeb log in page.

2. Toggle the **Auditor access** button to turn on the feature. Notice that the user name field label changes to **Auditor 1 user name**. This is the account that will be used to log in as an auditor.

3. Click **sign in**. The **Auditor 2 user name** field appears.
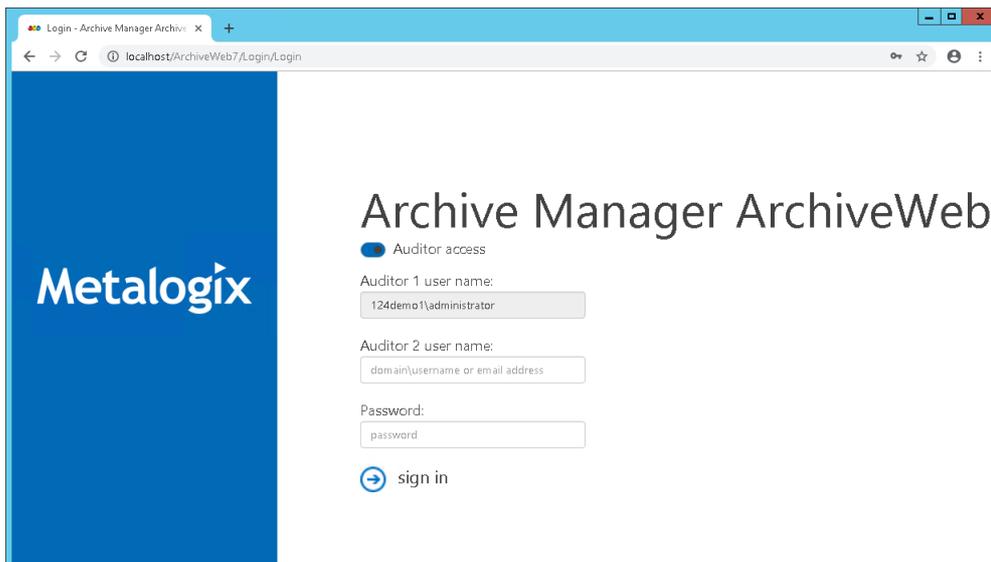
4. Enter the user name of another user who has the **Auditor access** permission.

5. Click **sign in** again.

6. If the two-user authentication succeeds, the Metalogix Archive Manager workspace appears.

7. From the top bar, click **archive** to open the archive view.

8. Click the **Exchange** tab.

9. Expand the **Mailboxes** node and select a journal to view its contents.
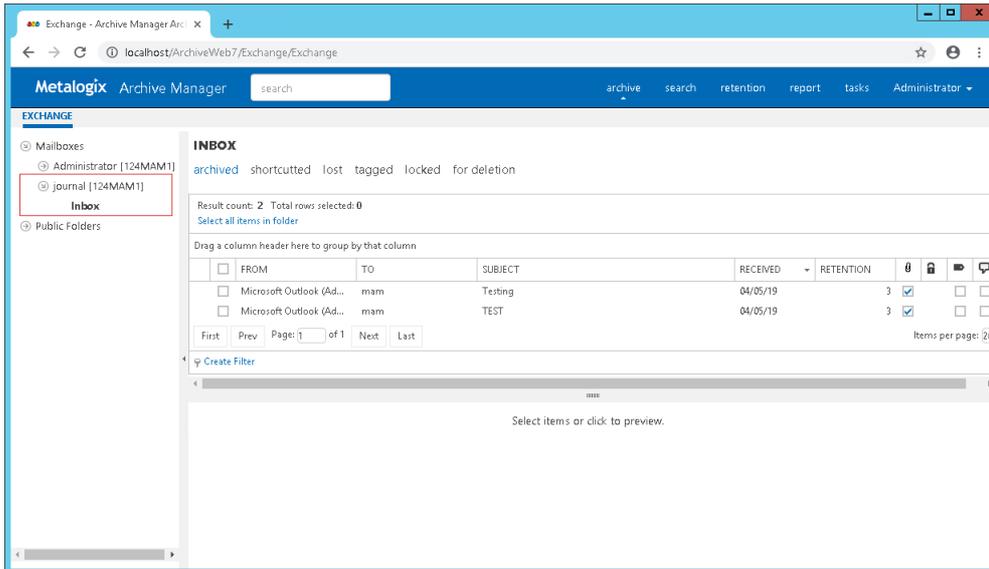
NOTE: If you have added a journal mailbox but cannot see its contents, check the **Mailbox type** property of the mailbox.

To specify a journal type mailbox follow the steps below:

1. Select the journal mailbox, and right-click to open the context menu

2. From the context menu select **Properties** to open the Properties window.

3. In the **General** tab, locate the **Mailbox type** property.

4. Set this value to **Journal** by selecting the value from the drop down.

5. Click **OK** to confirm the change and return to the mailbox.
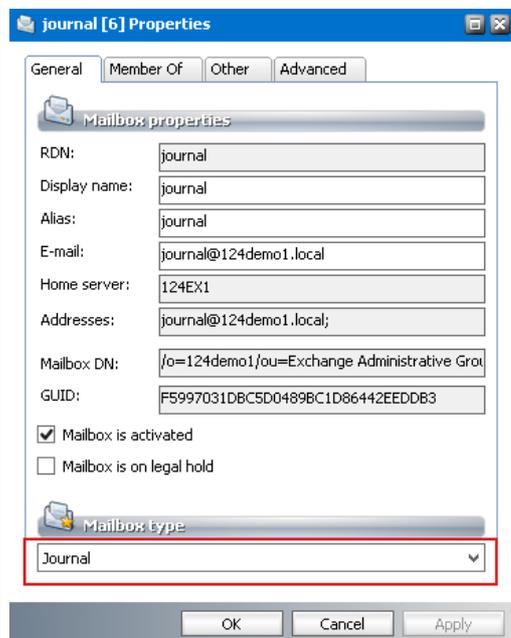
Profile settings

Adjust your ArchiveWeb layout to your liking and needs. Under **Manage settings/Profile** define the style, language, layout, file archive servers to be displayed etc. To display the **Profile** options, click the logged-on user name in the right-upper corner. Select **Manage settings** from the down-drop menu, then click **Profile** option on the grey sub-bar. Now you can specify profile:

Settings

After clicking the **Settings** tab in the right-hand navigation you can adjust the style, i.e. the design of ArchiveWeb to your needs and liking:

STYLE

- Under **Language** select the desired language for the application (The default language depends on the Windows local setting of the Archive Manager server.) NOTE: For this change to take effect, re-login is required.

- **Date/Time format** - select you preferred date and time format for the whole UI; default value depends on regional settings of your machine and the language selected in the Profile; when profile language is changed, date/time format is changed accordingly

- **Maximum preview size [MB]** – sets maximum file size that can be opened in a preview-pane. Displaying large item (with size more than 20MB) can cause out-of-memory exception. Default value is 20 MB.

TASKS

- **Automatic refresh interval (in seconds)** – how often the Task list will be refreshed (reloaded) when the Task list pop-window is open; Setting small number may cause some performance issues; default number is 10 seconds

- **Delete completed task** - indicates that successfully completed task which does not return a value (especially database tasks such as Add/Remove Tag, Set/Unset legal hold flag, Mark for deletion and Extend retention time) will be automatically removed from the Task list; Default value is false (do not automatically remove completed task).

SEARCH

- **Show search field in header**

The visibility of top search panel (common search panel) can be managed at:

- o Administrator level
- o User profile level

<u>Administrator level</u>
Administrator can globally hide the top search panel by adding/editing the *"ShowTopSearchPanel"* key in the ArchiveWeb's web.config file as follows:
```
<add key="ShowTopSearchPanel" value="false"/>
```

Default value for this key is true – which means that the top search panel is visible and user can manage its visibility in its user profile (Manage settings -> Profile).
If the value for this key is set to false – the top search panel will not be visible as well as **Show search field in header** option in user's profile will not be available, so user is not able to manage top search panel visibility.

<u>User profile level</u>
When an administrator did not set *"ShowTopSearchPanel"* key to false in web.config, user can manage the top search panel visibility in user's profile (Manage settings -> Profile) by setting **Show search field in header** check-box in the *Search section*.

- **Remember last mailbox / server selection** - indicates that selected mailboxes/servers from previous search are saved (it means next search operation will use these stored values). If this check box is unchecked, then for Metalogix Archive Manager for Exchange, all mailboxes in which the user has permissions are selected by default in Search>Mailboxes, and for Metalogix Archive Manager for Files, all servers in which the user has permissions are selected by default in Search>Servers. Default value for this setting is Enabled.

- **Maximum number of search results** – determines how many search results are returned from search (in previous versions of ArchiveWeb this setting was set globally in web.config under *MaxSearchResults* key)

- **Full-text query** - manages full-text search behavior; can be set as:

  - Exact phrase

  - Starts with *, e.g. *test

  - Ends with *, e.g. test*

  - Enclosed in *, e.g. *test*

  Setting in full-text query directs full-text search behavior, how the phrase will be processed by search engine.

  Default settings is "Exact phrase".

- **Hit highlight** - Available only for Metalogix Archive Manager for Exchange. Select this check box to highlight the search phrase in the search results.

- **Hit highlight color** - color picker to choose a color.

- **Common search behavior** – define the default search scope for *Common search* under the *Search* tab; common search will be then be performed accordingly only in the logged on user's mailbox OR in all mailboxes to which the user has access; if needed this option can be changed when performing Common search (see the respective section of this manual)

  o **Set default search scope** - By selecting the respective check boxes, define the default search scope for search from the top navigation ribbon.

  - Exchange – allows you to search in archived emails

  - Files – allows you to search in archived files

TREEVIEW

- **Maximum text length** - Treeview's node text will be trimmed to desired number of characters.

GRID

- **Paging** – set the *Endless paging* to display all items on one page or *Show paging* to limit the number of items on one page.

- **Journal highlight color** - choose a color from the color picker control to highlight the journal items.

- **Items per page** - If *Show paging* is selected, set the number of items to be displayed per page This number applies for *full grid* (if specified for the individual sections Exchange, Files etc.)

Individual sections - Exchange, Files, File Management, Audit

- **Columns** - in this section you can set columns to be displayed in individual list-views. e.g. in Archive list-view for Exchange (EXCHANGE/Archive drop-down) or in Search results list-view for Files (FILES/Search drop-down)

- **Show inactive mailboxes** – option to show inactive mailboxes in Archive and Search views; NOTE: Mailbox is inactive, if *Mailbox is activated* check-box is unchecked in the Archive Manager for Exchange / Enterprise Manager / Addressbook Manager
  NOTE: Administrator can override this setting by adding "**ShowNotActiveMailbox**" key in ArchiveWeb's web.config in <appSettings> section, for example by adding <add key="ShowNotActiveMailbox" value="true" /> will force override all users "Show inactive mailboxes" setting, so all users will have permission to show inactive mailboxes.

- **Use grid view** - allows to set grid's behavior; select **Full** or **Simple** grid to customize your list-views for individual sections. If:

  o **Simple** is selected - (default grid type) user works only with limited number of items (set via *Items per page* option in Profile or in the grid itself) (see the List view conventions section). Operations over grid such as *Custom filters*, *sorting*, *ordering* are performed over items

currently displayed in the grid. Using Simple grid dramatically improves grid performance especially when working with huge number of items. Simple grid can be used only for Archive views and Auditing, Search result pages use full grid.

	FROM	TO	SUBJECT	RECEIVED ▾	RETENTION	📎	🔒	🏷	💬
	Tester One	Administrator	The Emperor interrupted him.	12/17/2015 4:…	3	☑	☐	☐	
	Administrator	Administrator	a cold perspiration, sat up	01/09/2015 11:…	0	☑	☑	☐	
	Administrator	Administrator	officers, but every soldier	01/09/2015 11:…	3	☐	☑	☑	

Result count: **603**   Total rows selected: **0**
Select all items in folder

Drag a column header here to group by that column

First   Prev   Page: 1 of 31   Next   Last   Items per page: 20

🔎 Create Filter

o **Full** is selected - standard list-view is displayed; the number of items displayed per page can be set only under **Profile** / **Settings** / **Grid** section / **Items per page**. This grid works with the whole record-set at once, therefore this grid option is not recommended for huge data.

Available columns for individual list views

Exchange - Archive	Exchange - Search	Files - Archive	Files - Search	File Management	Audit - Report
Select All	Select All	Select All	Select all	Select All	Select all
From	From	Name	Name	Name	Log level
To	To	Server	Folder	Type	Log date
Subject	Subject	Archived date	Server	Status	Method
Received	Folder	Created date	Archived date	Start time	Computer
Retention	Received	Last modification date	Owner	Run interval	User
Attachment	Version	Owner	File size	End date	Category
Locked	Attachment	File size	Version	Maximum runtime	Tagged

Tagged	Locked	Retention expiry date	Locked	Notification	
Commented	Tagged	Retention remaining day	Tagged	Operation	
	Commented	Retention from	Commented	Enables	
		Locked			
		Tagged			
		Commented			

- **Navigation frame -** (used in Files) - possible options:

  o TreeView - classic treeview (as it was in previous versions); TreeView is a classical treeview. This one is recommended for most of customers with no too large folder structure.

  o ListView (pagination) - new type of navigation with pagination; ListView is a new type of navigation with pagination. This is recommended for customers with large folder structure, from 10,000 folders. The pagination improves navigation performance.

Default setting is TreeView.
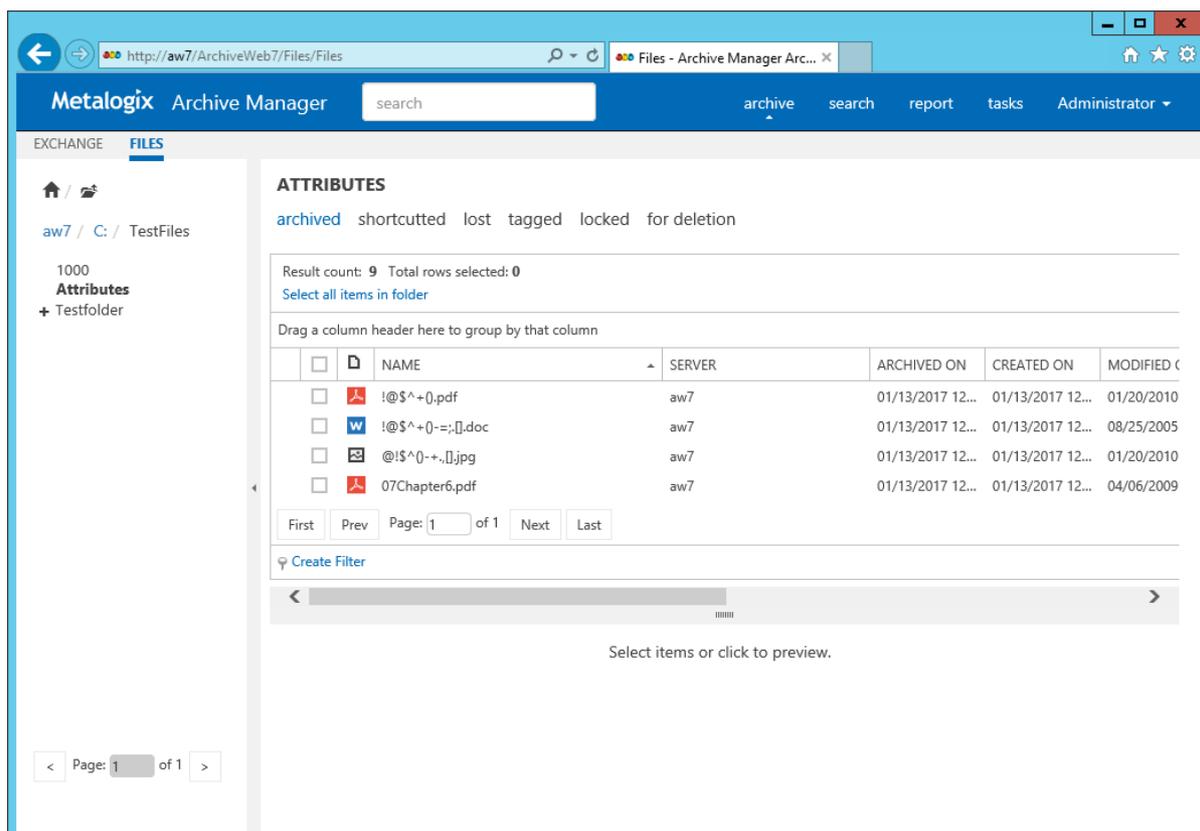
Home Page

Under the **Home Page** node select which page should be displayed after your logging to ArchiveWeb.

Global settings management

Super-user, when logged into ArchiveWeb, has the ability to manage default profile preferences for all users. This includes:

- Creating a default user's profile including set home-page, by clicking on **Set as default**

- Set default profile to all users, by clicking on **Set default values for all users**

NOTE: Super-user is defined in:
Archive Manager for Exchange -> Tools -> Options -> User Roles
or
Archive Manager for Files -> Settings -> User management

Creating a default profile

After a super-user made changes (set values for options that will be considered as defaults) in **Settings** and/or **Home page** tabs by clicking **Set as default** button at the right-bottom of the page, these settings will be stored in the database.

Set default profile to all users

When default profile exists, the **Set default values for all users** button is enabled. By clicking this button all user profiles stored in the database will be replaced by the default one.

For user who does not have stored profile, the super-user made default profile will be used by default.

Please note: Personalized shared mailboxes and tags stored in user's profile will not be replaced.

Default user (other than super-user)

Default user has ability to:

- Customize his/her profile by clicking on **Apply changes**

- Reset his/her profile to default one created by super-user, by clicking on **Reset to default**

Customize profile

After a user made changes to settings in his/her profile in Settings and/or Home page tabs by clicking **Apply changes** these changes are saved in the database. Since this change the user will use his/her personalized profile.

Reset profile

To reset his/her profile user can click on **Reset to default**. By doing this his/her profile will be replaced by default profile created by super-user. Please note: Personalized shared mailboxes and tags stored in user's profile will not be replaced.

Shared Mailboxes

This management setting is available only when Archive Manager for Exchange is installed and configured for ArchiveWeb.

When shared mailboxes are set for a currently logged user in Archive Manager for Exchange -> Tools -> Mailbox Rights Manager the grid will be populated and a user can select which mailbox(es) he/she likes to be listed in Archive's mailboxes tree and in searchable mailboxes.

User can manage list of available shared mailboxes, select which ones like to use:

- In Archive's mailboxes tree

- In Search's mailboxes grid

Tags

In ArchiveWeb, user can sort emails and documents by adding various tags to them. Tags are logged-on user defined categories. They help the logged-on user quickly find and distinguish emails/documents of one category e.g. important emails, documents regarding one particular event etc.

All tags are listed, edited or deleted under **Manage settings/Tags** tab. At first we describe how to create tags. Then the process of adding tags to emails/documents is illustrated.

When you click on the **Tags** tab for the first time, no tags are created. The list view is empty. To create a tag click the *New* option in the list header. A new row will be added in the list view. You simply specify desired tag properties in the available text boxes:

- **Tag Name** – enter descriptive name, e.g. "Personal", "Marketing" or any other

- **Background Color** – select the tag color or specify your *Custom color*

- **Apply For** – tag can be available globally or can be applied only for specific section of ArchiveWeb – Exchange archive, Files archive, Auditing etc. Should you check the e.g. Files archive option, the tag will be available only for File archive items

When all settings have been configured, click the *Update* option.

NOTE: Not all **Tagged items** tab functions may be available for the logged-on user. The functions must be allowed for the user. For more information see the **Roles** and **Permissions** sections.
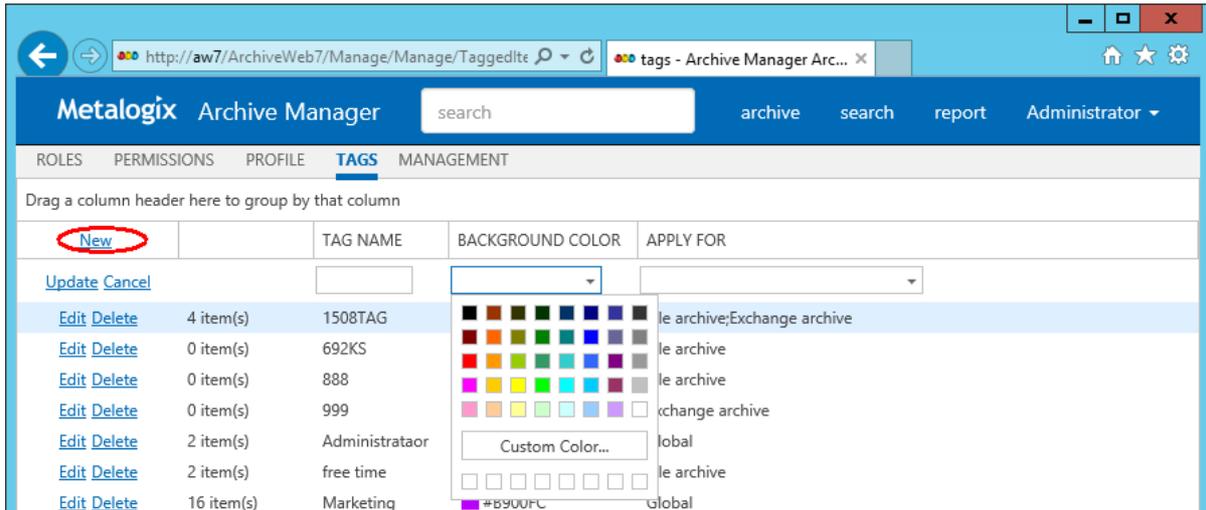
The tag will be added to the list of tags. Naturally, all tag attributes can be edited by clicking the *Edit* option for the given tag. When finished, click *Update*.
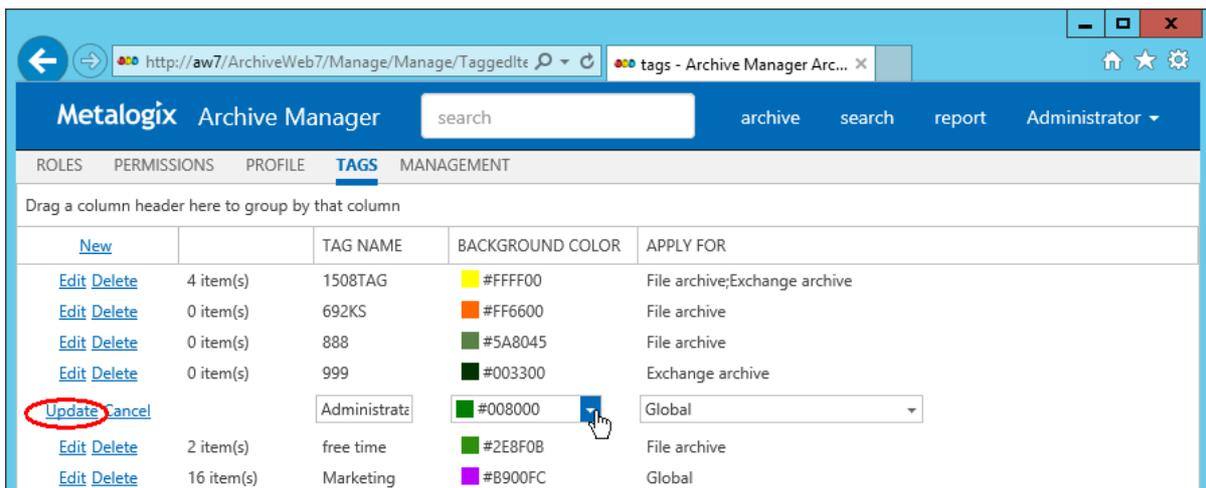
The list view also informs you on the number of items tagged by the given tag.

Adding tags to items

After the tag was defined, it can be added to:
- emails (in any mailbox folder or in a public folder)
- document
- auditing item

NOTE: Tag can be applied to all three type of items, if it is defined as a global tag (default). Otherwise it can be applied only to selected type of items (see above).

To apply the tag, locate the desired item under Archive/Exchange or Archive/Files or Report/Auditing tab and select it. Then open the **More actions** link (MENU) from the right upper corner in the preview pane. In the **More actions** menu click **Add tag(s)** command.
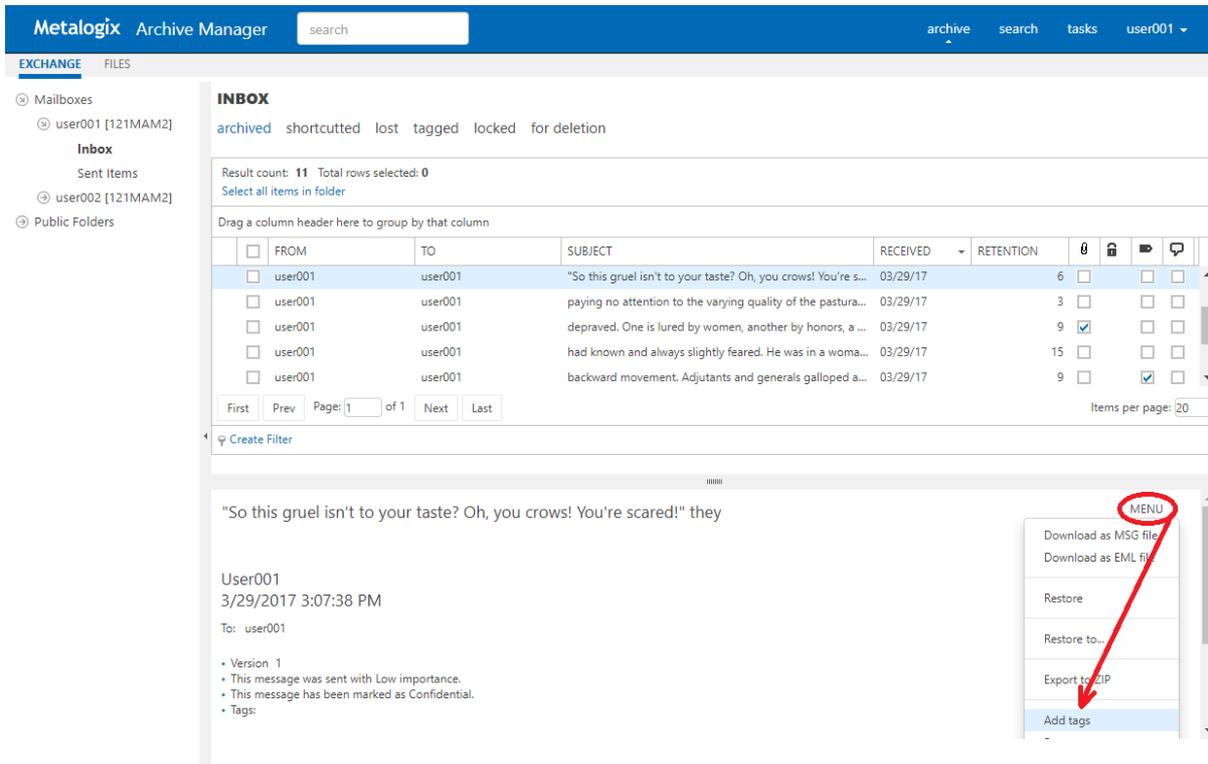
In the pop-up window select the tag(s) which you want to add to the item and click **OK**.
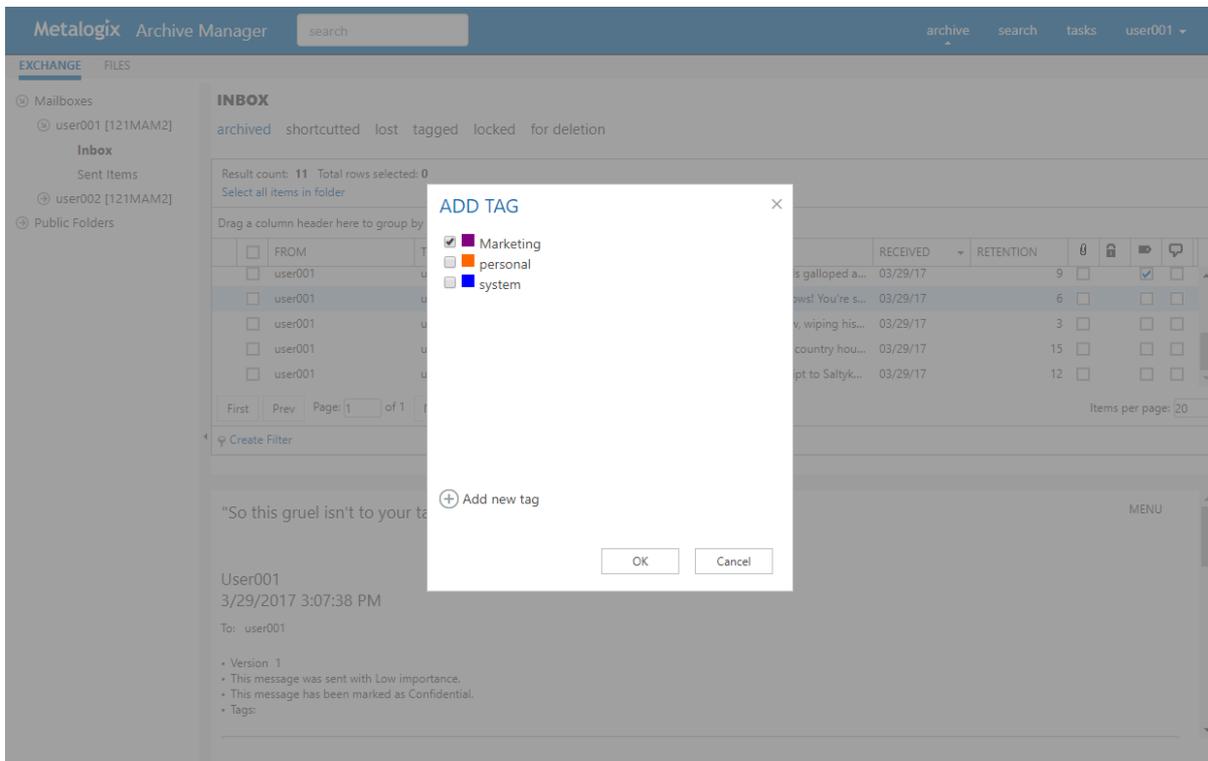
NOTE: You can also create a new tag if you click the **Add new tag** option and click **Add**. The *Add New Tag* dialog appears where a new tag can be defined.

Once the tag has been added to the items, it will be visible in the emails/documents list view (see the screenshot below) and also in the preview.
A tag can be removed in the preview or via the **More actions** link (MENU) by clicking the **Remove tag** command.
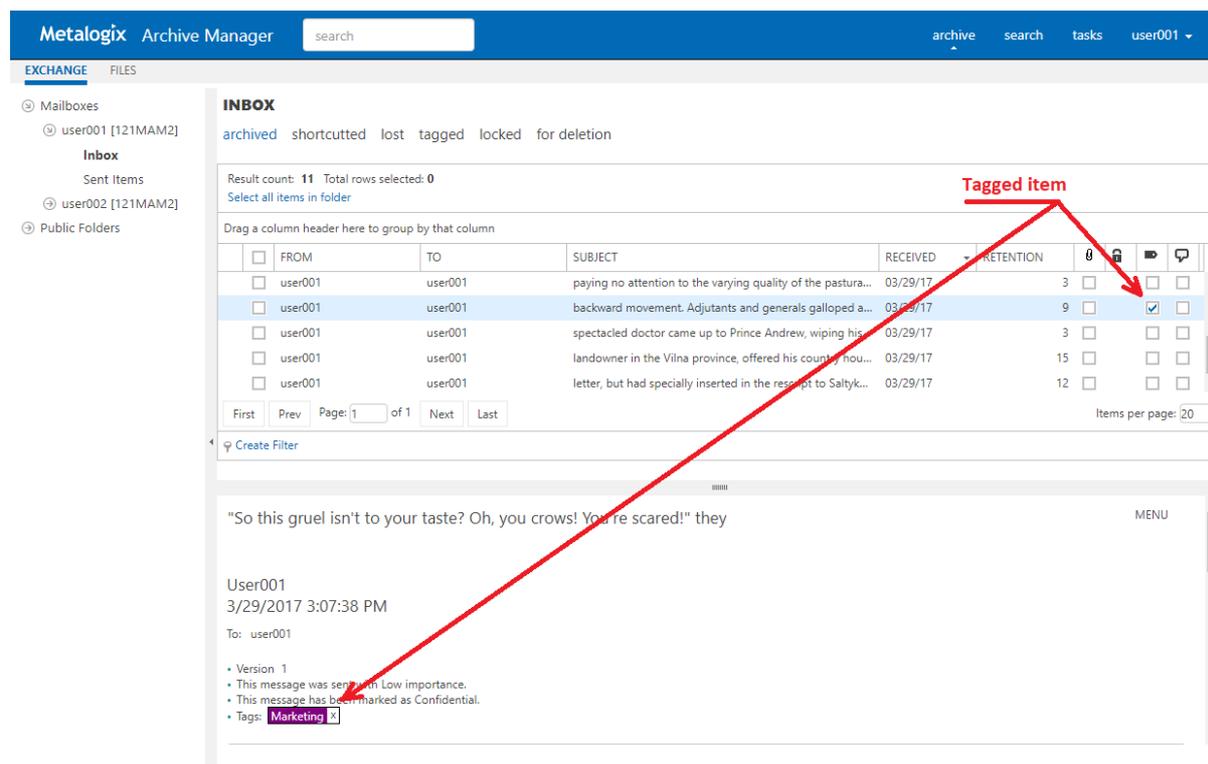
Management

Management section constitutes centralized dashboard where user with appropriate permissions can manage specific configuration settings in the following sections:

- File Management

  Adding, editing and removing of Archive Manager for Files servers which together establish the file archive system. Additionally, with Scheduler capabilities, Archive Manager for Files jobs are easily managed in the same way as on the Scheduler tab of the Enterprise Manager (Archive Manager for Files).

- Search Management

  Registering and managing search servers in the environment.

File Management

File management section under Manage Settings / Management is displayed only if Archive Manager for Files is installed and the appropriate permission is set for the user. This section allows managing Archive Manager for Files:

- **Archive Servers** - managing archive and retrieve servers

- **Scheduler** - managing scheduler jobs

Archive Servers

After clicking the **Archive Servers** tab, the available Archive Manager for Files servers will be listed in the main pane.

You can change the display name, protocol or port for the given server by clicking the *Edit* option next to the given server.

By clicking the *Delete* option the respective server will be deactivated in the ArchiveWeb, i.e. it will not be accessible for the users via ArchiveWeb and it will not be possible to search it either.

To add a new Archive Manager for Files server click *New* option in the list header. It will add new row to the list where you can specify the File Archive Server properties. Each server (*Archive Server*) can be **backed-up** when you enter another server with installed Archive Manager for Files as a *Retrieve Server*. The *Archive Server* folders and files will be accessible via ArchiveWeb even when the server is decommissioned/inaccessible. (For more information on this feature see the *"Alternate Access Servers"* document.)

Finally click *Update* for the newly added server. The new server will be listed on the **Files Archive tab**.
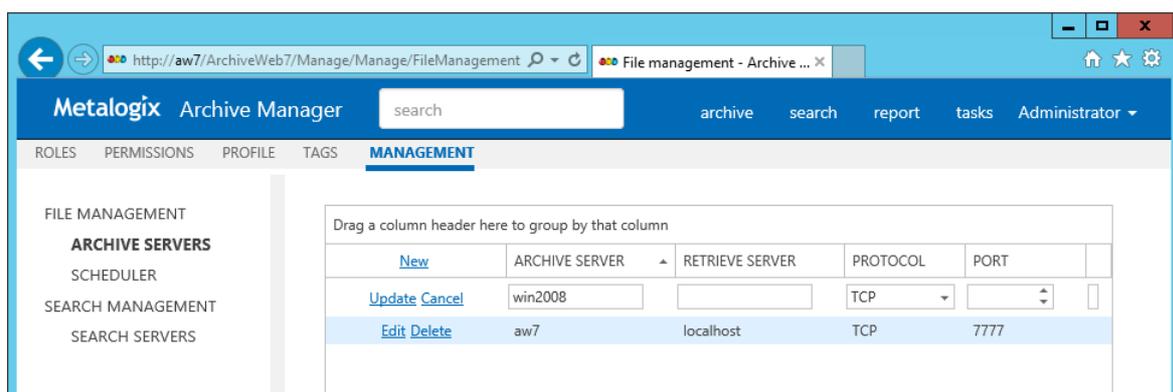
Scheduler

After clicking the **Scheduler** tab, you can manage Archive Manager for Files jobs or preview job reports on you Archive Manager for Files server. This tab basically offers the same functionality as the *Scheduler* tab of the Enterprise Manager (Archive Manager for Files).
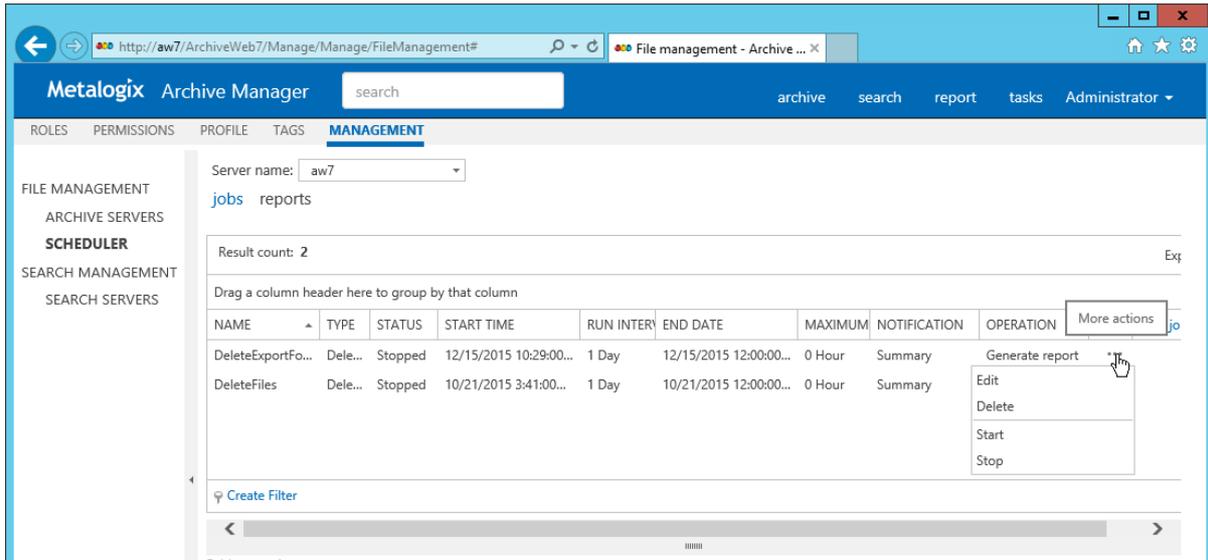
Jobs

To manage jobs user has to select a server from **Server name** drop-down. If any job exists (ArchiveWeb currently supports only Delete jobs) for the specified server, the grid will be populated.

For each listed job, a More actions menu appears by clicking the More actions icon ".." on a respective row. This menu contains functions for **Edit**, **Delete**, **Start** and **Stop** the job.

New job can be created by clicking ***New job*** link in the grid header.

Edit or new job pop-up window is the same (see below) and contains two tabs:
    Settings - contains job description information
    Folder - defines folders that will be affected by a job
    NOTE: For job to process data, folders must be specified.

<u>Settings tab</u>

Job name - enter name for the job

Job type - in the drop-down select the desired job type (currently only Delete jobs are supported); for more information on job types see the *Archive Manager for Files Administration Guide*.

Enable - check to activate the job

Enable notification - ArchiveWeb will send notifications about the given job as configured in Enterprise Manager (Archive Manager for Files) on the Settings/Notification tab (for more information see the *Archive Manager for Files Administration Guide*)

Notification type - *Summary* or *Detailed* can be selected

Operation mode - this setting is available just for *Delete* job (and *Synchronization* job in Enterprise Manager)

> Click on the Operation mode field. Then click on the down arrow and select the operation mode:
>
> - Reporting mode - no action is being taken just a report is generated. This is useful as administrators first have a report on what is going to be done. The report can be checked and modified if necessary.
>
> - Process report mode – files from the previously generated report are processed. Administrator is able first to check and modify the list of files going to be processed (i.e. deleted or synchronized)
>
> - Process immediately mode – processing files without any report (not recommended)
>
> The Report file field displays the path to the generated report (e.g.<installdir> \fsaPamLogs \sync \ sync.report).

Start time - specify the first day when the job should run

Run interval - specify how often the job should run

End date - specify the last day when the job should run

Maximum runtime - specify the maximum time (in hours) during which the job will be running

Folders tab

Job scope must be defined on the Folders tab. Folders for the job to process are selected by clicking in a respective check-box.

NOTE: Red check-box ( ) specifies that the folder will be processed recursively.
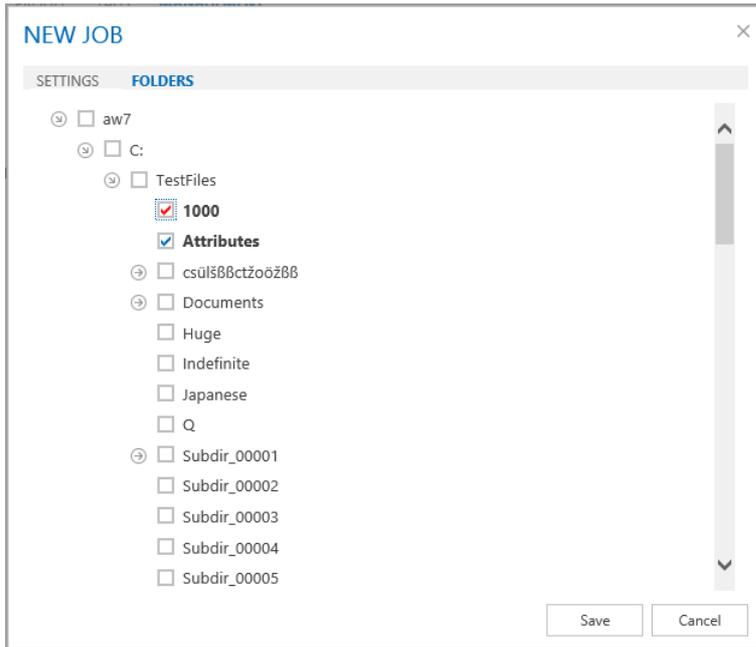
When all is configured as desired, click **Save**.

Reports

This section is a report viewer for jobs.
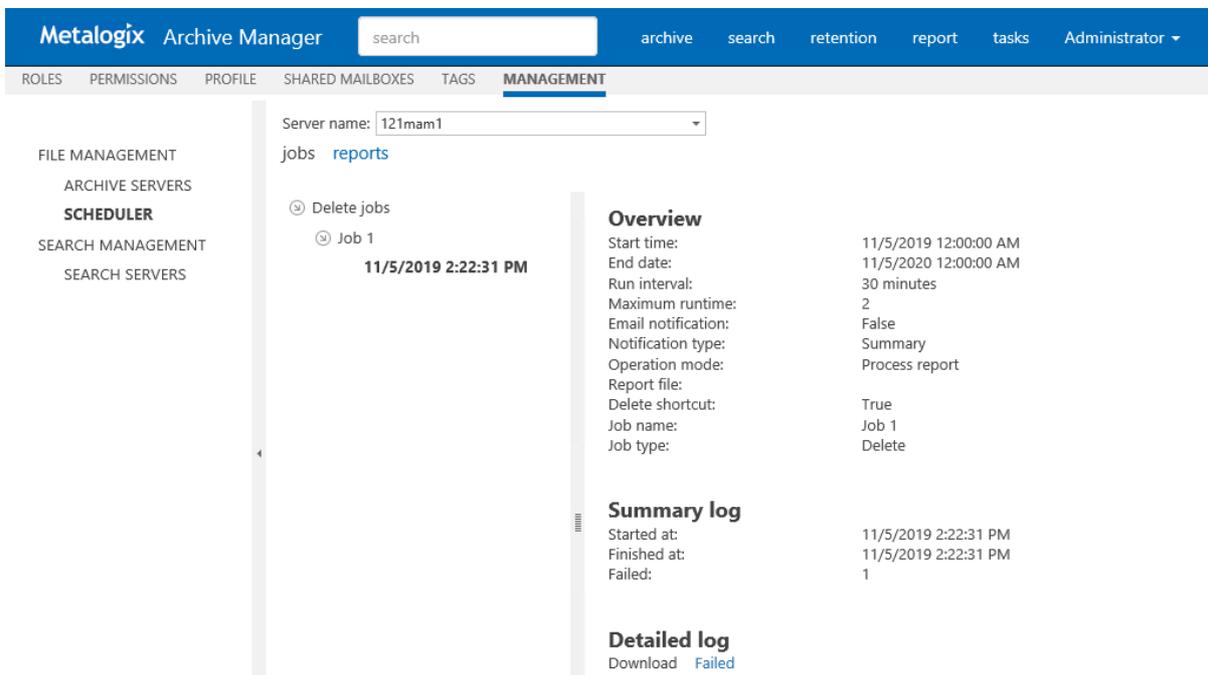
By selecting a job created/performed time the right pane will be populated by job's information

Overview – job description information

Summary log – information about running

Detailed log – contains links for download.
According to "Operation mode" (listed in overview):

- Generate report – list of items to be "Affected" by a job
- Process report – links to download "Succeeded" and if any "Failed" items

Search Management

Search Management section is displayed only if appropriate permission is set for the user. This section allows managing of Search servers installed in the environment. Specifying search servers on this tab is prerequisite of search functionality. With no search server defined, search is not available.

After clicking on the **Search servers** menu, the available Search servers will be listed in the main pane.
NOTE: If web.config file contains information about Search server(s) (this is applicable if upgrading from previous versions of ArchiveWeb) the list will be automatically populated.

By clicking the **Delete** option the respective Search server will be removed, i.e. it will not be used for Searches.
To add a new Search server click **New** option in the list header. It will add a new row to the list where you can specify the Search server properties.
NOTE: Avoid using *localhost* as Server Name.

By clicking the **Edit** option next to the given server, you can change server properties. The *Search Scope* marks for which Archive Manager the given search server has been installed (Archive Manager for Files/Exchange).

For Location - this property is applicable only for Archive Manager for Exchange search servers. For a Search server you can specify a location which the respective Search server "covers" by selecting a location from a "FOR LOCATION" drop-down. This drop-down lists all locations defined in Archive Manager for Exchange in a location where the logged in user has active mailbox. (For more information on locations see the *Archive Manager for Exchange Administration Guide.*)

Provided there are more Archive Manager for Exchange locations in the environment and each has it own search server, the given search servers must be listed with correct location.

NOTE: Should there be more locations but only 1 search server for all, leave the *For Location* property blank.
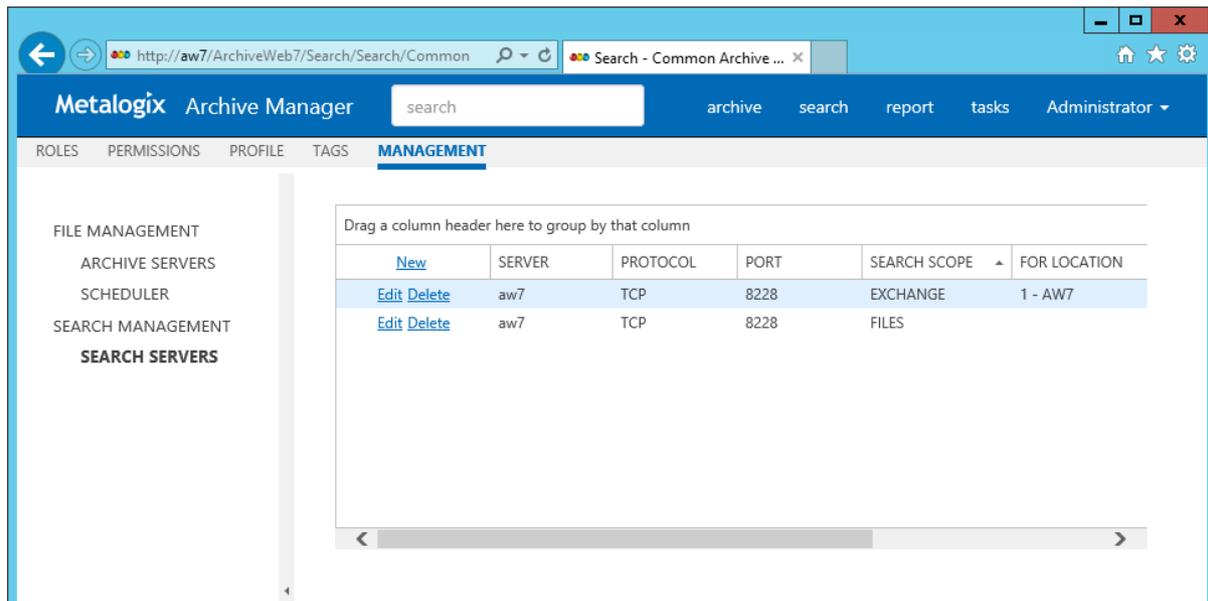
Federated Search

If you're using more locations, you can setup a Search service for each location. Each Search service will index items on its location.

To setup Federated search (search over more search servers) in ArchiveWeb you have to modify the Search servers (Search Management) by specifying "FOR LOCATION" value.

Federated search allows you to collect results from more search servers in one search request. You can perform federated search over all available (according to permissions) search areas:

- Exchange
- Files
- Common

Archive: Files tab

This tab is displayed in ArchiveWeb if Archive Manager for Files is installed in the environment. It allows access to all items archived via Archive Manager for Files form the configured servers. After clicking the **Archive** from the main bar and then **Files** from the grey sub-bar, left navigation pane displays accessible file archive servers offering access to all folders with archived documents. By clicking the arrow sign next to the server/folder, user can unfold the structure down to the desired folder.

Navigation frame can be:

- TreeView – classic treeview

- ListView (pagination) – new type of navigation with pagination

The default setting is TreeView. (Set under Manage Settings / Profile.)

NOTE: [OFFLINE] text next to the file server in the left tree-view (as "aw7 [OFFLINE]" in the screenshot below) indicates that the given server has been decommissioned in your environment and is accessible only via ArchiveWeb. This access must be configured under Manage settings/Management/File Management/Archive Servers.
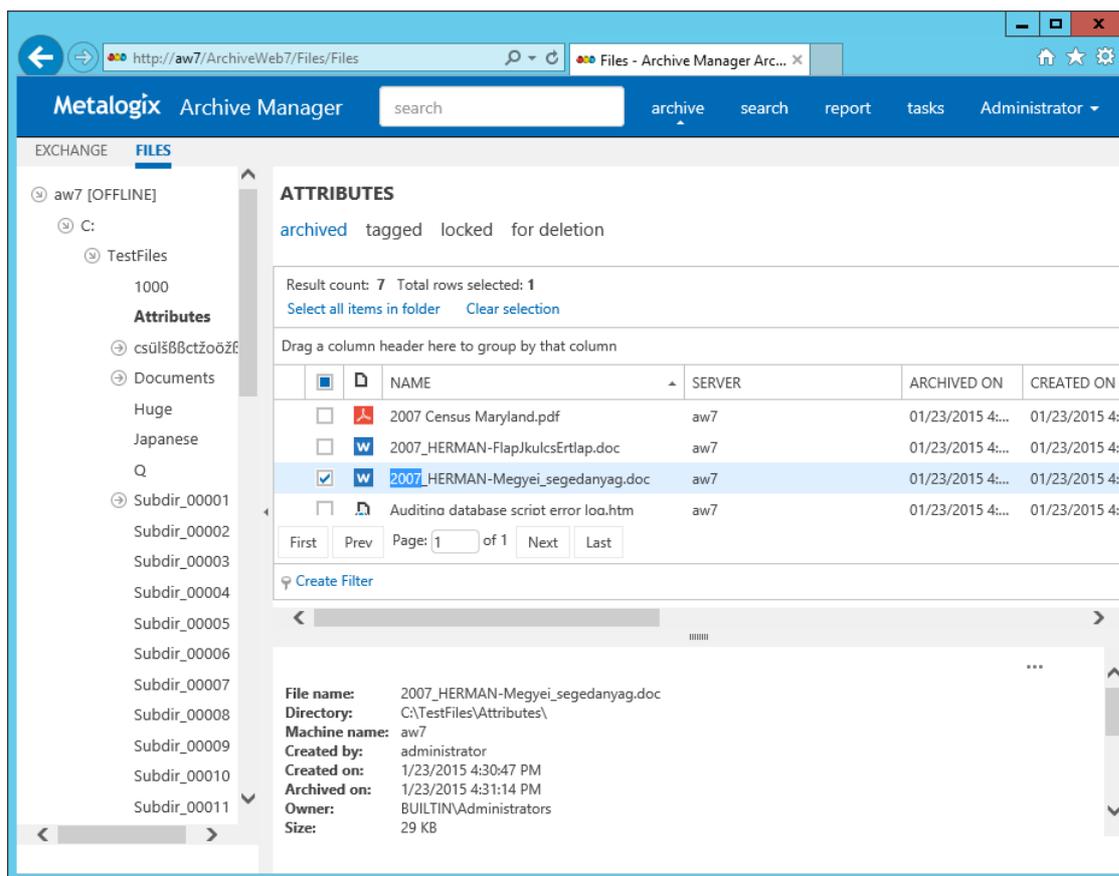
The content of the folder selected in the left pane is displayed in the main pane of the window. The list can be filtered by categories as listed above the list view:

- archived – all folder archived items are visible

- lost – items that were archived but later deleted from the file system are visible; these LOST ITEMS are not accessible in the file system any more

- tagged – items marked with any tag are visible

- locked – items that were locked are visible

- for deletion – items that were marked for deletion are visible; they are still in the archive and may be also visible in the file system as usual, but when their retention time elapses, they will be completely deleted (see "Mark for deletion" option in the "More actions" section)

For further filtering options see the "*List view*" section further.

List view

With advanced list view functionality provided with every ArchiveWeb list view you can easily search even in huge lists of files and adjust the list to your specific needs. In short, list can be:

➢ sorted by any column – click the little arrow in the column header
➢ grouped by any column – drag the desired column to the bar just above the list
➢ filtered – click the filter link with icon ( ) to create/modify the filter

(For more details see the "List view conventions" section.)

The following information are included directly in the list:

- version indicator (➡) - little arrow next to the list item indicates that the given file has also other version(s) in the archive; click the arrow to display it
- file format icon
- file name
- server
- archived date
- created date
- last modification date
- owner
- file size
- retention expiry date
- retention remaining days
- retention from - document archive lifetime staring point (as specified in the Archive Manager for Files console at retention category creation); possible values: file creation time, archiving time or last modification time. The "override" value indicates that the original retention has been changed in ArchiveWeb.
- lock status (🔒) – yellow lock icon if the file is locked
- Tagged status (🏷) – checked if the file is tagged
- Commented status (💬) – checked if there are comments associated with the file

List columns can be managed (show/hide) in the *Columns* section of the user profile (click **<UserName> / Manage settings / Profile / Settings**).

When you select the document in the main pane, its properties (date of creation, size, shortcut size etc.) are displayed under the list view in the preview pane. Preview is available only for some file types, e.g. for media files (image, video, audio files, and PDF) there is also preview available.
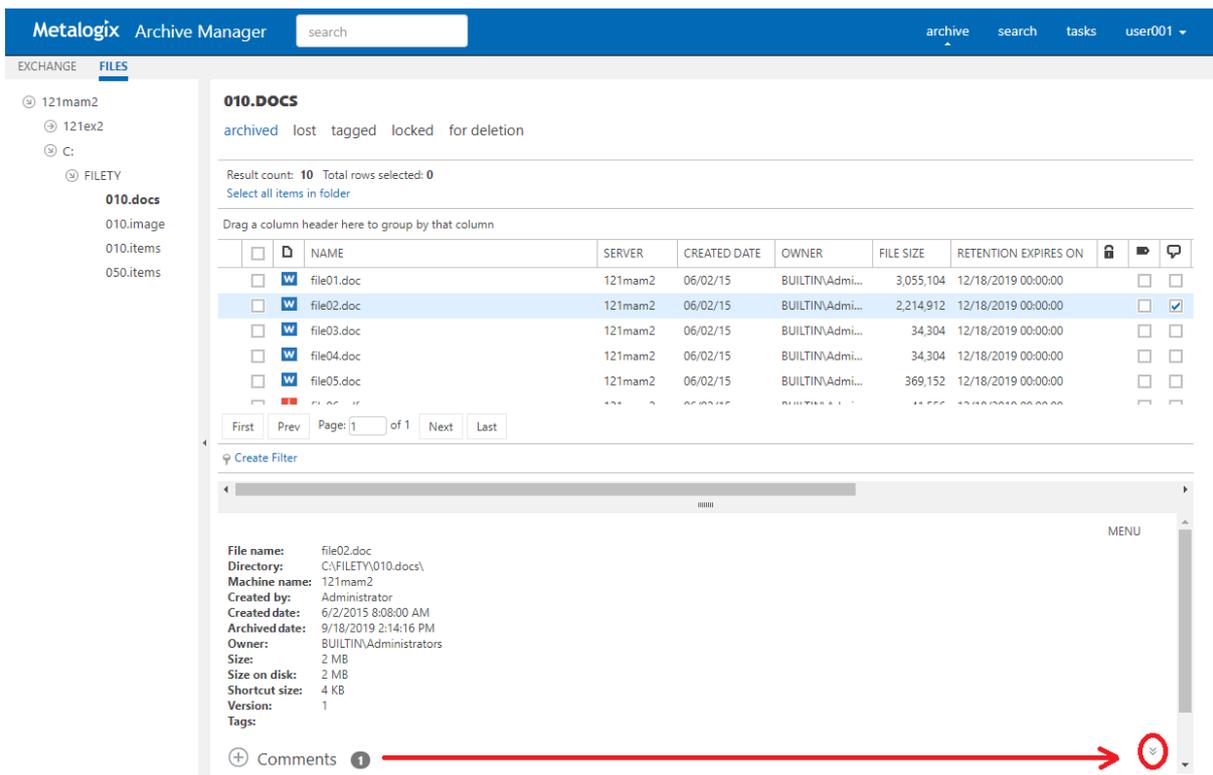
In the **Preview** pane, it is possible to add comments to files. Simply scroll down in the **Preview** pane. Then click plus sign (⊕) next to **Comments** heading. Enter a note in the provided text box and click **Yes**. The comment with creation details is displayed under the **Comments** heading. Should the number next to the heading indicate some comments but none is visible, click the show/hide double-arrow (⌄) to the right (see the screenshot below). The comments will be displayed.

NOTE: Not all **File Archive** tab functions may be available for the logged-on user. The functions must be allowed for the user. For more information see the **Roles** and **Permissions** sections.

More actions

In ArchiveWeb the user can search in archived documents, lock them or adjust the list view. All these and also other tasks are accessible through the **More actions** menu.

Use the **Download** option to download the selected documents.
Performance hint: If Files server contain large files (with size more than 20 MB) it is possible to speed-up the download time and save some system resources. Administrator can set the following keys under <appSettings> in the ArchiveWeb *web.config* file:

Pam4HSMWS	- defines URL of PAM4HSMWS web-service
Pam4HSMWSMethod	- defines download method used, possible values: 1 (file is downloaded to cache first), 2 (file is accessed directly in HSM server). Preferred value is 2.
DownloadChunkSize	- size of the chunks used for download (default value is 32768 bytes)

Example of settings:
```
<add key="Pam4HSMWS" value="http://AW7:7782/PAM4HSM/PAM4HSMWS.asmx" />
<add key="Pam4HSMWSMethod" value="2" />
<add key="DownloadChunkSize" value="32768" />
```

Via the **Restore** option you can restore the whole archived item to the current shortcut location (the item in the archive is not changed in any way).
Use the **Add tags / Remove tags** options to tag your items. You can use already created tags or create new ones directly in the pop-up dialog.
Use the **Lock document / Unlock document** option to handle document locks (for more information see the "Legal hold – lock documents" section).

The **Mark for deletion** option marks the given item(s) for deletion in the archive, i.e. when the retention time elapses, the item(s) will be completely deleted from the archive. Until then they stay unchanged.
To display only items marked for deletion, click the deleted category above the list view.

Use the **Extend retention time** option to INCREASE the time for which the item cannot be deleted from the archive. Retention time is set by selecting a date from a Calendar control. Retention time that points to the past cannot be set. After the specified date the item can be deleted manually or by a Delete job if such is scheduled in the Enterprise Manager (for Files).

HSM defines retention as a number of months from the time when the document was stored in HSM or from the time when the retention was changed. These different approaches cause that retentions in Archive Manager and HSM do not match. Especially if file's creation/modification date is used for document's life-cycle or the retention of the document is changed. In such situation the document in HSM is always protected longer than in Archive Manager. Because of this, the document can remain in HSM and can't be deleted by the delete job until HSM retention expires.

The difference between HSM and Archive Manager retention can be up 2 months.
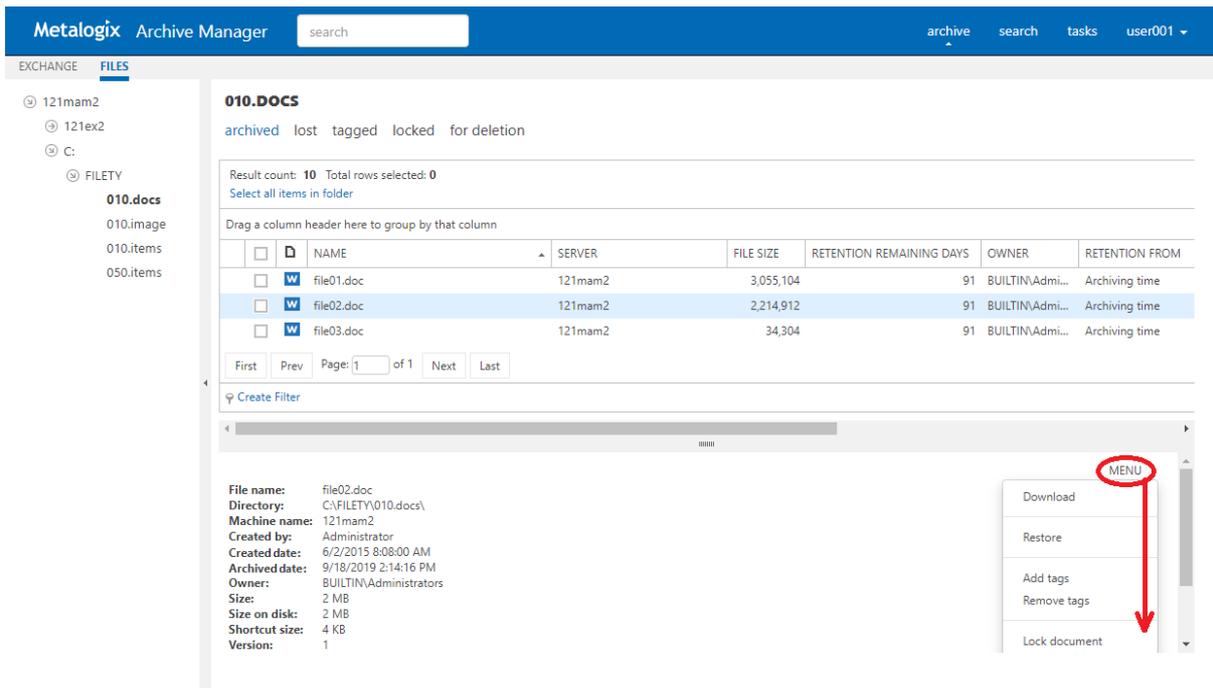
Under the File Archive tab the user can access all files that were archived. Even if the archived file was deleted from the file system, it is accessible in ArchiveWeb. Such items, i.e. archived items which have no shortcut in the file system, are so called LOST ITEMS.

On the **ALL** tab it is not possible to distinguish between these lost items and normal items with shortcuts. However, to see only lost items of the given folder, select the **LOST** tab above the list view.

Legal hold – lock documents

For audit purposes documents can be locked by the user. When the document is locked, it remains in the state in which it was locked, i.e. it cannot be deleted, edited etc. simply it cannot be changed in the system.

To lock documents, select the desired documents in the main pane. In the right upper corner of the preview pane click the **More actions** link (MENU).
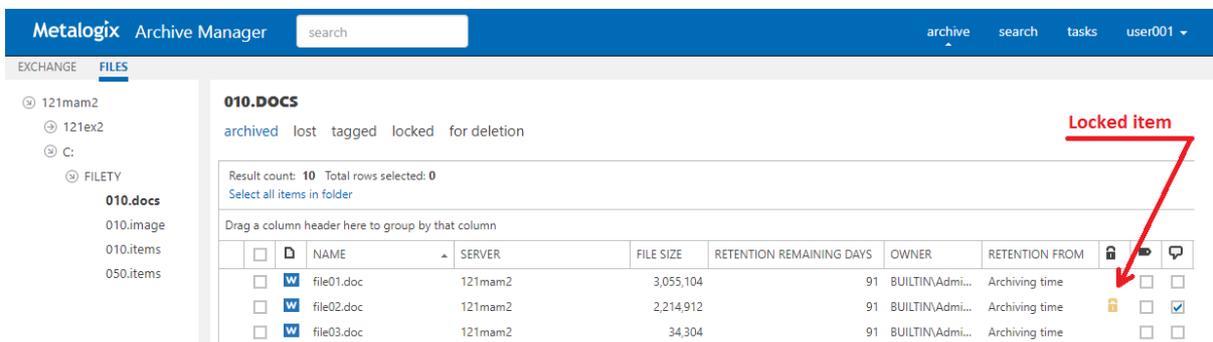
From the menu select **Lock document**. Locked documents will be displayed with a lock icon ( ).
The lock icon is yellow if you have locked the item and grey if it has been locked in a shared
folder by another user.

NOTE: Unlock documents by selecting **Unlock document** from the **More actions** menu.

NOTE: To display only locked items in the given folder, click the LOCKED tab above the list view.

Search

To start searching with advanced search options, just click on the **Search** tab in main pane. The **Search** sub-bar contains the following nodes:

- **Search** – allows you to search through archived emails if Archive Manager for Exchange is installed, or search through files if Archive Manager for Files is installed.

- **History** – logs all searches performed during one logon session

- **Templates** – contains saved search templates and search results

OPTIONAL FEATURES:

- **OCR Search** – it is possible to search also in text in pictures although this technology has some limitations, e.g. too small text may not be correctly recognized. This feature is optional and has to be enabled in Configuration tool / Post Processing / OCR Engine

In the next sections we deal with different search types one by one. In the last section you can read about search templates.

NOTE: Not all **Search** tab functions may be available for the logged-on user. The functions must be allowed for the user. For more information see the **Roles** & **Permissions** section.

Common search

To search in both Archive Manager for Files as well as Archive Manager for Exchange archives (accessible only if both components – Archive Manager for Exchange, Archive Manager for Files - installed), you can use the common full text search. It is accessible only if the Exchange and Files check boxes have been checked on the Criteria page. Common search runs on all accessible File servers plus on logged on user mailbox only or on all accessible mailboxes – these search settings are configured under **Manage Settings / Profile / Settings**.

IMPORTANT NOTE: Besides the standard search you may have a fulltext search activated. The **Fulltext** search is an advanced search feature. In addition to basic search (searching in subject, recipient, file name, folder etc.), fulltext searches for the given expression also in the email body, attachments and file content.

The fulltext is active for the Archive Manager for Files or Archive Manager for Exchange archive only when:

➢ **Archive Manager Search** feature was installed during the product installation

➢ respective post processing plugin was configured in the Archive Manager Configuration Tool \ Post Processing \ Post Processing Scopes \ Archive server for Exchange/Files.
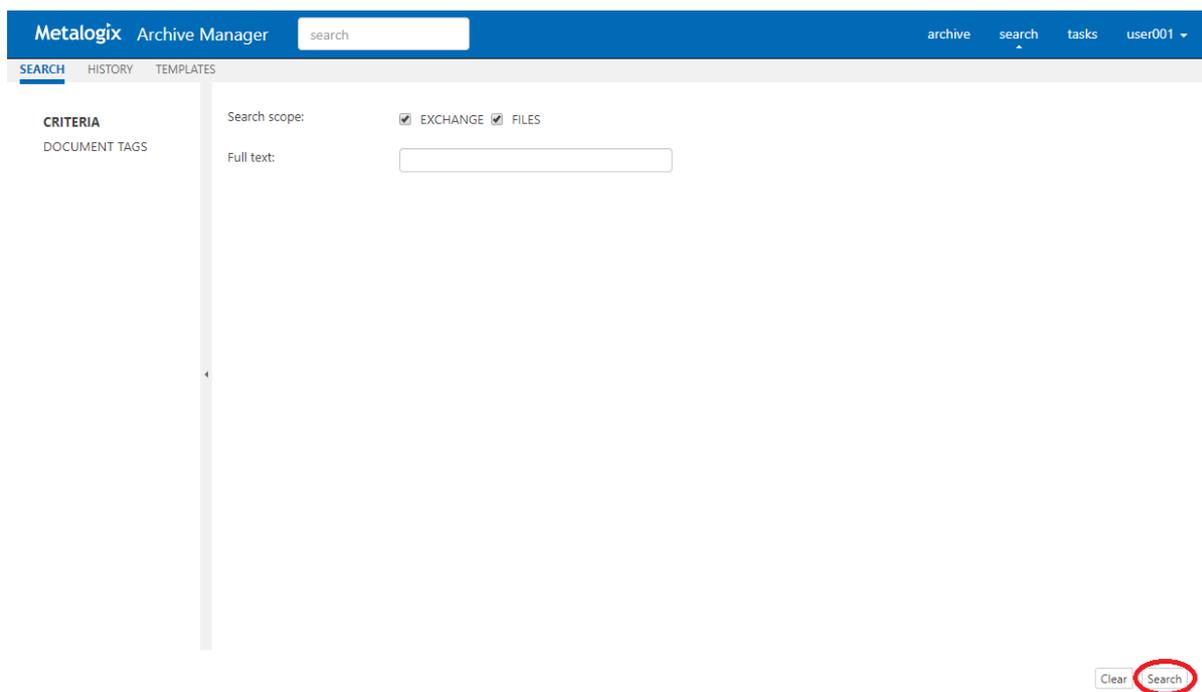
To start fulltext searching, enter the desired word, phrase, or combination of words with logical operators (AND, OR) or word with patterns into the **Fulltext** text box. The search is performed in Archive Manager for Files archive and in logged on user's archive OR in all accessible mailboxes (based on settings defined under "Manage Settings / Profile").

On the **Document tags** tab (to be selected in the left pane) you can set search criteria regarding the tags. By checking the respective check box, select which tag category should be searched through. Further, if you click **Mark with all tags** radio button, the search result will contain only emails and documents which are tagged with ALL selected tags. If you click **Mark with any tag** radio button, the search result will contain emails and documents tagged with any of the selected tags.

Finally click **Search** in the bottom right corner of the window.

The search results are displayed on two tabs:

- Exchange Search Results

- Files Search Results

The search results list views offers the same functionality as Exchange/Files list views – sorting, grouping, filtering by filter/by tabs, preview and comments. Under the **More actions** link (MENU) find the same actions as available (and described) on the main Exchange/Files tabs.

NOTE: The search results can be SAVED under the **History** tab.

Files Search

Under the Search node you can search in archived files (if only FILES checkbox has been checked on the Criteria page) with search criteria specific for file archive. To start the search, click on the Search option on the main bar. Search criteria can be defined on three tabs clickable from the left navigation pane:

- Criteria

- Servers

- Document tags

Servers

Click **Servers** in the left pane to select which servers you want to search through. At least one server MUST be checked to enable searching. The specified selection is preserved also after log-off (unless the option "Remember last mailbox / server selection" in Manage settings /Profile is not switched off).

Specify your search criteria further:

Criteria

Enter the desired word, phrase, or combination of words with logical operators (AND, OR) or word with patterns into the **Full text** text box.

i | **NOTE:** NOTE: The full text search is enabled only if Archive Manager Search is installed and the post processing plugin was configured.

The **Full text** text box also supports wildcard search as described in the table below:

Wildcard	Description	Example	SQL representation
*	A substitute for zero or more characters	*.htm	LIKE '%.htm'
?	A substitute for a single character to match	Clas?ic film.mpg	LIKE 'Clas_ic film.mpg'

The **Include** section:
- If **Search in active documents** is selected, search is performed in regular archived files.
- If **Search in documents marked for deletion** is selected, items marked for deletion in the archive will be searched.
- If **Search in versions. The match will be shown for each version separately** is selected, all versions of the item will be searched.

Documents tags

Under the **Document tags** tab you can specify which category of tagged documents should be searched through. If you click **Marked with all tags** radio button, the search result will contain only documents which are tagged with ALL selected tags. If you click **Marked with any tags** radio button, the search result will contain documents tagged with any of the selected tags.

Finally click **Search**. Search results will be displayed in the main pane.

The search results list views offers the same functionality as Files list views – sorting, grouping, filtering by filter/by tabs, preview and comments. Under the **More actions** link (MENU) find the same actions as available (and described) on the main Files tabs.

For more information on saving, exporting etc. search results, see the „*History*" and „*Template*" sections.

Search Results

Found search results get displayed in the main pane. For *Common search* both **Exchange Search Results** and **Files Search Results** are displayed on separate tabs (see the screenshot below). The list of results features the same functionality as any other list view in ArchiveWeb.

All operations over search results are asynchronous. By invoking any search operation it will be listed in TASKS and performed asynchronously.

When full text search is used, keywords in the search results can be highlighted (this function is available only for Exchange search).

ℹ️ | **NOTE:** The **Hit highlight** check box must be selected in the **Manage settings / Profile** window, and a color can be chosen from the **Hit highlight color** field. Journal items can also be highlighted by specifying a color from the **Journal highlight color** picker.

Edit query - redirects you to the previous search page where you can perform a new search after editing the existing query.
List view contains the following special columns:
- o Folder – specifies item's location (for Exchange search results it is mailbox folder name, for Files search results it is directory path)

List columns can be managed (show/hide) in the *Columns* section of the user profile (click **<UserName>** / **Manage settings** / **Profile**).

i **NOTE:** For Archive Manager for Files hits can be displayed also for non-supported files such as MS Office documents and HTML. For more details see the "List view conventions" section.

Search History

Every search performed in ArchiveWeb is logged under the **History** node with both the search criteria and search results. It allows you to view or save the search results. The save function transfers the results to Templates – for more info see the "*Templates*" section below.

NOTE: The Search History lists last 10 search results by default. To change this number you have to modify the PamSearch.exe.config file located on MAMSearch folder (for example: C:\Program Files\Metalogix\MAMSearch). For more information see the "Extending Search History" section.
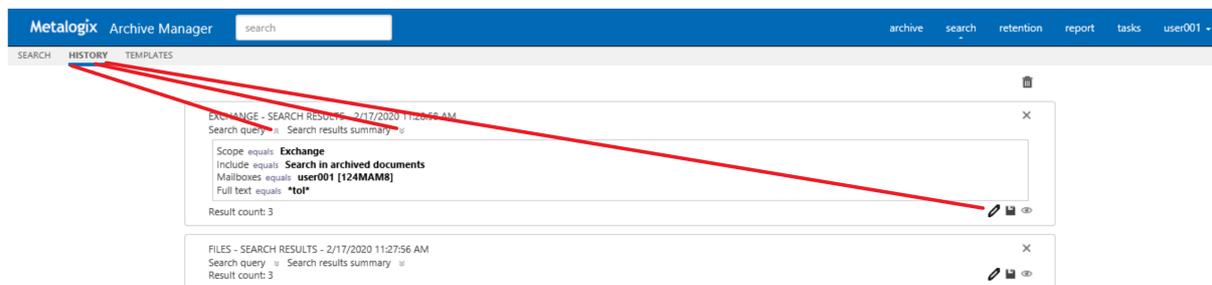
After clicking the History node individual search logs are listed. The title of the log indicates if the search was performed over Exchange archive, Files archive or both. To view the details about the search criteria/results for the given search, click the double arrow (⌄) next to the *Search query* or *Search results summary*. The number of found items is also displayed.

Icons on the right side of each search log allows you to:

- **delete** (✕) the log and associated search results as well
- **edit query** (✎) redirects you to the previous search page where you can perform a new search after editing existing query
- **view** (👁) the search results – exactly as if you have performed the given search query; you can then work with the results as usual (see the *Exchange Search* and *Files Search* sections)
- **save** (💾) the search results under Templates; enter the template name in the pop-up dialog and click **Save**.
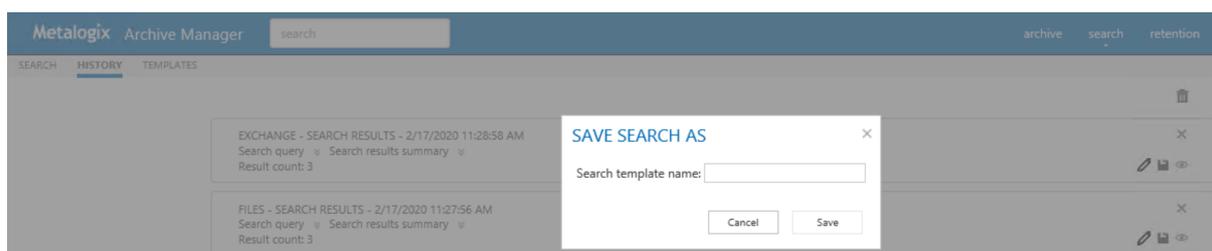
Extending Search History

The Search History lists last 10 search results by default. To change this number you have to modify the **PamSearch.exe.config** file located on MAMSearch folder (for example: *C:\Program Files\Metalogix\MAMSearch*).

There's a hidden key "**maxcount**" that can be set in PamSearch.exe.config to control the number of search history items. Value for this key can be any number in range between 1 and 2147483647. *NOTE:* When this key is missing from PamSearch.exe.config, the default value 10 is used.

To be able to set value for "**maxcount**" key the PamSearch.exe.config has to be modified by:

- adding new section name (if it does not exist) into <configSections> as follows:

```
<section name="SearchHistory"
type="System.Configuration.NameValueFileSectionHandler,System,
Version=1.0.3300.0, Culture=neutral,
PublicKeyToken=b77a5c561934e089" />
```

- creating new "SearchHistory" section (if it does not exist) as follows:

```
<SearchHistory>
        <add key="maxcount" value="2" />
</SearchHistory>
```

The value="2" indicates that 2 search history entries will be displayed

Please note that after changing the PamSearch.exe.config file you have to restart the *MAMSearch service* to affect the changes.

Example of PamSearch.exe.config

```
<?xml version="1.0" encoding="utf-8"?>
<configuration>
  <configSections>
     .
     .
     .
    <section name="SearchHistory"
type="System.Configuration.NameValueFileSectionHandler,System,
Version=1.0.3300.0, Culture=neutral,
PublicKeyToken=b77a5c561934e089" />
  </configSections>
  <SearchHistory>
```

```
        <add key="maxcount" value="2" />
    </SearchHistory>
        .
        .
        .
</configuration>
```

Search History Clean Up

Search History cache (default path: "C:\Program Files (x86) \ Metalogix \ MAMSearch \ SearchCache \ <userSID>\") is periodically cleaned from old entries.

There is a hidden key "**timelimit**" that can be set in **PamSearch.exe.config** to manage the cleaning process. Its value defines the maximum time for which the search results (*.sqlite files) are stored in SearchCache folder. All older search results are removed from the disk.

Value for this key can be any valid TimeSpan string.

NOTE: When this key is missing from PamSearch.exe.config, the default value 1 day is used, which means history entries older than 1 day will be deleted.

To change this value you have to modify the PamSearch.exe.config file located on MAMSearch folder (default path: "c:\Program Files (x86)\Metalogix\MAMSearch\PAMSearch.exe.config").

To be able to set value for "**timelimit**" key the PamSearch.exe.config has to be modified by:

- adding a new section name (if it does not exist) into <configSections> as follows:
```
<section name="SearchHistory"
type="System.Configuration.NameValueFileSectionHandler,System,
Version=1.0.3300.0, Culture=neutral,
PublicKeyToken=b77a5c561934e089" />
```

- creating a new "SearchHistory" section (if it does not exist) as follows:
```
<SearchHistory>

        <add key="timelimit" value="365.23:59:59" />

</SearchHistory>
```

The value="365.23:59:59" indicates that the search history entries will be stored for 365 days, 23 hours, 59 minutes and 59 seconds.

Please note that after changing the PamSearch.exe.config file you have to restart the MAMSearch service to affect the changes.

Example of PamSearch.exe.config

```xml
<?xml version="1.0" encoding="utf-8"?>
<configuration>
  <configSections>
     .
     .
     .
    <section name="SearchHistory"
type="System.Configuration.NameValueFileSectionHandler,System,
Version=1.0.3300.0, Culture=neutral,
PublicKeyToken=b77a5c561934e089" />
  </configSections>
  <SearchHistory>
    <add key="timelimit" value="365.23:59:59" />
  </SearchHistory>
     .
     .
     .
</configuration>
```

Search Templates

When you expand the **Search / Templates** node, you may see a list of search templates that have been saved so far (search results can be saved from **History** tab as described in the "*History*" section).
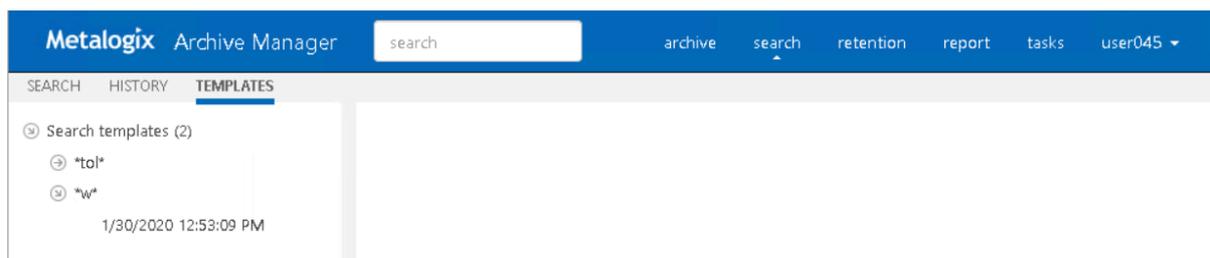
Click on the arrow next to the template to expand the template node. Under this node you will see the link to respective search results - with the date and time when they were saved.

Clicking the search results link will display the search results in the main pane. Here you can benefit from the filtering functionality as in all ArchiveWeb lists – grouping, filtering by status (tagged, locked etc.) and creating custom filters.
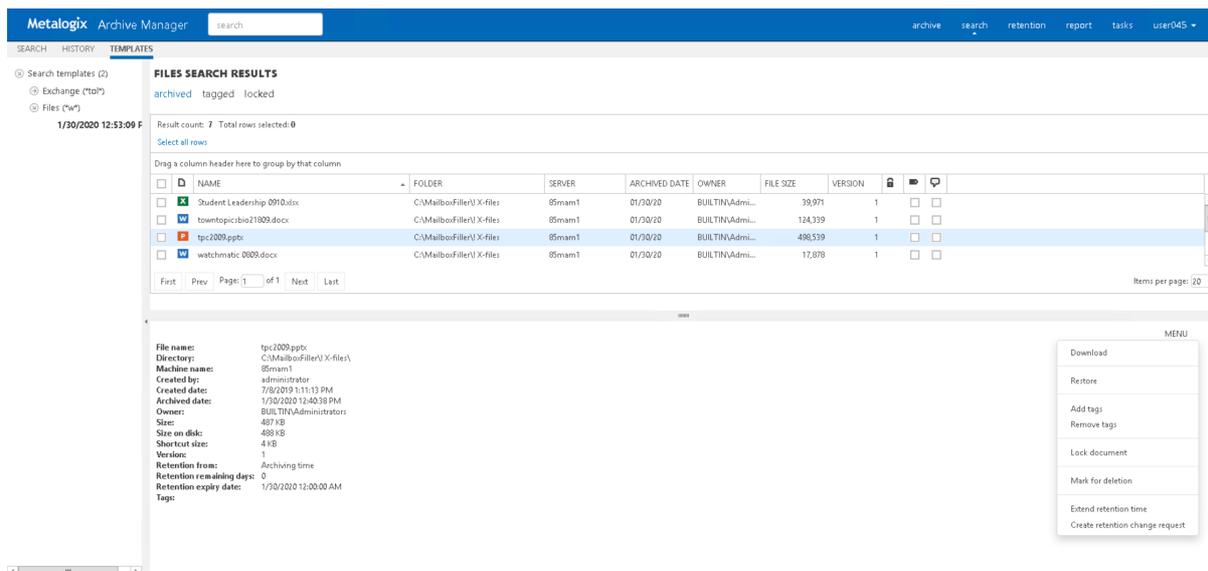
The MENU link in the top right corner of the item detail pane offers additional actions for the selected item:

- **Download** – download the selected item.

- **Restore** – restore the selected archived item to original item.

- **Add tags** or **Remove tags** – add or remove a tag for selected item.

- **Lock/Unlock document** – lock or unlock selected item.

- **Mark for deletion** – mark the selected item for deletion based on the retention category in use.

- **Extend retention time** – increase the time for which the item cannot be deleted from the archive. Setting shorter retention than the actual retention is not supported. After the specified period (in months) the item can be deleted manually or by a *Delete job* if such is scheduled in respective Enterprise Manager.

- **Create retention change request** – send a request to the approving person for selected item deletion or increased retention time when it can't be deleted from the archive. The *Approver* who is the person with adequate permission in Archive Manager, will receive the request through email notification if Archive Manager SMTP is properly configured.

Templates handling

When you click on any template name under the **Templates** node, ArchiveWeb redirects you to the given search criteria page. It can be either Exchange, Files or Common search depending on the template. All search criteria are configured by the template. You can click **Search** to perform the same search with the search settings specified in this template.

On the screenshot below you can see how the template is displayed once you click its name under the **Templates** node. The main pane presents the usual Exchange/Files/Common search window. The only difference is the bottom part of the windows. There you see the template metadata (name, user, date of creation etc.) and action buttons:

· **Search** – runs search query

· **Delete** – deletes the template completely from the Templates node
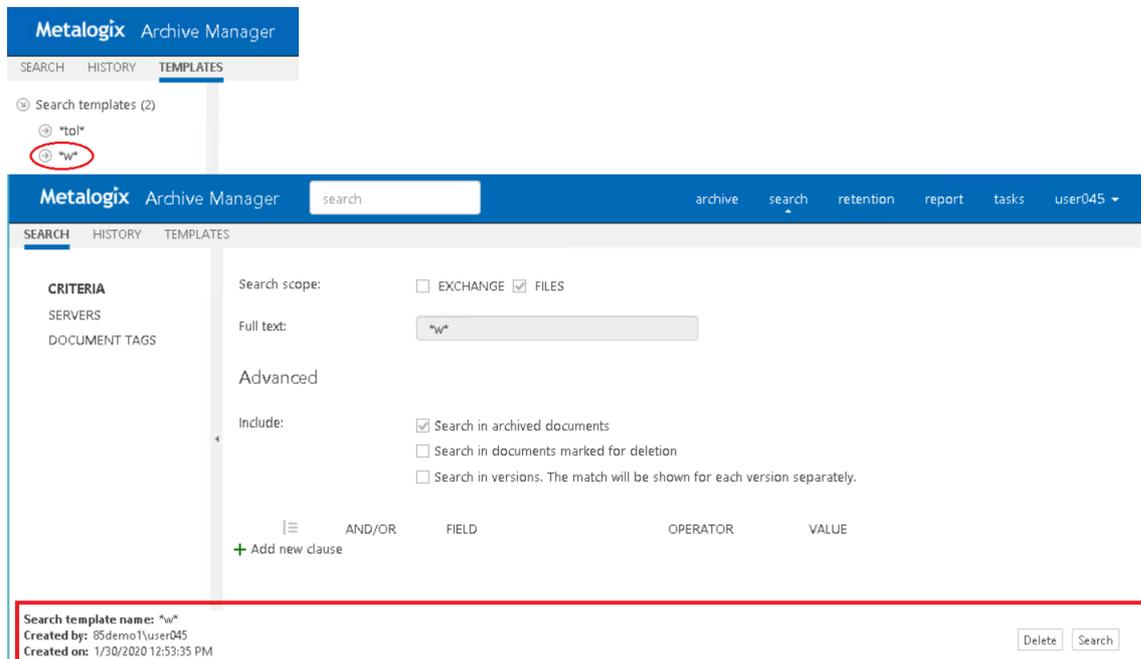
Report

With Report functionality at hand, users have overview of their email and/or file archives. Clear concise information in terms of how many items were archived, when, what is their size – original or shortcutted etc. Files features also information on retrieved items.

Report section consists of two tabs - **Statistics** tab with information on archived emails/items and **Audit** tab with logs of user actions.

Please note that full access to this functionality must be granted to the user under Permissions (see the Roles & Permissions section).

Statistics

This tab was designed to give the administrator fast, reliable and comprehensive information about archived emails/files. The number of emails/files, their size as well as space saved on the disc at archiving – all these essential data can be sorted by folder, user or time period. Exporting the statistics is also possible.

Statistics are available for:
- ☐ Exchange Archive
- ☐ Files Archive

NOTE: Not all **Statistics** functions may be available for the logged-on user. The user must be granted the necessary permissions. For more information see the **Roles** and **Permissions** sections.

Exchange Archive statistics

To generate the Archive Manager for Exchange statistics click on the **Report** from the main menu bar. Then form the grey sub-bar click **Statistics** and unfold the **Exchange Archive** node. Then select whether you want to display statistics for:

- **Archived messages** (count of messages) or

- **Archived size** (size of original message; shortcut size etc.)

NOTE: DATE RANGE SELECTION IS ALSO POSSIBLE (TO IMPROVE PERFORMANCE). The statistics can be generated also in Archive Manager for Exchange Enterprise Manager.

Files Archive statistics

To generate the Archive Manager for Files statistics click on the **Report** from the main menu bar. Then form the gray sub-bar click **Statistics** and unfold the **Files Archive** node. Then select whether you want to display statistics for:

- **Archived** (details on archived files) or

- **Restored** (detailed on restored files)

- **Archived versions** (details on files with versions in the archive)

- **Retention** (details on files whose retention ends at the listed date) - a new column "Retention remaining days" and pagination have been added

NOTE: The statistics can be generated also in Archive Manager for Files Enterprise Manager.

Statistics table functions are similar to ArchiveWeb table functions:

➢ Change the column sorting order by selecting the given column header and clicking its down/up arrow on the right (in case the arrow is not visible adjust the width of the column by dragging the line)

➢ Group table data by any column. To do so, drag the column header to the bar right above the table. Generated groups can be expanded by clicking the arrows next to them. As usual, the sorting order can be changed by clicking the little arrow in the dragged column header.

> ➢ Create filters as described in "*Filter Builder*" section

To export the data, click **Export** at the top-right of the table. The *Export* menu opens and you can choose to export the statistics to Excel, CSV, PDF or RTF.

Audit tab

This tab is accessible if:
- Auditing is configured (see the "Auditing" manual) and
- logged-on user has Auditing permissions enabled

Auditing feature allows administrator (or other users defined in web config) to log defined user actions in the email archive, i.e. the administrator has an overview of archived / restored / retrieved emails and performed fulltext searches. Even all actions made in Enterprise Manager console (both for Archive Manager for Exchange and for Files) are logged.

To view the logs, from the main pane click **Report**, then **Audit** from the grey sub-bar. Then unfold the **Email Archive** node to access the Archive Manager for Exchange logs or **Archive Manager for Files** node to access the Archive Manager for Files logs. Then you can browse through different types of logs – archive actions (Archive node), retrieve actions (Retrieve node) etc.

NOTE: Not all **Audit** tab functions may be available for the logged-on user. The functions must be allowed for the user. For more information see the **Roles** and **Permissions** sections.

The log entries of the selected action are displayed in the main pane. Data of the log entry selected in the main pane are displayed below the list view (see the screenshot above).

Audit Search

Special settings are available for **Email Archive/ Search** logs. Every search action is logged in the auditing log. By default user sees only its own search result logs displayed. To make all users' search logs available for the user, s/he must have "Access all mailboxes" permission allowed for Auditing (under **<LoggedOnUser>/ Manage Settings/ Roles**).

To check your auditing search:

1. Perform search

2. Preview and export the search result by permission

3. Disable the "Delete" functionality for user (under <Logged on user> / Manage settings / Roles)
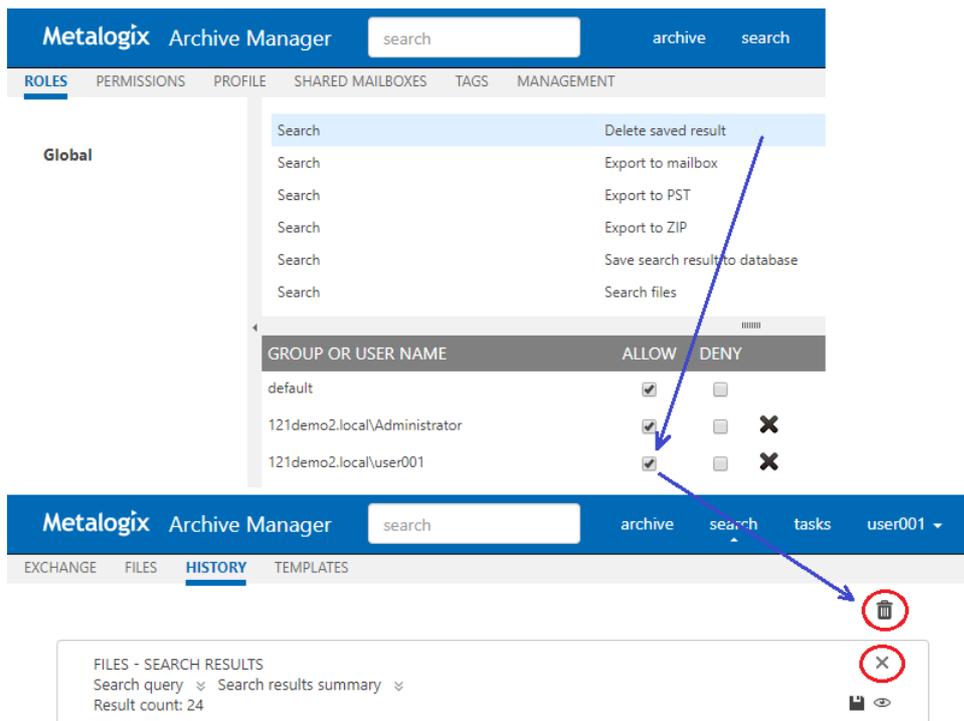
List view conventions

List view functions are the same as in other ArchiveWeb lists:

➢ Change the column sorting order by selecting the given column header and clicking its down/up arrow on the right (in case the arrow is not visible adjust the width of the column by dragging the line)

➢ Group table data by any column. To do so, drag the column header to the bar right above the table. Generated groups can be expanded by clicking the arrows next to them. As usual, the sorting order can be changed by clicking the little arrow in the dragged column header.

➢ Create filters as described in "*Filter Builder*" section.

Any audit entry can be downloaded or tags can be added or removed from it. All tasks are available through the **More actions** menu. Click the **More actions** menu button located on the bottom right just below the list view. Then you can e.g:

- **Add tags** or **Remove tags** : these options allow you to add or remove tags from selected items (for more information on tags see the "Tagged items tab" section)

- **Export results to ZIP** (only for ArchiveWeb/Archive Manager for Exchange/Search or ArchiveWeb/Archive Manager for Files/Search entries); this option will export search result items with summary to Excel file and allow to download the created ZIP to the user's local machine.

  i | **NOTE:** This function is only available if the user has "Export results to ZIP" role allowed for Audit (under **<LoggedOnUser>/ Manage Settings/ Roles**).

- **Export to XLS**: this option will export selected items to XLS file on the user's local machine and provide a download link to the same file.

NOTE: When downloading large amount of items it is reasonable to split the data in more XLS files. To do this value for the key "ItemsPerXLS" needs to be changed in ArchiveWeb's web.config file.The default value is "500000" and represents number of rows for single XLS file during the export. In order to set correct value for the key please refer to Excel limits on the page https://support.office.com/en-us/article/excel-specifications-and-limits-1672b34d-7043-467e-8e27-269d656771c3.

- **Download log entry**: this option will download single log entry in log file format on user local machine.

When two or more items are checked, the **More actions** menu appears automatically under the list view.

For more information on Auditing (how to install, configure it etc.) see the "Auditing" manual.

Tasks

Tasks option in the blue navigation ribbon at the top of the page gives the user overview of asynchronous tasks created by the logged-on user.

Tasks in the list are ordered. Running task is at the very top of the list. Then waiting tasks follow (in the order in which they will be performed, i.e. in the order in which they were created). Finally, completed and failed tasks are listed with the most recently completed task listed as first.

The list contains the following columns:

STATUS - task status can be one of the following:
> Waiting - task is waiting in the queue to be run
> Running - task is running
> Completed - task successfully completed
> Failed - task completed with errors

TASK - task's name including version name and operation name e.g. [AUDIT] - EXPORT TO XLS means that the logs from the Auditing will be exported to .xls file

START - start date when the task was started

FINISH - task's finished date

TOTAL COUNT - number of items to be processed by the task

PROGRESS - displays the progress or operation result; For export tasks such as Export to XLS, Export to PST and Export to ZIP this column displays a counter (how many items are already processed). For other operation types this column is empty. When task has finished, this column can contain download link (link to download processed items or link to download error logs.

"**trash-bin**" icon – deletes all the tasks from the list - confirmation dialog should appear with "Don't show this dialog again" check-box. If user confirms the action not to see again the dialog next tasks will be deleted and no dialog displayed for confirming the action, it is valid for current session and it's invalidated after re-login to AW and dialog will be displayed again.

"**X**" icon - deletes task from the list

Refresh button - reloading the task list; the list is automatically refreshed at specified interval (Profile / Automatic refresh interval)

NOTE: Export tasks such as "Export to ZIP" or "Export to PST" can be very resource consuming and can cause some issues, especially time-outs. To minimize these problems, see the Export Tasks IIS Settings Suggestions.

Addendum

- [Troubleshooting](#)

- [List of Default ArchiveWeb Permissions](#)

Export Tasks IIS Settings Suggestions

Export tasks such as "Export to ZIP" or "Export to PST" can be very resource consuming and can cause some issues, especially time-outs. To minimize these problems, try configuring the following settings:

Process Model - Idle Time-Out

Modify the Idle Time-Out setting for *AWAppPool7*, *FilePAMAppPool* and/or *EPAMAppPool4* application pools in the IIS.

For example: Go to IIS -> Server Name -> Application Pools -> AWAppPool7 and click **Advanced settings**. Set the value to zero.
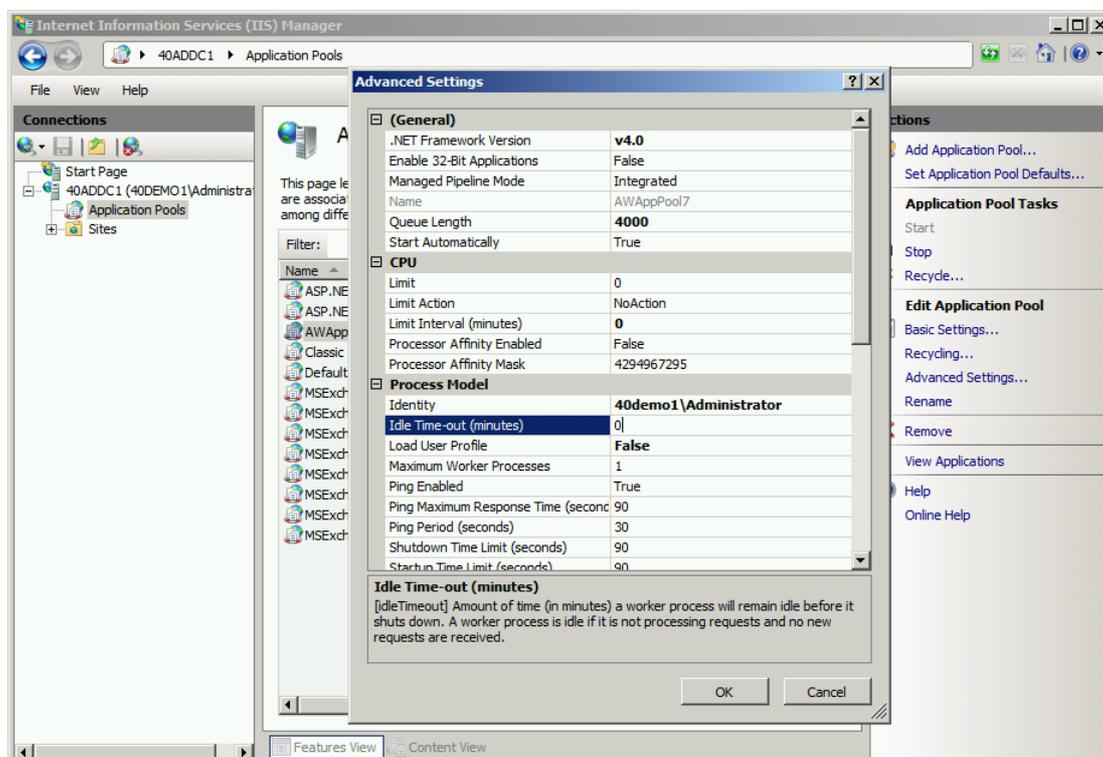
Web Sites - Session Time-Out

Export task can run several minutes or hours. When the task is running a session time-out can occur. This will cause the failure of the task operation.

To prevent this from happening, modify the **Time-out** setting for *ArchiveWeb*, *ExchangePAMWS* and/or FilePAMWebService web sites in the IIS to large enough number.

For example: Go to IIS -> Server Name -> Sites -> Default Web Site -> ArchiveWeb click on **Session State**
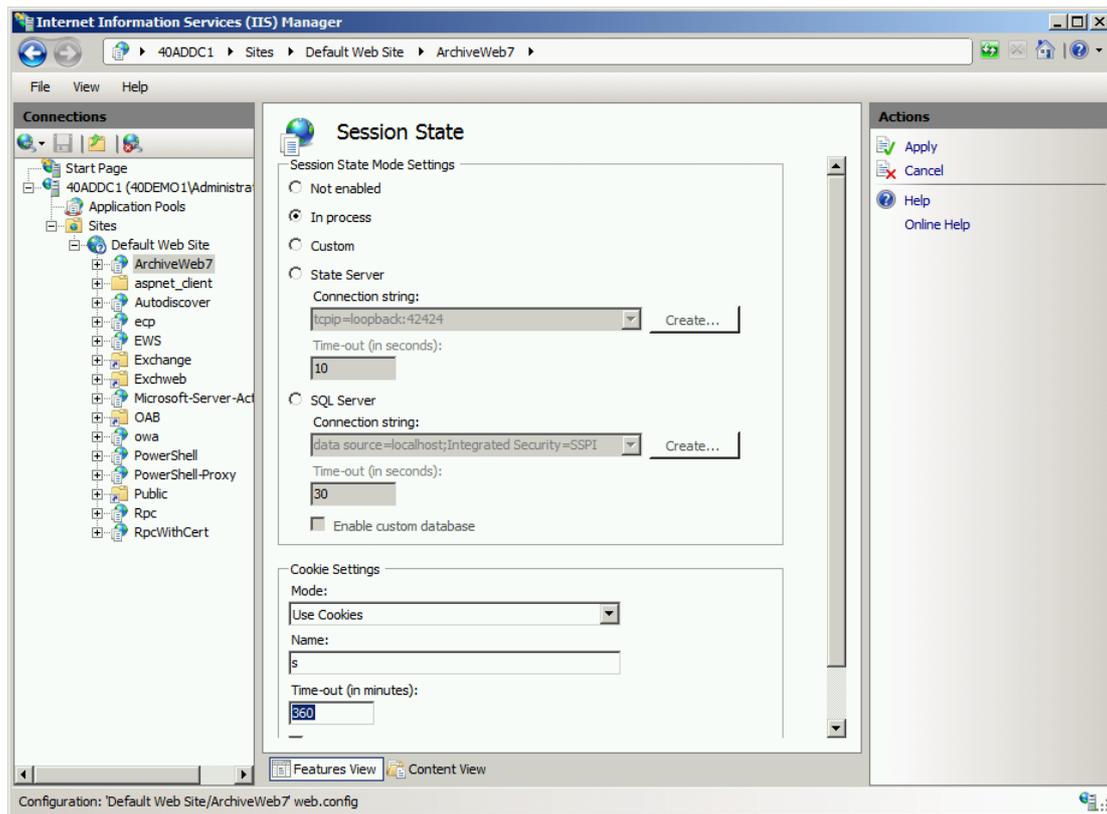
Please note: for ArchiveWeb web application – make sure the "sessionState" setting in web.config is synchronized with IIS' cookie time-out. Application session time-out will expire when the IIS' cookie time-out value is reached therefore for correct ArchiveWeb functionality the "sessionState" in web.config should be set to same or lower value.

Troubleshooting

This section offers solutions to most common problems users can encounter in relation to new ArchiveWeb.

IIS Error 403 Forbidden

When this error occurs after installing/updating the ArchiveWeb application it is necessary to run the following commands from the command line to re-register the .NET Framework:

```
c:\WINDOWS\Microsoft.NET\Framework\v4.0.30319\aspnet_regiis.exe –iru
c:\WINDOWS\Microsoft.NET\Framewrok\v4.0.30319\iisreset
```

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