Quest

Metalogix® Archive Manager for Files 8.8

Common Upgrade Guide

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Legend

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

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

Metalogix® Archive Manager for Files
Updated August 2023
Version 8.8

Contents

About this document **4**

Archive Manager for Files **5**

HSM **12**

Search **16**

About Us **20**

Contacting Quest 20

Technical Support Resources 20

1

About this document

This document describes the steps to upgrade Archive Manager for Files and its components for a single server environment. For multi-server deployments or other cases that require special upgrades from versions older than 8.2, please contact Quest Technical Support Resources.

Steps to download the install media

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

   or

   navigate to the http://www.quest.com/trials page. Locate the product Metalogix Archive Manager for Exchange.

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

2

Archive Manager for Files

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

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

Archive Manager for Files can be upgraded in one of two ways:

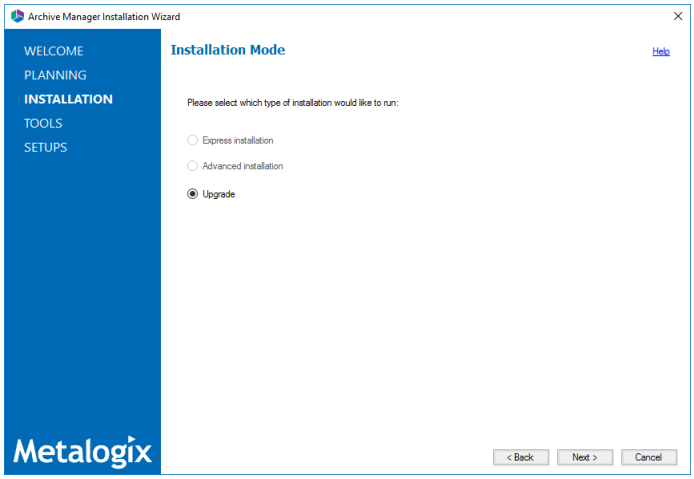
- automatically, with the Archive Manager installer. This method automatically upgrades Archive Manager for Files on the same server where it was previously installed.
- manually, using the *Archive Manager for Files Setup.exe* file. This method manually upgrades Archive Manager for Files on the same server where it was previously installed.

In this chapter:

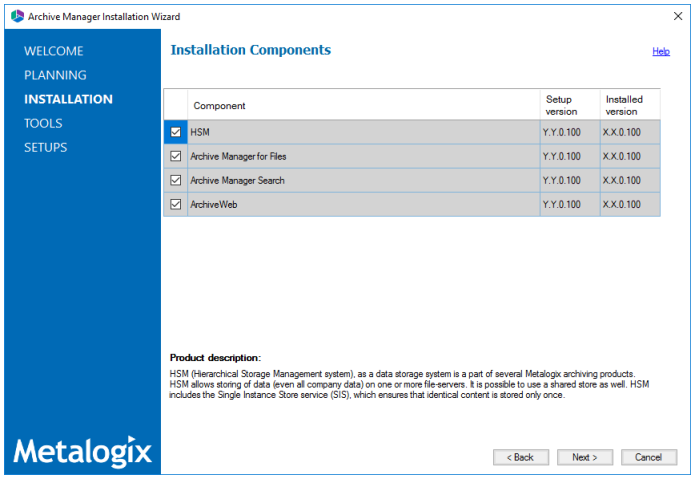
- Steps to automatically upgrade with the Archive Manager installer
- Steps to manually upgrade with the Archive Manager for Files installer
- Steps to manually upgrade the Archive Manager for Files database

Steps to automatically upgrade with the Archive Manager installer

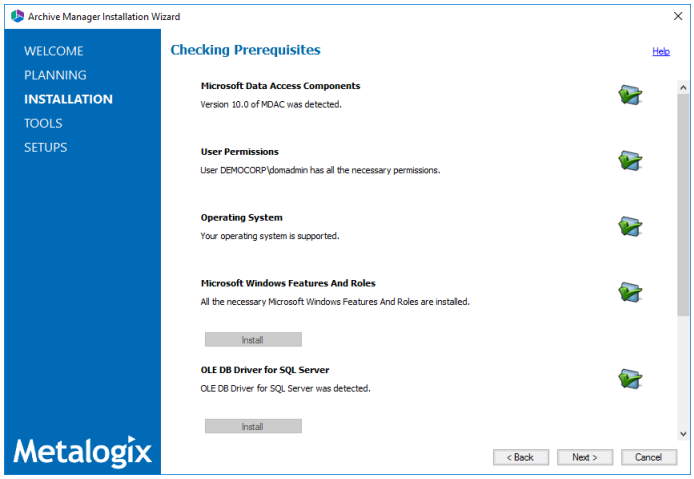
1. Download the latest Metalogix Archive Manager for Files install media. For instructions see Steps to download the install media.
2. Run the **Metalogix Archive Manager Installation Package**.
3. The wizard checks whether the Metalogix Archive Manager for Files installation requires an upgrade. If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



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

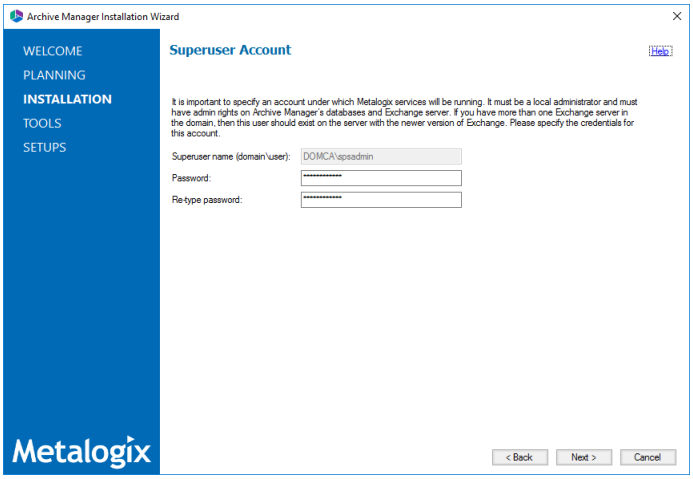


5. Click **Next.** The **Checking Prerequisites** page appears. A check is conducted to find out if a new prerequisite is needed for the upgrade.

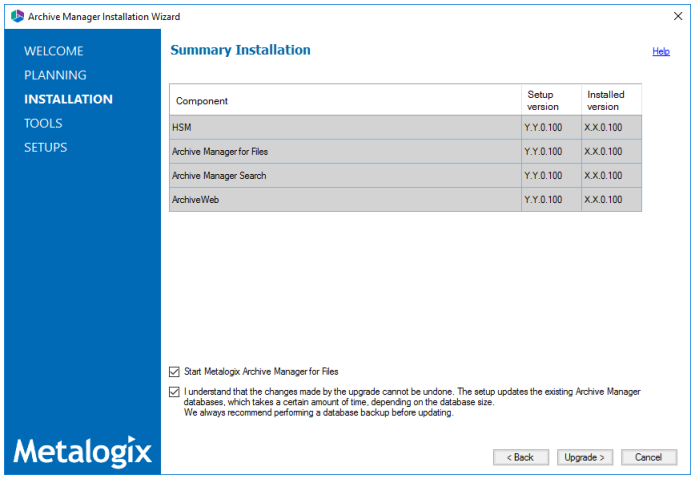


6. Click **Next.** The **Superuser Account** page appears. Specify and confirm the password.

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



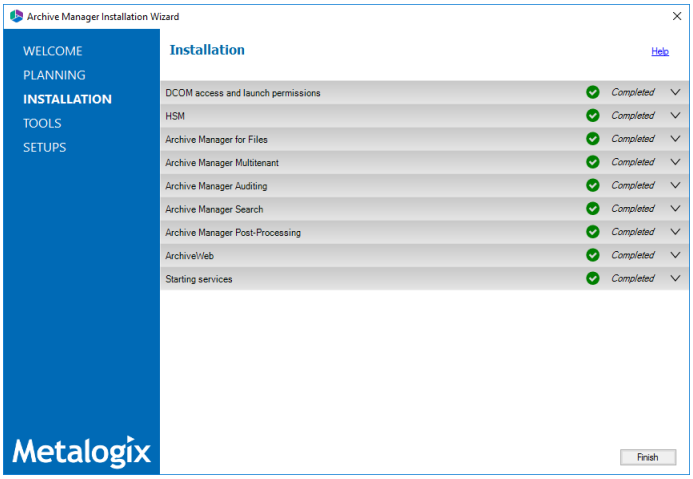
7. Click **Next.** The **Summary Installation** page appears. This page presents information about component versions that will be installed after the update (**Setup version** column), and versions that are currently installed (**Installed version** column).



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

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

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

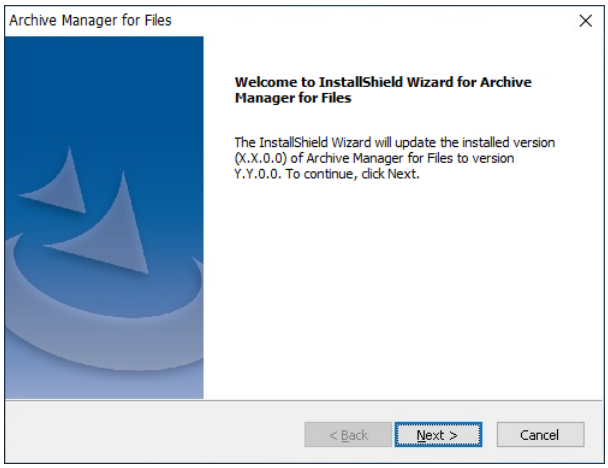


9. Click **Finish** to close the wizard when all the components are upgraded.

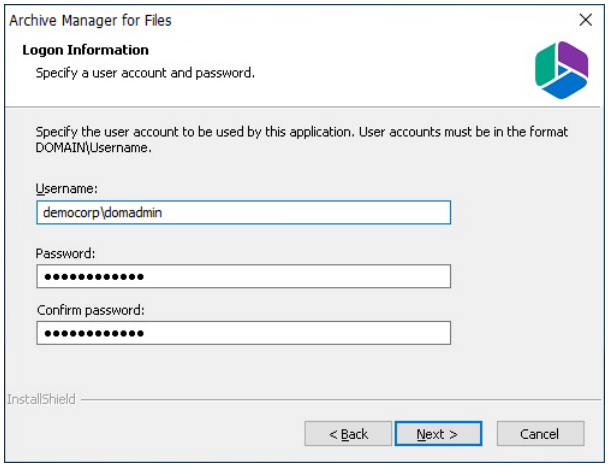
Steps to manually upgrade with the Archive Manager for Files installer

1. Run the Archive Manager Search installer. the default location is `C:\Archive Manager Installation Package\Archive Manager Search\Archive Manager for Files Setup.exe`. The *Welcome* window opens.

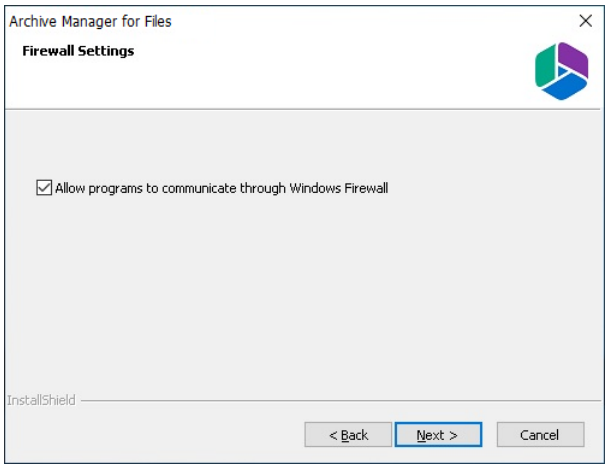
> **NOTE**: A prerequisite check occurs and missing requirements if any are displayed. Install the prerequisites.



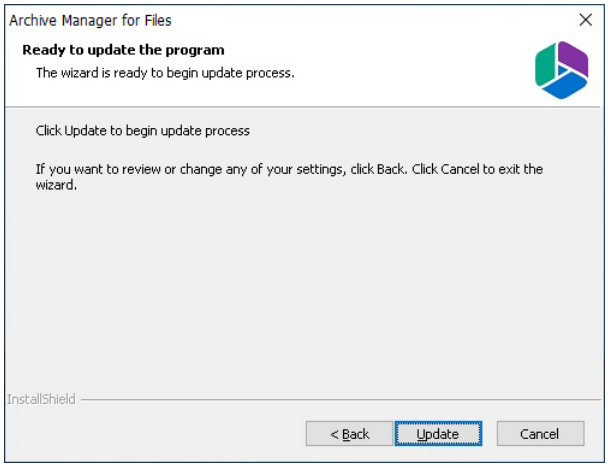
2. Click **Next**. The *Logon Information* window opens.



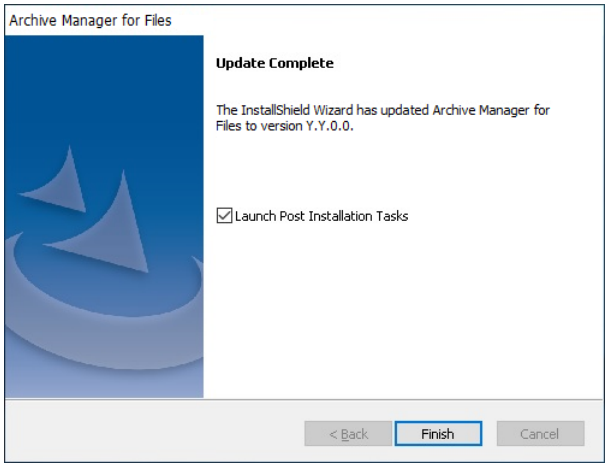
3. Click **Next**. The *Firewall Settings* window opens. Select the check box to allow communications through server firewalls. By default, the **Allow programs to communicate through Windows Firewall** is checked. This will allow critical services to communicate with the Archive Manager for Files service. If you clear the check box, critical services may not be able to communicate through the firewall.



4. Click **Next**. The *Ready to modify the program* window opens.



5. Click **Update** to upgrade Search. If you want to review or change the wizard settings, click the **Back** button. To exit the wizard click **Cancel**. When the upgrade completes the *Update Complete* window opens.



6. Select **Launch Post Installation Tasks** to open the *Archive Manager Configuration Tool* to manually upgrade the Archive Manager for Files database. Click **Finish**.

Steps to manually upgrade the Archive Manager for Files database

If you choose this manual process and database scripts are upgraded, you must run the scripts manually from the *Archive Manager Configuration Tool* for three components: **Files Archive**, **Auditing** and **Users**.

For Files Archive

1. From the feature panel on the left in the *Archive Manager Configuration Tool*, click **Files Archive** and select the **Database** tab.
2. Verify that the database connection information is as expected. Then click **Run Scripts**. The *Run Scripts* selection window opens.
3. Click **Select All** to select all check boxes. Click **Next**. The *View SQL scripts* window opens.
4. Click **Next**. The *Run Scripts* authentication window opens. Enter the information as described below:

   a. Authentication - authentication type used for the database. Choose either **Windows authentication** or **SQL Server authentication**

   a. **Database user** - database login username if *SQL Server authentication* is the selected as the authentication mode.

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

   c. (optional) Check the **I want to review the SQL Scripts** check box to view the scripts.

5. Click **Next**. If you chose to view the SQL scripts then the *View SQL scripts* window opens. If you chose to view the Oracle scripts then the *View Oracle scripts* window opens

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

6. Click **Next**. The *Run SQL scripts* window reopens with the scripts you have chosen to run.
7. Click **Next**. When the status changes to *Scripts were run successfully*, click **Finish** to close the script installer. The *Scripts* section of the **Database** tab displays the status and updated version of the scripts.

For Auditing

1. From the feature panel on the left in the *Archive Manager Configuration Tool*, click **Auditing** and select the **Database** tab.
2. Repeat steps 2 to 7 as described above.

For Users

1. From the feature panel on the left in the *Archive Manager Configuration Tool*, click **Users** and select the **Database** tab.
2. Repeat steps 2 to 7 as described in the previous section.

3

HSM

You can automatically upgrade HSM with the Archive Manager installer. If you need to manually upgrade HSM, follow the steps described below.

> **NOTE:** Upgrading HSM does not upgrade third party file storage systems used as HSM stores. Refer to the upgrade manuals for the third party file storage products.

In this chapter:

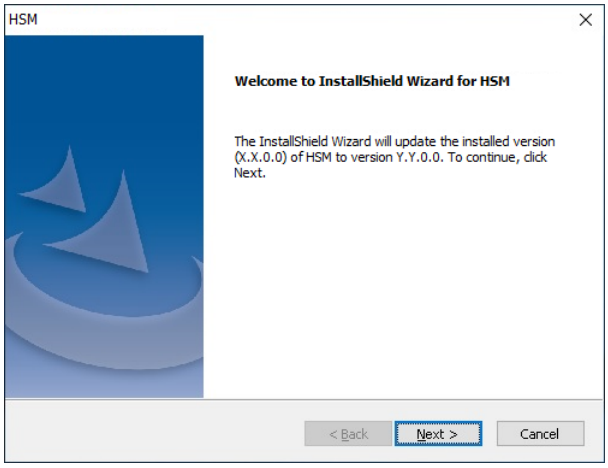
- Steps to manually upgrade with the HSM installer
- Steps to manually upgrade the HSM database

Steps to manually upgrade with the HSM installer

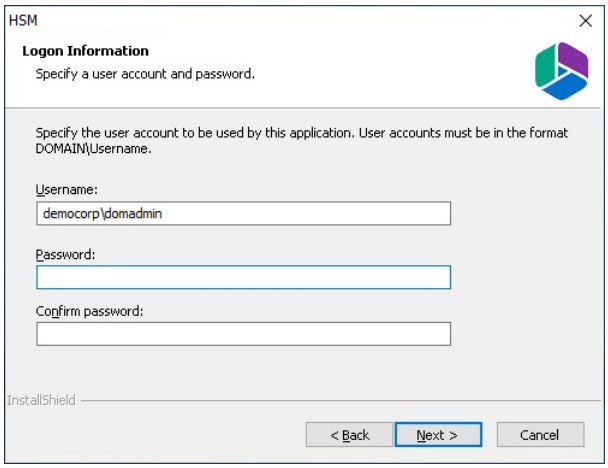
1. Log in to the HSM server with the credentials of the **superuser** (eg. **democorp\domadmin**)
2. Download the installation media. For more information see Steps to download the install media.
3. Run the **Metalogix Archive Manager Installation Package** to extract the files to a local folder.
4. Close the unified installer wizard which starts automatically.
5. Run the HSM setup from `<Media folder>\Archive Manager Installation Package\HSM\HSM Setup.exe`

   > **NOTE:** A prerequisite check occurs and missing requirements if any are displayed. Install all missing requirements before you proceed.

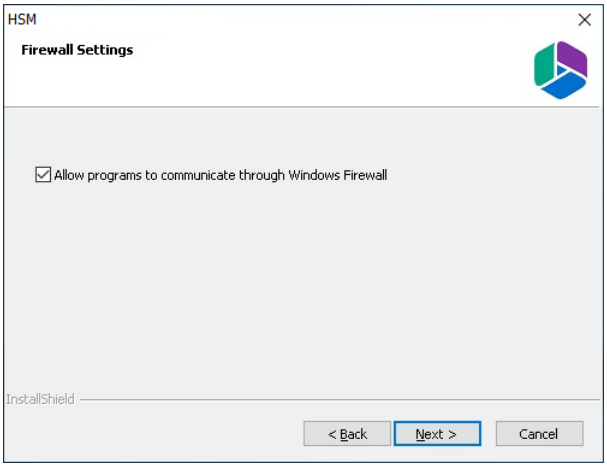
6. The *Welcome* window of the HSM installer opens.



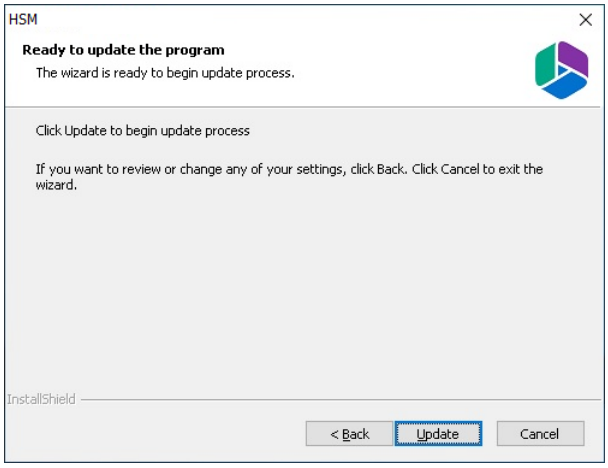
7. Click **Next**. The *Logon Information* window opens.



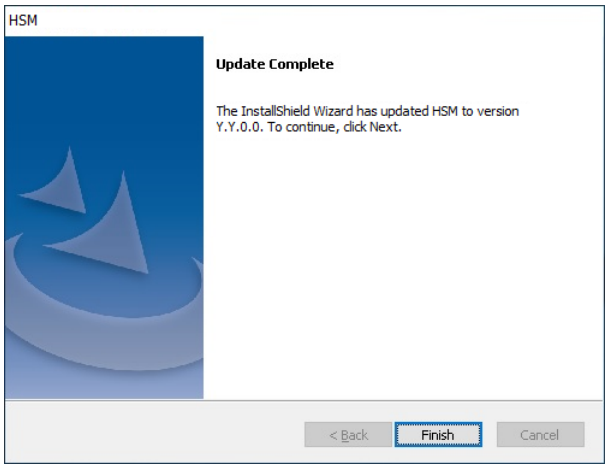
8. Click **Next**. The **Firewall Settings** window opens if the Windows Firewall is active on your computer. By default, the **Allow programs to communicate through Windows Firewall** is checked. This will allow critical services to communicate with the HSM service. If you clear the check box, critical services may not be able to communicate through the firewall.



9. Click **Next**. The *Ready to update the program* window opens.



10. Click **Update** to upgrade HSM. If you want to review or change the wizard settings, click the **Back** button. To exit the wizard click **Cancel**. When the upgrade completes the *Update Complete* window opens.



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

Steps to manually upgrade the HSM database

If you choose the manual upgrade process, you must run the scripts manually from the *Archive Manager Configuration Tool*.

1. From the feature panel on the left in the *Archive Manager Configuration Tool*, click **HSM** and select the **Database** tab.
2. Verify that the database connection information is as expected. Then click **Run Scripts**. The *Run Scripts* selection window opens.
3. Click **Select All** to select all check boxes. Click **Next**. The *View SQL scripts* window opens.
4. Click **Next**. The *Run Scripts* authentication window opens. Enter the information as described below:
    a. **Authentication** - authentication type used for the database. Choose either **Windows authentication** or **SQL Server authentication**

a. **Database user** - database login username if *SQL Server authentication* is the selected as the authentication mode.

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

c. (optional) Check the **I want to review the SQL Scripts** check box to view the scripts.

5. Click **Next**. If you chose to view the SQL scripts then the *View SQL scripts* window opens. If you chose to view the Oracle scripts then the *View Oracle scripts* window opens

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

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

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

4

Search

You can automatically upgrade search using the Archive Manager installer. If you need to manually upgrade the search or post processing services, follow the steps described below.

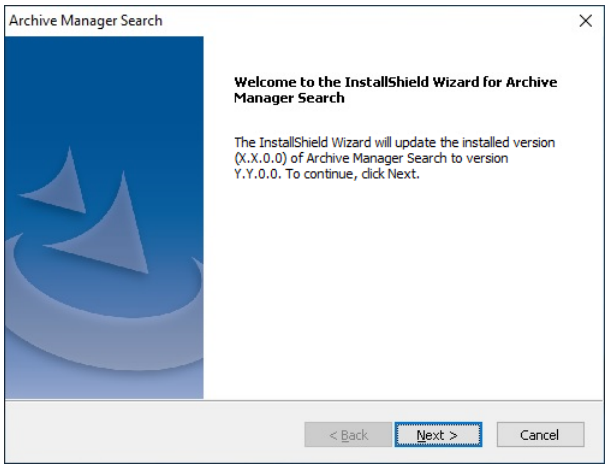
In this chapter:

- Steps to manually upgrade with the Search installer
- Steps to manually upgrade the Search database

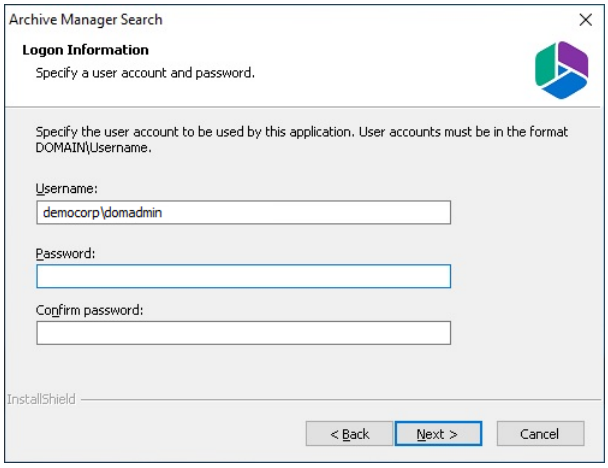
Steps to manually upgrade with the Search installer

1. Run the Archive Manager Search installer. the default location is `C:\Archive Manager Installation Package\Archive Manager Search\Archive Manager Search Setup.exe`. The *Welcome* window opens.

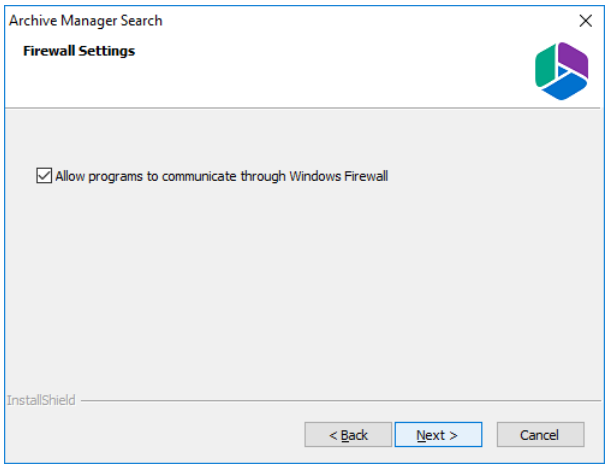
   NOTE: A prerequisite check occurs and missing requirements if any are displayed. Install the prerequisites.



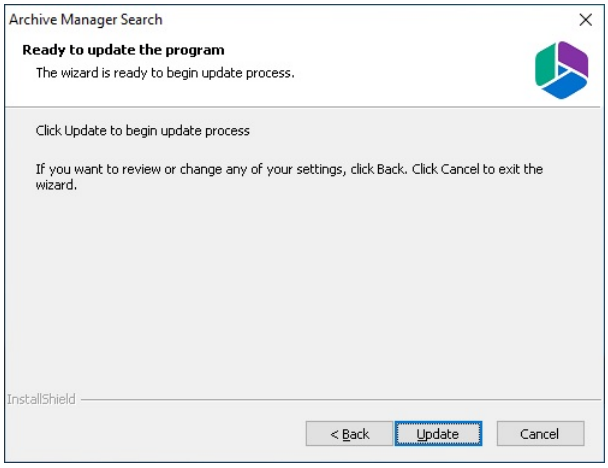
2. Click **Next**. The *Logon Information* window opens.



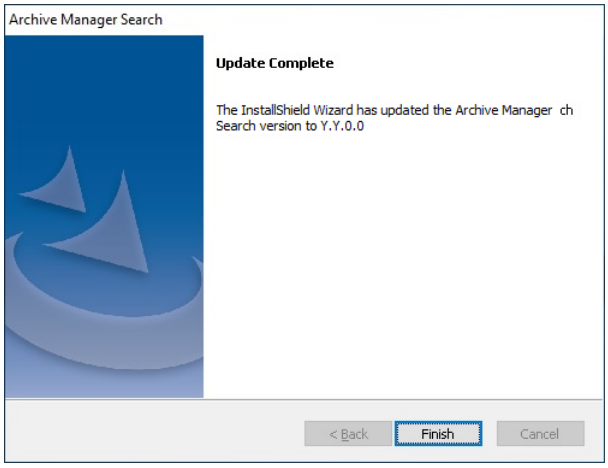
3. Click **Next**. The *Firewall Settings* window opens. Select the check box to allow communications through server firewalls. By default, the **Allow programs to communicate through Windows Firewall** is checked. This will allow critical services to communicate with the SMTP service. If you clear the check box, critical services may not be able to communicate through the firewall.



4. Click **Next**. The *Ready to modify the program* window opens.



5. Click **Update** to upgrade Search. If you want to review or change the wizard settings, click the **Back** button. To exit the wizard click **Cancel**. When the upgrade completes the *Update Complete* window opens.



6. Click **Finish**.

Steps to manually upgrade the Search database

If you choose this manual process and database scripts are upgraded, you must run the scripts manually from the *Archive Manager Configuration Tool* for two components: **Search** and **Post Processing**.

For Search

1. From the feature panel on the left in the *Archive Manager Configuration Tool*, click **Search** and select the **Database** tab.
2. Verify that the database connection information is as expected. Then click **Run Scripts**. The *Run Scripts* selection window opens.
3. Click **Select All** to select all check boxes. Click **Next**. The *View SQL scripts* window opens.
4. Click **Next**. The *Run Scripts* authentication window opens. Enter the information as described below:

   a. Authentication - authentication type used for the database. Choose either **Windows authentication** or **SQL Server authentication**

   a. **Database user** - database login username if *SQL Server authentication* is the selected as the authentication mode.

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

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

   Click **Save Script** to save the script as a script file to a folder. Check the **Word wrap** check box to display long lines as multiple lines of text.
6. Click **Next**. The *Run SQL scripts* window reopens with the scripts you have chosen to run.

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

For Post Processing

1. From the feature panel on the left in the *Archive Manager Configuration Tool*, click **Post Processing** and select the **Database** tab.
2. Repeat steps 2 to 7 as described in the previous section.

5

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