

Metalogix<sup>®</sup> Archive Manager for Files 8.7

## **Advanced Installation Guide**



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### Legend



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



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

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# Introduction

Metalogix Archive Manager for Files is a robust solution for archiving and retrieving files from cost effective file storage systems. When files are archived, they are replaced with a shortcut that saves a huge amount of space. The shortcuts ensure that archived files are available to users whenever they are needed and this solution preserves the existing structure of the file system that is used on a daily basis. Archived files can be also retrieved even if the original files are deleted including previous versions of the same file. The integrated search engine provides the ability to search through the archives by applying various search criteria.

Metalogix Archive Manager for Files uses advanced file management techniques like retention categories and file access frequency settings to enhance the file access times for end-users. As a result, you can achieve the same file access efficiencies from slower and less expensive file storage systems as you would expect from more expensive and faster file storage systems.

Metalogix Archive Manager for Files can archive files stored on remote servers as well. You can install Metalogix Archive Manager for Files on several machines. These machines can be standalone file servers or part of a cluster that uses the Hierarchical Storage Manager (HSM) server to manage file storage systems. These remote servers can be administered from a single client using the Archive Manager for Files Administration Center (AMAC).

The *primary* components of Metalogix Archive Manager for Files are as follows:

- **Archive Manager for Files** - archival solution for files that includes the application server and the administration tool.
- **Hierarchical Storage Manager (HSM)** - file storage manager that manages one or more dedicated or shared file-servers across the organization. HSM ensures that files with identical content are stored only once regardless of where their respective original file is located.
- **ArchiveWeb** - online archive interface with advanced search and reporting functionality.

## File storage and retrieval process

Archive Manager for Files transfers files to HSM which takes care of storing and retrieving the files. HSM works with a database because the information contained in the shortcut is stored either in an ORACLE, or MS SQL. The HSM system transfers this file to a specified store which compresses the file *on the fly*. A shortcut, which is only a few kilobytes in size, remains at the original file location. The shortcut includes information about the new location of the archived file and bears the same name and the same file extension as the original file (in the case of FSA [standard] shortcuts). The only difference that a user notices is that the shortcut is bears a modified icon and the name of the file is written in blue (in Explorer view).

Users work with archived files as usual. When an archived file is reopened, Archive Manager for Files passes the information from the shortcut to HSM which restores the file from the store. Users experience a seamless transition as if they are working in a normal environment.

HSM uses the Single-instance storage (SIS) service that takes multiple copies of the content and replaces them with a single shared copy. It allows version control, eliminates data duplication, and increases storage and retrieval efficiency. With version control activated, HSM keeps track of who modified the document, when did the modification occur and what was modified. The administrator can retrieve older versions including files whose shortcuts were deleted from the file server.

# System Requirements

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

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

## Hardware

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

**i** **NOTE:** The application, log files and cache folders require 10 GB of HDD space. If the Archive Manager for Files server includes the database, and is used as a local storage for archived messages, then the the Hard Disk size must be revised to add more space for the database and the file store.

## Operating System

- Windows Server 2012
- Windows Server 2012 R2
- Windows Server 2016
- Windows Server 2019
- Windows Server 2022

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

## Windows Server Roles

- Web Server (IIS)

- Web Server / Common HTTP Features / HTTP Redirection
- Web Server / Performance / Dynamic Content Compression
- Web Server / Security / Basic Authentication
- Web Server / Security / Windows Authentication
- Web Server / Application Development
  - .NET Extensibility 4.5
  - ASP.NET 4.5
- Management Tools / IIS 6 Management Console
- Management Tools / IIS 6 Management Compatibility / IIS 6 Metabase Compatibility
- Management Tools / Management Service

## Windows Features

- Remote Server Administration Tools
  - Role Administration Tools / AD DS and AD LDS Tool / Active Directory module for Windows PowerShell

- .NET Framework 4.5 Features

### For Windows Server 2012 and 2012 R2

- .NET Framework 4.5 Features / .NET Framework 4.5
- .NET Framework 4.5 Features / ASP.NET 4.5
- .NET Framework 4.5 Features / WCF Services (all checkboxes under this item)

### For Windows Server 2016

- .NET Framework 4.6 Features / .NET Framework 4.6
- .NET Framework 4.6 Features / ASP.NET 4.6
- .NET Framework 4.6 Features / WCF Services (all checkboxes under this item)

### For Windows Server 2019

- .NET Framework 4.7 Features / .NET Framework 4.7
- .NET Framework 4.7 Features / ASP.NET 4.7
- .NET Framework 4.7 Features / WCF Services (all checkboxes under this item)

### For Windows Server 2022

- .NET Framework 4.8 Features / .NET Framework 4.8
- .NET Framework 4.8 Features / ASP.NET 4.8
- .NET Framework 4.8 Features / WCF Services (all checkboxes under this item)

## Redistributable packages

- Microsoft Visual C++ 2013 Redistributable Package (x64)
- Microsoft Visual C++ 2015-2022 Redistributable Package (x64)
- Microsoft Visual C++ 2015-2022 Redistributable Package (x86)

## .NET 4.8

Download and install .NET Framework 4.8 from the following link:

<https://dotnet.microsoft.com/en-us/download/dotnet-framework/thank-you/net48-web-installer>

## Database Servers and Drivers

- Microsoft SQL Server 2012 to Microsoft SQL Server 2019
  - Microsoft OLE DB Driver 18 for SQL Server, or newer
- Azure SQL Database
- Oracle 12c to Oracle 19c
  - Oracle client (x86 or x64)

## Web Browsers

Web browsers are required for ArchiveWeb and is included here because this optional component is installed automatically if Express installation is considered.

- Microsoft Edge current version
- Mozilla Firefox current version
- Chrome current version
- Opera current version

## File Systems (Sources)

- Windows Server 2012
- Windows Server 2012 R2
- Windows Server 2016
- Windows Server 2019
- Windows Server 2022
- NTFS including mount-point support



- ReFS
- NetApp Filer (Cluster Mode only)
- EMC VNX

## Clients and protocols

- Windows Clients
- Macintosh clients when CIFS/SMB protocol is used
- AFP protocol (e.g. ExtremeZ-IP software)

## Additional Information

- Installations on Domain Controllers are not supported.
- For remote archiving on Windows shares, NetApp (Cluster Mode) or VNX, we recommend installing the software on a dedicated server.
- The software installs web applications into the Default Web Site. This could cause conflict with other applications like Microsoft CRM or Microsoft SharePoint. To change the installation website, manual changes are required after the installation. Please contact Technical support in such cases.
- Metalogix Archive Manager for Files is fully supported in a virtualized environment.
- It is possible to install Archive Manager for Files on servers without IIS. However, this prevents the creation of HTML shortcuts and VNX archiving and prevents the use of MS Search as the full-text search engine.

## For HSM Server

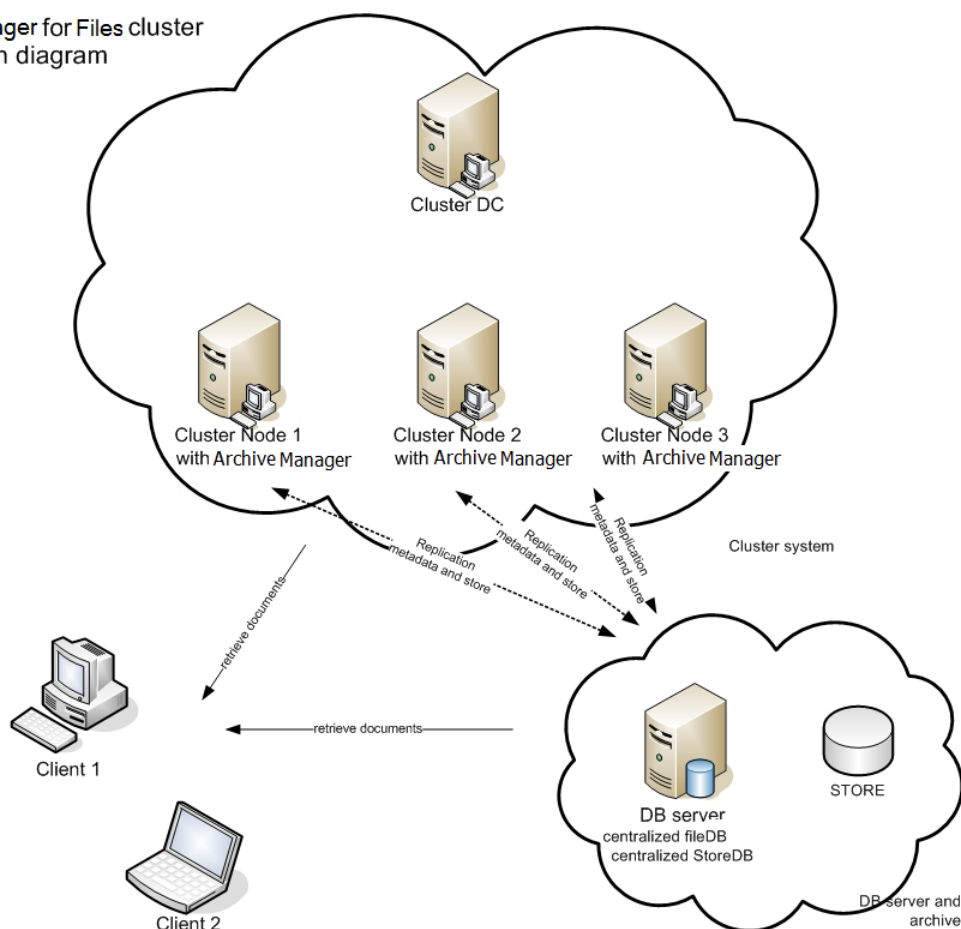
If the HSM component is installed on a dedicated server, the following additional information should be considered:

- .Net Framework 4.5 – if not available, Google Drive store will not be functional.
- Microsoft Web Service Enhancements (WSE) 3.0 - if not available, the iTernity store cannot be created.

# Deployment Plan

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

Archive Manager for Files cluster configuration diagram



## Installation steps:

1. Create a common Archive Manager database (AMFDB).
2. Create a common archive (store) to be used (AMFHSM).
3. Install Archive Manager for Files on all cluster nodes (AMFSERVER).
4. Configure all installations to use the same archive and database.

# About User Accounts

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

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

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

## Considerations for the database user

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

### For SQL Server

#### *Windows Authentication*

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

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

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

### *SQL Server Authentication*

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

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

### **For Oracle**

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

# Advanced Installation

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

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

In this chapter:

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

For next steps after you complete the advanced installation, see [Configuring Archive Manager for Files](#).

## Prepare the Application Servers

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

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

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

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

## For the Archive server (AMFSERVER)

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

## Steps to install the prerequisites

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

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

### Archive Manager for Files

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

### HSM

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

### Search

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

### ArchiveWeb

```
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
```



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

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

## Steps to download the install media

1. Login to the server with the credentials of the Administrator account (eg. **democorp\domadmin**)
2. From your browser, navigate to the <https://www.quest.com/products/metalogix-archive-manager-for-files> page  
  
or  
  
navigate to the <http://www.quest.com/trials> page. Locate the product Metalogix Archive Manager for Files.
3. Click the **Download Free Trial** button.
4. Fill the *Download Your Free Trial* registration form and click **Download Trial**. The file download page appears.
5. Download the install media zip file.
6. The trial license key is specified in the email that is sent to you.
7. Ensure that the files are available locally on the computer on which you are planning to install the Metalogix Archive Manager for Files features.

## Install the Application Features

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

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

[Install HSM and Archive Manager Search](#)

### For the Archive Manager for Files server (AMFSERVER)

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

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

# Install HSM and Archive Manager Search

In this topic:

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

## Worksheet for this installation

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

Item	Description	Example
HSM server	The server where the HSM and Archive Manager Search will be installed.	AMFHSM
Administrator	Windows account that is used to install the application. This is usually the enterprise administrator.	username: democorp\domadmin password: *****
Media Folder	Full path of the folder where the media files are extracted	C:\Metalogix
Installation folder	Full path of the folder where the application files will be installed	C:\Program Files (x86) \Metalogix
HSM Store folder	Full path of the folder that will contain the archived files.	C:\HSM  The local hard drive folder is used as the default media store. Use of other media storage systems are described in the <i>Media Store Administration Guide</i> .
Store name	Name of the media store on a hard drive. With the <i>Advanced Installation</i> option of the installer wizard, only a local hard drive can be setup as a media store.	FilesStore



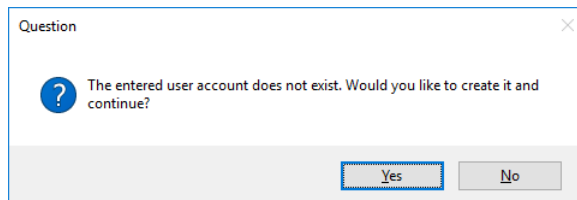
Schema name	Name of a schema in a hard drive media store.	FilesSchema
Database Authentication method	Type of database authentication: <i>Integrated Windows Authentication</i> or <i>SQL Authentication</i>	Integrated Windows Authentication
UserLogin	Username if <i>SQL Authentication</i> is selected	dbadmin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

## Steps to install HSM and Archive Manager Search

1. Log in to the server with the credentials of the Administrator account (eg. **democorp\domadmin**).
2. Run the **Metalogix Archive Manager Installation Package** to extract the files to a local folder.
3. If the installer does not start immediately, run the **MAMInstaller.exe** from your install media folder. The *Welcome* window opens.
4. From the navigation panel on the left, click **PLANNING**. The *Planning* window opens. Review the requirements and release notes. If necessary, visit the Quest website for more information.
5. From the navigation panel on the left, click **INSTALLATION**. The *Server Installation* window opens. Read the **Software Transaction Agreement**. If you wish to proceed, select the **I accept the terms of the license agreement** check box.
6. Click **Next**. The *Installation Mode* window opens. Select the **Advanced installation** option.
7. Click **Next**. The *Installation Components* window opens. Select **HSM** and **Archive Manager Search**.
8. Click **Next**. The *Database Engine* selection window opens. Select either **Microsoft SQL Server** (for on-premise MS SQL Database Server or Azure SQL Database) or **Oracle**.
9. Click **Next**. The *Checking Prerequisites* window opens with database-specific prerequisites. If one or more prerequisites are missing, the **Next** button is deactivated. Click **Install** to install each prerequisite.

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

If the superuser does not exist, the wizard will request permission to create the superuser account in the Active Directory and grant the necessary permissions on this server to work with the installed features. If the superuser exists, the dialog shown below does not appear. If the permissions dialog appears, click **Yes**.



11. Click **Next**. The *Database Server Connection* window opens.
12. From the *Component* column, select **HSM**.

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

Enter the database parameter values described below:

*For Microsoft SQL Server*

- Authentication** - database authentication method.
- UserLogin** - Username if **SQL Authentication** or **Oracle client** is selected. Otherwise this field is deactivated.
- Password** - Database password if **SQL Authentication** or **Oracle client** is selected. Otherwise this field is deactivated.

- d. **Schema name** - Username of the installer account without the domain prefix. For example **dbo**.
- e. **Server name** - The name of the server where you are installing the HSM and Archive Manager Search.
- f. **Database name** - The name of the database that will contain the HSM metadata. The default name is **MAMHSM**.

*For Oracle*

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

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

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

Archive Manager Installation Wizard

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

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

The Hierarchical Storage Manager (HSM) stores the archived content of files. The HSM also manages the Single Instance Function so that identical files are stored only once no matter how many times they occur in the file system.

**Local HSM installation**

HSM server:

Store name:  Schema name:

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

Store folder:

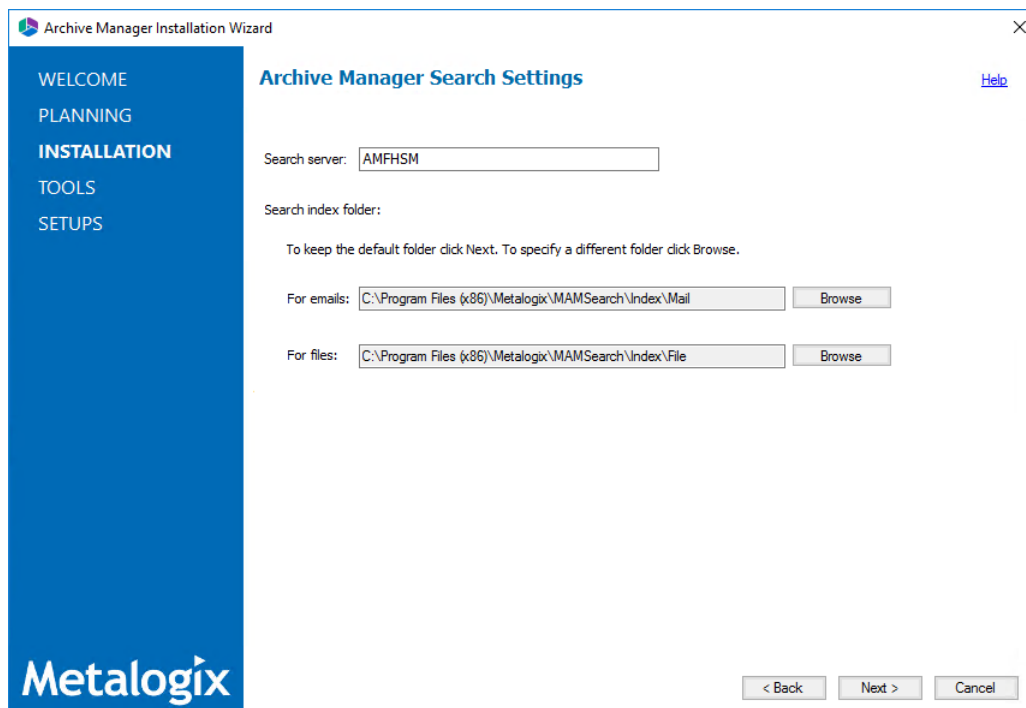
**Metalogix**

< Back   Next >   Cancel

16. Specify the parameter values as described below:

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

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



Specify the parameter values as described below:

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

18. Click **Next**. The *Firewall Settings* window opens. Select the **Allow installation package to change the firewall settings** check box. Metalogix Archive Manager for Files features will be then able to communicate through the firewall.

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

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

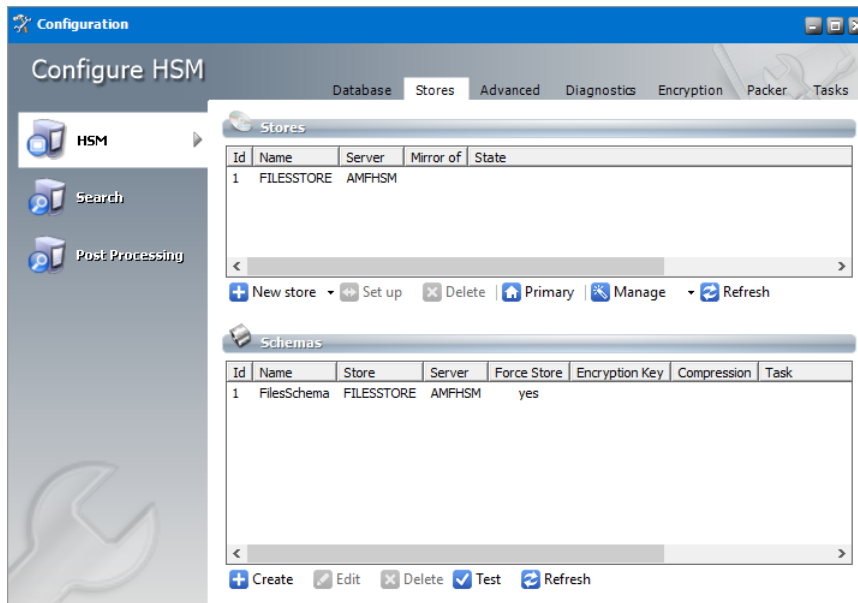
21. The installer proceeds to install all the features. If a feature installation fails or completes with a warning, expand the row to view and address the problem.

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

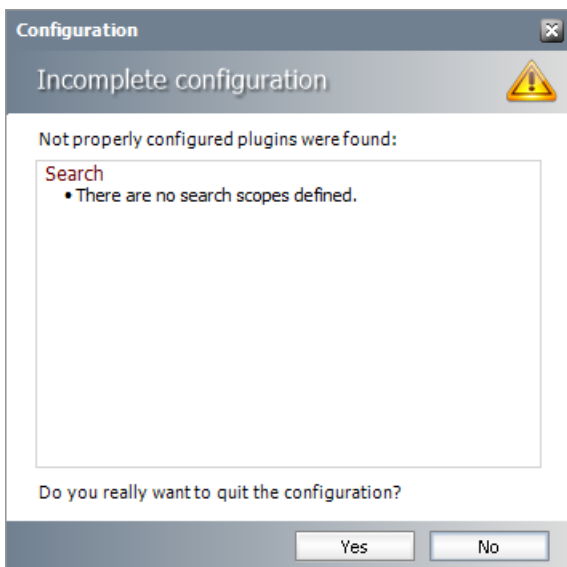
## Steps to verify the installation

1. Open **Start > Metalogix > Archive Manager Configuration**. The *Configuration* wizard opens.
2. From the navigation panel, click **HSM**. The *Configure HSM* widow opens and the **Database** tab is displayed by default. Verify that the values are as expected.

- Click the **Stores** tab to display information about the media store. Verify that the values in the *Stores* and *Schemas* sections are as expected.



- From the navigation panel, click **Search**. The *Configure Search* window opens. Verify that the values are as expected.
- From the navigation panel, click **Post Processing**. The *Configure Post Processing* window opens. Verify that the values are as expected.
- Close the *Configuration* wizard. If the *Incomplete configuration* dialog opens, click **Yes** to dismiss the window and close the wizard.



# Install Archive Manager for Files

In this topic:

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

## Worksheet for this installation

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

Item	Description	Example
License Key	The license key that you received from Quest. If you don't have a license key, contact your Quest representative.	894K5-3M448-M544E-A594A-7K8Z7 (Sample only. This key is neither an active nor an expired license key)
Archive Manager for Files server	The server where the Archive Manager for Files will be installed.	AMFSERVER
Installer account	Windows account that is used to install the application. This is usually the enterprise administrator.	username: democorp\domadmin password: *****
Superuser account	Windows account that is used to run the application and run the Archive Manager for Files services.	username: democorp\mamadmin password: *****
Media Folder	Full path of the folder where the media files are extracted	C:\Metalogix
Installation folder	Full path of the folder where the application files will be installed	C:\Program Files (x86) \Metalogix
Database Authentication method	Type of database authentication: <i>Integrated Windows Authentication</i> or <i>SQL Authentication</i>	Integrated Windows Authentication

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

## Steps to install Metalogix Archive Manager for Exchange

1. Log in to the server with the credentials of the **enterprise administrator** (eg. **democorp\domadmin**).
2. Run the **Metalogix Archive Manager Installation Package** to extract the files to a local folder.
3. If the installer does not start immediately, run the **MAMInstaller.exe** from your install media folder. The *Welcome* window opens.
4. From the navigation panel on the left, click **PLANNING**. The *Planning* window opens. Review the requirements and release notes. If necessary, visit the Quest website for more information.
5. From the navigation panel on the left, click **INSTALLATION**. The *Server Installation* window opens. Read the **Software Transaction Agreement**. If you wish to proceed, select the **I accept the terms of the license agreement** check box.
6. Click **Next**. The *Installation Mode* window opens. Select the **Advanced installation** option.
7. Click **Next**. The *Installation Components* window opens.

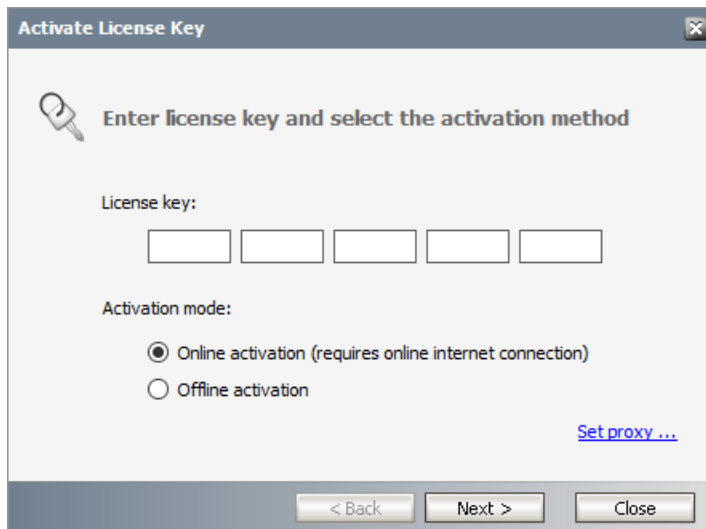
Select **Archive Manager for Files**.

**i** **NOTE:** **Archive Manager for Exchange** could be installed on the same server. Installation of Archive Manager for Exchange is described in the *Metalogix® Archive Manager for Exchange Advanced Installation Guide*. **ArchiveWeb** is an enhancement. Installation of ArchiveWeb is described in the *Metalogix® Archive Manager for Files ArchiveWeb Guide*.

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

Select either **Microsoft SQL Server** (for on-premise MS SQL Database Server or Azure SQL Database) or **Oracle**.

9. Click **Next**. The *Checking Prerequisites* window opens. If one or more prerequisites are missing, the **Next** button will appear deactivated. Click **Install** for each prerequisite to install the missing features. Scroll down to expose and install all the prerequisites.
10. Scroll down to the bottom of the window. Click **Validate your license**. The *Activate License Key* dialog opens.



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

11. In the **Checking Prerequisites** window, click **Next**. The *Superuser Account* window opens.  
Specify the **Superuser name** and **Password**. Enter the password again in the **Retype password** field.
12. Click **Next**. The *Database Server Connection* window opens.



**Archive Manager Installation Wizard**

**Database Server Connection**

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

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

**Authentication**

Authentication type: Integrated Windows Authentication

**Server instance**

Schema name: dbo  
 Server name: AMFDB  
 Database name: MAMFILE

**Authentication**

Authentication type:

< Back Next > Cancel

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

Enter the database parameter values described below:

*For Microsoft SQL Server*

- Authentication** - database authentication method.
- UserLogin** - Username if **SQL Authentication** or **Oracle client** is selected. Otherwise this field is deactivated.
- Password** - Database password if **SQL Authentication** or **Oracle client** is selected. Otherwise this field is deactivated.
- Schema name** - Username of the installer account without the domain prefix. For example **dbo**.
- Server name** - The name of the server where you are installing the HSM and Archive Manager Search.
- Database name** - The name of the database that will contain the HSM metadata. The default name is **MAMHSM**.

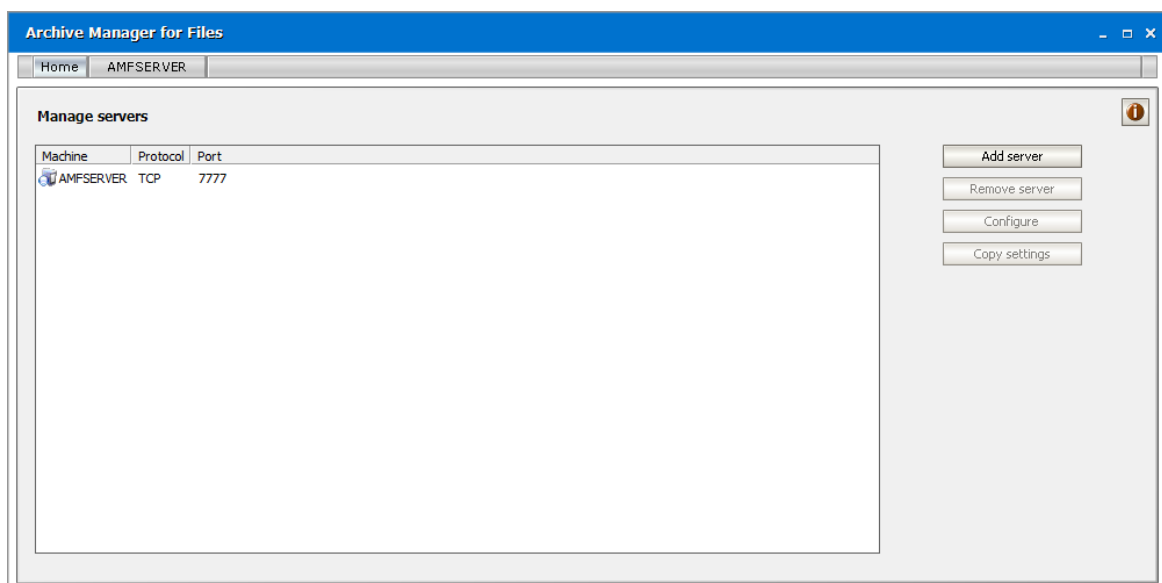
*For Oracle*

- Oracle net name** - net service name that describes the network address of the database server in your `tnsnames.ora` file.
- Schema** - name of the Oracle schema from your `tnsnames.ora` file.
- User name** - database login user name.
- Password** - password of the database user.

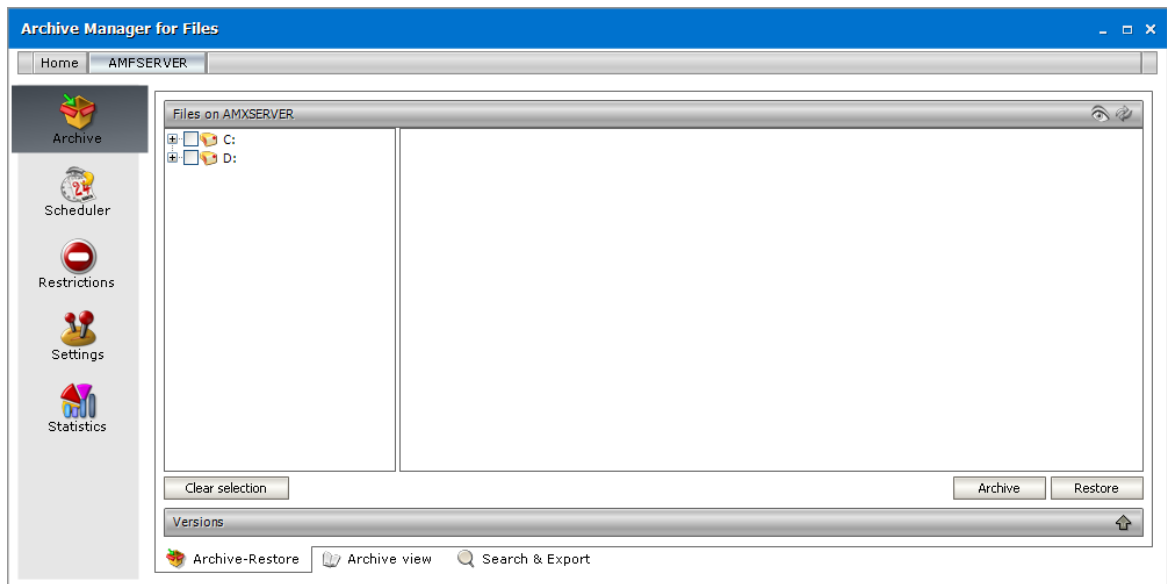
13. Click **Next**. The *Hierarchical Storage Manager Settings* window opens. In the **HSM server name** field enter the name of the server where the HSM application feature is installed. For example **AMFHSM**.
14. Click **Next**. The *Please select the type of installation* window opens. In the **Search server** field enter the name of the server where the Archive Manager Search feature is installed. For example **AMFHSM**.
15. Click **Next**. The *Firewall Settings* window opens. Select the **Allow programs to communicate through Windows Firewall** check box. Metalogix Archive Manager for Files features will be then able to communicate through the firewall.
16. Click **Next**. The *Summary Installation* window opens. The installation summary displays settings you have specified in previous steps.
  - a. Select **Manage the Organizational Forms Library** if your organization uses this public folder to share email templates. Otherwise, clear the check box.
  - b. Select the check box **Start Metalogix Archive Manager for Files** to open the Archive Manager for Files Administration Center (AMAC) when the installation completes.
17. Click **Install** to start the installation.
18. Click **Finish** to complete the installation step.
19. The Archive Manager for Files Administration Center (AMAC) should open automatically if the check box **Start Metalogix Archive Manager for Files** was checked in the *Summary Installation* step of the installation wizard.

## Steps to configure and verify the Archive server

1. If the AMAC is not already open, click **Start > Metalogix > Archive Manager for Files**. The AMAC opens. The **Home** tab displays the Archive Manager for Files server where the software was installed (AMFSERVER)



2. Click the **AMFSERVER** tab. The *Workspace* for the server opens.



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# Manual Installation

In this chapter:

- [Prepare the Application Servers](#)
  - [Steps to install the prerequisites](#)
  - [Steps to download the install media](#)
- [Install the Application Features](#)
  - [Install HSM](#)
  - [Install Search](#)
  - [Install Archive Manager for Files](#)

## Prepare the Application Servers

In this topic:

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

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

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

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

### For the Archive server (AMFSERVER)

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



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

## Steps to install the prerequisites

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

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

### Archive Manager for Files

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

### HSM

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

### Search

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

### ArchiveWeb

```
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
```



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

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

## Steps to download the install media

1. Login to the server with the credentials of the Administrator account (eg. **democorp\domadmin**)
2. From your browser, navigate to the <https://www.quest.com/products/metalogix-archive-manager-for-files> page

or

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

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

## Install the Application Features

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

The installations steps described in [Install HSM and Archive Manager Search](#) includes the the installation of the *Archive Manager Post-processing* feature.

### For the Archive Manager for Files server (AMFSERVER)

The installations steps described in [Installation of Archive Manager for Files](#) includes the the installation of all sub-features.

## Install HSM

In this topic:

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

## Worksheet for this installation

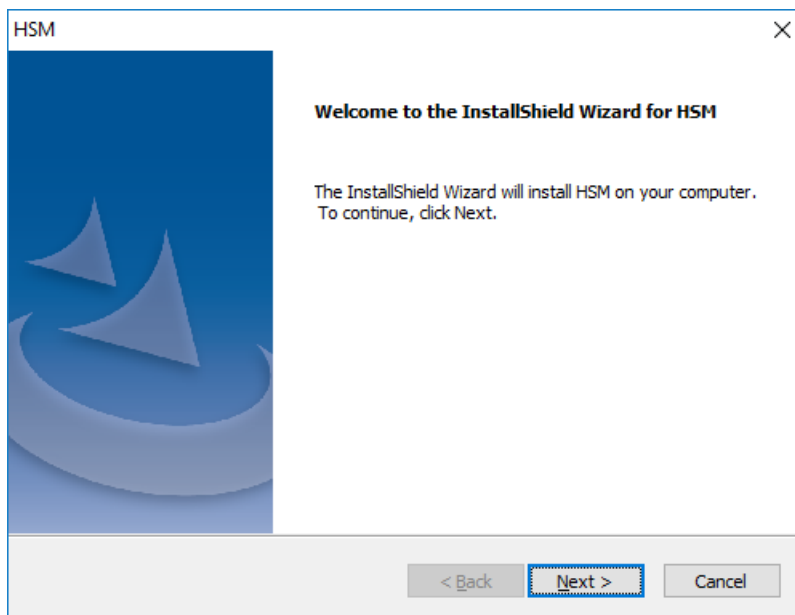
The following information will be required through the installation process. Sample values are provided here as a guidance.

Item	Description	Example
HSM server	The server where the HSM and Archive Manager Search will be installed.	AMFHSM
Administrator	Windows account that is used to install the application and run the Archive Manager for Exchange services.	username: democorp\domadmin password: *****
Media folder	Full path of the folder where the media files are extracted	C:\Metalogix
Installation folder	Full path of the folder where the application files will be installed	C:\Program Files (x86) \Metalogix
HSM Store folder	Full path of the folder that will contain the archived files.	C:\HSM  The local hard drive folder is used as the default media store. Use of other media storage systems are described in the <i>Media Store Administration Guide</i> .
Store name	Name of the media store on a hard drive. With the <i>Advanced Installation</i> option of the installer wizard, only a local hard drive can be setup as a media store.	FILESTORE
Schema name	Name of a schema in a hard drive media store.	FILESHEMA
Database Authentication method	Type of database authentication: <i>Integrated Windows Authentication</i> or <i>SQL Authentication</i>	Integrated Windows Authentication

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

## Steps to install the application

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



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



**HSM**

**Logon Information**  
Specify a user account and password.

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

User name:  
democorp\domadmin

Password:  
.....

Confirm password:  
.....

InstallShield

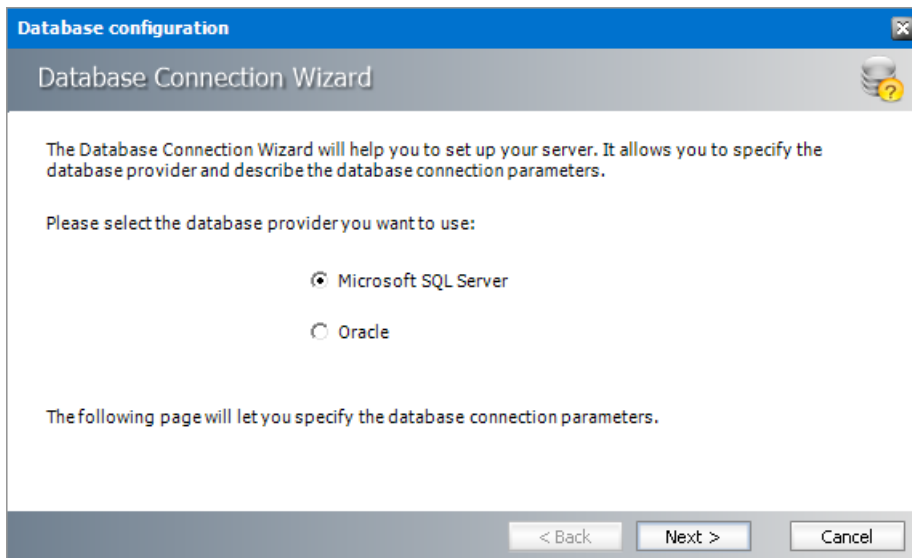
< Back   Next >   Cancel

Enter the information as described below:

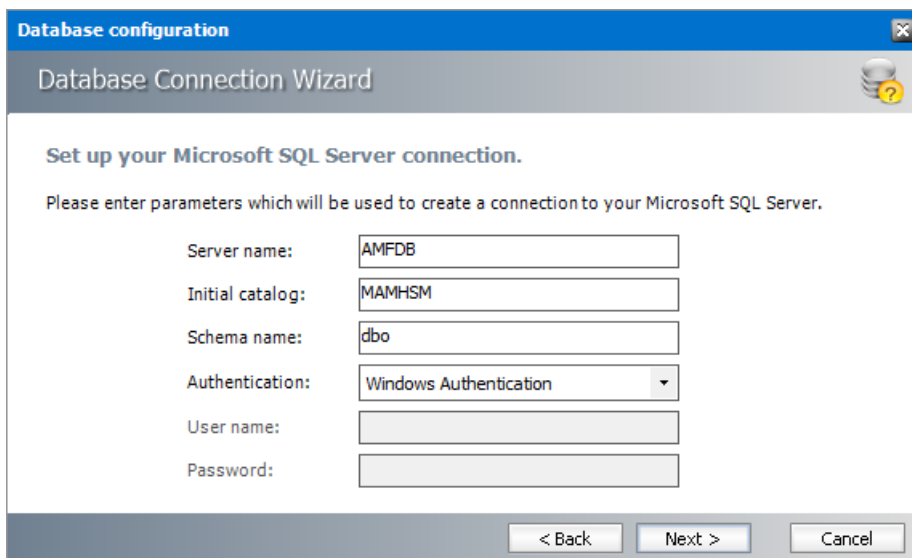
- a. **User name** - login name of the administrator (for example, democorp\domadmin)
  - b. **Password** - password of the administrator
  - c. **Confirm password** - same as the Password.
9. Click **Next**. The *Firewall Settings* window opens. Select **Allow programs to communicate through Windows Firewall**.
  10. Click **Next**. The *Ready to install the Program* window opens.
  11. Click **Install**. The installation starts and the progress is displayed on the *Setup Status* window. When the installation completes, the *InstallShield Wizard Complete* window opens.
  12. Click **Finish** to close the installer. The *Configuration* wizard opens and you can verify that HSM has been installed if it appears in the tool.

## Steps to configure the HSM database connection

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



4. Select either **Microsoft SQL Server** (for on-premise MS SQL Database Server or Azure SQL Database) or **Oracle** and click **Next**. If you choose **Microsoft SQL Server**, the *Database Connection* window opens for the Microsoft SQL Server connection information.

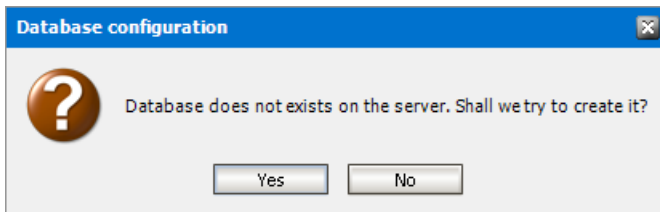


*For Microsoft SQL Server*

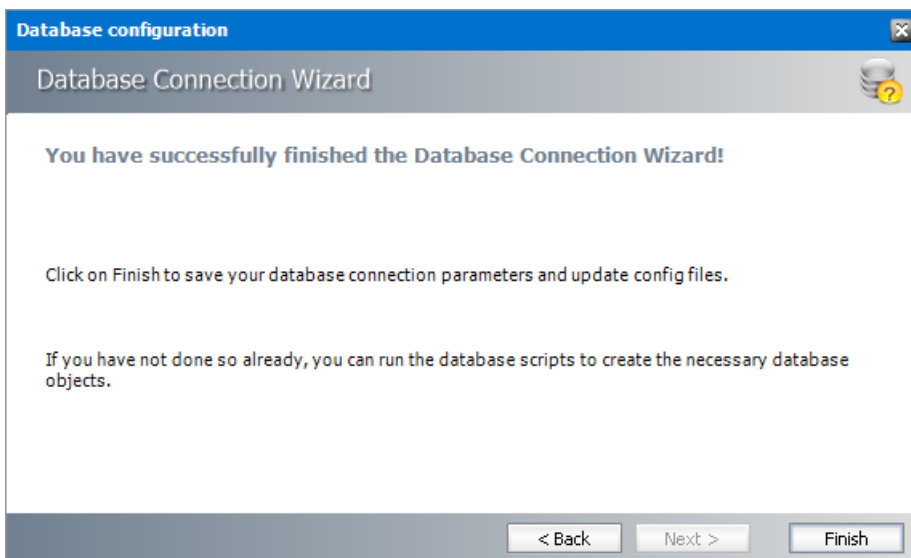
- a. **Server name** - name of the SQL server (eg. **AMFDB**)
- b. **Initial catalog** - name of the HSM database (e.g. **MAMHSM** which is the default name of the HSM database)
- c. **Schema name** - name of the SQL Schema (e.g. **dbo**)
- d. **Authentication** – authentication type used for the database.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

*For Oracle*

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



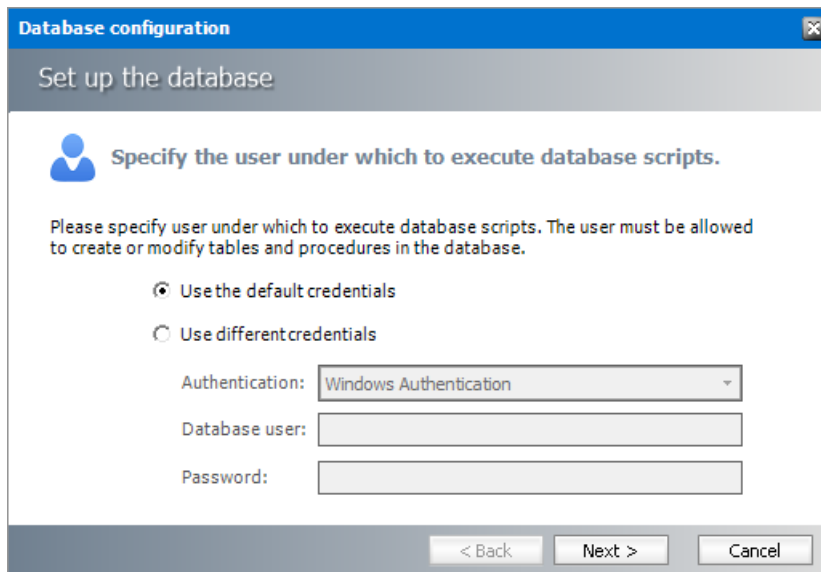
6. If the database connection is setup successfully, the configuration completion window opens.



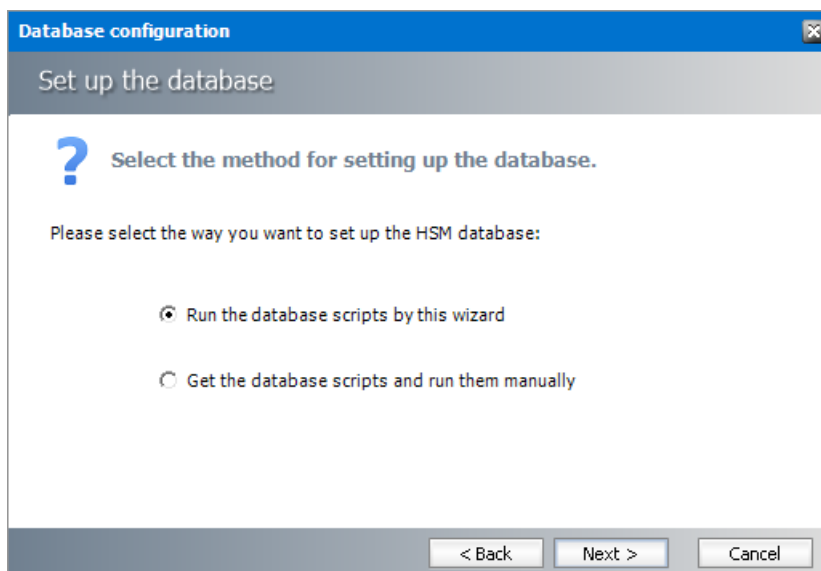
7. Click **Finish** to close the *Database Connection* wizard.

## Steps to install the HSM database

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



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

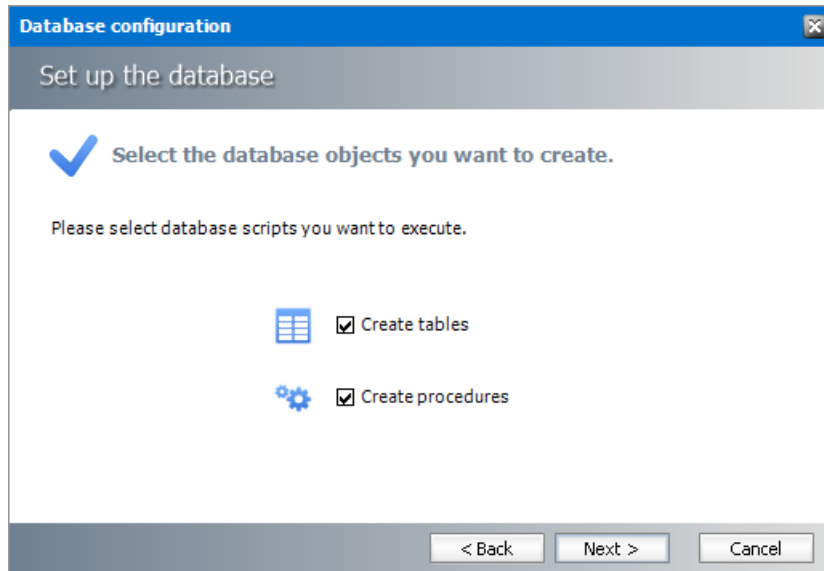


In the *Select the method for setting up the database* step, choose one of the following options:

- a. **Run the database scripts by this wizard** - the installer will automatically run the scripts to create the tables and procedures required for the database.

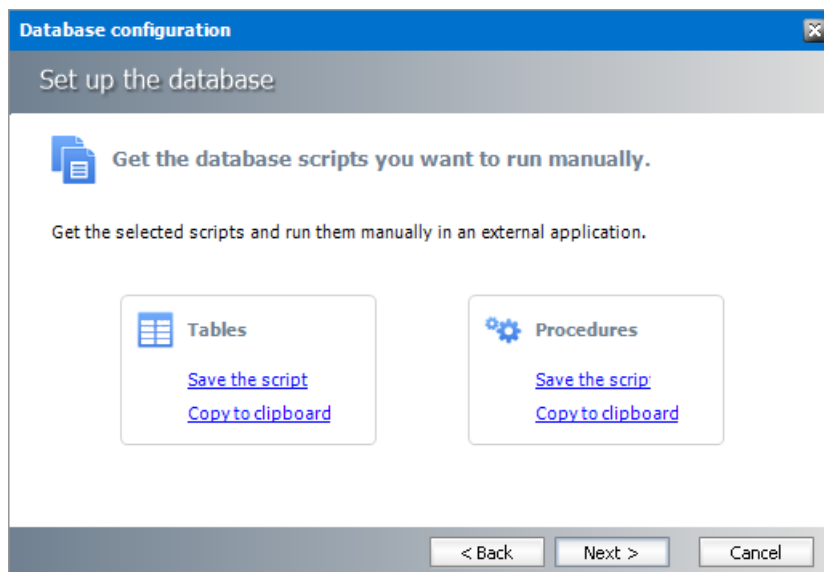
- b. **Get the database scripts and run them manually** - you get the option to either save the scripts or copy it to clipboard and paste it elsewhere.
6. Click **Next**. Depending on your selection, one of the following windows open:

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



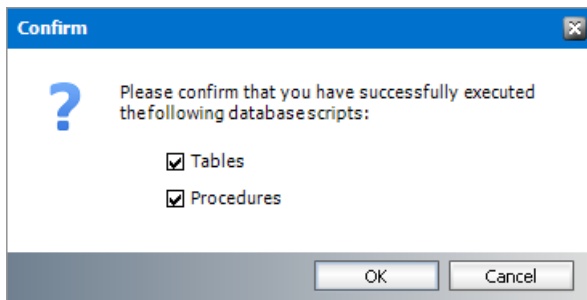
Select both check boxes: **Create tables** and **Create procedures**.

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



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

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

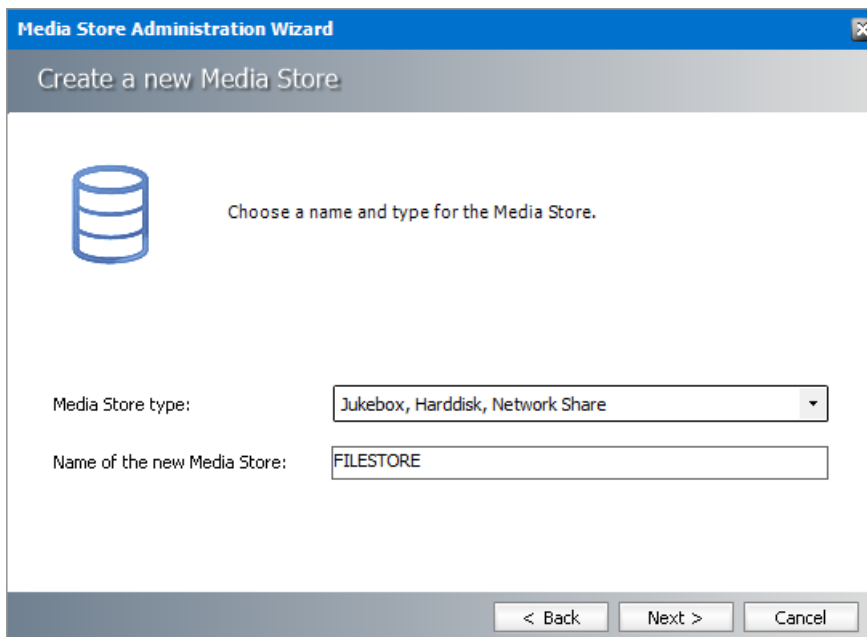


Select both check boxes after you run scripts and click **OK**.

8. If the installation is successful, the confirmation dialog opens. Click **OK** to close the dialog. The database setup completion window opens.
9. Click **Finish** to close the script installer. The *Scripts* section of the **Database** tab displays the status and version of the scripts (the version of the scripts you install may differ from the version shown in the image below).
10. Keep the *Configuration* wizard open for next steps.

## Steps to configure the HSM stores and schemas

1. From the feature panel on the left of the *Configuration* wizard, click **HSM** and select the **Stores** tab.
2. From the *Stores* section click **New Store**. The *Create a new media Store* window opens.



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

**Media Store Administration Wizard**

Jukebox, Harddisk, Network Share

Choose a location where the archived files should be saved.  
Use a supported storage provider for this Media Store.

Storage provider : Hard disk, UNC Path

Path for the Media Store: \\AMFHSM\HSM [Browse](#)

Allow multiple saving: ☐

Path for multiple saving:  Browse

Path for fast file access:

Retention time support: <None>

< Back Next > Cancel

Enter the information as described below;

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

**Media Store Administration Wizard**

Jukebox, Harddisk, Network Share

Please choose the PamServers where the Media Store should connect to:  
Please choose how long the Media Stores pauses before it tries to connect to the PamServers. This gives the PamServer the possibility to start completely before the Media Store tries to connect to this PamServer the first time.

HSM Servers where the Media Store should connect to:

AMFHSM(HSM)

+ Add - Remove Up Down

Connection interval between the Media Store and the HSM Server:

10 seconds

< Back Next > Cancel

**Add Server**

Specify the server where this store should connect.

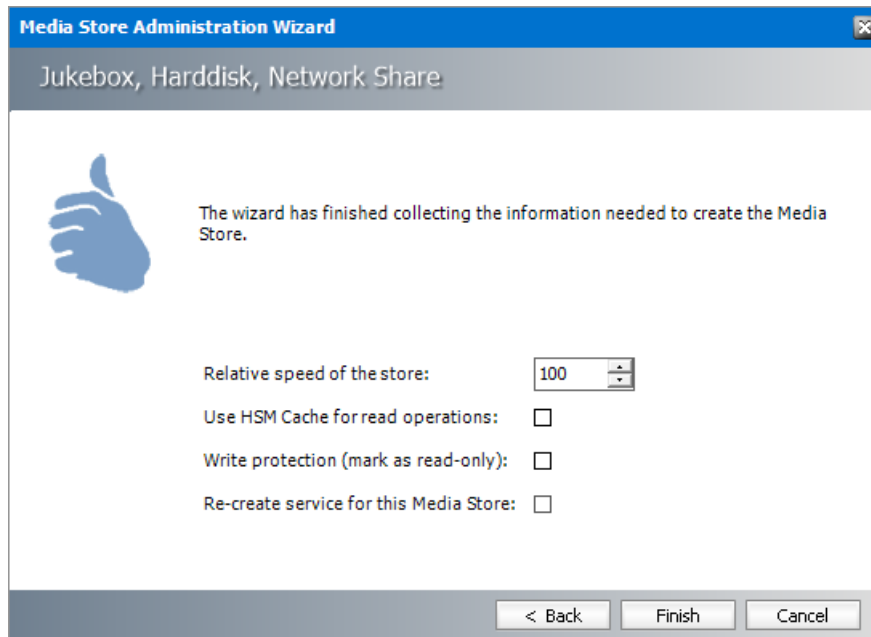
Server type: HSM Server

Server name: AMFHSM

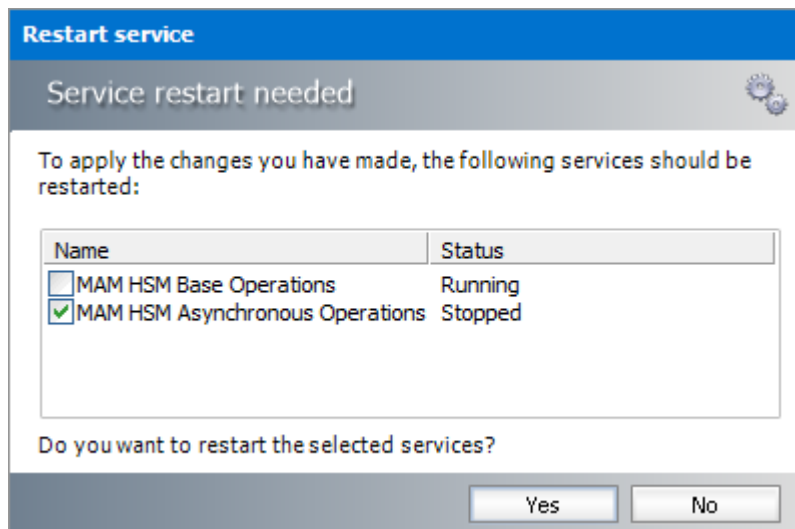
OK Cancel

5. Click **Add**. The *Add Server* window opens. Enter the following information:
  - a. **Server type** - select **HSM Server**
  - b. **Server name** - name of the server where HSM is installed (eg. **AMFHSM**)

6. Click **OK** to close the window and add the the HSM Server to the list.
7. Click **Next**. The final configuration window appears.



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



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

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



**HSM Schema**

Create new schema

Store: FILESTORE@AMFHSM

Schema name: FILESCHEMA

Enforce store: ☐

Encryption: <none>

Task: <none>

Compression: ☐

Exclude files: .gz;.zip;.rar;.jpg

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

Packer: <none>

OK Cancel

Enter the following information:

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

**Configuration**

Configure HSM

Database Stores Advanced Diagnostics Encryption Packer Tasks

**Stores**

ID	Name	Server	Mirror of	State
1	FILESTORE	AMFHSM		Running

+ New store - Set up - Delete Primary Manage Refresh

**Schemas**

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

+ Create - Edit - Delete - Test Refresh

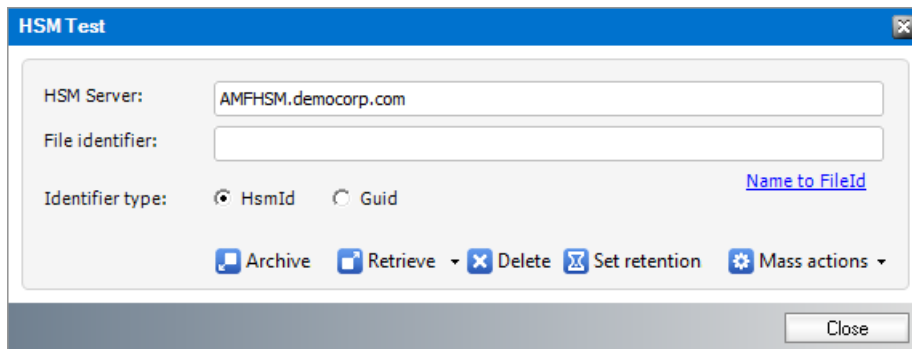
13. Close the *Configuration* wizard.

**i** **NOTE:** The steps to create a local media store described above with default values completes the HSM installation. HSM offers more capabilities that can be configured.

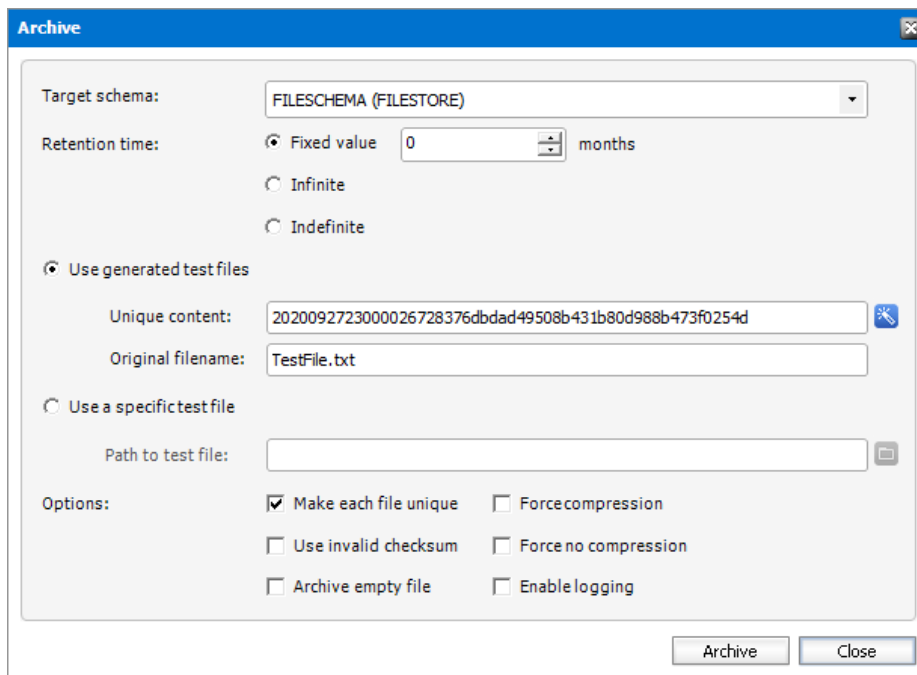
Configuration of HSM is described in detail in the *HSM Installation and Configuration Guide*. A large selection of media store types that are supported by Metalogix Archive Manager for Files are described in the *Media Store Administration Guide*.

## Steps to test the HSM and Media Store connectivity

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

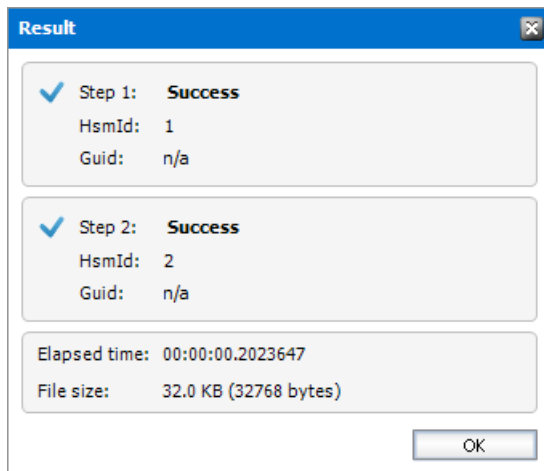


3. Click **Archive**. The *Archive* window opens.

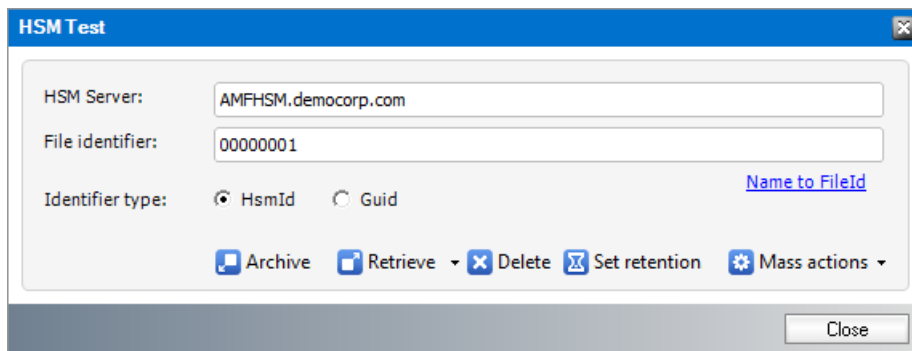


Keep the default test file settings. Copy the value in the **Unique content** field if you wish to test the retrieve process.

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

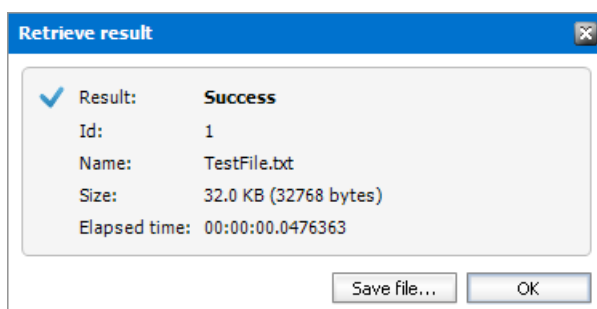


5. Verify that the result indicates success. Then click **OK** to close the *Result* window. Then close the *Archive* window.
6. In the *HSM Test* window, enter the name of the file that was archived in the Media Store during the archive test.



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

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



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

# Install Search

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

In this topic:

## For Archive Manager Search

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

## For Post Processing

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

## Worksheet for this installation

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

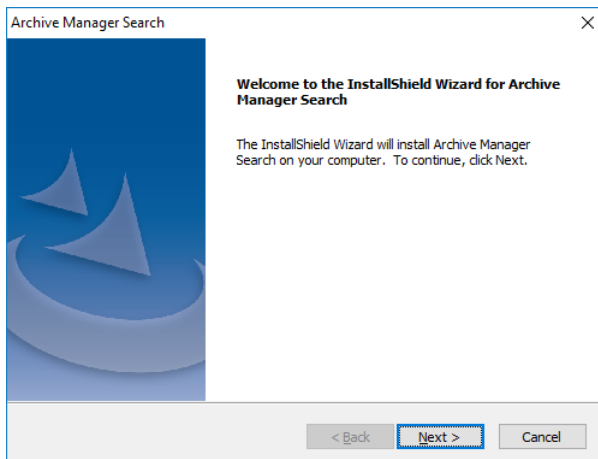
Item	Description	Example
HSM server	The server where the HSM and Archive Manager Search will be installed.	AMFHSM
Administrator	Windows account that is used to install the application and run the Archive Manager for Exchange services.	username: democorp\domadmin password: *****
Media folder	Full path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

Installation folder	Full path of the folder where the application files will be installed	C:\Program Files (x86)\Metalogix
HSM Store folder	Full path of the folder that will contain the archived files.	C:\HSM  The local hard drive folder is used as the default media store. Use of other media storage systems are described in the <i>Media Store Administration Guide</i> .
Store name	Name of the media store on a hard drive. With the <i>Advanced Installation</i> option of the installer wizard, only a local hard drive can be setup as a media store.	FILESTORE
Schema name	Name of a schema in a hard drive media store.	FILESHEMA
Database Authentication method	Type of database authentication: <i>Integrated Windows Authentication</i> or <i>SQL Authentication</i>	Integrated Windows Authentication
UserLogin	Username if <i>SQL Authentication</i> is selected	dbadmin
Password	Database password if <i>SQL Authentication</i> is selected	*****
Database server	The database server instance name where the databases for Archive Manager for Files will be installed.	AMFDB

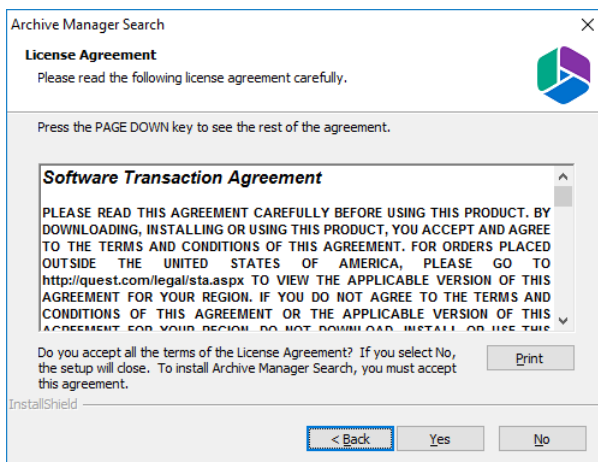
## Steps to install Archive Manager Search

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

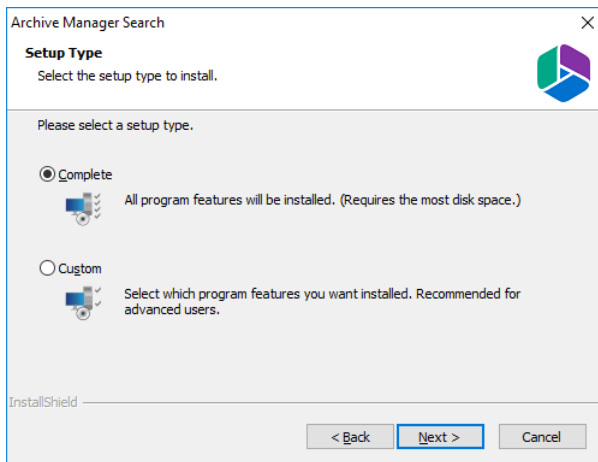
4. Close the integrated installer wizard which starts automatically.
5. Run the Archive Manager Search setup from <Media folder>\Archive Manager Installation Package\Archive Manager Search\Archive Manager Search Setup.exe.
6. A prerequisite check occurs and missing requirements if any are displayed. Click **Install** to ensure all missing requirements are installed.
7. The *Welcome* window of the HSM installer opens.



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

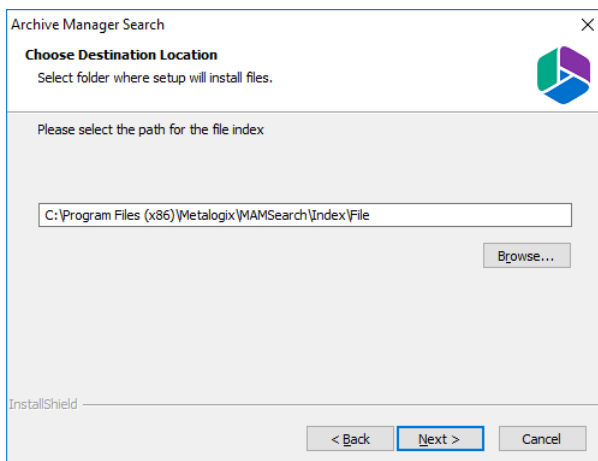


9. Click **Yes** to accept the license. The *Setup Type* window opens. Click **Print** if you wish to print the license agreement.

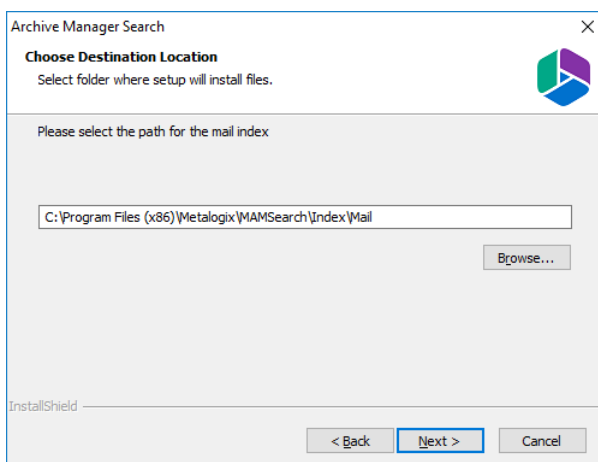


Select **Complete** to include *Post Processing* service. If you select **Custom**, you can modify the installation folder path which defaults to C:\Program Files (x86)\Metalogix\MAMSearch, and choose to whether you want to install Archive Manager Search or Post Processing or both.

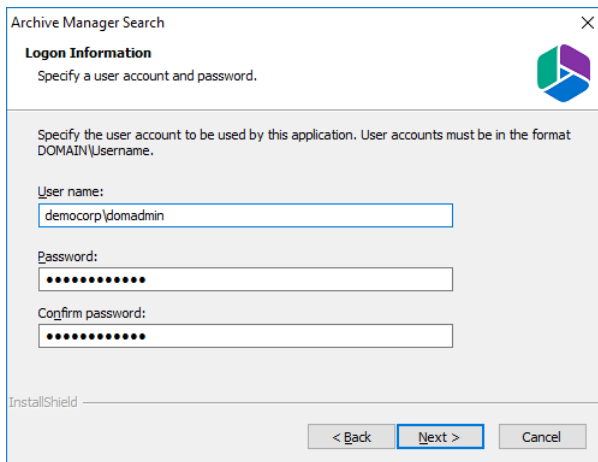
10. Click **Next**. The *Choose Destination Location* windows opens. This setting is for the *Metalogix Archive Manager for Files* product and is not used by Metalogix Archive Manager for Exchange.



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



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



Archive Manager Search

**Logon Information**  
Specify a user account and password.

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

User name:  
democorp\domadmin

Password:  
••••••••

Confirm password:  
••••••••

InstallShield

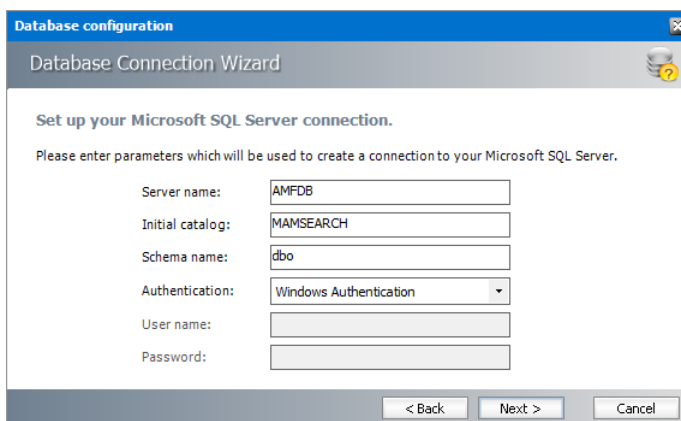
< Back Next > Cancel

Enter the information as described below:

- a. **User name** - logon name of the superuser (for example, democorp\mamadmin)
  - b. **Password** - logon password of the superuser
  - c. **Confirm password** - same as the Password.
13. Click **Next**. The *Firewall Settings* window appears. Select the check box **Allow programs to communicate through Windows Firewall**.
  14. Click **Next**. The *Ready to Install the Program* window opens.
  15. Click **Install**. The *InstallShield Wizard Complete* window opens.

## Steps to configure the Search database connection

1. When the installation completes, the *Configuration* wizard opens. If it does not open automatically, click **Start > Metalogix > Archive Manager Configuration**.
2. From the feature panel on the left, click **Search** and select the **Database** tab.
3. Click **Configure**. The *Database Connection Wizard* opens.
4. Select either **Microsoft SQL Server** (for on-premise MS SQL Database Server or Azure SQL Database) or **Oracle** and click **Next**. The database connection information window opens for the selected database.



Database configuration

Database Connection Wizard

Set up your Microsoft SQL Server connection.

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

Server name: AMFDB

Initial catalog: MAMSEARCH

Schema name: dbo

Authentication: Windows Authentication

User name:

Password:

< Back Next > Cancel

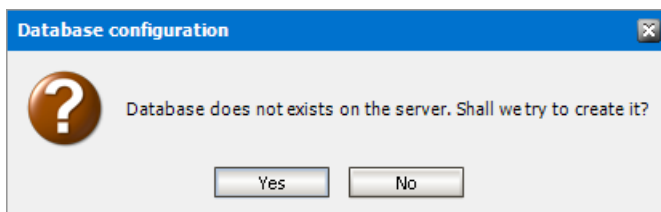


*For Microsoft SQL Server*

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

*For Oracle*

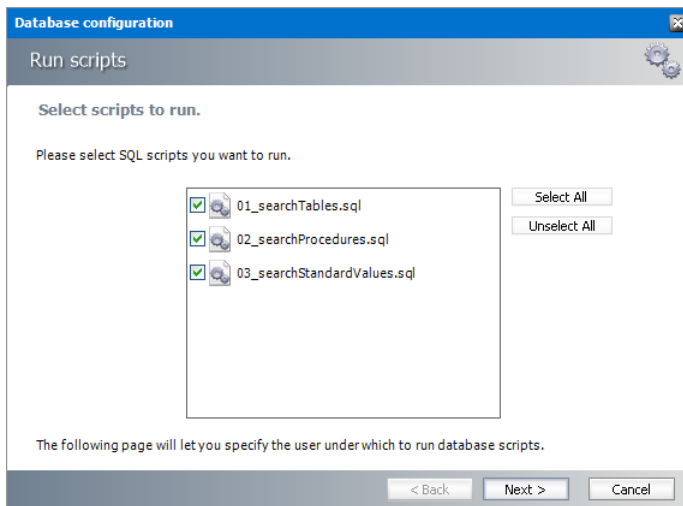
- a. **Oracle net name** - net service name that describes the network address of the HSM database in your `tnsnames.ora` file (eg. **AMFDB**)
  - b. **Schema** - name of the HSM database (e.g. **MAMSEARCH** which is the default name of the Archive Manager Search database)
  - c. **User name** - database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



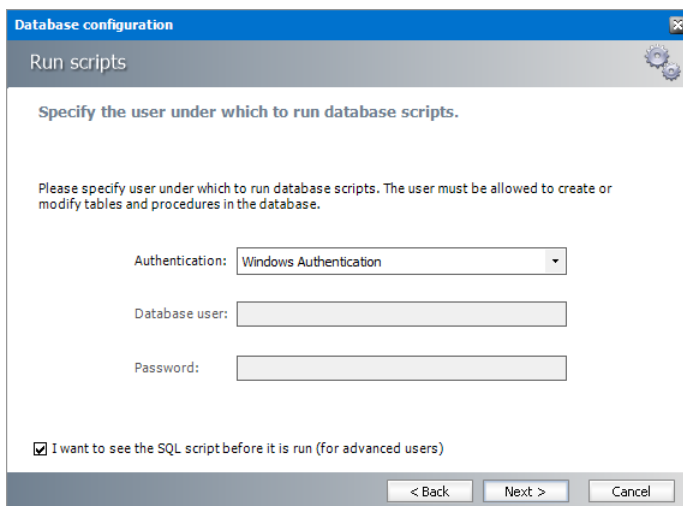
6. If the database connection is setup successfully, the configuration confirmation window opens.
7. Click **Finish** to close the *Database Connection* wizard.

## Steps to install the Search database

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

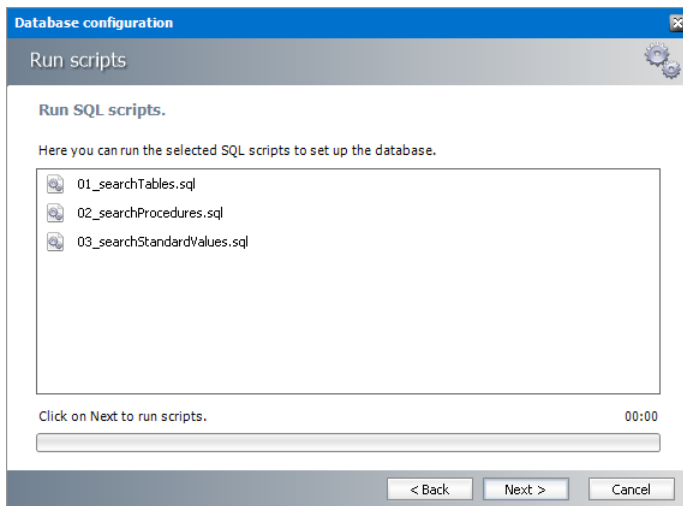


3. Click **Select All** to select all check boxes. Click **Next**. The *View SQL scripts* window opens.
4. Click **Next**. The *Run Scripts* authentication window opens.



Enter the information as described below:

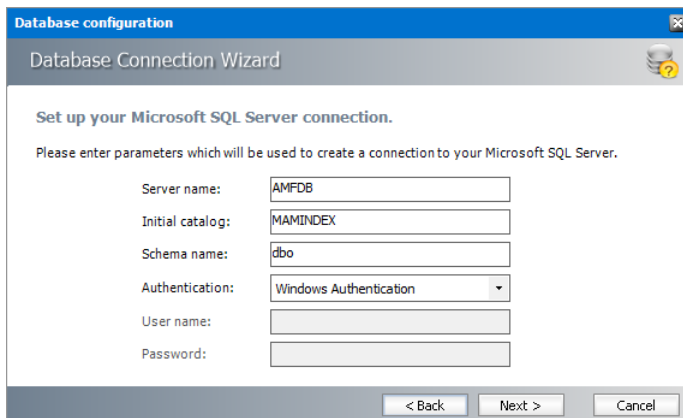
- a. **Authentication** - authentication type used for the database. Choose either **Windows authentication** or **SQL Server authentication**
- a. **User name** - database login user name if *SQL Server authentication* is the selected as the authentication mode.
- b. **Password** - password of the database user if *SQL Server authentication* is the selected as the authentication mode.
- c. (optional) Check the **I want to review the SQL Scripts** check box to view the scripts.
5. Click **Next**. If you chose to view the SQL scripts then the *View SQL scripts* window opens. If you chose to view the Oracle scripts then the *View Oracle scripts* window opens. Click **Save Script** to save the script as a script file to a folder. Check the **Word wrap** check box to display long lines as multiple lines of text.
6. Click **Next**. The *Run SQL scripts* window reopens with the scripts you have chosen to run.



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

## Steps to configure the Post Processing database connection

1. When the installation completes, the *Configuration* wizard opens. If it does not open automatically, click **Start > Metalogix > Archive Manager Configuration**.
2. From the feature panel on the left, click **Post Processing** and select the **Database** tab.
3. Click **Configure**. The *Database Connection Wizard* opens. Select either **Microsoft SQL Server** (for on-premise MS SQL Database Server or Azure SQL Database) or **Oracle** and click **Next**. The database connection information window opens for the selected database.



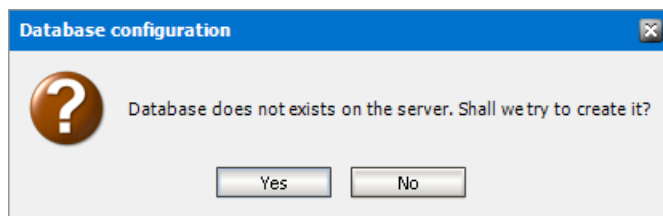
*For Microsoft SQL Server*

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

- e. **User name** - database login user name if *SQL Server authentication* is the selected as the authentication mode.
- f. **Password** - password of the database user if *SQL Server authentication* is the selected as the authentication mode.

For Oracle

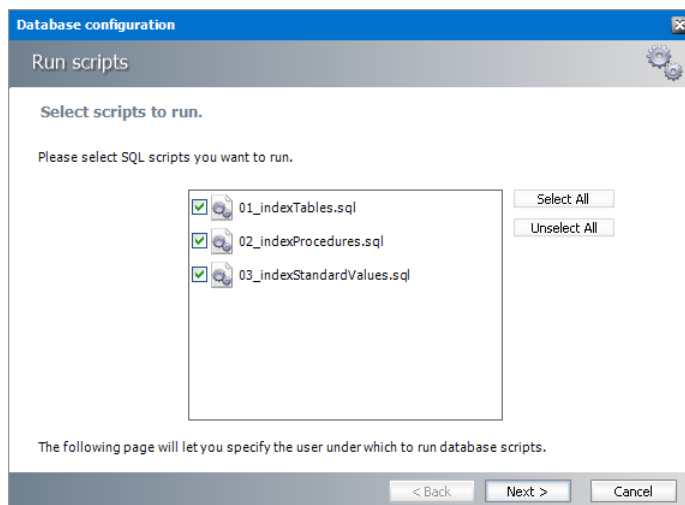
- a. **Oracle net name** - net service name that describes the network address of the HSM database in your `tnsnames.ora` file (eg. **AMFDB**)
  - b. **Schema** - name of the Archive Manager for Files database (e.g. **MAMFILE** which is the default name of the Archive Manager for Files database)
  -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



5. If the database connection is setup successfully, the confirmation window opens.
6. Click **Finish** to close the *Database Connection* wizard.

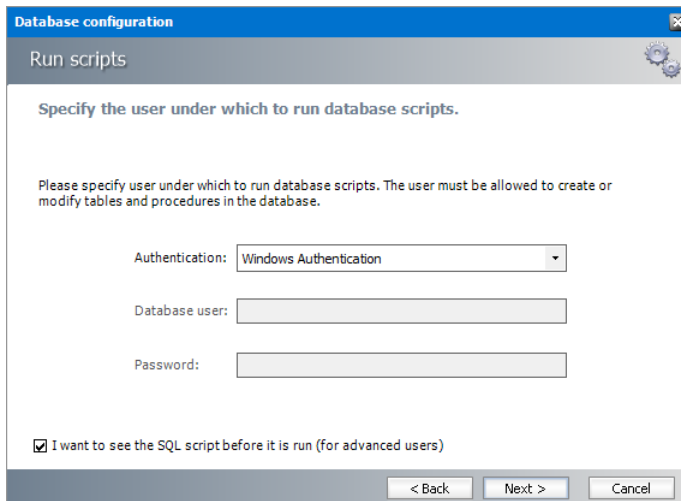
## Steps to install the Post Processing database

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



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

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



Enter the information as described below:

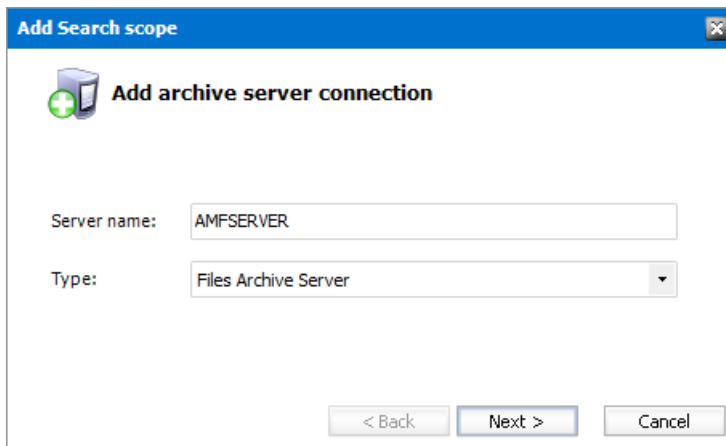
- a. **Authentication** - authentication type used for the database. Choose either **Windows authentication** or **SQL Server authentication**
  - b. **User name** - database login user name if *SQL Server authentication* is the selected as the authentication mode.
  - c. **Password** - password of the database user if *SQL Server authentication* is the selected as the authentication mode.
  - d. (optional) Check the **I want to review the SQL Scripts** check box to view the scripts.
4. Click **Next**. If you chose to view the SQL scripts then the *View SQL scripts* window opens. If you chose to view the Oracle scripts then the *View Oracle scripts* window opens. Click **Save Script** to save the script as a script file to a folder. Check the **Word wrap** check box to display long lines as multiple lines of text.
  5. Click **Next**. The *Run SQL scripts* window reopens with the scripts you have chosen to run.
  6. Click **Next**. When the status changes to *Scripts were run successfully*, click **Finish** to close the script installer. The *Scripts* section of the *Configuration* wizard displays the status and version of the scripts (the version of the scripts you install may differ from the version shown in the image below).




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

## Steps to configure Search Scopes

1. From the feature panel on the left in the *Configuration* wizard, click **Search** and select the **Search Scopes** tab.
2. Click **Add**. The *Add Search scope* window opens.



**Add Search scope**

 **Add archive server connection**

Server name:

Type:

< Back   Next >   Cancel

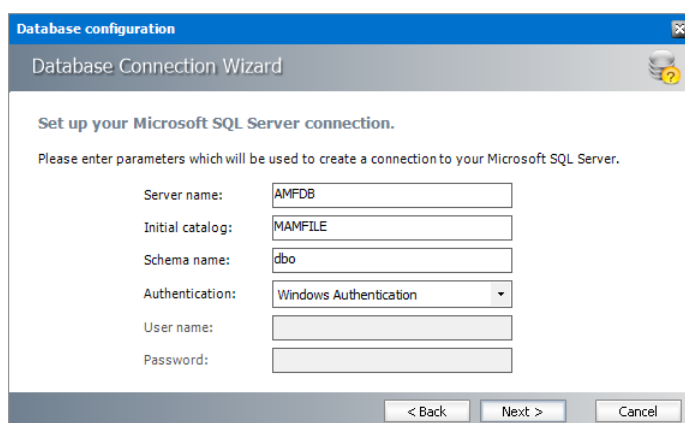
Enter the information and described below:

- a. **Server name** - name of the Archive Manager for Files server (eg. AMFSERVER).
- b. **Type** - Select **File Archive Server**.
3. Click **Next**. The *Configuration* window for the *Archive* database opens.
4. If the MAMFILE database already exists, click **Import**.

-or-

If the MAMFILE database does not exist yet, follow the steps below to configure the database:

- a. Click **Configure** to setup the Archive Manager for Files database. The *Database Connection Wizard* opens.
- b. Select either **Microsoft SQL Server** (for on-premise MS SQL Database Server or Azure SQL Database) or **Oracle** and click **Next**. The database connection information window opens for the selected database.



**Database configuration**

Database Connection Wizard

Set up your Microsoft SQL Server connection.

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

Server name:

Initial catalog:

Schema name:

Authentication:

User name:

Password:

< Back   Next >   Cancel

*For Microsoft SQL Server*

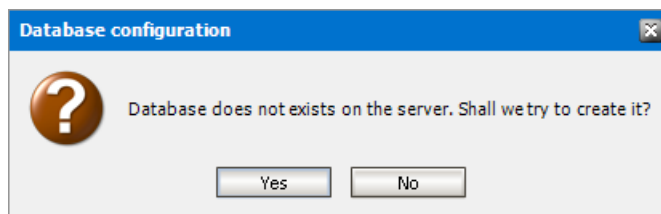
- **Server name** - name of the SQL server (eg. **AMFDB**)
- **Initial catalog** - name of the Archive Manager for Files database (e.g. **MAMFILE** which is the default name of the Archive Manager for Files database)
- **Schema name** - name of the SQL Schema (e.g. **dbo**)

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

For Oracle

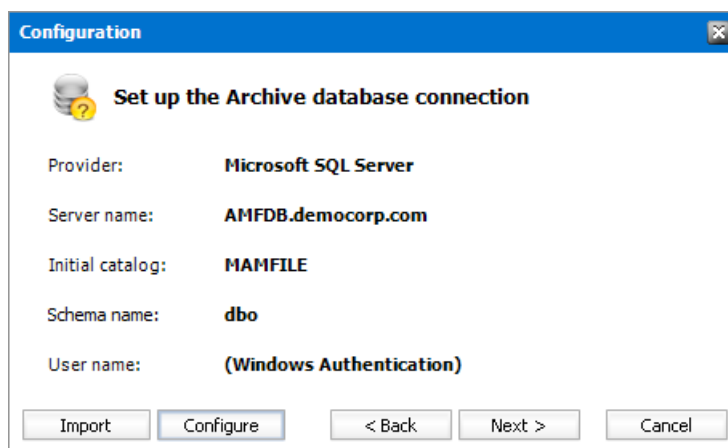
- **Oracle net name** - net service name that describes the network address of the HSM database in your `tnsnames.ora` file (eg. **AMFDB**)
- **Schema** - name of the Archive Manager for Files database (e.g. **MAMFILE** which is the default name of the Archive Manager for Files database)
- **User name** - database login user name
- **Password** - password of the database user

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



- d. If the database connection is setup successfully, the configuration confirmation window opens.
- e. Click **Finish** to close the *Database Connection* wizard.

5. The *Configuration* window for the *Archive* database reopens.

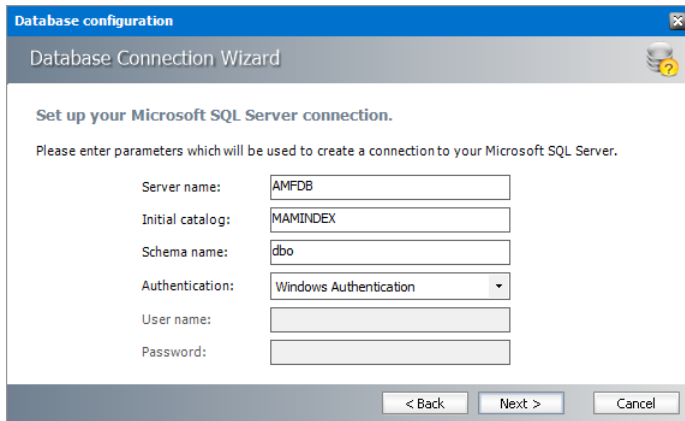


6. Click **Next**. The *Configuration* window for the *Index* database opens.
7. If the MAMINDEX database already exists, click **Import**.

-or-

If the MAMINDEX database does not exist, follow the steps below to configure the database:

- a. Click **Configure** to setup the Index database connection. The *Database Connection Wizard* opens.
- b. Select either **Microsoft SQL Server** or **Oracle** and click **Next**. The database connection information window opens for the selected database.



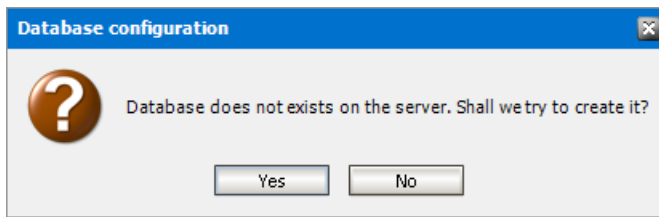
*For Microsoft SQL Server*

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

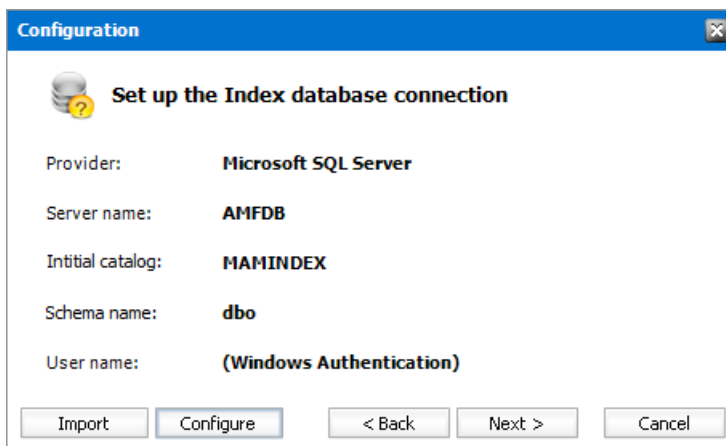
*For Oracle*

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

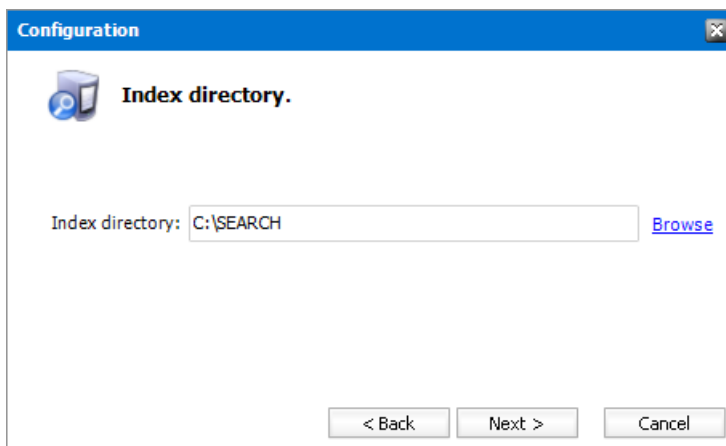




- d. If the database connection is setup successfully, the configuration confirmation window opens.
  - e. Click **Finish** to close the *Database Connection* wizard.
8. The *Configuration* window for the *Index* database reopens.

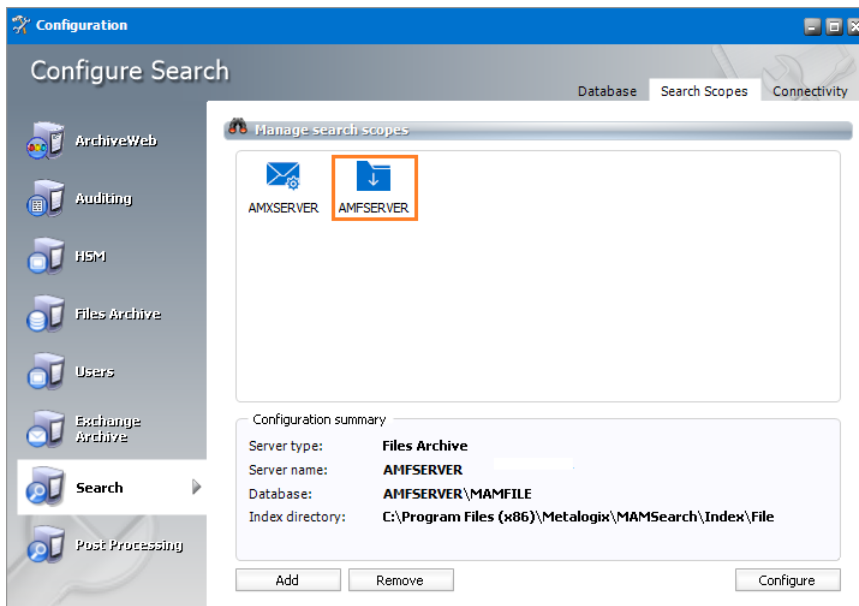


9. Click **Next**. The *Configuration* window for the *Index directory* opens



10. Click **Browse** to select or create a folder for the search index and then click **Next**. The *Apply the configuration changes* confirmation window opens.
11. Click **Finish**. The Archive server for **Server type = Files Archive** is added to the *Manage search scopes* section. Click the icon for the Archive server that you added, and verify the information in the *Configuration summary* section.

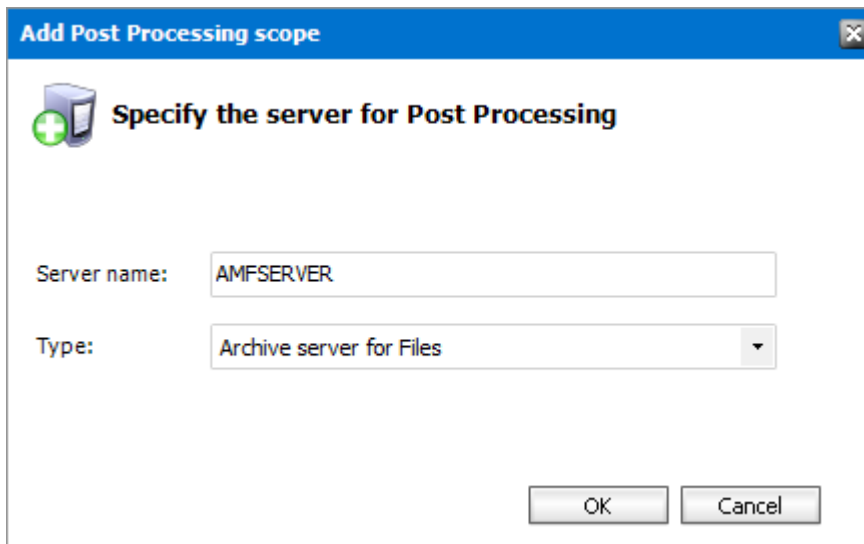
**i** **NOTE:** Search scopes for Archive Manager for Exchange and Archive Manager for Files are separate entities based on the **Server type**.



12. Close the *Configuration* wizard.

## Steps to configure Post Processing Scopes

1. From the feature panel on the left in the *Configuration* wizard, click **Post Processing** and select the **Post Processing Scopes** tab.
2. Click **Add**. The *Add Post Processing scope* window opens.



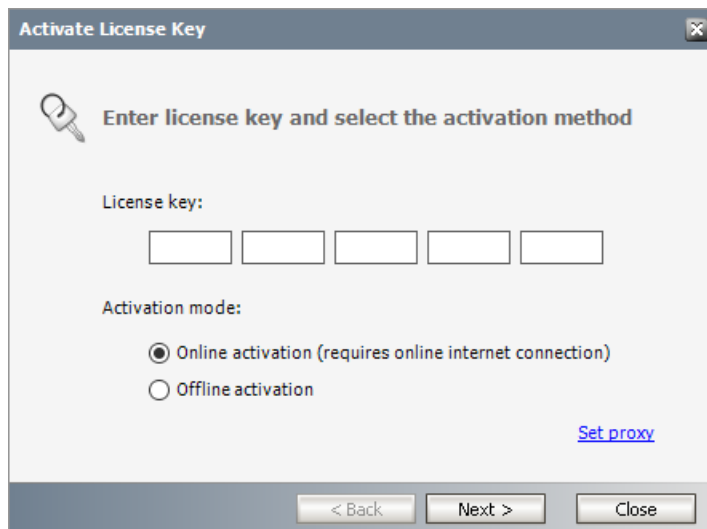
Enter the information and described below:

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

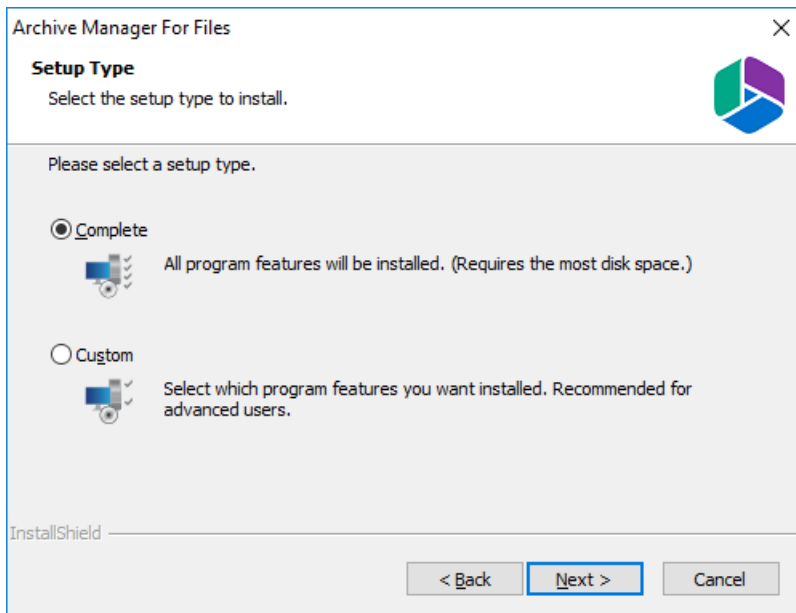
# Install Archive Manager for Files

When HSM is installed and configured, you can install Archive Manager for Files. To install Archive Manager for Files:

1. Login to the server with the credentials of the superuser (eg. **democorp\mamadmin**)
2. Run the **Metalogix Archive Manager Installation Package** to extract the files to a local folder.
3. Close the integrated installer wizard which starts automatically.
4. Run the Archive Manager Search setup. The default path is `C:\Metalogix\Archive Manager Installation Package\Files\Archive Manager for Files Setup.exe`
5. A prerequisite check occurs and missing requirements if any are displayed. Click **Install** to ensure all missing requirements are installed.
6. The *Welcome* window of the Archive Manager for Exchange installer opens.
7. Click **Next**. The *License Agreement* window opens.
8. Click **Yes** to accept the license. The *License Key* window opens. Click **Print** if you wish to print the license agreement.

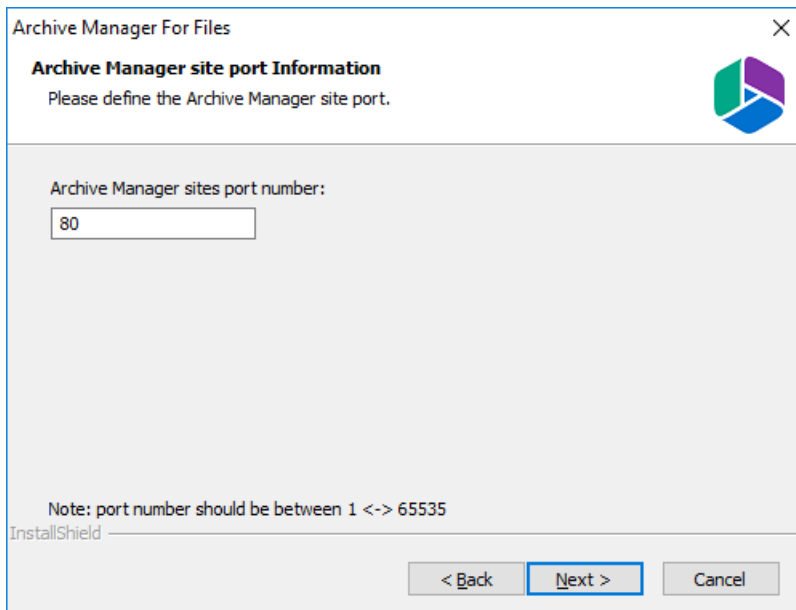


9. If you are connected to the internet, select **Online activation** or see [License Activation](#) for more options. Click **Next**. When your license is activated, you will see a confirmation message and the license details. Click **Finish** to close the **Activate License Key** dialog.
10. Click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

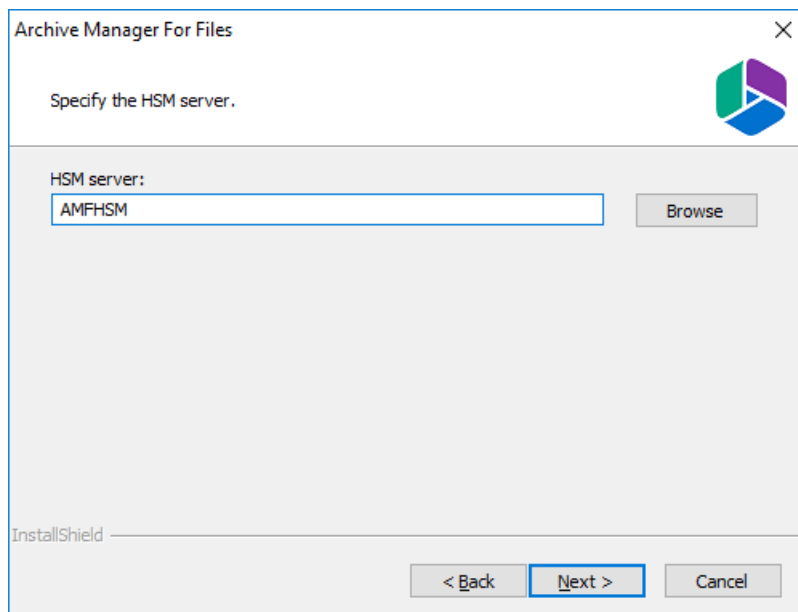


Select the **Complete** option. The **Custom** option allows advanced users to manage individual features of the product like Auditing or ArchiveWeb which can be installed remotely.

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

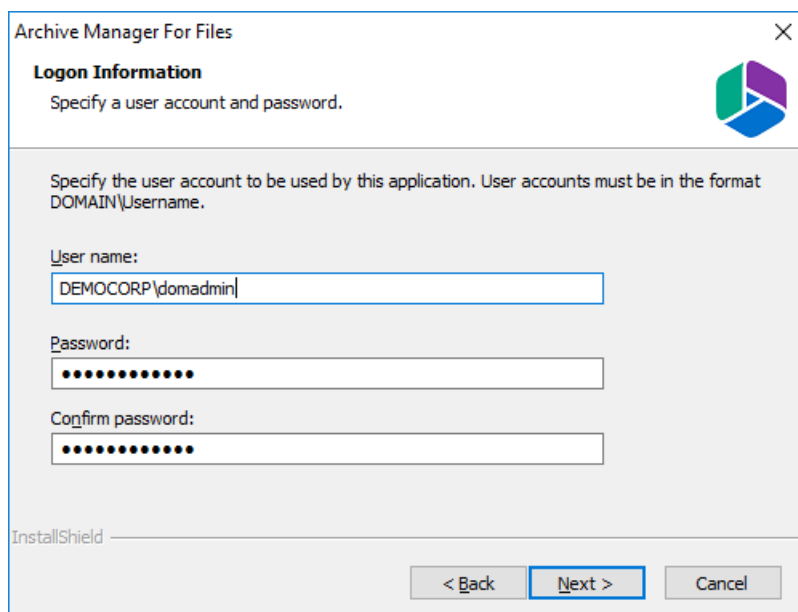


12. Keep the default port 80 unless there are other application co-located on this server that also use port 80. Click **Next** and the *Select HSM server* window opens.



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

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



14. In the **User name** field, specify the superuser name (eg. **democorp\mamadmin**) and **Password**. Enter the password again in the **Confirm password** field. This user account must have the appropriate DCOM rights on the fileserver to launch COM objects and must have full access to files and folders which are meant to be archived. We recommend using a local administrator account. In case that Archive Manager will be used to archive files on remote servers (through shared drives), the user running the Archive Manager services must be granted full rights to the remote folders.
15. Click **Next**. The *Firewall Settings* window opens. Select the **Allow programs to communicate through Windows Firewall** check box. Metalogix Archive Manager for Exchange features will be then able to communicate through the firewall.

16. Click **Next**. The *Ready to Install the Program* window opens.
17. Click **Install** to start the installation. When the installation completes, the *InstallShield Wizard Complete* window opens.
18. Click **Finish** to close the wizard.

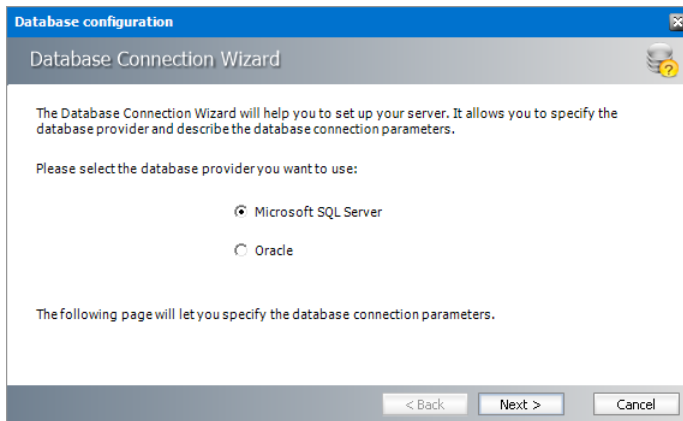
# Configure Archive Manager

In this topic:

- [Steps to configure the Archive Manager database connection](#)
- [Steps to install the Archive Manager database](#)

## Steps to configure the Archive Manager database connection

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



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

*For Microsoft SQL Server*

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

*For Oracle*

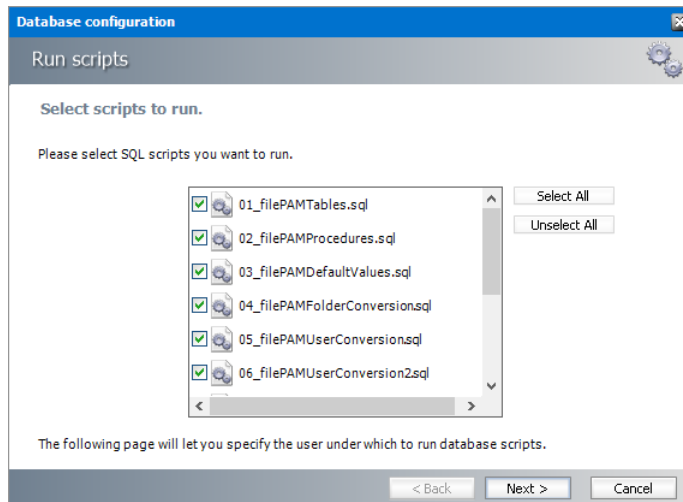
- a. **Oracle net name** - net service name that describes the network address of the HSM database in your `tnsnames.ora` file (eg. **AMXDB**)
  - b. **Schema** - name of the HSM database (e.g. **MAMEXCH** which is the default name of the Archive Manager for Exchange database)
  - c. **User name** -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

7. If the database connection is setup successfully, the confirmation window opens.
8. Click **Finish** to close the *Database Connection* wizard. The connection information is displayed in the *Database connection* section.

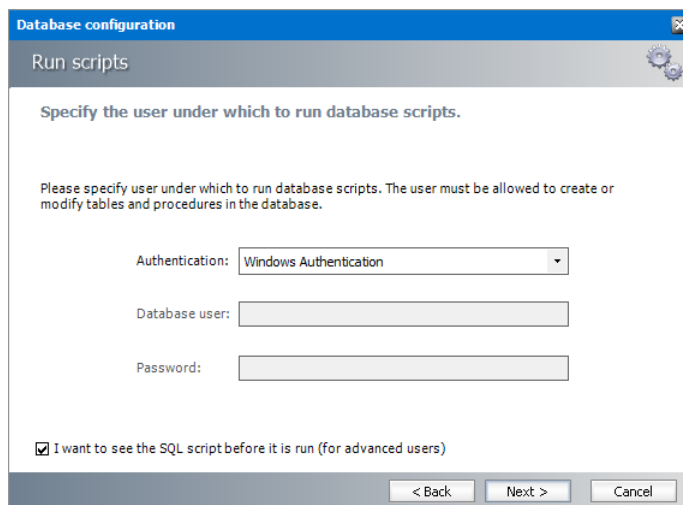


## Steps to install the Archive Manager database

1. From the feature panel on the left in the *Configuration* wizard, 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.



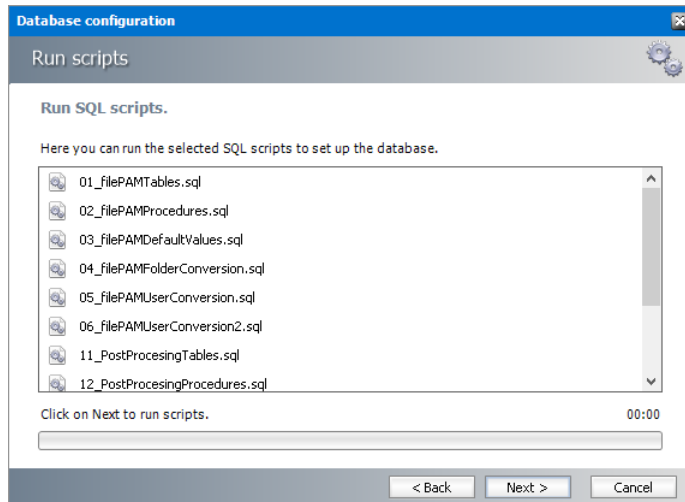
3. Click **Select All** to select all check boxes. Then click **Next**. The *Run Scripts* authentication window opens.



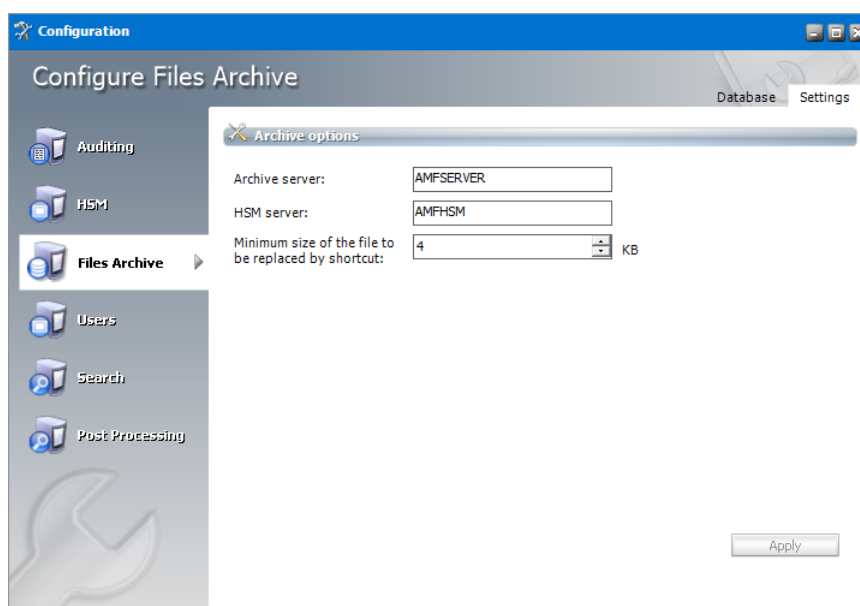
Enter the information as described below:

- Authentication** - authentication type used for the database. Choose either **Windows authentication** or **SQL Server authentication**
- User name** - database login user name if *SQL Server authentication* is the selected as the authentication mode.
- Password** - password of the database user if *SQL Server authentication* is the selected as the authentication mode.
- (optional) Check the **I want to review the SQL Scripts** check box to view the scripts.

4. Click **Next**. If you chose to view the SQL scripts then the *View SQL scripts* window opens. If you chose to view the Oracle scripts then the *View Oracle scripts* window opens. Click **Save Script** to save the script as a script file to a folder. Check the **Word wrap** check box to display long lines as multiple lines of text.
5. Click **Next**. The *Run SQL scripts* window reopens with the scripts you have chosen to run.



6. Click **Next**. When the status changes to *Scripts were run successfully*, click **Finish** to close the script installer. The *Scripts* section of the *Configuration* wizard displays the status and version of the scripts.
7. Click the **Settings** tab. Information presented here is filled in by default and configuration is necessary only for special purposes as described below:
  - a. **Archive server** – name of the machine where Archive Manager for Files is installed.
  - b. **HSM server** – indicates the HSM server.
  - c. **Minimum size of the file to be replaced by shortcut** – identifies the minimum size of a file, which can be replaced with a shortcut after archiving.



8. Close the *Configuration* wizard.

---

# Addendum

In this chapter:

- [Remote HSM Server](#)
- [Troubleshooting: Adobe reader X is not able to open archived PDFs](#)
- [License Activation](#)

## Remote HSM Server

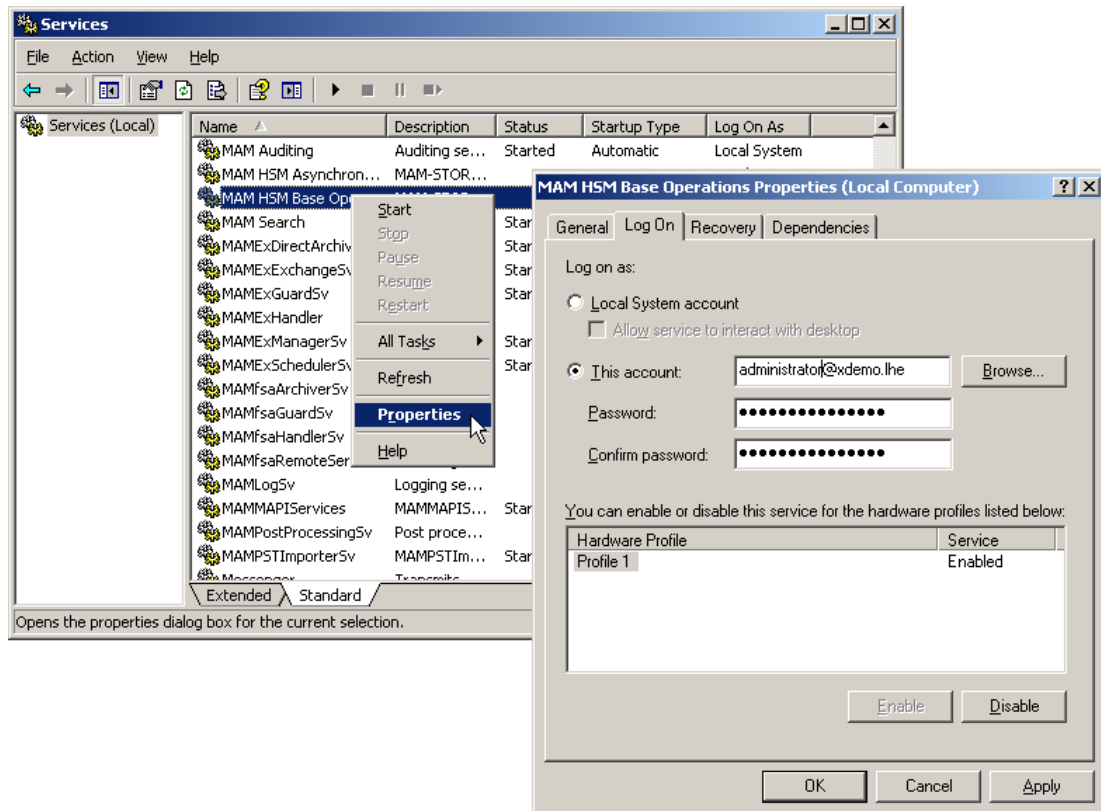
In case of a remote HSM Server, i.e. if the HSM Server is installed on a separate machine, it is necessary that:

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

On the HSM server, follow these steps:

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

Finally click **OK**.



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

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

and after that the IIS have to be reset.

On the HSM Server follow these steps:

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

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

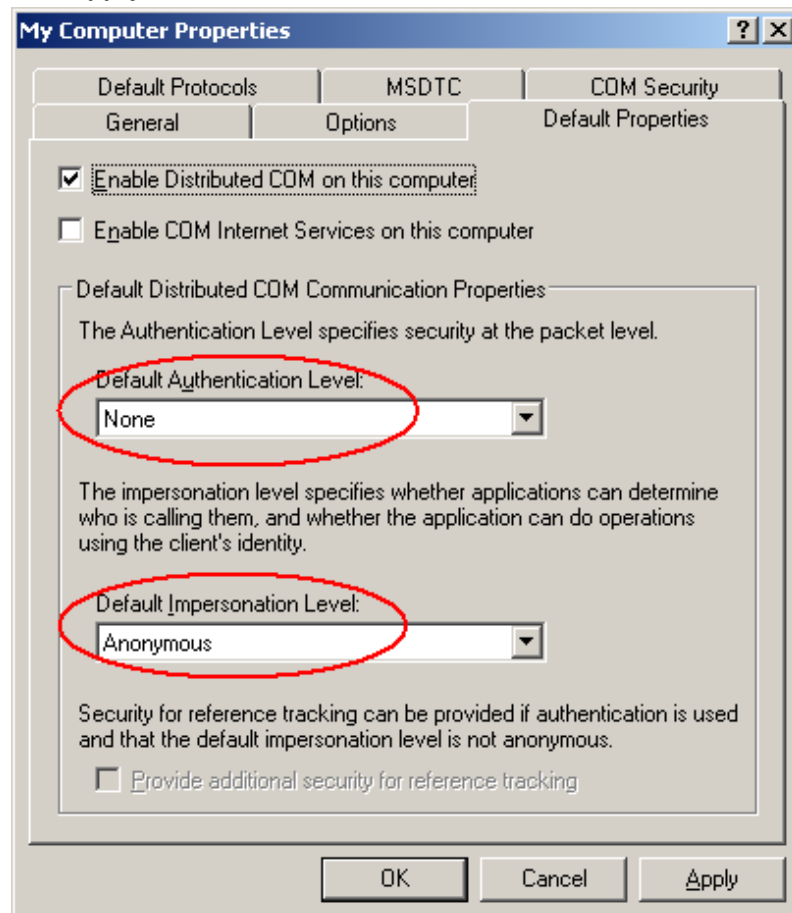
```
comAuthenticationLevel="None" comImpersonationLevel="Anonymous"
```

The entry then looks as follows:

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

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

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



7. Finally reset IIS.

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

Problem description:

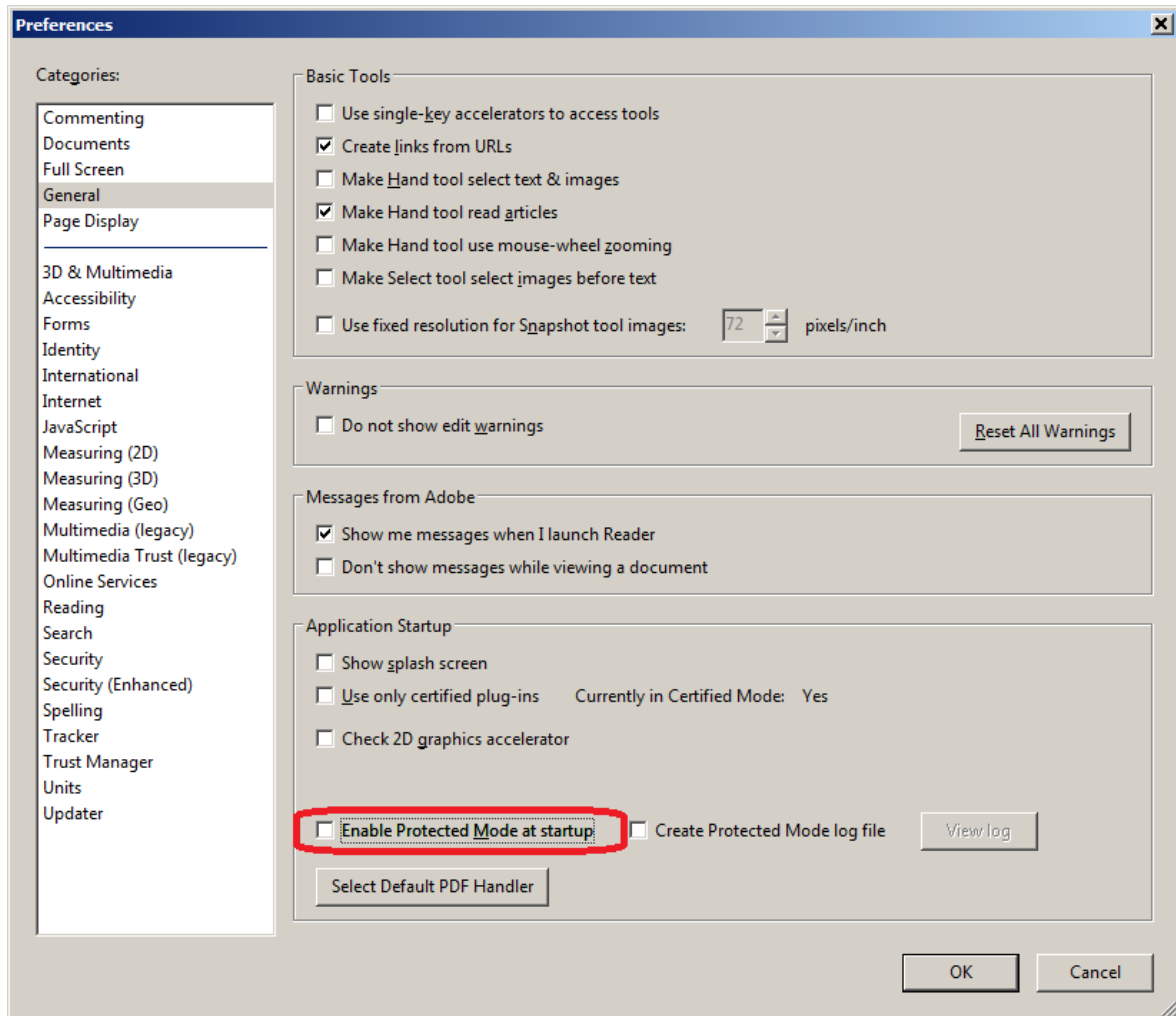
PDF files changed to shortcuts by Archive Manager are not retrievable by Adobe Reader X. The files could be opened without any obstacle if an older version of Adobe or any other PDF viewer is used.

Solution:

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

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

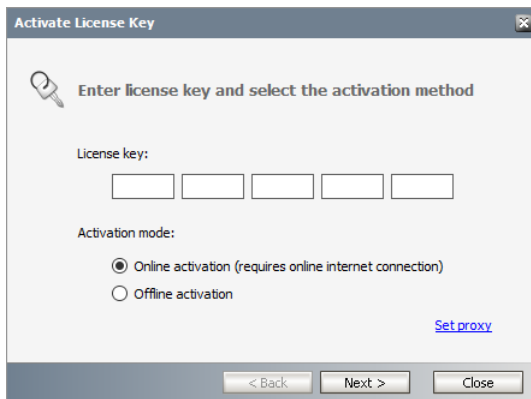
If you are having the problem described above, deactivate protected mode manually in Adobe Reader by choosing **Edit > Preferences > General** tab and unchecking **Enable Protected Mode** on startup.



## License Activation

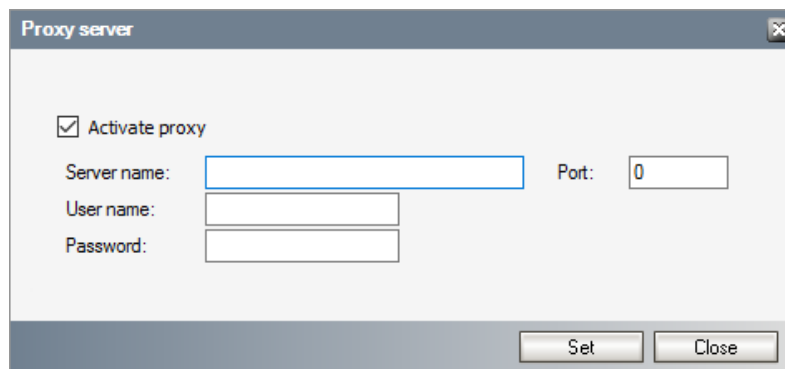
### Online activation

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



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

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



- a. Select **Activate Proxy** and specify the proxy information as described below:
- b. **Server Name** - enter the name of your proxy server.
- c. **Port** - enter the port number of the proxy server.
- d. **User name** and **Password** - Specify the credentials of the user who is authorized to access the proxy server.
- e. Click **Set** to save the information, or click **Close** to return to the *License Key Information* dialog.

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

## Offline activation

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

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



- a. Select from the two options described below:

The screenshot shows a window titled "Activate License Key" with a close button in the top right. Inside, there's a gear icon and the heading "Generate Activation Request". Below this, a paragraph explains the offline activation process: "To activate your product in offline mode, copy the Activation Request text or save it to a file, then visit the Metalogix web site and follow the instructions there to generate the Activation Response. After you got the Activation Response, click 'Next'." There are two options: "Activation Request:" with a text box containing a long alphanumeric string and a "Save to file" link, and "Activation URL:" with the text "https://support.quest.com/offline-activation" and a "Go" link. At the bottom are three buttons: "< Back", "Next >", and "Close".

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

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

#### 4. Step 2: Submit collected data

- a. Click **Go**. The **Metalogix License Activation** web page appears.
- b. Follow the instructions to get the **Activation Key file** (with the file extension DAT) is made available for download. Save this file to a location of your choice.

#### 5. Step 3: Paste Activation Response

The screenshot shows a window titled "Activate License Key" with a close button in the top right. Inside, there's a sphere icon and the heading "Enter your Activation Response". Below this, a paragraph explains the process: "To activate your product offline mode, paste the Activation Response or load it from file saved on the Activation web page. If you do not have the Activation Response go to previous wizard page and follow the instructions there. Once entered the Activation Response, click 'Next'." There are two options: "Activation Response:" with a text box containing a long alphanumeric string and a "Load from file" link, and "Activation URL:" with the text "https://support.quest.com/offline-activation" and a "Go" link. At the bottom are three buttons: "< Back", "Next >", and "Close".

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

#### 6. Step 4: Activate offline

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

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## About Us

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

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## Technical Support Resources

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

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

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