

Metalogix® Archive Manager for Exchange 8.7

Common Upgrade Guide



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Quest Software Inc.
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Legend

-  **CAUTION:** A caution icon indicates potential damage to hardware or loss of data if instructions are not followed.
-  **IMPORTANT, NOTE, TIP, MOBILE OR VIDEO:** An information icon indicates supporting information.

Metalogix[®] Archive Manager for Exchange

Updated February 2023

Version 8.7

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About this document

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

Steps to download the install media

1. From your browser, navigate to the <https://www.quest.com/products/metalogix-archive-manager-for-exchange> page
or
navigate to the <http://www.quest.com/trials> page. Locate the product Metalogix Archive Manager for Exchange.
2. Click the **Download Free Trial** button.
3. Fill the *Download Your Free Trial* registration form and click **Download Trial**. The file download page appears.
4. Download the install media zip file.
5. The the trial license key is specified in the email that is sent to you.
6. Ensure that the files are available locally on the computer on which you are planning to install the Metalogix Archive Manager for Exchange components.

Archive Manager for Exchange

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

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

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

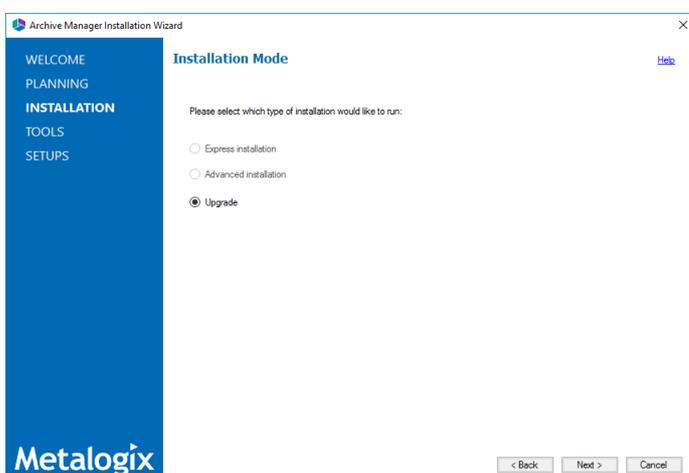
- automatically, with the Archive Manager installer. This method automatically upgrades Archive Manager for Exchange on the same server where it was previously installed.
- manually, using the *Archive Manager for Exchange Setup.exe* file. This method manually upgrades Archive Manager for Exchange on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

In this chapter:

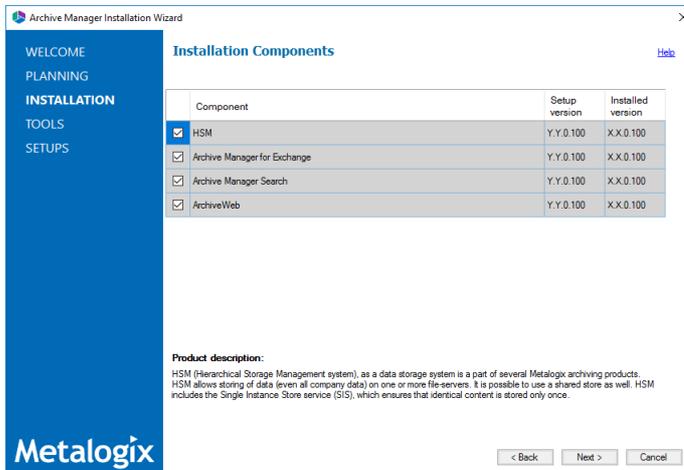
- [Steps to automatically upgrade with the Archive Manager installer](#)
- [Steps to manually upgrade with the Archive Manager for Exchange installer](#)
- [Steps to manually upgrade the Archive Manager for Exchange database](#)

Steps to automatically upgrade with the unified product installer

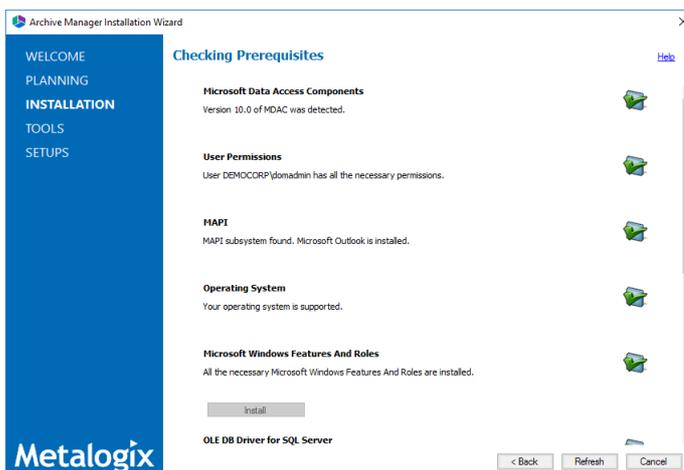
1. Download the latest Metalogix Archive Manager for Exchange install media. For instructions see [Steps to download the install media](#).
2. Run the **Metalogix Archive Manager Installation Package** to extract the files to a local folder.
3. The wizard checks whether the Metalogix Archive Manager for Exchange installation requires an upgrade. If it does, the **Upgrade** option will be selected automatically.



- Click **Next**. The **Installation Components** page appears with a list of components that are already installed on the server. Select the components you want to upgrade. You should upgrade all the components to ensure the application features work as expected.

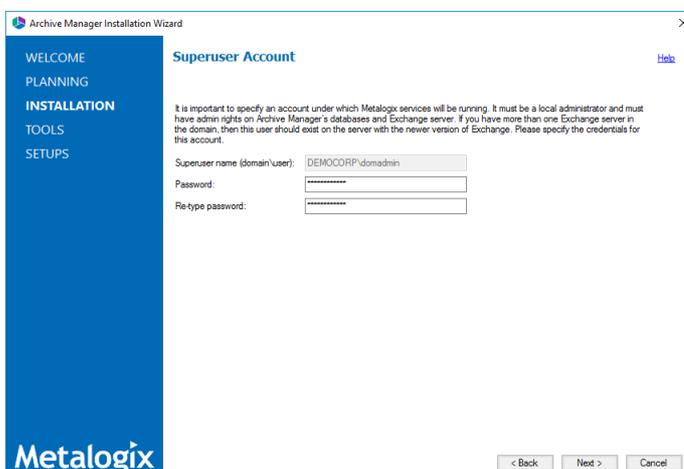


- Click **Upgrade**. The **Checking Prerequisites** page appears. A check is conducted to find out if a new prerequisite is needed for the upgrade.

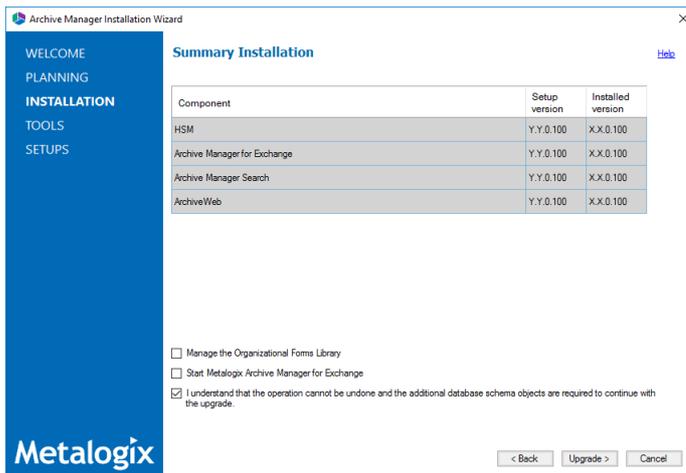


- Click **Next**. The **Superuser Account** page appears. Specify and confirm the password.

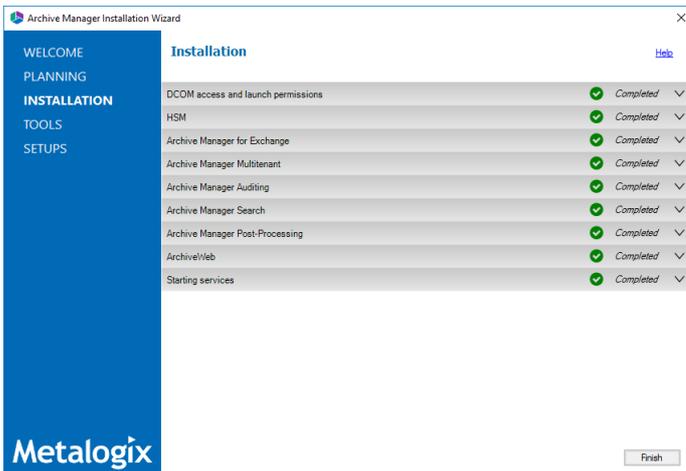
NOTE: The **Superuser name** cannot be changed.



7. Click **Next**. The **Summary Installation** page appears. This page presents information about component versions that will be installed after the update (**Setup version** column), and versions that are currently installed (**Installed version** column).
 - a. Select the check box **Start Metalogix Archive Manager for Exchange** to open the Archive Manager for Exchange Administration Center (AMAC).
 - b. Select the check box **I understand that the operation cannot be undone...** to confirm that you have acknowledged the upgrade. When the check box is checked, the **Upgrade** button is activated and you can proceed with the upgrade.



8. Click **Upgrade** to start the upgrade. Click **Back** to return to the previous page or click **Cancel** to exit the upgrade wizard. The upgrade progress for each component is displayed and the operation is confirmed. If the upgrade wizard detects that one or more features selected for upgrade are missing or damaged, the maintenance wizard for the feature will appear. Select the **Repair** option and complete the steps in the wizard to reinstall the feature.

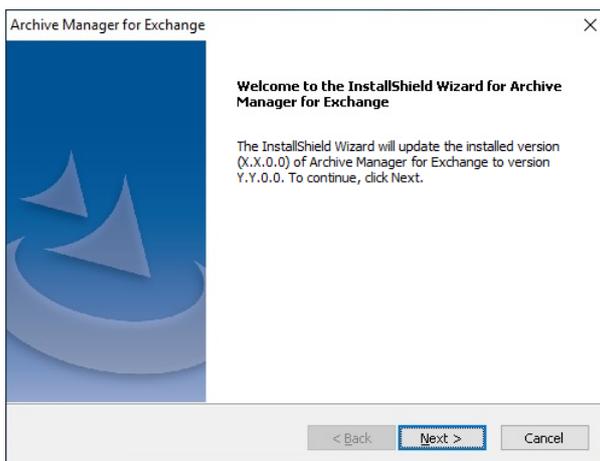


9. Click **Finish** to close the wizard when all the components are upgraded.

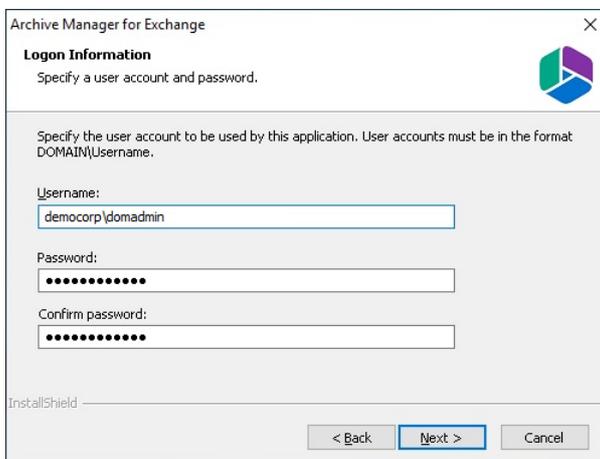
Steps to manually upgrade with the Archive Manager for Exchange installer

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

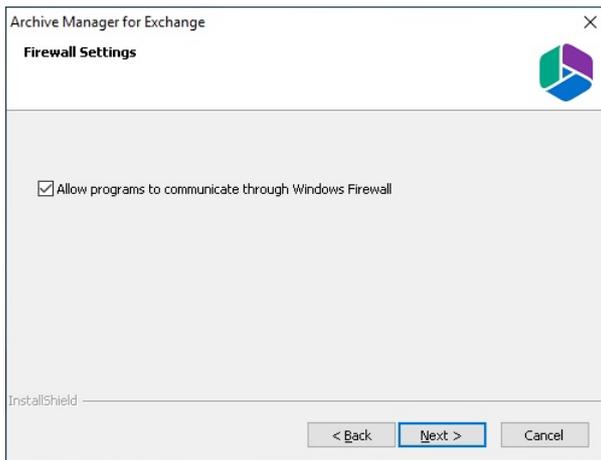
i | **NOTE:** A prerequisite check occurs and missing requirements if any are displayed. Install the prerequisites.



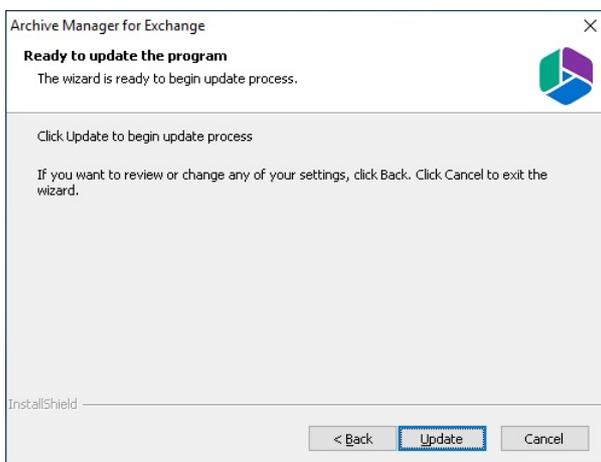
2. Click **Next**. The *Logon Information* window opens.



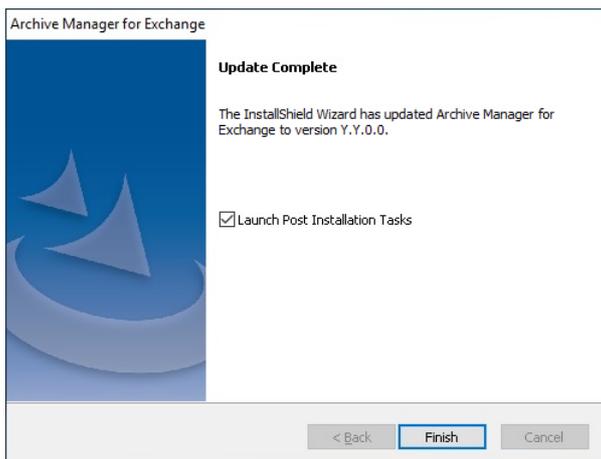
3. Click **Next**. The *Firewall Settings* window opens. Select the check box to allow communications through server firewalls. By default, the **Allow programs to communicate through Windows Firewall** is checked. This will allow critical services to communicate with the Archive Manager for Exchange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



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



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



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

Steps to manually upgrade the Archive Manager for Exchange database

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

1. From the feature panel on the left in the *Archive Manager Configuration Tool*, click **Exchange Archive** and select the **Database** tab.
2. Verify that the database connection information is as expected. Then click **Run Scripts**. The *Run Scripts* selection window opens.
3. Click **Select All** to select all check boxes. Click **Next**. The *View SQL scripts* window opens.
4. Click **Next**. The *Run Scripts* authentication window opens. Enter the information as described below:
 - a. **Authentication** - authentication type used for the database. Choose either **Windows authentication** or **SQL Server authentication**
 - a. **Database user** - database login username if *SQL Server authentication* is the selected as the authentication mode.
 - b. **Password** - password of the database user if *SQL Server authentication* is the selected as the authentication mode.
 - c. (optional) Check the **I want to review the SQL Scripts** check box to view the scripts.
5. Click **Next**. If you chose to view the SQL scripts then the *View SQL scripts* window opens. If you chose to view the Oracle scripts then the *View Oracle scripts* window opens

Click **Save Script** to save the script as a script file to a folder. Check the **Word wrap** check box to display long lines as multiple lines of text.
6. Click **Next**. The *Run SQL scripts* window reopens with the scripts you have chosen to run.
7. Click **Next**. When the status changes to *Scripts were run successfully*, click **Finish** to close the script installer. The *Scripts* section of the **Database** tab displays the status and updated version of the scripts.

For Auditing

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

For Users

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

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

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

In this chapter:

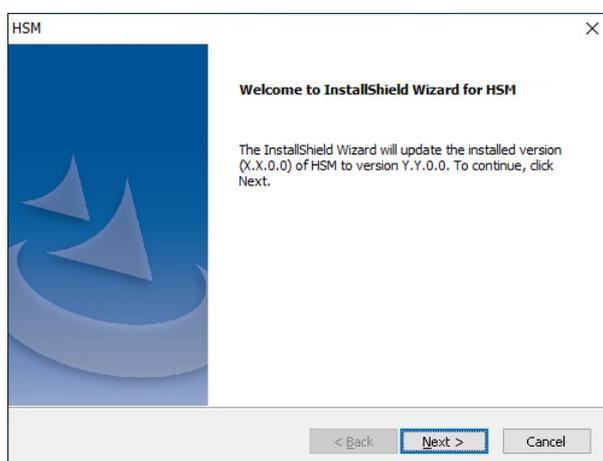
- [Steps to manually upgrade with the HSM installer](#)
- [Steps to manually upgrade the HSM database](#)

Steps to manually upgrade with the HSM installer

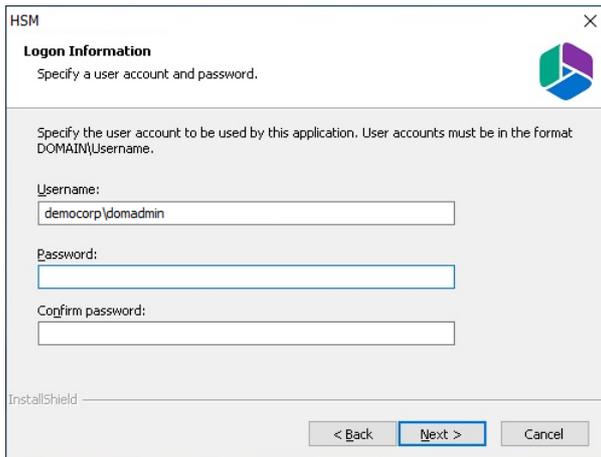
1. Log in to the HSM server with the credentials of the **superuser** (eg. **democorp\domadmin**)
2. Download the installation media. For more information see [Steps to download the install media](#).
3. Run the **Metalogix Archive Manager Installation Package** to extract the files to a local folder.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

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

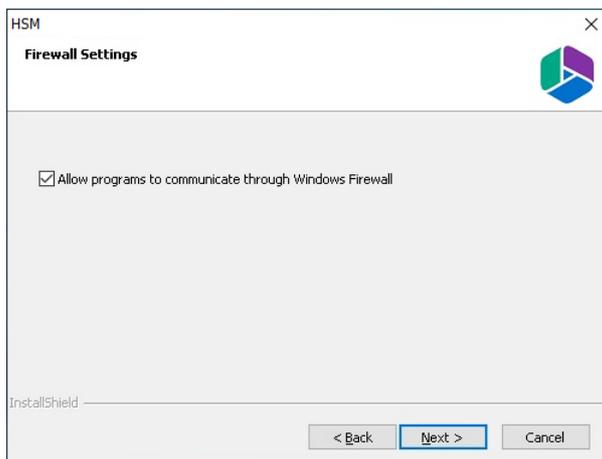
6. The *Welcome* window of the HSM installer opens.



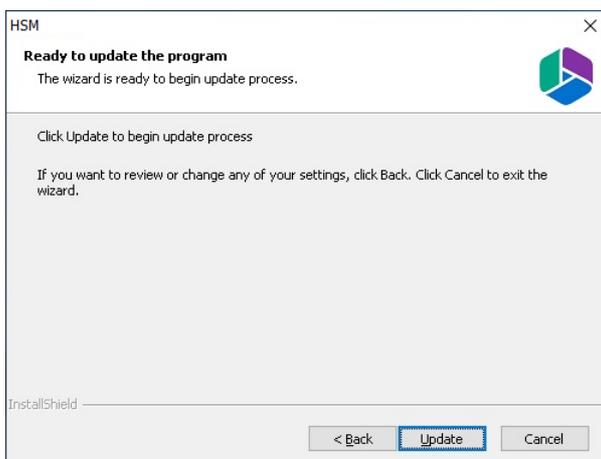
7. Click **Next**. The *Logon Information* window opens.



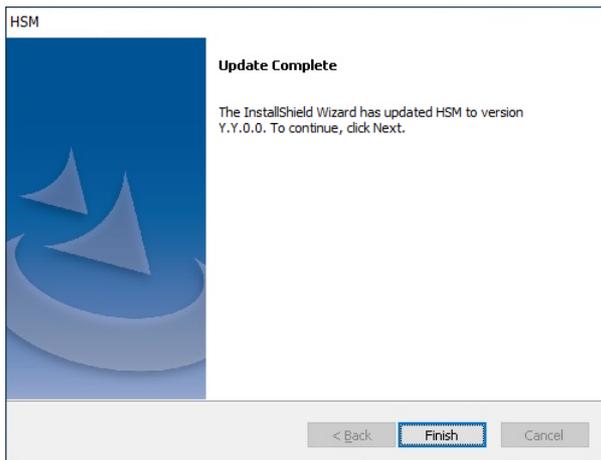
8. Click **Next**. The **Firewall Settings** window opens if the Windows Firewall is active on your computer. By default, the **Allow programs to communicate through Windows Firewall** is checked. This will allow critical services to communicate with the HSM service. If you clear the check box, critical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



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



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



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

Steps to manually upgrade the HSM database

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

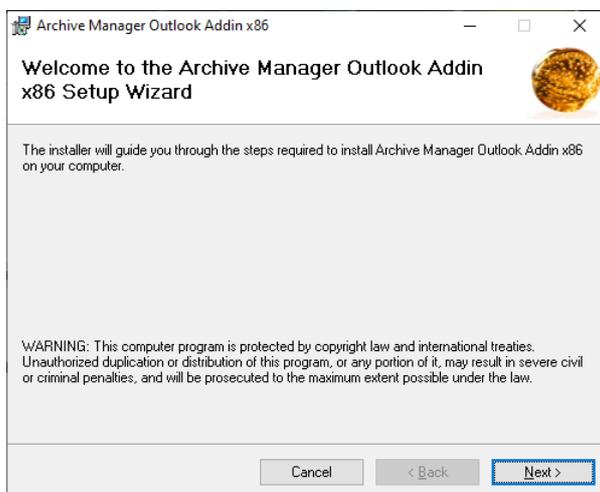
1. From the feature panel on the left in the *Archive Manager Configuration Tool*, click **HSM** and select the **Database** tab.
2. Verify that the database connection information is as expected. Then click **Run Scripts**. The *Run Scripts* selection window opens.
3. Click **Select All** to select all check boxes. Click **Next**. The *View SQL scripts* window opens.
4. Click **Next**. The *Run Scripts* authentication window opens. Enter the information as described below:
 - a. **Authentication** - authentication type used for the database. Choose either **Windows authentication** or **SQL Server authentication**
 - a. **Database user** - database login username if *SQL Server authentication* is the selected as the authentication mode.
 - b. **Password** - password of the database user if *SQL Server authentication* is the selected as the authentication mode.
 - c. (optional) Check the **I want to review the SQL Scripts** check box to view the scripts.
5. Click **Next**. If you chose to view the SQL scripts then the *View SQL scripts* window opens. If you chose to view the Oracle scripts then the *View Oracle scripts* window opens
Click **Save Script** to save the script as a script file to a folder. Check the **Word wrap** check box to display long lines as multiple lines of text.
6. Click **Next**. The *Run SQL scripts* window reopens with the scripts you have chosen to run.
7. Click **Next**. When the status changes to *Scripts were run successfully*, click **Finish** to close the script installer. The *Scripts* section of the **Database** tab displays the status and updated version of the scripts.

Outlook Addin

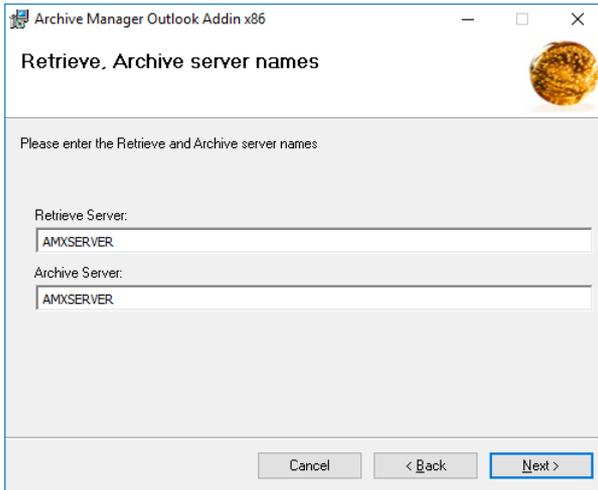
Steps to upgrade

1. Login to the client computer with the enterprise administrator credentials.
2. Close all running applications. Open **Task Manager** and verify that the process *Outlook.exe* is not running.
3. Download and unzip the installation package to a suitable media folder. For more information see [Steps to download the install media](#).
4. Run the installer. The default location is `C:\Metalogix\Archive Manager Installation Package\Exchange\Addin\Archive Manager Outlook Addin x86 Setup.msi` or `Archive Manager Outlook Addin x64 Setup.msi`

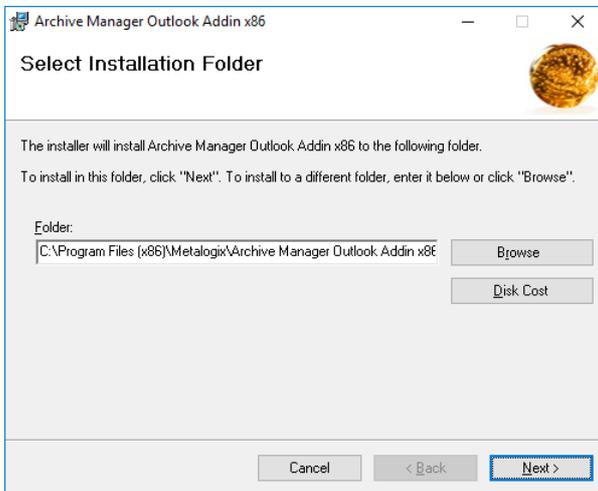
i | **NOTE:** Necessary prerequisites will be checked. If any prerequisite must be installed, the setup will indicate the prerequisites. Download and install the software.



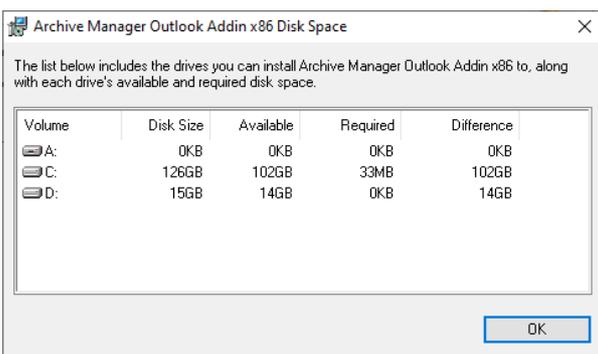
5. Click **Next**. The *Retrieve, Archive server names* window opens. Enter the names of Archive Manager Retrieve and Archive servers. If Archive and Retrieve Servers are the same as in a standalone deployment, enter the same name in both text boxes. If you do not know this names please contact your system administrator.



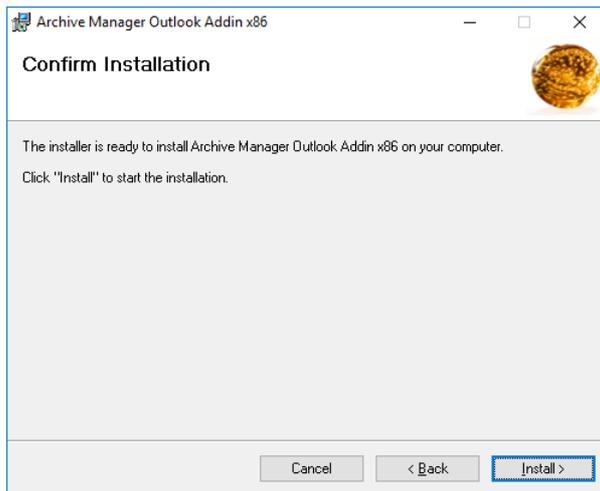
6. Click **Next**. The *Select Installation Folder* window opens. Accept the default folder path or click **Browse** to select a different folder.



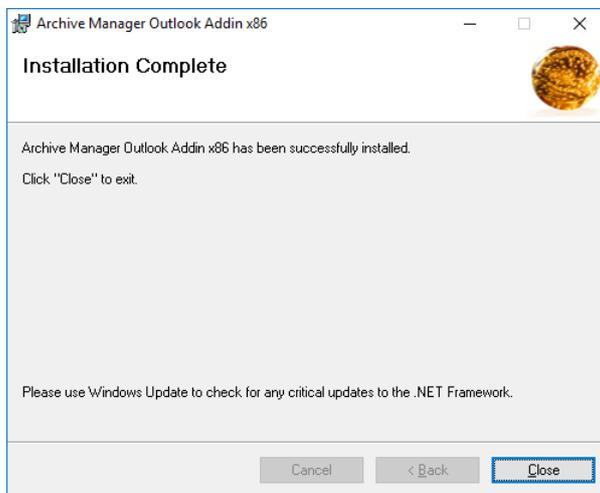
7. You can determine the space requirement and availability by clicking **Disk Cost**.



8. Click **Next**. The *Confirm Installation* window opens.

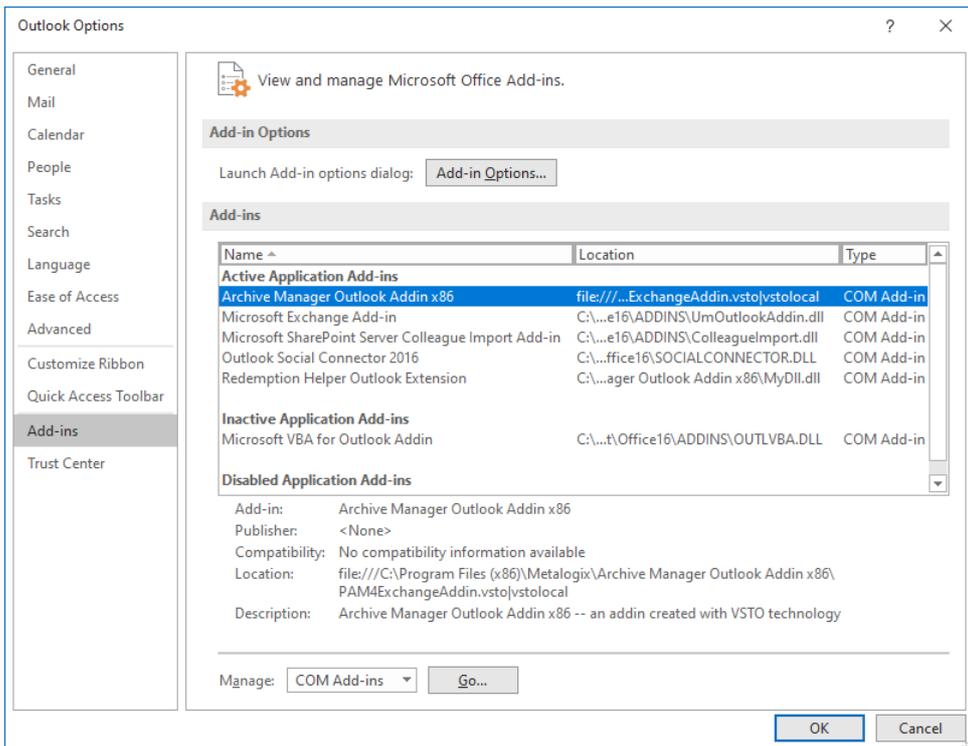


9. Click **Install**.



10. Click **Close**.

11. Open the Outlook client. Click **File > Options** to open the the *Outlook Options* window. Then click **Add-ins** and verify that the Archive Manager Outlook Addin is listed.

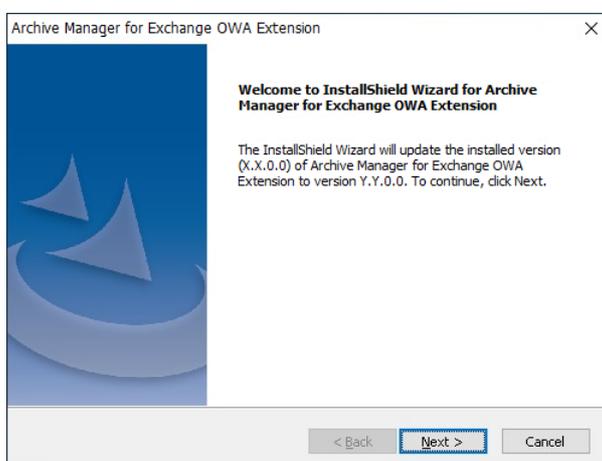


12. Click **OK** to close the *Outlook Options* window.

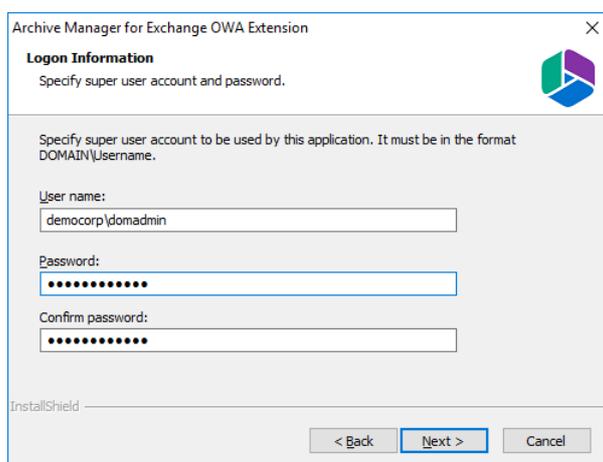
OWA Extension

Steps to upgrade

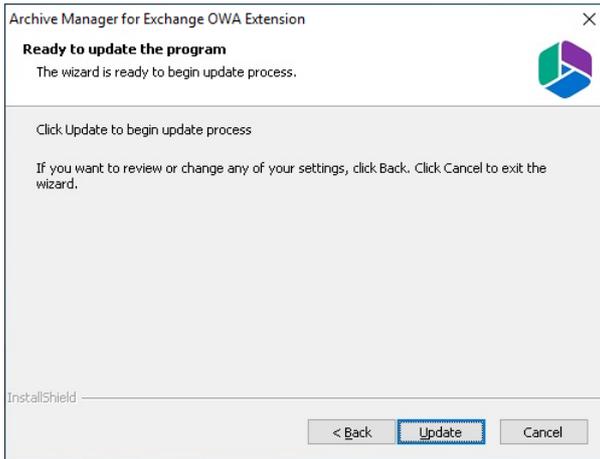
1. Download and unzip the installation package to a suitable media folder. For more information see [Steps to download the install media](#).
2. Run the OWA Extension installer. The default location is `C:\Metalogix\Archive Manager Installation Package\OWA Extension\Archive Manager OWA Extension Setup.exe`. The *Welcome* window opens.



3. Click **Next**. The *Logon Information* window opens. Verify that the superuser **User name** is the same. Then re-enter the **Password** and **Confirm Password**. You can change the credentials if you want.

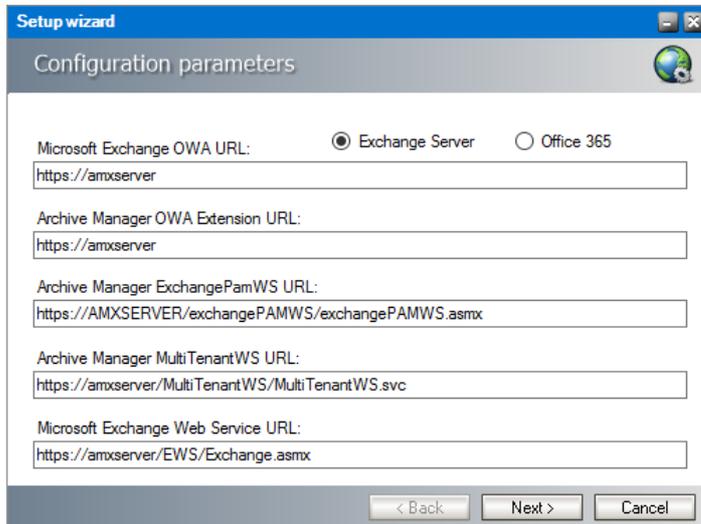


4. Click **Next**. The *Ready to update the program* window opens. If you want to review or change the wizard settings, click the **Back** button. To exit the wizard click **Cancel**. When the upgrade completes the *Update Complete* window opens.



5. Click **Upgrade**. The *Configuration parameters* window opens. Select either **Exchange Server** or **Office 365**. The default exchange server selection and property values may be different. Please review and revise the values as described below.

For Exchange Server:



Microsoft Exchange OWA URL - URL of the Microsoft Exchange server.

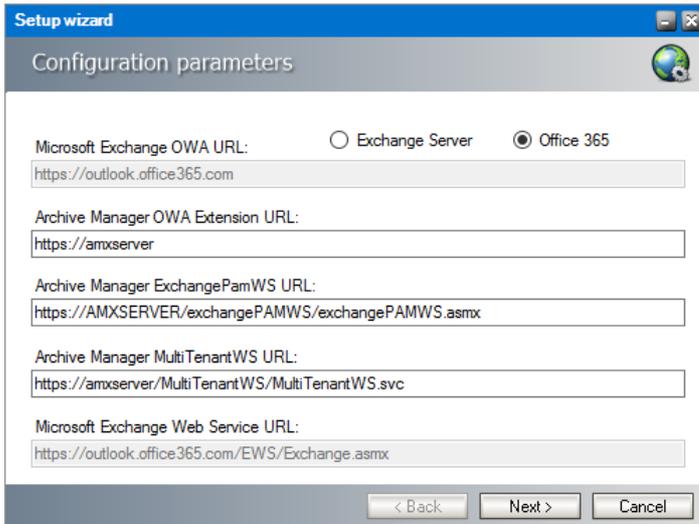
Archive Manager OWA Extension URL - URL of the server where the OWA extension is installed.

Archive Manager ExchangePamWS URL - URL for the ExchangePamWS service. This service is installed on the Archive Manager server.

Archive Manager Multi TenantWS URL - URL of the MultiTenantWS service. This service is installed on the Archive Manager server.

Microsoft Exchange Web Service URL - URL of the Exchange web service in the format `https://<exchange-server>/ews/exchange.asmx`. The Exchange Web Service is a set of web services to access the mailboxes on Exchange Server. This web service is normally installed on Exchange Servers with the **CAS** role.

For Office 365:



Microsoft Exchange OWA URL - read only property. Default value is `https://outlook.office365.com`

Archive Manager OWA Extension URL - the URL used to access OWA from the internet. If you use multiple URLs to access OWA, please use the one which is accessible to most of the users.

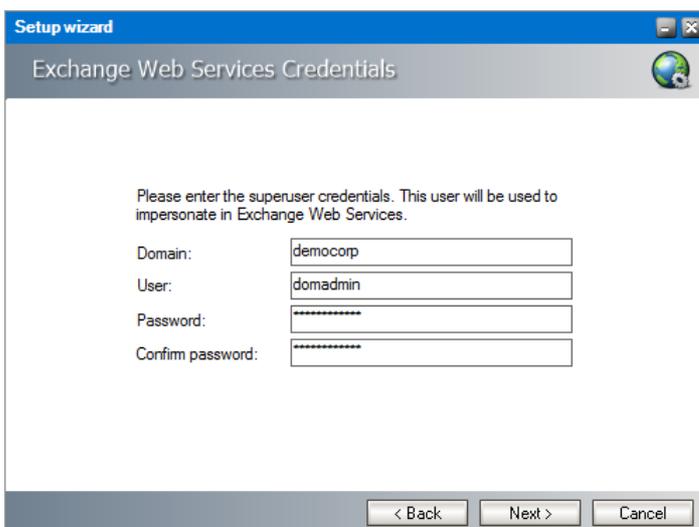
Archive Manager ExchangePamWS URL - URL for the ExchangePamWS service. This service is installed on the Archive Manager server.

Archive Manager Multi TenantWS URL - URL of the MultiTenantWS service. This service is installed on the Archive Manager server.

Microsoft Exchange Web service URL - read only property. Default value is `https://outlook.office365.com/EWS/Exchange.asmx`

6. Click **Next**. **Exchange Web Services Credentials** window fill in the credentials of the super-user which runs the Archive Manager services. It was specified during the installation of the Archive Manager.

For Exchange Server:



Enter the properties as described below:

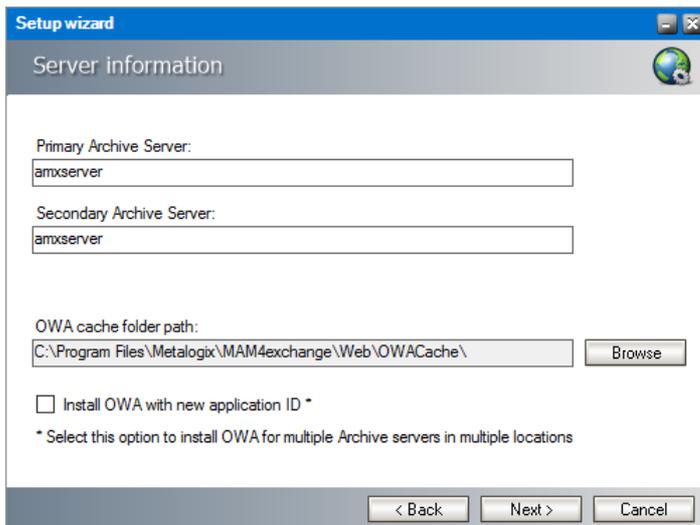
- **Domain** - enter the domain name
- **User** - enter the username
- **Password** - enter the password
- **Confirm password** - confirm the password you entered

For Office 365:

Enter the properties as described below:

- **User** - enter the Microsoft 365 username
- **Password** - enter the password
- **Confirm password** - confirm the password you entered
- **Endpoint type** - Choose from one of the following endpoints:
 - Worldwide endpoints
 - U.S. Government DoD endpoints
 - U.S. Government GCC High endpoints
 - Microsoft 365 Germany endpoints

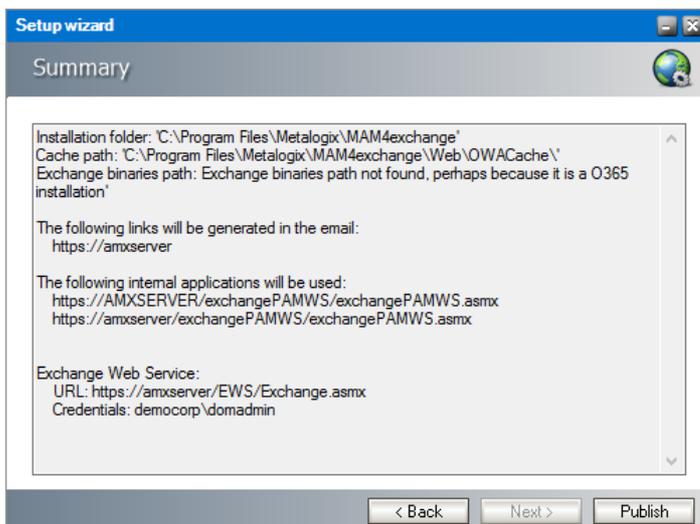
7. Click **Next**. The *Server Information* window opens.



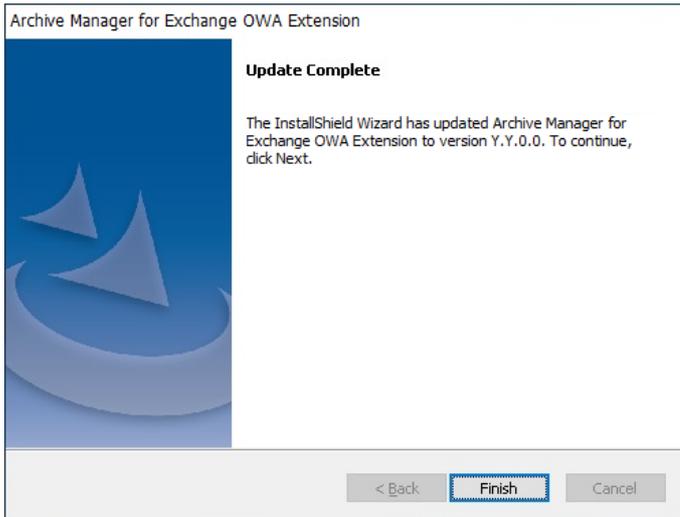
Enter the information as described below:

- **Primary Archive Server** - name of your Archive Manager *Archive* Server.
- **Secondary Archive Server** - name of your Archive Manager *Retrieve* Server. For a single-server deployment, the server name is the same as the **Primary Archive Server**. The secondary server will be used if the primary is not available.
- **OWA cache folder path** - By default, the cache folder is created under the **Web** folder. Use the **Browse** button to change the OWA cache path, if necessary.
- **Install OWA with new application ID** - select this option to install OWA for multiple Archive servers in multiple locations. The unique identifier ensures that the Archive servers can reliably detect the OWA extension in different locations.

8. Click **Next**. The *Summary* window opens.



9. Click **Publish**. The *Installation* window opens and the the upgrade progress is displayed. When the upgrade completes, the *Maintenance Complete* window opens.



10. Click **Finish** to close the configuration setup wizard.

PST Importer and Gatherer

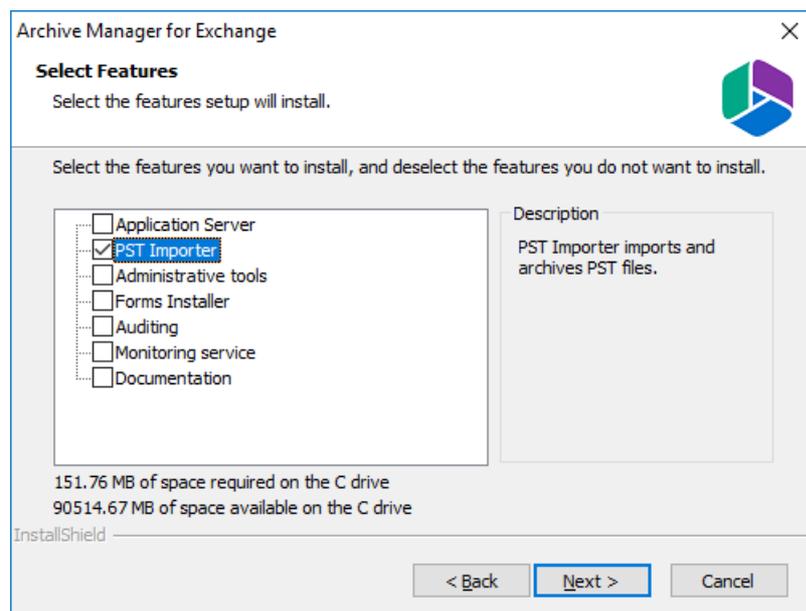
In this topic:

- [Upgrading PST importer](#)
- [Upgrading PST Gatherer](#)

Steps to upgrade PST importer

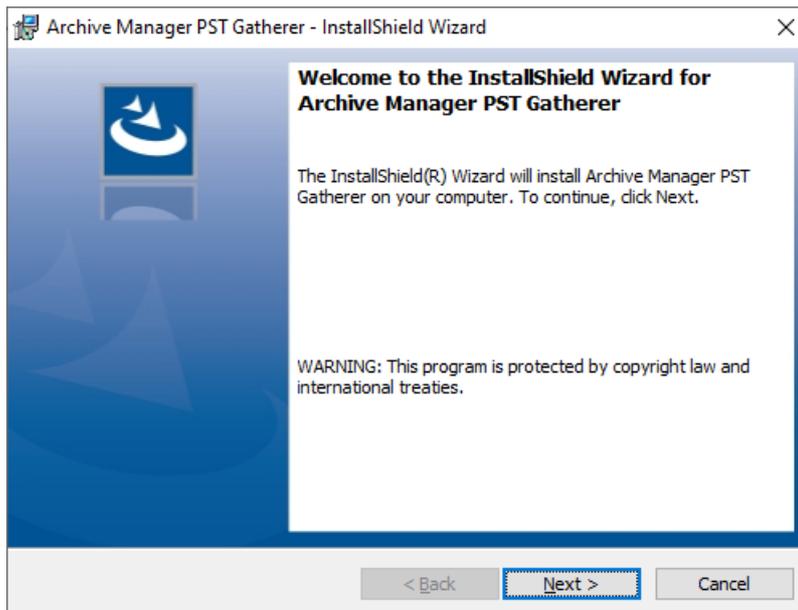
PST Importer is installed by default when you install Metalogix Archive Manager for Exchange. If it has not been installed, see the *Metalogix Archive Manager for Exchange Advanced Installation Guide*. Look for the topic *Install the Archive Server* in the *Advanced Installation* section.

When installing the Metalogix Archive Manager for Exchange you will be prompted to select the individual features. In the *Select Features* window, select the **PST Importer** feature and proceed with the installation.

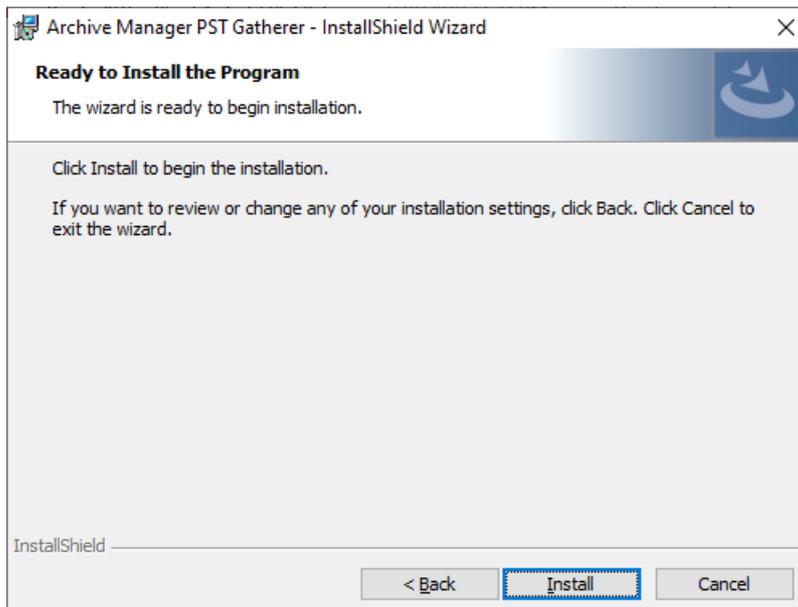


Steps to upgrade PST Gatherer

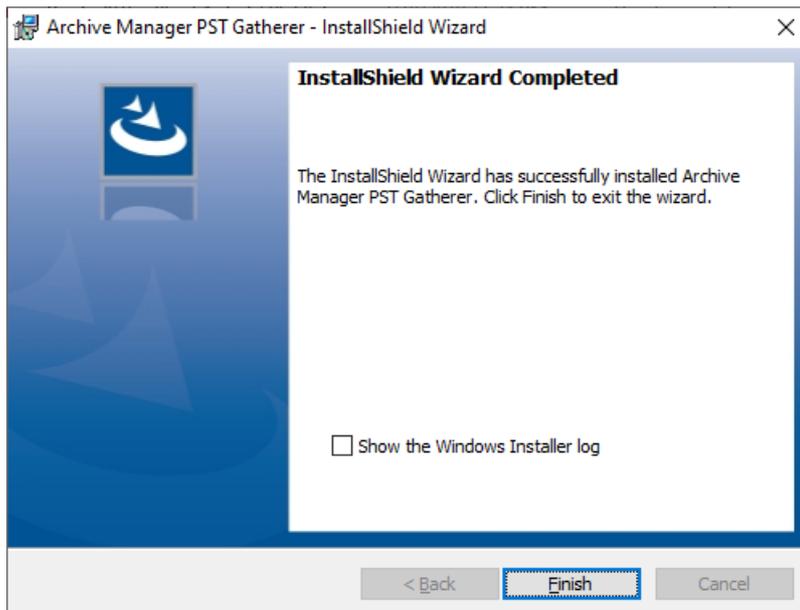
1. Run the installer. The default location is `C:\Metalogix\Archive Manager Installation Package\Exchange\PST Gatherer\Archive Manager PST Gatherer Setup.exe`



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



3. Click **Install**. When the install completes, the *InstallShield Wizard Complete* window opens.



4. Click **Finish** to complete the upgrade.

Search

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

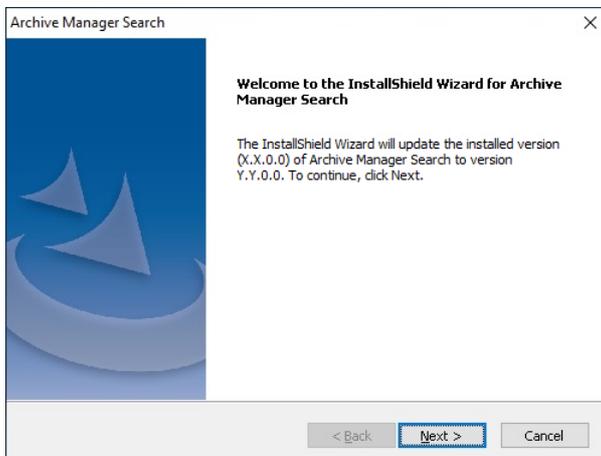
In this chapter:

- [Steps to manually upgrade with the Search installer](#)
- [Steps to manually upgrade the Search database](#)

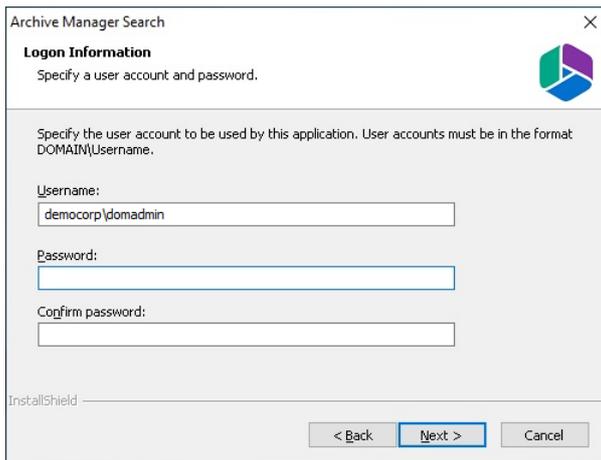
Steps to manually upgrade with the Search installer

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

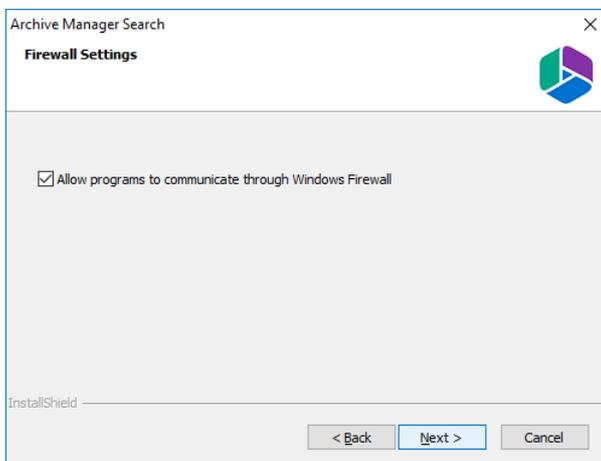
i | **NOTE:** A prerequisite check occurs and missing requirements if any are displayed. Install the prerequisites.



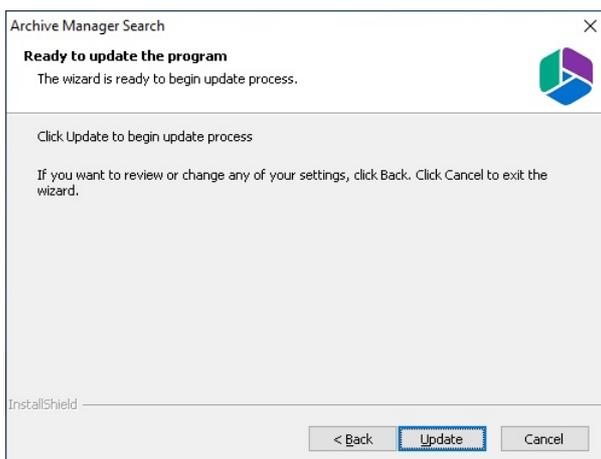
2. Click **Next**. The *Logon Information* window opens.



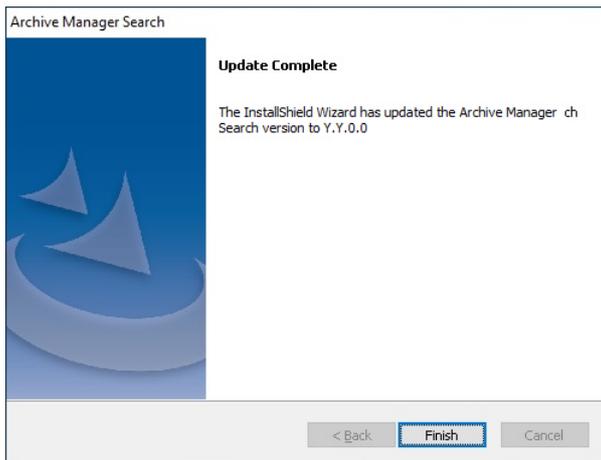
3. Click **Next**. The *Firewall Settings* window opens. Select the check box to allow communications through server firewalls. By default, the **Allow programs to communicate through Windows Firewall** is checked. This will allow critical services to communicate with the SMTP service. If you clear the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



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



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



6. Click **Finish**.

Steps to manually upgrade the Search database

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

For Search

1. From the feature panel on the left in the *Archive Manager Configuration Tool*, click **Search** and select the **Database** tab.
2. Verify that the database connection information is as expected. Then click **Run Scripts**. The *Run Scripts* selection window opens.
3. Click **Select All** to select all check boxes. Click **Next**. The *View SQL scripts* window opens.
4. Click **Next**. The *Run Scripts* authentication window opens. Enter the information as described below:
 - a. **Authentication** - authentication type used for the database. Choose either **Windows authentication** or **SQL Server authentication**
 - a. **Database user** - database login username if *SQL Server authentication* is the selected as the authentication mode.
 - b. **Password** - password of the database user if *SQL Server authentication* is the selected as the authentication mode.
 - c. (optional) Check the **I want to review the SQL Scripts** check box to view the scripts.
5. Click **Next**. If you chose to view the SQL scripts then the *View SQL scripts* window opens. If you chose to view the Oracle scripts then the *View Oracle scripts* window opens
Click **Save Script** to save the script as a script file to a folder. Check the **Word wrap** check box to display long lines as multiple lines of text.
6. Click **Next**. The *Run SQL scripts* window reopens with the scripts you have chosen to run.

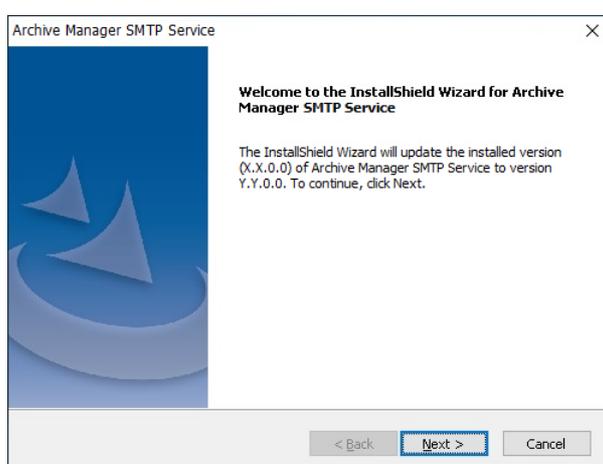
7. Click **Next**. When the status changes to *Scripts were run successfully*, click **Finish** to close the script installer. The *Scripts* section of the **Database** tab displays the status and updated version of the scripts.

For Post Processing

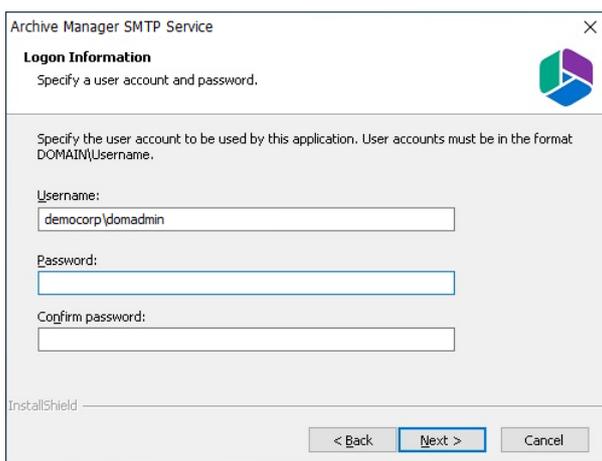
1. From the feature panel on the left in the *Archive Manager Configuration Tool*, click **Post Processing** and select the **Database** tab.
2. Repeat steps 2 to 7 as described in the previous section.

Steps to upgrade

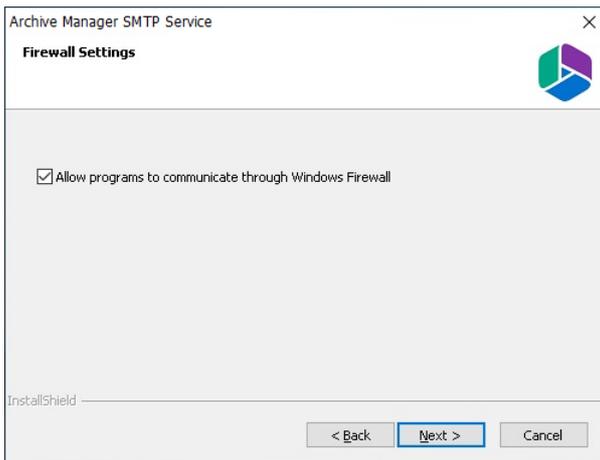
1. Run the installer. The default location is `C:\Metalogix\Archive Manager Installation Package\SMTP\Archive Manager SMTP Setup.exe`. The **Welcome** page of the Archive Manager SMTP Service opens.



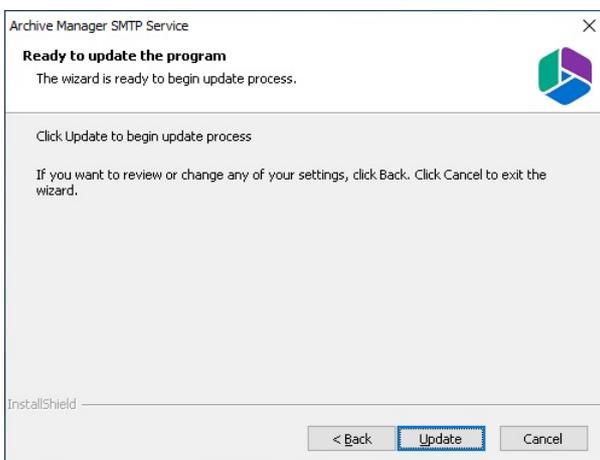
2. Click **Next**. The *Logon Information* window opens. Enter the account details of a user who is authorized to run the SMTP service. It is recommended to use the account information of the super-user that was used to install Archive Manager for Exchange.



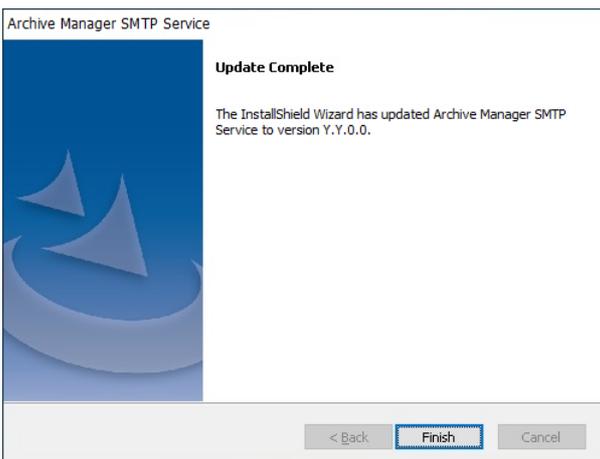
3. Click **Next**. The **Firewall Settings** window opens if the Windows Firewall is active on your computer. By default, the **Allow programs to communicate through Windows Firewall** is checked. This will allow critical services to communicate with the SMTP service. If you clear the check box, critical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



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



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



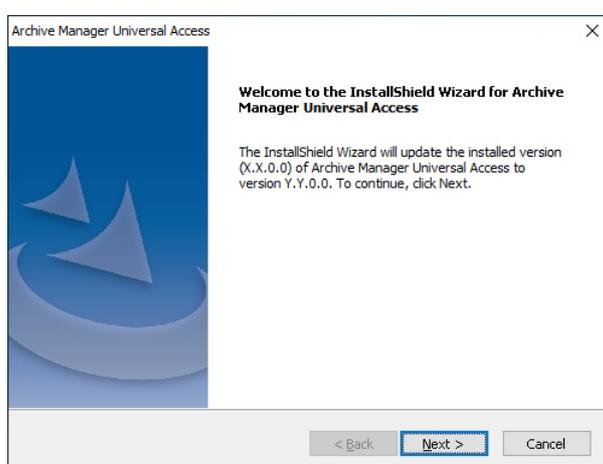
6. Click **Finish**

For more information about SMTP, see the *SMTP Guide*.

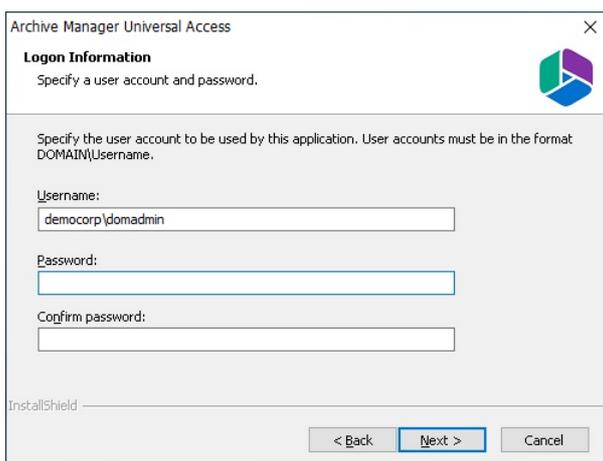
Universal Access

Steps to upgrade

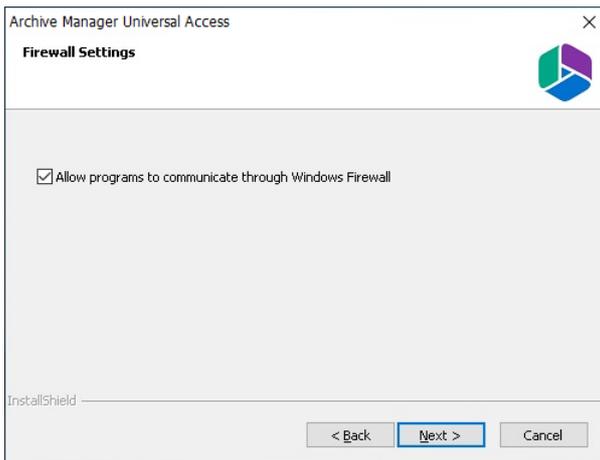
1. Run the installer. The default location is `C:\Metalogix\Archive Manager Installation Package\Universal Access\Archive Manager Universal Access Setup.exe`. The **Welcome** page of the Archive Manager Universal Access opens.



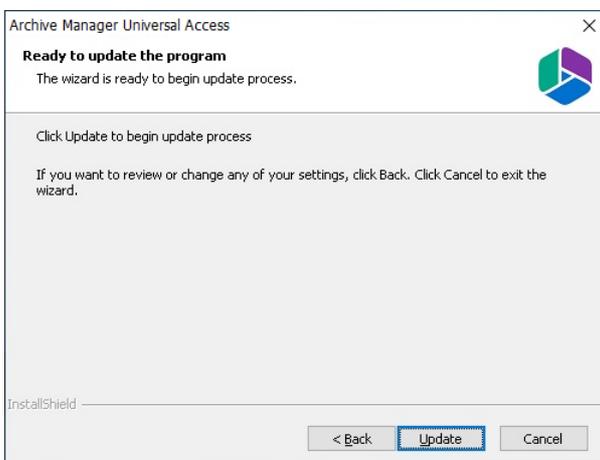
1. Click **Next**. The *Logon Information* window opens. Enter the account details of a user who is authorized to run the Archive Manager Universal Access. It is recommended to use the account information of the super-user that was used to install Archive Manager for Exchange.



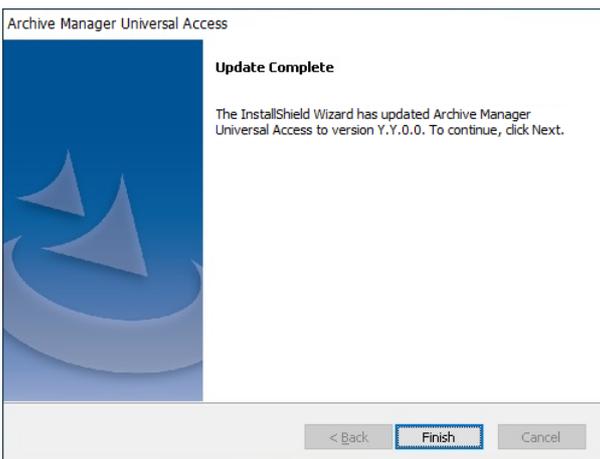
2. Click **Next**. The **Firewall Settings** window opens if the Windows Firewall is active on your computer. By default, the **Allow programs to communicate through Windows Firewall** is checked. This will allow critical services to communicate with the Archive Manager Universal Access. If you clear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



3. Click **Next**. The *Ready to Install the program* window opens.



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



5. Click **Finish**.

For more information about Universal Access configuration see the *Universal Access Guide*.

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.

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- Sign up for product notifications
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- View how-to-videos
- Engage in community discussions
- Chat with support engineers online
- View services to assist you with your product