

## Metalogix<sup>®</sup> Archive Manager for Exchange 8.5

## **Advanced Installation Guide**



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#### Legend

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

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## Introduction

Metalogix Archive Manager for Exchange provides the most flexible and effective way to collect, archive, search and secure all you organization's email from one central location. You can control the retention policy of archived emails by moving emails to inexpensive locations as their relevance changes with the option to delete old messages unless they are on legal hold. With robust version control, any previous version of an archived email can be restored at any time along with its attachments. Metalogix Archive Manager for Exchange also offers online management of archived emails, as well as mobile and offline email access to users on the road.

The primary features of Metalogix Archive Manager for Exchange and HSM are as follows:

- Archive Manager for Exchange email archiving engine that includes the windows services and the Archive Manager for Exchange Administration Center (AMAC). Archive Manager for Exchange has the following components:
  - Application Server contains the core functionality of the Archive manager for Exchange.
  - Administrative tool installs the Archive Manager for Exchange Administration Center (AMAC). The AMAC can be installed as a standalone application on other computers as well and allows several administrators to manage Metalogix Archive Manager for Exchange deployment.
  - *PST Importer* installer files for the PST Importer feature which import and archives emails from PST files. PST Importer can be set up to work with the *PST Gatherer* feature that runs either as an application or a service. It assists users with gathering PST files that are stored in distributed locations like network shares in addition to local drives.
  - Forms Installer installer files and template which are used to publish Archive Manager forms to the Organizational Forms Library or the Personal Forms Library. It can only be used on a computer where Outlook is running.
  - Auditing allows administrators to log defined user actions in the email archive like archiving, retrieving, restoring and search history that were initiated from Outlook or ArchiveWeb. This feature can be installed on the Archive Manager for Exchange server or on a separate machine.
  - *Monitoring service* Monitors other Archive Manager services and alerts the administrator via notification email if necessary. Notification emails are sent only if an error occurs.
  - $\circ$  <code>Documentation</code> Offline documentation about the product.
- Hierarchical Storage Manager (HSM) a data storage system for managing your email archive store as well as all company data on one or more file-servers. HSM ensures that files with identical content are stored only once regardless of where the original file is located.

The following *optional* features are integrated with the Metalogix Archive Manager for Exchange product installer:

- Archive Manager Search full text search engine capable of searching archived emails.
- Archive Manager ArchiveWeb online archive interface with advanced search and reporting functionality.

The following *optional* features are included as separate installers in the download package:

- Archive Manager OWA Extension feature that is installed on the Microsoft Exchange Server to provide Outlook Web Access (OWA) for archived emails to end-users.
- Archive Manager Universal Access allows mobile users, Mac users and Linux users to work with archived emails.
- Archive Manager SMTP Service allows processing of messages from an external email server (O365, Gmail, Exchange, etc.) into Metalogix Archive Manager for Exchange.
- Archive Manager Outlook Addin gives authorized users the ability to archive and restore emails with the Outlook desktop client.
- Archive Manager PST Gatherer Setup automated extension to PST importer.

This advanced install guide describes the installation of the primary features of Metalogix Archive Manager for Exchange in a distributed environment. To allow load balancing and redundancy for large email volumes, Metalogix Archive Manager provides you with the ability to configure several Archive Manager servers. You can add additional features as required.

### About the email archive and retrieval process

When emails are archived, Metalogix Archive Manager for Exchange uses shortcuts to replace archived emails in the on-premise or online Microsoft Exchange mailboxes. Email shortcuts require very little space, reducing your email storage by up to 80% and email backup time by 50%. Messages remain available to end-users who can work with them as usual. This helps your endusers access all their data while reducing the need to set mailbox quotas and removing the dependency on PST files.

When a user clicks a shortcut to an archived email, Archive Manager for Exchange passes the information from the shortcut to HSM which restores the email from the store.

HSM uses the Single-instance storage (SIS) service that takes multiple copies of the content and replaces them with a single shared copy. It allows version control, eliminates data duplication, and increases storage and retrieval efficiency.

## **System Requirements**

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The requirements described below are applicable for installing the Metalogix Archive Manager for Exchange application components, and are compatible with the following Microsoft Exchange servers:

- Microsoft Exchange Server 2013
- Microsoft Exchange Server 2016
- Microsoft Exchange Server 2019
- Microsoft Office 365 (Exchange Online)
- **NOTE:** System requirements for optional components of the Metalogix Archive Manager for Exchange are described in the corresponding document for each optional component.

### Hardware

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

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

### **Operating System**

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

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

### **Windows Server Roles**

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

### **Windows Features**

- Remote Server Administration Tools
  - $\,\circ\,$  Role Administration Tools > AD DS and AD LDS Tool > Active Directory module for Windows PowerShell
    - **NOTE:** Ensure that PowerShell can communicate between the Archive Manager server and the Exchange server and between the Archive Manager server and the domain controller
- .NET Framework 3.5 Features

### For Windows Server 2012 and 2012 R2

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

### For Windows Server 2016

- .NET Framework 4.6 Features > .NET Framework 4.6
- .NET Framework 4.6 Features > ASP.NET 4.6

• .NET Framework 4.6 Features > WCF Services (all checkboxes under this item)

### For Windows Server 2019

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

### **Redistributable packages**

- Microsoft Visual C++ 2017 Redistributable Package (x64)
- Microsoft Visual C++ 2017 Redistributable Package (x86)

### **Microsoft Outlook**

The table below identifies the mail clients that are supported for use together with each version of Exchange. Supported clients are identified by a check mark ( $\checkmark$ )

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

**NOTE:** 1 - Supported with the latest Office service pack and public updates.

### **Database Servers and Drivers**

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

### **Web Browsers**

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

- Microsoft Edge
- Mozilla Firefox 16 or higher
- Chrome 33 or higher
- Opera 12 or higher

### **Additional Information**

- Installation of Metalogix Archive Manager application components on a Microsoft Exchange Server or Domain Controller are not supported.
- The software installs web applications in the Default Web Site. This could cause conflict with other applications like Microsoft CRM or Microsoft SharePoint. To change the installation website, manual changes are required after the installation. Please contact Technical support in such cases.
- Metalogix Archive Manager for Exchange is fully supported in a virtualized environment.

## **Deployment Plan**

The advanced installation of Metalogix Archive Manager for Exchange is used by large organizations that deploy a distributed server topology to increase the efficiency and throughput of email archival and retrieval. In the illustration below, a conceptual distributed deployment plan is presented in a single domain called *democorp.com* that is managed by a domain controller labeled **AMXDC**.

In this domain, there is a singled on-premise Microsoft Exchange server labeled **AMXEXCH** that manages the communication for all users and groups in the domain. Users have access to an online Exchange server (O365) as well, labeled *democorp.onmicrosoft.com* that has a separate active directory which may or may not be integrated with the on-premise active directory. An optional feature called *Archive Manager for OWA Extension* can be installed on the on-premise Exchange server so that users can view regular and archived emails online.

The servers that comprise the distributed topology of Metalogix Archive Manager for Exchange are labeled for ease of reference, and will be used throughout this guide to describe the preparation, installation, configuration, and verification of the deployment.

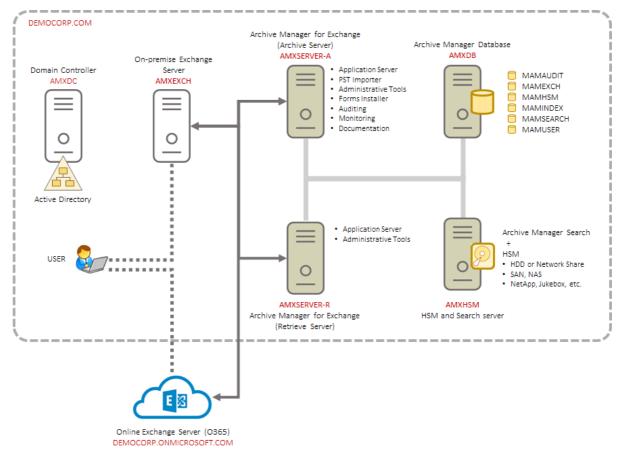


Figure 1. Topology for a distributed deployment of Metalogix Archive Manager for Exchange

The roles of the different servers are explained below:

### AMXDB

This is a dedicated database server that hosts the various databases that are used by the Metalogix Archive Manager for Exchange features to manage the archival and retrieval of emails. A single database server can host all the databases used by Metalogix Archive Manager for Exchange. Organizations that have email volumes in excess of one million, are advised to distribute the databases across dedicated database servers as follows: MAMEXCH for the Archive Manager for Exchange, and MAMHSM, MAMINDEX and MAMSEARCH for the HSM and Archive Manager Search features.

### AMXHSM

This server hosts two features of the Metalogix Archive Manager for Exchange: the **Hierarchical Storage Manager (HSM)** and **Archive Manager Search**.

HSM is a data storage system for managing archived emails and files. HSM can manage a larger network of servers in organizations that use dedicated file servers. When the Archive Manager for Exchange server (AMXSVR-A) sends emails to HSM, they are immediately compressed and archived. When a user requests an archived email, HSM immediately decompresses the archived email and returns it to the Exchange server where the request originated, through the Archive Manager for Exchange server (AMXSVR-R). The Exchange server returns the email to the user.

Archive Manager Search is a full text search engine capable of searching archived emails and files. To increase the search efficiency archived emails are indexed. Users can search emails in their mailboxes and folders. Users can search the mailboxes and folders of other users as well if they have the requisite permissions.

### AMXSVR-A

This server hosts the **Archive Manager for Exchange** application server with the *Archive Server* role that defines the dedicated archival function of this server. This server is commonly called the **Archive** server.

### **AMXSVR-R**

This server hosts the **Archive Manager for Exchange** application server with the *Retrieve Server* role that defines the dedicated retrieval function of this server. This server is commonly called the **Retrieve** server.

## **About User Accounts**

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

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

**Superuser account** - Domain user account that is used to run the windows services, and administer the application. The superuser account needs additional privileges and configuration to be able to communicate with the Microsoft Exchange Server. The advanced installation wizard manages all the setup and configuration steps that are required, but if you choose to do a manual installation, see <u>Manual Installation</u> for a summary of steps to setup a superuser.

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

### Considerations for the database user

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

### For SQL Server

### Windows Authentication

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

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

## **Advanced Installation**

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

**NOTE:** Some organizations prefer a more granular control on the installation process. You can choose to install all the features manually. For more information about the manual installation process, see the chapter <u>Manual Installation</u>.

In this chapter:

- Setup the Superuser Account
- Prepare the Application Servers
  - o Steps to download the install media
  - o Steps to install the prerequisites
  - o Steps to install Microsoft Outlook
- Install the Application Features
  - o Install HSM and Archive Manager Search
  - o Install Archive Manager for Exchange (Archive server)
  - o Install Archive Manager for Exchange (Retrieve server)

For next steps after you complete the advanced installation, see Application Configuration.

### **Setup the Superuser Account**

A superuser account is a windows account with administrator privileges to work with Metalogix Archive Manager for Exchange administration tools, run services, manage databases, manage extensions. It also has elevated privileges to interact with the on-premise or online Microsoft Exchange servers.

In this topic:

1. Steps to create the superuser account

- 2. Steps to add the superuser to the Administrators group of the servers
- 3. <u>Steps to add the superuser as a database user with sysadmin role</u> (for Windows authentication only)
- **i NOTE:** There are more configuration steps necessary to grant elevated permissions to the superuser. When you use the *Advanced Installation* option from the Metalogix Archive Manager for Exchange installation wizard, all the other configurations are automatically completed for you. For the complete set of configuration steps, see <u>Setup the Superuser</u> <u>Account</u> in the manual installation chapter of this guide.

### Steps to create a superuser account

- 1. Log in to the domain controller.
- 2. Navigate to Start > Windows Administrative Tools > Active Directory Users and Computers.
- 3. From the *Console Tree*, expand the domain node.
- 4. Click the **Users** container. The list of users opens in the right-hand pane.
- 5. Click the **Action** menu and select **New** > **User**. The *New Object User* window opens.

Create in: democorp.com/Users     Eirst name: MAM   Last name: Administrator   Full ngme: MAM Administrator   User logon name:   mamadmin   @democorp.com   User logon name (pre-Windows 2000):   DEMOCORP\     Mamadmin	lew Object - User		×	
Last name:       Administrator         Full name:       MAM Administrator         User logon name:       @democorp.com         User logon name (pre- <u>Wi</u> ndows 2000):       User logon name (pre- <u>Wi</u> ndows 2000):	Create in:	democorp.com/Users		
Full name: <u>U</u> ser logon name: mamadmin @democorp.com User logon name (pre- <u>W</u> indows 2000): DEMOCORP\ mamadmin	<u>F</u> irst name:	MAM Initials:		
User logon name: mamadmin @democorp.com ✓ User logon name (pre- <u>W</u> indows 2000): DEMOCORP\ mamadmin	Last name:	Administrator		
mamadmin     @democorp.com        User logon name (pre- <u>W</u> indows 2000):     DEMOCORP\     mamadmin	Full n <u>a</u> me:	MAM Administrator		
User logon name (pre- <u>W</u> indows 2000): DEMOCORP\ mamadmin	User logon name:			
DEMOCORP\ mamadmin	mamadmin	@democorp.com ~		
	User logon name (pre-	<u>W</u> indows 2000):		
Rack Next > Cancel	DEMOCORP\	mamadmin		
Rade Next > Canad				
		< Back Next > Cance	<u> </u>	

- 6. Verify that **Create in** title indicates the appropriate domain name and container, and then enter the details of the superuser. For example:
  - a. Full name: MAM Administrator
  - b. User logon name: mamadmin@democorp.com
- 7. Click Next.
- 8. Enter the password and confirm it. Then select **Password never expires**. Uncheck all other check boxes.

#### 9. Click Next.

New Obje	ect - User				×
8	Create in:	democorp.	com/Users		
When y	ou click Finish	, the following	g object will be	created:	
Full nar	me: MAM Adm	nistrator			^
User lo	gon name: ma	madmin@der	nocorp.com		
The pa	ssword never	expires.			
					~
			< Back	Finish	Cancel
			_	Buund	

10. Verify the information and click **Finish**.

# Steps to add the superuser to the Administrators group of the servers

The superuser must be able to run windows services and accomplish tasks that require administrator privileges on the Metalogix Archive Manager for Exchange feature servers. Follow the steps described below to grant administrator privilege to the superuser on each feature server.

- 1. Log in to each server with its local administrator credentials.
- 2. Navigate to Start > Windows Administrative Tools > Computer Management
- 3. From the Console Tree, navigate to the **System Tools** > **Local Users and Groups** > **Groups** container.
- 4. From the list of groups in the right-hand pane, right-click **Administrators** and select **Properties** from the context menu. The *Administrators Properties* window opens.
- 5. Click Add.
- 6. In the **Enter the object name to select** field, enter the user logon name of the super user. For example, enter sales\mamadmin
- 7. Click **Check Names** to verify the logon name.

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

- 8. Click **OK** to add the superuser to the Administrator group.
- 9. In the Administrators Properties window, click Apply and OK to complete the process.
- **TIP:** Log out of the server and log in again with the superuser's credentials to quickly verify that the superuser can access the server.

# Steps to add the superuser as a database user with sysadmin role

If you plan to use *Windows authentication* with a Microsoft SQL Server database, follow the steps described below:

- 1. Log in to the database server with your database administrator credentials.
- 2. Open the SQL Server Management Studio on your SQL server database server.
- 3. Log in to the server instance for Metalogix Archive Manager for Exchange databases.
- 4. Open the **Security** folder.
- 5. Right-click on the **Logins** folder and select **New Login**. The *Login New* user properties window appears.
- 6. If you want to assign rights to a Windows account, select Windows authentication.
- 7. Provide the login name in the text box. You can use the **Browse** button to select an existing account if you chose Windows authentication (eg. **democorp\mamadmin**)
- 8. In the user properties window, click **Server Roles** from the *Select a page* panel and select the check box **Sysadmin.**
- 9. Click **OK** to create the account.
- **NOTE:** Follow the above steps to add the installer account (eg. **democorp\domadmin**) with the **Sysadmin** role.

## **Prepare the Application Servers**

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

See the <u>System Requirements</u> and <u>About User Accounts</u> chapters for preparing database servers.

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

- Steps to install the prerequisites
- Steps to download the install media

### For the Archive server (AMXSERVER-A)

- Steps to install the prerequisites
- Steps to install Microsoft Outlook
- Steps to download the install media

### For the Retrieve server (AMXSERVER-R)

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

### Steps to install the prerequisites

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

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

### Archive Manager for Exchange (for Archive and Retrieve servers)

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

#### HSM

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

### Search

Install-WindowsFeature -Name NET-Framework-Features

### 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 <u>System Requirements</u> chapter to modify the script for other supported Windows operating systems or install them manually.
- 4. Install the database drivers. For Microsoft SQL Server, the database driver is available in the folder <installation folder>\Archive Manager Installation Package\Install.
- 5. Install the redistributable packages required for your operating system. These files are available in the folder <installation folder>\Archive Manager Installation Package\Install.

### **Steps to install Microsoft Outlook**

The Metalogix Archive Manager Server communicates with on-premise and online Microsoft Exchange servers via MAPI. To provide your Archive Manager server with a MAPI subsystem, install Outlook with full Unicode compatibility. See <u>System Requirements</u> for version compatibility with your Microsoft Exchange servers.

### Steps to download the install media

- 1. Login to the server with the credentials of the superuser (eg. democorp\mamadmin)
- 2. From your browser, navigate to the <u>https://www.quest.com/products/metalogix-archive-manager-for-exchange</u> page

or

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

- 3. Click the **Download Free Trial** button.
- 4. Fill the *Download Your Free Trial* registration form and click **Download Trial**. The file download page appears.
- 5. Download the install media zip file.
- 6. The the trial license key is specified in the email that is sent to you.

7. Ensure that the files are available locally on the computer on which you are planning to install the Metalogix Archive Manager for Exchange features.

### **Install the Application Features**

### For HSM and Search server (AMXHSM)

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

Install HSM and Archive Manager Search

### For Archive server (AMXSERVER-A)

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

Install the Archive server

### For Retrieve server (AMXSERVER-R)

Install the Retrieve server

### Install HSM and Archive Manager Search

In this topic:

- Worksheet for this installation
- Steps to install HSM and Archive Manager Search
- <u>Steps to verify the installation</u>

### Worksheet for this installation

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

Item	Description	Example
HSM server	The server where the HSM and Archive Manager Search will be installed.	AMXHSM
Installer account	Windows account that is used to install the application. This is	username: democorp\domadmin password: ************

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

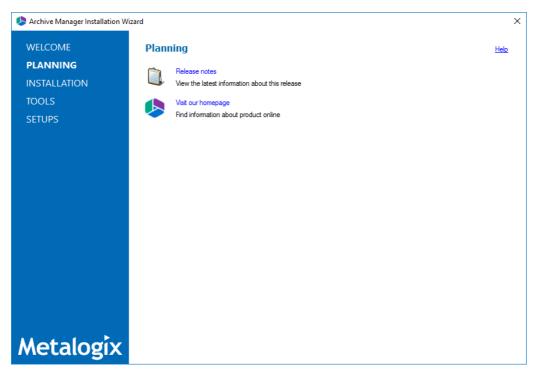
	Archive Manager for Files will be installed.	
--	--	--

### **Steps to install HSM and Archive Manager Search**

- 1. Log in to the server with the credentials of the **enterprise administrator** (eg. **democorp\domadmin**).
- 2. Run the Metalogix Archive Manager Installation Package to extract the files to a local folder.
- 3. If the installer does not start immediately, run the **MAMInstaller.exe** from your install media folder. The *Welcome* window opens.



4. From the navigation panel on the left, click **PLANNING**. The *Planning* window opens.



Review the requirements and release notes. If necessary, visit the Quest website for more information.

5. From the navigation panel on the left, click **INSTALLATION**. The *Server Installation* window opens.

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

Read the **Software Transaction Agreement**. If you wish to proceed, select the **I accept the terms of the license agreement** check box.

6. Click Next. The Installation Mode window opens. Select the Advanced installation option.

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

7. Click Next. The *Installation Components* window opens. Select HSM and Archive Manager Search.

WELCOME	Installation Components		Help
PLANNING			
INSTALLATION	Component	Setup	Installed
TOOLS	И ням	8.5.0.100	
SETUPS	Archive Manager for Files	8.5.0.100	
	Archive Manager for Exchange	8.5.0.100	
	Archive Manager Search	8.5.0.100	
	ArchiveWeb	8.5.0.100	
	Product description: ArchiveWeb offers an intuitive interface to access archived data and provides searc categorization abilities, legal hold, full auditing, 3rd party export and collaborative eD		ch filters, tagging and
	ArchiveWeb offers an intuitive interface to access archived data and provides searchived data and provi		ch filters, tagging and

8. Click **Next**. The *Database Engine* selection window opens. Select either **Microsoft SQL Server** or **Oracle**.

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

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.

Archive Manager Installation W	izard	×
WELCOME	Checking Prerequisites	<u>Help</u>
PLANNING		•
INSTALLATION		<sup>1</sup>
TOOLS	User Permissions	<b>~</b>
SETUPS	User DEMOCORP\domadmin has all the necessary permissions.	
	Microsoft Windows Features And Roles	
	All the necessary Microsoft Windows Features And Roles are installed.	<b>W</b>
	Install	
	OLE DB Driver for SQL Server	<b></b>
	OLE DB Driver for SQL Server was detected.	~
	Install Installation Successful	
	Visual C++ Redistributable Packages	<b>A</b>
	Visual C++ Redistributable Package was detected.	M.
	Install Installation Successful	
	instan instance of Juccessiun	~
Metalogix		< Back Next > Cancel

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

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

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**.

Question		×
?	The entered user account does not exist. Would you like to create it and continue?	
	<u>Y</u> es <u>N</u> o	

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

Archive Manager Installation W	izard			×
WELCOME	Database Server Connection		Help	
PLANNING				
INSTALLATION	Please fill in all values which will be used to create a connection to	your Database S	erver.	1
TOOLS	Component		DB Server	
SETUPS	нѕм		MSSQL	
	Archive Manager Search		MSSQL	
	Archive Manager Post-Processing			
				,
	✓ Authentication			
	Authentication UserLogin	Integrated Wind	ows Authentication	
	Password  Server instance			
	Server instance     Schema name	dbo		
	Server name	AMXDB		
	Database name	MAMHSM		
	Authentication Authentication type			
Metalogix			< Back	Next > Cancel

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

Enter the database parameter values described below:

For Microsoft SQL Server

- a. Authentication database authentication method.
- b. UserLogin Username if SQL Authentication or Oracle client is selected. Otherwise this field is deactivated.
- c. **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.

- 12. From the *Component* column, select **Archive Manager Search** and verify the database parameter values.
- 13. 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.
- 14. Click **Next**. The *Hierarchical Storage Manager Settings* window opens.

Archive Manager Installation Wi	zard				×
WELCOME	Hierarchica	l Storage Manager Settin	igs		<u>Help</u>
PLANNING					
INSTALLATION	The Hierarchical Storage Manager (HSM) stores the archived content of files. The HSM also manages the Single Instance Function so that indentical files are stored only once no matter how many times they				
TOOLS	occur in the file syst		only once no matter	ion many anes arey	
SETUPS					
	Local HSM insta HSM server:	AMXHSM			
	Store name: Please select a loca	FilesStore ation for the HSM folder which is large enou	Schema name: oh to handle all of th		<u>.</u>
	Store folder:	C:\HSM			Browse
Metalogix				< Back Next	> Cancel

15. 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.

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

line Manager Installation Wi	zard	×
WELCOME	Archive Manager Search Settings	<u>Help</u>
PLANNING		
INSTALLATION	Search server: AMXHSM	
TOOLS		
SETUPS	Search index folder:	
	To keep the default folder dick Next. To specify a different folder dick Browse.	
	For emails: C:\Program Files (x86)\Metalogix\MAIMSearch\Index\Mail Browse	
	For files: C:\Program Files (x86)\Metalogix\MAMSearch\Index\File Browse	
		1
Metalogix	< Back Next > Ca	ancel

Specify the parameter values as described below:

a. **Search server** - name of the server where the Archive Manager Search feature is installed. For example **AMXHSM**. 17. Click **Next**. The *Firewall Settings* window opens.

s Archive Manager Installation Wizard					
WELCOME	Firewall Settings	<u>Help</u>			
PLANNING					
INSTALLATION	☑ Allow programs to communicate through Windows Firewall				
TOOLS	<ul> <li>Allow programs to communicate through withdows mewait</li> </ul>				
SETUPS					
Metalogix	< Back Next > Ca	ancel			

Select the **Allow installation package to change the firewall settings** check box. Metalogix Archive Manager for Exchange features will be then able to communicate through the firewall.

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

Archive Manager Installation W	izard	×
WELCOME	Summary Installation	<u>Help</u>
PLANNING	This is the installation summary.	
INSTALLATION	Components to be installed:	~
TOOLS		
SETUPS	Product name: HSM Version: 8.5.0.100 HSM schema name: FilesSchema HSM store name: FilesStore HSM store path: C:\HSM	
	Product name: Archive Manager Search Version: 8.5.0.100 Search provider: PAMSEARCH Search index folder (Mf for Exchange): C:\Program Files (x86)\Metalogix\MAMSearch\Index\Mail Search index folder (AM for Files): C:\Program Files (x86)\Metalogix\MAMSearch\Index\File	
	Installation folder: C:\Program Files (x86)\Metalogix	
		>
Metalogix	< Back Install > C	ancel

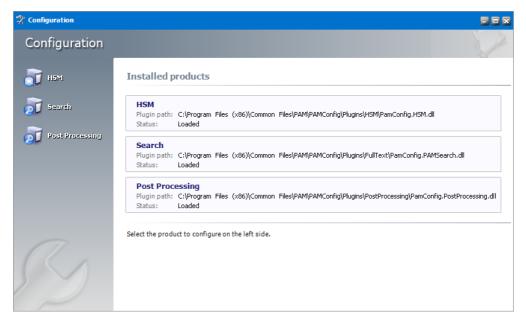
Archive Manager Installation V	Vizard		Х
WELCOME PLANNING	Installation	He	<u>alp</u>
INSTALLATION	DCOM access and launch permissions		$\sim$
TOOLS SETUPS	HSM installation Archive Manager Search installation	Completed Completed	~
SETUPS	Archive Manager Post-Processing installation Starting services	Completed Completed	~ ~
Metalogix		Finish	

#### 19. Click Install to start the installation.

- 20. 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.
- 21. Click Finish to complete the installation step.

### Steps to verify the installation

1. Open Start > Metalogix > Archive Manager Configuration. The Configuration wizard opens.



2. From the navigation panel, click **HSM**. The *Configure HSM* widow opens and the **Database** tab is displayed by default.

😤 Configuration						
Configure HSM	Data	oase Stores	Advanced	Diagnostics	Encryption	Packer Tasks
🕡 нѕм 🕨 🕨	Database conne Provider:	ection Microsoft SQ	L Server			
👼 Search	Server name:	AMXDB				
of Post Processing	Initial catalog: Schema name: User name:	MAMH5M dbo (Windows Au	thentication	)		
	Scripts					Configure
	Database version:	8.5.0.39				
	Scripts version:	8.5.0.39				
$\langle \langle \rangle$	🥝 Your database	is up to date.				Run scripts

Verify that the values are as expected.

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

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

Verify that the values in the Stores and Schemas sections are as expected.

4. From the navigation panel, click **Search**. The *Configure Search* window opens.

🞇 Configuration				
Configure Searc	:h		Database	Search Scopes Connectivity
🛐 нем	🙆 Database contr	ection		
Search	Provider: Server name:	Microsoft SQL Server		
🕡 Post Processing	Initial catalog: Schema name:	MAMSEARCH dbo		
	User name:	(Windows Authentication)		Configure
	Database version: Scripts version:	8.5.0.21 8.5.0.21		
	🥝 Your database i	is up to date.		
				Run scripts

Verify that the values are as expected.

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

🛠 Configuration				
Configure Post	Processing	Database	General Settings	Post Processing Scopes OCR Engine
可 нам	😼 Database conne	ection		
🗊 Search	Provider: Server name:	Microsoft SQL S AMXDB	ōerver	
Post Processing 🕨	Initial catalog: Schema name:	MAMINDEX dbo		
	User name:	(Windows Auth	entication)	Configure
Ŋ	Database version: Scripts version:	8.5.0.16 8.5.0.16 is up to date.		
				Run scripts

Verify that the values are as expected.

6. Close the *Configuration* wizard. If the *Incomplete configuration* dialog opens, click **Yes** to dismiss the window and close the wizard.

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

- 7. Open Start > Windows Administrative Tools > Computer Management. The *Computer Management* console opens.
- 8. From the *Console Tree*, expand **Local Users and Groups**.
- 9. Click the **Groups** node to display the list of groups.

🎥 Computer Management			- 0 X
File Anting View Hale			
File Action View Help			
🖻 🛸   🞽 📷   👗 🗒 📑   🚺			
Computer Management (Local)	Name	Description	Actions
V 👔 System Tools	Access Control Assist	Members of this group can remotely query authorization	Groups
> 🕑 Task Scheduler > 🛃 Event Viewer	Administrators	Administrators have complete and unrestricted access to Backup Operators can override security restrictions for the	More Actions
> is Shared Folders✓ is Local Users and Groups	Ertificate Service DC	Members of this group are allowed to connect to Certific	Administrators
<ul> <li>Eccal Users and Groups</li> <li>Users</li> <li>Groups</li> <li>Performance</li> <li>Device Manager</li> <li>Storage</li> <li>Windows Server Backup</li> <li>Disk Management</li> <li>Services and Applications</li> </ul>	Cryptographic Operat     Distributed COM Users     Event Log Readers     Guests     Hyper-V Administrators     IS JUSRS     Network Configuratio     Performance Log Users     Performance Monitor     Power Users     Power Users     RDS Endpoint Servers     RDS Remote Access S     Remote Desktop Users     Remote Management     Replicator     Storage Replica Admi	Members are authorized to perform cryptographic opera Members are allowed to launch, activate and use Distrib Members of this group can read event logs from local m Guests have the same access as members of the Users y Members of this group have complete and unrestricted a Built-in group used by Internet Information Services. Members of this group can have some administrative pri Members of this group can access performance counter Power Users are included for backwards compatibility ar Members can administer printers installed on domain cc Servers in this group can perform routine administrative Servers in this group can perform routine administrative Servers in this group can access WMI resources over n Supports file replication in a domain Members of this group have complete and unrestricted a Members of this group are managed by the system. Users are prevented from making accidental or intention	
	-	· · · · · · · · · · · · · · · · · · ·	1

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

Administrators Pro	operties			?	×
General					
Adminis	strators				
Description:	Description: Administrators have complete and unrestricted access to the computer/domain				SS
Members:	P∖Domain Adr	nins			
Add         Remove         Changes to a user's group membership are not effective until the next time the user logs on.					
	ОК	Cancel	<u>A</u> pply	He	lp.

Verify that the superuser account is listed in the *Members* panel. For example, **DEMOCORP\mamadmin** 

11. Click **OK** to close the properties window, and then close the *Computer Management* console.

### Install the Archive server

In this topic:

- Worksheet for this installation
- Steps to install Metalogix Archive Manager for Exchange
- Steps to configure and verify the Archive server

#### Worksheet for this installation

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

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

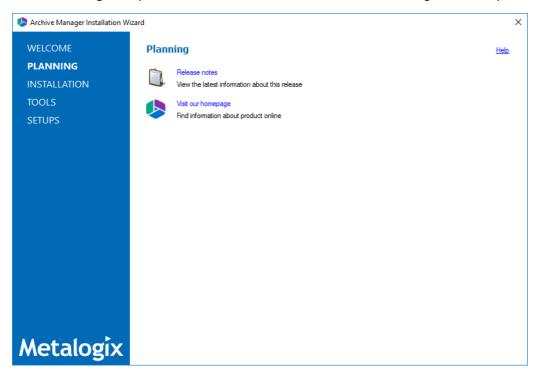
UserLogin	Username if <i>SQL Authentication</i> is selected	dbadmin
Password	Database password if <i>SQL</i> Authentication is selected	****
Database server	The database server instance name where the databases for Archive Manager for Exchange will be installed.	AMXDB
HSM server	The server where HSM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

#### **Steps to install Metalogix Archive Manager for Exchange**

- Log in to the server with the credentials of the enterprise administrator (eg. democorp\domadmin).
- 2. Run the Metalogix Archive Manager Installation Package to extract the files to a local folder.
- 3. If the installer does not start immediately, run the **MAMInstaller.exe** from your install media folder. The *Welcome* window opens.



4. From the navigation panel on the left, click **PLANNING**. The *Planning* window opens.



Review the requirements and release notes. If necessary, visit the Quest website for more information.

5. From the navigation panel on the left, click **INSTALLATION**. The *Server Installation* window opens.

Archive Manager Installation Pa	ckage	×
WELCOME	Server Installation	<u>elp</u>
PLANNING		
INSTALLATION	Software Transaction Agreement	^
TOOLS SETUPS	PLEASE READ THIS AGREEMENT CAREFULLY BEFORE USING THIS PRODUCT. BY DOWNLOADING, INSTALLING OR USING THIS PRODUCT, YOU ACCEPT AND AGREE TO THE TERMS AND CONDITIONS OF THIS AGREEMENT. FOR ORDERS PLACED OUTSIDE THE UNITED STATES OF AMERICA, PLEASE GO TO <u>http://quest.com/legal/stasspx</u> TO VIEW THE APPLICABLE VERSION OF THIS AGREEMENT FOR YOUR REGION. IF YOU DO NOT AGREE TO THE TERMS AND CONDITIONS OF THIS AGREEMENT OR THE APPLICABLE VERSION OF THIS AGREEMENT FOR YOUR REGION, DO NOT DOWNLOAD, INSTALL OR USE THIS PRODUCT. IF YOU HAVE A SIGNED AGREEMENT WITH PROVIDER THAT IS SPECIFICALLY REFERENCED IN AN ORDER THAT IS EXECUTED BETWEEN YOU AND PROVIDER, THEN THAT SIGNED AGREEMENT WILL SUPERSEDE THIS AGREEMENT.	
	<ul> <li>This Software Transaction Agreement (the "Agreement") is made between you, the Customer ("Customer" or "You") and Provider, as defined below.</li> <li>1. Definitions. Capitalized terms not defined in context shall have the meanings assigned to them below: <ul> <li>(a) "Affiliate" means any legal entity controlling, controlled by, or under common control with a party to this Agreement, for long as such control relationship exists.</li> <li>(b) "Appliance" means a computer hardware product upon which the Software is pre-installed and delivered.</li> </ul> </li> </ul>	
	<ul> <li>(c) "<i>Opcumentation</i>" means the user manuals and documentation that Provider makes available for the Software, and copies of the foregoing.</li> <li>(d) "eStore" means Provider's online Software ordering system located at <u>http://quest.com/shop/</u>.</li> <li>(e) "License Entitlements" means the quantities and versions of Products licensed to Customer, the new versions at the software ordering system located at http://quest.com/shop/.</li> </ul>	
Metalogix	☑ I accept the terms of the license agreement. Next > Cance	4

Read the **Software Transaction Agreement**. If you wish to proceed, select the **I accept the terms of the license agreement** check box.

6. Click Next. The Installation Mode window opens. Select the Advanced installation option

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

7. Click Next. The Installation Components window opens.

Archive Manager Installation Wi	fizard	×
WELCOME PLANNING	Installation Components	<u>Help</u>
INSTALLATION TOOLS SETUPS	Component       Setup version         HSM       8.5.0.100         Archive Manager for Files       8.5.0.100         Archive Manager for Exchange       8.5.0.100         Archive Manager Search       8.5.0.100         Archive Web       8.5.0.100	Installed version
Metalogix	Archive parallel messages in real time, as needed, to on-premises, hybrid or cloud locations. Users can search through archived emails and restore them in one-click. Installation folder: C:\Program Files (x86)\Metalogix           C.\Program Files (x86)\Metalogix	Browse

Select Archive Manager for Exchange.

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

ArchiveWeb is described in the *Metalogix®* Archive Manager for Exchange ArchiveWeb Guide.

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

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

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.

Archive Manager Installation Pa	ckage		×
WELCOME	Checking Prerequisites	Help	2
PLANNING INSTALLATION	.NET Framework .NET Framework 3.5 SP1 was detected.	<b></b>	^
TOOLS			
SETUPS	Microsoft Data Access Components Version 10.0 of MDAC was detected.		
	MAPI MAPI subsystem found. Microsoft Outlook is installed.		
	Microsoft Windows Features And Roles Missing features: Web Server, HITTP Redirection, Dynamic Content Compression, Windows Authentication, Basic Authentication, IIS 6 Metabase, Management Service, ASP.NET 4.5, .NET Extensibility 4.5, ASP.NET 4.5, ASP.NET 3.5, WCF HITP activation, Static Content Install	3	
	OLE DB Driver for SQL Server OLE DB Driver for SQL Server is missing from the computer. Please install the required driver: OLE DB Driver 18 for SQL Server	<b>(2)</b>	
Metalogix	Install < Back Next >	Cancel	*

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.

Scroll down to the bottom of the window. Click **Validate your license**. The *Activate License Key* dialog opens.

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

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

10. In the **Checking Prerequisites** window, click **Next**. The *Superuser Account* window opens.

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

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

Archive Manager Installation W	izard			×
WELCOME	Database Server Connection			<u>Help</u>
INSTALLATION	Please fill in all values which will be used to create a connection to	your Database S	erver.	
TOOLS	Component		DB Server	
SETUPS	Archive Manager for Exchange		MSSQL	
	Archive Manager Multitenant		MSSQL	
	Archive Manager Auditing		MSSQL	
	Authentication     Authentication	Integrated Wind	ows Authentication	
	UserLogin Password			
	Server instance     Schema name	dbo		
	Server name Database name	AMXDB		
	Authentication			
	Authentication type			
Metalogix			< Back	Next > Cancel

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

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

Enter the database parameter values described below:

For Microsoft SQL Server

- a. Authentication database authentication method.
- b. UserLogin Username if SQL Authentication or Oracle client is selected. Otherwise this field is deactivated.
- c. **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.

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

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

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

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

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

In the **Search server** field enter the name of the server where the Archive Manager Search feature is installed. For example **AMXHSM**.

14. Click **Next**. The *Firewall Settings* window opens.

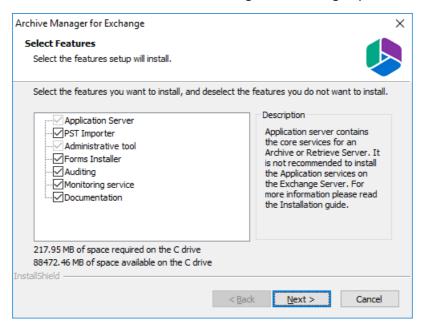
Archive Manager Installation With the second sec	izard	×
WELCOME	Firewall Settings	<u>Help</u>
PLANNING		
INSTALLATION	☑ Allow programs to communicate through Windows Firewall	
TOOLS	Price programs to communicate mough windows mewain	
SETUPS		
Metalogix	< Back Next > Ca	ancel

Select the **Allow programs to communicate through Windows Firewall** check box. Metalogix Archive Manager for Exchange features will be then able to communicate through the firewall.

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

Archive Manager Installation Wi	izard	×
<ul> <li>Archive Manager Installation W</li> <li>WELCOME</li> <li>PLANNING</li> <li>INSTALLATION</li> <li>TOOLS</li> <li>SETUPS</li> </ul>	Zummary Installation         This is the installation summary.         Components to be installed:         Product name: Archive Manager for Exchange Version: 8.5.100         Installation folder: C:\Program Files (x86)\Metalogix	X Helo
	✓ Manage the Organizational Forms Library         ✓ Start Metalogix Archive Manager for Exchange	~
Metalogix	< Back Install > Ca	ancel

- a. Select **Manage the Organizational Forms Library** if your organization uses this public folder to share email templates. Otherwise, clear the check box.
- b. Select the check box **Start Metalogix Archive Manager for Exchange** to open the Archive Manager for Exchange Administration Center (AMAC) when the installation completes.
- 16. Click Install to start the installation.
- 17. When the installer starts installing the Archive Manager for Exchange feature, the *Select Features* window of the Archive Manager for Exchange opens.



**Mandatory features** 

- Application Server
- Administrative tool

#### **Optional features**

- Auditing
- Monitoring service

#### **Optional resources**

- PST Importer
- Forms Installer
- Documentation

Keep the default selections to experience the full range of features. Then click **Next** to install the features.

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

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

- 19. Click **Finish** to complete the installation step.
- 20. The Archive Manager for Exchange Administration Center (AMAC) should open automatically if the check box **Start Metalogix Archive Manager for Exchange** was checked in the *Summary Installation* step of the installation wizard.
- 21. The Address Book Setup wizard opens automatically for a new installation. Click **Close** to exit the wizard. Then close the Address Book Manager window that opens. For advanced installation, Address Book setup can be done at a later step. For more information see <u>Setup</u> the Address Book.

#### Steps to configure and verify the Archive server

1. If the AMAC is not already open, click **Start > Archive Manager for Exchange**. The AMAC opens.

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

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

2. Open Start > Metalogix > Archive Manager Configuration. The Configuration wizard opens.

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

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

🞇 Configuration				
Configure Audit	ing		Database	Connection Logtargets
Auditing	😽 Database conne	ection	Database	Connection Logtargets
Jusers	Provider: Server name:	Microsoft SQL Server AMXDB		
T Exchange Archive	Initial catalog: Schema name:	MAMAUDIT dbo		
	User name:	(Windows Authentication)		Configure
	Database version: Scripts version:	8.5.0.27 8.5.0.27		
RA	🥝 Your database	is up to date.		
				Run scripts

Verify that the values are as expected.

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

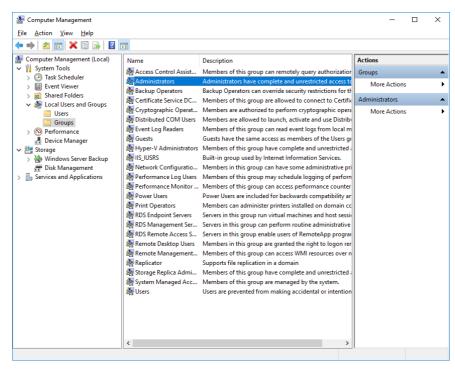
😤 Configuration			= = X
Configure Users	s		Database SMTP Configuration
Auditing	Database com	ection	
	Provider:	Microsoft SQL Server	
Users 🕨 🕨	Server name:	AMXDB	
T Exchange Archive	Initial catalog:	MAMUSER	
Orchive 💟	Schema name:	dbo	
	User name:	(Windows Authentication)	
			Configure
	Scripts		
	Database version:	8.5.0.43	
	Scripts version:	8.5.0.43	
	🥝 Your database	is up to date.	
50			Run scripts

Verify that the values are as expected.

5. From the navigation panel, click **Exchange Archive**. The *Configure Exchange Archive* window opens and the **Database** tab is displayed by default. Verify that the values are as expected.

😤 Configuration			
Configure Exch	ange Archive		Database
Auditing	Database conn Provider:	ection Microsoft SQL Server	
of Users	Server name:	AMXDB	
Exchange Archive	Initial catalog: Schema name: User name:	MAMEXCH dbo (Windows Authentication)	
	Scripts		Configure
<i>a</i> .	Database version: Scripts version:	8.5.0.187 8.5.0.187 is up to date.	
NY.			Run scripts

- 6. Close the *Configuration* wizard.
- Open Start > Windows Administrative Tools > Computer Management. The Computer Management console opens.
- 8. From the Console Tree, expand Local Users and Groups.
- 9. Click the **Groups** node to display the list of groups.



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

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

Verify that the superuser account is listed in the *Members* panel. For example, **DEMOCORP\mamadmin** 

11. Click **OK** to close the properties window, and then close the *Computer Management* console.

### Install the Retrieve server

In this topic:

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

#### Worksheet for this installation

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

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

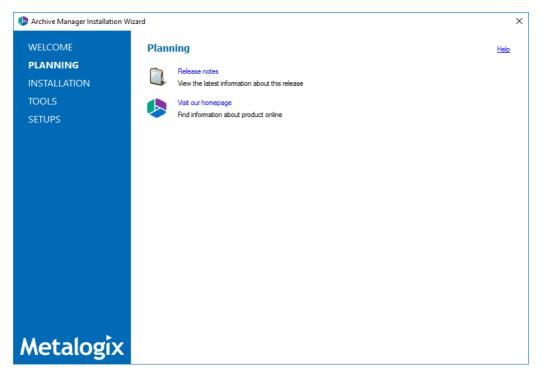
	don't have a license key, contact your Quest representative.	neither an active nor an expired license key)
Archive manager for Exchange server	The server where the Archive Manager for Exchange will be installed with the <i>Retrieve</i> role.	AMXSERVER-R
Installer account	Windows account that is used to install the application. This is usually the enterprise administrator.	username: democorp\domadmin password: ************
Superuser account	Windows account that is used to install the application and run the Archive Manager for Exchange services.	username: democorp\mamadmin password: ************
Media Folder	Full path of the folder where the media files are extracted	C:\Metalogix
Installation folder	Full path of the folder where the application files will be installed	C:\Program Files (x86) \Metalogix
Database Authentication method	Type of database authentication: Integrated Windows Authentication or SQL Authentication	Integrated Windows Authentication
UserLogin	Username if <i>SQL Authentication</i> is selected	dbadmin
Password	Database password if <i>SQL</i> <i>Authentication</i> is selected	*****
Database server	The database server instance name where the databases for Archive Manager for Files will be installed.	AMXDB
HSM server	The server where HSM is installed.	AMXHSM
Search server	The server where the Archive Manager Search is installed.	AMXHSM

#### Steps to install Metalogix Archive Manager for Exchange

- 1. Log in to the server with the credentials of the **enterprise administrator** (eg. **democorp\domadmin**).
- 2. Run the Metalogix Archive Manager Installation Package to extract the files to a local folder.
- 3. If the installer does not start immediately, run the **MAMInstaller.exe** from your install media folder. The *Welcome* window opens.



4. From the navigation panel on the left, click **PLANNING**. The *Planning* window opens.



Review the requirements and release notes. If necessary, visit the Quest website for more information.

5. From the navigation panel on the left, click **INSTALLATION**. The *Server Installation* window opens.

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

Read the **Software Transaction Agreement**. If you wish to proceed, select the **I accept the terms of the license agreement** check box.

6. Click Next. The Installation Mode window opens. Select the Advanced installation option

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

7. Click Next. The Installation Components window opens.

Archive Manager Installation Wi	zard	×
WELCOME PLANNING	Installation Components	<u>Help</u>
INSTALLATION TOOLS SETUPS	Component         Setup version           HSM         8.5.0.10           Archive Manager for Files         8.5.0.10	0
	Archive Manager for Exchange       8.5.0.10         Archive Manager Search       8.5.0.10         ArchiveWeb       8.5.0.10	0
	Product description: Reduce the storage footprint of your email archives without the complexity. Archive parallel messages in real time, as needed, to on-premises, hybrid or cloud locations. Users can search through archived emails and restore them in one-click.	
Metalogix	Installation folder: C:\Program Files (x86)\Metalogix           < Back         1	Browse Next > Cancel

Select Archive Manager for Exchange.

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

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

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.

Archive Manager Installation Pa	ckage	×
WELCOME	Checking Prerequisites	<u>Help</u>
PLANNING INSTALLATION TOOLS	.NET Framework .NET Framework 3.5 SP1 was detected.	È î
SETUPS	Microsoft Data Access Components Version 10.0 of MDAC was detected.	Ł
	MAPI MAPI subsystem found. Microsoft Outlook is installed.	Ł
	Microsoft Windows Features And Roles Missing features: Web Server, HTTP Redirection, Dynamic Content Compression, Windows Authentication, Basic Authentication, IIS 6 Metabase, Management Service, ASP-NET 4.5, .NET Extensibility 4.5, ASP-NET 4.5, ASP-NET 3.5, WCF HTTP activation, Static Content Instal	2
	OLE DB Driver for SQL Server OLE DB Driver for SQL Server is missing from the computer. Please install the required driver: OLE DB Driver 18 for SQL Server	
Metalogix	Install Sack Next > 0	↓ Cancel

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.

Scroll down to the bottom of the window. Click **Validate your license**. The *Activate License Key* dialog opens.

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

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

10. In the **Checking Prerequisites** window, click **Next**. The *Superuser Account* window opens.

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

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

Archive Manager Installation W	izard			×
WELCOME	Database Server Connection			<u>Help</u>
INSTALLATION	Please fill in all values which will be used to create a connection to	your Database S	erver.	
TOOLS	Component		DB Server	
SETUPS	Archive Manager for Exchange		MSSQL	
	Archive Manager Multitenant		MSSQL	
	Archive Manager Auditing		MSSQL	
	Authentication     Authentication	Integrated Wind	ows Authentication	
	UserLogin Password			
	Server instance     Schema name	dbo		
	Server name Database name	AMXDB		
	Authentication			
	Authentication type			
Metalogix			< Back	Next > Cancel

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

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

Enter the database parameter values described below;

For Microsoft SQL Server

- a. Authentication database authentication method.
- b. UserLogin Username if SQL Authentication or Oracle client is selected. Otherwise this field is deactivated.
- c. **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.

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

Archive Manager Installation With the second sec	izard		×
WELCOME PLANNING	Hierarchical Storage Manager Settin	gs	<u>Help</u>
INSTALLATION TOOLS	The Hierarchical Storage Manager (HSM) stores the archived of the Single Instance Function so that indentical files are stored of occur in the file system. HSM settings for installed components		
SETUPS	Component Archive Manager for Exchange	HSM server name AMXHSM	
Metalogix		< Back Next > Ca	incel

Specify the parameter values as described below:

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

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

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

Specify the parameter values as described below:

- a. Search server name of the server where the Archive Manager Search feature is installed. For example **AMXHSM**.
- 14. Click **Next**. The *Firewall Settings* window opens.

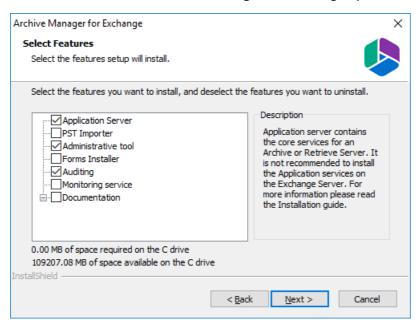
schive Manager Installation Wizard		
WELCOME	Firewall Settings	<u>Help</u>
PLANNING		
INSTALLATION	Allow programs to communicate through Windows Firewall	
TOOLS	Priore programs to communicate unough remotes a newall	
SETUPS		
Metalogix	< Back Next > C	ancel

Select the Allow installation package to change the firewall settings check box. Metalogix Archive Manager for Exchange features will be then able to communicate through the firewall.

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

leader Installation Wi	zard	×
WELCOME PLANNING	Summary Installation	<u>Help</u>
INSTALLATION TOOLS	This is the installation summary. Components to be installed: Product name: Archive Manager for Exchange Version: 8.5.100	^
SETUPS	Installation folder: C:\Program Files (x86)\Metalogix	
	Manage the Organizational Forms Library Start Metalogix Archive Manager for Exchange	
Metalogix	< Back Install > C	ancel

- a. Select **Manage the Organizational Forms Library** if your organization uses this public folder to share email templates. Otherwise, clear the check box.
- b. Select the check box **Start Metalogix Archive Manager for Exchange** to open the Archive Manager for Exchange Administration Center (AMAC) when the installation completes.
- 16. Click Install to start the installation.
- 17. When the installer starts installing the Archive Manager for Exchange feature, the *Select Features* window of the Archive Manager for Exchange opens.



Only the following features are required

- Application Server
- Administrative tool
- Auditing

Click **Next** to install the features.

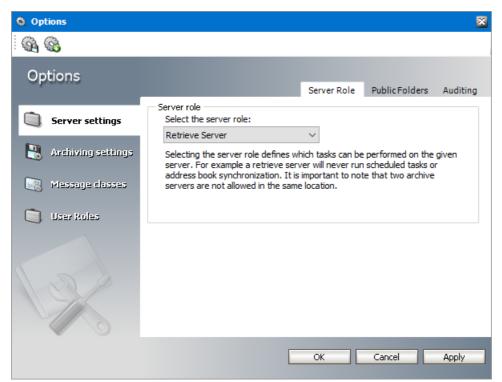
18. Click **Next** to continue the installation. If a feature installation fails or completes with a warning, expand the row to view and address the problem.

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

- 19. Click **Finish** to complete the installation step.
- 20. The Archive Manager for Exchange Administration Center (AMAC) should open automatically if the check box **Start Metalogix Archive Manager for Exchange** was checked in the *Summary Installation* step of the installation wizard.
- 21. The *Address Book Setup* wizard opens automatically for a new installation. Click **Close** to exit the wizard. Then close the Address Book Manager window that opens.

#### Steps to configure and verify the Retrieve server

- 1. If the AMAC is not already open, click **Start > Archive Manager for Exchange**. The AMAC opens.
- 2. From the **Tools** menu select **Options**. The *Options* window opens.



- 3. From the Select the server role drop down list, select Retrieve Server.
- 4. Click **OK** to set the server role and close the window.

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

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

5. Open Start > Metalogix > Archive Manager Configuration. The Configuration wizard opens.

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

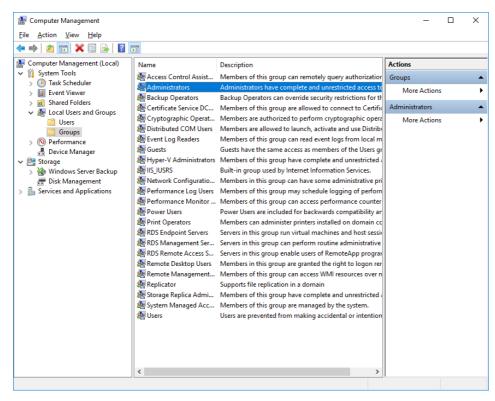
6. From the navigation panel, click **Users**. The *Configure Users* window opens and the **Database** tab is displayed by default. Verify that the values are as expected.

🛠 Configuration				- C ×
Configure Users	;		Database	SMTP Configuration
Users Exchange Archive	Provider: Server name: Initial catalog: Schema name:	Microsoft SQL Server AMXDB MAMUSER dbo		
Ŋ	User name: Scripts Database version: Scripts version: Q Your database i	(Windows Authentication) 8.5.0.43 8.5.0.43 is up to date.		Configure

7. From the navigation panel, click **Exchange Archive**. The *Configure Exchange Archive* window opens and the **Database** tab is displayed by default. Verify that the values are as expected.

🛠 Configuration			
Configure Exch	ange Archive		Database
🛐 Users	Database conn		
Exchange Archive	Provider: Server name:	Microsoft SQL Server AMXDB	
	Initial catalog: Schema name: User name:	MAMEXCH dbo (Windows Authentication)	
	Scripts	(windows Autochteation)	Configure
	Database version: Scripts version:	8.5.0.187 8.5.0.187	
$\langle \rangle$	🥝 Your database	is up to date.	Execute scripts
$\sim$			

- 8. Close the *Configuration* wizard.
- Open Start > Windows Administrative Tools > Computer Management. The Computer Management console opens.
- 10. From the Console Tree, expand Local Users and Groups.
- 11. Click the **Groups** node to display the list of groups.



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

Administrators Pro	perties			?	Х
General					
Administ	rators				
Description:	Administrators to the compute		ete and unrestricte	ed acce	<b>SS</b>
Members:	\Domain Admin	IS			
A <u>d</u> d	<u>R</u> emove		a user's group n active until the ne n.		
(	OK (	Cancel	<u>A</u> pply	He	lp

Verify that the superuser account is listed in the *Members* panel. For example, **DEMOCORP\mamadmin** 

13. Click **OK** to close the properties window, and then close the *Computer Management* console.

# **Manual Installation**

Manual installation gives you a more granular control over the installation process. Manual installation does not use the integrated installer wizard that was used to demonstrate *Express installation* in the *Quick Start Guide* or the *Advanced installation* described in the <u>Advanced Installation</u> chapter in this guide. This chapter describes in detail the manual steps required to prepare the servers, install the Metalogix Archive Manager for Exchange features by using the individual installers for each feature, and the manual steps to setup the databases and configure the features to communicate with each other as described in the <u>Deployment Plan</u>.

In this chapter:

- <u>Setup the Superuser Account</u>
- Modify the Exchange server throttling policy
- <u>Setup the Organizational Forms Library</u>
- Prepare the Metalogix Archive Manager for Exchange Servers
  - o Steps to download the install media
  - o Steps to install the prerequisites
  - o Steps to assign DCOM access and launch permissions
  - o Steps to install Microsoft Outlook
- Install Metalogix Archive Manager for Exchange
  - o Install HSM
  - o Install Archive Manager Search
  - o Install the Archive server
  - o Install the Retrieve server
- **NOTE:** The installation and configuration of optional features are described in detail in the guides published for each feature.

For next steps after you complete the manual installation, see Application Configuration.

## **Setup the Superuser Account**

A superuser account is a windows account with administrator privileges to work with Metalogix Archive Manager for Exchange administration tools, run services, manage databases, manage extensions. It also has elevated privileges to interact with the on-premise or online Microsoft Exchange servers.

In this topic:

- 1. Steps to create the superuser account
- 2. Steps to grant the superuser read permission for the Container node in the domain controller
- 3. Steps to add the superuser to the Administrators group in feature servers
- 4. <u>Steps to add the superuser as a database user with sysadmin role</u> (for Windows authentication only)
- 5. Steps to create a mailbox for the superuser in the Exchange server
- 6. Steps to grant the superuser elevated roles and permissions in the Exchange server
- 7. Steps to grant the superuser impersonation rights in the Exchange server (for OWA)

### Steps to create a superuser account

- 1. Log in to the domain controller.
- 2. Navigate to Start > Windows Administrative Tools > Active Directory Users and Computers.
- 3. From the Console Tree, expand the domain node.
- 4. Click the **Users** container. The list of users opens in the right-hand pane.
- 5. Click the **Action** menu and select **New** > **User**. The *New Object User* window opens.

lew Object - User		>	
Create in:	democorp.com/Users		
<u>F</u> irst name:	MAM Initials:		
Last name:	Administrator		
Full n <u>a</u> me:	MAM Administrator		
User logon name:			
mamadmin	@democorp.com ~		
User logon name (pre	- <u>W</u> indows 2000):		
DEMOCORP\	mamadmin		
	< Back Next > Cance		

- 6. Verify that **Create in** title indicates the appropriate domain name and container, and then enter the details of the superuser. For example:
  - a. Full name: MAM Administrator
  - b. User logon name: mamadmin@democorp.com
- 7. Click Next.
- 8. Enter the password and confirm it. Then select **Password never expires**. Uncheck all other check boxes.
- 9. Click Next.

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

10. Verify the information and click **Finish**.

# Steps to grant the superuser read permission for the Container node in the domain controller

Microsoft Exchange servers and other information stores are created as child nodes under the *CN=Services, CN=Configuration, DC=<root domain>* node in the domain controller. The superuser needs sufficient permissions to read the list of Exchange servers and information stores of the organization. A read permission must be granted to the superuser to be able to access the object and all its descendant objects.

- 1. Log in to the domain controller.
- 2. Navigate to Start > Windows Administrative Tools > ADSI Edit.
- 3. Click the Action menu, and then click Connect to. The Connection Settings window opens.

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

- 4. In the *Connection Point* frame, choose **Select a well known Naming Context**. From the drop down list select **Configuration**.
- 5. Click **OK**. The **Configuration** context appears in the ADSI editor.
- 6. Expand or select the **Configuration** context to display the node (begins with *CN=Configuration*).
- 7. Right-click the node and select **Properties**.
- 8. In the properties window, click the **Security** tab, and then click **Add**.
- 9. In the Enter the object name to select field, enter the user logon name of the super user. For example, enter democorp\mamadmin.
- 10. Click **Check Names** to verify the logon name.

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

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

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

- 12. Click Advanced. The Advanced Security Settings for Configuration window opens.
- 13. From the *Permissions* tab, select the superuser, and then click **Edit**. The *Permission Entry for Configuration* window opens.
- 14. In the Applies To drop down select This object and all descendant objects.
- 15. Click **OK**, and then click **OK** in each parent window to close all the windows.
- 16. Close the ADSI editor.

# Steps to add the superuser to the Administrators group in feature servers

The superuser must be able to run windows services and accomplish tasks that require administrator privileges on the Metalogix Archive Manager for Exchange feature servers. Follow the steps described below to grant administrator privilege to the superuser on each feature server.

- 1. Log in to each server with its local administrator credentials.
- 2. Navigate to Start > Windows Administrative Tools > Computer Management
- 3. From the Console Tree, navigate to the **System Tools** > **Local Users and Groups** > **Groups** container.
- 4. From the list of groups in the right-hand pane, right-click **Administrators** and select **Properties** from the context menu. The *Administrators Properties* window opens.
- 5. Click **Add**.
- 6. In the Enter the object name to select field, enter the user logon name of the super user. For

example, enter sales\mamadmin

7. Click **Check Names** to verify the logon name.

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

- 8. Click **OK** to add the superuser to the Administrator group.
- 9. In the Administrators Properties window, click Apply and OK to complete the process.
- **TIP:** Log out of the server and log in again with the superuser's credentials to quickly verify that the superuser can access the server.

# Steps to add the superuser as a database user with sysadmin role

If you plan to use *Windows authentication* with a Microsoft SQL Server database, follow the steps described below:

- 1. Log in to the database server with your database administrator credentials.
- 2. Open the SQL Server Management Studio on your SQL server database server.
- 3. Log in to the server instance for Metalogix Archive Manager for Exchange databases.
- 4. Open the Security folder.
- 5. Right-click on the **Logins** folder and select **New Login**. The *Login New* user properties window appears.
- 6. If you want to assign rights to a Windows account, select Windows authentication.
- 7. Provide the login name in the text box. You can use the **Browse** button to select an existing account if you chose Windows authentication (eg. **democorp\mamadmin**)
- 8. In the user properties window, click **Server Roles** from the *Select a page* panel and select the check box **Sysadmin.**
- 9. Click **OK** to create the account.
- **NOTE:** Follow the above steps to add the installer account (eg. **democorp\domadmin**) with

the Sysadmin role.

# Steps to create a mailbox for the superuser in the Exchange server

- 1. Open the *Exchange Administrative Center (EAC)* with your exchange administrator credentials.
- 2. Navigate to recipients > mailboxes
- 3. Click + and select the **User mailbox** option from the menu. The *new user mailbox* page opens.
- 4. Select **Existing user** and then click **Browse**. The *Select User Entire Forest* page opens.
- 5. If you don't see the superuser in the list, search for the name. Select the superuser and click **OK**.

💐 User Mailbox - Google Chrome 📃	D X
amxexch/ecp/UsersGroups/NewMailboxOnPremises.aspx?pwmcid	=11&
new user mailbox	
Alias:	
Existing user MAM Administrator X Browse	
New user First name:	
First name:	
l Initials:	
Last name:	
*Display name:	
*Name:	
Organizational unit:	
Browse	•
Save Cancel	

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

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

# Steps to grant the superuser elevated roles and permissions in the Exchange server

Archive Manager for Exchange requires that the super-user be granted some administrative permissions and access to the mailboxes which will be archived. The steps described below use Powershell scripts to grant the roles and permissions to the superuser. To grant roles and permissions to the superuser, follow the steps described below:

- 1. In Exchange Server, open the Exchange Management Shell.
- 2. Grant the roles and to ensures that the mailboxes and public folders can be accessed using the required administrative privileges.
  - a. Grant the Organization Management role

```
Add-RoleGroupMember -Identity "Organization Management" -Member "mamadmin@democorp.com"
```

#### b. Grant the View-Only Organization Management role.

```
Add-RoleGroupMember -Identity "View-Only Organization Management" - Member "mamadmin@democorp.com"
```

c. Grant the Public Folder Management role.

```
Add-RoleGroupMember -Identity "Public Folder Management" -Member "mamadmin@democorp.com"
```

d. Grant Receive-As permissions to all mailboxes

```
Get-MailboxDatabase | Add-ADPermission -User "mamadmin@democorp.com" -
AccessRights ExtendedRight -ExtendedRights Receive-As, ms-Exch-Store-
Admin -InheritanceType "All"
```

# Steps to grant the superuser impersonation rights in the Exchange server

This step is required if you plan to access archived emails through OWA.

- **NOTE:** To install and configure the OWA extension for Metalogix Archive Manager for Exchange, you must run the *Archive Manager OWA Extension Setup* on Exchange Server. For more information see the *OWA Installation Guide*.
- 1. In Exchange Server, open the Exchange Management Shell.
- 2. Grant the Impersonation permission

```
New-ManagementRoleAssignment -Name "Impersonation-MAM4Exchange" -Role
"ApplicationImpersonation" -User "srv exchange"
```

# Modify the Exchange server throttling policy

Exchange Server uses client throttling policies to track the bandwidth that each user consumes, and restricts bandwidth limits as necessary. Metalogix Archive Manager for Exchange needs more resources than the allowed limit, so the throttling policy must be changed for the superuser.

To change the throttling policy in the Exchange server (for example, AMXEXCH), open the *Exchange Management Shell* and run the following commands:

```
New-ThrottlingPolicy AMXEXCH
```

Set-ThrottlingPolicy AMXEXCH -EwsCutoffBalance Unlimited -EwsMaxBurst Unlimited -EwsMaxConcurrency Unlimited -EwsMaxSubscriptions Unlimited -EwsRechargeRate Unlimited -RcaMaxConcurrency Unlimited -RcaCutoffBalance Unlimited -RcaMaxBurst Unlimited -RcaRechargeRate Unlimited -CpaMaxConcurrency Unlimited -CpaCutoffBalance Unlimited -CpaMaxBurst Unlimited -CpaRechargeRate Unlimited

Set-Mailbox "mamadmin@democorp.com" -ThrottlingPolicy AMXEXCH

# **Setup the Organizational Forms Library**

Metalogix Archive Manager for Exchange stores email templates in a system folder called the Organizational Forms Library. The templates are used to display archived emails to end users. Before you can create the Organizational Forms Library folder in your Exchange server, you must first create a *public folder mailbox*. Public folder mailboxes contain the hierarchy information as well as the content for public folders. The first public folder mailbox that you create in the organization is the primary hierarchy mailbox, which automatically sets up two folders: the IPM\_SUBTREE and the NON\_IPM\_SUBTREE. An Organizational Forms Library is a system folder that

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is stored in the public folder called the EFORMS REGISTRY which is a sub-folder of the NON\_IPM\_SUBTREE system folder. There can be several forms libraries, one for each language.

In this topic:

- Steps to create a public folder mailbox
- <u>Steps to create the public folder Organization Forms Library</u>
- Steps to add the superuser as the owner of the Organizational Forms Library
- Verify that the superuser has access to the Organizational Forms Library

# Steps to create a public folder mailbox

- **i NOTE:** This must be a *primary hierarchy mailbox* which is the first public folder mailbox in the organization and hosts the primary hierarchy. The primary hierarchy is the only writable copy of the hierarchy.
- 1. Open the *Exchange Administrative Center (EAC)* with your exchange administrator credentials.
- Navigate to Public folders > Public folder mailboxes, and then click the new public folder mailbox icon +

Public P	older Mailbo	<ul> <li>Internet Explo</li> </ul>	orer	_		x
new public folder mailbox						
The first public folder mailbox created will folder hierarchy. *Name:	contain the writa	ble copy of the publ	ic			
PFMBX-DEMOCORP						
Organizational unit:						
democorp.com	×	Browse				
Mailbox database:			_			
Mailbox Database 0748581819	×	Browse				
			Save	Cano	el	
					100%	•

- 3. In the **new public folder mailbox** window that opens, enter the following information:
  - a. Name: Enter the name for the public folder mailbox. For example, enter **PFMBX-DEMOCORP**
  - b. **Organizational unit**: Click Browse to select the location in the Active Directory where the mailbox object is created. If you don't select an organizational unit, the public folder mailbox will be created in the default container for mailboxes.

- c. **Mailbox database**: Click Browse to select the mailbox database where the mailbox is created. If you don't select a mailbox database, it will be automatically assigned.
- 4. Click Save.
- 5. Verify that the mailbox appears in the public folder mailbox list.

# Steps to create the public folder Organization Forms Library

- 1. In Exchange Server, open the Exchange Management Shell.
- 2. To create a new public folder in the NON\_IPM\_SUBTREE directory that's named Organizational Forms Library, run the following command:

```
New-PublicFolder -Path "\NON_IPM_SUBTREE\EFORMS REGISTRY" -Name "Organizational Forms Library"
```

3. To set the locale ID on the folder that you created, run the following command:

```
Set-PublicFolder "\NON_IPM_SUBTREE\EFORMS REGISTRY\Organizational Forms Library" -EformsLocaleID EN-US
```

4. To determine the correct locale ID to use, see Languagecode Field.

# Steps to add the superuser as the owner of the Organizational Forms Library

- 1. In Exchange Server, open the Exchange Management Shell.
- 2. To add the superuser as the owner of the Organizational Forms Library folder so that the superuser ca publish or create forms in the library, run the following command:
- 3. Add-PublicFolderClientPermission "\NON\_IPM\_SUBTREE\EFORMS REGISTRY\Organizational Forms Library" -User mamadmin@democorp.com -AccessRights Owner
  - **NOTE:** If you're not sure about the name of the Organizational forms library in your company, the following command can be used. It will owner rights to the child objects under EFORMS REGISTRY:

```
Get-PublicFolder -Identity "\NON_IPM_SUBTREE\EFORMS REGISTRY" -
GetChildren | Add-PublicFolderClientPermission -User
mamadmin@democorp.com -AccessRights Owner
```

4. Wait some time for replication to occur until the super-user is assigned owner rights to the Organizational Forms library.

# Verify that the superuser has access to the Organizational Forms Library

- 1. Open Outlook with the superuser account.
- 2. Click Home / New Items / More Items / Choose Form.
- 3. In the **Look in** down-drop box verify that the *Organizational Forms Library* exists.

# **Prepare the Application Servers**

In this topic:

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

See the <u>System Requirements</u> and <u>About User Accounts</u> chapters for preparing database servers.

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

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

### For the Archive server (AMXSERVER-A)

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

### For Retrieve server (AMXSERVER-R)

- Steps to download the install media
- Steps to install the prerequisites
- <u>Steps to assign DCOM access and launch permissions</u>
- <u>Steps to install Microsoft Outlook</u>
- **TIP:** We recommend completing all these tasks using the installer account.

# Steps to install the prerequisites

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

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

Archive Manager for Exchange (for Archive and Retrieve servers)

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

#### HSM

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

#### Search

Install-WindowsFeature -Name NET-Framework-Features

#### 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 <u>System Requirements</u> chapter to modify the script for other supported Windows operating systems or install them manually.
- 4. Install the database drivers. For Microsoft SQL Server, the database driver is available in the folder <installation folder>\Archive Manager Installation Package\Install.
- 5. Install the redistributable packages required for your operating system. These files are available in the folder <installation folder>\Archive Manager Installation Package\Install.

## Steps to assign DCOM access and launch permissions

#### Add the superuser to the Distributed COM Users group

- 1. Right-click Start > Computer Management.
- 2. From the *Console Tree*, go to **System tools** > **Local Users and Groups** > **Groups**.

- 3. From the *Groups* list, select an double-click **Distributed COM Users**. The *Distributed COM Users Properties* window opens.
- 4. From the *General* tab click **Add**.
- 5. In the **Enter the object name to select** field, enter the user logon name of the superuser. For example, enter **democorp\mamadmin**.

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

- 6. Click **Check Names** to verify the logon name and then click **OK** to add the superuser to the members list.
- 7. Click **OK** to close the *Distributed COM Users Properties* window, and then close the *Computer Management* console.

#### **Grant Access and Launch Permissions**

- 1. Open Start > Windows Administrative Tools > Component Services.
- 2. From the *Console Tree*, go to **Component Service** > **Computers** > **My Computer**.
- 3. Right-click **My Computer** and select **Properties** from the context menu. The *My Computer Properties* window opens.

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My Computer Properties			?	×	
General Default Protocols	Options COM Sec	Options Default Properties COM Security MSDTC			
		nine their own	n permissions. affect the abili		
[	Edit <u>L</u> imits	E	dit Default		
	allowed by default t may also set limits ermissions. difying launch and applications ecurely. Edit Limits	on application activation pe to start, con	ons that emissions can		
	ОК	Cancel	Ap	ply	

- 4. Open the **COM Security** tab and click **Edit Default**. The Access Permissions window open.
- 5. Click Add. The Select users or Groups window opens.
- 6. Click Locations and select the Archive Manager server (for example, AMXSERVER-A)
- 7. Search and add the following:
  - a. Distributed COM Users
  - **b. NETWORK SERVICE**
- 8. Select Distributed COM Users from the list.
- 9. In the *Permissions for Distributed COM Users* section, select **Allow** for both **Local Access** and **Remote Access**.
- 10. Select **NETWORK SERVICE** from the list.
- 11. In the *Permissions for Distributed COM Users* section, select **Allow** for **Local Access** only.

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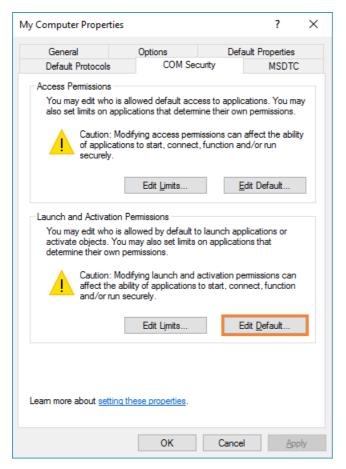
Access Permission		?	×	Access Permission		?	×
Default Security				Default Security			
Group or user names:				Group or user names:			
SELF SYSTEM NETWORK SERVICE				SELF SYSTEM NETWORK SERVICE			
Administrators (AMXSERVER-)     Distributed COM Users (AMXS	· ·	ited COM	U	Standard Administrators (AMXSERVE Standard COM Users (AM		uted COM	U
[	A <u>d</u> d	<u>R</u> emove			A <u>d</u> d	Remove	а
Permissions for Distributed COM Users	Allow	Deny		Permissions for NETWORK SERVICE	Allow	Deny	
Local Access	$\checkmark$			Local Access	$\checkmark$		
Remote Access	$\checkmark$			Remote Access			
	ОК	Can	cal		ОК	Can	

12. Click **OK** to close the *Access Permissions* window.

13. Keep the *My Computer Properties* window open and continue with the instructions below.

Grant Launch and Activation Permissions to the Distributed COM Users group

1. From the My Computer Properties window verify that the COM Security tab is opened.



- 2. Click Edit Default. The Access Permissions window open.
- 3. Click Add. The Select users or Groups window opens.
- 4. Click Locations and select the Archive Manager server (for example, AMXSERVER-A)
- 5. Search and add the following:
  - a. Distributed COM Users
  - b. NETWORK SERVICE
- 6. Select Distributed COM Users from the list.
- 7. In the *Permissions for Distributed COM Users* section, select **Allow** for **Local Launch**, **Remote Launch**, **Local Activation** and **Remote Activation**.
- 8. Select NETWORK SERVICE from the list.
- 9. In the *Permissions for Distributed COM Users* section, select **Allow** for **Local Launch** and **Local Activation** only.

Launch and Activation Permission	ı	?	×	Launch and Activation Permission	on	?	Х
Default Security				Default Security			
Group or user names: SYSTEM Administrators (AMXSERVER) Distributed COM Users (AMXS INTERACTIVE NETWORK SERVICE	· · ·	ited COM U.		Group or user names: SYSTEM Administrators (AMXSERVEI Distributed COM Users (AM) NTERACTIVE			U
Permissions for Distributed COM Users Local Launch Remote Launch Local Activation Remote Activation	Add Allow V V V	Remove Deny		Permissions for NETWORK SERVICE Local Launch Remote Launch Local Activation Remote Activation	Add Allow C C C	Remove	
	ОК	Cance			ОК	Can	cel

- 10. Click **OK** to close the Access Permissions window.
- 11. Close the *Component Services* console.

# **Steps to install Microsoft Outlook**

The Metalogix Archive Manager Server communicates with on-premise and online Microsoft Exchange servers via MAPI. To provide your Archive Manager server with a MAPI subsystem, install Outlook with full Unicode compatibility. See <u>System Requirements</u> for version compatibility with your Microsoft Exchange servers.

## Steps to download the install media

- 1. Login to the server with the credentials of the superuser (eg. democorp\mamadmin)
- 2. From your browser, navigate to the <u>https://www.quest.com/products/metalogix-archive-manager-for-exchange</u> page

or

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

- 3. Click the **Download Free Trial** button.
- 4. Fill the *Download Your Free Trial* registration form and click **Download Trial**. The file download page appears.
- 5. Download the install media zip file.
- 6. The the trial license key is specified in the email that is sent to you.

7. Ensure that the files are available locally on the computer on which you are planning to install the Metalogix Archive Manager for Exchange features.

# **Install the Application Features**

This topic describes the manual installation steps for each feature and feature that comprises a single-server installation.

In this topic:

- Install HSM
- Install Archive Manager Search (with Post-processing)
- Install the Archive server
- Install the Retrieve server

# **Install HSM**

In this topic:

- Worksheet for this installation
- Steps to install HSM
- 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.	AMXHSM
Superuser account	Windows account that is used to install the application and run the Archive Manager for Exchange services.	username: democorp\mamadmin password: ************

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

## Steps to install the application

1. Log in to the server (eg. AMXHSM) with the credentials of the superuser (eg. democorp\mamadmin)

- 2. Download the installation media. For more information see <u>Steps to download the install</u> <u>media</u>.
- 3. Run the Metalogix Archive Manager Installation Package to extract the files to a local folder.
- 4. Close the integrated installer wizard which starts automatically.
- 5. Run the HSM setup from <Media folder>\Archive Manager Installation Package\HSM\**HSM Setup.exe**
- 6. A prerequisite check occurs and missing requirements if any are displayed. Click **Install** to ensure all missing requirements are installed.
- 7. The *Welcome* window of the HSM installer opens.

HSM		×
	Welcome to the InstallShield Wizard for HSM	
	The InstallShield Wizard will install HSM on your computer. To continue, click Next.	
	< Back Next > Cancel	

8. Click Next. The Logon Information window opens.

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

Enter the information as described below:

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- a. User name logon name of the superuser (for example, democorp\mamadmin)
- b. Password logon password of the superuser
- c. Confirm password same as the Password.
- 9. Click Next. The Firewall Settings window opens.

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

Select Allow programs to communicate through Windows Firewall.

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

HSM		×
Ready to Install the Program The wizard is ready to begin installation.		
Click Install to begin the installation.		
If you want to review or change any of you exit the wizard.	ur installation settings, dick Back. Click Cano	el to
InstallShield	< <u>B</u> ack <u>I</u> nstall Ca	ancel

11. Click **Install**. The installation starts and the progress is displayed on the *Setup Status* window. When the installation completes, the *InstallShield Wizard Complete* window opens.

HSM	
	InstallShield Wizard Complete
	The InstallShield Wizard has successfully installed HSM. Click Finish to exit the wizard.
	< Back Finish Cancel

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

## Steps to configure the HSM database connection

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

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

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

Database configuration		×
Database Connection Wiz	ard	?
Set up your Microsoft SQL S	Server connection.	
Please enter parameters which will b	be used to create a connection to your Microsoft SQL Server.	
Server name:	AMXDB	
Initial catalog:	MAMHSM	
Schema name:	dbo	
Authentication:	Windows Authentication	
User name:		
Password:		
	< Back Next > C	ancel

For Microsoft SQL Server

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

#### For Oracle

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

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

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

Database configuration	×
Database Connection Wizard	<b>?</b> ?
You have successfully finished the Database Connection Wizard!	
Click on Finish to save your database connection parameters and update config files.	
If you have not done so already, you can run the database scripts to create the necessary database objects.	
<back next=""> Finis</back>	h .

7. Click Finish to close the Database Connection wizard.

## Steps to install the HSM database

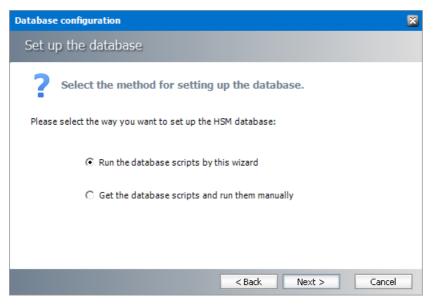
- 1. From the feature panel on the left in the *Configuration* wizard, click **HSM** and select the **Database** tab.
- 2. Verify that the database connection information is as expected. Then click **Run Scripts**. The script installer wizard opens.

Database configuration	×
Set up the database	
Specify the user under which to run database scripts.	
Please specify user under which to run database scripts. The user must be allowed to create or modify tables and procedures in the database.	
O Use the default credentials	
C Use different credentials	
Authentication: Windows Authentication *	
Database user:	
Password:	
< Back Next > Cancel	7

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

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



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

- a. **Run the database scripts by this wizard** the installer will automatically run the scripts to create the tables and procedures required for the database.
- b. Get the database scripts and run them manually you get the option to either save the scripts or copy it to clipboard and paste it elsewhere.
- 5. Click **Next**. Depending on your selection, one of the following windows open:

For Run the database scripts by this wizard

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

Select both check boxes: Create tables and Create procedures.

For Get the database scripts and run them manually

92

Database configuration	8
Set up the database	
Get the database scripts	you want to run manually.
Get the selected scripts and run them m	anually in an external application.
Tables	Procedures
Save the script	Save the script
<u>Copy to clipboard</u>	<u>Copy to clipboard</u>
	< Back Next > Cancel

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

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

Confirm		×
?	Please confirm that you have successfully completed the following database scripts:	
	✓ Tables	
	✓ Procedures	
	OK Cancel	

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

7. If the installation is successful, the confirmation dialog opens. Click OK to close the dialog. The database setup completion window opens.

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

8. Click **Finish** to close the script installer. The *Scripts* section of the *Configuration* wizard displays the status and version of the scripts(the version of the scripts you install may differ from the version shown in the image below).

🞇 Configuration						
Configure HSM	Datab	oase Stores	Advanced	Diagnostics	Encryption	Packer Tasks
🕡 нзм 🕨	Provider: Server name: Initial catalog: Schema name:	Microsoft SQI AMXDB MAMHSM dbo				
	User name: Scripts Database version: Scripts version:	(Windows Au 8.5.0.39 8.5.0.39	thentication)	,		Configure
SS.	🥺 Your database	is up to date.				Run scripts

9. Keep the *Configuration* wizard open for next steps.

## Steps to configure the HSM stores and schemas

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

Media Store Administration Wizar	rd 🛛 🔀
Create a new Media Stor	re
Choose a n	ame and type for the Media Store.
Media Store type:	Jukebox, Harddisk, Network Share 🔹
Name of the new Media Store:	FILESTORE
	< Back Next > Cancel

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

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

Enter the information as described below;

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

Media Store Administration Wizard	×
Jukebox, Harddisk, Network Sha	are
Please choose how long the PamServers. This give	
	Add Server
🚼 Add	Specify the server where this store should connect.
Connection interval between the Media	a Server type: HSM Server 🔹
	Server name: AMXHSM
	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. AMXHSM)
- 6. Click **OK** to close the window and add the the HSM Server to the list.
- 7. Click **Next**. The final configuration window appears.

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

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

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

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

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

HSM Schema	8
Create new	/ schema 🛛 😥
Store:	FILESTORE@AMXHSM
Schema name:	FILESCHEMA
Allow duplicate:	
Encryption:	<none></none>
Task:	<none> •</none>
Compression:	
Exclude files:	.gz;.zip;.rar;.jpg
	Use ";" as separator and include the "." in extensions. Example: .zip;.jpg;.rar
Packer:	<none></none>
	OK Cancel

Enter the following information:

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

😤 Configuration	
Configure HSM	Database Stores Advanced Diagnostics Encryption Packer Tasks
🕡 нѕм 🕨	Stores           Id         Name         Server         Mirror of         State           1         FILESTORE         AMXHSM         Running
	1       FILESTORE       AMXHSM       Running
a di	Id         Name         Store         Server         Force Store         Encryption Key         Compression         Task           1         FILESCHEMA         FILESTORE         AMXHSM
	🛨 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 Exchange are described in the *Media Store Administration Guide*.

## Steps to test the HSM and Media Store connectivity

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

HSM Test				×
HSM Server:	AMXHSM.dem	nocorp.com		
File identifier: Identifier type:	HsmId	O Guid		Name to FileId
	📒 Archive	📑 Retrieve 👻 Dele	te 🛛 Set retention	🔅 Mass actions 👻
				Close

3. Click Archive. The Archive window opens.

rchive	
Target schema:	FILESCHEMA (FILESTORE)
Retention time:	Fixed value     0
	C Infinite
	C Indefinite
• Use generated test files	
Unique content:	2020092723000026728376dbdad49508b431b80d988b473f0254d
Original filename:	TestFile.txt
O Use a specific test file	
Path to test file:	
Options:	✓ Make each file unique 🔲 Compress
	Use invalid checksum 🔽 Do not compress
	☐ Archive empty file ☐ Activate logging
	Archive Close

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.

R	tesuli	t		×
ſ	7	Step 1:	Success	
		HsmId:		
		Guid:		
	~	Step 2:	Success	
		HsmId:	2	
		Guid:	n/a	
	Elap	sed time:	00:00:00.2023647	
	File	size:	32.0 KB (32768 bytes)	
				ОК

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

6M Test					
HSM Server:	AMXHSM.den	nocorp.com			
File identifier:	0000001				
Identifier type:	⊙ HsmId	O Guid			<u>Name to FileId</u>
	📒 Archive	📑 Retrieve 👻	🔀 Delete	🔀 Set retention	🔅 Mass actions 🤸
					Close

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

7. Click Retrieve. The Result window opens.

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

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

## **Install Search**

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

In this topic:

For Archive manager Search

- <u>Worksheet for this installation</u>
- Steps to install Archive Manager Search (with Post Processing)
- <u>Steps to configure the Search database connection</u>
- Steps to install the Search database
- Steps to configure Search Scopes

#### **For Post Processing**

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

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

## Worksheet for this installation

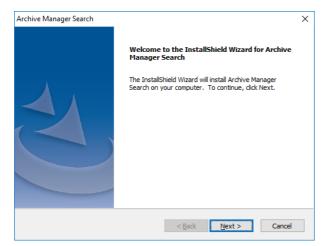
The following information will be required through the installation process. Sample values are provided here as a guidance.

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

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

## **Steps to install Archive Manager Search**

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



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

icense Agreement		
Please read the following license agreem	ient carefully.	
Press the PAGE DOWN key to see the re	est of the agreement.	
Software Transaction Agre	ement	^
DOWNLOADING, INSTALLING OR USI TO THE TERMS AND CONDITIONS ( OUTSIDE THE UNITED STATE http://guest.com//egal/sta.aspx TO AGREEMENT FOR YOUR REGION. IF	VIEW THE APPLICABLE VERSION YOU DO NOT AGREE TO THE TER T OR THE APPLICABLE VERSION	D AGREE PLACED GO TO OF THIS MS AND
	se Agreement? If you select No,	Print

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

Archive Manager	Search X
Setup Type	
Select the set	up type to install.
Please select a	a setup type.
Omplete	
	All program features will be installed. (Requires the most disk space.)
O Custom	
<b>1</b>	Select which program features you want installed. Recommended for advanced users.
InstallShield ——	
	< Back Next > Cancel

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

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

Archive Manager Search			×
Choose Destination Location			
Select folder where setup will install files.			
Please select the path for the file index			
C:\Program Files (x86)\Metalogix\MAMSea	arch\Index\File		
			Browse
InstallShield	( De de	Neuka	Control
	< <u>B</u> ack	<u>N</u> ext >	Cancel

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

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

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

rchive Manager Search			>
Logon Information Specify a user account and password.			
Specify the user account to be used by this DOMAIN\Username.	application. Use	r accounts must b	e in the format
<u>U</u> ser name:			
democorp\mamadmin			
Password:			
Confirm password:			
•••••			
stallShield			
stanorneru —	< <u>B</u> ack	<u>N</u> ext >	Cancel

Enter the information as described below:

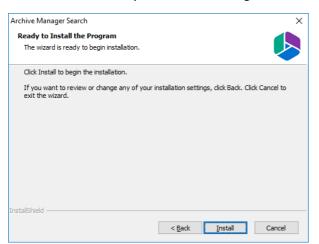
- a. User name logon name of the superuser (for example, democorp\mamadmin)
- b. Password logon password of the superuser
- c. **Confirm password** same as the Password.

13. Click **Next**. The *Firewall Settings* window appears.

Archive Manager Search	X
Firewall Settings	
☑ Allow programs to communicate through Windows	Firoual
	, m cwai
InstallShield	
<	Back Next > Cancel

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

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

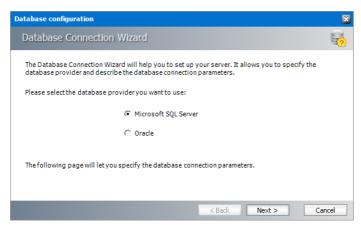


15. Click Install. The InstallShield Wizard Complete window opens.

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

### Steps to configure the Search database connection

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



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

Database configuration	×
Database Connection Wiza	ard 🤴
Set up your Microsoft SQL S	
Please enter parameters which will b	e used to create a connection to your Microsoft SQL Server.
Server name:	AMXDB
Initial catalog:	MAMSEARCH
Schema name:	dbo
Authentication:	Windows Authentication 🔹
User name:	
Password:	
	< Back Next > Cancel

For Microsoft SQL Server

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

#### For Oracle

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

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

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

Database configuration	×
Database Connection Wizard	?
You have successfully finished the Database Connection Wizard!	
Click on Finish to save your database connection parameters and update config files.	
If you have not done so already, you can run the database scripts to create the necessary database objects.	
<back next=""> Finis</back>	;h

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

## Steps to install the Search database

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

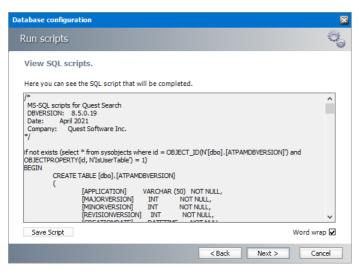
Database configuration	×
Run scripts	¢\$
Select scripts to run.	
Please select SQL scripts you want to run.	
O1_searchTables.sql	ect All
	BCC All
🗹 截 03_searchStandardValues.sql	
The following page will let you specify the user under which to run database scripts.	
< Back Next >	Cancel

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

Database configuration	×	
Run scripts	ಳು	
Specify the user under w	hich to run database scripts.	
Please specify user under which t modify tables and procedures in	to run database scripts. The user must be allowed to create or the database.	
Authentication:	Windows Authentication 🔹	
Database user:		
Password:		
☐ I want to see the SQL script before it is run (for advanced users)		
	<back next=""> Cancel</back>	

Enter the information as described below:

- a. Authentication authentication type used for the database. Choose either Windows authentication or SQL Server authentication
- a. **User name** database login user name if *SQL Server authentication* is the selected as the authentication mode.
- b. **Password** password of the database user if *SQL Server authentication* is the selected as the authentication mode.
- c. (optional) Check the I want to review the SQL Scripts check box to view the scripts.
- 5. Click **Next**. If you chose to view the SQL scripts then the *View SQL scripts* window opens. If you chose to view the Oracle scripts then the *View Oracle scripts* window opens



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

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

Database configuration	×
Run scripts	Ç.
Run SQL scripts.	
Here you can run the selected SQL scripts to set up the database.	
01_searchTables.sql	
02_searchProcedures.sql	
03_searchStandardValues.sql	
Click on Next to run scripts.	00:00
<back next=""></back>	Cancel

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

😤 Configuration					
Configure Searc	ch		Database	Search Scopes	Connectivity
🛐 ным	Database conn		Database	Search Scopes	Connectivity
🧕 Search 🕨 🕨	Provider: Server name:	Microsoft SQL Server AMXDB			
post Processing	Initial catalog: Schema name:	MAMSEARCH			
	User name:	(Windows Authentication)		C	onfigure
	Database version: Scripts version:	8.5.0.39 8.5.0.39			
$\int$	🥝 Your database	is up to date.		Ru	in scripts
P					

### **Steps to configure Search Scopes**

1. From the feature panel on the left in the *Configuration* wizard, click **Search** and select the **Search Scopes** tab.

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

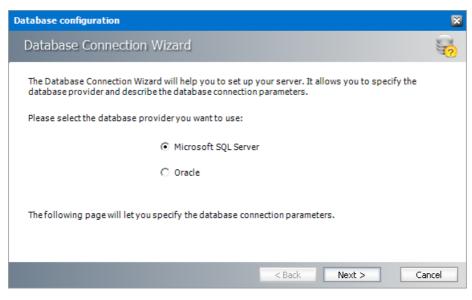
Enter the information and described below:

- a. **Server name** name of the primary Archive Manager for Exchange server (eg. AMXSERVER-A) where the role will be set to **Archive** server.
- b. **Type** Select Exchange Archive Server.
- 2. Click Next. The Connection window for the Archive database opens.
- 3. If the MAMEXCH database already exists, click Import.

-or-

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

a. Click **Configure** to setup the Archive Manager for Exchange database. 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.

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

For Microsoft SQL Server

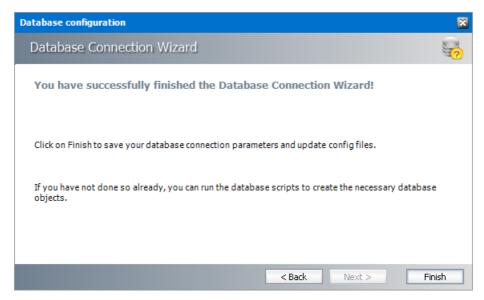
- Server name name of the SQL server (eg. AMXDB)
- Initial catalog name of the Archive Manager for Files database (e.g. MAMEXCH which is the default name of the Archive Manager for Files database)
- Schema name name of the SQL Schema (e.g. dbo)
- Authentication authentication type used for the database.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

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

d. If the database connection is setup successfully, the configuration confirmation window opens.



- e. Click Finish to close the Database Connection wizard.
- 4. The *Configuration* window for the *Archive* database reopens.

Configuration		×	
Set up the Archive database connection			
Provider:	Microsoft SQL Server		
Server name:	AMXDB.democorp.com		
Intitial catalog:	MAMEXCH		
Schema name:	dbo		
User name:	(Windows Authentication)		
Import	onfigure < Back Next >	Cancel	

- 5. Click Next. The Configuration window for the Index database opens.
- 6. 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 Archive database connection. The *Database Connection* Wizard opens.

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

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

Database configuration	8
Database Connection Wiza	ard 😽
Set up your Microsoft SQL S	erver connection.
Please enter parameters which will b	e used to create a connection to your Microsoft SQL Server.
Server name:	AMXDB
Initial catalog:	MAMINDEX
Schema name:	dbo
Authentication:	Windows Authentication
User name:	
Password:	
	<back next=""> Cancel</back>

For Microsoft SQL Server

- Server name name of the SQL server (eg. AMXDB)
- Initial catalog name of the Archive Manager for Files database (e.g. MAMINDEX 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. AMXDB)

- 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.

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

d. If the database connection is setup successfully, the configuration confirmation window opens.

Database configuration	×
Database Connection Wizard	3
You have successfully finished the Database Connection Wizard!	
Click on Finish to save your database connection parameters and update config files.	
If you have not done so already, you can run the database scripts to create the necessary database objects.	
< Back Next > Finit	sh

- e. Click **Finish** to close the *Database Connection* wizard.
- 7. The *Configuration* window for the *Index* database reopens.

Configuration		×		
Set up the Index database connection				
Provider:	Microsoft SQL Server			
Server name:	АМХДВ			
Initial catalog:	MAMINDEX			
Schema name:	dbo			
User name:	(Windows Authentication)			
Import Co	nfigure < Back Next > Cancel			

8. Click **Next**. The *Index directory* window opens.

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

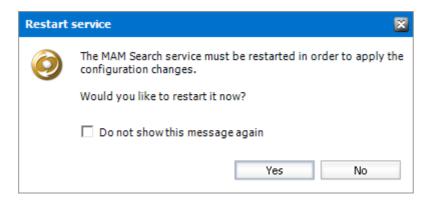
9. Click **Browse** to select or create a folder for the search index and then click **Next**. The *Apply the configuration changes* confirmation window opens.

×
_

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

🞇 Configuration				
Configure Searc	:h	Database	Search Scopes	Connectivity
бр ным до Search →	Manage search s	copes		
Post Processing				
	Configuration summa	ary Exchange Archive		
R	Server type: Server name: Database: Indexing database: Index directory:	AMXSERVER-A AMXDB.democorp.com\MAMEXCH		
	Add	Remove		Configure

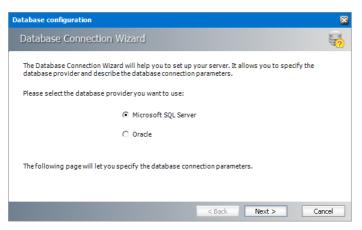
11. If the *Restart service* window opens, click **Yes** to restart the MAM service. Otherwise you must start the windows service manually.



12. Close the *Configuration* wizard.

### Steps to configure the Post Processing database connection

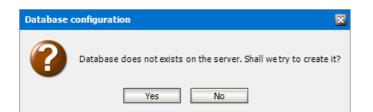
- 1. When the installation completes, the *Configuration* wizard opens. If it does not open automatically, click **Start > Metalogix > Archive Manager Configuration**.
- 2. From the feature panel on the left, click **Post Processing** and select the **Database** tab.
- 3. Click **Configure**. The *Database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



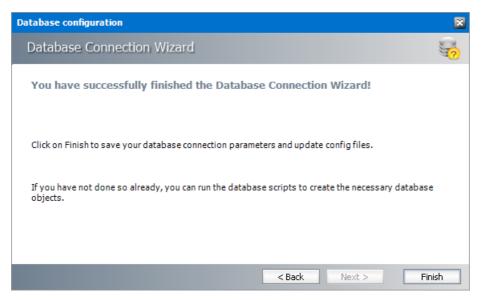
4. Click Next. The SQL Server connection window opens.

Database configuration	×
Database Connection Wizard	2
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: AMXDB	
Initial catalog: MAMINDEX	
Schema name: dbo	
Authentication: Windows Authentication 👻	
User name:	
Password:	
<back next=""> Can</back>	iel

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



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



7. Click Finish to close the Database Connection wizard.

### Steps to install the Post Processing database

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

Database configuration	×
Run scripts	¢¢
Select scripts to run.	
Please select SQL scripts you want to run.	
Select All	]
Q_ 02_indexProcedures.sql	
🗹 😡 03_indexStandardValues.sql	
The following page will let you specify the user under which to run database scripts.	
< Back Next >	Cancel

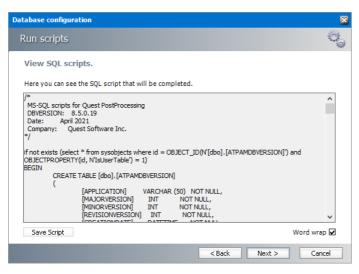
Click Select All to select all check boxes. Click Next. The View SQL scripts window opens.

3. Click Next. The run Scripts authentication window opens.

Database configuration	8
Run scripts	್ರ
Specify the user under w	hich to run database scripts.
Please specify user under which t modify tables and procedures in	to run database scripts. The user must be allowed to create or the database.
Authentication:	Windows Authentication 🔻
Database user:	
Password:	
☐ I want to see the SQL script be	fore it is run (for advanced users)
	< Back Next > Cancel

Enter the information as described below:

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

Database configuration	×
Run scripts	C.
Run SQL scripts.	
Here you can run the selected SQL scripts to set up the database.	
01_indexTables.sql	
02_indexProcedures.sql	
03_indexStandardValues.sql	
Click on Next to run scripts.	00:00
< Back Next >	Cancel

6. Click **Next**. When the status changes to *Scripts were run successfully*, click **Finish** to close the script installer. The *Scripts* section of the *Configuration* wizard displays the status and version of the scripts(the version of the scripts you install may differ from the version shown in the image below).

🛠 Configuration					
Configure Post	Processing	Database	General Settings	Post Processing Scopes	OCR Engine
🛐 ным	😼 Database conne				
👼 Search	Provider: Server name:	Microsoft SQL	Server		
Post Processing 🕨	Initial catalog: Schema name:	MAMINDEX dbo			
	User name:	(Windows Autl	hentication)	C	onfigure
	Ostabase version:	8.5.0.16			
	Scripts version:	8.5.0.16			
	🥝 Your database i	s up to date.			
				Ru	n scripts

**i IMPORTANT:** You may close the *Configuration* wizard. Click **Cancel** on any warning dialogs that may open. Additional Post Processing configuration is required but must wait until the Archive Server installation and configuration is completed. See <u>Install the Archive server</u> for next steps.

### **Steps to configure 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.

Add Post Processing scope					
Specify the server for Post Processing					
Server type:	Archive server for Exchange				
berrer cyper	Archive server for Exchange				
Server name:	AMXSERVER-A				
	OK Cancel				

Enter the information and described below:

- a. Server type select Archive server for Exchange
- **b.** Server name specify the name of the Archive Manager for Exchange server which will be the designated Archive server. For example, AMXSERVER-A
- 2. Click **OK**. If you have did not install the Archive server for Exchange yet, an error message appears

Configurat	ion 🔀
	The machine "AMXSERVER" does not contain configuration information for this product.
	ОК

3. Click **OK**. The *Configuration* window for the *Post Processing Scopes* opens.

Enter the following information:

- a. Activated select the check box to activate the Post Processing Scope for Exchange.
- b. HSM server name of the HSM server
- c. **Index directory** full path to the index directory, the default path is C:\Program Files (x86) \Metalogix\MAMSearch\Index\Mail
- d. Mailboxes index number of mailboxes that can be indexed.
- e. **Exchange database** click **Configure** and use the wizard to connect to the Archive Manager database.
- f. Plugins click Add to insert the plugins.

Configuration				×
🔀 Post Processing (	for Exchange			
Enabled		Locat	ion: 1 - Default	
HSM server:	AMXHSM			Reset
Index directory:	C:\Program Files (x86)\Metalogix	(MAMSearch \Inde	х\Mail	Browse
Mailboxes in index:	50 🛨			
😼 Exchange Datai	lase			
Provider:	Microsoft SQL Server			
Server name:	AMXSERVER-A			
Initial catalog:	МАМЕХСН			
				Configure
💖 Plugins				
Plugin Name		Active	Bookmark	Add
PostProcessPAMSearch	Index.SearchIndexPlugin	Yes	06.12.2020 07:00:2	1 Remove
				Properties
				Refresh
		OK	Cancel	Apply

4. Click **OK** to add the Post processing Scope for Archive manager for Exchange.

🞇 Configuration					
Configure Post	Processing	Database	General Settings	Post Processing Scopes	OCR Engine
auditing	🚯 Hanage Post Pro	ocessing Scopes			
可 нам	AMXSERVER				
ਗ਼ Search					
Post Processing 🕨					
	C financia				
	Configuration summ	hary			
	Server type:				
	Server name:				
	Database:				
	Index directory:				
	Add	Remove			Configure

## **Install the Archive server**

In this topic:

- Worksheet for this installation
- <u>Steps to install Archive Manager for Exchange</u>
- <u>Steps to configure the Archive Manager database connection</u>

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

### Worksheet for this installation

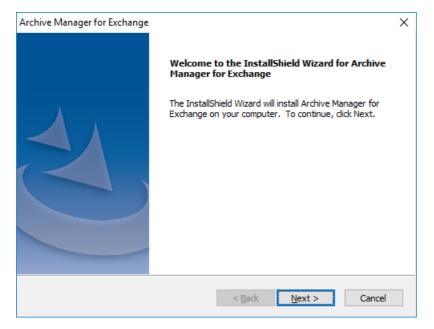
The following information will be required through the installation process. Sample values are provided here as a guidance.

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

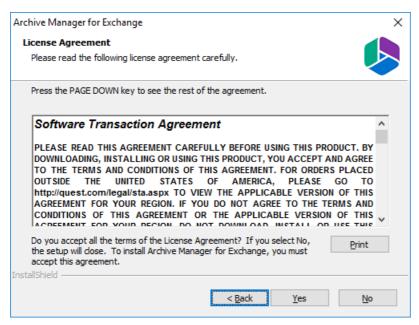
Password	Database password if <i>SQL</i> <i>Authentication</i> is selected	*****
Database server	The database server instance name where the databases for Archive Manager for Files will be installed.	AMXDB
HSM server	The server where HSM is installed.	AMXHSM
Search server	The server where the Archive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

# **Steps to install Metalogix Archive Manager for Exchange**

- 1. Login to the server with the credentials of the superuser (eg. democorp\mamadmin)
- 2. Run the Metalogix Archive Manager Installation Package to extract the files to a local folder.
- 3. Close the integrated installer wizard if it starts automatically.
- 4. Run the Archive Manager setup. The default path is C:\Metalogix\Archive Manager Installation Package\Exchange\Archive Manager for Exchange Setup.exe
- 5. A prerequisite check occurs and missing requirements if any are displayed. Click **Install** to ensure all missing requirements are installed.
- 6. The *Welcome* window of the Archive Manager for Exchange installer opens.



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



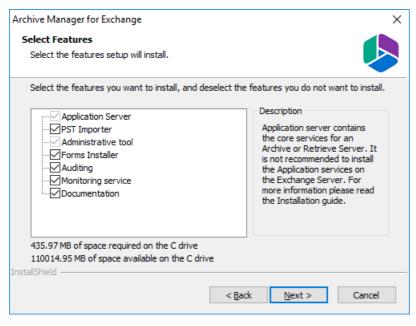
8. Click **Yes** to accept the license. The *License Key* window opens. Click **Print** if you wish to print the license agreement.

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

 If you are connected to the internet, select Online activation or see <u>License Activation</u> for more options. Click Next. When your license is activated, you will see a confirmation message and the license details. Click Finish to close the Activate License Key dialog.

Archive Ma	nager for Exchange			×
	Vestination Location Ider where setup will install files.			
	Install Archive Manager for Exchan C:\Program Files (x86)\Metalogix	ige to:		Change
InstallShield ·		< <u>B</u> ack	Next >	Cancel

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



#### **Mandatory features**

- Application Server
- Administrative tool

#### **Optional features**

- Auditing
- Monitoring service

#### **Optional resources**

- PST Importer. For more information see the *Metalogix® Archive Manager for Exchange PST Importer Guide*.
- Forms Installer
- Documentation
- 11. Click **Next**. The Archive Manager site port Information window opens.

Archive Manager for Exchange		×
Archive Manager site port Information Please define the Archive Manager site port.		
Archive Manager site port number: 80		
Note: port number should be between 1 <-> InstallShield —	65535 < <u>B</u> ack <u>Next</u> >	Cancel

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

Archive Manager for Exchange	×
Select HSM server Select the HSM server	
Type the name of the HSM server, or select it from the list of servers	
HSM server AMXHSM	Browse
Test HSM server	_
	<u>T</u> est server
The setup successfully established a connection with the HSM server.	
InstallShield	
< <u>B</u> ack <u>N</u> ext :	> Cancel

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

13. Click **Test server** to verify the connection and then click **Next**. The *Search server* window opens.

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

Check the **Activate Archive Manager Search** to allow search functionality from this server. In the **Search server** field, enter the name, FQDN or IP address of the server where the HSM application feature was installed. You can click **Browse** to locate the server in the domain.

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

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

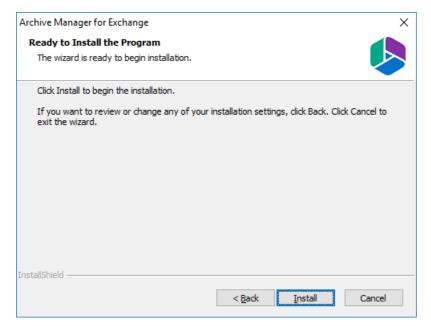
In the **User name** field, specify the superuser name (eg. **democorp\mamadmin**) and **Password**. Enter the password again in the **Confirm password** field.

15. Click Next. The Firewall Settings window opens.

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

Select the **Allow programs to communicate through Windows Firewall** check box. Metalogix Archive Manager for Exchange features will be then able to communicate through the firewall.

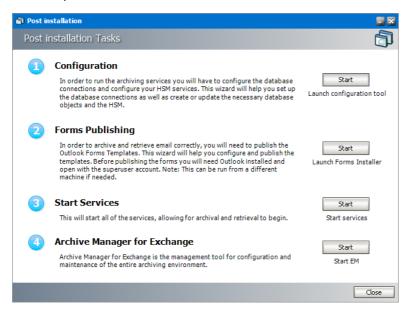
16. Click Next. The Ready to Install the Program window opens.



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

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

18. Select the *Launch Post Installation Tasks* check box and click **Finish**. The *Post installation Tasks* wizard opens.



### Steps to configure the Archive Manager database connection

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

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

5. Select either **Microsoft SQL Server** (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.

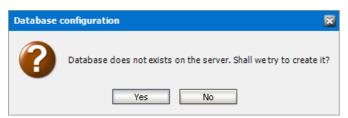
Database configuration	×
Database Connection Wiza	rd 😴
Set up your Microsoft SQL Se	rver connection.
Please enter parameters which will be	used to create a connection to your Microsoft SQL Server.
Server name:	AMXDB
Initial catalog:	MAMEXCH
Schema name:	dbo
Authentication:	Windows Authentication
User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

For Microsoft SQL Server

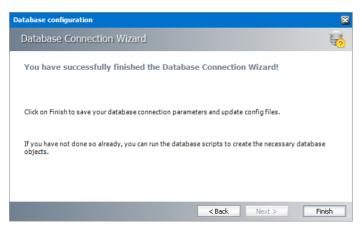
- a. Server name name of the SQL server (eg. AMXDB)
- b. **Initial catalog** name of the HSM database (e.g. **MAMEXCH** which is the default name of the Archive Manager for Exchange database)
- c. Schema name name of the SQL Schema (e.g. dbo)
- d. Authentication authentication type used for the database.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

For Oracle

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



7. If the database connection is setup successfully, the confirmation window opens.



8. Click Finish to close the Database Connection wizard.

### Steps to install the Archive Manager database

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

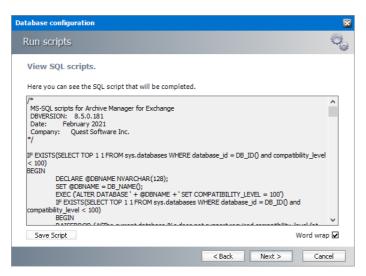
Database configuration	×
Run scripts	
Select scripts to run.	
Please select SQL scripts you want to run.	
Select All	
Unselect All	
🗹 阈 03_exchangeProcedures.sql	
🗹 阈 04_exchangeStandardValues.sql	
🔽 阈 05_exchangeUpdates.sql	
🗹 或 08_ExchangePostProcessingProcedures.	
< >>	
The following page will let you specify the user under which to run database scripts.	
<back next=""> Cancel</back>	

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

Database configuration		×	
Run scripts		Ø.	
Specify the user under w	hich to run database scripts.		
Please specify user under which modify tables and procedures in	to run database scripts. The user must be allowed to create or the database.		
Authentication:	Windows Authentication		
Database user:			
Password:			
☑ I want to see the SQL script before it is run (for advanced users)			
	< Back Next > Ca	ncel	

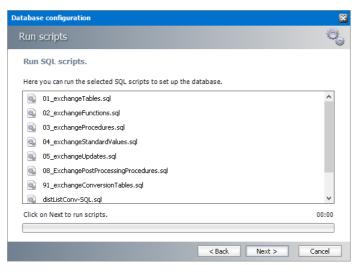
Enter the information as described below:

- 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.
- 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).

😤 Configuration			<b>.</b>
Configure Exch	ange Archive		Database
ArchiveWeb	😼 Database conn	ection	
audiking	Provider: Server name:	Microsoft SQL Server AMXDB	
可 нем	Initial catalog: Schema name:	MAMEXCH	
可 Files Archive	User name:	(Windows Authentication)	
Jusers	Scripts		Configure
Exchange Archive	Database version: Scripts version:	8.5.0.187 8.5.0.187	
🕡 Search	Your database		
post Processing			Run scripts
$\int$			

7. Close the *Configuration* wizard.

### Steps to configure the Auditing database

- 1. Open the *Configuration* wizard if it is not already open.
- 2. From the feature panel on the left, click **Auditing** and then select the **Database** tab.
- 3. Click **Configure**. The *Database Connection Wizard* opens.
- 4. Select either **Microsoft SQL Server** or **Oracle** and click **Next**. The database connection information window opens for the selected database.

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

#### For SQL Server

a. Server name - name of the SQL server (eg. AMXDB)

- b. **Initial catalog** name of the HSM database (e.g. **MAMAUDIT** which is the default name of the Archive Manager for Exchange database)
- c. Schema name name of the SQL schema (e.g. dbo)
- 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**

- e. Oracle net name net service name that describes the network address of the database server in your tnsnames.ora file (eg. AMXDB)
- f. **Schema** name of the Auditing schema (e.g. **MAMAUDIT** which is the default name of the Archive Manager for Exchange database)
- g. User name database login user name
- h. Password password of the database user
- 5. Click Next and then click Yes on the confirmation dialog that opens.
- 6. If the database connection is setup successfully, the configuration confirmation window opens.
- 7. Click **Finish** to close the *Database Connection* wizard.

### Steps to install the Auditing database

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

- 7. Click **Next**. If you chose to view the SQL scripts then the View SQL scripts window opens. If you chose to view the Oracle scripts then the View Oracle scripts window opens
- 8. Click **Save Script** to save the script as a script file to a folder. Check the **Word wrap** check box to display long lines as multiple lines of text.
- 9. Click **Next**. The *Run SQL* scripts window reopens with the scripts you have chosen to run.
- 10. Click **Next**. When the status changes to *Scripts were run successfully*, click **Finish** to close the script installer. The *Scripts* section of the *Configuration* wizard displays the status and version of the scripts.

😤 Configuration				
Configure Audi	ting		Database	Connection Logtargets
Auditing	🚳 Database conn			
Jusers	Provider: Server name:	Microsoft SQL Server AMXDB		
archive	Initial catalog: Schema name:	MAMAUDIT dbo		
	User name:	(Windows Authentication)		Configure
	Scripts			Connigate
	Database version:	8.5.0.27		
1	Scripts version:	8.5.0.27 is up to date.		
$\int \int \int$				Run scripts
P				

11. Close the *Configuration* wizard.

### Steps to configure the User database

- 1. Open the *Configuration* wizard if it is not already open.
- 2. From the feature panel on the left, click **Users** and then select the **Database** tab.
- 3. Click **Configure**. The *Database Connection Wizard* opens.
- 4. Select either **Microsoft SQL Server** or **Oracle** and click **Next**. The database connection information window opens for the selected database.

Database configuration		×
Database Connection Wiza	rd	2
Set up your Microsoft SQL Se	rver connection.	
Please enter parameters which will be	used to create a connection to your Micro	osoft SQL Server.
Server name:	AMXDB	
Initial catalog:	MAMUSER	
Schema name:	dbo	
Authentication:	Windows Authentication 🔹	
User name:		
Password:		
	< Back Ne	ext > Cancel

#### **For SQL Server**

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

#### **For Oracle**

- a. Oracle net name net service name that describes the network address of the database server in your tnsnames.ora file (eg. AMXDB)
- b. **Schema** name of the Auditing schema (e.g. **MAMUSER** which is the default name of the Archive Manager for Exchange database)
- c. User name database login user name
- d. Password password of the database user
- 5. Click **Next** and then click **Yes** on the confirmation dialog that opens.
- 6. If the database connection is setup successfully, the configuration confirmation window opens.
- 7. Click Finish to close the Database Connection wizard.

### Steps to install the User database

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

😤 Configuration			
Configure User	5		Database SMTP Configuration
auditing	🤴 Database conn	ection	
🕡 Users 🕨 🕨	Provider: Server name:	Microsoft SQL Server	
T Exchange Archive	Initial catalog: Schema name:	MAMUSER dbo	
	User name:	(Windows Authentication)	Configure
<u>a</u> .	Database version: Scripts version:	8.5.0.43 8.5.0.43 is up to date.	
52	L		Run scripts

10. Close the *Configuration* wizard.

### Steps to start the Archive Manager for Exchange services

- 1. If the Post installation Tasks wizard is not already open, you can open the the Post installation Tasks wizard from C:\Program Files (x86) \Metalogix\MAM4Exchange\Tools\LaunchTools\LaunchTools.exe.
- Click Start next to step 3 to start the services. You can also start services with the batch file available at <Installation folder> > Metalogix > MAM4Exchange > Tools > Start.bat.
  - NOTE: To stop the services at any time you can use the batch file available at <Installation folder>> Metalogix > MAM4Exchange > Tools > Stop.bat.

### Steps to configure and verify the Archive Server

Unless you manually change the role, every installation of the Archive Manager for Exchange will automatically assign the **Archive Server** role to the installed instance. The **Archive Server** role indicates that this is the primary server and all administration tasks are controlled from this server.

- 1. If the Post installation Tasks wizard is not already open, you can open the the Post installation Tasks wizard from C:\Program Files (x86) \Metalogix\MAM4Exchange\Tools\LaunchTools\LaunchTools.exe.
- Click Start next to step 4 of the the *Post installation Tasks* wizard to open the AMAC. You can also open the Archive Manager for Exchange Administration Center (AMAC) from Start > Archive Manager for Exchange. The AMAC opens.

Archive Manager for Exchange			X
Session View Tools Help			
🖆 🗗 🛍 🗙   D 🗞 🎧   💭	🥬   💐 🔋		
Groups Settings Public Folders Jol	s Retention Locations		
Set filter Clear filter			
Group name Alias	Property	Value	
🎯 🏮 🤭 Server Role: Archive Server	Loaded	FullAccess	Manager

- 3. On the status bar at the bottom of the window, verify that the **Server Role** is set to **Archive Server**.
- 4. The Address Book Setup wizard opens automatically for a new installation. Click Close to exit the wizard. Then close the Address Book Manager window that opens. For a manual installation, Address Book setup can be done at a later step. For more information see <u>Setup</u> the Address Book.
- **i** NOTE: Whenever an Archive Manager for Exchange server is installed, the default role assigned is *Archive Server*. These servers are also identified with a **MultiServerID** and a **LocationID** which are integers that default to 1. Large organizations with more than 3000 mailboxes use more that one Archive server. Since the **MultiServerID** and **LocationID** of each Archive server must be unique, you must manually change the **MultiServerID** and **LocationID** of each extra Archive server by changing the following registry key values. For example, for a second Archive server, set the following registry key values to 2, for a third Archive server set the registry key values to 3, and so on.

```
HKEY_LOCAL_MACHINE > SOFTWARE > Wow6432Node > Metalogix > exchangePAM
> MultiServerID
HKEY_LOCAL_MACHINE > SOFTWARE > Wow6432Node > Metalogix > exchangePAM
> OfflineStorage > LocationID
```

## Install the Retrieve server

In this topic:

- Worksheet for this installation
- Steps to install Archive Manager for Exchange
- Steps to configure the Archive Manager database
- <u>Steps to install the Archive Manager database</u>
- <u>Steps to configure the User database</u>
- Steps to install the User database
- <u>Steps to start the Archive Manager services</u>
- Steps to set the Retrieve Server role
- <u>Steps to verify the Retrieve Server role</u>

### Worksheet for this installation

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

License Key	The license key that you received from Quest. If you don't have a license key, contact your Quest representative.	894K5-3M448-M544E-A594A- 7K8Z7 (Sample only. This key is neither an active nor an expired license key)
Archive manager for Exchange server	The server where the Archive Manager for Exchange will be installed.	AMXSERVER-R
Superuser account	Windows account that is used to install the application and run the Archive Manager for Exchange services.	username: democorp\mamadmin password: ************
Media folder	Full path of the folder where the media files are extracted	C:\Metalogix
Installation folder	Full path of the folder where the application files will be installed	C:\Program Files (x86) \Metalogix
Database Authentication method	Type of database authentication: Integrated Windows Authentication or SQL Authentication	Integrated Windows Authentication
UserLogin	Username if <i>SQL Authentication</i> is selected	dbadmin
Password	Database password if SQL Authentication is selected	*****
Database server	The database server instance name where the databases for Archive Manager for Files will be installed.	AMXDB
HSM server	The server where HSM is installed.	AMXHSM
Search server	The server where the Archive Manager Search is installed.	AMXHSM

# **Steps to install Metalogix Archive Manager for Exchange**

- 1. Login to the server with the credentials of the superuser (eg. **democorp\mamadmin**)
- 2. Run the Metalogix Archive Manager Installation Package to extract the files to a local folder.
- 3. Close the integrated installer wizard which starts automatically.
- 4. Run the Archive Manager Search setup from <Media folder>\C:\Metalogix\Archive Manager Installation Package\Exchange\Archive Manager for Exchange Setup.exe.
- 5. A prerequisite check occurs and missing requirements if any are displayed. Click **Install** to ensure all missing requirements are installed.
- 6. The *Welcome* window of the Archive Manager for Exchange installer opens.

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

7. Click Next. The License Agreement window opens.

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

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

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

9. If you are connected to the internet, select **Online activation** or see <u>License Activation</u> for more options. Click **Next**. When your license is activated, you will see a confirmation message and the license details. Click **Finish** to close the **Activate License Key** dialog.

Archive Manager for Exchange				×
	Destination Location older where setup will install files.			
	Install Archive Manager for Exchar C:\Program Files (x86)\Metalogix	ige to:		<u>C</u> hange
InstallShield		< <u>B</u> ack	<u>N</u> ext >	Cancel

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

Archive Manager for Exchange					
Select Features Select the features setup will install.					
Select the features you want to install, and deselect the Application Server PST Importer Administrative tool Forms Installer Auditing Monitoring service Documentation	t the features you do not want to install. Description Application server contains the core services for an Archive or Retrieve Server. It is not recommended to install the Application services on the Exchange Server. For more information please read the Installation guide.				
354.22 MB of space required on the C drive 107482.56 MB of space available on the C drive InstallShield					
< <u>B</u> ack <u>N</u> ext > Cancel					

Keep on the mandatory features. Uncheck all other check boxes.

- Application Server
- Administrative tool

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

Archive Manager for Exchange	×
Archive Manager site port Information Please define the Archive Manager site port.	
Archive Manager site port number: 80	
Note: port number should be between 1 <-> 65535 InstallShield	Cancel

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

Archive Manager for Exchange	×
Select HSM server Select the HSM server	
Type the name of the HSM server, or select it from the list of servers	
HSM server AMXHSM	Browse
Test HSM server	<u>T</u> est server
The setup successfully established a connection with the HSM server.	
InstallShield	
< <u>B</u> ack <u>N</u> ext	> Cancel

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

13. Click **Test server** to verify the connection and then click **Next**. The *Search server* window opens.

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

Check the **Activate Archive Manager Search** to allow search functionality from this server. In the **Search server** field, enter the name, FQDN or IP address of the server where the HSM application feature was installed. You can click **Browse** to locate the server in the domain.

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

Archive Manager for Exchange		×
Logon Information		
Specify a user account and password.		
Specify the user account to be used by this DOMAIN\Username.	application. User accounts must be in	the format
<u>U</u> ser name:		
democorp\mamadmin		
Password:		
Confirm password:		
•••••		
- Bel - L I		
nstallShield	< Back Next >	Cancel

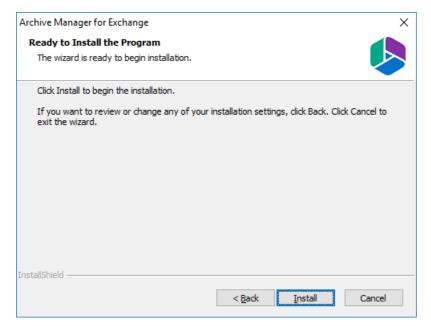
In the **User name** field, specify the superuser name (eg. **democorp\mamadmin**) and **Password**. Enter the password again in the **Confirm password** field.

15. Click Next. The Firewall Settings window opens.

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

Select the **Allow programs to communicate through Windows Firewall** check box. Metalogix Archive Manager for Exchange features will be then able to communicate through the firewall.

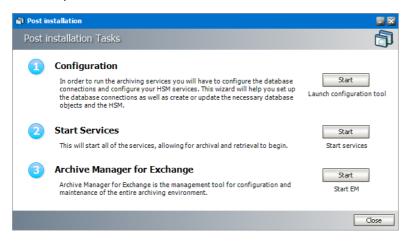
16. Click Next. The Ready to Install the Program window opens.



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

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

18. Select the *Launch Post Installation Tasks* check box and click **Finish**. The *Post installation Tasks* wizard opens.



#### Steps to configure the Archive Manager database

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

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

5. Select either **Microsoft SQL Server** (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 Wiza	rd 😴		
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:	AMXDB		
Initial catalog:	MAMEXCH		
Schema name:	dbo		
Authentication:	Windows Authentication		
User name:			
Password:			
	Caral		
	< Back Next > Cancel		

For Microsoft SQL Server

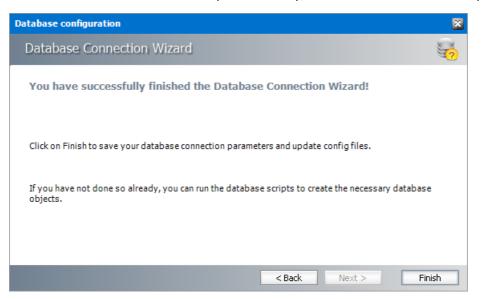
- a. Server name name of the SQL server (eg. AMXDB)
- b. **Initial catalog** name of the HSM database (e.g. **MAMEXCH** which is the default name of the Archive Manager for Exchange database)
- c. Schema name name of the SQL Schema (e.g. dbo)
- d. Authentication authentication type used for the database.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

For Oracle

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

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

7. If the database connection is setup successfully, the confirmation window opens.



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

#### Steps to install the Archive Manager database

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

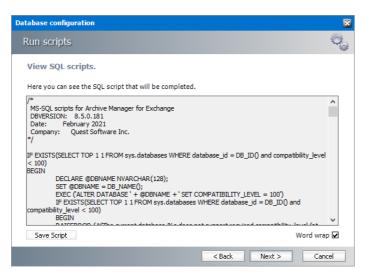
Database configuration	×		
Run scripts	0		
Select scripts to run.			
Please select SQL scripts you want to run.			
O1_exchangeTables.sql     Select All			
Unselect All			
☑ 💽 03_exchangeProcedures.sql			
🗹 🜏 04_exchangeStandardValues.sql			
🗹 🜏 05_exchangeUpdates.sql			
🔽 或 08_ExchangePostProcessingProcedures.			
< >>			
The following page will let you specify the user under which to run database scripts.			
< Back Next > Canc	el		

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

Database configuration		×	
Run scripts		¢¢	
Specify the user under which to run database scripts.			
Please specify user under which modify tables and procedures in	to run database scripts. The user must be allowed to create or the database.		
Authentication:	Windows Authentication		
Database user:			
Password:			
☑ I want to see the SQL script before it is run (for advanced users)			
	< Back Next > Car	ncel	

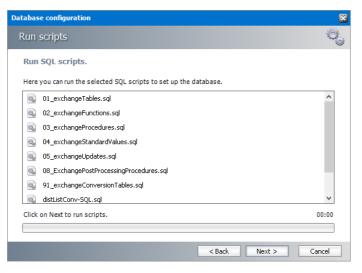
Enter the information as described below:

- a. Authentication authentication type used for the database. Choose either Windows authentication or SQL Server authentication
- a. **User name** database login user name if *SQL Server authentication* is the selected as the authentication mode.
- b. **Password** password of the database user if *SQL Server authentication* is the selected as the authentication mode.
- c. (optional) Check the I want to review the SQL Scripts check box to view the scripts.
- 5. Click **Next**. If you chose to view the SQL scripts then the *View SQL scripts* window opens. If you chose to view the Oracle scripts then the *View Oracle scripts* window opens



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

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



7. Click **Next**. When the status changes to *Scripts were run successfully*, click **Finish** to close the script installer. The *Scripts* section of the *Configuration* wizard displays the status and version of the scripts (the version of the scripts you install may differ from the version shown in the image below).

😤 Configuration			
Configure Exch	ange Archive		Database
🛐 Users	Database conn		
Exchange Archive	Provider: Server name:	Microsoft SQL Server	
	Initial catalog: Schema name: User name:	MAMEXCH dbo (Windows Authentication)	
	Scripts		Configure
	Database version: Scripts version:	8.5.0.187 8.5.0.187	
RA	🥝 Your database	is up to date.	
			Run scripts

8. Close the *Configuration* wizard.

#### Steps to configure the User database

- 1. Open the *Configuration* wizard if it is not already open.
- 2. From the feature panel on the left, click **Users** and then select the **Database** tab.
- 3. Click **Configure**. The *Database Connection Wizard* opens.
- 4. Select either **Microsoft SQL Server** or **Oracle** and click **Next**. The database connection information window opens for the selected database.

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

**For SQL Server** 

- a. Server name name of the SQL server (eg. AMXDB)
- b. **Initial catalog** name of the HSM database (e.g. **MAMUSER** which is the default name of the Archive Manager for Exchange database)

- c. Schema name name of the SQL schema (e.g. dbo)
- d. Authentication authentication type used for the database. Choose either Windows authentication or SQL Server authentication
- e. **User name** database login user name if *SQL Server authentication* is the selected as the authentication mode.
- f. **Password** password of the database user if *SQL Server authentication* is the selected as the authentication mode.

#### For Oracle

- a. Oracle net name net service name that describes the network address of the database server in your tnsnames.ora file (eg. AMXDB)
- b. **Schema** name of the Auditing schema (e.g. **MAMUSER** which is the default name of the Archive Manager for Exchange database)
- c. User name database login user name
- d. Password password of the database user
- 5. Click **Next** and then click **Yes** on the confirmation dialog that opens.
- 6. If the database connection is setup successfully, the configuration confirmation window opens.
- 7. Click **Finish** to close the *Database Connection* wizard.

#### Steps to install the User database

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

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

🛠 Configuration				
Configure User	S		Database	SMTP Configuration
Users V Sectionage Archive	Provider: Server name: Initial catalog: Schema name: User name:	ection Microsoft SQL Server AMXDB MAMUSER dbo (Windows Authentication)		
Ŋ	Corpts Scripts Database version: Scripts version: Of Your database	8.5.0.43 8.5.0.43 is up to date.		Configure Run scripts

10. Close the *Configuration* wizard.

#### Steps to start the Archive Manager for Exchange services

- If the Post installation Tasks wizard is not already open, you can open the the Post installation Tasks wizard from C:\Program Files (x86) \Metalogix\MAM4Exchange\Tools\LaunchTools\LaunchTools.exe.
- Click Start next to step 2 to start the services. You can also start services with the batch file available at <Installation folder> > Metalogix > MAM4Exchange > Tools > Start.bat.
  - **NOTE:** To stop the services at any time you can use the batch file available at <Installation folder>>Metalogix>MAM4Exchange > Tools > Stop.bat..

#### Steps to set the Retrieve Server role

Unless you manually change the role, every installation of the Archive Manager for Exchange will automatically assign the **Archive Server** role to the installed instance. You must set the **Retrieve Server** role for this server.

1. If the Post installation Tasks wizard is not already open, you can open the the Post installation Tasks wizard from C:\Program Files (x86) \Metalogix\MAM4Exchange\Tools\LaunchTools\LaunchTools.exe.

- 2. Click **Start** next to step 3 of the the *Post installation Tasks* wizard to open the AMAC. You can also open the AMAC from **Start** > **Archive Manager for Exchange**. The AMAC opens.
- 3. From the **Tools** menu select **Options**. The *Options* window opens.

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

- 4. From the Select the server role drop down list, select Retrieve Server.
- 5. Click **OK** to set the server role and close the window and restart the server.

#### Steps to verify the Retrieve Server role

- 1. Login to the server with the credentials of the superuser (eg. democorp\mamadmin)
- 2. Click Start > Archive Manager for Exchange. The AMAC opens.

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

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

# **Setup Address Book and Forms**

In this chapter

- Setup the Address Book
- Publish Archive Manager Forms

# Setup up the Address Book

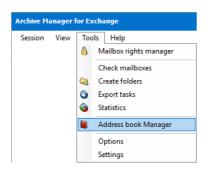
You must import the Microsoft Exchange servers, mailboxes and groups and keep them in synch to facilitate email archiving. With the Address Book Manager, you can import the servers, mailboxes and groups and schedule automatic synchronization jobs to keep the Metalogix Archive Manager for Exchange database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

In this chapter:

- Steps to open the Address Book Manager
- About the Address Book Manager
- Importing Exchange Servers
- Importing Mailboxes
- Importing or Creating Groups
- Synchronizing Address Book Manager

### Steps to open the Address Book Manager

- 1. Log in to the Metalogix Archive Manager for Exchange Administration Center (AMAC).
- 2. From the Tools menu, click Address Book Manager.



or, from the toolbar, click Address Book Manager

Archive Manager for Exchange						
Se	ssio	n	View	Tools	Help	
P	\$	Þ	Ē	$X \mid \square$	99	📄 🥬   🍳 🔋

3. If no Microsoft Exchange servers, mailboxes or groups are available in the Address Book Manager, the *Address Book Setup wizard* opens. Otherwise the Address Book Manager window opens.

### **About the Address Book Manager**

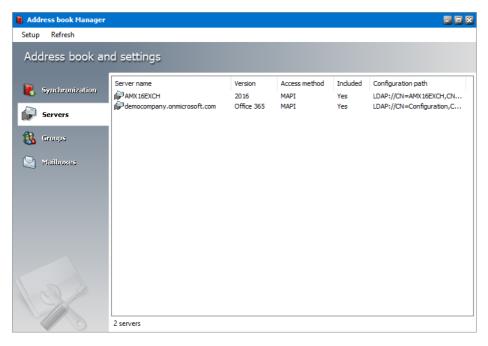
The Address Book Manager window provides two menu options:

**Setup** - starts the *Address Book Setup wizard* that provides a step-by-step guide to add Microsoft Exchange servers, mailboxes and groups. If no Microsoft Exchange servers, mailboxes or groups are available in the Address Book Manager, the *Address Book Setup wizard* opens by default when you open the Address Book Manager.

**Refresh** - reloads information about Microsoft Exchange servers, mailboxes and groups based on the available configuration settings.

The management of Microsoft Exchange servers, mailboxes, groups and synchronization settings are organized by tabs in the Address Book Manager window.

- **Synchronization** for manual or automatic synchronization of mailboxes, groups and permissions with the Active Directory of available servers.
- Servers for adding, removing and managing Microsoft Exchange servers.
- Groups for importing groups, creating user-defined groups and managing group features.
- Mailboxes for importing new mailboxes and managing mailboxes.



### **Importing Exchange Servers**

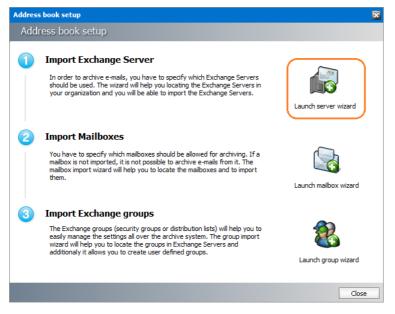
In this topic:

Options for importing Microsoft Exchange servers Steps to add on-premise Microsoft Exchange servers Steps to add online Microsoft Exchange servers Steps to verify the imported Microsoft Exchange servers

### **Options for importing Microsoft Exchange servers**

Microsoft Exchange Servers can be added to the Address Book Manager in one of two ways:

- Option 1 By using the Address Book Setup Wizard.
  - 1. Open the Address Book Manager.
  - 2. From the Setup menu, click Setup Wizard. The Address book setup wizard opens.
  - 3. Click the Launch server wizard to initiate the import process.



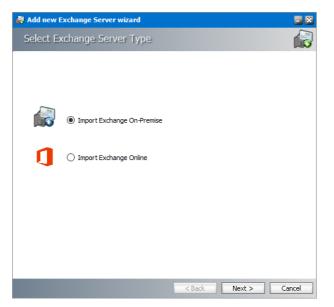
- Option 2 By starting a task from the Servers tab of the Address Book Manager.
  - 1. Open the Address Book Manager.
  - 2. Click the Servers tab.
  - 3. Right-click inside the list view and from the context menu point to **Tasks** and select **Add Server** to initiate the import process.

Address book Manager Setup Refresh					
Address book ar	nd settings				
<b>E</b> Synchronization	Server name	Version	Access In	ncluded Configuration path	
Servers					
🚷 Groups		Tasks Add/Remove		Add Server Update Servers	
Nailboxes		Refresh		Purge Servers	
		Properties			
19K					
	1 servers				

Whichever method you choose, the Select Exchange Server Type window opens.

### **Steps to add on-premise Microsoft Exchange servers**

1. In the Select Exchange Server Type window, select Import Exchange On-Premise.

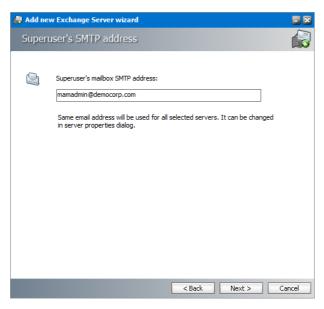


2. Click **Next**. A list of Microsoft Exchange Servers appear that are accessible within your trusted domain.

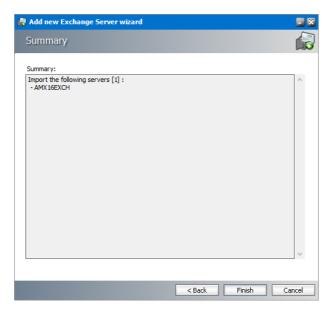
📸 Add new Exchange Server wizard		- ×
Available Exchange Servers		
Servers: 1 new servers / 0 imported servers		
Server Name	Exchange Version	
MXEXCH	Exchange 2016	
Set Exchange Server permissions for Meta	alogix service account	
Set Public Folders permissions for Metalog	-	
	< Back Next > C	ancel

Select the servers that contain the mailboxes and folders you want to archive and then select the check boxes to set the permissions as described below:

- a. Set Exchange server permissions for <*Exchange server online superuser*> grants elevated rights to the Exchange server online *superuser* on each of the selected servers.
- b. Set Public Folder permissions for <*Exchange server online superuser*> grants OWNER permission for the Public Folders to the Exchange serve online *superuser*.
- 3. Click Next. The *Superuser's mailbox SMTP address* window opens. In the **Superuser's mailbox SMTP address** field, enter the email address of the superuser if not already filled in. You can change the email from the server **Properties** window.



4. Click **Next**. The **Summary** window opens that lists the on-premise servers that will be added.



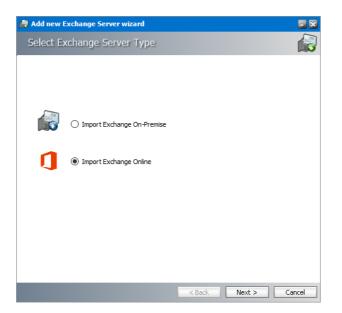
5. Click **Finish** to start the import process. The *Creating objects* window opens. You can click **Back** to select more servers to add or remove some of the selected servers.

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

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

### **Steps to add online Microsoft Exchange servers**

1. In the Select Exchange Server Type window, select Import Exchange Online.



2. Click **Next**. The *Service account for O365 Exchange server import* window opens. Enter the administrator credentials for the Microsoft Exchange online server.

💦 Add new Exchange Server wizard	
Superuser for Exchange server online	
Username:	
administrator@democompany.onmicrosoft.com	]
Password:	
*******	
< Back Next > Ca	ncel

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

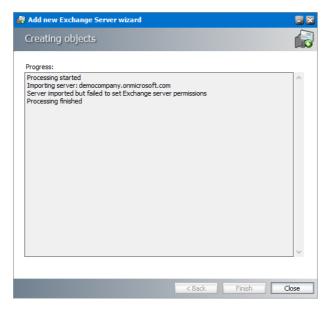
🙀 Add new Exc	change Server wizard		
Available I	Exchange Servers		
Servers: 1 new	servers / 0 imported servers		
Server Name		Exchange Version	
democompa	any.onmicrosoft.com	Office 365	
🗹 Set Exchang	ge Server permissions for admi	nistrator@democompany.onmicrosoft.	.com
Set Public Fo	olders permissions for <mark>l</mark> administ	ator@democompany.onmicrosoft.com	n
		< Back Next >	Cancel

Select the servers that contain the mailboxes and folders you want to archive and then select the check boxes to set the permissions as described below:

- a. Set Exchange server permissions for <*Exchange server online superuser*> grants elevated rights to the Exchange server online *superuser* on each of the selected servers.
- b. Set Public Folder permissions for *<Exchange server online superuser>* grants OWNER permission for the Public folders to the Exchange serve online *superuser*.
- 4. Click **Next**. The *Summary* window opens that lists the online Microsoft Exchange servers that will be added.

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

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



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

# **Steps to verify the imported Microsoft Exchange servers**

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

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

# **Importing Mailboxes**

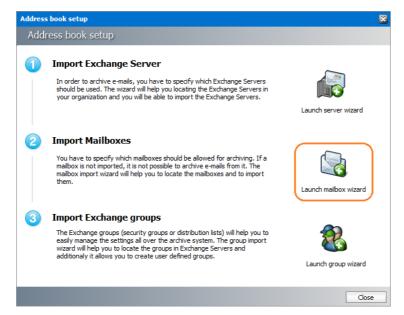
In this topic:

Options for importing mailboxes Steps to import mailboxes from on-premise Microsoft Exchange servers Steps to import mailboxes from online Microsoft Exchange servers Steps to verify the imported mailboxes

# **Options for importing mailboxes**

Microsoft Exchange server mailboxes can be added to the Address Book Manager in one of two ways:

- By using the Address Book Setup Wizard.
  - 1. Open the Address Book Manager.
  - 2. From the Setup menu, click Setup Wizard. The Address book Setup wizard opens.
  - 3. Click the Launch mailbox wizard to initiate the import process.



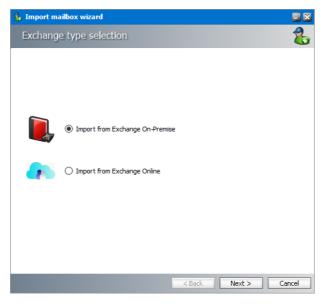
- By using the Mailboxes tab of the Address Book Manager.
  - 1. Open the Address Book Manager.
  - 2. Click the Mailboxes tab.
  - 3. Right-click inside the list view and from the context menu point to **Tasks** and select **Import mailbox wizard** to initiate the import process.

Synchronization	RDN		Display name	Alias	email address	Home ser
🗭 Servers						
🚯 Groups			Tasks 🕨	Import mail	box wizard	
Mailboxes	-		Add/Remove columns	Activate ma	ilboxes	
~		\$	Refresh list	Deactivate r	mailboxes	
		P	Properties	Migrate ma	ilbox	
	L		Permissions	Purge mails	ooxes	
				Synchronize	e mailbox folder permissions	
				Update mai	lboxes	

Whichever method you choose, the Import mailbox wizard window opens.

# Steps to import mailboxes from an on-premise Microsoft Exchange Server

1. In the *Select Exchange Server Type* window, select **Import from Exchange On-Premise**.



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

Import mailbox wiza	rd 📴	×
Mailboxes - searc	ch and select mailboxes to import	6
Look for Name:		
	Search	
	Search	
Display Name	Email Address	
Administrator	spsadmin@domca.meta.test	
🗸 Niki Portman	nikiportman@domca.meta.test	
🗹 Ishna Mohan	ishnamohan@domca.meta.test	
🗹 Nina Tanaka	ninatanaka@domca.meta.test	
Pablo Neruda	pabloneruda@domca.meta.test	
Aman Ali	amanali@domca.meta.test	
Juan Christie	juanchristie@domca.meta.test	
Devika Sharma	devikasharma@domca.meta.test	
Karl Jordan	karljordan@domca.meta.test	
Tim Ashford	timashford@domca.meta.test	
David Webb	davidwebb@domca.meta.test	
		_
	< Back Next > Cancel	_

- 3. Click Search to return the list of all mailboxes across all on-premise servers available to the Address Book Manager. To reduce the list of mailboxes, you can specify a search term in the Look for Name search box. Only the initial letters of the mailbox *Display Name* can be specified, and wildcards are not supported. The search term is case-insensitive. For example, if you enter *ni* as the search term and click Search, the mailboxes that start with the letters *ni* will be returned in the search results list.
- 4. Select one or more mailboxes that you want to import.
  - **NOTE:** Mailboxes that are highlighted indicate that they already exist in the Address Book Manager. The list summary above the list of mailboxes will indicate how many mailboxes that you select are new, and how many already exist. If you select preexisiting mailboxes, they will be updated during the import process..
- 5. Click **Next**. The *Summary* window opens that lists the mailboxes from the on-premise Microsoft Exchange servers that will be imported.

🐍 Import mailbox wizard			
Summary			8
Summary:			
Import the following mailboxes [4] : - Administrator - Niki Portman - Ishna Mohan - Nina Tanaka			
	< Back	Finish	Cancel

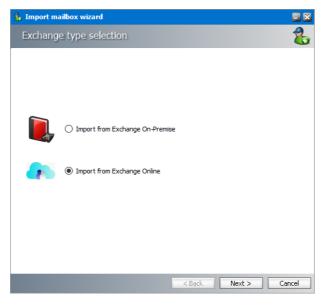
6. Click **Finish** to start the import process. The *Creating Object* window opens. You can click **Back** to select more mailboxes to add or remove some of the selected mailboxes.

• Import mailbox wizard Creating objects				2	3
Progress: Processing started Importing mallox: Administrator Mailbox imported Importing mallox: Niki Portman Mailbox imported Importing mallox: Ishna Mohan Mailbox imported Processing finished					
	< Back	(	Finish	Close	

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

### Steps to import mailboxes from an online Microsoft Exchange Server

1. In the Select Exchange Server Type window, select Import from Exchange Online.



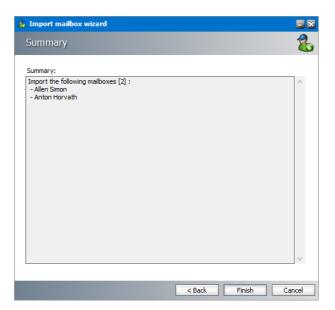
2. Click Next. The Exchange Online window opens. Select the desired Office 365 instance.

🐍 Import mailbox wizard			- ×
Exchange Online			2
Select Office 365 tenants:			-
Server Name			
democompany.onmicrosoft.com			
	< Back	Next >	Cancel

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

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

- 4. Click Search to return the list of all mailboxes across all on-premise servers available to the Address Book Manager. To reduce the list of mailboxes, you can specify a search term in the Look for Name search box. Only the initial letters of the mailbox *Display Name* can be specified, and wildcards are not supported. The search term is case-insensitive. For example, if you enter *A* as the search term and click Search, the mailboxes *that start with the letter A* will be returned in the search results list.
- 5. Select one or more mailboxes that you want to import.
  - **i** NOTE: Mailboxes that are highlighted indicate that they already exist in the Address Book Manager. The list summary above the list of mailboxes will indicate how many mailboxes that you select are new, and how many already exist. If you select preexisiting mailboxes, they will be updated during the import process.
- 6. Click **Next**. The **Summary** window opens that lists the online Microsoft Exchange servers that will be added.



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

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

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

### Steps to verify the imported mailboxes

- 1. Open the Address Book Manager
- 2. Click the Mailboxes tab and verify the imported mailboxes in the list view.

Address book an	nd settings				
	RDN	Display name	Alias	email address	Home server
📕 Synchronization	🔄 spsadmin	Administrator	spsadmin	spsadmin@democompany	AMX 16EXCH
	😫 public_MetalogixS	public_MetalogixSoftware	public_Metalogi	public_MetalogixSoftware6	democomp
F Servers	Dublic_AMX16EXCH	public_AMX16EXCH	public_AMX16E	spsadmin@democompany	AMX16EXCH
	🔍 ninatanaka	Nina Tanaka	ninatanaka	ninatanaka@democompan	AMX16EXCH
🚯 Groups	ikiportman 🔍	Niki Portman	nikiportman	nikiportman@democompan	AMX16EXCH
-	ishnamohan	Ishna Mohan	ishnamohan	ishnamohan@democompan	AMX 16EXCH
Mailboxes	lensimon allensimon	Allen Simon Anton Horvath	allensimon antonhorvath	allensimon@democompan antonhorvath@democompan	democomp

#### NOTES:

Mailboxes with names like *public\_<name-of-Microsoft-Exchange-server>* also appear in the mailboxes list These mailboxes are the public folders from the respective Microsoft Exchange server because Address Book Manager considers a public folder as a profile. These mailboxes are always highlighted in blue \_\_\_\_, so you can distinguish them faster.

Imported mailboxes must be added to a group in Address Book Manager to allow automatic archiving with scheduled jobs. If you do not add mailboxes to a group you can archive them manually. For more information about adding mailboxes to groups see the section "How to add members to a user defined Archive Manager group".

### **Importing or Creating Groups**

Groups allow you to schedule archiving jobs. There must be at least one group (either imported from Active Directory or a user-defined group) if you plan to schedule archiving jobs. User-defined groups are not Active Directory groups.

In this topic:

Options for importing groups

Steps to import groups from on-premise Microsoft Exchange servers

Steps to import groups from online Microsoft Exchange servers

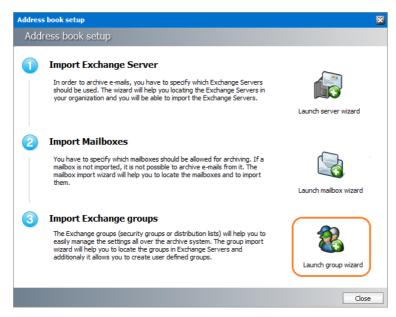
Steps to create user-defined groups

Steps to verify the imported and user-defined groups

# **Options for importing groups**

Microsoft Exchange server groups can be added to the Address Book Manager in one of two ways:

- By using the Address Book Setup Wizard.
  - 1. Open the Address Book Manager.
  - 2. From the Setup menu, click Setup Wizard. The Address book Setup wizard opens.
  - 3. Click the Launch group wizard to initiate the import process.



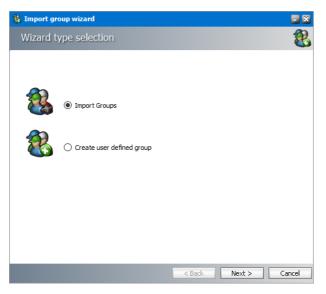
- By using the Groups tab of the Address Book Manager.
  - 1. Open the Address Book Manager.
  - 2. Click the Groups tab.
  - 3. Right-click inside the list view and from the context menu point to **Tasks** and select **Add** group wizard to initiate the import process.

Synchronization   Servers   Servers   Tasks   Add group wizard   Add/Remove columns   Purge group     Refresh   Properties	<sup>Refresh</sup> ess book and	d settings				
Tasks     Add group wizard       Mailboxes     Add/Remove columns       Purge group       Refresh	nchronization	RDN	Display name	Alias	email address	Gro
Mailboxes     Add/Remove columns     Purge group       Image: Refresh     Refresh			Tasks	Add gro	pup wizard	
	ailboxes		Refresh			

Whichever method you choose, the Import group wizard window opens.

# Steps to import groups from an on-premise Microsoft Exchange Server

1. In the Import group wizard window, select Import Groups.



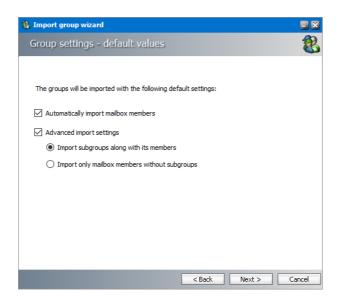
2. Click Next. The *Exchange type selection* window opens. Select Import form Exchange On-Premise.

🍓 Import gr	oup wizard			
Exchang	e type selection			2
	Import from Exchange On-Premis	e		
	O Import from Exchange Online			
		< Back	Next >	Cancel

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

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

- 4. Click Search to return the list of all groups across all on-premise servers available to the Address Book Manager. To reduce the list of groups, you can specify a search term in the Look for Name search box. Only the initial letters of the groups Display Name can be specified, and wildcards are not supported. The search term is case-insensitive. For example, if you enter D as the search term and click Search, the groups that start wit the letter D will be returned in the search results list.
- 5. Select one or more groups that you want to import.
  - **i** NOTE: Groups that are highlighted indicate that they already exist in the Address Book Manager. The list summary above the list of groups will indicate how many groups that you select are new, and how many already exist. If you select pre-exisitng groups, all new mailboxes will also be imported.
- 6. Click **Next**. The *Group settings default values* window opens.



- 7. Specify the settings which will be applied when the groups are imported now or synchronized in future with the Address Book Manager automatically or manually. The settings are described below:
  - a. Automatically import mailbox members check this box to import all Active Directory accounts with a mailbox that are members of this group.
  - b. Advanced import settings check this box if you intend to import subgroups and subgroup mailbox members. You can activate this setting only if you select the Automatically import mailbox members setting.
  - c. **Import subgroups along with members** check this box to import existing subgroups of selected groups including its member mailboxes. This is the default setting.
  - d. **Import only mailbox members without subgroups** check this box to import only member mailboxes from subgroups. These mailboxes will be added to mailboxes in the parent group in the Address Book Manager.
- 8. Click **Next**. The *Summary* window opens that lists the groups that will be added.

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

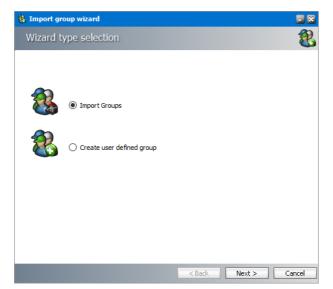
9. Click Finish to start the import process. The Creating Object window opens.

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

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

# Steps to import groups from an online Microsoft Exchange Server

1. In the Import group wizard window, select Import Groups.



2. Click **Next**. In the *Exchange Type selection* window, select **Import from Exchange Online**.

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

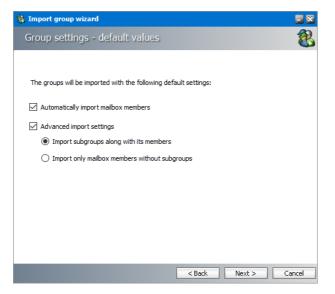
3. Click **Next**. The *Exchange Online* window opens. Select the desired online Microsoft Exchange server.

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

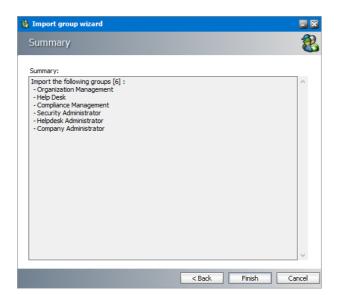
4. Click **Next**. The *Groups - search and select groups to import* window opens.

Import group wizard		- 2
Groups - search and select groups	to import	2
Look for Name:		
		Search
Groups: 41 new groups / 0 imported groups		
Display Name	Security group	^
Organization Management	True	
Recipient Management	True	
View-Only Organization Management	True	
✓ Help Desk	True	
Records Management	True	
Records Management     Discovery Management	True True	
Discovery Management	True	
Discovery Management Hygiene Management	True	
Discovery Management     Hygiene Management     Compliance Management	True True True True True	
Discovery Management Hygiene Management Compliance Management UM Management	True True True True True	~
Discovery Management     Hygiene Management     Compliance Management     UM Management     UM Management     RIM-MailboxAdminsd94a65c903754f75953aa790	True True True True True	>

- 5. Click Search to return the list of all groups across all online servers available to the Address Book Manager. To reduce the list of groups, you can specify a search term in the Look for Name search box. Only the initial letters of the group Display Name can be specified and wildcards are not supported. The search term is case-insensitive.
  - **NOTE:** Groups that are highlighted indicate that they already exist in the Address Book Manager. The list summary above the list of groups will indicate how many groups that you select are new, and how many already exist. If you select pre-existing groups, all new mailboxes in those groups will also be imported.
- 6. Select the groups that you want to import.
- 7. Click Next. The Group settings default values window opens



- 8. Specify the settings which will be applied when the groups are imported now or synchronized in future with the Address Book Manager automatically or manually. The settings are described below:
  - a. Automatically import mailbox members check this box to import all Active Directory accounts with a mailbox that are members of this group.
  - b. Advanced import settings check this box if you intend to import subgroups and subgroup mailbox members. You can activate this setting only if you select the Automatically import mailbox members setting.
  - c. **Import subgroups along with members** check this box to import existing subgroups of selected groups including its member mailboxes. This is the default setting.
  - d. **Import only mailbox members without subgroups** check this box to import only member mailboxes from subgroups. These mailboxes will be added to mailboxes in the parent group in the Address Book Manager.
- 9. Click Next. The Summary window opens that lists the groups that will be added.



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

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

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

## Steps to create user-defined groups

1. In the Import group wizard window, select **Create user defined group**. Enter a name for the group in the **Group Name** field.

🍓 Import gr	oup	wizard			
Wizard t	ype	selection			2
<b>8</b> <b>3</b>	0	Import Groups			
	۲	Create user defined group			
		Group Name:			
		Demo Group			
			< Back	Next >	Cancel

2. Click **Next**. The *User Defined Group - Add members to group* window opens. By default, the on-premise Microsoft Exchange server is the source for the list of mailboxes and groups that can be added to the user-defined group. To use O365 Exchange servers as a source for mailboxes and groups, select **Exchange Online**.

鶲 Import group wiz	zard				
User Defined	Group - Add mer	nbers to group			28
Look for Name:				Se	earch
Display Name	Email Address			Membe	r Type
		< Back	Nex	t >	Cancel

- 3. Click **Search** to return the list of all mailboxes and groups. To reduce the list of mailboxes and groups, you can specify a search term in the **Look for Name** search box. Only the initial letters of the mailbox or group **Display Name** can be specified and wildcards are not supported. The search term is case-insensitive.
  - **i** NOTE: If the Exchange Online check box is checked, only the online Microsoft Exchange servers will be used as the source. If the Exchange Online check box is unchecked, only on-premise Microsoft Exchange servers will be used as the source. Mailboxes and groups that are highlighted indicate that they already exist in the Address Book Manager. The list summary above the list of groups will indicate how many mailboxes and groups are available.

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

- 4. Select one or more mailboxes and groups that want to add to the user-defined group. If you select one or more groups, all mailboxes in that group will also be add to the user-defined group during the import process.
- 5. Click **Next**. The *Summary* window opens that indicates the user-defined group that will be created.

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

6. Click **Finish** to start the group creation process. The *Creating Object* window opens. You can click **Back** to revise your selection of mailboxes and groups.

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

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

## Steps to verify the imported and user-defined groups

- 1. Open the Address Book Manager
- 2. Click the **Groups** tab and verify that the imported Active Directory and user-defined groups appear in the list view as expected. User-defined groups are highlighted in green

Address book Manager					
Setup Refresh					
Address book an	id settings				
<b>B</b>	RDN	Display name	Alias	email add	Group type
📕 Synchronization	8 Company Administrator	Company Administrator	Company Administrator		auto
	🚯 Compliance Management	Compliance Management	Compliance Management		auto
🗊 Servers	🚳 Demo Group	Demo Group	Demo Group		manual
<b>2</b>	🐉 Domain Admins	Domain Admins	Domain Admins		auto
🛛 👪 Groups	👪 Domain Users	Domain Users	Domain Users		auto
	🐉 Help Desk	Help Desk	Help Desk		auto
🔄 Mailboxes	Helpdesk Administrator	Helpdesk Administrator	Helpdesk Administrator		auto
	Security Administrator	Organization Management Security Administrator	Organization Management Security Administrator		auto
	Security Auministrator	Security Administrator	Security Administrator		auto
A C. I					
1 CSP					
	<				>
	9 groups				

- 3. Select a group and right-click to open the context menu. Click **Properties**. The *Properties* window of the selected group opens.
- 4. Click the **Members** tab and verify that the list of mailboxes were imported as expected.

## Synchronizing Address Book Manager

Synchronization with the Microsoft Exchange servers keeps groups and mailboxes up to date so that emails can be archived without problems. With the Address Book Manager, you can set up automatic synchronization schedules and initiate manual synchronization of various artifacts.

In this topic:

Steps to perform a manual synchronization

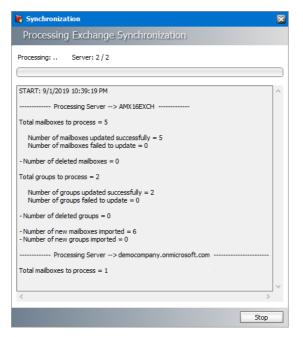
Steps to schedule automatic synchronization

### Steps to perform a manual synchronization

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

🔋 Address book Manager		
Setup Refresh		
Address book an	d settings	
Synchronization	Exchange Synchronization	Exchange Permissions Synchronization
🚳 Groups	Enable Mailbox Update     Enable Group Update	Enable Exchange Mailbox permission sync     Enable Mailbox Folder permission sync     Enable Public Folder permission sync
	Sync Now Schedule	Sync Now Schedule
	Select servers:	
	Server Name MX16EXCH democompany.onmicrosoft.com	
		Apply

- 3. Select the Microsoft Exchange mailboxes, groups and permissions that you want to synchronize.
- 4. In the **Select servers** box, select the Microsoft Exchange servers with which you want to synchronize the mailboxes, groups and permissions.
- 5. Click Apply to confirm the settings.
- 6. Click **Sync Now** in the *Microsoft Exchange Synchronization* box to manually initiate the synchronization of the mailboxes and groups with the selected Microsoft Exchange servers.



- 7. Click Stop to halt the synchronization process before it completes. When the process completes, click the Close button that opens. You can find the results of the synchronization process in a log file located at C:\Program Files (x86) \Metalogix\MAM4Exchange\Log\Synchronization\_<timestamp>.log
- 8. Click **Sync Now** in the *Microsoft Exchange Permissions Synchronization* box to manually initiate the synchronization of the mailboxes and groups with the selected Microsoft Exchange servers.

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

9. Click Stop to halt the synchronization process before it completes. When the process completes, click the Close button that opens. You can find the results of the synchronization process in a log file located at C:\Program Files (x86) \Metalogix\MAM4Exchange\Log\Synchronization <timestamp>.log

## Steps to schedule automatic synchronization

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

🔋 Address book Manager		
Setup Refresh		
Address book an	d settings	
퇺 Synchronization	Exchange Synchronization	Exchange Permissions Synchronization
💭 Servers	Enable Mailbox Update	Enable Exchange Mailbox permission sync
🚷 Groups	Enable Group Update	Enable Mailbox Folder permission sync
🔄 Mailboxes		Enable Public Folder permission sync
	Sync Now Schedule	Sync Now Schedule
	Select servers:	
	Server Name	
	AMX16EXCH democompany.onmicrosoft.com	
100		
		Appiy

- 3. Select the Microsoft Exchange mailboxes, groups and permissions that you want to synchronize.
- 4. In the **Select servers** box, select the Microsoft Exchange servers with which you want to synchronize the mailboxes, groups and permissions.
- 5. Click **Schedule** in the *Microsoft Exchange Synchronization* box. The *Microsoft Exchange Synchronization Scheduler* dialog opens.

🔀 Exchange 🤉	Бупс	:hı	го	ni	zat	io	n s	scl	he	du	ıle	er								l	۵	2
Scheduling																						_
autor	nati	e.	sy	119	sio	01	<u>iv</u>	i i	10	11-2	e	i e	dı	ile	-							
Use sched	luled	s	yn	ch	ron	iza	tio	n														
	0				6	j				1	2					18						
Monday						Γ				Τ	Τ	Τ	Γ	Γ								
Tuesday																						
Wednesday										Ι	Ι	I			Ĺ							
Thursday																						
Friday																						
Saturday																						
Sunday																						
Please mark t synchronizati									Jу	pla	an	w	hei	n t	he	•						
													OK	:				C	Tar	nce	:	

- 6. Select **Use scheduled synchronization** to activate the synchronization calendar. Each row corresponds to a *day of the week*. Each column corresponds to an *hour of the day* (24-hour clock).
- 7. To set up a schedule using the synchronization calendar, click the cell that corresponds to the day of the week and the hour of day when you want the scheduler to initiate a synchronization job. For example, in the figure above, the synchronization schedule is set to start at 18:00 hrs (6 pm) every weekday. The time zone of the computer where the application is running will be used to determine the time.
  - **i NOTE:** If you select consecutive cells in a single row, synchronization will start automatically every hour on the hour. It will consume unnecessary processing time and is not recommended.
- 8. Click **OK** to save the schedule or **Cancel** to discard the setup.
- 9. You can find the results of the scheduled synchronization process in a log file located at C: \Program Files (x86) \Metalogix\MAM4Exchange\Log\Synchronization <timestamp>.log

# **Publish Archive Manager Forms**

Archive Manager Forms are a set of custom Outlook forms that are used to display and work with archived emails. You can choose to publish these custom forms to the *Organizational Forms Library* of your on-premise Exchange Server, or publish these forms to the *Personal Forms Library* of each user whether they use an on-premise Exchange Server or the online Exchange server (O365).

This topic describes the steps to use the **Forms Installer** to publish the Archive Manager Forms directly to the *Organizational Forms Library* of your on-premise Exchange server, or prepare the the Archive Manager Forms for publishing to the *Personal Forms Library* of each on-premise or O365 user registered in the domain active directory using the Group Policy Object (GPO).

- Publish Forms to Organizational Forms Library
- Publish Forms to Personal Forms Library

## **Publish Forms to Organizational Forms Library**

In this topic:

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

### Steps to publish forms to the Organization Forms Library

- **NOTE:** It is assumed that the *Organizational Forms Library* exists on the on-premise Exchange Server. For more information see <u>Setup the Organizational Forms Library</u>.
- Log in to the server where Archive Manager for Exchange (designated the Archive server is a distributed deployment) was installed (eg. AMXSERVER-A) with the credentials of the superuser (eg. democorp\mamadmin)
- 2. To open the Outlook Forms Setup wizard do one of the following:
  - If the Post installation Tasks wizard is not already open, you can open the the Post installation Tasks wizard from C:\Program Files (x86)
     \Metalogix\MAM4Exchange\Tools\LaunchTools\LaunchTools.exe and then click
     Start next to step 2 to start the installer.
  - Start the forms installer directly from C:\Program Files (x86) \Metalogix\MAM4Exchange\Tools\Forms\FormsInstaller.exe.

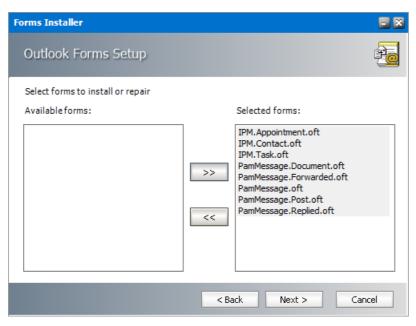
Forms Installer	
Outlook Forms Setup	Po
Select installation type	
Install / repair	
Install or repair Outlook Forms	
O Uninstall	
Uninstall Forms	
< Back Next > Canc	
	81

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

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

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

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



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

5. Click **Next**. The *Outlook Forms Setup - Activate/deactivate Outlook forms events* window opens.

Forms Installer	- ×
Outlook Forms Setup	70
Activate/deactivate Outlook forms events	
Leave the following options checked unless you want the Outlook forms to perform son specific functions. Please consult the installation documentation for more information.	ne
On Open	
✓ On Reply	
On Reply to All	
On Forward	
< Back Next > Cance	I

Keep the default selections on this page unless you want to change the behavior as described below:

a. **On Open** - When checked, this option presents a shortcut that can be clicked to download the archived email but deactivates the ability to use the *Previous Item* and *Next Item* functionality in Outlook because archived emails are offline copies and are not aware of previous or next emails. When unchecked, the archived email cannot be downloaded or viewed.

- b. **On Reply** When checked, the content of the email is included in the reply to the sender of the original email. When unchecked, the shortcut to the archived email is included in the reply message and can be accessed only by members of the Exchange server.
- c. **On Reply to All** When checked, the content of the email is included in the reply to recipients of the original email. When unchecked, the shortcut to the archived email is included in the reply message and can be accessed only by members of the Exchange server.
- d. **On Forward** When checked, the content of the email is forwarded to the new recipient(s) of the original email. When unchecked, the shortcut to the archived email is forwarded to the new recipient and can be accessed only by members of the Exchange server.
- 6. Click Next. The Outlook Forms Setup Retrieve servers identification window opens.

Forms	Installer			
Out	look Forms	Setup		P2
orga for th make Retri	nization. If you l he same server. e sure that this s eve Server is us	have only one Archive Server, If you have a dedicated Retrie	erver name for each location in yo you can provide an alternative n eve Server in the organization, pl y Retrieve Server. The Secondan vailable.	ame ease
Reti	Location ID	Primary Retrieve Server	Secondary Retrieve Server	
J	1	AMXSERVER-R	AMXSERVER-A	
*	1	AMADERVERTR	AMABERVERA	
		< E	ack Next > Ca	ancel

Specify the information as described below:

- a. Location ID Each Archive Manager for Exchange server is bound to a single location identified by the Location Id.
- b. **Primary Retrieve Server** If the deployment topology has just one standalone Archive Manager for Exchange server then enter the NetBIOS name of the standalone server. If the deployment topology has a dedicated Archive Manager for Exchange server with the *Retrieve* role, then specify the NetBIOS name of the Retrieve server (eg. **AMXSERVER-R**).
- c. **Secondary Retrieve Server** For a standalone deployment topology, enter an alternate identifier (eg. IP address) of the same server. For a dedicated *Retrieve* server specify the NetBIOS name of the Archive server.

#### Examples:

Тороlоду	Primary Retrieve Server	Secondary Retrieve Server
Standalone Archive server	NetBIOS name of the Archive server (eg. AMXSERVER)	IP address of the Archive server (eg. 10.20.30.40)
Dedicated Archive and Retrieve servers	NetBIOS name of the <i>Retrieve</i> server (eg. AMXSERVER-R)	NetBIOS name of the <i>Archive</i> server (eg. AMXSERVER-A)
Load-balanced Retrieve servers	NetBIOS name of the load balancer	IP Address of the load balancer

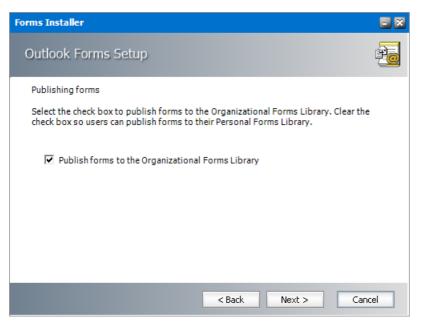
7. Click Next. The Outlook Forms Setup - Retrieval settings window opens.

Forms Installer	
Outlook Forms Setup	
Retrievalsettings	
If you are not sure with these settings, leave this page unchanged or read the documentation.	
<ul> <li>□ Use SSL (https) in server communication</li> <li>✓ Open message as read-only</li> </ul>	
< Back Next > Canc	el

The options are as described below:

- a. Use SSL (https) in server connection Select this option only if the Exchange server communication uses SSL.
- b. **Open message as read-only** When checked, archived emails are opened in read-only mode. When this option is unchecked, users are allowed to modify archived emails but these changes are not updated in the archive. Users with *Archive Manager Outlook Addin* installed can modify archived emails by creating new email versions in the archive even if the **Open message as read-only** check box is selected.

8. Click Next. The Outlook Forms Setup - Publishing forms window opens.



9. Click Next. The Outlook Forms Setup - Summary window opens.

Forms Installer	- X
Outlook Forms Setup	2
Summary:	
Please make sure that Outlook is started. You have to log on to the mailbox which has write permissions in the organizational forms library. Please also make sure that Outlook is not in cached mode. The following forms will be published: (from folder: C:\Program Files (x86)\Metalogix \MAM4Exchange\Tools\Forms\Templates) - IPM.Appointment.oft - IPM.Contact.oft - PamMessage.Document.oft - PamMessage.Document.oft - PamMessage.Forwarded.oft - PamMessage.Post.oft - PamMessage.Replied.oft Entry #1	~
,	
< Back Install Canc	el

10. Verify the settings or click **Back** to revise the settings. Click **Install** to publish the forms. The *Outlook Forms Setup - Install progress* window opens.

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

When the forms are published click Finish.

11. To verify that the forms were published to the Organizational Forms Library in the Exchange server, open an Outlook client account connected to the Exchange server. From the Home tab click New Items > More Items > Choose Form. In the Look In list, click Organizational Forms Library and view the published forms.

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

### Steps to activate Archive Manager forms in mailboxes

After publishing the forms, it is recommended to activate any one Archive Manager form for all users to ensure that the forms are immediately available to the users.

- 1. Open **Outlook** on the Archive Manager server with your administrator or super-user credentials.
- 2. Click the Home tab and navigate to New Items > More Items > Choose Form.
- 3. Choose Organizational Forms Library from the Look in drop down.
- 4. Select the **PamMessage** form that has the archived email icon in the **Description** (to display the icon click **Advanced**)

Choose I	Form					×
<u>L</u> ook in:	Orga	nizational Forms Library		$\sim$	<u>B</u> rowse	
	sage sage sage sage.D sage.F sage.P					
Display <u>n</u>	ame:	PamMessage				Open
<u>F</u> ile name	::					Cancel
Descriptio	on:	Note form				<u>A</u> dvanced < <
Contact:			Version:	3.3000.00	35	
Message	class:	IPM.Note.PamMessage				

- 5. Click and hold the **SHIFT-key** and double-click to load the form. The form opens like a normal email.
- 6. Send this email to all mailboxes you plan to archive. When users receive the email, the new set of custom forms in the *Organizational Forms Library* will be available to the users.

#### NOTE:

a. If there are multiple languages (multiple organizational form libraries), then you need to publish the forms using a language specific Outlook and account – one for each language.

b. To replicate the Archive Manager forms in the Public Information Store, use an Archive Manager form to send an email to your Inbox folder. Then copy or move the email to the Public Folder you wish to archive. The Archive Manager forms are replicated in the Public Information Store too.

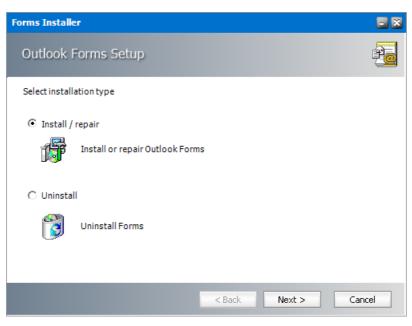
## **Publish Forms to Personal Forms Library**

In this topic:

- <u>Steps to prepare forms for publishing</u>
- Steps to install the Forms Publisher to publish forms
- Steps to use the Forms Publisher to publish forms
- Steps to use the Group Policy Object (GPO) to publish forms

### Steps to prepare forms for publishing

- Log in to the server where Archive Manager for Exchange (designated the Archive server is a distributed deployment) was installed (eg. AMXSERVER-A) with the credentials of the superuser (eg. democorp\mamadmin)
- 2. To open the Outlook Forms Setup wizard do one of the following:
  - If the Post installation Tasks wizard is not already open, you can open the the Post installation Tasks wizard from C:\Program Files (x86)
     \Metalogix\MAM4Exchange\Tools\LaunchTools\LaunchTools.exe and then click
     Start next to step 2 to start the installer.
  - Start the forms installer directly from C:\Program Files (x86) \Metalogix\MAM4Exchange\Tools\Forms\FormsInstaller.exe.



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

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

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

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

Forms Installer		= ×
Outlook Forms Setup		20
Select forms to install or repair Available forms:	Selected forms:	
	IPM.Appointment.oft IPM.Contact.oft IPM.Task.oft PamMessage.Document.oft PamMessage.Forwarded.oft PamMessage.oft PamMessage.Replied.oft	
	<back next=""></back>	Tancel

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

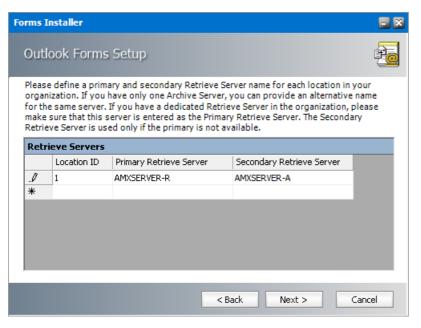
5. Click **Next**. The *Outlook Forms Setup - Activate/deactivate Outlook forms events* window opens.

Forms Installer	×
Outlook Forms Setup	
Activate/deactivate Outlook forms events	
Leave the following options checked unless you want the Outlook forms to perform some specific functions. Please consult the installation documentation for more information.	
✓ On Open	
✓ On Reply	
✓ On Reply to All	
✓ On Forward	
< Back Next > Cancel	

Keep the default selections on this page unless you want to change the behavior as described below:

- a. **On Open** When checked, this option presents a shortcut that can be clicked to download the archived email but deactivates the ability to use the *Previous Item* and *Next Item* functionality in Outlook because archived emails are offline copies and are not aware of previous or next emails. When unchecked, the archived email cannot be downloaded or viewed.
- b. **On Reply** When checked, the content of the email is included in the reply to the sender of the original email. When unchecked, the shortcut to the archived email is included in the reply message and can be accessed only by members of the Exchange server.
- c. **On Reply to All** When checked, the content of the email is included in the reply to recipients of the original email. When unchecked, the shortcut to the archived email is included in the reply message and can be accessed only by members of the Exchange server.
- d. **On Forward** When checked, the content of the email is forwarded to the new recipient(s) of the original email. When unchecked, the shortcut to the archived email is forwarded to the new recipient and can be accessed only by members of the Exchange server.

6. Click Next. The Outlook Forms Setup - Retrieve servers identification window opens.

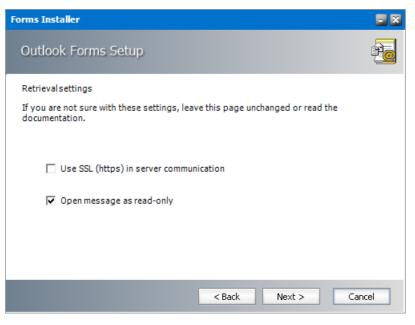


Specify the information as described below:

- a. Location ID Each Archive Manager for Exchange server is bound to a single location identified by the Location Id.
- b. **Primary Retrieve Server** If the deployment topology has just one standalone Archive Manager for Exchange server then enter the NetBIOS name of the standalone server. If the deployment topology has a dedicated Archive Manager for Exchange server with the *Retrieve* role, then specify the NetBIOS name of the *Retrieve* server (eg. **AMXSERVER-R**).
- c. **Secondary Retrieve Server** For a standalone deployment topology, enter the same NetBIOS name or IP address of the standalone Archive server. If the deployment topology has a dedicated Archive Manager for Exchange server with the *Archive* role then specify the NetBIOS name of the *Archive* server.

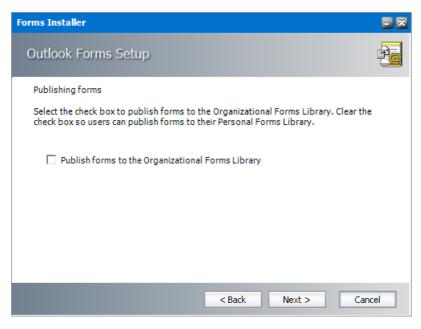
Тороlоду	Primary Retrieve Server	Secondary Retrieve Server
Standalone Archive server	NetBIOS name or IP address of the Archive server (eg. AMXSERVER)	NetBIOS name or IP address of the Archive server (eg. AMXSERVER)
Dedicated Archive and Retrieve servers	NetBIOS name or IP address of the <i>Retrieve</i> server (eg. AMXSERVER-R)	NetBIOS name or IP address of the <i>Archive</i> server (eg. AMXSERVER-A)
Load-balanced Retrieve servers	NetBIOS name or IP address of the load balancer	NetBIOS name or IP Address of the load balancer

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

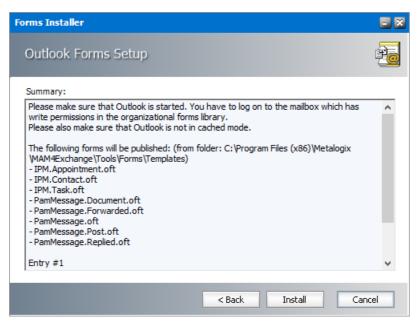


The options are as described below:

- a. Use SSL (https) in server connection Select this option only if the Exchange server communication uses SSL.
- b. **Open message as read-only** When checked, archived emails are opened in read-only mode. When this option is unchecked, users are allowed to modify archived emails but these changes are not updated in the archive. Users with *Archive Manager Outlook Addin* installed can modify archived emails by creating new email versions in the archive even if the **Open message as read-only** check box is selected.
- 8. Click Next. The *Outlook Forms Setup Publishing forms* window opens. Clear the checkbox Publishing forms to the Organizational Forms Library.



9. Click Next. The Outlook Forms Setup - Summary window opens.



10. Click **Install** to prepare the forms for publishing. The *Outlook Forms Setup - Install progress* window opens.

rms Installer	
Outlook Forms Setup	Pe
Install progress: Installation started File copied. Source: 'C:\Program Files (x86)\Metalogix\MAM4Exchange\Tools\Forms\Terr	npla
File copied. Source: 'C:\Program Files (x86)\Metalogix\MAM4Exchange\Tools\Forms\Tem File copied. Source: 'C:\Program Files (x86)\Metalogix\MAM4Exchange\Tools\Forms\Tem	npla npla npla
File copied. Source: 'C:\Program Files (x86)\Metalogix\MAM4Exchange\Tools\Forms\Ten File copied. Source: 'C:\Program Files (x86)\Metalogix\MAM4Exchange\Tools\Forms\Ten Temporary folder removed	
<	~
	,
< Back Finish Car	ncel

11. When the forms are prepared for publishing click **Finish**. When you complete this step, the Archive Manager forms are ready to be published to the *Personal Forms Library*.

### Steps to install the Forms Publisher to publish forms

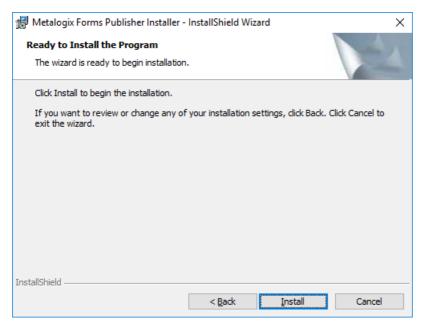
1. Open <Media-folder>\Archive Manager Installation Package\Exchange\Addin and run the Archive Manager Forms Publisher Setup.msi installer.

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

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

滑 Metalog	ix Forms Publisher Installer -	InstallShield Wi	zard	×
	ion Folder kt to install to this folder, or clic	k Change to insta	Il to a different folde	r AA
Þ	Install Metalogix Forms Publis C:\Program Files (x86)\Metal		er\	<u>C</u> hange
InstallShield -		< <u>B</u> ack	Next >	Cancel

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



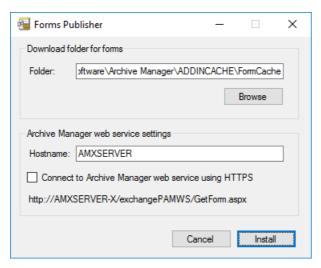
4. Click **Install**. When the installation completes, the *InstallShield Wizard Completed* window opens.

🔀 Metalogix Forms Publisher Ir	nstaller - InstallShield Wizard	×
S	InstallShield Wizard Completed	
	The InstallShield Wizard has successfully installed Metalogix Forms Publisher Installer. Click Finish to exit the wizard.	
	☑ Launch Forms Publisher	
	< <u>B</u> ack <b>Finish</b> Cancel	

If you wish to publish the forms to the Personal Forms Library immediately, select the checkbox **Launch Forms Publisher** and click **Finish.** Then follow the steps in the next section to publish the forms. If you clear the checkbox, you can start the *Form Publisher* form the *Start menu > Metalogix > Form Publisher*.

### Steps to use the Forms Publisher to publish forms

1. If the Forms Publisher is not already opened, start the *Form Publisher* form the *Start menu* > *Metalogix* > *Form Publisher*. The *Forms Publisher* window opens.



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

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

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

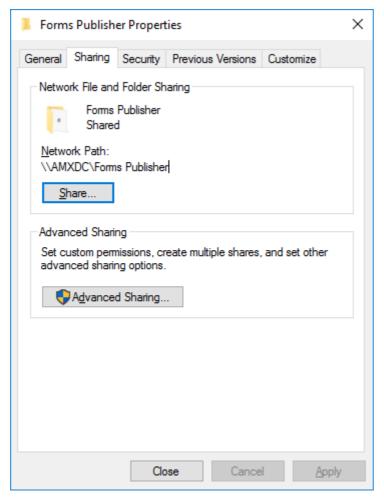
### Steps to use the Group Policy Object (GPO) to publish forms

The steps to set up the GPO has three stages:

- Create a shared folder on the domain controller for the Forms Publisher installer
- Create a registry item to store the web service URL that will be invoked by the Forms Publisher
- Create a GPO to distribute the Forms Publisher Setup to intended users

# Create a shared folder on the domain controller for the Forms Publisher installer

- 1. Log in to your domain controller and open Server Manager.
- 2. Create a shared folder called **Forms Publisher**. Share it with all intended users with the **Read** permission. Note the UNC path of the shared folder

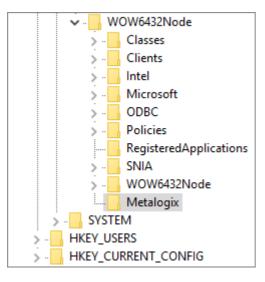


3. Copy and paste the Archive Manager Forms Publisher Setup.msi installer to your shared folder. This file is already in your Archive Manager server at this location: <shared-media-folder>\Archive Manager Installation Package\Exchange\Addin

③ Open	×
← → ∽ ↑ 🖳 \\AMXDC\Forms Publisher	✓ O Search Forms Publisher
Organize 🔻 New folder	III 🔹 🔟 (
Documents Name	Date modified Type Size
🕂 Downloads 👘 Archive Manager Forms Publisher Setup	5/28/2020 10:49 AM Windows Installer 2,519 KB
<ul> <li>Music</li> <li>Pictures</li> <li>Videos</li> <li>Windows (C:)</li> <li>Temporary Stora</li> <li>Network</li> </ul>	
v <	· · · · · · · · · · · · · · · · · · ·
File <u>n</u> ame: Archive Manager Forms Publisher Setup.r	nsi  Vindows Installer packages (*.r <u>O</u> pen Cancel

Create a registry item to store the web service that will be invoked by the Forms Publisher

- CAUTION: The following steps are instructions to modify the registry of the domain controller. Serious problems might occur if you modify the registry incorrectly by using the Registry Editor or by using another method.
- 1. Open the Registry. Expand HKEY\_LOCAL\_MACHINE\SOFTWARE\Wow6432Node and create a new key named Metalogix.



#### Create a GPO to distribute the Forms Publisher Setup to intended users

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

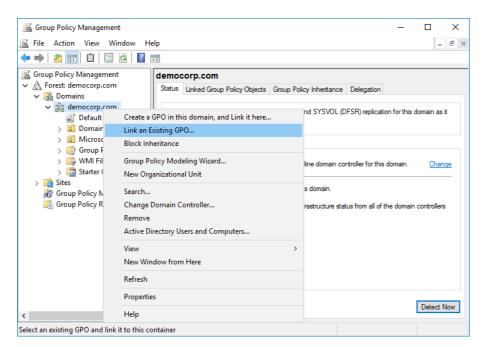
📓 Group Policy Management				– 🗆 ×
<u>K</u> ile <u>A</u> ction <u>V</u> iew <u>W</u> indow <u>H</u>	elp			- 8 ×
🗢 🔿 🞽 📆 🙆 🖬				
<ul> <li>Group Policy Management</li> <li></li></ul>	Group Policy Objects in Contents Delegation	democorp.com		
✓ iii democorp.com	Name	GPO Status	WMI Filter	Modified
Default Domain Policy     Domain Controllers     Garden States     WMI Filters     WMI Filters     Group Policy Modeling     Group Policy Results	Default Domain Policy	Enabled Enabled	None None	10/1/2019 1:32: 9/28/2019 12:1
< >	<			>
	11			

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

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

Enter the information as described below:

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



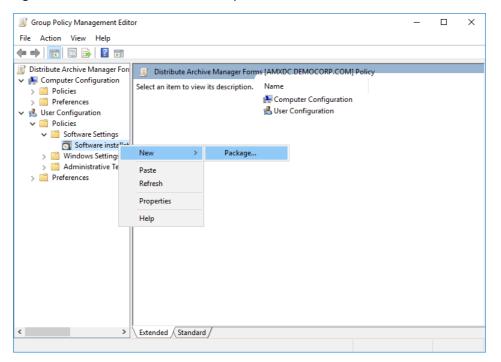
5. Choose the GPO that you created and then click OK.

,
1

6. Right-click the GPO you created and then click **Edit**. The *Group Policy Management Editor* opens.

📓 Group Policy Management					- 0	Х
📓 File Action View Window H	elp				-	Ξ×
🗢 🔿 🙍 🖬 🧔						
Group Policy Management	Group Policy Obj Contents Delegation Name Default Domain Cc Default Domain Pc	ontrollers Policy Dicy Edit GPO Statu Back Up	GPO Status Enabled Enabled Enabled Is Is Is Is Is Is Is Is Is Is Is Is Is	WMI Filter None None	Modfied 10/1/2019 1:32: 9/28/2019 12:1 9/23/2020 2:08	Ow Dor Dor
< >	<					>
~ 2	<u>r</u>					

7. Navigate to User Configuration > Policies > Software Settings > Software Installation. Then right-click Software Installation to open the context menu. Click New and then click Package.



8. Browse to the shared folder you created in a step 2 above, and select the Archive Manager Forms Publisher Setup.msi installer.

🗐 Open					×
	AMXDC	Forms Publisher	~ ē	Search Forms Publisher	Q,
Organize 🔻 New f	older				•
Documents	^ N	ame	Date modified	Туре	Size
Downloads	1	🖁 Archive Manager Forms Publisher Setup.msi	9/25/2020 12:34 PM	/ Windows Installer	2,533 KB
<ul> <li>Music</li> <li>Pictures</li> <li>Videos</li> <li>Windows (C:)</li> <li>Temporary Stora</li> <li>Network</li> </ul>	ŀ				
	v <				>
Fil	le <u>n</u> ame:	Archive Manager Forms Publisher Setup.msi	~	Windows Installer packa	ges (*.r ∨ Cancel

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

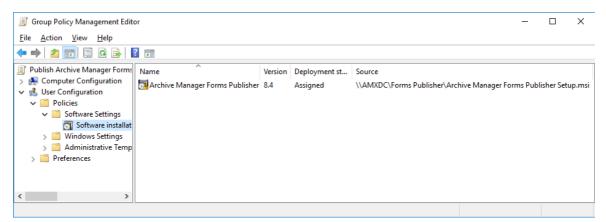
Deploy Software	×			
Select deployment method:				
<u>○ P</u> ublished				
○ <u>A</u> ssigned				
Advanced				
Select this option to configure the Published or Assigned options, and to apply modifications to a package.				
OK Cancel				

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

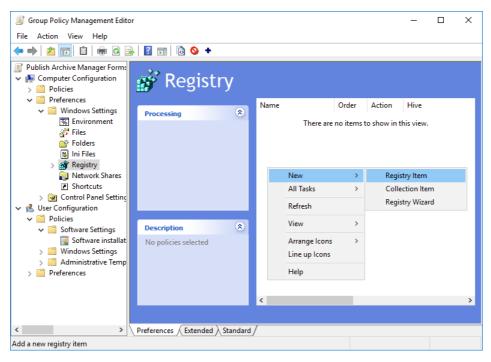
Metalogix Forms Publisher Installer Properties					Х
General Deployment	Upgrades	Categories	Modifications	Security	
Deployment type <u>P</u> ublished A <u>s</u> signed					
Deployment options Auto-install this application Do not display the panel	plication whe	en it falls out o	of the scope of	is control	
Installation user inter	-				
○ <u>B</u> asic ● <u>M</u> aximum					
Ad <u>v</u> anced					
			OK	Cance	el

Set the properties as described below:

- a. From the *Deployment type* section, select the **Assigned** option.
- b. From the Deployment options section, select the **Install this application at logon** options check box.
- 11. Click **OK** to close the *Metalogix Forms Publisher Installer Properties* window, and verify that application appears in the *Group Policy Management Editor*.



12. From the *Group Policy Management Editor* expand **Computer Configuration** > **Preferences** > **Windows Settings** and then click **Registry**.



13. Right-click in the items pane to open the context menu. Then select **New > Registry Item**. The new *Registry Properties* window opens.

New Registry Properties X					
General Comm	non				
Action	n: Create ~				
<u>H</u> ive:	HKEY_LOCAL_MACHINE				
Key Path:	SOFTWARE\WOW6432Node\Metalogix				
Value name					
De <u>f</u> ault DownloadFormsService					
<u>V</u> alue type:	REG_SZ ~				
Va <u>l</u> ue data:	http://AMXSERVER/ExchangePAMWS/GetForm.asp				
	OK Cancel <u>A</u> pply Help				

In the new *Registry Properties* window create a new registry item with the following values:

- a. Action select Create from the drop down.
- b. Hive select HKEY-LOCAL\_MACHINE from the drop down.

- c. Key Path enter SOFTWARE\Wow6432Node\Metalogix
- d. Value name enter DownloadFormsService
- e. Value type select REG\_SZ from the drop down.
- f. Value data enter the address to web service which will download forms in the format http://<Archive-Manager-Server>/ExchangePAMWS/GetForm.aspx
- 14. Click **OK** to save the registry item. Verify that the registry item appears in the registry items list. Then exit the *Group Policy Management Editor* and the *Group Policy Management* tool.
  - **NOTE:** The user policy will not take effect until a fresh logon occurs after a reboot of the user's computer.
- 15. Verify that the GPO publishes the Archive Manager Forms to the *Personal Forms Library* when they log in to their computers.

# **Installation Verification**

When you have completed the installation and configuration as described in this guide, log on to the Archive server (eg. **AMXSERVER-A**) as the superuser and open Outlook. Send a couple of emails, in order to see if you can read them.

### Steps to verify your installation

- 1. Open the AMAC.
- 2. Click the View menu on the toolbar and select the Archive view.
- 3. In the Look for text field type the name of one of your synchronized mailboxes and click Enter.
- 4. After expanding the mailbox structure you will be able to see the list of emails in the rightpane of the AMAC.
- 5. Right-click any email from a mailbox and choose **Archive item** from the context menu.
- 6. If the archiving process ends with the following dialog you have successfully managed to archive your first email.

Processing result			×
1	Processing finished. Number of items: 1 Processed items: 1	OF	<

# Enhancements

Metalogix Archive Manager for Exchange can be extended with *optional* components to enhance its capabilities.

### Steps to install additional components

1. From your installation media folder, run the **MAMInstaller.exe**. The *Welcome* window appears.



2. From the navigation panel on the left, click **SETUPS**. The *Setups* window appears.



- 3. Install one or more optional components. The components are as follows
  - Archive Manager Universal Access Setup allows mobile users, Mac users and Linux users to work with archived emails. For more information see the Universal Access Install Guide.
  - Archive Manager OWA Extensions Setup component that is installed on the Microsoft Exchange Server to provide Outlook Web Access to end-users. For more information see the *Outlook Web Access Guide*.
  - Archive Manager SMTP Setup allows processing of messages from an external email server (O365, Gmail, Exchange, etc.). For more information see the SMTP Guide.
  - Archive Manager PST Gatherer Setup automated extension to the PST importer feature. For more information see the *PST Importer Guide*.
  - Archive Manager Outlook Addin <*version*> Setup gives authorized users the ability to archive and restore emails in Outlook 2013 and above (x86 or x64). For more information see the *Outlook Add-in Installation Guide*.

# Addendum

- <u>Organizational Forms Library troubleshooting</u>
- License Activation

### **Organizational Forms Library troubleshooting**

Sometimes the Organizational Forms Library may not be accessible in Outlook after Archive Manager for exchange installation. This error may occur if there are too many mailboxes with full access permission for the given user and as a result, Public Folders become inaccessible. To address this error, use the following workaround:

- 1. Close Outlook.
- 2. In the Exchange server, open Exchange Management Shell.
- 3. Run the following command where #USERALIAS is alias for given user and #USEREMAIL is the email address of the given user:

Get-Mailbox -ResultSize unlimited -Filter {(RecipientTypeDetails -eq
'UserMailbox') -and (Alias -ne '#USERALIAS')} | Remove-MailboxPermission
-User #USEREMAIL -AccessRights fullaccess -InheritanceType all

- 4. Open Outlook with the profile of the superuser. Now *Organizational Forms Library* should be accessible.
- 5. (Optional) Open Exchange Management Shell and run the following command to give full access permissions to all mailboxes to the superuser

```
Get-Mailbox -ResultSize unlimited -Filter {(RecipientTypeDetails -eq
'UserMailbox') -and (Alias -ne '#USERALIAS')} | Add-MailboxPermission -
User #USEREMAIL -AccessRights fullaccess -InheritanceType all
```

### **License Activation**

#### **Online activation**

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

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

- 2. If you want to activate the license online, select **Online Activation**, and then click **Next**.
  - **NOTE:** If your computer is behind a firewall, click the **Set Proxy** link. The *Proxy Setup* dialog appears.

Proxy server				×
Activate proxy Server name: User name: Password:		Port:	0	
		Set	Close	

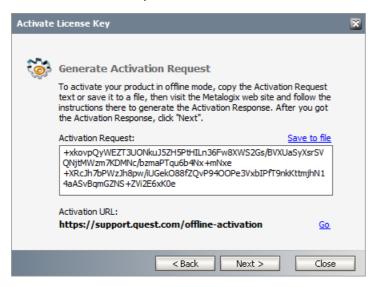
- a. Select Activate Proxy and specify the proxy information as described below:
- b. Server Name enter the name of your proxy server.
- c. **Port** enter the port number of the proxy server.
- d. User name and Password Specify the credentials of the user who is authorized to access the proxy server.
- 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:



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

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

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

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

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

Activate	License Key	×		
9	Enter your Activation Response To activate your product offline mode, paste the Activation Response or load it from file saved on the Activation web page. If you do not have the Activation Response go to previous wizard page and follow the instructions there. Once entered the Activation Response, dick "Next".			
Activation Response: p2Ev +bx3XYOKpoyX55z8y96I9ABE9XNCGLkgVhAx7NuiH2lWIBpBK1AtEilz6 vHpJiW4fxmizEZ/D24FDsZMdA +1kyhlzNaBfYWY/XtkrUwn3YfDdAFMEExYSsUvDwCUvnG1uMOHQsT GddkqT+oKvgiGX4LccThDGPf4/lheOowM9NXfWTw3f				
	< Back Next > 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.

# 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 <u>www.quest.com</u>.

# **Contacting Quest**

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

# **Technical Support Resources**

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

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