

Quest® Archive Manager for Files 8.9

## **Common Upgrade Guide**



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### Legend



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



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

Quest® Archive Manager for Files Common Upgrade Guide

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Version 8.9

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# About this document

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

## Steps to download the install media

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

# Archive Manager for Files

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



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

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

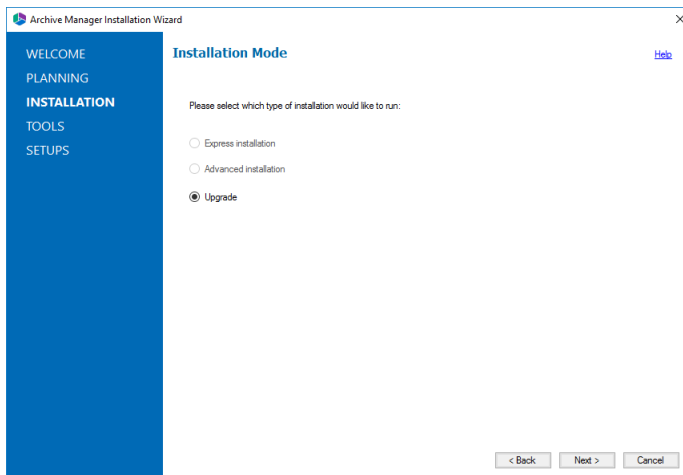
- automatically, with the Archive Manager installer. This method automatically upgrades Archive Manager for Files on the same server where it was previously installed.
- manually, using the *Archive Manager for Files Setup.exe* file. This method manually upgrades Archive Manager for Files on the same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

In this chapter:

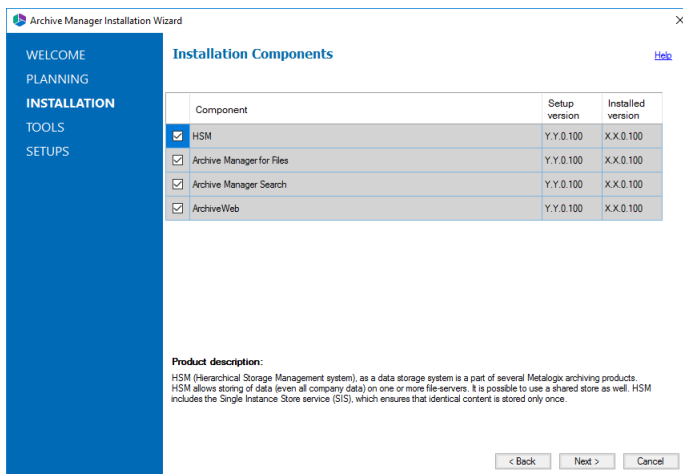
- [Steps to automatically upgrade with the Archive Manager installer](#)
- [Steps to manually upgrade with the Archive Manager for Files installer](#)
- [Steps to manually upgrade the Archive Manager for Files database](#)

## Steps to automatically upgrade with the Archive Manager installer

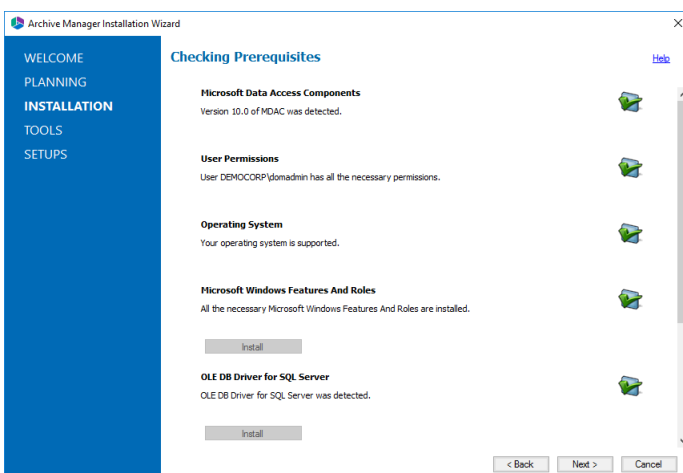
1. Download the latest Archive Manager for Files install media. For instructions see [Steps to download the install media](#).
2. Run the **Quest Archive Manager Installation Package**.
3. The wizard checks whether the Archive Manager for Files installation requires an upgrade. If it does, the **Upgrade**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



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



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



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

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

**Archive Manager Installation Wizard**

WELCOME  
PLANNING  
**INSTALLATION**  
TOOLS  
SETUPS

**Superuser Account** [Help](#)

It is important to specify an account under which Metagoic 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): DOMCA\psadmin

Password:

Re-type password:

< Back   Next >   Cancel

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

**Archive Manager Installation Wizard**

WELCOME  
PLANNING  
**INSTALLATION**  
TOOLS  
SETUPS

**Summary Installation** [Help](#)

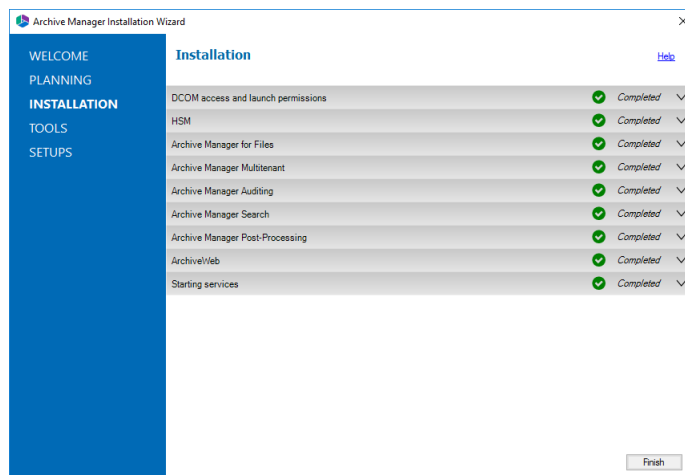
| Component                 | Setup version | Installed version |
|---------------------------|---------------|-------------------|
| HSM                       | Y.Y.0.100     | X.X.0.100         |
| Archive Manager for Files | Y.Y.0.100     | X.X.0.100         |
| Archive Manager Search    | Y.Y.0.100     | X.X.0.100         |
| ArchiveWeb                | Y.Y.0.100     | X.X.0.100         |

☒ Start Archive Manager for Files

☒ I understand that the changes made by the upgrade cannot be undone. The setup updates the existing Archive Manager databases, which takes a certain amount of time, depending on the database size. We always recommend performing a database backup before updating.

< Back   Upgrade >   Cancel

- a. Select the check box **Start Archive Manager for Files** to open the Archive Manager for Files Administration Center (AMAC) when the upgrade completes.
  - b. Select the check box **I understand that...** to confirm that you have acknowledged the upgrade. The setup updates the Archive Manager database. If the check box is not selected, you cannot install the upgrade.
8. Click **Install** to start the upgrade. Click **Back** to return to the previous page or click **Cancel** to exit the upgrade wizard. If you click **Install**, the upgrade process starts. The upgrade progress for each component is displayed and the operation is confirmed.

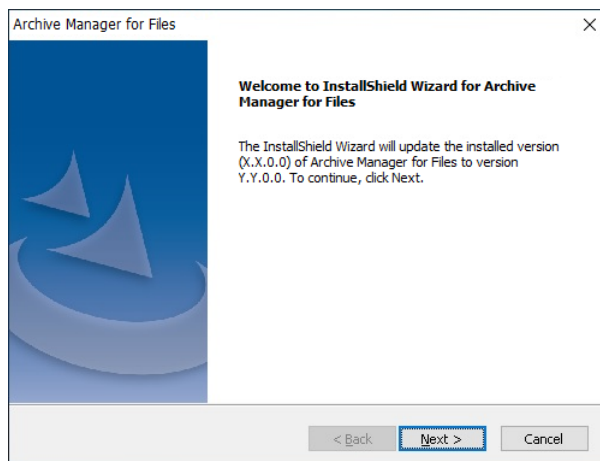


9. Click **Finish** to close the wizard when all the components are upgraded.

## Steps to manually upgrade with the Archive Manager for Files installer

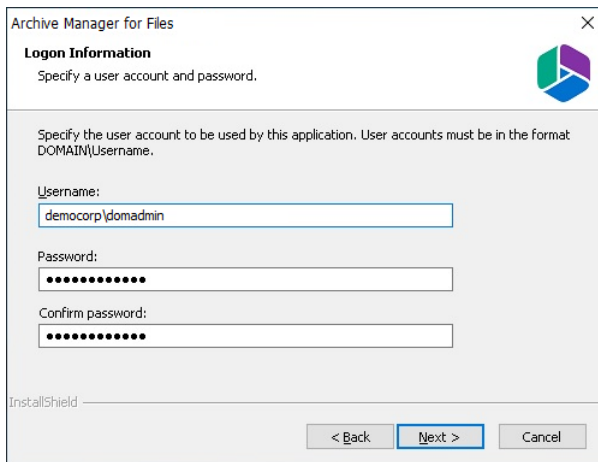
1. Run the Archive Manager Search installer. the default location is `C:\Archive Manager Installation Package\Archive Manager Search\Archive Manager for Files Setup.exe`. The *Welcome* window opens.

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

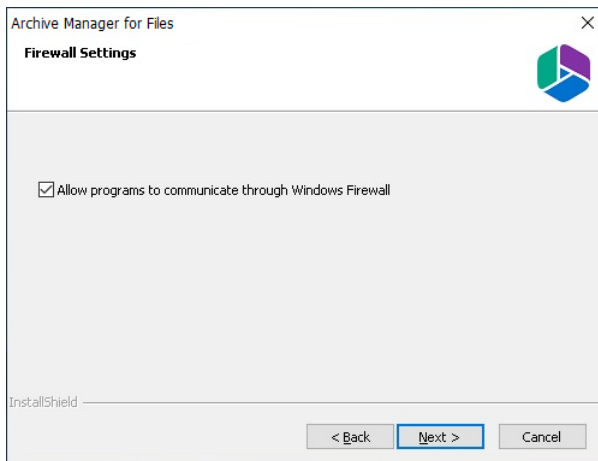


2. Click **Next**. The *Logon Information* window opens.

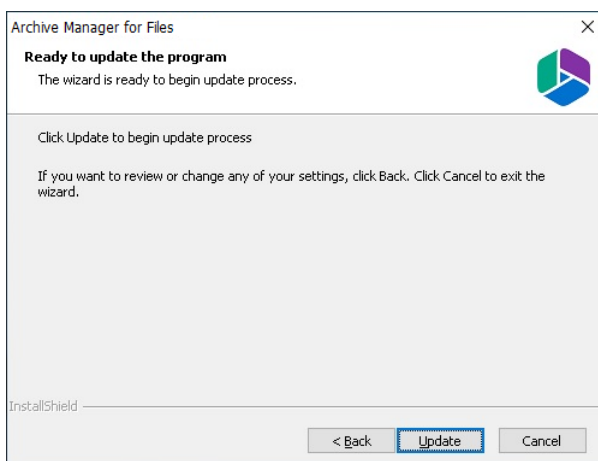




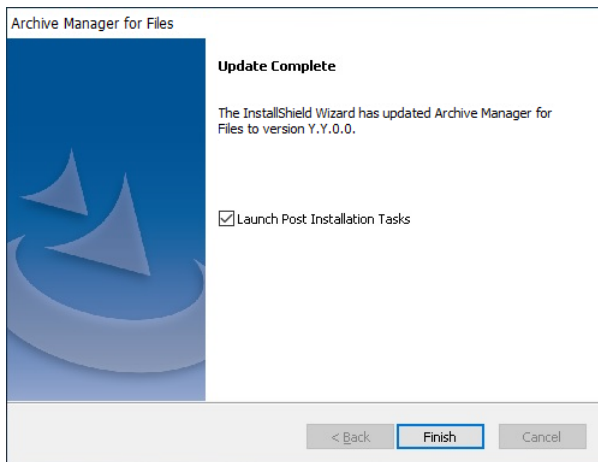
3. Click **Next**. The *Firewall Settings* window opens. Select the check box to allow communications through server firewalls. By default, the **Allow programs to communicate through Windows Firewall** is checked. This will allow critical services to communicate with the Archive Manager for Files service.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



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



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



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

## Steps to manually upgrade the Archive Manager for Files database

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

### For Files Archive

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

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

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

### For Auditing

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

### For Users

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

# HSM

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

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

In this chapter:

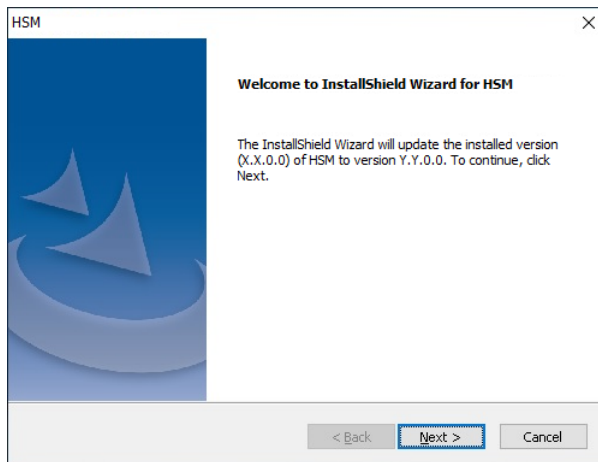
- [Steps to manually upgrade with the HSM installer](#)
- [Steps to manually upgrade the HSM database](#)

## Steps to manually upgrade with the HSM installer

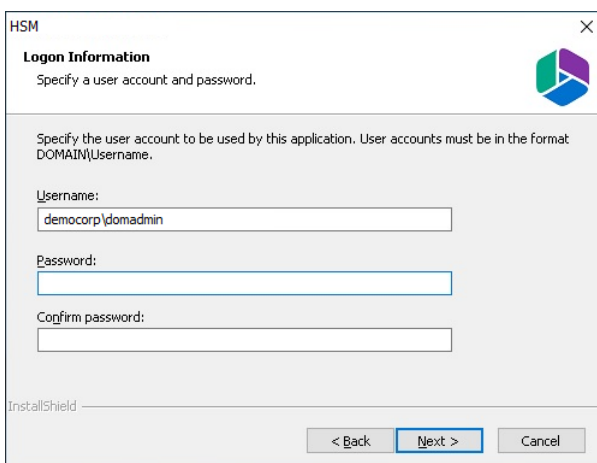
1. Log in to the HSM server with the credentials of the **superuser** (eg. **democorp\domadmin**)
2. Download the installation media. For more information see [Steps to download the install media](#).
3. Run the **Quest Archive Manager Installation Package** to extract the files to a local folder.
4.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

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

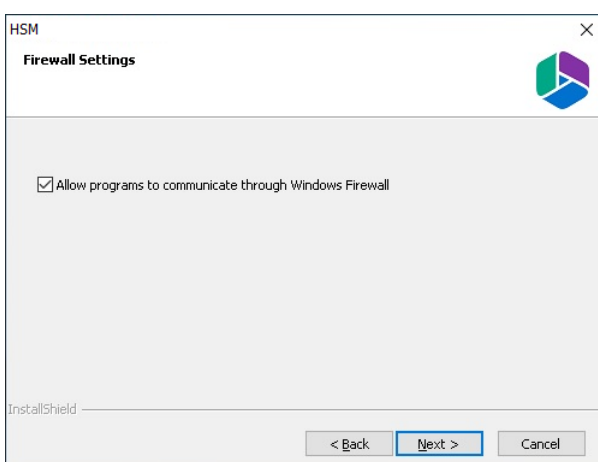
6. The *Welcome* window of the HSM installer opens.



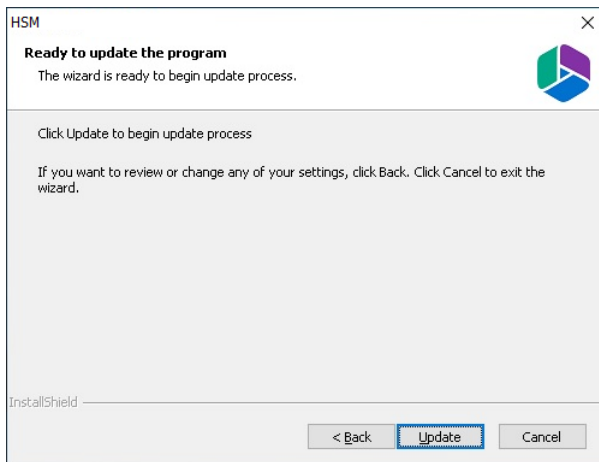
7. Click **Next**. The *Logon Information* window opens.



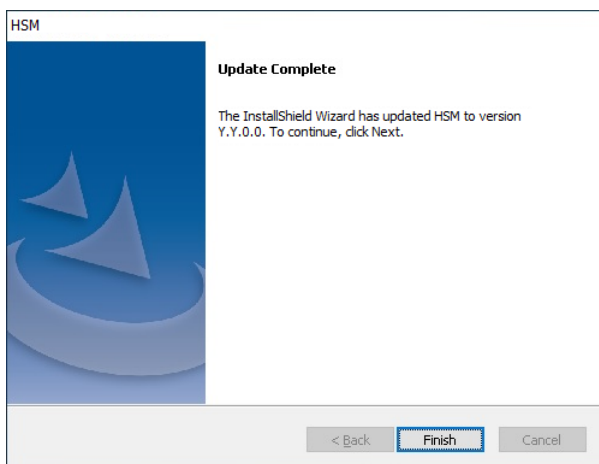
8. Click **Next**. The **Firewall Settings** window opens if the Windows Firewall is active on your computer. By default, the **Allow programs to communicate through Windows Firewall** is checked. This will allow critical services to communicate with the HSM service. If you clear the check box, critical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



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



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



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

## Steps to manually upgrade the HSM database

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

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

- a. **Database user** - database login username if *SQL Server authentication* is the selected as the authentication mode.
  - b. **Password** - password of the database user if *SQL Server authentication* is the selected as the authentication mode.
  - c. (optional) Check the **I want to review the SQL Scripts** check box to view the scripts.
5. Click **Next**. If you chose to view the SQL scripts then the *View SQL scripts* window opens. If you chose to view the Oracle scripts then the *View Oracle scripts* window opens  
  
Click **Save Script** to save the script as a script file to a folder. Check the **Word wrap** check box to display long lines as multiple lines of text.
6. Click **Next**. The *Run SQL scripts* window reopens with the scripts you have chosen to run.
7. Click **Next**. When the status changes to *Scripts were run successfully*, click **Finish** to close the script installer. The *Scripts* section of the **Database** tab displays the status and updated version of the scripts.

# Search

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

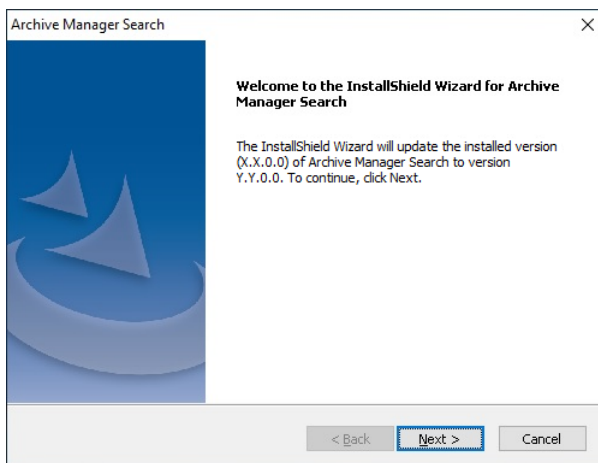
In this chapter:

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

## Steps to manually upgrade with the Search installer

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

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



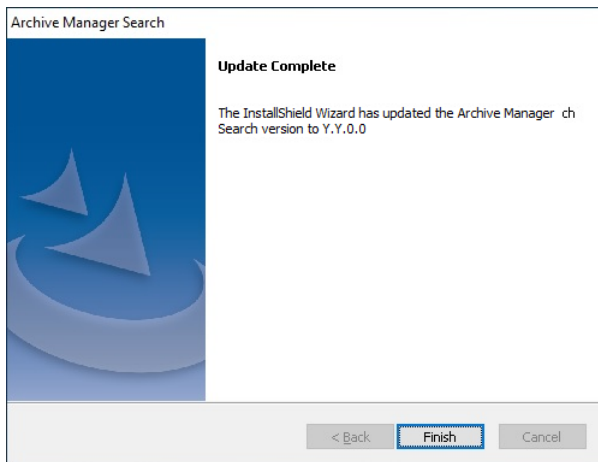
2. Click **Next**. The *Logon Information* window opens.



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

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

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



6. Click **Finish**.

## Steps to manually upgrade the Search database

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

### For Search

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

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

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

### **For Post Processing**

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

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## About Us

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

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## Technical Support Resources

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

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

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