

Metalogix[®] Archive Manager for Files 8.8

Advanced Installation Guide



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Legend

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

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Introduction

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

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

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

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

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

File storage and retrieval process

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

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

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

System Requirements

2

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

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

Hardware

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

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

Operating System

- Windows Server 2016
- Windows Server 2019
- Windows Server 2022
- **i** NOTE: Latest updates and service packs for servers are recommended.

Windows Server Roles

- Web Server (IIS)
 - \circ Web Server / Common HTTP Features / HTTP Redirection
 - \circ Web Server / Performance / Dynamic Content Compression

- \circ Web Server / Security / Basic Authentication
- \circ Web Server / Security / Windows Authentication
- \circ Web Server / Application Development
 - .NET Extensibility 4.5
 - ASP.NET 4.5
- \circ Management Tools / IIS 6 Management Console
- \circ Management Tools / IIS 6 Management Compatibility / IIS 6 Metabase Compatibility
- \circ 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
- .NET Framework 4.8 Features / .NET Framework 4.8
- .NET Framework 4.8 Features / ASP.NET 4.8
- .NET Framework 4.8 Features / WCF Services (all checkboxes under this item)

Redistributable packages

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

.NET 4.8

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

https://dotnet.microsoft.com/en-us/download/dotnet-framework/thank-you/net48-webinstaller

Database Servers and Drivers

- Microsoft SQL Server 2014 to Microsoft SQL Server 2022
 - $\,\circ\,$ Microsoft OLE DB Driver 18 for SQL Server, or newer
- Azure SQL Database
- Oracle 12c to Oracle 19c
 - Oracle client (x86 or x64)

Web Browsers

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

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

File Systems (Sources)

- Windows Server 2016
- Windows Server 2019
- Windows Server 2022
- NTFS including mount-point support
- ReFS
- NetApp Filer (Cluster Mode only)
- EMC VNX

Clients and protocols

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

Additional Information

- Installations on Domain Controllers are not supported.
- For remote archiving on Windows shares, NetApp (Cluster Mode) or VNX, we recommend installing the software on a dedicated server.
- The software installs web applications into the Default Web Site. This could cause conflict with other applications like Microsoft CRM or Microsoft SharePoint. To change the installation website, manual changes are required after the installation. Please contact Technical support in such cases.
- Metalogix Archive Manager for Files is fully supported in a virtualized environment.

• It is possible to install Archive Manager for Files on servers without IIS. However, this prevents the creation of HTML shortcuts and VNX archiving and prevents the use of MS Search as the full-text search engine.

For HSM Server

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

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

Deployment Plan

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



Installation steps:

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

About User Accounts

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

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

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

Considerations for the database user

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

For SQL Server

Windows Authentication

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

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

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

SQL Server Authentication

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

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

For Oracle

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

Advanced Installation

Advanced installation uses the *installation wizard* to install Metalogix Archive Manager for Files and associated features on dedicated servers as described in the <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:

- <u>Prepare the Application Servers</u>
 - o Steps to download the install media
 - o Steps to install the prerequisites
- Install the Application Features
 - o Install HSM and Archive Manager Search
 - o Install Archive Manager for Files

For next steps after you complete the advanced installation, see <u>Configuring Archive Manager for</u> <u>Files</u>.

Prepare the Application Servers

For the Archive Manager Database server (AMFDB)

See the System Requirements and About User Accounts chapters for preparing database servers.

For the HSM and Search server (AMFHSM)

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

For the Archive server (AMFSERVER)

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

Steps to install the prerequisites

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

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

Archive Manager for Files

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

HSM

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

Search

Install-WindowsFeature -Name NET-Framework-Features

ArchiveWeb

Install-WindowsFeature -Name NET-WCF-HTTP-Activation45, Web-Server, Web-Static-Content, Web-Http-Redirect, Web-Stat-Compression, Web-Dyn-Compression, Web-Windows-Auth, Web-Basic-Auth

- **NOTE:** These PowerShell commands are compatible with a Window 2016 operating system. Please refer to the <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 download the install media

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

or

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

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

Install the Application Features

For the HSM and Search server (AMFHSM)

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

Install HSM and Archive Manager Search

For the Archive Manager for Files server (AMFSERVER)

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

Install the Archive Manager for Files server

Install HSM and Archive Manager Search

In this topic:

- <u>Worksheet for this installation</u>
- 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.	AMFHSM
Administrator	Windows account that is used to install the application. This is usually the enterprise administrator.	username: democorp\domadmin password: ************
Media Folder	Full path of the folder where the media files are extracted	C:\Metalogix
Installation folder	Full path of the folder where the application files will be installed	C:\Program Files (x86) \Metalogix
HSM Store folder	Full path of the folder that will contain the archived files.	C:\HSM The local hard drive folder is used as the default media store. Use of other media storage systems are described in the <i>Media Store Administration</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	FilesStore

	drive can be setup as a media store.	
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 SQL <i>Authentication</i>	Integrated Windows Authentication
Username	Username if SQL Authentication 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.	AMFDB

Steps to install HSM and Archive Manager Search

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

- 9. Click **Next**. The *Checking Prerequisites* window opens with database-specific prerequisites. If one or more prerequisites are missing, the **Next** button is deactivated. Click **Install** to install each prerequisite.
- 10. Click **Next**. The *Superuser Account* window opens. Specify the **Superuser name** and **Password**. Enter the password again in the **Retype password** field.

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

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.
- 12. From the *Component* column, select **HSM**.

log Archive Manager Installation Wi	izard			×
	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	нѕм		MSSQL	
	Archive Manager Search		MSSQL	
	Archive Manager Post-Processing		MSSQL	
	Authentication Authentication Username Password	Integrated Wind	ows Authentication	
	Server instance Schema name Server name Database name Authentication Authentication type	dbo AMFDB MAMHSM		
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. Username 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. Username database login username.
- d. Password password of the database user.
- 13. From the *Component* column, select **Archive Manager Search** and verify the database parameter values.
- 14. From the *Component* column, select **Archive Manager Post-Processing** and verify the database parameter values.
- **i** NOTE: When you specify the HSM database parameter values, they are carried over to the database specification for each feature in the list. While the features will be installed on the same server, the database to host the metadata for each feature can be on a different server and the database specifications section for each feature can be customized accordingly.
- 15. Click Next. The Hierarchical Storage Manager Settings window opens.

Archive Manager Installation Wi	Vizard	×
WELCOME	Hierarchical Storage Manager Settings	<u>elp</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 server: AMXHSM	
	Store name: FilesStore Schema name: FilesSchema	
	Please select a location for the HSM folder which is large enough to handle all of the content you wish to archive.	
	Store folder: C:\HSM Browse	
Metalogix	< Back Next > Cance	ł

16. Specify the parameter values as described below:

- a. Store name Name of the media store. The default value is FilesStore.
- b. Schema name name of a schema in the media store. The default value is FilesSchema.
- 17. Click **Next**. The *Please select the type of installation* window opens.

l Archive Manager Installation Wi	fizard	×
WELCOME	Archive Manager Search Settings	Help
PLANNING		
INSTALLATION	Search server: AMFHSM	
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\MAMSearch\Index\Mail Browse	
	For files: C:\Program Files (x86)\Metalogix\MAMSearch\Index\File Browse	
Motologiy		
metalogix	< Back Next >	Cancel

Specify the parameter values as described below:

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

- 18. Click **Next**. The *Firewall Settings* window opens. Select the **Allow installation package to change the firewall settings** check box. Metalogix Archive Manager for Files features will be then able to communicate through the firewall.
- 19. Click **Next**. The Summary Installation window opens. The installation summary displays settings you have specified in previous steps.
- 20. Click Install to start the installation.
- 21. The installer proceeds to install all the features. If a feature installation fails or completes with a warning, expand the row to view and address the problem.
- 22. Click **Finish** to complete the installation step.

Steps to verify the installation

- 1. Open Start > Metalogix > Archive Manager Configuration. The Configuration wizard opens.
- 2. From the navigation panel, click **HSM**. The *Configure HSM* widow opens and the **Database** tab is displayed by default. Verify that the values are as expected.
- 3. Click the **Stores** tab to display information about the media store. Verify that the values in the *Stores* and *Schemas* sections are as expected.

🛠 Configuration	
Configure HSM	Database Stores Advanced Diagnostics Encryption Packer Tasks
ooo HSM ►	Stores Id Name Server Mirror of State 1 FILESSTORE AMFHSM
Post Processing	<
	Schemass Id Name Store Server Force Store Encryption Key Compression Task 1 FilesSchema FILESSTORE AMFHSM yes
ß	< >> Create Selete Selete Sefresh

- 4. From the navigation panel, click **Search**. The *Configure Search* window opens. Verify that the values are as expected.
- 5. From the navigation panel, click **Post Processing**. The *Configure Post Processing* window opens. 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

Install Archive Manager for Files

In this topic:

- <u>Worksheet for this installation</u>
- <u>Steps to install Metalogix Archive Manager for Exchange</u>
- 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 Files server	The server where the Archive Manager for Files will be installed.	AMFSERVER

Installer account	Windows account that is used to install the application. This is usually the enterprise administrator.	username: democorp\domadmin password: ************
Superuser account	Windows account that is used to run the application and run the Archive Manager for Files services.	username: democorp\mamadmin password: *************
Media Folder	Full path of the folder where the media files are extracted	C:\Metalogix
Installation folder	Full path of the folder where the application files will be installed	C:\Program Files (x86) \Metalogix
Database Authentication method	Type of database authentication: <i>Integrated</i> <i>Windows Authentication</i> or <i>SQL</i> <i>Authentication</i>	Integrated Windows Authentication
Username	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.	AMFDB
HSM server	The server where HSM is installed.	AMFHSM
Search server	The server where the Archive Manager Search is installed.	AMFHSM

Steps to install Metalogix Archive Manager for Exchange

1. Log in to the server with the credentials of the enterprise administrator (eg. democorp\domadmin).

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

Select Archive Manager for Files.

- **NOTE: Archive Manager for Exchange** could be installed on the same server. Installation of Archive Manager for Exchange is described in the *Metalogix®* Archive Manager for Exchange Advanced Installation Guide. **ArchiveWeb** is an enhancement. Installation of ArchiveWeb is described in the *Metalogix®* Archive Manager for Files ArchiveWeb Guide.
- 8. Click Next. The Database Engine selection window opens.

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

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

Activate	: License Key	×
Q	Enter license key and select the activation method	
	License key:	
	Activation mode: Online activation (requires online internet connection) Offline activation 	
	Set proxy	
	< 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.

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

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

12. Click Next. The Database Server Connection window opens.

Archive Manager Installation Wi	izard			×
WELCOME	Database Server Connection			<u>Help</u>
PLANNING				
INSTALLATION	Please fill in all values which will be used to create a connection to	your Database Se	erver.	
TOOLS	Component		DB Server	
SETUPS	Archive Manager for Files		MSSQL	
	Archive Manager Multitenant		MSSQL	
	Archive Manager Auditing		MSSQL	
	Authentication	Integrated Windo	ows Authentication	
	Username			
	Password			
	Schema name	dbo		
	Server name	AMFDB		
	Database name	MAMFILE		
	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. Username 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. Username database login username.
- d. Password password of the database user.
- 13. Click **Next**. The *Hierarchical Storage Manager Settings* window opens. In the **HSM server name** field enter the name of the server where the HSM application feature is installed. For example **AMFHSM**.
- 14. Click **Next**. The *Please select the type of installation* window opens. In the **Search server** field enter the name of the server where the Archive Manager Search feature is installed. For example **AMFHSM**.
- 15. Click **Next**. The *Firewall Settings* window opens. Select the **Allow programs to communicate through Windows Firewall** check box. Metalogix Archive Manager for Files features will be then able to communicate through the firewall.
- 16. Click **Next**. The *Summary Installation* window opens. The installation summary displays settings you have specified in previous steps.
 - a. Select **Manage the Organizational Forms Library** if your organization uses this public folder to share email templates. Otherwise, clear the check box.
 - b. Select the check box **Start Metalogix Archive Manager for Files** to open the Archive Manager for Files Administration Center (AMAC) when the installation completes.
- 17. Click Install to start the installation.
- 18. Click Finish to complete the installation step.
- 19. The Archive Manager for Files Administration Center (AMAC) should open automatically if the check box **Start Metalogix Archive Manager for Files** was checked in the *Summary Installation* step of the installation wizard.

Steps to configure and verify the Archive server

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

Home AMFSERVER Manage servers Add server Machine Protocol Protocol Port AMFSERVER TCP ZMFSERVER TCP ZMFSERVER Configure Copy settings	A	rchive Mana	ger for l	Files				×
Manage servers Add server Machine Protocol Port Image server Remove server Image server Configure Image server Copy settings		Home AMP	SERVER					
Machine Protocol Port Image: Add Server Remove Server Configure Copy settings Copy settings		Manage serve	ers					0
Image: Configure Configure Copy settings Copy settings		Machine	Protocol	Port			Add server	
		AMFSERVER	ТСР	7777			Remove server Configure Copy settings	

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

Archive Manager	r for Files	_ = ×
Home AMFSE	ERVER	
*	Files on AMXSERVER	\$ ¢
Archive	₩ - 1 % C: ₩ - 1 % D:	
Scheduler		
Restrictions		
Settings		
Statistics		
		Deathan
	Liedr selection Archive Archive	Restore
	Velsiuis	T
	😻 Archive-Restore 🛛 🕼 Archive view 🛛 🔍 Search & Export	

Manual Installation

6

In this chapter:

- Prepare the Application Servers
 - o Steps to install the prerequisites
 - o Steps to download the install media
- Install the Application Features
 - o Install HSM
 - o Install Search
 - o Install Archive Manager for Files

Prepare the Application Servers

In this topic:

For the Archive Manager Database server (AMFDB)

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

For the HSM and Search server (AMFHSM)

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

For the Archive server (AMFSERVER)

- Steps to download the install media
- <u>Steps to install the prerequisites</u>
- **TIP:** We recommend completing all these tasks on each server using the Administrator account.

Steps to install the prerequisites

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

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

Archive Manager for Files

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

HSM

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

Search

Install-WindowsFeature -Name NET-Framework-Features

ArchiveWeb

```
Install-WindowsFeature -Name NET-WCF-HTTP-Activation45, Web-Server,
Web-Static-Content, Web-Http-Redirect, Web-Stat-Compression,
Web-Dyn-Compression, Web-Windows-Auth, Web-Basic-Auth
```

- **NOTE:** These PowerShell commands are compatible with a Window 2016 operating system. Please refer to the <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 download the install media

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

or

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

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

Install the Application Features

For the HSM and Search server (AMFHSM)

The installations steps described in <u>Install HSM and Archive Manager Search</u>includes the the installation of the *Archive Manager Post-processing* feature.

For the Archive Manager for Files server (AMFSERVER)

The installations steps described in <u>Installation of Archive Manager for Files</u> includes the the installation of all sub-features.

Install HSM

In this topic:

- Worksheet for this installation
- Steps to install HSM
- Steps to configure the HSM database connection
- Steps to install the HSM database
- Steps to configure the HSM stores and schemas

Worksheet for this installation

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

ltem	Description	Example
HSM server	The server where the HSM and Archive Manager Search will be installed.	AMFHSM
Administrator	Windows account that is used to install the application and run the Archive Manager for Exchange services.	username: democorp\domadmin password: ************
Media folder	Full path of the folder where the media files are extracted	C:\Metalogix
Installation folder	Full path of the folder where the application files will be installed	C:\Program Files (x86) \Metalogix
HSM Store folder	Full path of the folder that will contain the archived files.	C:\HSM The local hard drive folder is used as the default media store. Use of other media storage systems are described in the <i>Media Store Administration</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> <i>Windows Authentication</i> or <i>SQL</i> <i>Authentication</i>	Integrated Windows Authentication

Username	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.	AMFDB

Steps to install the application

- Log in to the server (eg. AMFHSM) with the Administrator credential (eg. democorp\domadmin)
- 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.



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 m DOMAIN\Username.	oust be in the format
Username:	
democorp \domadmin	
Password:	
Confirm password:	
•••••	
TostallChield	
<back next=""></back>	> Cancel

Enter the information as described below:

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

Steps to configure the HSM database connection

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

Database configuration	×
Database Connection Wizard	.
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

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

Database configuration	X
Database Connection Wizar	d 🤯
Set up your Microsoft SQL Ser	ver connection.
Please enter parameters which will be	used to create a connection to your Microsoft SQL Server.
Server name:	AMFDB
Initial catalog:	MAMHSM
Schema name:	dbo
Authentication:	Windows Authentication 🔹
Username:	
Password:	
	< Back Next > Cancel

For Microsoft SQL Server

- a. Server name name of the SQL server (eg. AMFDB)
- b. **Initial catalog** name of the HSM database (e.g. **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. **Username** database login username 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. Username database login username.
- 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	?
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	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
- 3. Scripts. The script installer wizard opens.

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

- 4. Select **Use the default credentials** to use the information displayed in the *Database connections* section. If you select **Use different credentials**, enter the following information:
 - a. Authentication authentication type used for the database. Choose either Windows authentication or SQL Server authentication
 - a. **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.
- 5. Click Next.



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

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

For Run the database scripts by this wizard

Database configuration	×
Set up the database	
Select the database objects you want to create.	
Please select database scripts you want to execute.	
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

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

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

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



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

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

Steps to configure the HSM stores and schemas

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

Media Store Administration Wizar	d	×
Create a new Media Stor	e	
Choose a na	ame and type for the Media Store.	
Media Store type: Name of the new Media Store:	Jukebox, Harddisk, Network Share FILESTORE	
	< Back Next > Cancel	

3. Click Next. The location information window opens.

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

Media Store Administration Wizard	
Jukebox, Harddisk, Network Share	
Please choose the PamServers where the Media Store should co Please choose how long the Media Stores pauses before it tries the PamServers. This gives the PamServer the possibility to start before the Media Store tries to connect to this PamServer the fir	nnect to: to connect to t completly 'st time.
HSM Servers where the Media Store should connect to:	Add Server
AMFHSM(HSM)	Specify the server where this store should connect.
	Server type: HSM Server 🔹
🛨 Add 🛛 🐹 Remove 🏠 Up 🕓 Down	Server name: AMFHSM
Connection interval between the Media Store and the HSM Server:	
10 ÷ seconds	OK Cancel
< Back Next >	Cancel

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

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

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: 100 ÷	
	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	ą,
To apply the changes you have made, restarted:	the following services should be
Name	Status
MAM HSM Base Operations MAM HSM Asynchronous Operations	Running Stopped
Do you want to restart the selected se	rvices?
	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	v schema 🛛 😥
Store:	FILESTORE@AMFHSM
Schema name:	FILESCHEMA
Enforce store:	
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 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	5
🕡 HSM 🕨 🕨	Stores Id Name Server Mirror of State 1 FILESTORE AMFHSM Running	
	New store Set up Delete Primary Manage Refresh Schemas Id Name Store Store Encryption Key Compression Task	
Ŋ	1 FILESCHEMA FILESTORE AMFHSM Create Solution Edit Solution Contact	

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

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

Steps to test the HSM and Media Store connectivity

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

HSM Test			8
HSM Server:	AMFHSM.democorp.com		
File identifier: Identifier type:	● HsmId C Guid		Name to FileId
	📮 Archive 📑 Retriev	e 🕞 🗙 Delete 🔟 Set retention	😫 Mass actions 👻
			Close

3. Click Archive. The Archive window opens.

rchive			E
Target schema:	FILESCHEMA (FILESTORE)		•
Retention time:	Fixed value 0	÷ months	
	C Infinite		
	○ Indefinite		
Use generated test files			
Unique content:	20200927230000267283760	lbdad49508b431b80d988b473f0254d	8
Original filename:	TestFile.txt		
O Use a specific test file			
Path to test file:			
Options:	🔽 Make each file unique	Force compression	
	🔲 Use invalid checksum	Force no compression	
	Archive empty file	Enable 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.

lesul	i		×
~	Step 1:	Success	
	HsmId:	1	
	Guid:	n/a	
~	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.

SM Test		×
HSM Server:	AMFHSM.democorp.com	
File identifier:	00000001	
Identifier type:		Name to FileId
	📮 Archive 📑 Retrieve 👻 Delete 🔟 Set ret	ention 🛛 🔯 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 installs the Search and Post Processing services which allows a user to search and run specific tasks on each archived message. Archive Manager Search can be installed on a dedicated server, but in keeping with the topology described in the <u>Deployment Plan</u> we will install the Archive Manager Search and Post Processing service on the same server where HSM was installed (eg. AMFHSM).

In this topic:

For Archive Manager Search

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

For Post Processing

- Steps to configure the Post Processing database connection
- <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.	AMFHSM
Administrator	Windows account that is used to install the application and run the Archive Manager for Exchange services.	username: democorp\domadmin password: *************
Media folder	Full path of the folder where the media files are extracted	C:\Metalogix

Installation folder	Full path of the folder where the application files will be installed	C:\Program Files (x86) \Metalogix
HSM Store folder	Full path of the folder that will contain the archived files.	C:\HSM The local hard drive folder is used as the default media store. Use of other media storage systems are described in the <i>Media Store Administration</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.	FILESTORE
Schema name	Name of a schema in a hard drive media store.	FILESCHEMA
Database Authentication method	Type of database authentication: <i>Integrated</i> <i>Windows Authentication</i> or <i>SQL</i> <i>Authentication</i>	Integrated Windows Authentication
Username	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.	AMFDB

Steps to install Archive Manager Search

- 1. Log in to the server where HSM was installed (eg. **AMFHSM**) with the credentials of the superuser (eg. **democorp\domadmin**)
- 2. Download the installation media. For more information see <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.
- 9. Click **Yes** to accept the license. The *Setup Type* window opens. Click **Print** if you wish to print the license agreement.



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

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

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\MAMSear	th\Index\File		
	an pridex y lie		
			Browse
InstallShield			
	< <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	< Pade	Nexts	Cancol
		<u>N</u> ext >	Cancel

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

rehive Manager Coards	
chive Manager Search	
Logon Information	
Specify a user account and password.	
Specify the user account to be used by this application. User a DOMAIN/Username.	accounts must be in the format
Username:	
democorp\domadmin	
Password:	
•••••	
Confirm password:	
•••••	
<u></u>	
stallShield	

Enter the information as described below:

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

- 13. Click Next. The *Firewall Settings* window appears. Select the check box Allow programs to communicate through Windows Firewall.
- 14. Click Next. The Ready to Install the Program window opens.
- 15. Click Install. The InstallShield Wizard Complete window opens.

Steps to configure the Search database connection

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

Database configuration	×
Database Connection Wizar	rd 😴
Set up your Microsoft SQL Set	rver connection.
Please enter parameters which will be	used to create a connection to your Microsoft SQL Server.
Server name:	AMFDB
Initial catalog:	MAMSEARCH
Schema name:	dbo
Authentication:	Windows Authentication 🔹
Username:	
Password:	
	< Back Next > Cancel

For Microsoft SQL Server

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

For Oracle

a. Oracle net name - net service name that describes the network address of the HSM database in your tnsnames.ora file (eg. AMFDB)

- b. **Schema** name of the HSM database (e.g. **MAMSEARCH** which is the default name of the Archive Manager Search database)
- c. Username database login username
- 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 confirmation window opens.
- 7. Click **Finish** to close the *Database Connection* wizard.

Steps to install the Search database

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



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

Database configuration	×		
Run scripts			
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		

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 *Configuration* wizard displays the status and version of the scripts.

Steps to configure the Post Processing database connection

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

Database configuration	8
Database Connection Wizar	d 😽
Set up your Microsoft SQL Set	rver connection.
Please enter parameters which will be	used to create a connection to your Microsoft SQL Server.
Server name:	AMFDB
Initial catalog:	MAMINDEX
Schema name:	dbo
Authentication:	Windows Authentication 🔹
Username:	
Password:	
	< Back Next > Cancel

For Microsoft SQL Server

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

For Oracle

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



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

Steps to install the Post Processing database

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



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

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

Database configuration		×	
Run scripts		¢	
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 > Can	cel	

Enter the information as described below:

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

Steps to configure Search Scopes

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

Add Search scope		X
Add an	chive server connection	
Server name:	AMFSERVER	
Type:	Files Archive Server 🗸	
	< Back Next > Cano	el 👘

Enter the information and described below:

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

-or-

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

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

Database configuration	8
Database Connection Wizard	
Set up your Microsoft SQL Server	connection.
Please enter parameters which will be used t	o create a connection to your Microsoft SQL Server.
Server name: AMFD	В
Initial catalog: MAMF	ILE
Schema name: dbo	
Authentication: Wind	ows Authentication 🔹
Username:	
Password:	
	< Back Next > Cancel

For Microsoft SQL Server

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

For Oracle

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

- Username database login username.
- 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.
- 5. The *Configuration* window for the *Archive* database reopens.

Configuration	B	
Set up th	e Archive database connection	
Provider:	Microsoft SQL Server	
Server name:	AMFDB.democorp.com	
Initial catalog:	MAMFILE	
Schema name:	dbo	
Username:	(Windows Authentication)	
Import Cor	nfigure < Back Next > Cancel	

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

-or-

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

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

Database configuration		×			
Database Connection Wiza	ard	?			
Set up your Microsoft SQL Se	Set up your Microsoft SQL Server connection.				
Please enter parameters which will be	e used to create a connection to your Microsoft SQL Server.				
Server name:	AMFDB				
Initial catalog:	MAMINDEX				
Schema name:	dbo				
Authentication:	Windows Authentication 🔹				
Username:					
Password:					
	< Back Next > Cancel				

For Microsoft SQL Server

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

For Oracle

- Oracle net name net service name that describes the network address of the HSM database in your tnsnames.ora file (eg. AMFDB).
- Schema name of the Archive Manager for Files database (e.g. MAMINDEX which is the default name of the Archive Manager for Files database).
- Username database login username.
- 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.

8. The *Configuration* window for the *Index* database reopens.

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

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

Configuration			8
j Index	directory.		
Index directory:	C:\SEARCH		Browse
		< Back Next >	Cancel

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

😤 Configuration	
Configure Sear	ch
	Database Search Scopes Connectivity
archiveWeb	A Manage search scopes
Auditing	AMXSERVER AMFSERVER
可 нам	
🕡 Files Archive	
o Users	
Texchange Archive	Configuration summary Server type: Files Archive
o Search	Server name: AMFSERVER Database: AMFSERVER\MAMFILE Index director: C\Program Files (V86\)Matalogiy\M&MSearch\Index\File
Dost Processing	
	Add Remove Configure

12. Close the *Configuration* wizard.

Steps to configure Post Processing Scopes

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

Add Post Processing scope		×
Specify	the server for Post Processing	
Server name:	AMFSERVER	
Туре:	Archive server for Files 🔹	
	OK Cancel	

Enter the information and described below:

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

Install Archive Manager for Files

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

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

Activate License Key	×
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.
- 10. Click Next. The Setup Type window opens.

Archive Manage	r For Files	Х
Setup Type Select the set	tup type to install.	
Please select	a setup type.	
● <u>C</u> omplete	All program features will be installed. (Requires the most disk space.)	
O Cu <u>s</u> tom	Select which program features you want installed. Recommended for advanced users.	
InstallShield ——	< <u>B</u> ack <u>N</u> ext > C	ancel

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

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

Archive Manager For Files			×
Archive Manager site port Information Please define the Archive Manager site port.			
Archive Manager sites port number: 80			
Note: port number should be between 1 <-> InstallShield	65535 < <u>B</u> ack	<u>N</u> ext >	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 Files		×
Specify the HSM server.		
HSM server:		
AMFHSM		Browse
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 **Next**. The *Logon Information* window opens.

and ger for thes					
ogon Information					
Specify a user account and	password.				
Specify the user account to DOMAIN\Username.	be used by this a	application. User	accounts mu	ist be in the format	
Username:					
 DEMOCORP\domadmin					
DEMOCORP\domadmin					
 DEMOCORP\domadmin Password:					
DEMOCORP\domadmin					
DEMOCORP\domadmin					
DEMOCORP\domadmin					
DEMOCORP\domadmin Password: Confirm password:					
DEMOCORP\domadmin Password: Confirm password:					
DEMOCORP\domadmin Password: Confirm password: Confirm password:					
DEMOCORP\domadmin					

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

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

Configure Archive Manager

In this topic:

- Steps to configure the Archive Manager database connection
- Steps to install the Archive Manager database

Steps to configure the Archive Manager database connection

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



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

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 Microsoft SQL Server.	
Server name:	AMFDB	
Initial catalog:	MAMFILE	
Schema name:	dbo	
Authentication:	Windows Authentication 🔹	
Username:		
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. **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. **Username** database login username 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 thsnames.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. Username database login username.
- d. Password password of the database user.
- 6. 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

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

Steps to install the Archive Manager database

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



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

Database configuration		×
Run scripts		00
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 o the database.	or
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.
- 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.
- 4. Click **Next**. If you chose to view the SQL scripts then the *View SQL scripts* window opens. If you chose to view the Oracle scripts then the *View Oracle scripts* window opens. Click **Save Script** to save the script as a script file to a folder. Check the **Word wrap** check box to display long lines as multiple lines of text.
- 5. Click **Next**. The *Run SQL scripts* window reopens with the scripts you have chosen to run.



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

🎇 Configuration		
Configure Fil	es Archive	Database Settings
audiking	X Archive options	
可 нэм	Archive server: AMFSERVER HSM server: AMFHSM	
Files Archive	Minimum size of the file to 4 KB	
可 Users		
🕡 Search		
🕡 Post Processin	L	
ß		Apply

8. Close the Configuration wizard.

Addendum

8

In this chapter:

- <u>Remote HSM Server</u>
- Troubleeshooting: Adobe reader X is not able to open archived PDFs
- License Activation

Remote HSM Server

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

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

On the HSM server, follow these steps:

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

Final	llv	click	ОК
I IIIa		UIIUN	UN.

No. Services							
<u>File Action View</u>	Help						
	à 🗟 😫 🖬 🕨 🗉						
Services (Local)	Name A MAM Auditing MAM HSM Asynchron MAM HSM Base Op MAM Search MAMEXDirectArchiv MAMEXExchangeSv MAMEXExchangeSv MAMEXEGuardSv MAMEXHandler MAMEXManagerSv MAMEXAnagerSv MAMEXSchedulerSv MAMFsaArchiverSv	Description Auditing se MAM-STOR Start Stop Payse Resume Restart All Tasks Refresh	Status Started M/ Star Star Star Star Star Star	Startup Type Automatic AM HSM Base Oper General Log On R Log on as: C Local System ac Allow service Inis account:	Log On As Local System ations Propert ecovery Deper count to interact with c administrat	ties (Local Con ndencies	mputer) ?
	MAMFsaGuardSv MAMfsaHandlerSv MAMfsaRemoteSer MAMLogSv MAMPostProcessingSv MAMPostProcessingSv MAMPSTImporterSv	Properties	Star Star	Password: Confirm password You can enable or d Hardware Profile Profile 1	d: •••••••	e for the hardwa	re profiles listed below: Service Enabled
Opens the properties dia	log box for the current select	ion.					
						Enabl	e <u>D</u> isable

- b) DCOM Rights has to be reduced in two locations to
 - AuthenticationLevel="None"
 - ImpersonationLevel="Anonymous"

and after that the IIS have to be reset.

On the HSM Server follow these steps:

- Open machine.config from: C:\WINDOWS\Microsoft.NET\Framework\v2.0.50727\CONFIG\machine.config In case the 64-bit .NET FrameWork open: C:\WINDOWS\Microsoft.NET\Framework64\v2.0.50727\CONFIG\machine.config
- 2. Locate the entry for "processModel" and add:

comAuthenticationLevel="None" comImpersonationLevel="Anonymous"

The entry then looks as follows:

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

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

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

My Computer Proper	ties					? ×
Default Protocol	s	MSDTC			4 Security	
General	0	ptions		Default P	roperties	
☑ Enable Distribute	d COM or	n this compute	Ì			
Enable COM Inte	ernet Servi	ices on this co	mpute	er		
Default Distributed	COM Cor	nmunication P	roperti	ies		_
The Authentication	n Level sp	ecifies security	, at th	e packet lev	vel.	
Platault Authoritie	action Los					
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7. Finally reset IIS.

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

Problem description:

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

Solution:

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

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

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

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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:	
	 Online activation (requires online internet connection) 	
	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: Username: 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. **Username** 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



- 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

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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 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