

Metalogix[®] Archive Manager for Files 8.4

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 2012
- Windows Server 2012 R2
- Windows Server 2016
- Windows Server 2019
- **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
- o Web Server / Security / Basic Authentication
- \circ Web Server / Security / Windows Authentication
- \circ Web Server / Application Development
 - .NET Extensibility 3.5
 - .NET Extensibility 4.5
 - ASP.NET 3.5
 - ASP.NET 4.5
- o 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 4.5 Features

For Windows Server 2012 and 2012 R2

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

For Windows Server 2016

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

For Windows Server 2019

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

Redistributable packages

• Microsoft Visual C++ 2008 SP1 Redistributable Package (x64)

- Microsoft Visual C++ 2010 Redistributable Package (x64)
- Microsoft Visual C++ 2010 Redistributable Package (x86)
- Microsoft Visual C++ 2013 Redistributable Package (x64)
- Microsoft Visual C++ 2017 Redistributable Package (x64)
- Microsoft Visual C++ 2017 Redistributable Package (x86)

Database Servers and Drivers

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

Web Browsers

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

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

File Systems (Sources)

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

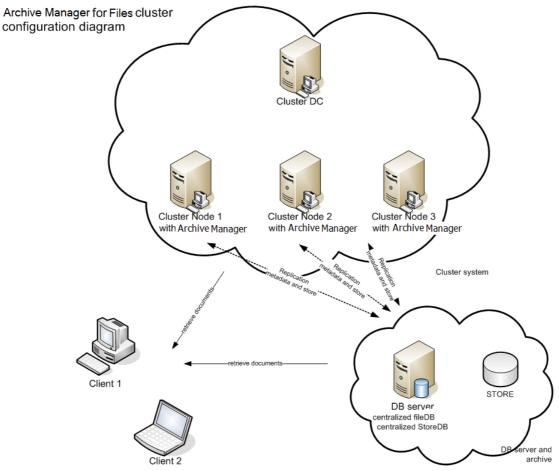
For HSM Server

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

- .NET Framework 3.5 if not available, setup will continue but the following store types will not be functional in connection with the HSM system: Amazon S3, Windows Azure, Caringo CAStor, EMC Atmos, FileNet IS, Hitachi HCAP, Nirvanix, Rackspace, Simple Foldering Store, XAM
- .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 user name and the password are created by using SQL Server and stored in SQL Server. When using SQL Server Authentication, you must set strong passwords for all SQL Server accounts.

For Oracle

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

Advanced Installation

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

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

Worksheet for this installation

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

Item	Description	Example
HSM server	The server where the HSM and Archive Manager Search will be installed.	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 Advanced Installation option of the installer wizard, only a local hard drive can be setup as a media store.	FilesStore

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

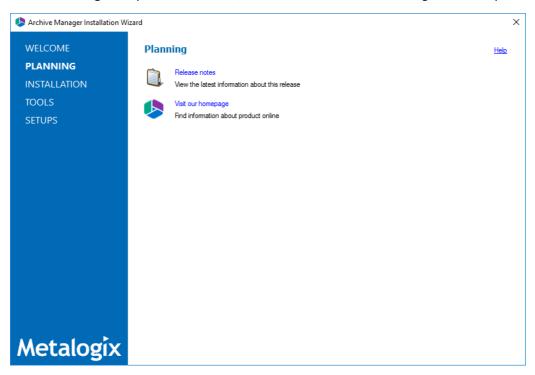
Steps to install HSM and Archive Manager Search

- 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.

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

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

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

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

Archive Manager Installation W	izard	×
WELCOME PLANNING	Installation Components	<u>Help</u>
INSTALLATION TOOLS SETUPS	Component Setup version HSM 8.4.0.34 Archive Manager for Files 8.4.0.34 Archive Manager for Exchange 8.4.0.34 Archive Manager for Exchange 8.4.0.34 Archive Manager Search 8.4.0.34 Archive Web 8.4.0.34	Installed version
	Product description: ArchiveWeb offers an intuitive interface to access archived data and provides search templates, advanced search categorization abilities, legal hold, full auditing, 3rd party export and collaborative eDiscovery review capabilities. Installation folder: [C:\Program Files (x86)\Metalogix	n filters, tagging and
Metalogix	< Back Next >	

7. Click Next. The Installation Components window opens.

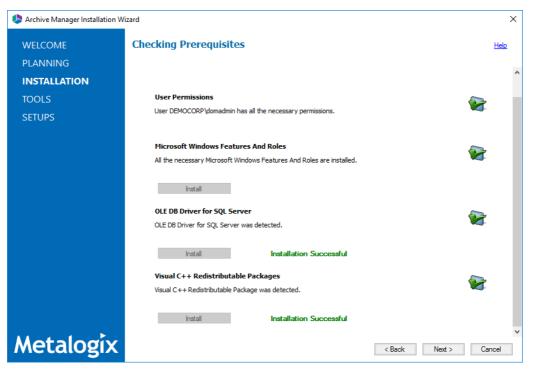
Select HSM and Archive Manager Search.

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

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

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

9. Click Next. The Checking Prerequisites window opens with database-specific prerequisites.



If one or more prerequisites are missing, the **Next** button is deactivated. Click **Install** to install each prerequisite.

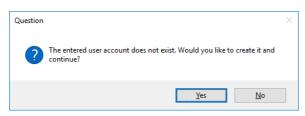
10. Click **Next**. The *Superuser Account* window opens.

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

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

If the superuser does not exist, the wizard will request permission to create the superuser account in the Active Directory and grant the necessary permissions on this server to work

with the installed features. If the superuser exists, the dialog shown below does not appear. If the permissions dialog appears, click **Yes**.



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

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	нѕм		MSSQL	
	Archive Manager Search		MSSQL	
	Archive Manager Post-Processing		MSSQL	
	₽ 2↓ □			
	✓ Authentication			
	Authentication UserLogin	Integrated Windo	ows Authentication	
	Password			
	 Server instance 			
	TableOwner ServerName	dbo AMFDB		
	DatabaseName	MAMHSM		
	Authentication Authentication type			
Metalogix			< Back	Next > Cancel

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

Enter the database parameter values described below:

For Microsoft SQL Server

- a. Authentication database authentication method.
- b. UserLogin Username if SQL Authentication or Oracle client is selected. Otherwise this field is deactivated.
- c. **Password** Database password if **SQL Authentication** or **Oracle client** is selected. Otherwise this field is deactivated.
- d. **TableOwner** Username of the installer account without the domain prefix. For example **dbo**.
- e. **ServerName** The name of the server where you are installing the HSM and Archive Manager Search.

f. **DatabaseName** - The name of the database that will contain the HSM metadata. The default name is **MAMHSM**.

For Oracle

- a. Oracle net name net service name that describes the network address of the database server in your tnsnames.ora file.
- b. Schema name of the Oracle schema from your tnsnames.ora file.
- c. User name database login user name.
- d. Password password of the database user.
- 13. From the *Component* column, select **Archive Manager Search** and verify the database parameter values.
- 14. From the *Component* column, select **Archive Manager Post-Processing** and verify the database parameter values.
- **i NOTE:** When you specify the HSM database parameter values, they are carried over to the database specification for each feature in the list. While the features will be installed on the same server, the database to host the metadata for each feature can be on a different server and the database specifications section for each feature can be customized accordingly.

Archive Manager Installation W	izard	×
WELCOME	Hierarchical Storage Manager Settings	<u>Help</u>
PLANNING		
INSTALLATION	The Hierarchical Storage Manager (HSM) stores the archived content of files. The HSM also manages the Single Instance Function so that indentical files are stored only once no matter how many times they	
TOOLS	occur in the file system.	
SETUPS	Local HSM installation	
	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 > Ca	ancel

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

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.

Archive Manager Installation Wi	izard	×
WELCOME	Archive Manager Search Settings	Help
PLANNING		
INSTALLATION	Search server: AMFHSM	
TOOLS	Search index folder:	
SETUPS		
	To keep the default folder click Next. To specify a different folder click Browse.	
	For emails: C:\Program Files (x86)\Metalogix\MAMSearch\Index\Mail Browse	
	For files: C:\Program Files (x86)\Metalogix\MAMSearch\Index\File Browse	
Metalogix	< Back Next >	Cancel
5		

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.

l Archive Manager Installation Wi	izard	×
WELCOME	Firewall Settings	<u>Help</u>
PLANNING		
INSTALLATION	☑ Allow programs to communicate through Windows Firewall	
TOOLS	Mow programs to communicate unough windows niewait	
SETUPS		
Metalogix	< Back Next > (Cancel

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.

schive Manager Installation W	fizard	×
WELCOME	Summary Installation	<u>Help</u>
PLANNING	This is the installation summary.	
INSTALLATION	Components to be installed:	â
TOOLS		
SETUPS	Product name: HSM Version: 8.4.0.69 HSM schema name: FilesSchema HSM store path: C:\HSM HSM store path: C:\HSM	
	Product name: Archive Manager Search Version: 8.4.0.69 Search novider: PAMSEARCH Search index folder (AM for Exchange): C:\Program Files (x86)\Metalogix\MAMSearch\Index\Mail Search index folder (AM for Files): C:\Program Files (x86)\Metalogix\MAMSearch\Index\File	
	Installation folder: C:\Program Files (x86)\Metalogix	
		~
Metalogix	< Back Install >	Cancel

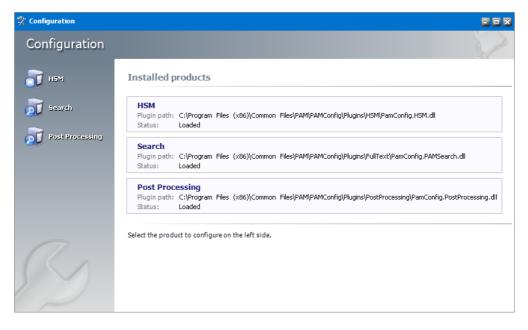
20. Click Install to start the installation.

Archive Manager Installation Wi	izard		×
WELCOME PLANNING	Installation	<u>He</u>	Þ
INSTALLATION TOOLS SETUPS	DCOM access and launch permissions Image: Comparison of the second sec	Completed Completed Completed Completed	
	Starting services	Completed	~
Metalogix		Finish	

- 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.

🞇 Configuration						
Configure HSM	Datab	oase Stores	Advanced	Diagnostics	Encryption	Packer Tasks
isearch	Provider: Server name:	ection Microsoft SQI AMFDB	Server			
Post Processing	Initial catalog: Table owner: User name:	MAMHSM dbo (Windows Au	thentication)		
	C Scripis					Configure
0	Database version: Scripts version:	8.4.0.39 8.4.0.39				
19	-					Run scripts

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	B
🔂 HSM 🕨	Stores Id Name Server Mirror of State 1 FILESSTORE AMFHSM	
Dost Processing	< Set up Set up Set up Set up Set up Refresh	
	Schemas Store Server Force Store Encryption Key Compression Task 1 FilesSchema FILESSTORE AMFHSM yes	
59	< Create Zedit Delete Z Test Refresh	

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

🛠 Configuration					
Configure Sear	ch		Database	Search Scopes	Connectivity
🛐 нэм	🤴 Database conn	ection			
🧟 Search 🕨 🕨	Provider: Server name:	Microsoft SQL Server AMFDB			
Post Processing	Initial catalog: Table owner:	MAMSEARCH dbo			
	User name:	(Windows Authentication)			
	Scripts				onfigure
	Database version:	8.4.0.18			
17.	Scripts version:	8.4.0.18 is up to date.			
				Ru	in scripts

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

🛠 Configuration			
Configure Post	Processing	Database General Settings	Post Processing Scopes OCR Engine
🛐 нэм	😼 Database conne	ection	
<u> 5</u> Search	Provider: Server name:	Microsoft SQL Server AMXDB	
	Initial catalog:	MAMINDEX	
Post Processing 🕨	Table owner:	dbo	
	User name:	(Windows Authentication)	
			Configure
	Construction Scripts		
	Database version:	8.4.0.16	
	Scripts version:	8.4.0.16	
01	🥝 Your database	is up to date.	
			Run scripts

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>
- Steps to install Metalogix Archive Manager for Exchange
- Steps to configure and verify the Archive server

Worksheet for this installation

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

ltem	Description	Example
License Key	The license key that you received from Quest. If you don't have a license key, contact your Quest representative.	894K5-3M448-M544E-A594A- 7K8Z7 (Sample only. This key is neither an active nor an expired license key)
Archive Manager for Exchange server	The server where the Archive Manager for 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: Integrated Windows Authentication or SQL Authentication	Integrated Windows Authentication
UserLogin	Username if <i>SQL Authentication</i> is selected	dbadmin
Password	Database password if <i>SQL</i> <i>Authentication</i> is selected	****
Database server	The database server instance name where the databases for Archive Manager for Files will be installed.	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.

Archive Manager Installation Pa	kage	Х
WELCOME	The Industry's Most Trusted Collaboration Tools Today	
PLANNING		
INSTALLATION	Archive Migrator Archive Manager StoragePoint	
TOOLS		
SETUPS	MIGRATE THIRD PARTY EMAIL, FILE & SHAREPOINT STORAGE OPTIMIZATION &	
	ARCHIVES ARCHIVING PERFORMANCE	
	E Exchange 1 Office 365 SharePoint	
	Store (Sold and Sold	
Metalogix		

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

Archive Manager Installation Wiz	zard	×
WELCOME	Planning	<u>Help</u>
PLANNING	Release notes	
INSTALLATION	View the latest information about this release	
TOOLS	Visit our homepage End information about product online	
SETUPS	Find information about product online	
Metalogix		

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

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

Archive Manager Installation P	ackage	Х
WELCOME	Server Installation	<u>elp</u>
PLANNING		
INSTALLATION	Software Transaction Agreement	^
TOOLS	PLEASE READ THIS AGREEMENT CAREFULLY BEFORE USING THIS PRODUCT. BY DOWNLOADING, INSTALLING OR USI THIS PRODUCT, YOU ACCEPT AND AGREE TO THE TERMS AND CONDITIONS OF THIS AGREEMENT. FOR ORDERS PLAC	
SETUPS	OUTSIDE THE UNITED STATES OF AMERICA, PLEASE GO TO <u>http://guest.com/lega/staa.sox</u> TO VIEW THE APPLICABLE VERSION OF THIS AGREEMENT FOR YOUR REGION. IF YOU DO NOT AGREE TO THE TERMS AND CONDITIONS OF TH AGREEMENT OR THE APPLICABLE VERSION OF THIS AGREEMENT FOR YOUR REGION, DO NOT DOWINLOAD, INSTALL USE THIS PRODUCT. IF YOU HAVE A SIGNED AGREEMENT WITH PROVIDER THAT IS SPECIFICALLY REFERENCED IN ORDER THAT IS EXECUTED BETWEEN YOU AND PROVIDER, THEN THAT SIGNED AGREEMENT WILL SUPERSEDE TH AGREEMENT.	ile IIS OR AN
	This Software Transaction Agreement (the "Agreement") is made between you, the Customer ("Customer" or "You") and t Provider, as defined below.	the
	1. Definitions. Capitalized terms not defined in context shall have the meanings assigned to them below:	
	(a) "Affiliate" means any legal entity controlling, controlled by, or under common control with a party to this Agreement, for long as such control relationship exists.	80
	(b) "Appliance" means a computer hardware product upon which the Software is pre-installed and delivered.	
	(c) "Documentation" means the user manuals and documentation that Provider makes available for the Software, and copies of the foregoing.	all
	(d) "eStore" means Provider's online Software ordering system located at http://guest.com/shop/.	
	(e) "License Entitlements" means the quantities and versions of Products licensed to Customer, the new versions a I accept the terms of the license agreement.	ind Y
Metalogix	Next > Cance	1

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

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

7. Click Next. The Installation Components window opens.

Archive Manager Installation Wi	izard	×
WELCOME PLANNING	Installation Components	<u>Help</u>
INSTALLATION TOOLS SETUPS	Component Setup version HSM 8.4.0.69 Archive Manager for Files 8.4.0.69 Archive Manager for Exchange 8.4.0.69 Archive Manager Search 8.4.0.69 Archive Web 8.4.0.69	Installed version
Metalogix	Archive parallel messages in real time, as needed, to on-premises, hybrid or cloud locations. Users can search through archived emails and restore them in one-click. Installation folder: C:\Program Files (x86)\Metalogix	Browse lext > Cancel

Select Archive Manager for Files.

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

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

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

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

9. Click **Next**. The *Checking Prerequisites* window opens.

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

If one or more prerequisites are missing, the **Next** button will appear deactivated. Click **Install** for each prerequisite to install the missing features. Scroll down to expose and install all the prerequisites.

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

Activate	: License Key	×
Q	Enter license key and select the activation method	
	License key:	
	Activation mode: 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.

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

Archive Manager Installation With the second sec	zard	×
WELCOME PLANNING	Superuser Account	<u>Help</u>
INSTALLATION TOOLS SETUPS	It is important to specify an account under which Metalogix services will be running. It must be a local administrator and must have admin rights on Archive Manager's databases and Exchange server. If you have more than one Exchange server in the domain, then this user should exist on the server with the newer version of Exchange. Please specify the credentials for this account. Superuser name (domain\user): DEMOCORP\domadmin	
	Password:	
Metalogix	< Back Next > C2	ancel

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

S Archive Manager Installation Wizard				
WELCOME	Database Server Connection			<u>Help</u>
INSTALLATION	Please fill in all values which will be used to create a connection to your Database Server.			
TOOLS	Component		DB Server	
SETUPS	Archive Manager for Files		MSSQL	
	Archive Manager Multitenant		MSSQL	
	Archive Manager Auditing		MSSQL	
	Authentication Authentication	Integrated Wind	ows Authentication	
	UserLogin Password			
	Server instance TableOwner	dbo		
	ServerName	AMFDB		
	DatabaseName Authentication	MAMEXCH		
	Authentication type			
Metalogix			< Back	Next > Cancel

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

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

Enter the database parameter values described below:

For Microsoft SQL Server

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

For Oracle

- a. Oracle net name net service name that describes the network address of the database server in your tnsnames.ora file.
- b. Schema name of the Oracle schema from your tnsnames.ora file.
- c. User name database login user name.

d. Password - password of the database user.

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

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

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

Archive Manager Installation	Wizard	×
WELCOME	Archive Manager Search Settings	Help
PLANNING		
INSTALLATION	Search server: AMFHSM	
TOOLS		
SETUPS		
Metalogix	< Back Ne	ext > Cancel

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

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

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

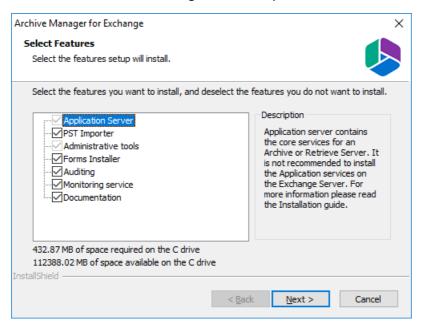
Archive Manager Installation Wi	izard	×
WELCOME	Firewall Settings	<u>Help</u>
PLANNING		
INSTALLATION	Allow programs to communicate through Windows Firewall	
TOOLS	Priore programs to communicate unough remotes a newall	
SETUPS		
Metalogix	< Back Next > C	ancel

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

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

s Archive Manager Installation Wi	izard	×
WELCOME PLANNING	Summary Installation	<u>Help</u>
INSTALLATION TOOLS SETUPS	This is the installation summary. Components to be installed: Product name: Archive Manager for Files Version: 8.4.0.69 Installation folder: C:\Program Files (x86)\Metalogix	^
		÷
Metalogix	Start Metalogix Archive Manager for Files	Cancel

- 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.
- 16. Click Install to start the installation.
- 17. When the installer starts installing the Archive Manager for Files feature, the *Select Features* window of the Archive Manager for Files opens.



Mandatory features

- Application Server
- Administrative tool

Optional features

- Auditing
- Monitoring service

Optional resources

• Documentation

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

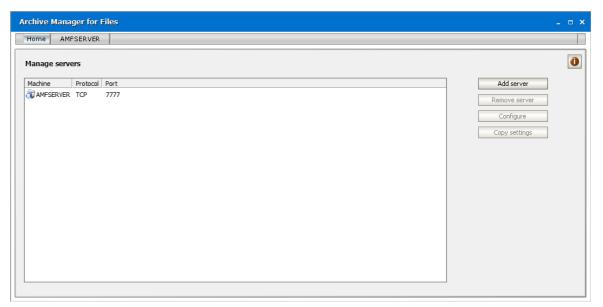
18. Click **Next** to continue the installation. If a feature installation fails or completes with a warning, expand the row to view and address the problem.

Archive Manager Installation Wi	zard		×
WELCOME PLANNING	Installation	He	<u>lp</u>
INSTALLATION TOOLS SETUPS	DCOM access and launch permissions Archive Manager for Files Archive Manager Multitenant Archive Manager Auditing Starting services	Completed Completed Completed Completed	$\langle \langle \langle \langle \langle \rangle \rangle \rangle \rangle \rangle$
Metalogix		Finish	

- 19. Click **Finish** to complete the installation step.
- 20. 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)



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

Archive Manager	for Files	_ = ×
Home AMFSE	RVER	
Archive Scheduler Restrictions Settings Statistics	Files on AMXSERVER Image: Comparison of the second secon	8
	Clear selection Archive F Versions	Restore

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-</u> <u>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

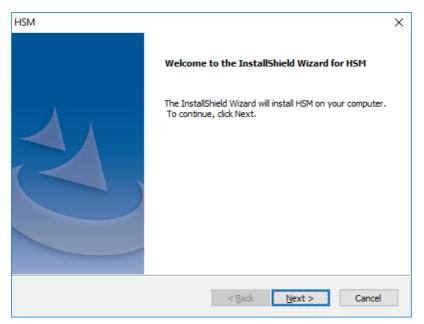
The following information will be required through the installation process. Sample values are provided here as a guidance.

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: Integrated Windows Authentication or SQL Authentication	Integrated Windows Authentication

UserLogin	Username if <i>SQL Authentication</i> is selected	dbadmin
Password	Database password if SQL Authentication is selected	*****
Database server	The database server instance name where the databases for Archive Manager for Files will be installed.	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.	ust be in the format
User name:	
democorp \domadmin	
Password:	
Confirm password:	
•••••	
InstallShield	
< <u>B</u> ack <u>N</u> ext >	Cancel

Enter the information as described below:

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

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

Select Allow programs to communicate through Windows Firewall.

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

HSM	×
Ready to Install the Program The wizard is ready to begin installation.	
Click Install to begin the installation.	
If you want to review or change any of your installation settings, dick Back. C exit the wizard.	lick Cancel to
InstallShield	
< <u>B</u> ack <u>Install</u>	Cancel

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

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

12. Click **Finish** to close the installer. 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	S	
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		
O Oracle		
The following page will let you specify the database connection parameters.		
< Back Next > Can	icel	

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	×
Database Connection Wizar	rd 😨
Set up your Microsoft SQL Se	rver connection.
Please enter parameters which will be	used to create a connection to your Microsoft SQL Server.
Server name:	AMFDB
Initial catalog:	MAMHSM
Schema name:	dbo
Authentication:	Windows Authentication 🔻
User name:	
Password:	
	< Back Next > Cancel

For Microsoft SQL Server

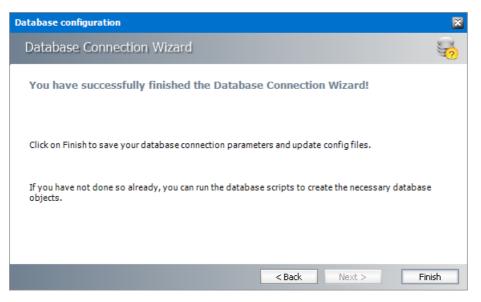
- a. Server name name of the SQL server (eg. AMFDB)
- b. Initial catalog name of the HSM database (e.g. MAMHSM which is the default name of the HSM database)
- c. Schema name name of the SQL Schema (e.g. dbo)
- d. Authentication authentication type used for the database. Choose either Windows authentication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

For Oracle

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

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

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



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

Database configuration	×	
Set up the database		
? Select the method for setting up the database.		
Please select the way you want to set up the HSM database:		
Run the database scripts by this wizard		
$\ensuremath{\mathbb{C}}$ Get the database scripts and run them manually		
< Back Next > Cancel		

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	

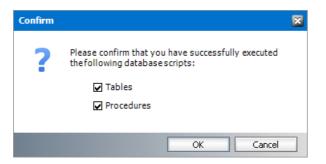
Select both check boxes: Create tables and Create procedures.

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.

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

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).

🞇 Configuration					
Configure HSM	Datab	ase Stores	Advanced	Diagnostics	Encryption Packer Tasks
🕡 н5м 🕨	Provider: Server name: Initial catalog: Table owner:	Microsoft SQI AMFDB MAMHSM dbo			
R)	User name: Scripts Database version: Scripts version: Q Your database i	(Windows Au 8.4.0.39 8.4.0.39 s up to date.	thentication	,	Configure Run scripts

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:	Jukebox, Harddisk, Network Share	
Name of the new Media Store:	FILESTORE	
	< Back Next > Cancel	

3. Click Next. The location information window opens.

Media Store Administration W	/izard	×
Jukebox, Harddisk, N	etwork Share	
	a location where the archived files should be saved. Ipported 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:	Ψ.	
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	t connect to t completly
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	¢.
To apply the changes you have made, t restarted:	he following services should be
Name	Status
MAM HSM Base Operations MAM HSM Asynchronous Operations	Running Stopped
Do you want to restart the selected ser	vices?
	Yes No

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

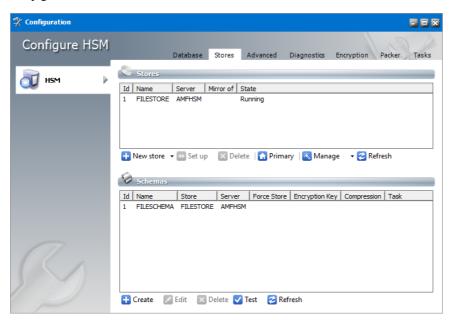
- 9. Verify that the media store information appears in the *Stores* tab of the *Configuration* wizard.
- 10. From the *Schemas* section in the *Stores* tab of the the *Configuration* wizard, click **New Schema**. The *Create new schema* window opens.

HSM Schema	8
Create new	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.



- 13. Close the *Configuration* wizard.
- **i NOTE:** The steps to create a local media store described above with default values completes the HSM installation. HSM offers more capabilities that can be configured. Configuration of HSM is described in detail in the *HSM Installation and Configuration Guide*. A large selection of media store types that are supported by Metalogix Archive Manager for Files are described in the *Media Store Administration Guide*.

Steps to test the HSM and Media Store connectivity

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

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

3. Click Archive. The Archive window opens.

rchive	l
Target schema:	FILESCHEMA (FILESTORE)
Retention time:	Fixed value 0 months
	C Infinite
	C Indefinite
O Use generated test files	
Unique content:	2020092723000026728376dbdad49508b431b80d988b473f0254d
Original filename:	TestFile.txt
O Use a specific test file	
Path to test file:	
Options:	🔽 Make each file unique 🛛 🗌 Forcecompression
	🔽 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.

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

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

HSM Server:	AMFHSM.demo	corp. com			
	AMEHSMILdemo	corp.com			
File identifier:	0000001				
Identifier type:	• HsmId	🔿 Guid			<u>Name to FileId</u>
	📒 Archive	📑 Retrieve	🕶 🔀 Delete	Set retention	🔅 Mass actions

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
- <u>Steps to configure Search Scopes</u>

For Post Processing

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

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

Worksheet for this installation

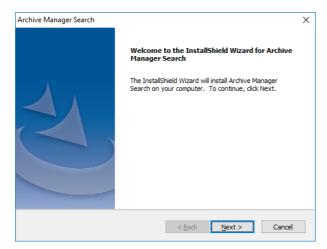
The following information will be required through the installation process. Sample values are provided here as a guidance.

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>	Integrated Windows Authentication

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

icense Agreement	
Please read the following license agreement carefully.	₽
Press the PAGE DOWN key to see the rest of the agreement.	
Software Transaction Agreement	^
PLEASE READ THIS AGREEMENT CAREFULLY BEFORE USING THIS PRODUCT. BY DOWNLOADING, INSTALLING OR USING THIS PRODUCT, YOU ACCEPT AND AGREE TO THE TERMS AND CONDITIONS OF THIS AGREEMENT. FOR ORDERS PLACED OUTSIDE THE UNITED STATES OF AMERICA, PLEASE GO TO http://guest.com/legal/sta.aspx TO VIEW THE APPLICABLE VERSION OF THIS AGREEMENT FOR YOUR REGION. IF YOU DO NOT AGREE TO THE TERMS AND CONDITIONS OF THIS AGREEMENT OR THE APPLICABLE VERSION OF THIS AGREEMENT EON YOUR DECIM. DO NOT POWING AD WETCH ON THE TERMS DO you accept all the terms of the License Agreement? If you select No, the setup will close. To install Archive Manager Search, you must accept this agreement.	~
<back no<="" td="" yes=""><td>_</td></back>	_

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

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

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

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

Archive Manager Search			Х
Choose Destination Location Select folder where setup will install fi	iles.		
Please select the path for the file inde	ex		
C:\Program Files (x86)\Metalogix\M	AMSearch \Index \File		
			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
T			
InstallShield			·
	< <u>B</u> ack	<u>N</u> ext >	Cancel

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

rchive Manager Search			>
Logon Information Specify a user account and password.			Þ
Specify the user account to be used by the DOMAIN\Username.	s application. User	accounts must be	e in the format
<u>U</u> ser name:			
democorp \domadmin			
Password:			
Confirm password:			
•••••			
stallShield			
Stalici lietu	< <u>B</u> ack	<u>N</u> ext >	Cancel

Enter the information as described below:

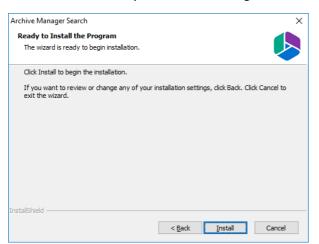
- a. User name logon name of the superuser (for example, democorp\mamadmin)
- b. Password logon password of the superuser
- c. **Confirm password** same as the Password.

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

Archive Manager Search Firewall Settings		×
Allow programs to communicate throu	ugh Windows Firewall	
InstallShield	< Back Next >	Cancel

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

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

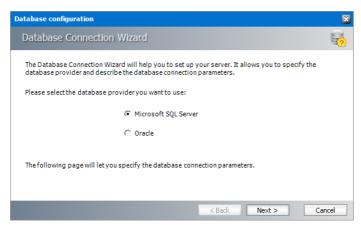


15. Click Install. The InstallShield Wizard Complete window opens.

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

Steps to configure the Search database connection

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



4. Select either **Microsoft SQL Server** (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 Se	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 🔹
User name:	
Password:	
	<back next=""> Cancel</back>

For Microsoft SQL Server

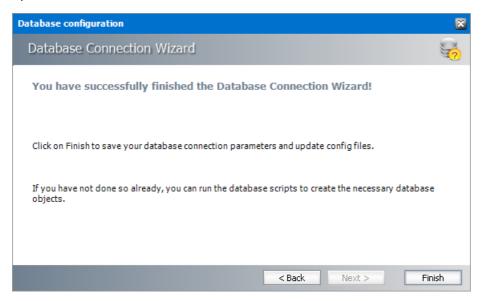
- a. Server name name of the SQL server (eg. AMFDB)
- b. Initial catalog name of the HSM database (e.g. MAMSEARCH which is the default name of the Archive Manager Search database)
- c. Schema name name of the SQL Schema (e.g. dbo)
- d. Authentication authentication type used for the database. Choose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

For Oracle

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

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

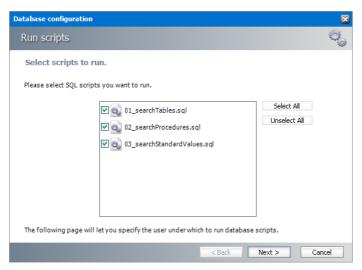
6. If the database connection is setup successfully, the configuration confirmation window opens.



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.

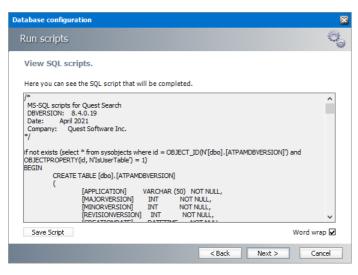


- 3. Click **Select All** to select all check boxes. Click **Next**. The *View SQL scripts* window opens.
- 4. Click Next. The Run Scripts authentication window opens.

Database configuration	8			
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. **User name** database login user name if *SQL Server authentication* is the selected as the authentication mode.
- b. **Password** password of the database user if *SQL Server authentication* is the selected as the authentication mode.
- c. (optional) Check the I want to review the SQL Scripts check box to view the scripts.
- 5. Click **Next**. If you chose to view the SQL scripts then the *View SQL scripts* window opens. If you chose to view the Oracle scripts then the *View Oracle scripts* window opens



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

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

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

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

🞇 Configuration					
Configure Searc	:h		Database	Search Scopes	Connectivity
🗊 нэм	😼 Database come	ection			
	Provider:	Microsoft SQL Server			
Search 🕨 🕨	Server name:	AMFDB			
	Initial catalog:	MAMSEARCH			
🔊 Post Processing	Table owner:	dbo			
	User name:	(Windows Authentication)			
				G	onfigure
	Construction Scripts				
	Database version:	8.4.0.39			
	Scripts version:	8.4.0.39			
	🥝 Your database	is up to date.			
				Ru	un 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		×
Database Connection Wizar	rd	.
Set up your Microsoft SQL Se	rver connection.	
Please enter parameters which will be	used to create a connection to your Microsoft SQL Server.	
Server name:	AMEDB	
Initial catalog:	MAMINDEX	
Schema name:	dbo	
Authentication:	Windows Authentication 🔹	
User name:		
Password:		
	< Back Next > Car	ncel

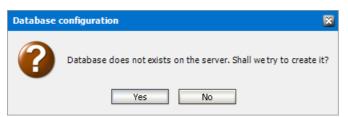
For Microsoft SQL Server

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

For Oracle

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

- c. User name database login user name
- d. Password password of the database user
- 5. Click **Next** and then click **Yes** on the confirmation dialog that opens.



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

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	ħ

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

Steps to install the Post Processing database

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

Database configuration	×
Run scripts	O
Select scripts to run.	
Please select SQL scripts you want to run.	
 ✓ (a) 01_indexTables.sql ✓ (a) 02_indexProcedures.sql ✓ (a) 03_indexStandardValues.sql 	Select All Unselect All
The following page will let you specify the user under which to run database script	ts.
< Back Next	t > Cancel

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

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

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

Enter the information as described below:

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

Database configuration	×
Run scripts	0
View SQL scripts.	
Here you can see the SQL script that will be completed.	
/* MS-SQL scripts for Quest PostProcessing DBVERSION: 8.4.0.19 Date: April 2021 Company: Quest Software Inc. */	^
if not exists (select * from sysobjects where id = OBJECT_ID(N'[dbo].[ATPAMDBVERSION]') and OBJECTPROPERTY(id, N'IsUserTable') = 1) BEGIN CREATE TABLE [dbo].[ATPAMDBVERSION] ([APPLICATION] VARCHAR (50) NOT NULL, [MAJORVERSION] INT NOT NULL, [MINORVERSION] INT NOT NULL, [REVISIONVERSION] INT NOT NULL,	~
Save Script Word was	ap 🖌
< Back Next > Car	ncel

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

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

Database configuration	
Run scripts	00
Run SQL scripts.	
Here you can run the selected SQL scripts to set up the database.	
01_indexTables.sql	
02_indexProcedures.sql	
indexStandard∀alues.sql	
Olde an Martin and an	
Click on Next to run scripts.	00:00
<back next=""></back>	Tancel

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

🛠 Configuration			
Configure Post	Processing	Database General Settings	Post Processing Scopes OCR Engine
可 ным	😼 Database com	ection	
🗊 Search	Provider: Server name:	Microsoft SQL Server AMFDB	
🕡 Post Processing 🕨	Initial catalog: Table owner:	MAMINDEX dbo	
	User name:	(Windows Authentication)	
	Scripts		Configure
	Database version:	8.4.0.16	
R	Scripts version:	8.4.0.16 is up to date.	
	_		Run scripts

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

Configuration		×
🕡 Add ar	chive server connection	
Server name:	AMFSERVER	
Туре:	Files Archive Server	
	< Back Next > Cancel	

Enter the information and described below:

- a. Server name name of the Archive Manager for Files server (eg. AMFSERVER).
- b. Type Select File Archive Server.
- 2. Click Next. The Set up the Archive database connection window opens.
- 3. If the database already exists, click **Import**. Otherwise click **Configure** to setup the Archive Manager for Files database. 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</back>	ncel

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 Wiza	rd	.
Set up your Microsoft SQL Se	rver connection.	
Please enter parameters which will be	used to create a connection to your Microsoft SQL Server.	
Server name:	AMFDB	
Initial catalog:	MAMFILE	
Schema name:	dbo	
Authentication:	Windows Authentication 🔹	
User name:		
Password:		
	< Back Next > Car	ncel

For Microsoft SQL Server

- g. Server name name of the SQL server (eg. AMFDB)
- h. **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)
- i. Schema name name of the SQL Schema (e.g. dbo)
- j. Authentication authentication type used for the database. Choose either Windows authentication or SQL Server authentication
- k. **User name** database login user name if *SQL Server authentication* is the selected as the authentication mode.
- 1. **Password** password of the database user if *SQL Server authentication* is the selected as the authentication mode.

For Oracle

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

- f. **Schema** name of the Archive Manager for Files database (e.g. **MAMFILE** which is the default name of the Archive Manager for Files database)
- g. User name database login user name
- h. Password password of the database user
- 5. Click **Next** and then click **Yes** on the confirmation dialog that opens.

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

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

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

7. Click **Finish** to close the *Database Connection* wizard. The *Set up the Archive database connection* window opens.

Configuration		X
Set up the Archive database connection		
Provider:	Microsoft SQL Server	
Server name:	AMFDB.democorp.com	
Initial catalog:	MAMFILE	
Table owner:	dbo	
User name:	(Windows Authentication)	
Import	onfigure < Back Next > Canc	el

8. Click Next. The Setup the Index database connection window opens.

1. If the database already exists, click **Import**. Otherwise click **Configure** to setup the Index database connection. 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

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

Database configuration	×		
Database Connection Wizar	d See		
Set up your Microsoft SQL Server connection.			
Please enter parameters which will be u	used to create a connection to your Microsoft SQL Server.		
Server name:	AMFDB		
Initial catalog:	MAMFILE		
Schema name:	dbo		
Authentication:	Windows Authentication 🔹		
User name:			
Password:			
	< Back Next > Cancel		

For Microsoft SQL Server

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

For Oracle

- a. Oracle net name net service name that describes the network address of the HSM database in your tnsnames.ora file (eg. AMFDB)
- b. **Schema** name of the Archive Manager for Files database (e.g. **MAMINDEX** which is the default name of the Archive Manager for Files database)
- c. User name database login user name
- d. Password password of the database user
- 3. 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

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

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

5. Click **Finish** to close the *Database Connection* wizard. The *Set up the Index database connection* window reopens.

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

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

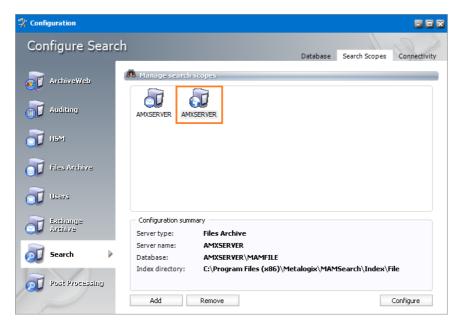
Configuration				×
🕡 Index	directory.			
Index directory:	C:\SEARCH			Browse
		< Back	Next >	Cancel

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

×
Cancel

10. 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**.



11. Close the *Configuration* wizard.

Steps to configure Post Processing Scopes

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

Add Post Processi	ng scope	×
Specify the server f	or Post Processing	
Server type:	Archive server for Files 🔹	
Server name:	AMFSERVER	
	OK Cancel	

Enter the information and described below:

- a. Server type select Archive server for Files
- **b.** Server name specify the name of the Archive Manager for Files server.
- 2. 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.

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

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

Archive Manager For Files	×
License Agreement Please read the following license agreement carefully.	
Press the PAGE DOWN key to see the rest of the agreement.	
Software Transaction Agreement PLEASE READ THIS AGREEMENT CAREFULLY BEFORE USING THIS PRODUCT DOWNLOADING, INSTALLING OR USING THIS PRODUCT, YOU ACCEPT AND AN TO THE TERMS AND CONDITIONS OF THIS AGREEMENT. FOR ORDERS PLA OUTSIDE THE UNITED STATES OF AMERICA, PLEASE GO http://quest.com/legal/sta.aspx TO VIEW THE APPLICABLE VERSION OF AGREEMENT FOR YOUR REGION. IF YOU DO NOT AGREE TO THE TERMS CONDITIONS OF THIS AGREEMENT OR THE APPLICABLE VERSION OF ACREEMENT FOR YOUR DECION. DO NOT DOWNLOAD. INSTALL OR USE Do you accept all the terms of the License Agreement? If you select No,	GREE ACED TO THIS AND THIS
the setup will doe. To install Archive Manager for Files, you must accept this agreement.	Print
< <u>Back</u> <u>Y</u> es	No

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

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

- 9. If you are connected to the internet, select **Online activation** or see <u>License Activation</u> for more options. Click **Next**. When your license is activated, you will see a confirmation message and the license details. Click **Finish** to close the **Activate License Key** dialog.
- 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:			
Note: port number should be between 1 <-> 655: InstallShield	35 < <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.

rchive Manager For Files		>
Logon Information		
Specify a user account and password.		
Specify the user account to be used by th DOMAIN\Username.	is application. User accounts must	be in the format
<u>U</u> ser name:		
DEMOCORP\domadmin		
Password:		
Password:		
_		
•••••		
Confirm password:		
Confirm password:		
Confirm password:		
Co <u>n</u> firm password:	< Back Next >	Cancel

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

Archive Manager For Files		×
Firewall Settings		
Allow programs to communicate through W	indows Firewall	
InstallShield		
	< <u>B</u> ack <u>N</u> e:	xt > Cancel

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

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

Archive Manager For Files			×
Ready to Install the Program The wizard is ready to begin installation.			
Click Install to begin the installation.			
If you want to review or change any of your exit the wizard.	installation settings, o	dick Back. Clid	k Cancel to
InstallShield			
	< <u>B</u> ack	Install	Cancel

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

Archive Manager For Files					
	InstallShield Wizard Complete				
	The InstallShield Wizard has successfully installed Archive Manager for Files. Click Finish to exit the wizard.				
	< <u>B</u> ack Finish Cancel				

18. Click **Finish** to close the wizard.

Configure Archive Manager

In this topic:

- Steps to configure the Archive Manager database connection
- <u>Steps to install the Archive Manager database</u>

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.

Database configuration	×
Database Connection Wizard	S
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 > Can	cel

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	erver connection.	
Please enter parameters which will be		
Server name:	AMFDB	
Initial catalog:	MAMFILE	
Schema name:	dbo	
Authentication:	Windows Authentication 🔹	
User name:		
Password:		
	< Back Next > C	ancel

For Microsoft SQL Server

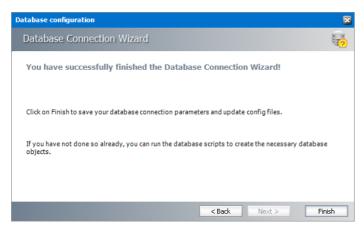
- a. Server name name of the SQL server (eg. AMXDB)
- b. **Initial catalog** name of the HSM database (e.g. **MAMEXCH** which is the default name of the Archive Manager for Exchange database)
- c. Schema name name of the SQL Schema (e.g. dbo)
- d. Authentication authentication type used for the database.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

For Oracle

- a. Oracle net name net service name that describes the network address of the HSM database in your 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. User name database login user name
- d. Password password of the database user
- 6. Click **Next** and then click **Yes** on the confirmation dialog that opens.

Database o	configuration 🔀
$\mathbf{?}$	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 **Exchange Archive** and select the **Database** tab.
- 2. Verify that the database connection information is as expected. Then click **Run Scripts**. The *Run Scripts* selection window opens.

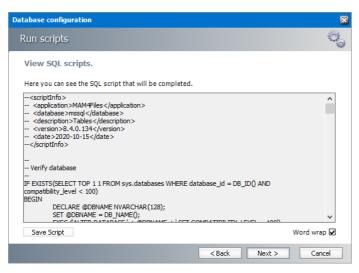
Database configuration	×
Run scripts	
Select scripts to run.	
Please select SQL scripts you want to run.	
V 😡 01_filePAMTables.sql	
Unselect All	
03_filePAMDefaultValues.sql	
V a 04_filePAMFolderConversionsql	
V 😡 05_filePAMUserConversion.sql	
06_filePAMUserConversion2sql	
< >	
The following page will let you specify the user under which to run database scripts.	
< Back Next > Cancel	

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

Database configuration	8					
Run scripts						
Specify the user under which 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. **User name** database login user name if *SQL Server authentication* is the selected as the authentication mode.
- b. **Password** password of the database user if *SQL Server authentication* is the selected as the authentication mode.
- c. (optional) Check the I want to review the SQL Scripts check box to view the scripts.
- 4. Click **Next**. If you chose to view the SQL scripts then the *View SQL scripts* window opens. If you chose to view the Oracle scripts then the *View Oracle scripts* window opens



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

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

Database configuration	×
Run scripts	0
Run SQL scripts.	
Here you can run the selected SQL scripts to set up the database.	
01_filePAMTables.sql	^
02_filePAMProcedures.sql	
03_filePAMDefaultValues.sql	
O4_filePAMFolderConversion.sql	
05_filePAMUserConversion.sql	
O6_filePAMUserConversion2.sql	
11_PostProcesingTables.sql	
12_PostProcesingProcedures.sql	~
Click on Next to run scripts.	00:00
< Back Next >	Cancel

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

🛠 Configuration			- - X
Configure Files	1 D		
Auditing	😼 Database conne	eciton	Database Archiveoptions
	Provider:	Microsoft SQL Server	
OV HEM	Server name:	AMXSERVER	
Files Archive	Initial catalog:	MAMFILE	
	Table owner:	dbo	
a Users	User name:	(Windows Authentication)	
00			Configure
刻 Search	Scripts		
or Post Processing	Database version:	8.4.0.134	
3 8	Scripts version:	8.4.0.134	
	🥝 Your database	is up to date.	
			Run scripts

- 7. Click the **Archive options** tab. Information presented here is filled in by default and configuration is necessary only for special purposes as described below:
 - a. Machine name 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 Files	Archive		Database	Archiveoptions
Auditing	X Archive options			
лын 🗊	Machine name: HSM server:	AMFSERVER		
Files Archive 🕨	Minimum size of the file to be replaced by shortcut:	4 <u>•</u> KB		
Jusers				
🥡 Search				
Dost Processing				
				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		LIIUN	UN.

🍇 Services							
Eile Action View Help							
Services (Local)	MAM Search MAMExDirectArchiv MAMExExchangeSv MAMExGuardSv MAMExHandler MAMExHandler MAMExManagerSv	Description Auditing se MAM-STOR Stop Payse Resume Resume Restart All Tasks Refresh	Star G Star Star Star Star	Startup Type Automatic M HSM Base Oper teneral Log On R Log on as: Log on as: Local System ac Local System ac Allow service Inis account:	ecovery Deper	ndencies	puter) ?)
	MAMfsaGuardSv MAMfsaHandlerSv MAMfsaRemoteSer MAMLogSv MAMMAPIServices MAMPostProcessingSv MAMPSTImporterSv	Properties	Star Star	Password: Confirm password You can enable or d Hardware Profile Profile 1	± ••••••	e for the hardware	e profiles listed below: Service Enabled
Opens the properties dial	Extended & Standard /					Enable	Disable
)K Car	ncel <u>A</u> pply

- 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		? X				
Default Protocols	s MSDTC	[coł	vi Security				
General	Options	Default F	roperties				
✓ Enable Distributed COM on this computer							
Enable COM Inte	rnet Services on this co	mputer					
– Default Distributed	COM Communication P	roperties					
	Level specifies security		vel				
Default Authentic			101.				
None		T					
1 Hono							
	level specifies whether						
using the client's id	i, and whether the appli lentity.	cauon can uo ope	BIBUUNS				
Default Imperson	ation Level						
Anonymous		•					
Security for reference tracking can be provided if authentication is used							
and that the default impersonation level is not anonymous.							
	ОК	Cancel	<u>A</u> pply				

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.

references		×
Categories:	Basic Tools	
Commenting	□ Use single- <u>k</u> ey accelerators to access tools	
Documents	Create links from URLs	
Full Screen	Make Hand tool select text & images	
General		
Page Display	_	
	- Make Hand tool use mouse-wheel zooming	
3D & Multimedia	Make Select tool select images before text	
Accessibility Forms		
Identity	Use fixed resolution for Snapshot tool images:	
International		
Internet	Warnings	
JavaScript	Do not show edit warnings Reset All Warnings	
Measuring (2D)		
Measuring (3D)		
Measuring (Geo)	Messages from Adobe	
Multimedia (legacy)	Show me messages when I launch Reader	
Multimedia Trust (legacy)	Don't show messages while viewing a document	
Online Services		
Reading	⊂ Application Startup	
Search		
Security	Show <u>s</u> plash screen	
Security (Enhanced) Spelling	Use only certified plug-ins Currently in Certified Mode: Yes	
Tracker	Check 2D graphics accelerator	
Trust Manager	Check 2D graphics accelerator	
Units		
Updater		
	Enable Protected Mode at startup Create Protected Mode log file View log	
	Select Default PDF Handler	
		_
	OK Cance	4

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: User name: Password:		Port:	0	
		Set	Close	

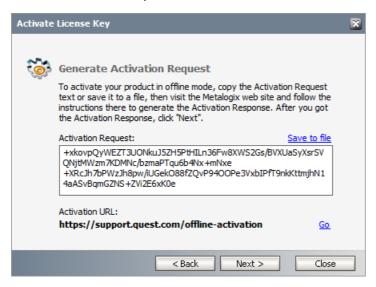
- a. Select Activate Proxy and specify the proxy information as described below:
- b. Server Name enter the name of your proxy server.
- c. **Port** enter the port number of the proxy server.
- d. User name and Password Specify the credentials of the user who is authorized to access the proxy server.
- e. Click **Set** to save the information, or click **Close** to return to the *License Key Information* dialog.
- 3. If the license key is validated successfully, the confirmation message appears along with the license details. Click **Finish** to close the dialog.

Offline activation

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

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

a. Select from the two options described below:



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

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

4. Step 2: Submit collected data

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

5. Step 3: Paste Activation Response

Activate License Key		
9	Enter your Activation Response To activate your product offline mode, paste the Activation Response or load it from file saved on the Activation web page. If you do not have the Activation Response go to previous wizard page and follow the instructions there. Once entered the Activation Response, dick "Next".	
	Activation Response: p2Ev +bx3XYOKpoyX55z8y96I9ABE9XNCGLkgVhAx7NuiH2lWIBpBK1AtEllz6 vHpJiW4fxmizE2/D24FDsZMdA +1kyhlzNaBfYWY/XtkrUwn3YfDdAFMEExYSsUvDwCUvnG1uMOHQsT GddkqT+oKvgiGX4LccThDGPf4/lheOowM9NXfWTw3f	
	< Back Next > Close	

- a. Click Load from File. The Windows file dialog appears.
- b. Locate the activation key file and click **Open**. The text appears in the **Activation Key File** field.
- 6. Step 4: Activate offline

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

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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>.

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Technical Support Resources

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

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

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