Quest

Metalogix® Archive Manager for Files 8.5

ArchiveWeb Guide

© 2022 Quest Software Inc. ALL RIGHTS RESERVED.

This guide contains proprietary information protected by copyright. The software described in this guide is furnished under a software license or nondisclosure agreement. This software may be used or copied only in accordance with the terms of the applicable agreement. No part of this guide may be reproduced or transmitted in any form or by any means, electronic or mechanical, including photocopying and recording for any purpose other than the purchaser's personal use without the written permission of Quest Software Inc.

The information in this document is provided in connection with Quest Software products. No license, express or implied, by estoppel or otherwise, to any intellectual property right is granted by this document or in connection with the sale of Quest Software products. EXCEPT AS SET FORTH IN THE TERMS AND CONDITIONS AS SPECIFIED IN THE LICENSE AGREEMENT FOR THIS PRODUCT, QUEST SOFTWARE ASSUMES NO LIABILITY WHATSOEVER AND DISCLAIMS ANY EXPRESS, IMPLIED OR STATUTORY WARRANTY RELATING TO ITS PRODUCTS INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTY OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE, OR NON-INFRINGEMENT. IN NO EVENT SHALL QUEST SOFTWARE BE LIABLE FOR ANY DIRECT, INDIRECT, CONSEQUENTIAL, PUNITIVE, SPECIAL OR INCIDENTAL DAMAGES (INCLUDING, WITHOUT LIMITATION, DAMAGES FOR LOSS OF PROFITS, BUSINESS INTERRUPTION OR LOSS OF INFORMATION) ARISING OUT OF THE USE OR INABILITY TO USE THIS DOCUMENT, EVEN IF QUEST SOFTWARE HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES. Quest Software makes no representations or warranties with respect to the accuracy or completeness of the contents of this document and reserves the right to make changes to specifications and product descriptions at any time without notice. Quest Software does not make any commitment to update the information contained in this document.

If you have any questions regarding your potential use of this material, contact:

Quest Software Inc.
Attn: LEGAL Dept.
4 Polaris Way
Aliso Viejo, CA 92656

Refer to our Web site (https://www.quest.com) for regional and international office information.

Patents

Quest Software is proud of our advanced technology. Patents and pending patents may apply to this product. For the most current information about applicable patents for this product, please visit our website at https://www.quest.com/legal.

Trademarks

Quest, the Quest logo, and Metalogix are trademarks and registered trademarks of Quest Software Inc. and its affiliates. For a complete list of Quest marks, visit https://www.quest.com/legal/trademark-information.aspx. All other trademarks and registered trademarks are property of their respective owners.

Legend

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

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

Metalogix® Archive Manager for Files
Updated January 2022
Version 8.5

Contents

About ArchiveWeb **5**

Requirements **6**

Installation **7**

Configuration **20**

ArchiveWeb Setup 20
Multi-factor Authentication 22
Search Scopes 29
Post-processing 36
Compliance 36

ArchiveWeb Settings **44**

Roles 45
Permissions 47
Permissions list 49
Auditor Access 51
Profile 54
Shared Mailboxes 60
Tags 62
Management 65
File Management 66
Search Management 70

ArchiveWeb Interface and conventions **72**

List view conventions 73

Archive **79**

List view 80
More actions 81
Legal hold – lock documents 83

Search **85**

Keyword Search 86
Advanced Search 88
How to build search queries 91
Search Results 104
Search History 105
Search Templates 110

Report **112**

Statistics 112
Audit tab 114

Tasks **118**

Addendum **120**

Export Tasks IIS Settings Suggestions 120
Troubleshooting 121
About Us 123
Contacting Quest 123
Technical Support Resources 123

1

About ArchiveWeb

This application is used for viewing archived emails and files over the Internet. A user can access archived items through a web browser by navigating to the ArchiveWeb using the URL `http://<ArchiveWebServerName>/archiveweb`.

With mobile device support your archive is at hand virtually anywhere. Mobile form factoring and simplified navigation contribute to the ease of use.

Functions:

- Browsing archived emails (archived by Archive Manager for Exchange) and files (archived by Archive Manager for Files)
- Keyword search (optional)
- Advanced search (optional) - allows searching for archived items using query-builder capabilities.
- Search template

2

Requirements

System requirements

- Windows Server 2012, Windows Server 2012 R2, Windows Server 2016 or Windows Server 2019
- .NET Framework 4.7.2 or higher (https://dotnet.microsoft.com/download/dotnet-framework/net472)

> **NOTE:** For the Windows servers listed above, verify that the **.NET Framework 4.5 Features / WCF Services / HTTP Activation** is checked under **Server Manager** > **Add Roles and Features Wizard.**

Supported browsers

- Mozilla Firefox 69 and later
- Google Chrome 76 and later
- Opera 63 and later
- Microsoft Edge

IIS configuration

Please make sure you have installed the fix for MVC applications – follow the link below to find appropriate update according to your OS:

- http://support.microsoft.com/kb/980368

When you find you are unable to browse MVC application, you can try to register the framework for IIS by running the followings commands:

- %windir%\Microsoft.NET\Framework64\v4.0.30319\aspnet_regiis.exe –ir
- iisreset

If required, uncheck “Require SSL” in IIS’s SSL Settings for ArchiveWeb.

3

Installation

Archive Manager ArchiveWeb must be installed on the same machine that hosts the Archive Manager for Exchange or Archive Manager for Files server. Installing Archive Manager ArchiveWeb on another computer is not supported.

ArchiveWeb can be installed in one of two ways:

- automatically, by choosing the ArchiveWeb component from the unified product installer. This method installs ArchiveWeb on the same server where Archive Manager is installed.
- manually, using the *Archive Manager ArchiveWeb setup.exe* file. This method allows you to manually install ArchiveWeb on any web server in the domain where Archive Manager is installed.

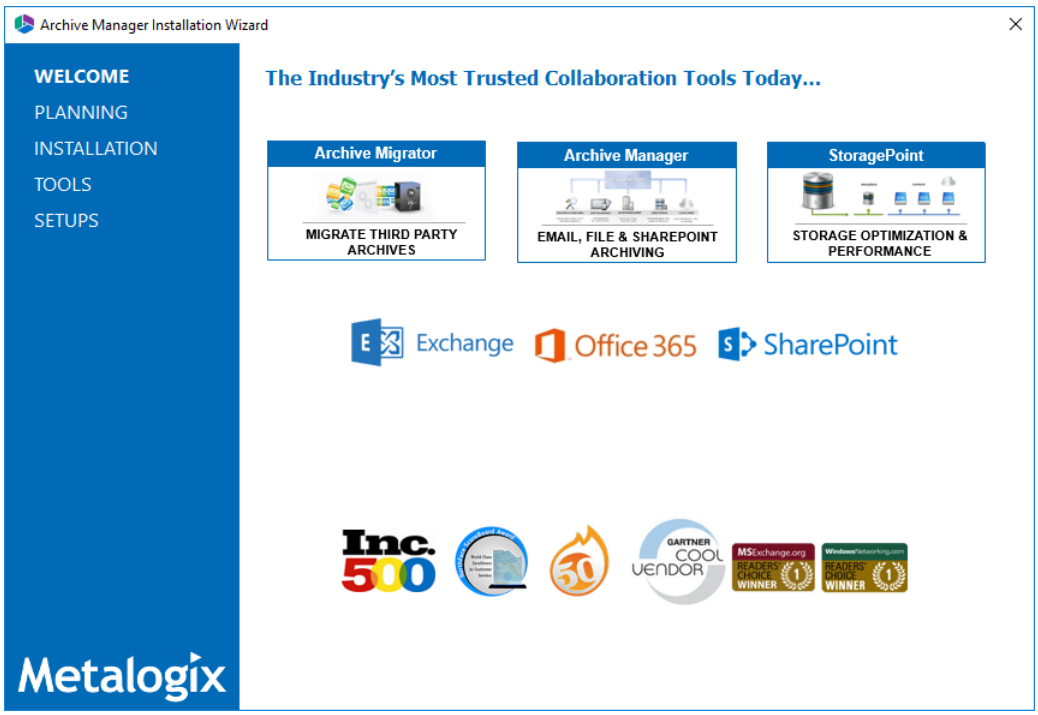
In this chapter:

- Steps to install automatically with the product installer
- Steps to install manually with the ArchiveWeb installer
- Steps to verify the installation

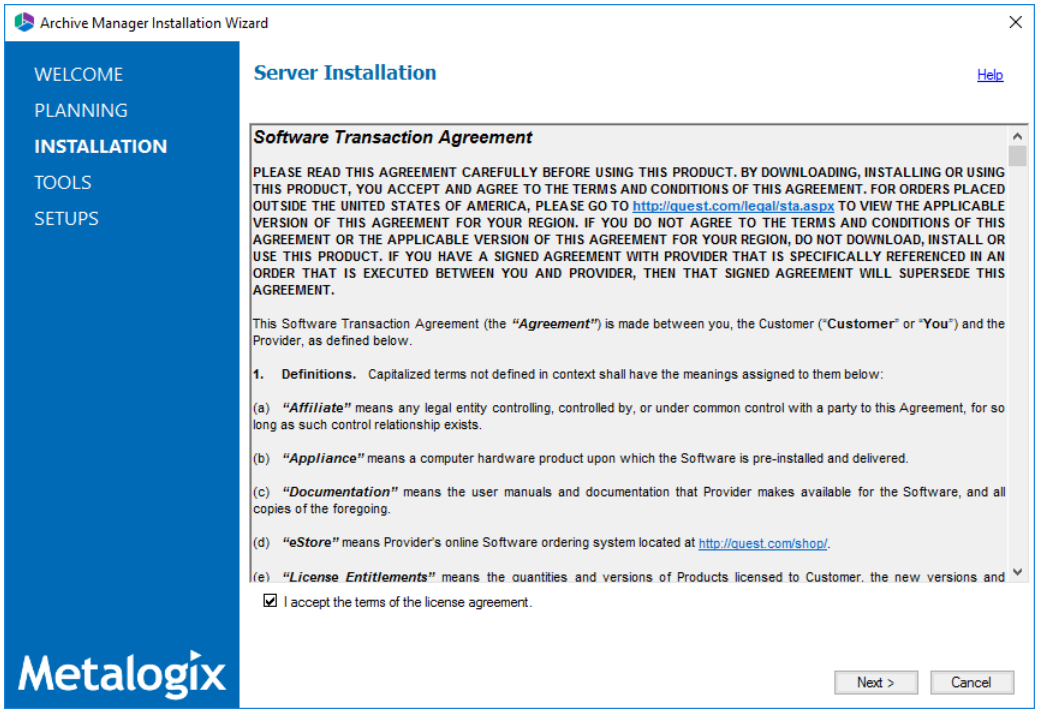
Steps to install automatically with the product installer

1. Login with the credentials of the **administrator** (eg. **democorp\domadmin**) to the Archive Manager for Files server.
2. Download and unzip the installer if it is not already available.

3. If the installer does not start immediately, run the **MAMInstaller.exe** from your install media folder. The *Welcome* window opens.

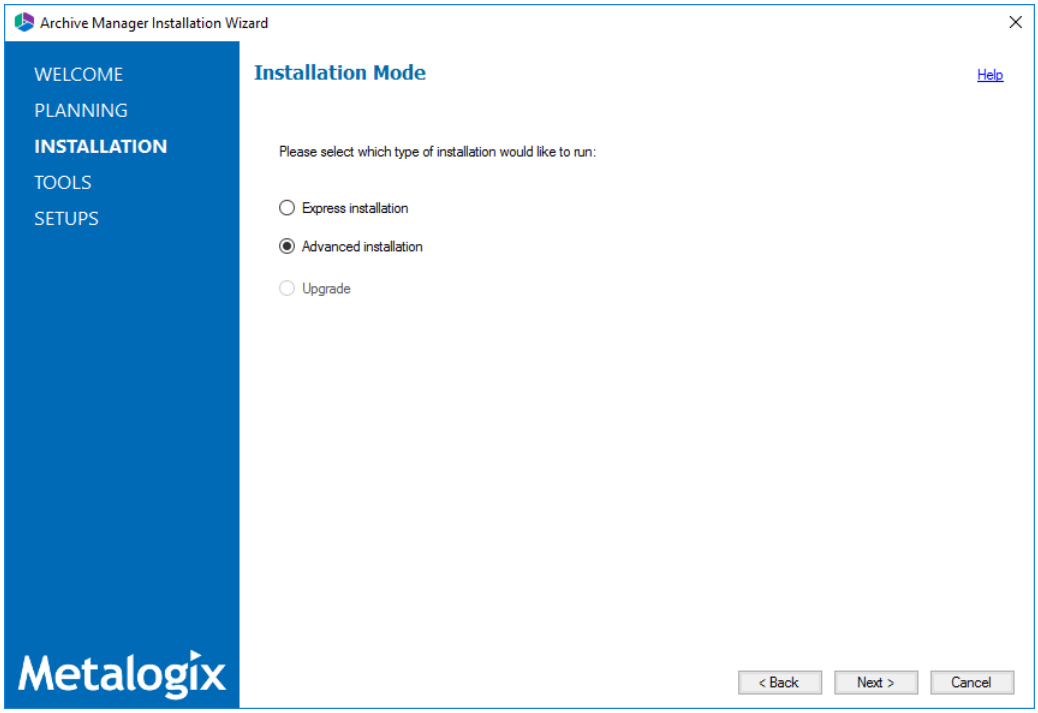


4. From the navigation panel on the left, click **INSTALLATION**. The *Server Installation* window opens.

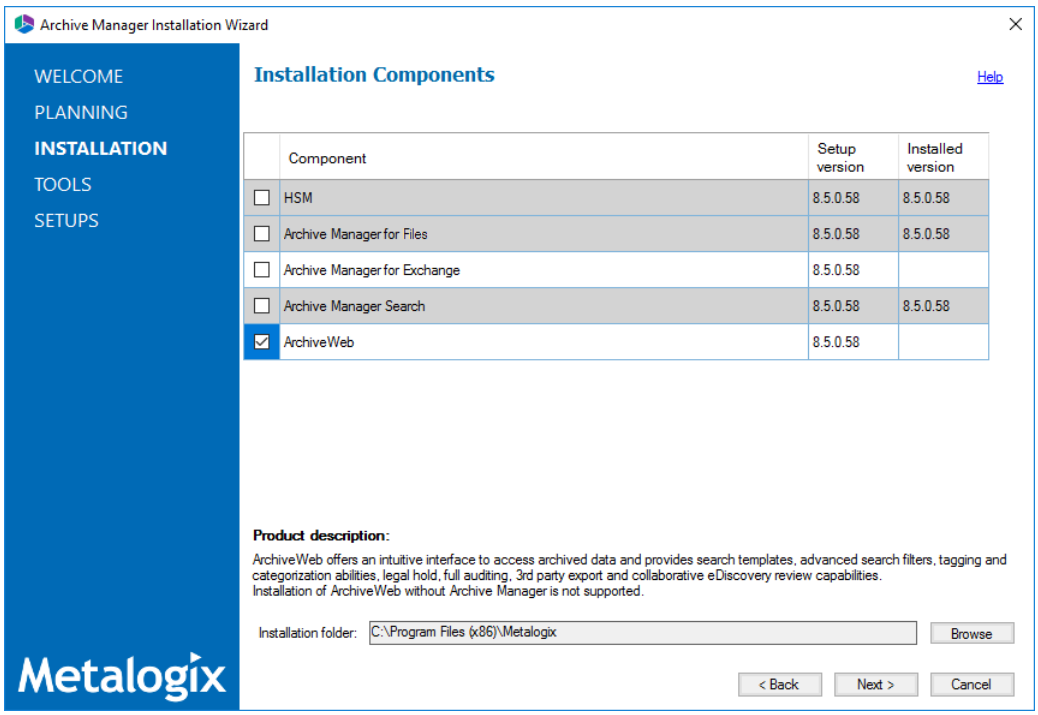


Read the **Software Transaction Agreement**. If you wish to proceed, select the **I accept the terms of the license agreement** check box.

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

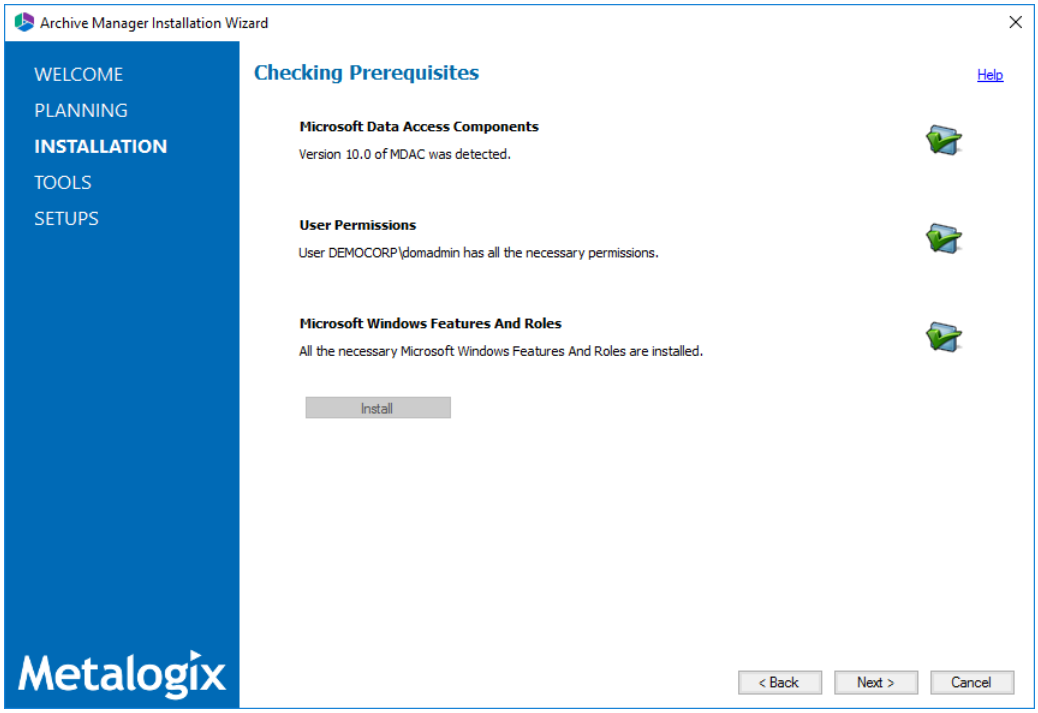


6. Click **Next**. The *Installation Components* window opens.

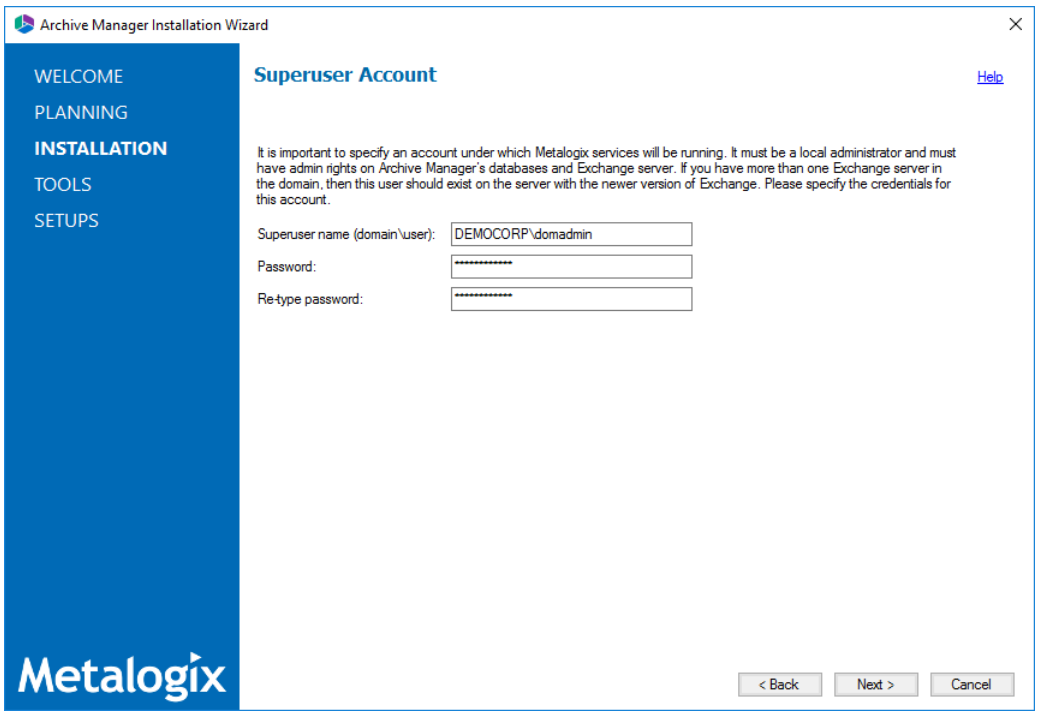


Verify that Archive Manager for Files is installed and then select **ArchiveWeb**. Click **Browse** to change the installation folder if necessary.

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

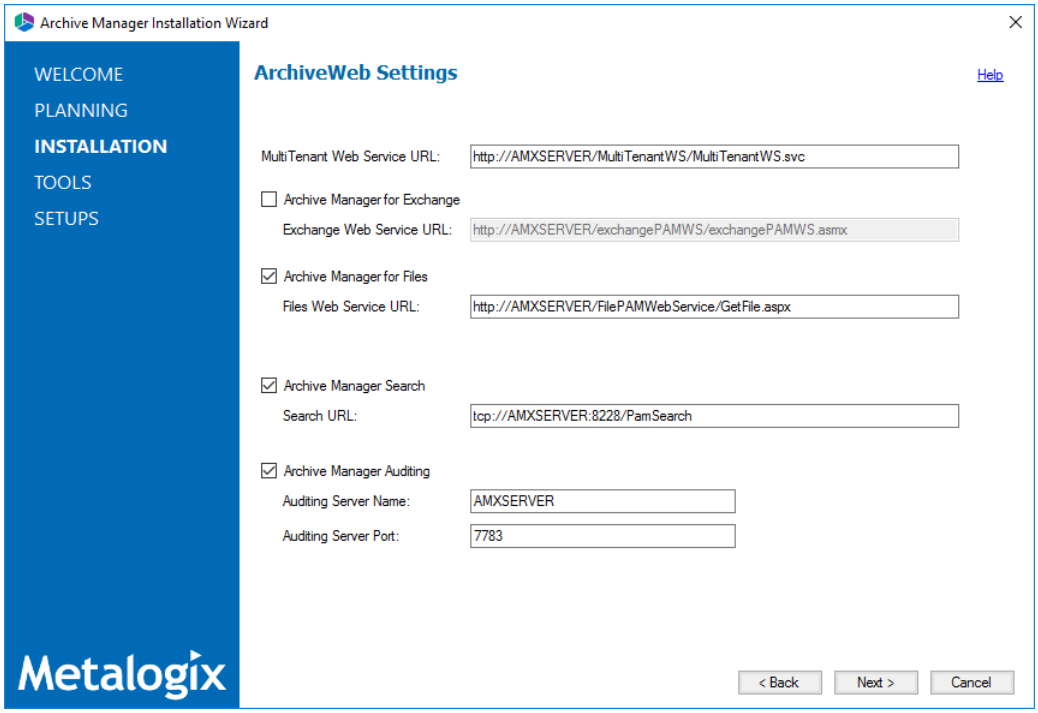


8. Click **Next**. The *Superuser Account* window opens.



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

9. Click **Next**. The *ArchiveWeb Settings* window opens.



Specify the properties as described below:

MultiTenant Web Service URL - URL for MultiTenantWS web service

Archive Manager for Exchange - select this option to install web services for Archive Manager for Exchange.

Exchange Web Service URL - URL for ExchangePAMWS web service if Archive Manager for Exchange is installed.

Archive Manager for Files - select this option to install web services for Archive Manager for Files.

Files Web Service URL - URL for FilePAMWebService web service if Archive Manager for Files is installed.

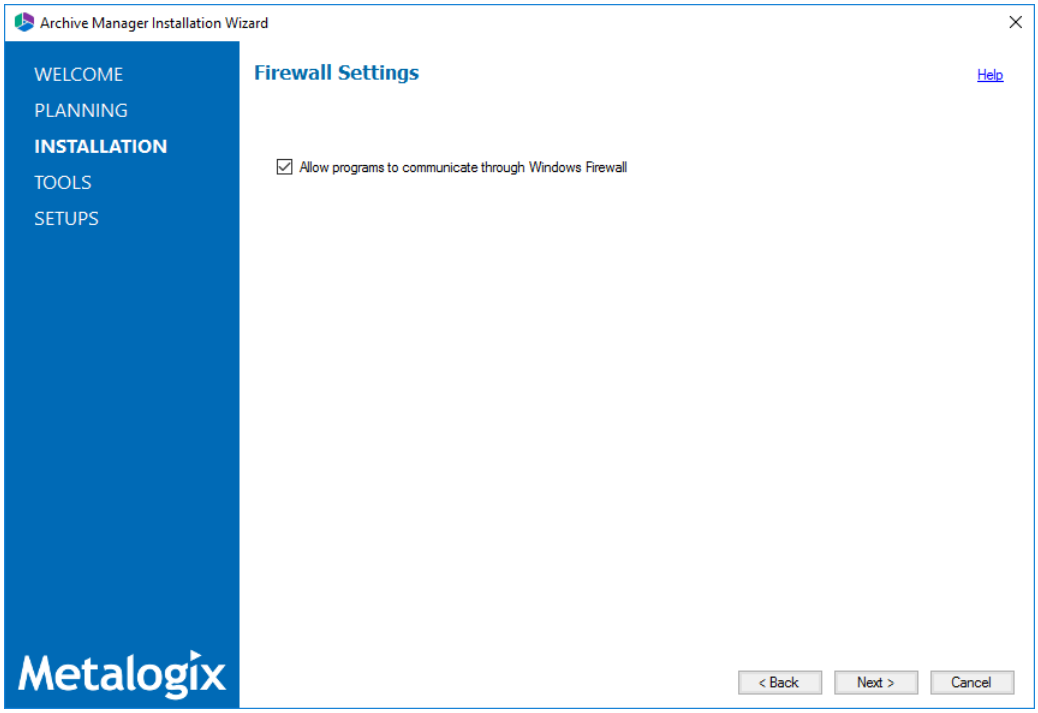
Archive Manager Search - select this option to install web services for Archive Manager Search.

Search URL - URL for PamSearch web service if Archive Manager Search is installed.

Archive Manager Auditing - select this option to specify the server details for Archive Manager Auditing.

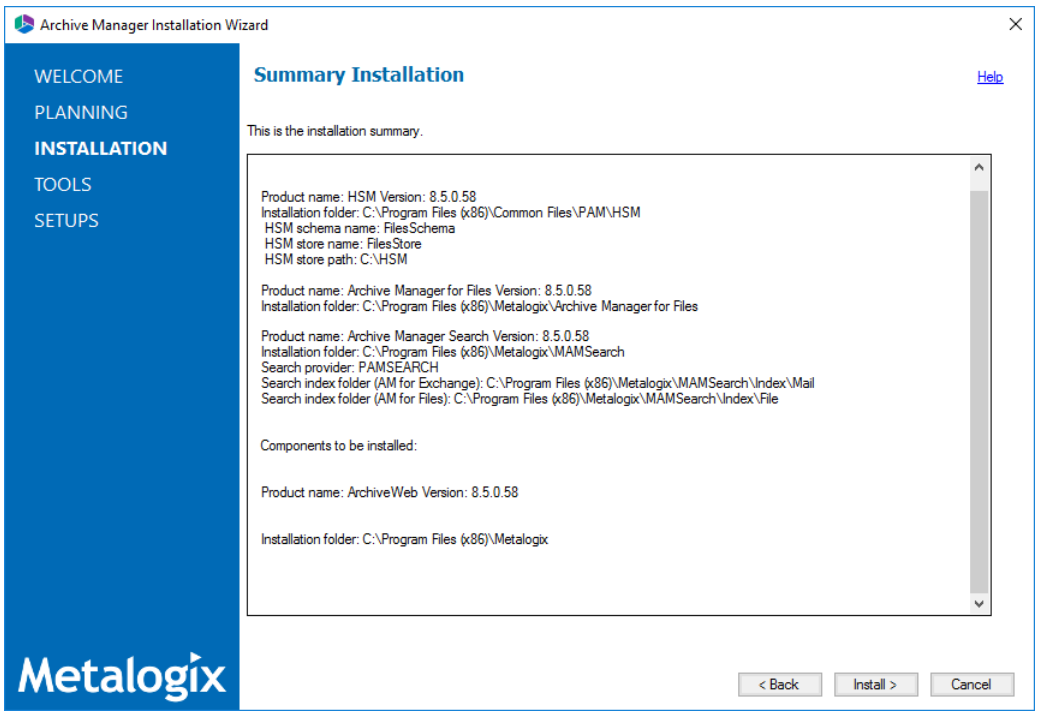
Auditing server name & port - specifications for the machine where auditing component is installed

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



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

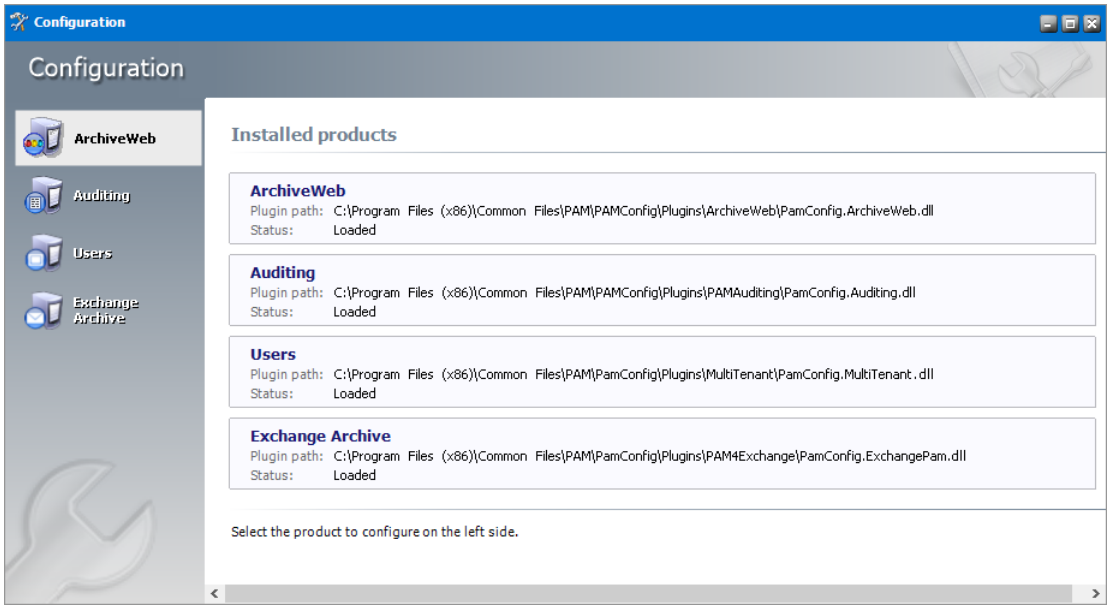
11. Click **Next**. The *Summary Installation* window opens. The installation summary displays settings you have specified in previous steps.



12. Click **Install** to start the installation. If a feature installation fails or completes with a warning, expand the row to view and address the problem.

13. Click **Finish** to complete the installation step.

14. To quickly verify the install, open **Start** > **Metalogix** > **Archive Manager Configuration**. The *Configuration* wizard opens and the **ArchiveWeb** tab is available..

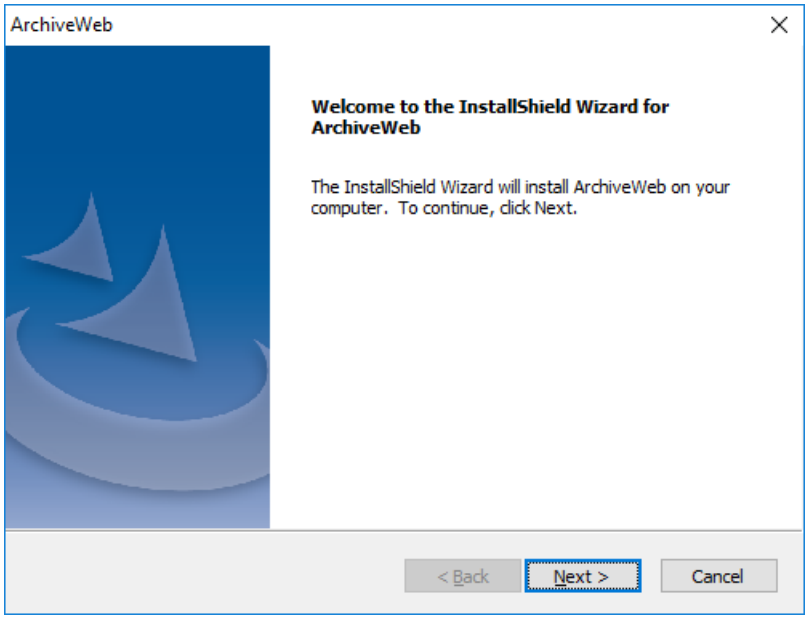


Steps to install manually with the ArchiveWeb installer

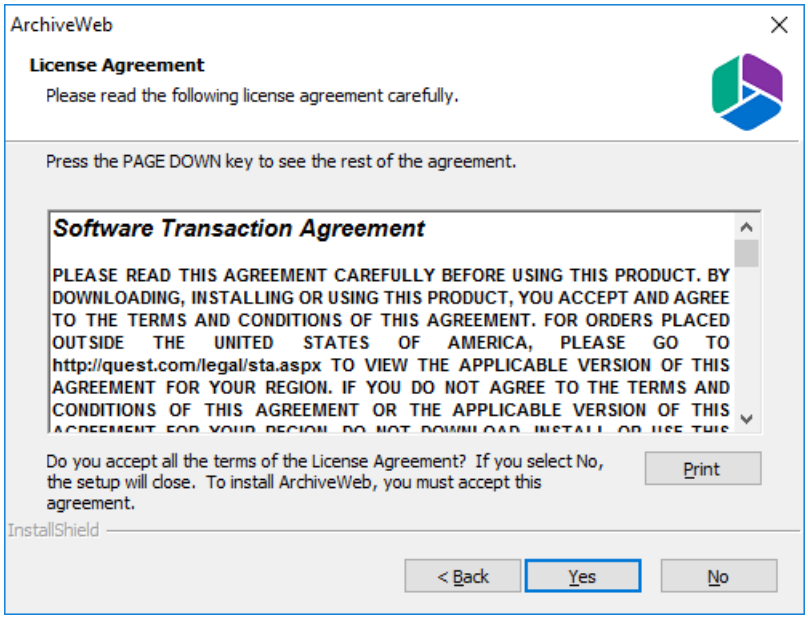
1. Login with the credentials of the **administrator** (eg. **democorp\domadmin**) to the Archive Manager for Files server.
2. Download and unzip the installation package if it is not already available.
3. Open PowerShell in Administrator mode and install the server prerequisites by running the following command:

   ```
   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
   ```

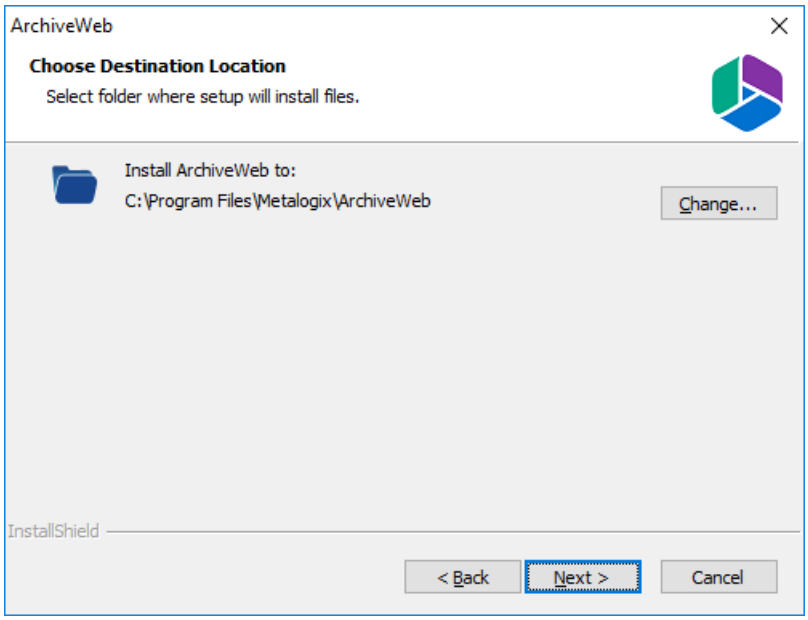
4. Run the setup file `<installer package folder>\ArchiveWeb\Archive Manager ArchiveWeb setup.exe` to start the ArchiveWeb installer wizard.



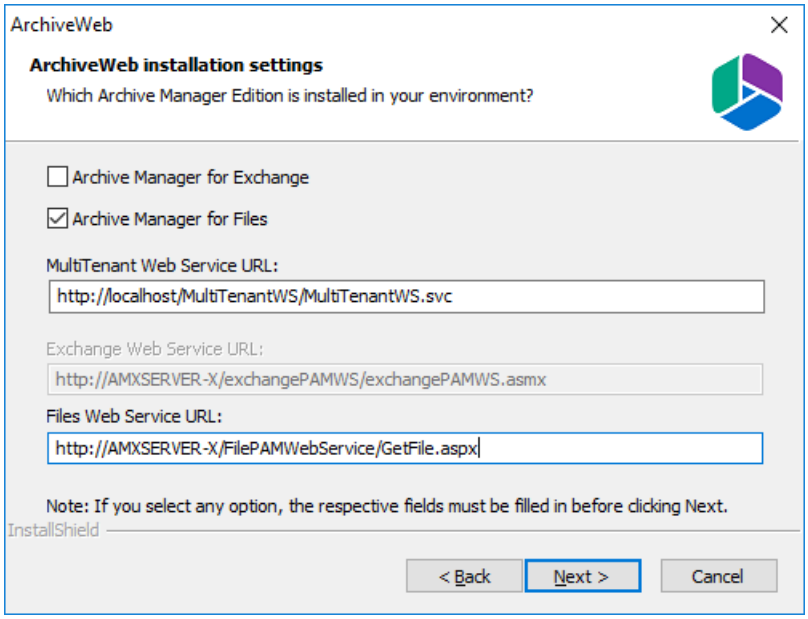
5. Click **Next**. Then *License Agreement* window opens.



6. Click **Next**. The *Choose Destination Location* window opens.



7. Click **Change** to choose another destination or click **Next** to continue. The *ArchiveWeb installation settings* window opens.



The properties are as described below:

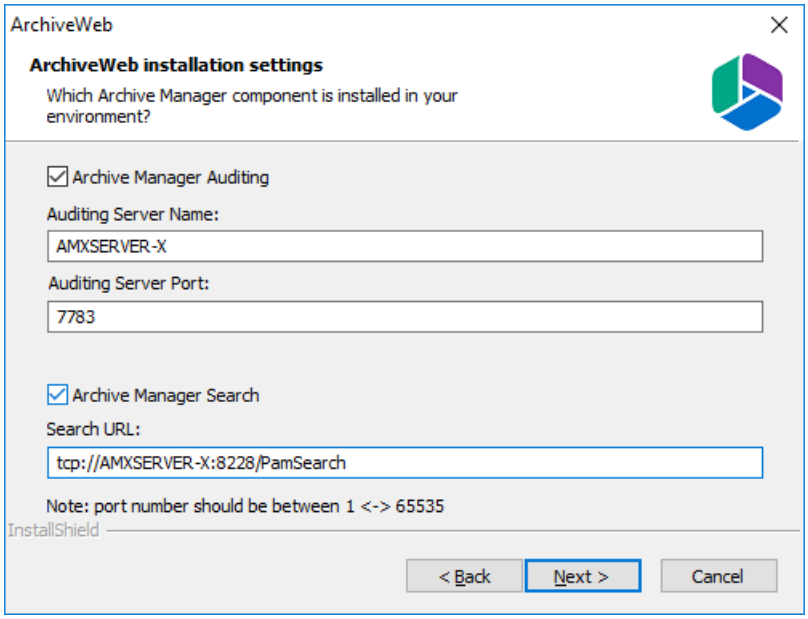
a. **Archive Manager for Exchange** - check this box to install features specific to Archive Manager for Exchange.

b. **Archive Manager for Files** - check this box to install features specific to Archive Manager for Files.

c. **MultiTenant Web Service URL** - location of the tenant web service on the web server. The default location is automatically specified.

d. **Files Web Service URL** - location of the ASP.NET Web service for the Archive Manager for Exchange features in ArchiveWeb. Activated only if **Archive Manager for Files** check box is checked.

8. Click **Next**. The *Component Integration* window opens.



This window allows you to specify the details of the components installed in your environment that will be integrated with ArchiveWeb.

a. **Archive Manager Auditing** - check this box if Archive Manager Auditing is installed in your environment.

b. **Auditing Server Name** - name of the server where Archive Manager Auditing is installed.

c. **Auditing Server Port** - port number of the Archive Manager Auditing feature. The default port number is 7783.

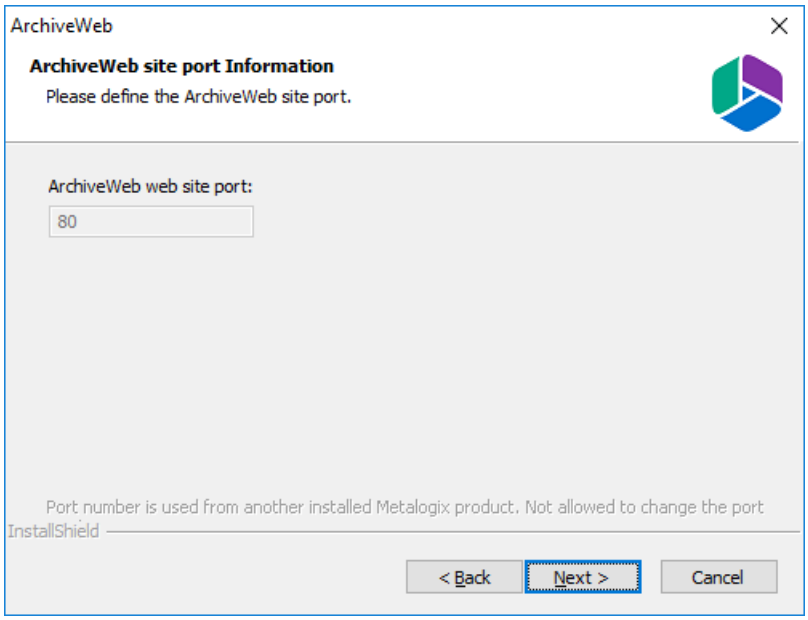
> **NOTE:** To find this information open the *Archive Manager Configuration* tool on your auditing server. Then open the *Connection* tab in the *Auditing* section.

d. **Archive Manager Search** - check this box if Archive Manager Search is installed in your environment.

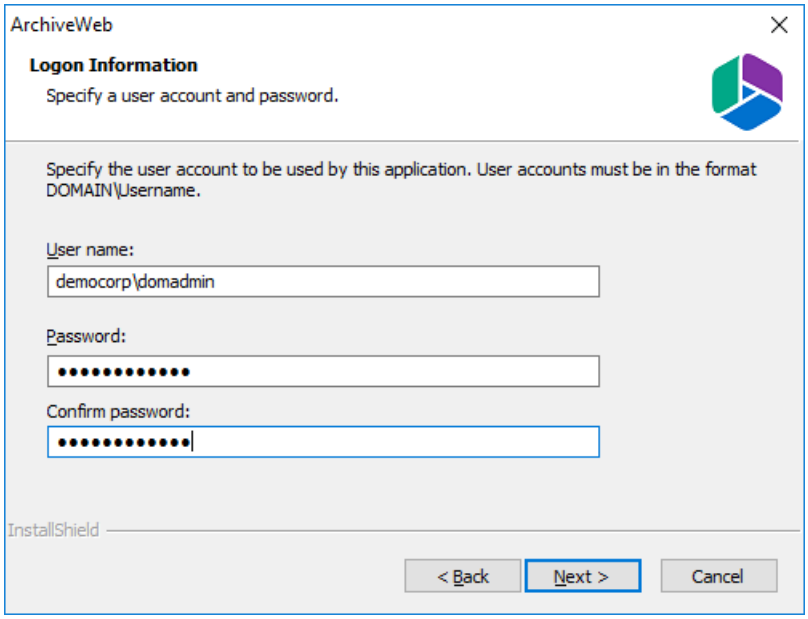
e. **Search URL** - the search URL used by the search feature in the format tcp://<search-server>:<search-port>/PamSearch.

> **NOTE:** To find this information open the *Archive Manager Configuration* tool on your auditing server. Then open the *Connection* tab in the *Auditing* section.

9. Click **Next**. The *ArchiveWeb site port* window opens.



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



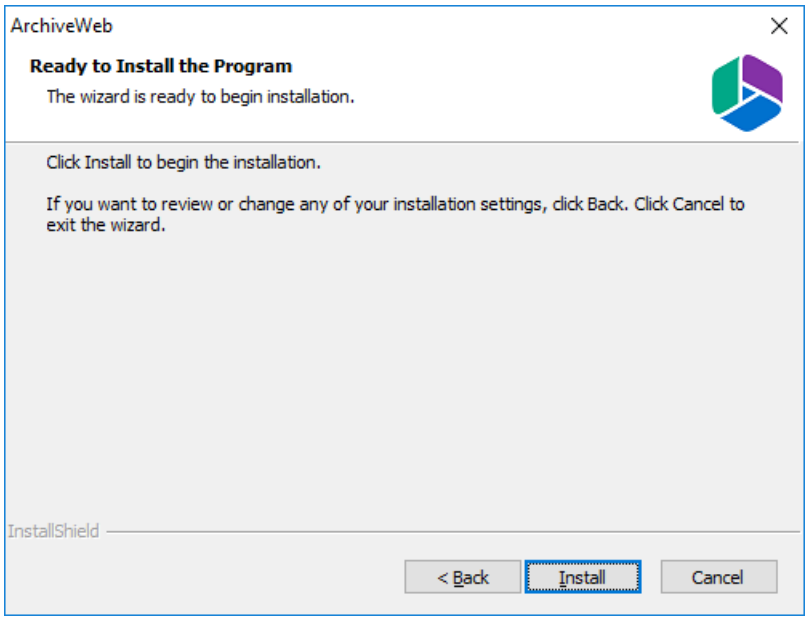
Enter the account credentials as described below:

a. **User name** - user name of the enterprise administrator in the format `domain\username`.

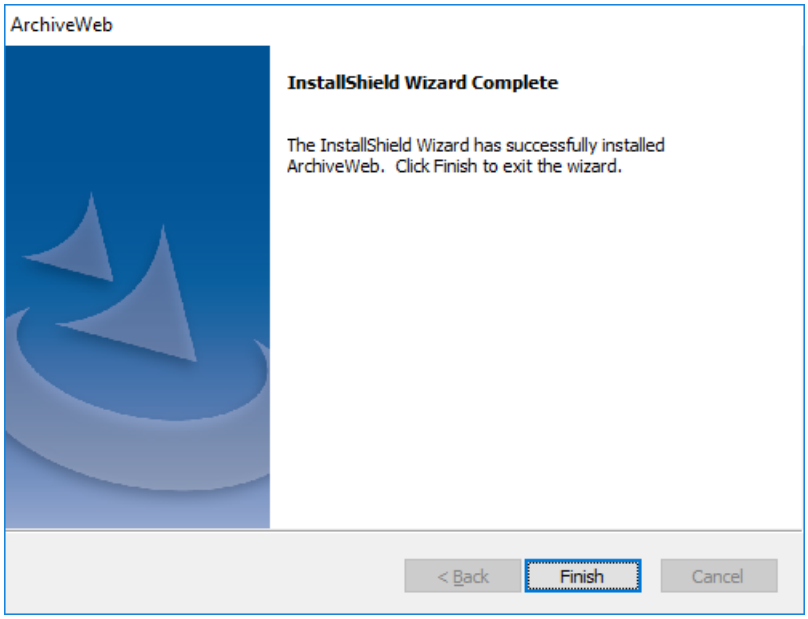
b. **Password** - password for the enterprise administrator.

c. **Confirm password** - re-enter the password for the enterprise administrator.

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



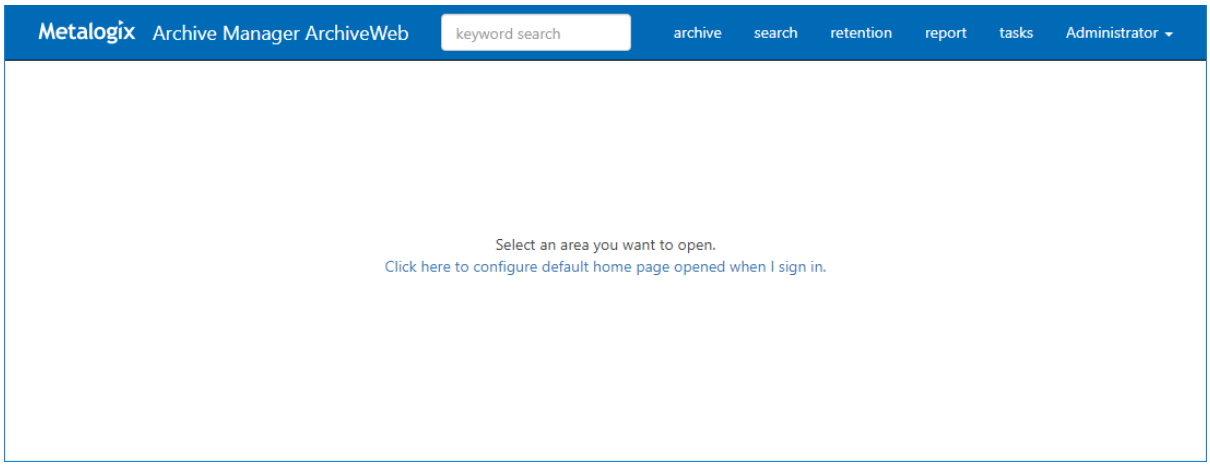
12. Click **Back** to review or revise the settings, or click **Install** to start the installation.



13. Click **Finish** to complete the setup and close the installer wizard. The *ArchiveWeb* section in the *Archive Manager Configuration* tool opens. For more information see Configuration.

Steps to verify the installation

1. Stop and restart the *Archive Manager for Files* services. If *Archive Manager for Exchange* is installed, then you must restart the services for this product as well.
2. Open a supported browser.
3. Enter the URL `<archive-manager-server-fqdn>/ArchiveWeb/Login/Login/Login`.
4. Verify that you can login and the ArchiveWeb page as shown below is loaded successfully.



4

Configuration

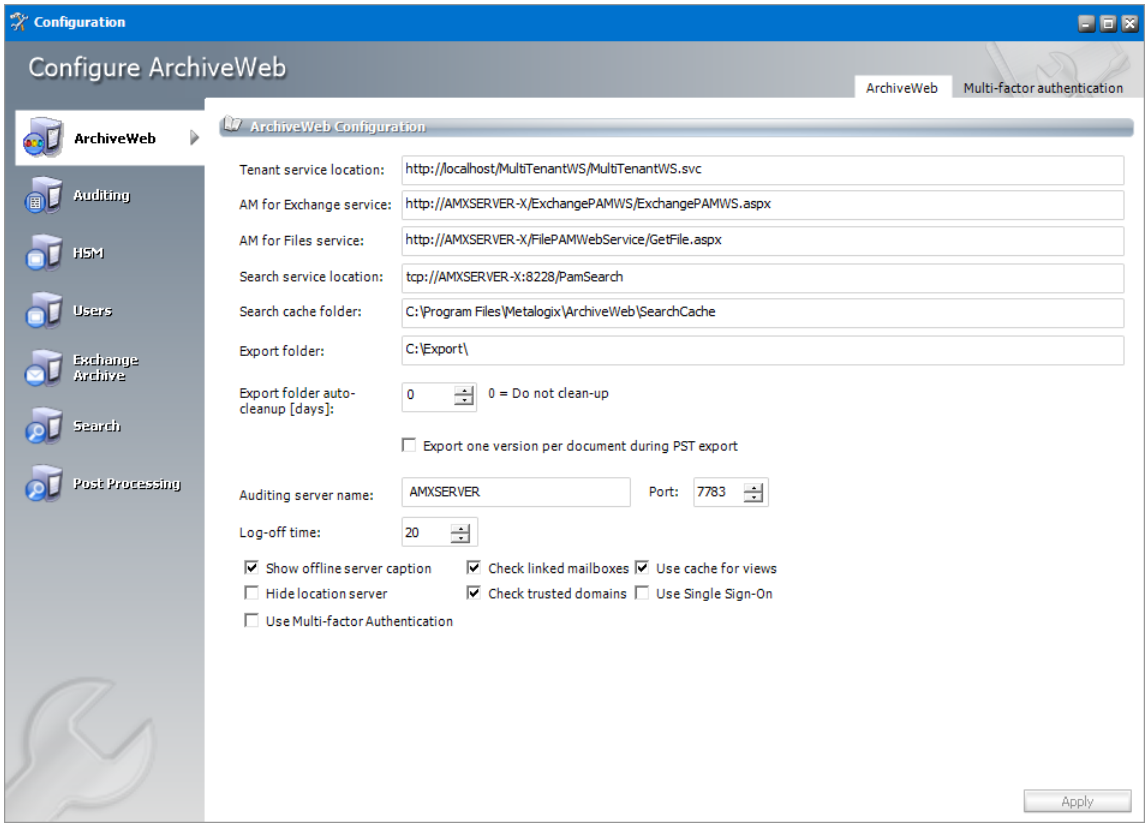
In this chapter:

- ArchiveWeb Setup
- Multi-factor Authentication
- Search Scopes
- Post-processing
- Compliance

ArchiveWeb Setup

ArchiveWeb is configured and ready for use right after installation. No user action is required. However, should the need arise, default configuration can be adjusted in Configuration tool.

The Configuration tool is available on the ArchiveWeb server under *<installdir>/Program Files (x86)/Common Files/PAM/PAMConfig/PamConfig.exe*. Its **ArchiveWeb** tab list available configuration options. (For more information on the **Multi-factor authentication** tab see the section *Multi-factor authentication (MFA)*.)



Specify the properties as described below:

Tenant service location - URL for MultiTenantWS web service

AM for Exchange service - URL for ExchangePAMWS web service if Archive Manager for Exchange is installed.

AM for Files service - URL for FilePAMWebService web service if Archive Manager for Files is installed.

Search service location - URL for PamSearch web service

Search cache folder - user's temporary storage folder to store e.g. messages downloaded from Exchange server for preview functionality

Export folder - folder where exported files (PST export, ZIP export) are stored (download link points to this folder)

Export folder auto-cleanup [days] - files older than the specified number of days will be deleted from the **Export folder**.

Export one version per document during PST export - indicates whether to export one version per document during PST export

Auditing server name & port - machine where auditing component is installed

Log-off time - time in minutes to log off when inactive

Show offline server caption - check to show [OFFLINE] suffix for decommissioned servers in servers' list if Archive Manager for Files is installed.

Hide location server - unchecked by default; indicating whether to hide Location Server Name from user's mailbox displayed in Mailboxes tree-view; if not checked, Location Server Name will be displayed as a suffix to user's email, e.g. `administrator@[VMMVC5]`

Check linked mailboxes - checking whether currently logging user has a linked mailbox associated. When unchecked, the entire login process can be accelerated because no additional Active Directory search is performed

Check trusted domains - checking trusted domains and reading information from trusted relationships. When unchecked the entire login process can be accelerated because no additional reads (from trusted domains) are performed

Use cache for views - when checked, all grid source data are cached after first load. Then all operation on grid that do not change the data will be performed quicker

Use Single Sign-On - when this option is checked, it will set Single Sign-On feature for ArchiveWeb login.

Multi-factor Authentication

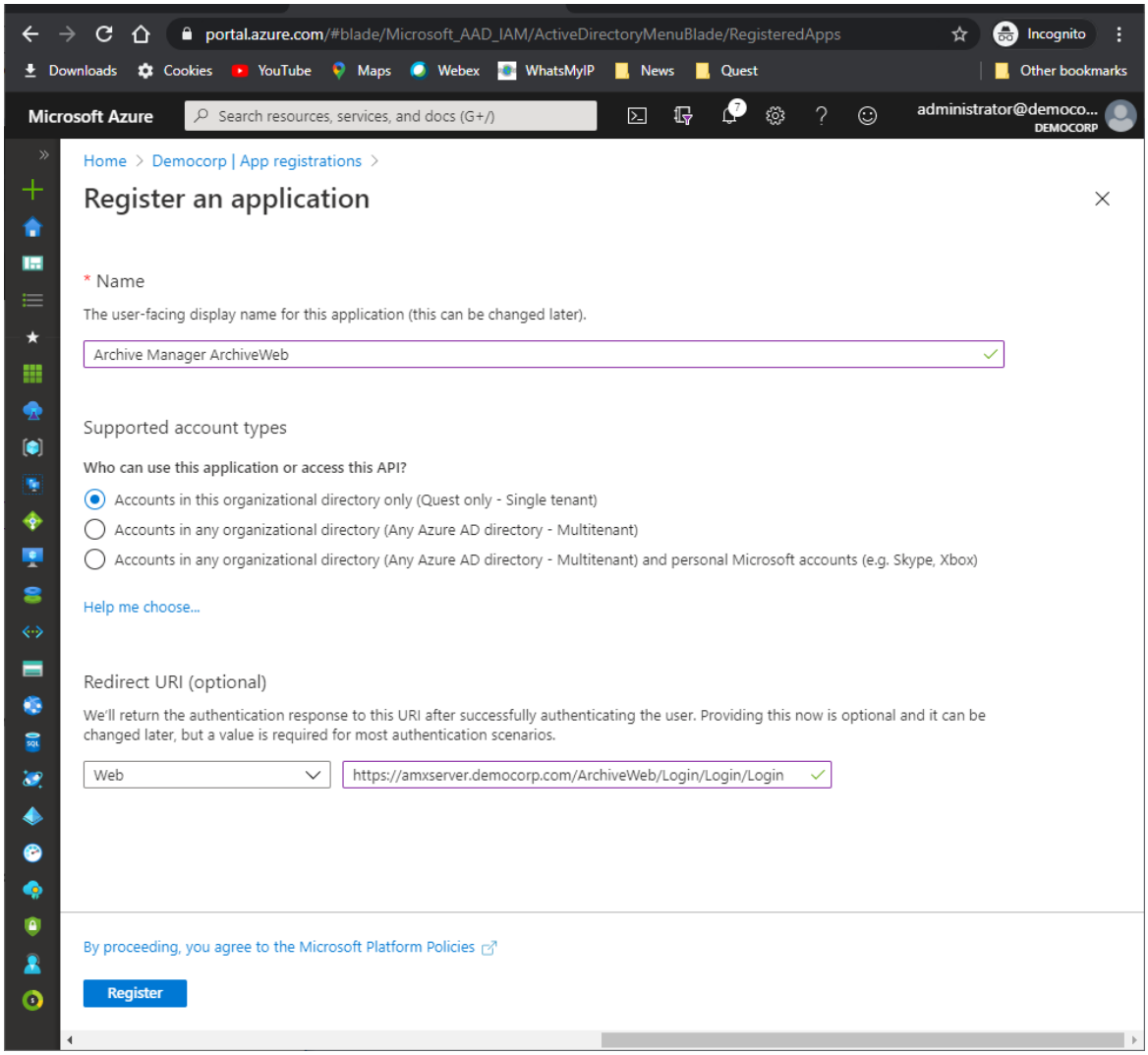
ArchiveWeb supports multi-factor authentication (MFA) for O365 user accounts. Setting up MFA is a two-step process:

1. Create a new application in the Azure portal.
2. Configure ArchiveWeb with the Archive Manager configuration tool.

Create a new application in the Azure portal

ArchiveWeb requires a specific Azure site to be created that is used to return an authentication token back to the ArchiveWeb after a user is authenticated via Microsoft portal.

1. Login to your Azure Portal using your administrator credentials (https://portal.azure.com). If your account gives you access to more than one tenant, select your account in the top right corner, and set your portal session to the Azure AD tenant that you want.
2. In the left-hand navigation pane, select the **Azure Active Directory** service, and then select **App registrations** > **New registration**. The *App registrations* page appears.
3. Click **New registration**. The *Register an Application* page appears.



4. Provide the information on this page as described below:

   a. **Name** - Enter a meaningful application name that will be displayed to users. For example, **Archive Manager ArchiveWeb**.

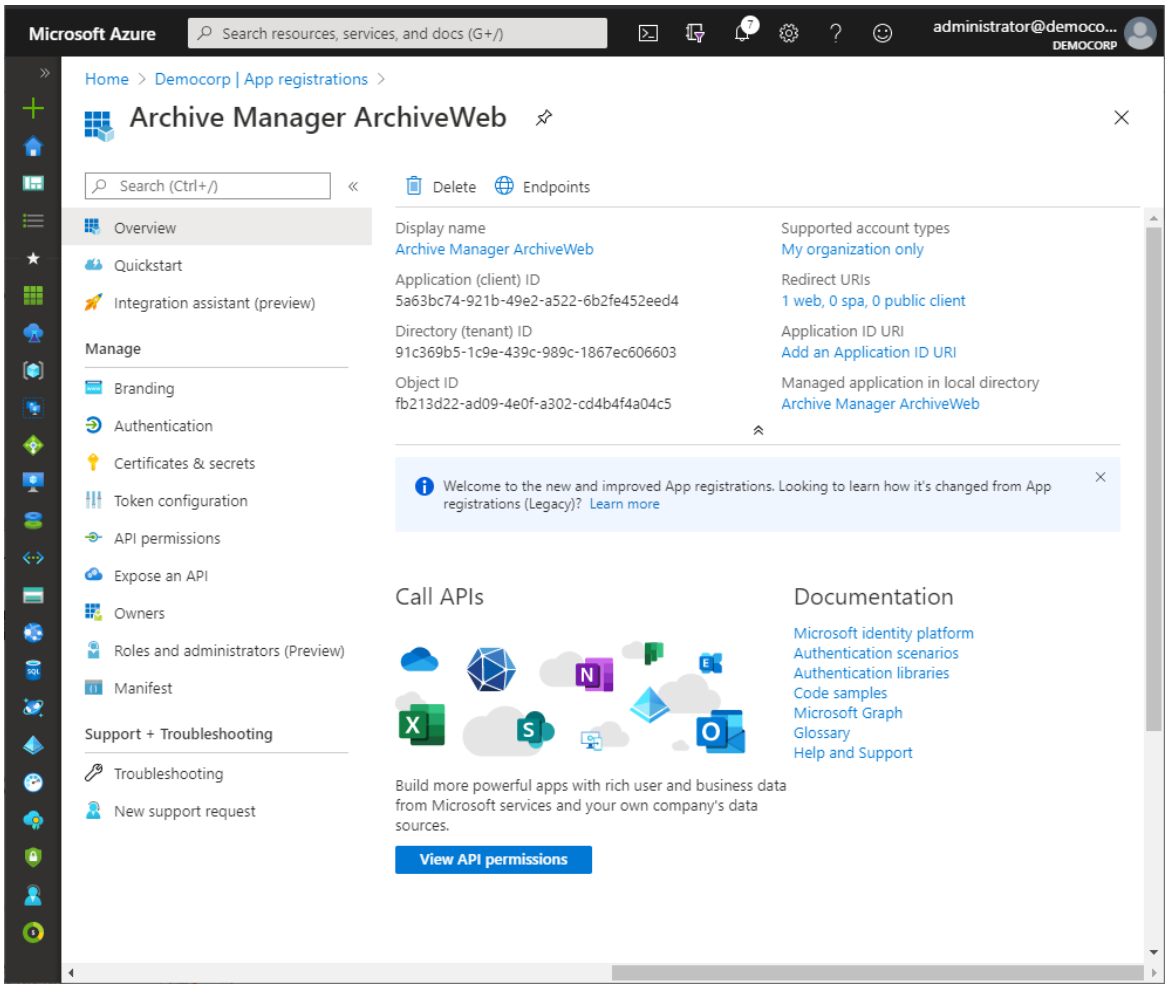
   b. **Supported account types** - Select the account type you would like your application to support that best meets your company policy.

   c. **Redirect URI** - from the *application type* drop down select **Web**. In the URI field enter the ArchiveWeb URI where the user will be redirected after multi-factor authentication (eg. `https://<fullservername>/ArchiveWeb/Login/Login/Login`)

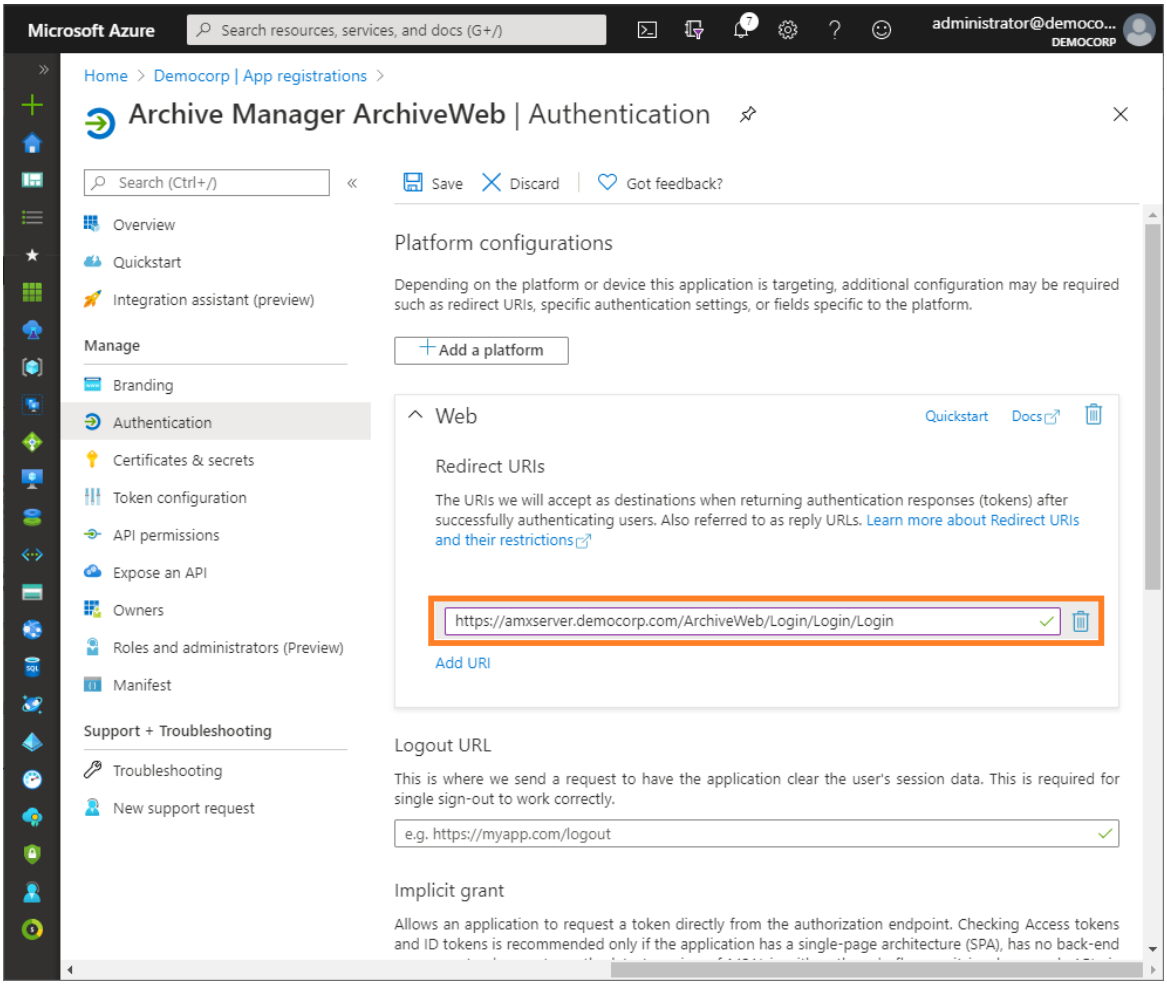
   > **NOTE:** The HTTPS protocol is required for MFA to work with O365. To ensure the HTTPS can be used, follow the steps below;
   >
   > 1. On the ArchiveWeb server, open the IIS Management Console.
   > 2. Expand the server node and then expand the Sites node.
   > 3. Select Default Web Site and right-click to open the context menu. Then select Edit Bindings. The Site Bindings window opens.

4. Click Add. The Add Site Bindings window opens.
5. Select https from the Type drop down and fill in the other details as required.
6. Click OK to save the https site binding.
7. Restart the IIS service from the server node and then close the IIS Management console.

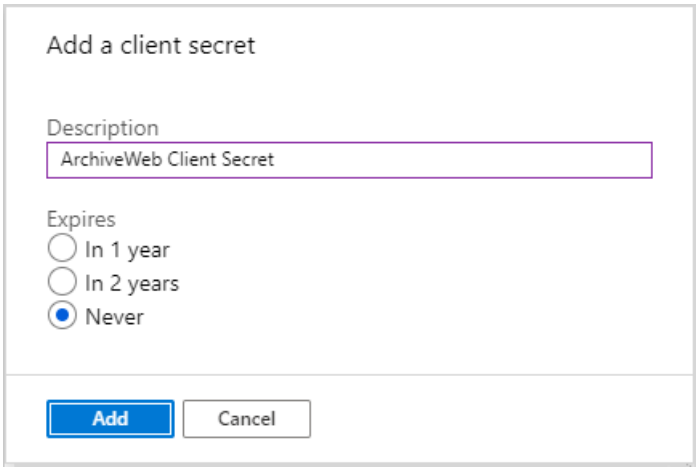
5. Click **Register**. Azure AD assigns a unique application (client) ID to your app, and the application's *Overview* page opens.



6. From the navigation menu, click **Branding**. Enter the URLs that your organization may use for the different branding artifacts.
7. From the navigation menu, click **Authentication** and verify that the Redirect URI parameters are as expected.



8. From the navigation menu, click **Certificates & Secrets**.
9. In the *Client secrets* section click **New client secret**. the Add a client secret page opens.

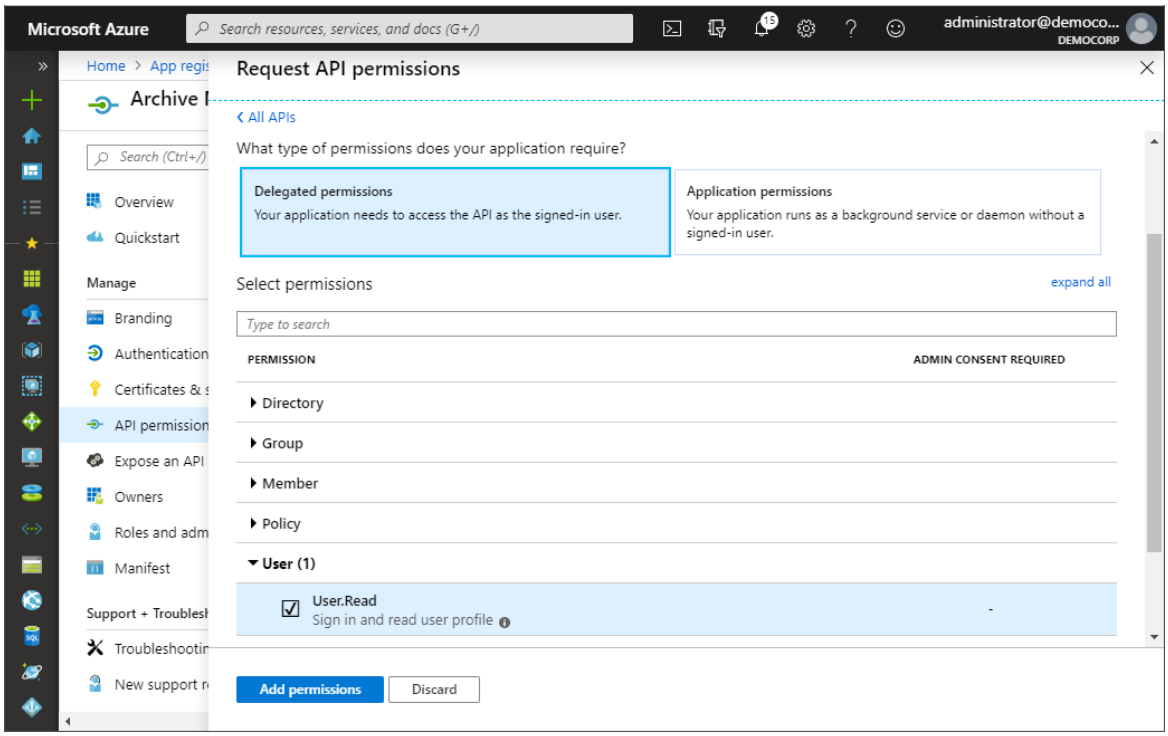


10. Enter values as described below:
    a. **Description** - enter a meaningful description. For example, ArchiveWeb Client Secret.
    b. **Expires** - set the expiry term that best meets your company policy.
11. Click **Add**. the client secret is displayed on the Certificates & Secrets page.

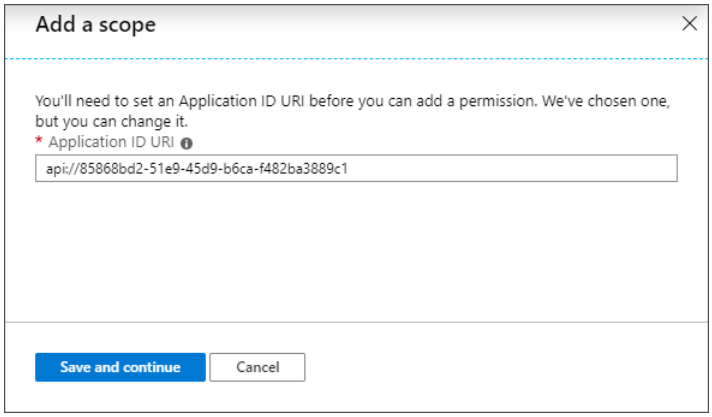
IMPORTANT: Copy and save the client secret in a safe place. It will not be available when you navigate away from this Azure blade.

12. From the navigation menu, click **API Permissions**. and then click **Add a permission**. The *Request API permissions* page appears.
13. From the **Microsoft APIs** category, scroll down to the *Supported legacy APIs* section and select **Azure Active Directory Graph**.

14. From the *Request API permissions* page for Azure Active Directory Graph that appears, select **Delegated permissions**.



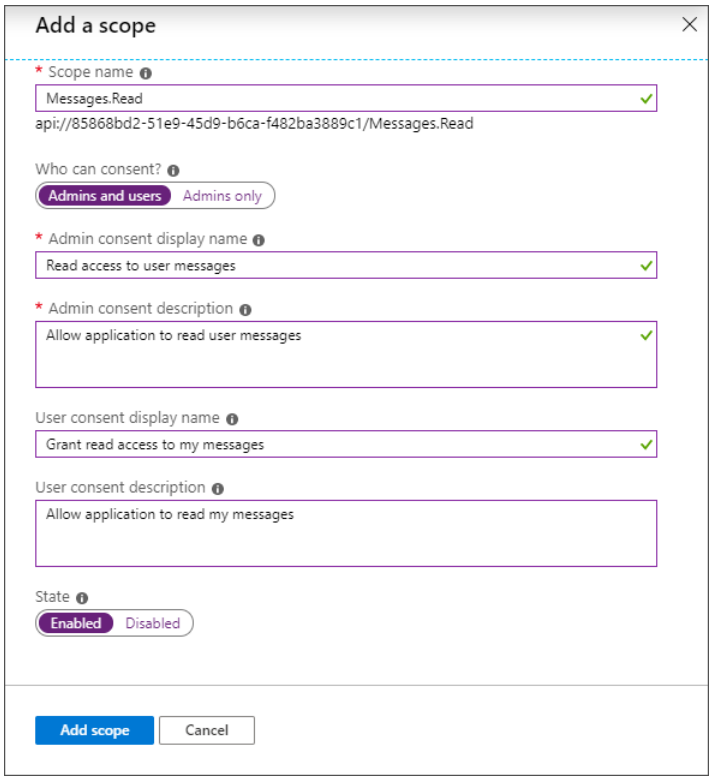
15. Click **Add permission**.
16. From the navigation menu, click **Expose an API**.
17. In the *Scopes defined* section, click **Add a scope**. The *Add a scope* page opens.



18. Microsoft Azure generates an Application ID URI automatically. It is a globally unique URI used to identify this web API. It is the prefix for scopes and in access tokens,and is also referred to as an identifier URI. You can keep this value or specify a unique value in the same format.

> **IMPORTANT:** Copy and save this value in a safe place.

19. Click **Save and continue**. The *Add a scope page* displays more options.

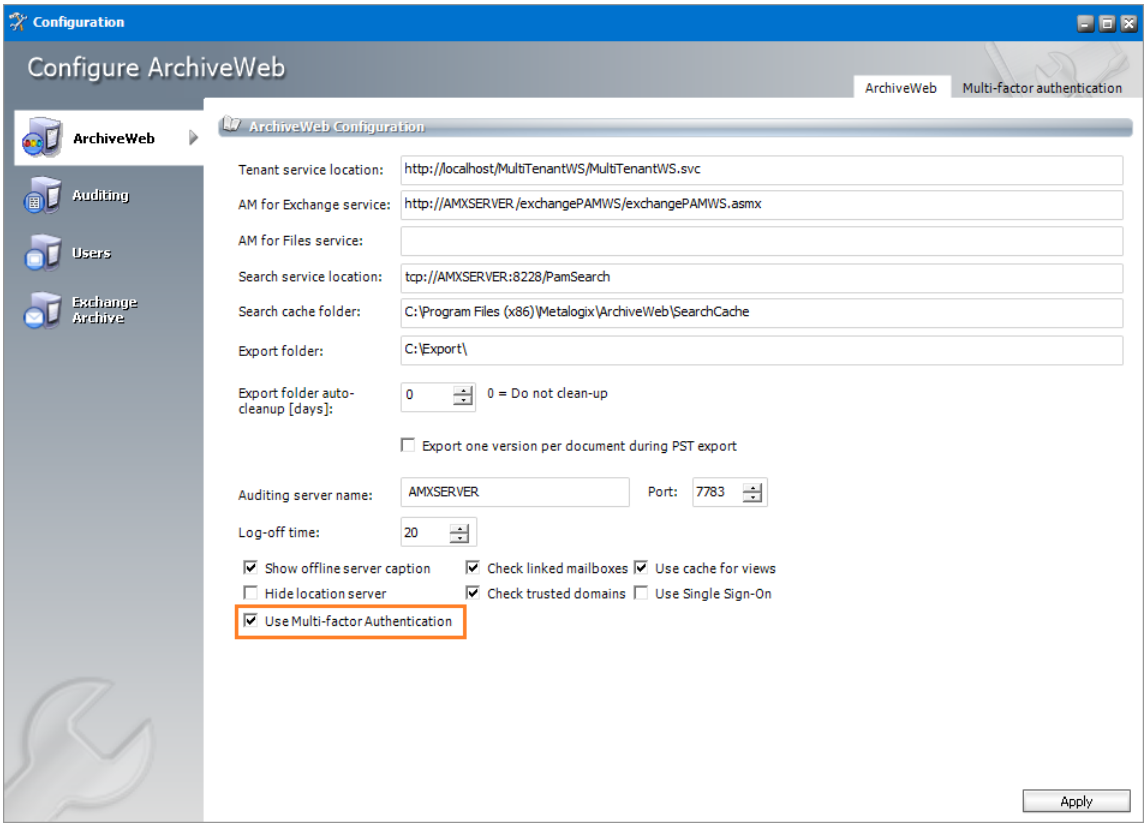


20. Click **Add scope** to complete the registration.

Configure ArchiveWeb with the Archive Manager configuration tool

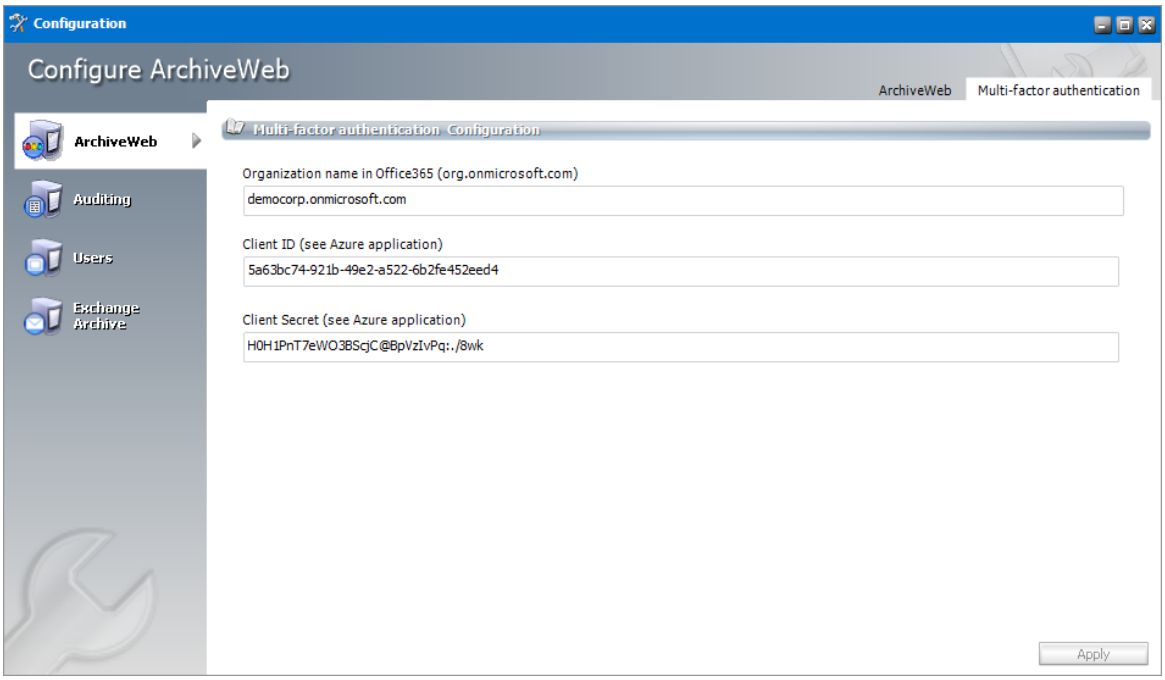
1. Open the Archive Manager Configuration Tool from *C:\Program Files (x86)\Common Files\PAM\PAMConfig\PamConfig.exe*
2. From the sidebar, click **ArchiveWeb**.

3. Click the **ArchiveWeb** tab. The *ArchiveWeb Configuration* page appears.



4. Select the **Use Multi-factor Authentication** check box to activate the fields in the *Multi-factor authentication Configuration* window.

5. Click the **Multi-factor authentication** tab. The *Multi-factor authentication Configuration* window appears.



6. Enter the field values as described below:

a. **Organization Name in Office365** - enter the name of your O365 organization URL. For example, *democorp.onmicrosoft.com*

b. **Client ID** - enter the Client Id that you saved from the Azure application registration steps.

c. **Client Secret** - enter the Client Secret that you saved from the Azure application registration steps.

7. Click **Apply**.

IMPORTANT:

When at least one user in an organization has MFA set, the Organization, Client ID and Client Secret should be set in Multi-factor authentication tab as a readiness exercise.

If only a few users in your organization have MFA activated, the **Use Multi-factor Authentication** check box should stay unchecked. The settings in the *Multi-factor authentication* tab will persist when the Use Multi-factor Authentication check box is unchecked. The users who have MFA activated will be prompted to enter the credentials (user email and password) and then they will be redirected to the Microsoft site where the user has to authenticate again. After a successful authentication by Microsoft, the user will be redirected back to ArchiveWeb.

When all users accounts in an organization have MFA activated, the **Use Multi-factor Authentication** check box can be selected. This will allow ArchiveWeb to use multi-factor authentication for all users that log in to ArchiveWeb. Users will be prompted to enter only the login email address and they will be redirected to the Microsoft login form to finish the login process.

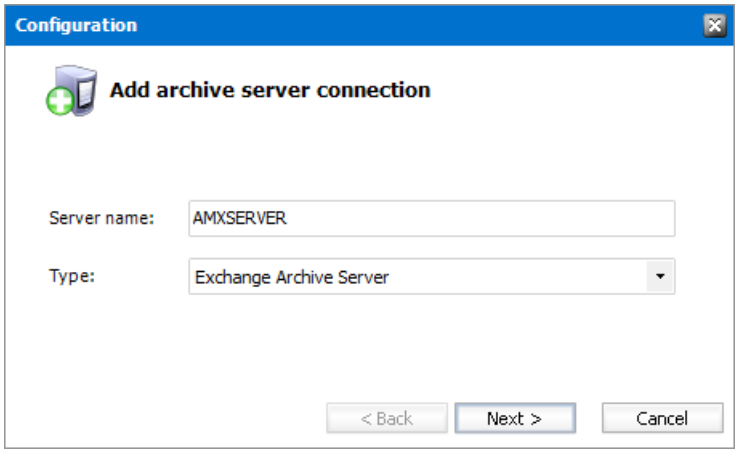
Search Scopes

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. Search scopes must be configured to allow searching for archived emails with ArchiveWeb. A search scope is a specified Archive server.

NOTE: If you install Archive Manager for Files with the Express or Advanced installation option, Search Scopes is automatically configured for you. If you install Archive Manager for Files manually, you must configure the Search Scopes manually.

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.



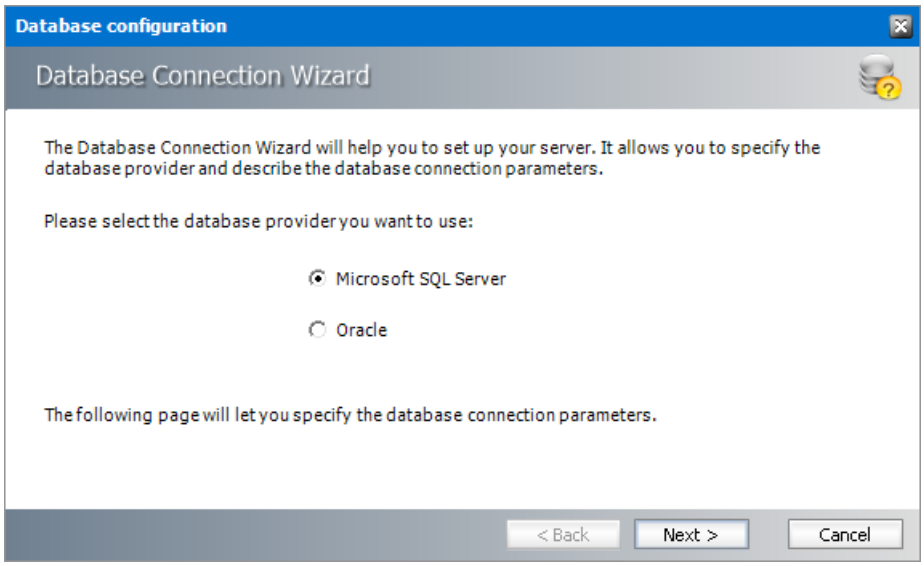
Enter the information and described below:

a. **Server name** - name of the Archive Manager for Files server (eg. AMFSERVER).

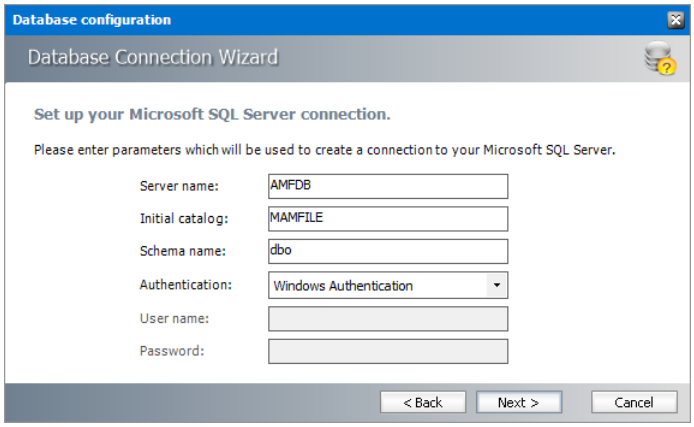
b. **Type** - Select **File Archive Server**.

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.



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



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

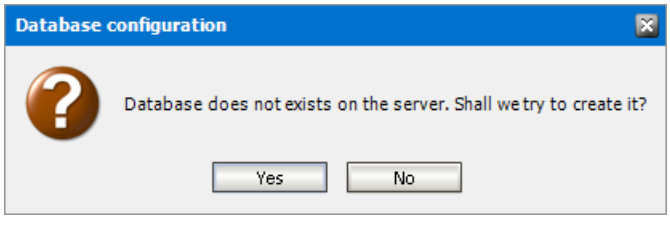
g. **Oracle net name** - net service name that describes the network address of the HSM database in your `tnsnames.ora` file (eg. **AMFDB**)

h. **Schema** - name of the Archive Manager for Files database (e.g. **MAMFILE** which is the default name of the Archive Manager for Files database)

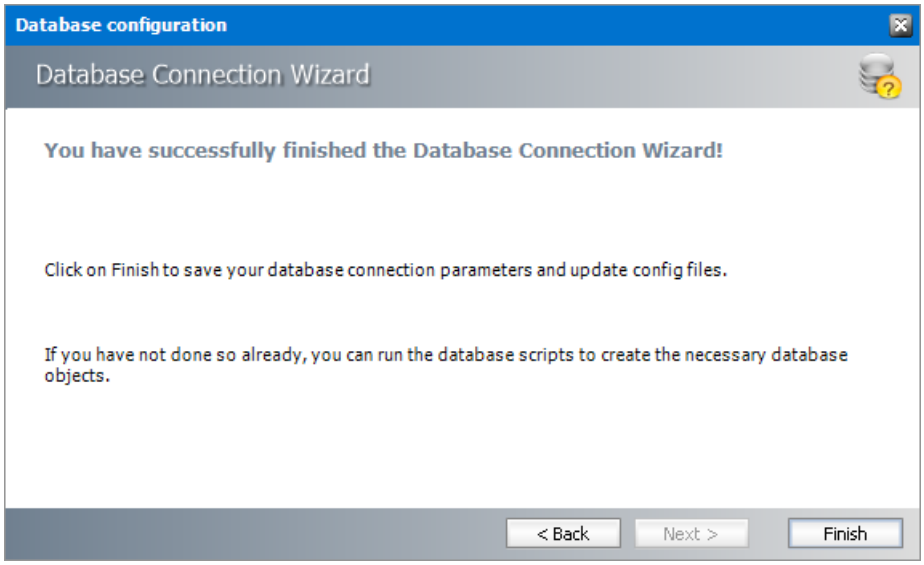
i. **User name** - database login user name

j. **Password** - password of the database user

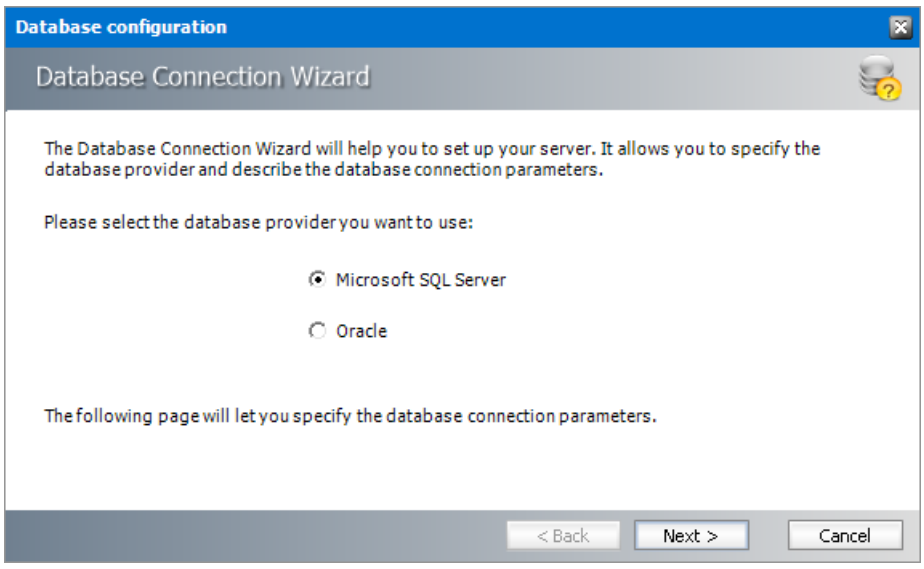
5. Click **Next** and then click **Yes** on the confirmation dialog that opens.



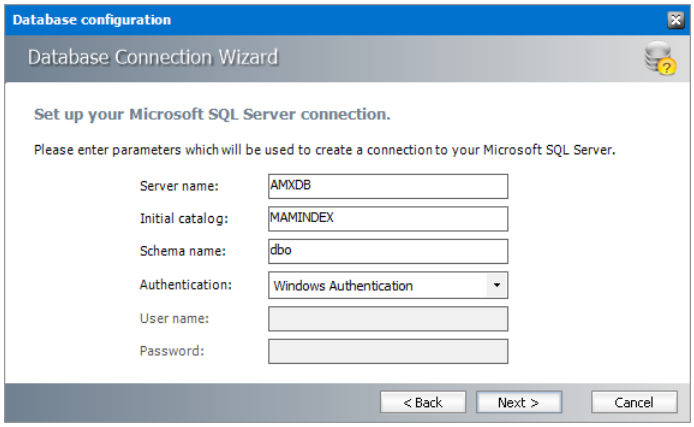
6. If the database connection is setup successfully, the configuration confirmation window opens.



7. Click **Finish** to close the *Database Connection* wizard. The *Setup the Index database connection* window opens.
8. If the database already exists, click **Import**. Otherwise click **Configure** to setup the Index database connection. The *Database Connection* Wizard opens.



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



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

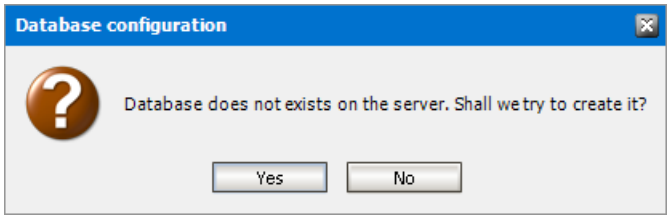
g. **Oracle net name** - net service name that describes the network address of the HSM database in your `tnsnames.ora` file (eg. **AMFDB**)

h. **Schema** - name of the Archive Manager for Files database (e.g. **MAMINDEX** which is the default name of the Archive Manager for Files database)

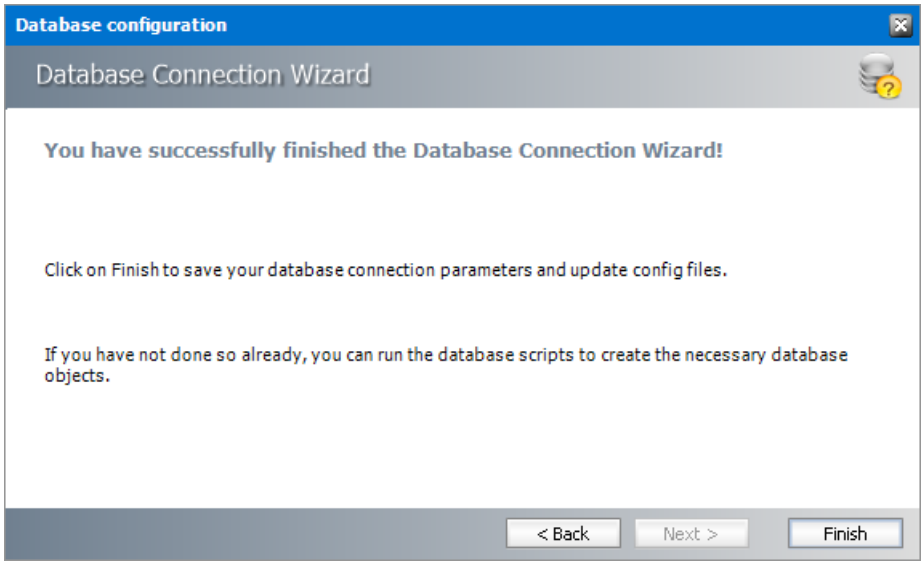
i. **User name** - database login user name

j. **Password** - password of the database user

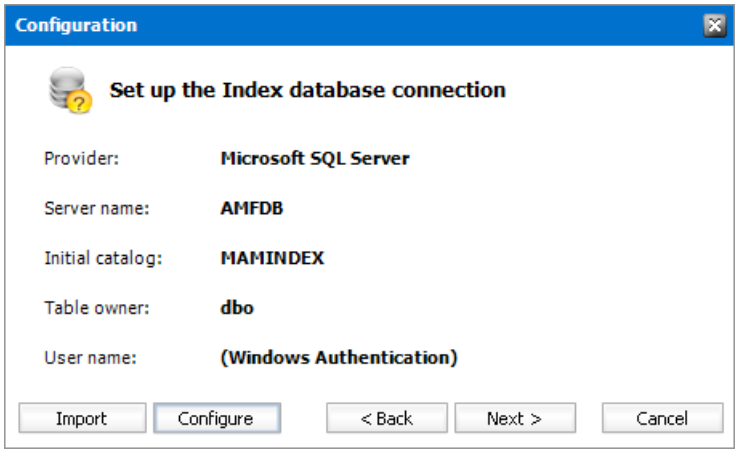
10. Click **Next** and then click **Yes** on the confirmation dialog that opens.



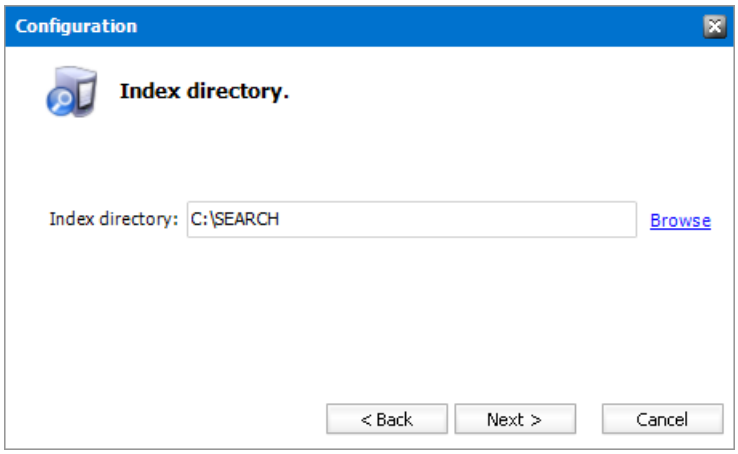
11. If the database connection is setup successfully, the configuration confirmation window opens.



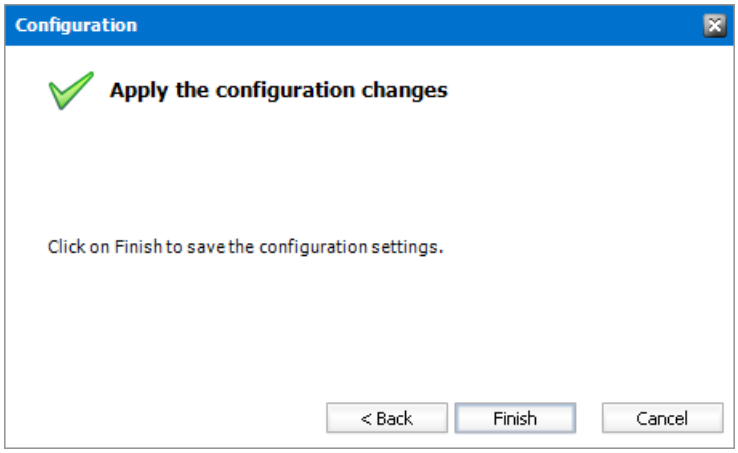
12. Click **Finish** to close the *Database Connection* wizard. The *Set up the Index database connection* window reopens.



13. Click **Next**. The *Configuration* window for the *Index directory* opens.

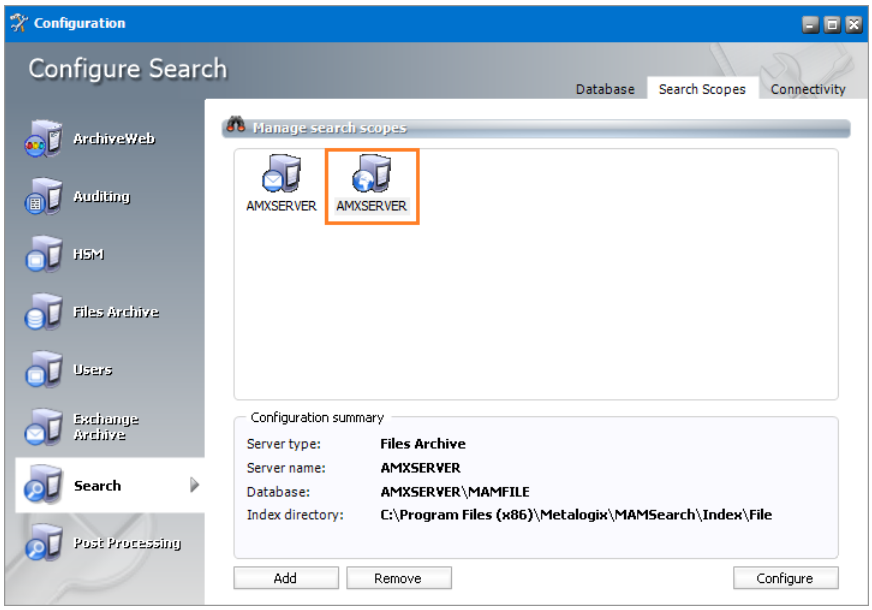


14. Click **Browse** to select or create a folder for the search index and then click **Next**. The *Apply the configuration changes* confirmation window opens.

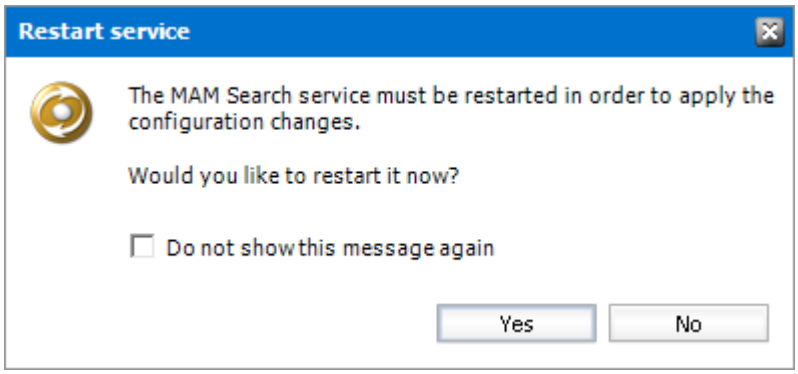


15. Click **Finish**. The Archive server for **Server type** = **Files Archive** is added to the *Manage search scopes* section. Click the icon for the Archive server that you added, and verify the information in the *Configuration summary* section.

> **NOTE:** Search scopes for Archive Manager for Exchange and Archive Manager for Files are separate entities based on the **Server type**.



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



17. Close the *Configuration* wizard.

Post-processing

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. Post processing scopes must be configured to allow specific tasks from search results in ArchiveWeb. A Post Processing scope is a specified Archive server.

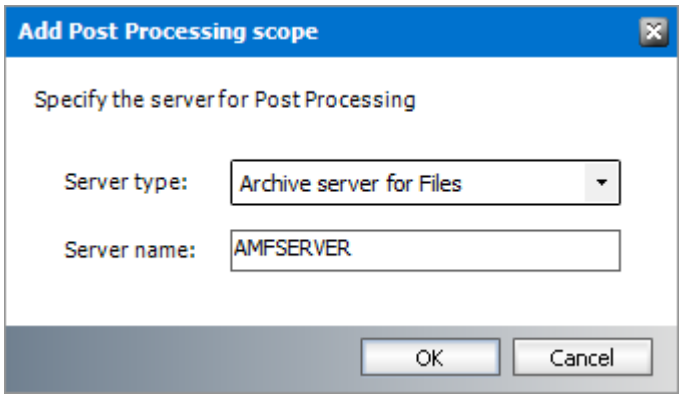
NOTE: If you install Archive Manager for Files with the Express or Advanced installation option, Post Processing Scopes is automatically configured for you. If you install Archive Manager for Files manually, you must configure the Post Processing Scopes manually.

In this topic:

- Steps to configure Post Processing Scopes

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.



   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**.

Compliance

ArchiveWeb provides the ability to manage user access to archived files on a network share. Users must accept the security policy to be able to open archived files.

As an administrator or a user with the appropriate permissions, you can define a policy condition, agreement term, and reminder. You can define notification templates for Access Denied and

Reminder messages and see a list of all users with the date of acceptance of conditions and status.

Users are notified by email when access to a protected archive file is denied and when the policy consent expires.

> **NOTE:** Email notifications are sent only once. It is recommended that the administrator should send an email to all first-time users who are registered in ArchiveWeb to accept the policy agreement.

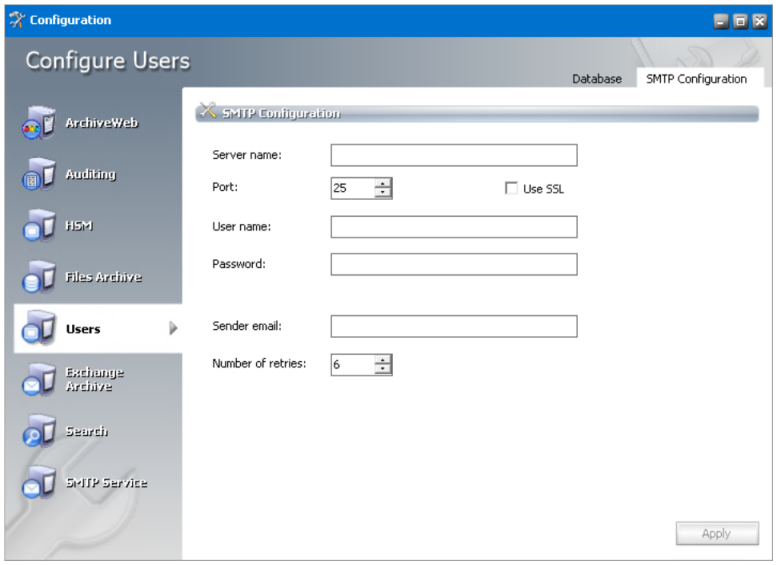
In this topic:

- Configuring the SMTP server
- Activating compliance
- Granting compliance permissions to users
- Viewing agreements
- Configuring templates
- Configuring compliance settings
- Accepting compliance agreements

Configuring the SMTP server

A working SMTP server is needed to send notification emails to users. The SMTP server must be configured with the *Archive Manager Configuration Tool*.

1. Open the Archive Manager Configuration Tool from `<installdir>\Program Files (x86)\Common Files\PAM\PAMConfig\PamConfig.exe`.
2. From the feature panel on the left in the *Configuration* wizard, click **Users.**
3. Verify that the database and scripts are up to date.
4. Open the **SMTP Configuration** tab and set the properties as described below:



Server name - Name or IP address of the SMTP server

Port - SMTP server port

Use SSL - select the check box if the SMTP server requires an SSL connection

User name, **Password** - SMTP server credentials

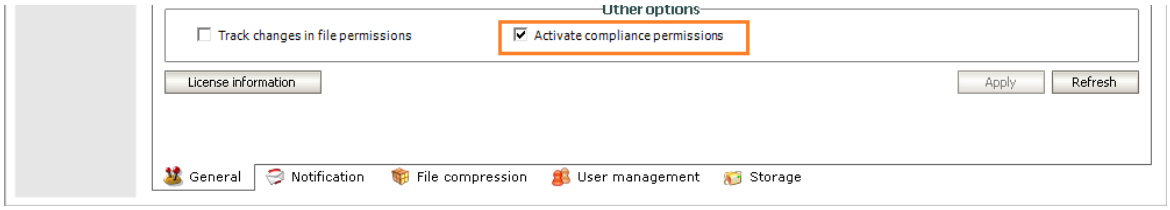
Sender email - Email address of the sender

Number of retries - Number of times that the SMTP server will attempt to send the message

5. Click **Apply** and then close the window.

Activating compliance

1. Open Archive Manager for Files
2. Connect to the Archive Manager for Files server
3. From the navigation panel, click **Settings**.

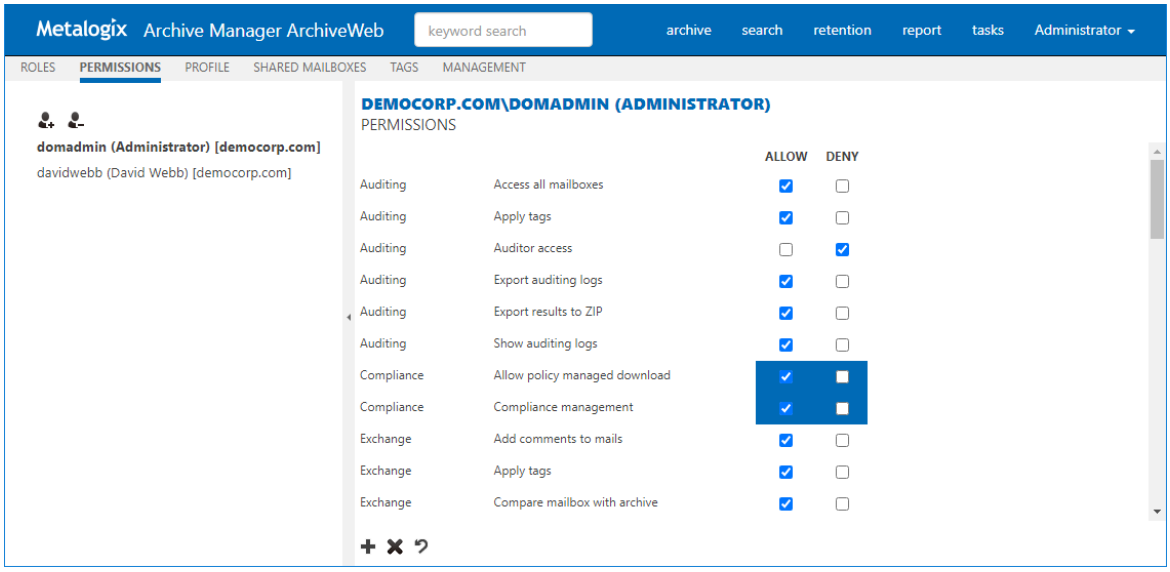


4. In the *Other options* section select the **Activate compliance permissions** check box and click **Apply**.

Granting compliance permissions to users

1. Log in to ArchiveWeb
2. From the main menu, click the username dropdown and then select **Manage settings**.
3. From the local toolbar, click **Permissions**.

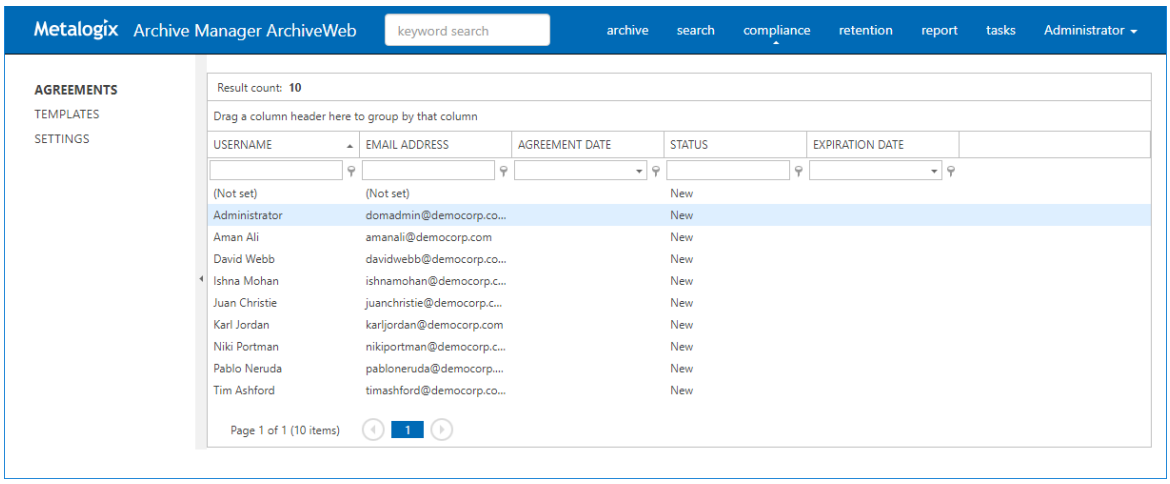
4. Click to search and add users.
5. Select the administrator and from the Permissions panel on the right, grant the following compliance permissions:
   - **Allow policy managed download**
   - **Compliance management**



6. Add more users and grant the **Allow policy managed download** to grant access to archived files. Grant **Compliance management** if the user requires management access.
7. All users must log out and log in again to refresh compliance settings in their session of ArchiveWeb.

Viewing agreements

1. Log in to ArchiveWeb
2. From the main menu, click **Compliance**.
3. From the navigation panel, select **Agreements**.



The columns are described below:

a. **Username** - Name of the user

b. **Email address** - email address of the user

c. **Agreement date** - date and time when the compliance policy was accepted.

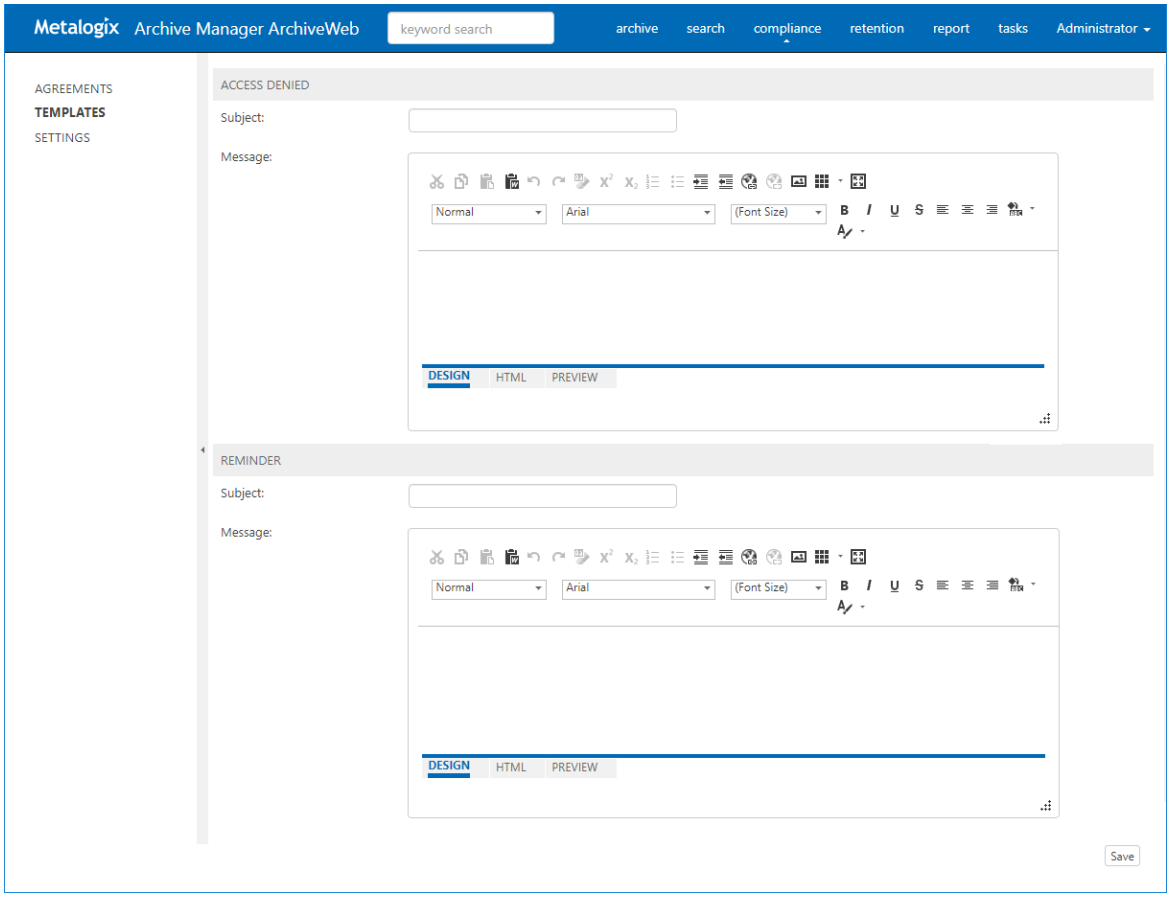
d. **Status** - status of the compliance policy. the status value are as follows:

- **Approved** - User has confirmed their agreement to the policy.
- **Rejected** - User has declined the policy.
- **New** - Administrator has granted the **Allow policy managed download** permission, but the user has not yet accepted the policy agreement.
- **Canceled** - Administrator has changed the policy settings and canceled all user agreements.
- **Expired** - the policy term has ended.

e. **Expiration date** - Date and time when the compliance policy expires.

Configuring templates

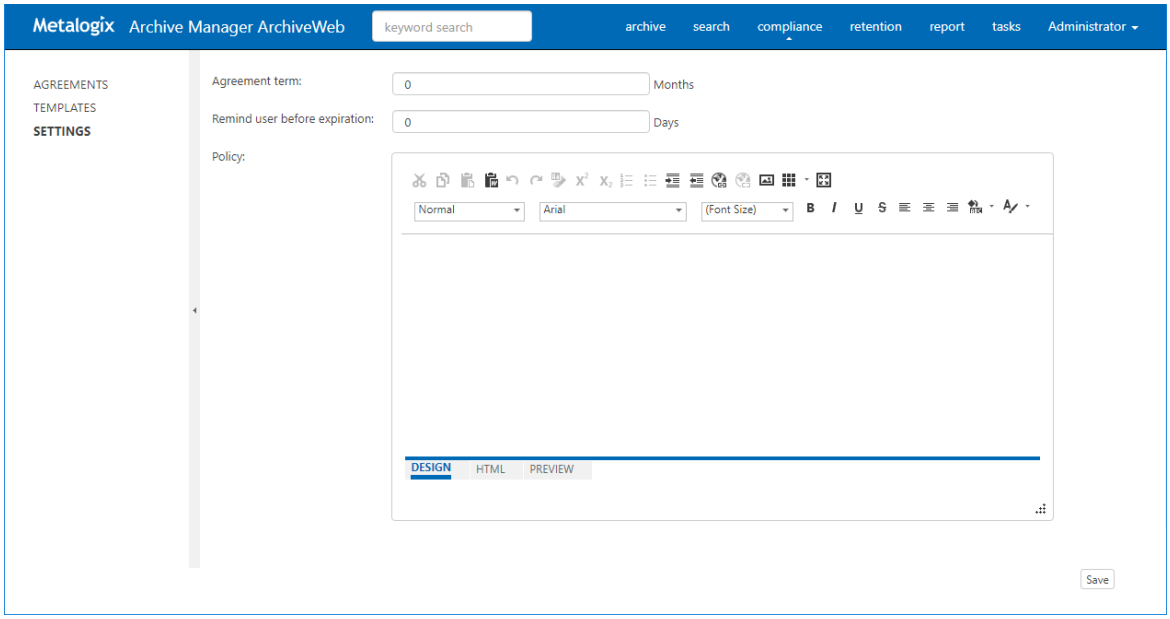
1. Log in to ArchiveWeb.
2. From the main menu, click **Compliance**.
3. From the navigation panel, select **Templates**.



4. In the top section, prepare the template for the *Access Denied* message in the template editor.
5. In the bottom section, prepare the template for the *Reminder* message in the template editor.
6. Click **Save** at the bottom right corner to commit any changes.

Configuring compliance settings

1. Log in to ArchiveWeb
2. From the main menu, click **Compliance**.
3. From the navigation panel, select **Settings**.



Configure the settings as described below:

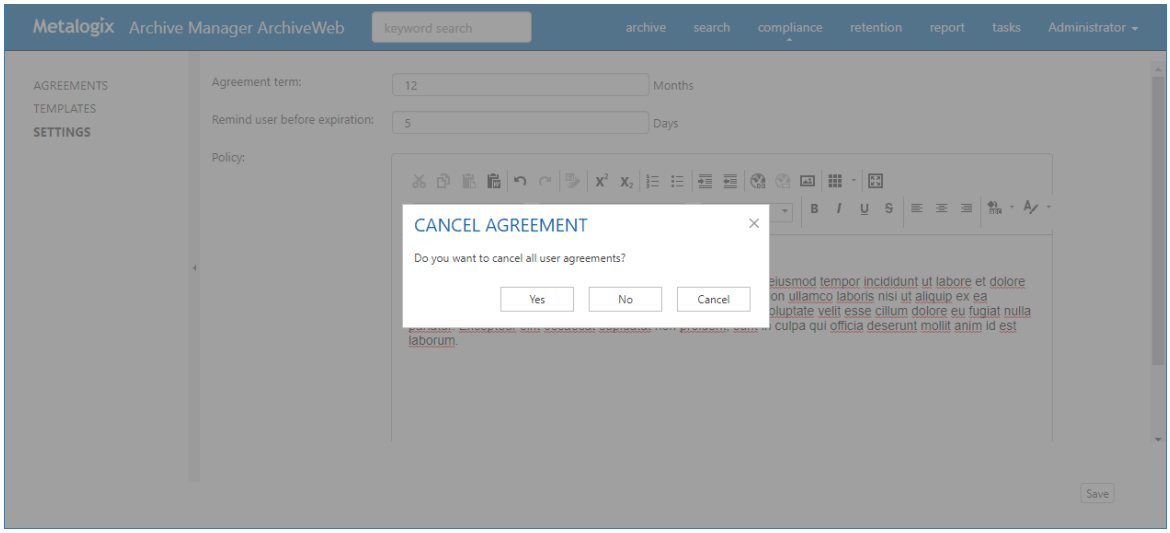
a. **Agreement term** - Number of months during which the policy is active.

b. **Remind user before expiration** - Number of days before the policy expires when a reminder message will be sent to the user.

c. **Policy** - prepare the policy statement using the template editor.

4. Click **Save** at the bottom right corner to commit any changes.

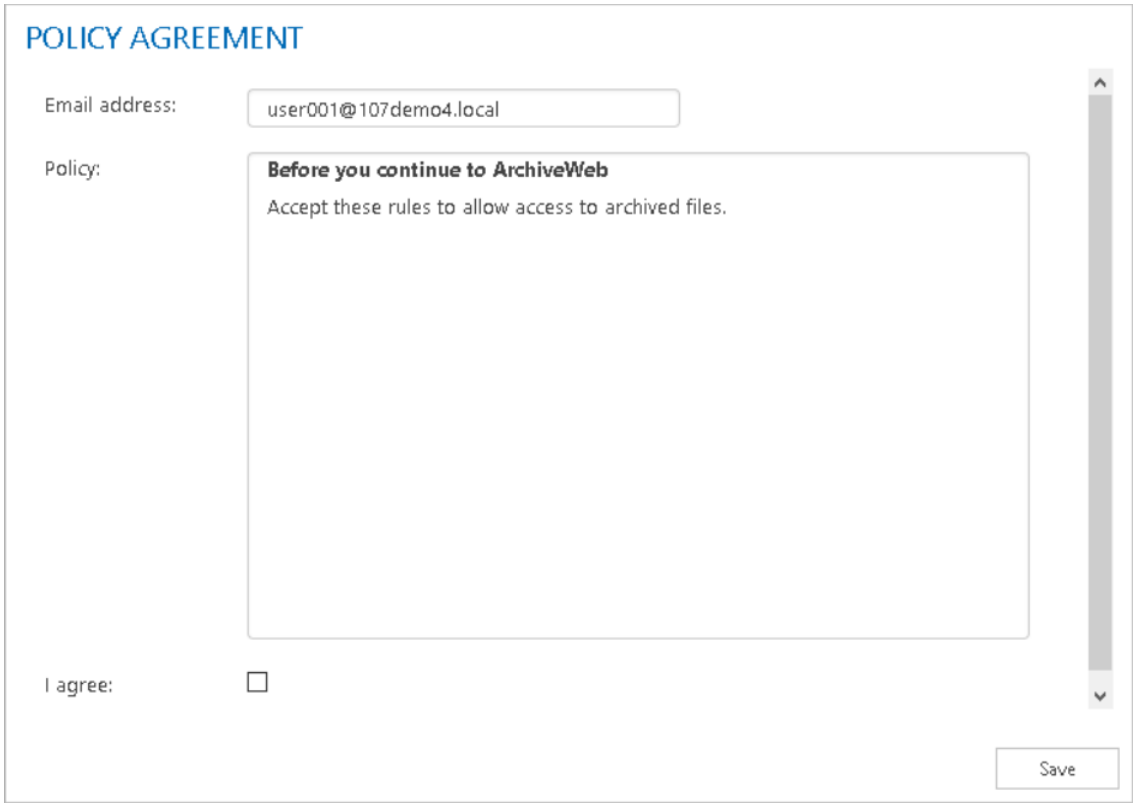
5. In *Cancel Agreement* dialog click **Yes** to cancel all agreements with users. Users must accept the new policy agreement. Click **No** to change the policy for new users only (or when saving a policy for the first time).



Accepting compliance agreements

When users who have been granted the **Allow policy managed download** permission log in to ArchiveWeb, then will see the *Policy Agreement* page. Users must accept the Policy Agreement to work with protected archived files. This page is also available to users from the [*User name*] > *Manage Settings* > *Profile* > *Policy Agreement* page, if they want to accept the agreement at a later time.

1. Select the check box **I agree**
2. Click **Save** at the bottom right corner to commit any changes.



5

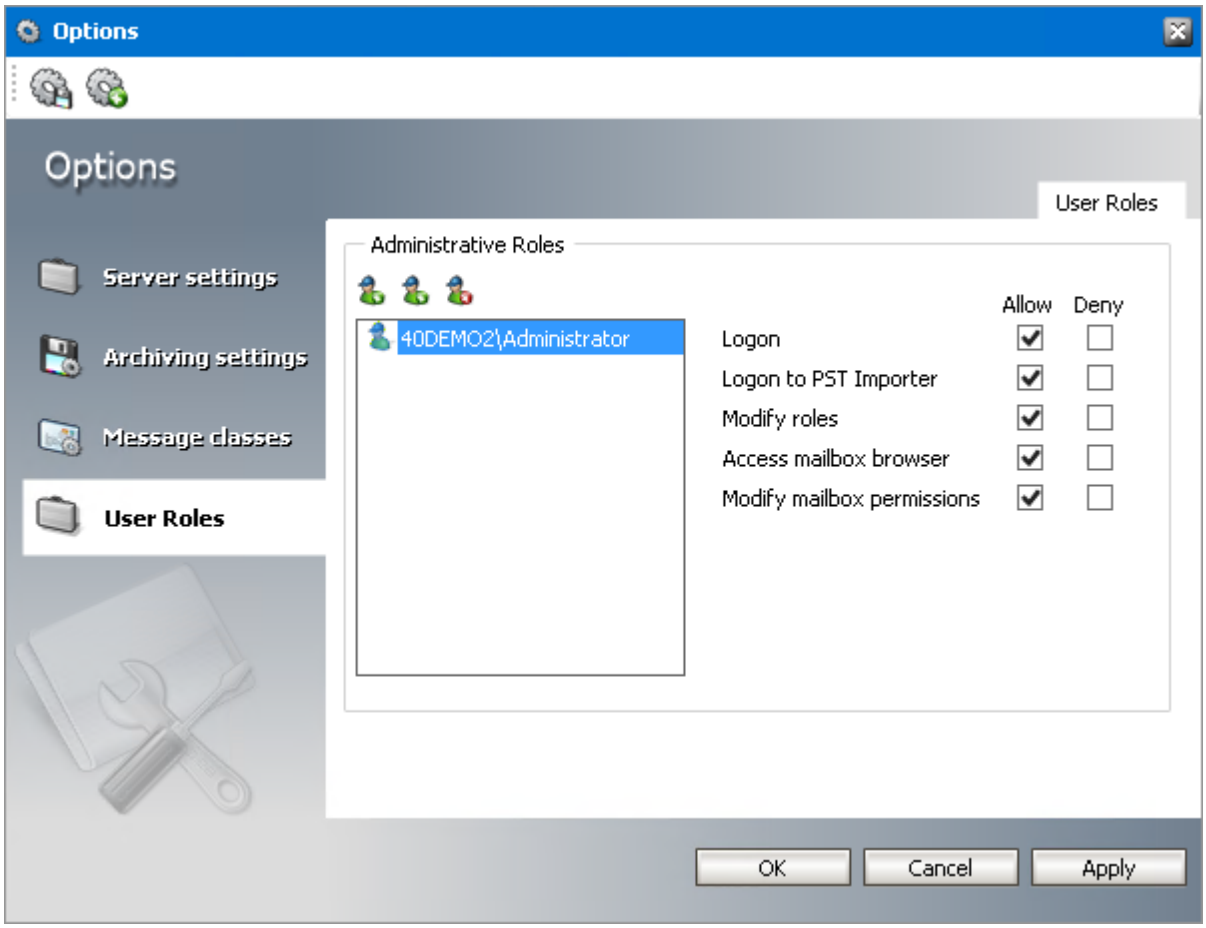
ArchiveWeb Settings

As default, only the super-user specified in Archive Manager for Exchange or Archive Manager for Files (see note below) can access ArchiveWeb and all its functions. If another user/group should be able to manage roles, super-user can allow access for them in the following ways:

- in ArchiveWeb under logged on user / **Manage settings** / **Permissions**
- in Archive Manager for Exchange Administration Center on the **Tools** / **Options** / **User Roles** the given user has to be added with **Modify roles** option checked
- in the Archive Manager for Files Administration Center on the **Settings** / **User management** tab the given user must have the **User management** permission allowed

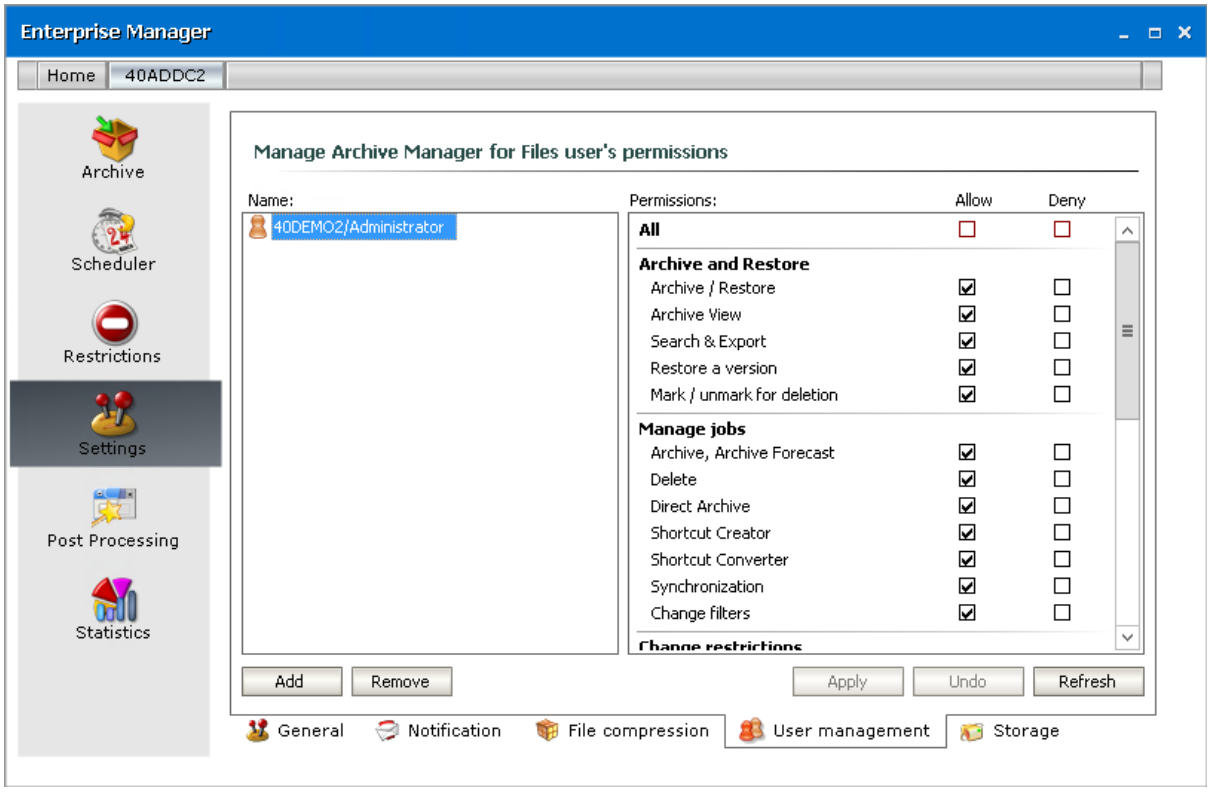
Please note: Super-user is specified in:

- Archive Manager for Exchange Administration Center / Tools / Options / User Roles)



or

- Archive Manager for Files (Enterprise Manager / Settings / User management)



Roles and Permissions pages allow permission management on user/group level. Individual users can inherit permission or can be granted direct permissions. The priority of permissions follows this order:

1. Direct permission defined for a user (blue highlight under Permissions) on a server
2. Global direct permission defined for a user (blue highlight under Permissions)
3. Inherited permission (yellow highlight under Permissions) on a server
4. Global inherited permission (yellow highlight under Permissions)
5. Default settings (no highlight under Permissions)

All defined permissions apply only for the given instance of ArchiveWeb.

On these pages you can allow or deny access to ArchiveWeb features and menu options for individual users or groups, i.e. allow or deny roles. Under **Roles**, users are assigned to roles. Under **Permissions**, roles are assigned to users.

Roles

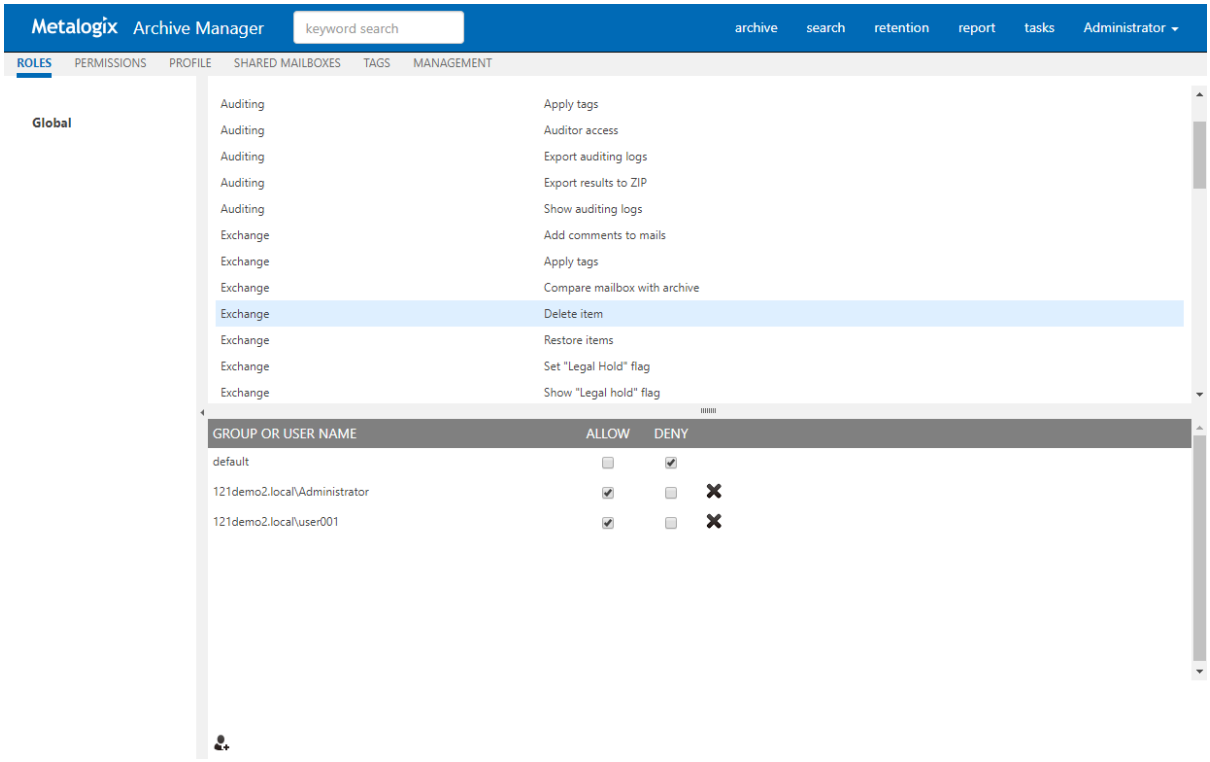
To display the **Roles** page, click the logged-on user name in the right-upper corner. Select **Manage settings** from the drop-down menu, then click **Roles** on the grey sub-bar. In the left pane select the server for which the roles should apply. Now you can assign users/groups to ArchiveWeb roles in the main pane.

List of roles is split into sections – Exchange Archive features are listed under **Exchange roles**, search features under **Search roles** etc. Select a role in the list view. All users/groups with access

to ArchiveWeb allowed in the Enterprise Manager are displayed under the list view. In case the desired user is not visible, click the *Find users and groups* icon ( ) to add it to the list. Current status of user/groups in respect to the given role is marked by a check mark.

If you click the *Delete* icon ( ) the user disappears from the list and will be assigned only the default roles.

NOTE: Users deleted in Active Directory but still existing in Archive Manager are displayed as strikethough.



To assign users/groups to roles:

1. In the left pane the **Global** option is selected by default; i.e. the configured settings apply to all Archive Servers (File Archive or Exchange Archive) in the environment. Should you wish to apply settings only for a specific server, click it in the left pane; e.g. if you want to allow *Legal Hold* only for one File Archive Server and not for others.
2. Select the desired role in the list of roles.
3. If the desired user/group does not appear among associated users under the list view, you can add it. Click the plus sign ( ) on the bottom. The **Find users or groups** pop-up dialog appears. In the **Domain** drop-down box select the domain in which you want to search. Then search for the user/group.
4. Check the users/groups you want to manage and click **OK**.
5. The selected users/groups are displayed in the main pane. Manage their roles by checking **Allow** / **Deny**.

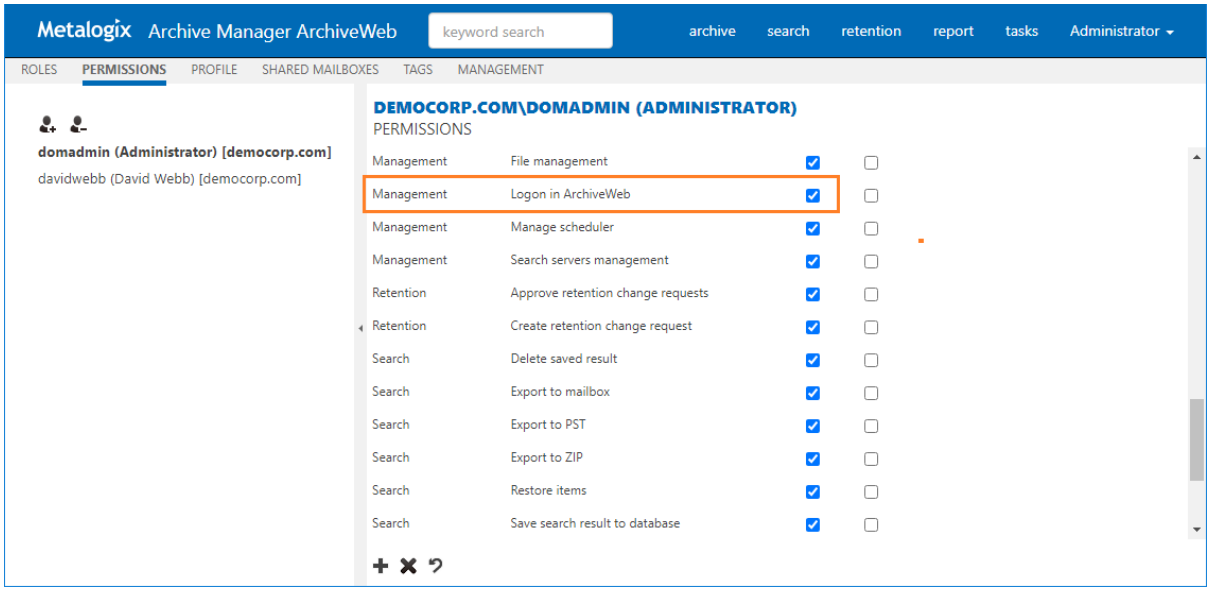
IMPORTANT NOTE:
If ***UseGlobalPermissionsForAllServers*** key is set to TRUE or this key does not exist in web.config, the *Roles* page lists only **Global** setting. In this case roles for users are set globally, i.e. role set will be applicable to all servers.

Otherwise, if the ***UseGlobalPermissionsForAllServers*** is set to FALSE, all available servers will be listed and roles can be set on any server/location. Using this option can slower login process because all accessible servers/locations needs to be searched for roles.

Permissions

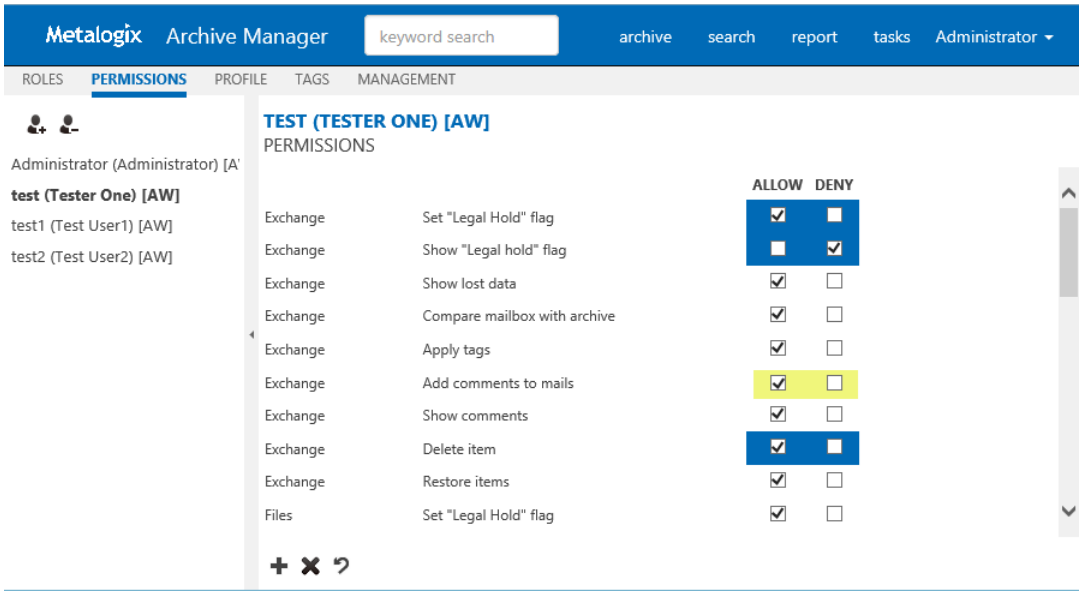
To display the **Permissions** page, click the logged-on user name in the right-upper corner. Select **Manage settings** from the drop-down menu, then click **Permissions** on the grey sub-bar. Now you can assign ArchiveWeb permissions to users/groups in the main pane.

Super-user has ability to control access list, i.e. who is allowed to log into ArchiveWeb. Super-user has to set user and/or group who has permission to log in ArchiveWeb. The affected permission is “Logon in ArchiveWeb” and can be set in Manage settings in Roles and/or Permissions sites:
Default permission is ALLOWED – user is allowed to log in ArchiveWeb.



Users/groups which already have some roles assigned manually are listed on the right. Click the user/group to display and manage its roles in the right pane. List of roles in the right pane is split into sections - Exchange Archive features are listed under **Exchange roles**, search features under **Search roles** etc.

NOTE: Users deleted in Active Directory but still existing in Archive Manager are displayed as strikethough.

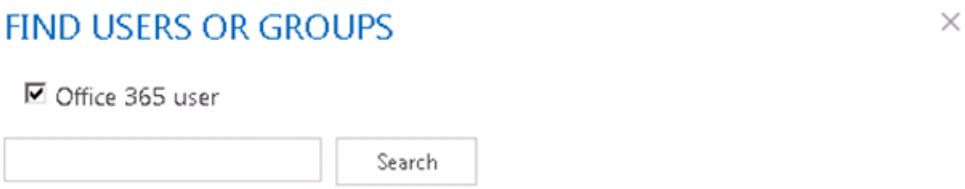


To assign roles to users/groups:

1. Select the desired user on the right. If the user is not listed, click the Add user or group symbol ( ) in the left pane.

2. In the **Find users or groups** pop-up dialog choose whether you'd like to search in Office 365 users or in Active Directory users.

   To search in Office 365 users – check **Office 365 user** checkbox. User can be searched by user-name, logon-name or display-name. Asterisk (*) wildcard can be used.
   Note: Office 365 users need to be previously imported via Archive Manager for Exchange.

   To search in Active Directory users – leave "Office 365 user" checkbox unchecked. Enter domain name and user/group name. Asterisk (*) wildcard can be used.

   When fields are filled by clicking the **Search** button search in desired category is invoked.Select the desired users/groups in the search results and click **OK**.

3. The selected user/group appears in the left pane. Select the user/group to manage its ArchiveWeb permissions in the right pane.

4. List of roles on the right is split into sections. Exchange Archive features are listed under **Exchange roles**, search features under **Search roles** etc. Further, each role can be allowed/denied on global level or on individual archive server level. Permissions which are set manually are highlighted in blue. Inherited permissions are highlighted in yellow. (More information on permission hierarchy find at the beginning of this chapter.)

To remove users/groups:

1. Click the *Remove users or groups* symbol ( ) in the left pane.
2. In the **Remove users or groups** pop-up dialog select users or groups you'd like to remove.
3. Click **OK**.

Allow all ( ) and **Deny all** ( ) roles buttons on the bottom of the page can allow/deny all global roles for a user. To add user/group to the list, click the *Find users or groups* icon ( ). Click the **Reset to default** ( ) symbol to reset all user permissions to default. For the list of default permissions see *Addendum / List of default ArchiveWeb permissions*.

Permissions list

The table below lists default user's ArchiveWeb permissions. They are managed under **Roles** and **Permissions**.

	Role	Default value
Auditing	Show auditing logs	Denied
Auditing	Export auditing logs	Denied
Auditing	Apply tags	Denied
Auditing	Access all mailboxes	Denied
Auditing	Export results to ZIP	Denied
Auditing	Auditor access	Denied
Compliance	Allow policy managed download	Denied
Compliance	Compliance management	Denied
Exchange	Set "Legal Hold" flag	Denied
Exchange	Show "Legal hold" flag	Denied
Exchange	Show lost data	**Allowed**
Exchange	Compare mailbox with archive	**Allowed**
Exchange	Apply tags	**Allowed**
Exchange	Add comments to mails	Denied
Exchange	Show comments	Denied
Exchange	Delete item	Denied
Exchange	Restore items	Denied

Exchange	Show own mailbox	**Allowed**
Exchange	Show shared mailbox	**Allowed**
Exchange	Show public folders	**Allowed**
File	Set "Legal Hold" flag	Denied
File	Show "Legal hold" flag	Denied
File	Apply tags	**Allowed**
File	Compare file system with archive	Denied
File	Find files without shortcut	Denied
File	Add comments to files	Denied
File	Show comments	Denied
File	Delete files	Denied
File	Restore files	Denied
File	Show files server	**Allowed**
Journaling	Access journal	Denied
Management	Extend retention time	Denied
Management	Configure Files servers	Denied
Management	File management	Denied
Management	Manage scheduler	Denied
Management	Search servers management	**Allowed**
Management	Logon in ArchiveWeb	**Allowed**
Retention	Approve retention change requests	Denied
Retention	Create retention change request	Denied
Search	Search mails	**Allowed**
Search	Search files	**Allowed**
Search	Save search result to database	**Allowed**
Search	Export to mailbox	Denied
Search	Export to PST	Denied
Search	Export to ZIP	Denied
Search	Delete saved result	**Allowed**
Statistics	Mails - Show statistics	Denied
Statistics	Files - Show statistics	Denied
Statistics	Export statistics	**Allowed**

Auditor Access

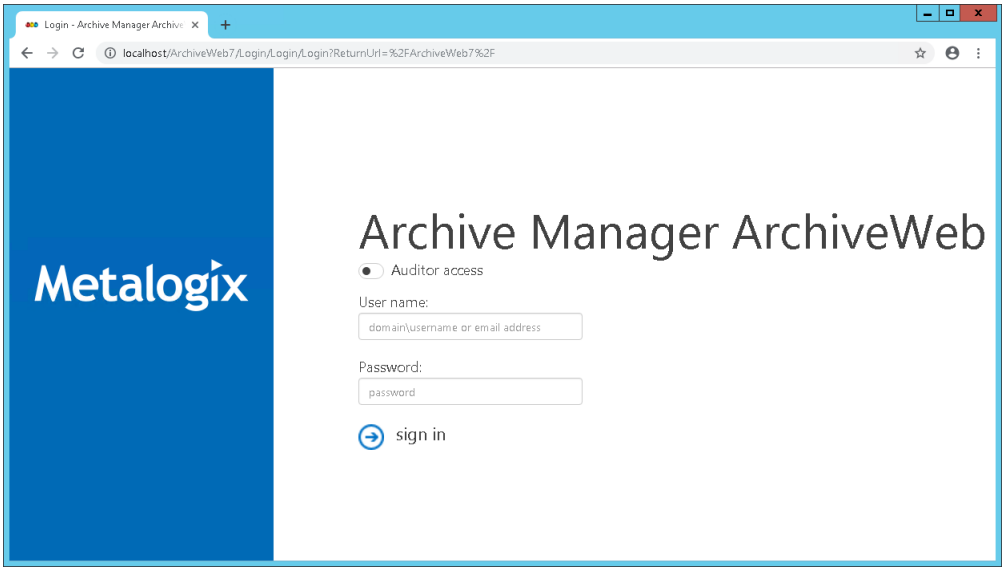
Journals in Exchange Server are used to enforce legal, regulatory, and organizational compliance in organizations by recording all or targeted email messages. In addition to journals, mailbox audit logs are also used to track who logs on to the mailboxes in your organization and what actions are taken by delegate users.

Auditor Access grants users the ability to view all mailbox journals that are imported, audit logs, retentions and search. Use this powerful feature with discretion.

To use this feature you must grant **Auditor access** permissions to at least two users. The two-user authentication mechanism works as follows: If John wants to log in as an auditor, he must have the **Auditor access** permission, and he must able to specify the user name of another user who has the **Auditor access** permission, before he can successfully log in as an auditor.

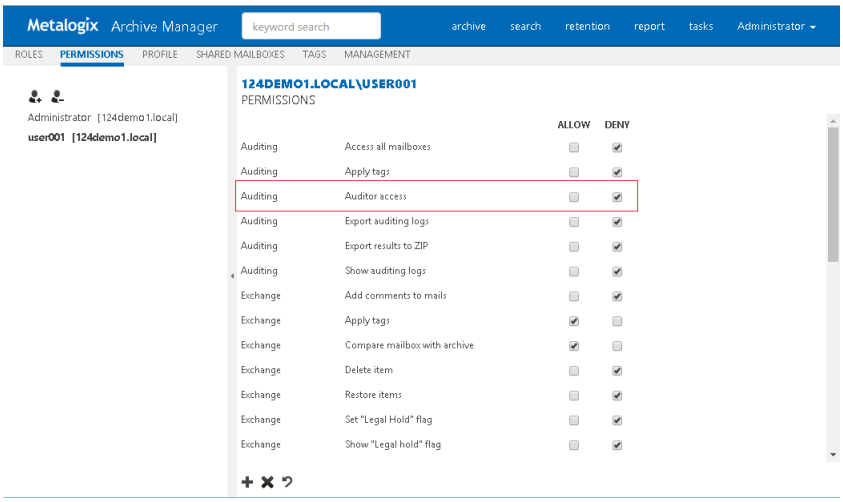
Steps to grant the Auditor access permission to a user

1. Log in to Metalogix Archive Manager ArchiveWeb with the credentials of a user who has the ability to grant permissions to other users.



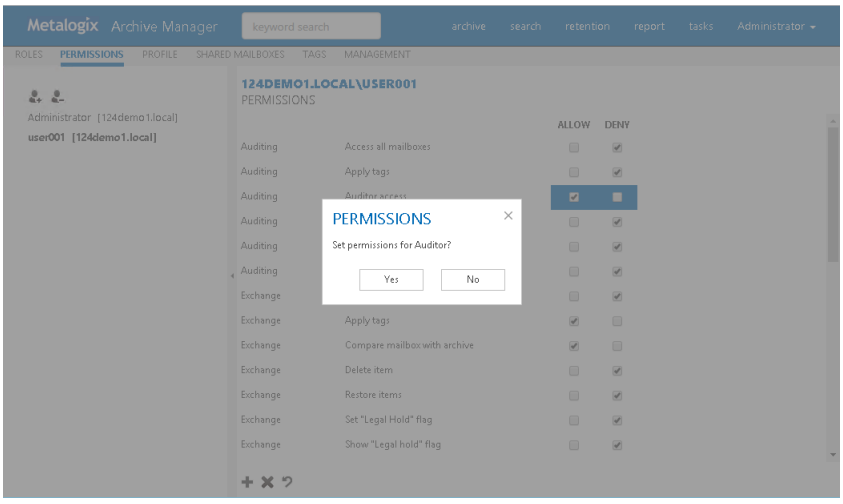
2. From your account name drop down, select **Manage Settings**.
3. Select the **Permissions** tab.
4. Click the **Add User** icon and locate the user from the **Find Users or Groups** search window.
5. Select the user from the user list on the left to display the permission set in the right-hand pane.
6. Select the check box for **Auditor access**.

NOTE: No user is granted this permission by default. As a result auditor access is denied to all users including the super-user.



7. In the confirmation dialog that appears, click **Yes** to grant the **Auditor access** permission.

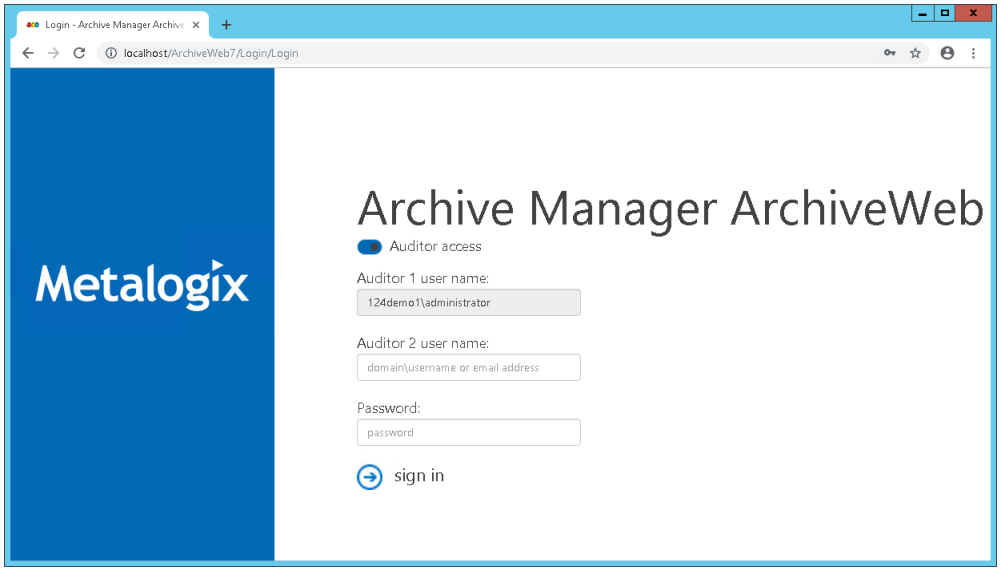
NOTE: Granting the **Auditor access** permission automatically grants all permissions of type **Auditing**.



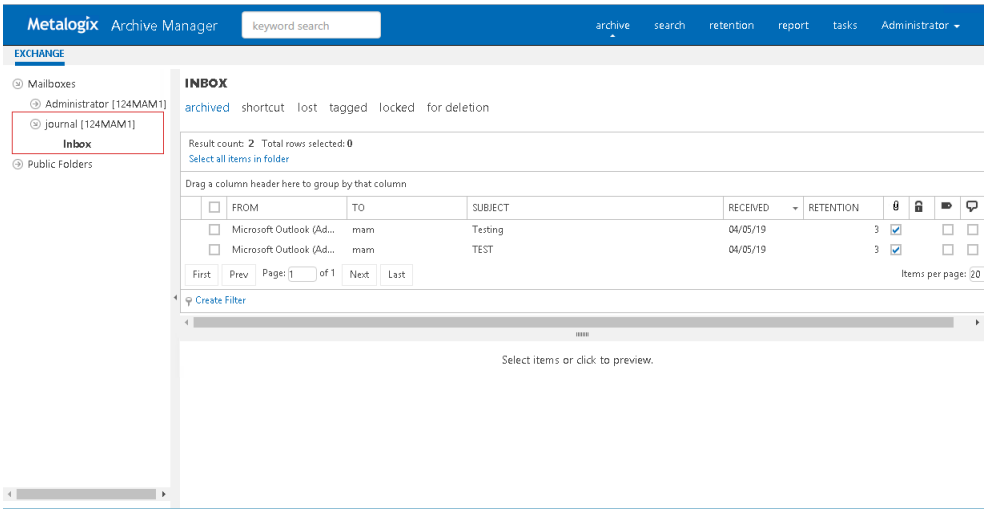
8. Repeat the above steps to grant the **Auditor access** permission to at least one or more users as needed.

Steps to log in as an auditor

1. If you have the **Auditor access** permission, enter your user name and password in the ArchiveWeb log in page.
2. Toggle the **Auditor access** button to turn on the feature. Notice that the user name field label changes to **Auditor 1 user name**. This is the account that will be used to log in as an auditor.
3. Click **sign in**. The **Auditor 2 user name** field appears.



4. Enter the user name of another user who has the **Auditor access** permission.
5. Click **sign in** again.
6. If the two-user authentication succeeds, the Metalogix Archive Manager workspace appears.
7. From the top bar, click **archive** to open the archive view.
8. Click the **Exchange** tab.
9. Expand the **Mailboxes** node and select a journal to view its contents.

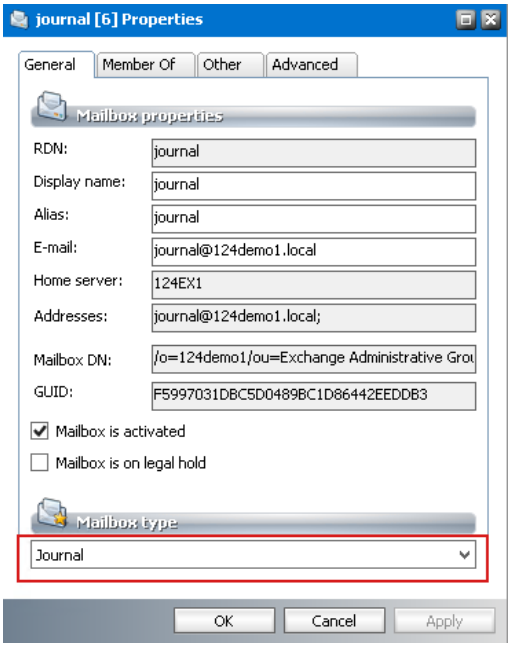


NOTE: If you have added a journal mailbox but cannot see its contents, check the **Mailbox type** property of the mailbox.

To specify a journal type mailbox follow the steps below:

1. Select the journal mailbox, and right-click to open the context menu
2. From the context menu select **Properties** to open the Properties window.
3. In the **General** tab, locate the **Mailbox type** property.

4. Set this value to **Journal** by selecting the value from the drop down.
5. Click **OK** to confirm the change and return to the mailbox.



Profile

The **Profile** page helps you set the display preferences of logged in users.

In this topic:

- Steps to open the Profile page
- Steps to set global defaults
- Steps to customize the profile

PROFILE HOMEPAGE

- Homepage

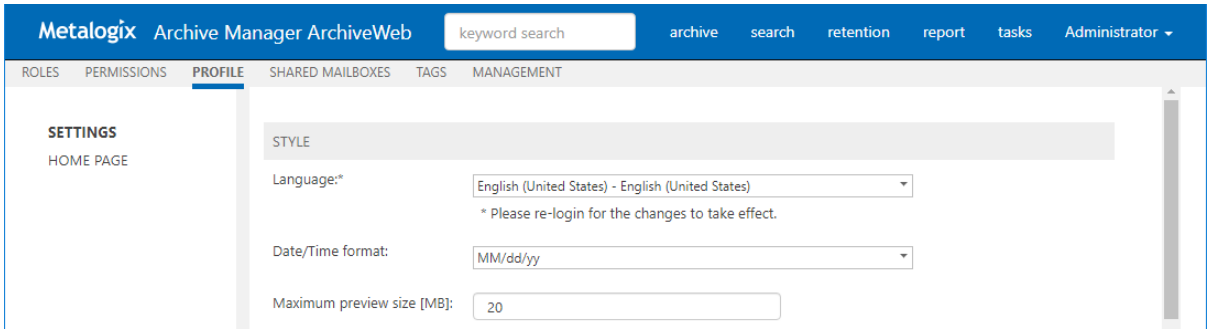
PROFILE SETTINGS

- Style settings
- Tasks settings
- Search settings
- Treeview settings
- Grid settings
- File settings

- File Management settings
- Audit settings

Steps to open the Profile page

1. Log in to ArchiveWeb.
2. Click your username from the top-left corner.
3. Select **Manage settings** from the drop down.
4. Click **Profile** from the local menu bar and click **Settings**.



Steps to set global defaults

To create a default profile:

When the administrator or super-user changes the default settings and Home page choices the administrator must click **Set as default** at the bottom-right of the page. These settings will be updated in the database as serves as the most current default settings.

To set a default profile for all users:

When a default profile exists, click **Set default values for all users** at the bottom- right of the page. By clicking this button all user profiles stored in the database will be replaced by the latest default settings. For users who do not have a stored profile, the latest default profile will be used. Personalized shared mailboxes and tags stored in the user's profile will not be replaced.

Steps to customize the profile

To customize a personal profile:

When a user makes changes to the settings or Home page tabs, the user must click **Apply changes** at the bottom-right of the page, to save the customized profile in the database.

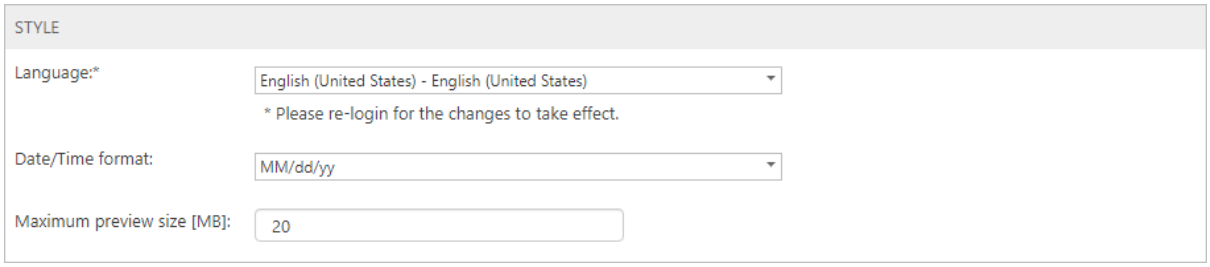
To reset a profile:

The user can click **Reset** at the bottom-right of the page, to replace their profile with the latest default profile from the database. Personalized shared mailboxes and tags stored in user's profile will not be replaced.

Home Page

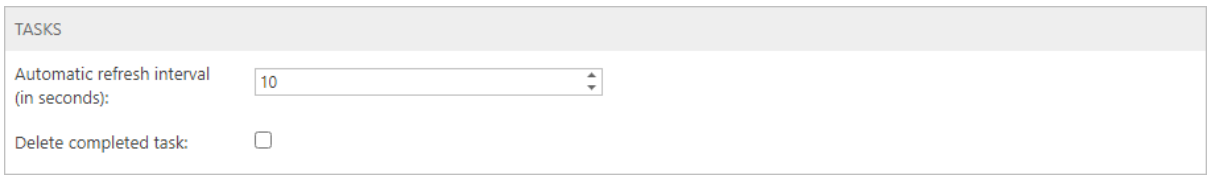
Under the Home Page node select which page should be displayed after you log in to ArchiveWeb.

Style settings



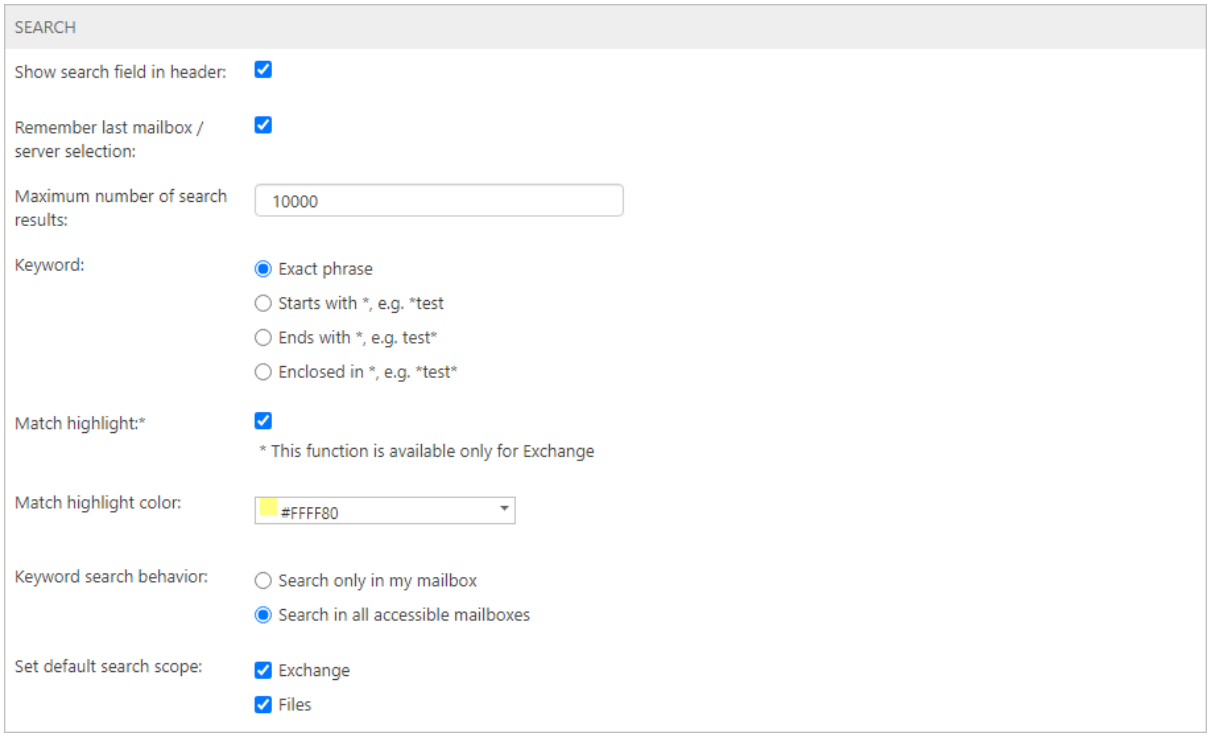
- Under Language select the desired language for the application (The default language depends on the Windows local setting of the Archive Manager server.) NOTE: For this change to take effect, re-login is required.
- Date/Time format - select you preferred date and time format for the whole UI; default value depends on regional settings of your machine and the language selected in the Profile; when profile language is changed, date/time format is changed accordingly
- Maximum preview size [MB] – sets maximum file size that can be opened in a preview-pane. Displaying large item (with size more than 20MB) can cause out-of-memory exception. Default value is 20 MB.

Tasks settings



- **Automatic refresh interval** (in seconds) - determines how often the *Tasks* list will be refreshed. Setting small intervals may cause performance issues. The default interval is 10 seconds.
- **Delete completed task** - select this check box to automatically delete completed task which do not return a value like database tasks such as *Add/Remove Tag*, *Set/Unset legal hold flag*, *Mark for deletion* and *Extend retention time*. If the check box is not checked all completed tasks will be listed.

Search settings



- **Show search field in header** - select this check box to display the keyword search field in the page header. Clear this check box to hide the keyword search field in the page header. The Administrator can permanently hide the keyword search in the page header by adding the `ShowTopSearchPanel` key in the **Web.config** file. The default folder is `C:\Program Files (x86)\Metalogix\ArchiveWeb`.

  ```
  <appSettings>
      ...
      ...
     <add key="ShowTopSearchPanel" value="false"/>
  </appSettings>
  ```

  When the key value is set to false, the **Show search field in header** setting will not be available in the **Profile** page and users will not be able to display the keyword search field.

- **Remember last mailbox / server selection** - If this check box is checked, and *Metalogix Archive Manager for Exchange* is installed, all mailboxes that were selected in the previous search operation are selected by default in *Search* > *Mailboxes* for subsequent search operations as long as the user has permissions to search those mailboxes. If the check box is not checked the user must select the mailboxes before a search operation. If this check box is checked, and *Metalogix Archive Manager for Files* is installed, all servers that were selected in the previous search operation are selected by default in *Search* > *Servers* for subsequent search operations as long as the user has permissions to search those servers. If the check box is not checked the user must select the servers before a search operation.

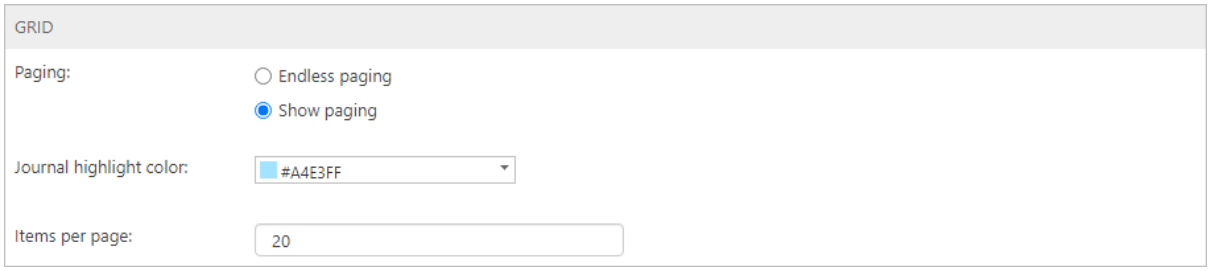
- **Maximum number of search results** - determines the maximum number of search results are returned from a search.

- **Keyword** - choose a wildcard format to use with the keyword search.
  - **Exact phrase** - no wildcards are added. The user can add a wildcard manually if needed.
  - **Starts with *** - A wildcard is added at the beginning of a keyword e.g. *sunshine
  - **Ends with *** - A wildcard is added at the end of a keyword e.g. sunshine*
  - **Enclosed in *** - A wildcard is added at the beginning and end of a keyword e.g. *sunshine*
- **Match highlight** - Select this check box to highlight the search phrase in the search results. Available only for *Metalogix Archive Manager for Exchange*.
- **Match highlight color** - color picker to choose a color for the highlight.
- **Keyword search behavior** - sets the default **Search scope** for keyword search setting in the *Search* tab only for *Metalogix Archive Manager for Exchange*. Choose from the following options:
  - **Search only in my mailbox** - by default only the logged on user's mailbox is pre-selected for a keyword search operation.
  - **Search in all accessible mailboxes** - by default all accessible mailboxes are pre-selected for a keyword search operation.
- **Set default search scope** - Choose the default search scope for keyword search.
  - **Exchange** - allows you to search in archived emails. Available if *Metalogix Archive Manager for Exchange* is installed.
  - **Files** - allows you to search in archived files. Available if *Metalogix Archive Manager for Files* is installed.

Treeview settings

Maximum text length - the Treeview's node text will be trimmed to the number of characters specified.

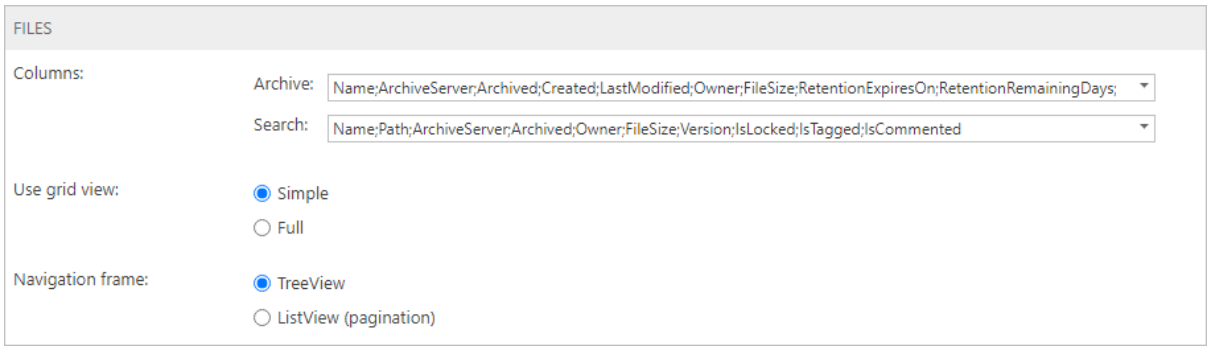
Grid settings



- **Paging** - select **Endless paging** to display all items on one page. Select **Show paging** to limit the number of items on one page.

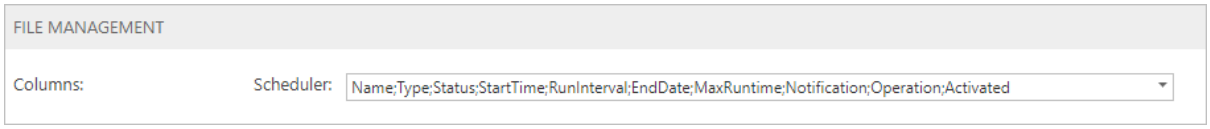
- **Journal highlight color** - choose a color from the color picker control to highlight the journal items.
- **Items per page** - If **Show paging** is selected, set the number of items to be displayed per page This number applies to the **full grid view**.

File settings



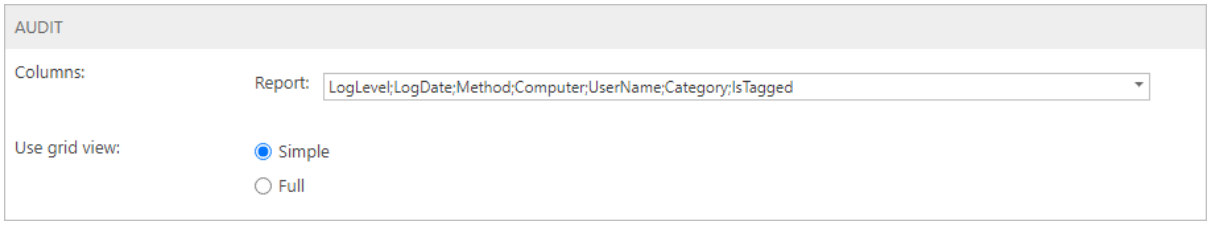
- **Columns** - sets the columns and the order that they are displayed in a list.
  - **Archive** - These column headers are used in the Archive page: *Select All, Name, Server, Archived date, Created date, Last modification date, Owner, File size, Retention expiry date, Retention remaining day, Retention from, Locked, Tagged, Commented*
  - **Search** - These column headers are used in the Search results page: *Select All, Name, Folder, Server, Archived date, Owner, File size, Version, Locked, Commented*
- **Use grid view** - allows users to set the list view type.
  - **Simple** - (default grid type) Select this option so that list operations such as custom filters, sorting and ordering are performed on items currently displayed in the list as defined by the **Items per page** option in the *Grid* settings or in the table itself (see the List view conventions section). Using **Simple** grid dramatically improves the list performance especially when working with a large number of items. **Simple** grid can be used only for *Archive* views.
  - **Full** - Select this option so that list operations such as custom filters, sorting and ordering can be performed on the entire data set of the list irrespective of limits defined by the **Items per page** option in the *Grid* settings. This option is not recommended for huge data sets. **Full** grid can be used in Auditing and Search result lists.
- **Navigation frame** - allows users to display the folder structure in following formats:
  - **TreeView** - (default). Displays file folders in a hierarchical order. Recommended for most folder structures that are not loo large.
  - **ListView** - presents file folders with pagination. Recommended for large folder structure in excess of 10,000 folders. The pagination improves navigation performance.

File Management settings



- **Columns** - sets the columns and the order that they are displayed in a list.
  - **Scheduler** - These column headers are used in the Archive page: *Select All, Name, Type, Status, Start time, Run interval, End date, Maximum runtime, Notification, Operation, Activated*

Audit settings

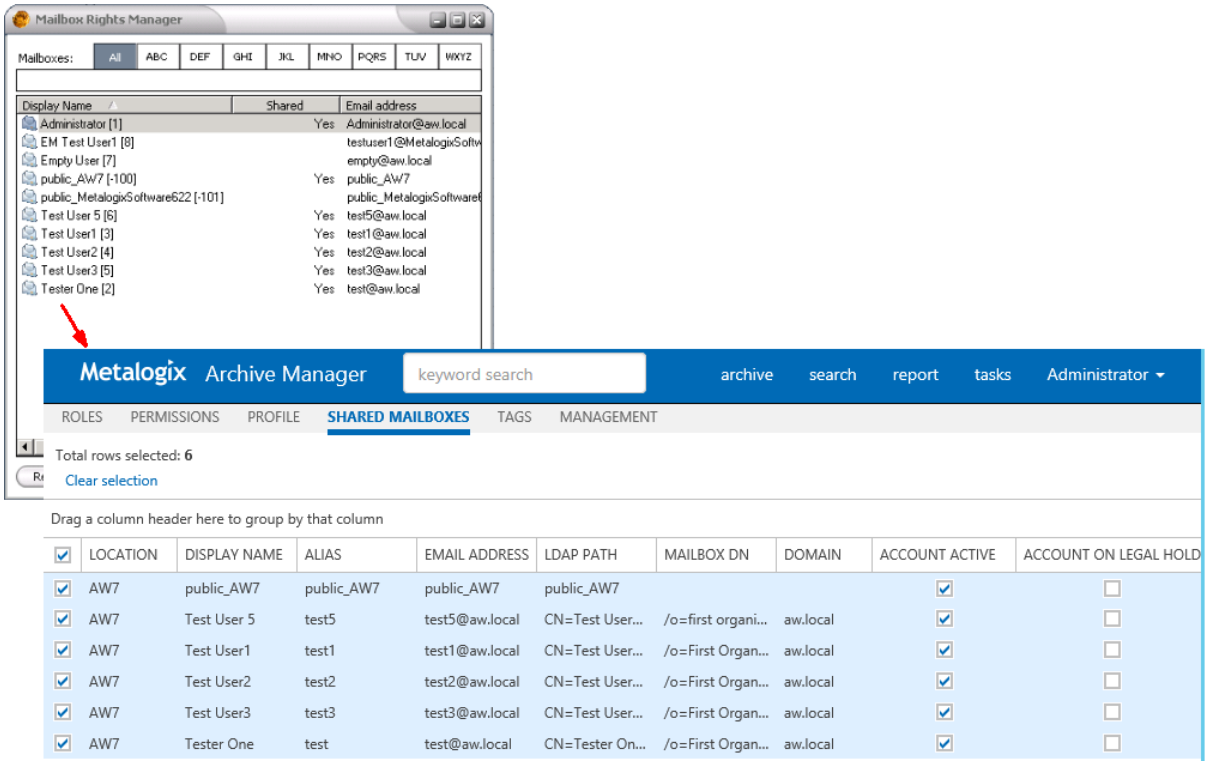


- **Columns** - sets the columns and the order that they are displayed in a list.
  - **Report** - These column headers are used in the Archive page: *Select All, Log level, Log date, Method, Computer, User, Category, Tagged*
- **Use grid view** - allows users to set the list view type.
  - **Simple** - (default grid type) Select this option so that list operations such as custom filters, sorting and ordering are performed on items currently displayed in the list as defined by the **Items per page** option in the *Grid* settings or in the table itself (see the List view conventions section). Using **Simple** grid dramatically improves the list performance especially when working with a large number of items. **Simple** grid can be used only for *Archive* views.
  - **Full** - Select this option so that list operations such as custom filters, sorting and ordering can be performed on the entire data set of the list irrespective of limits defined by the **Items per page** option in the *Grid* settings. This option is not recommended for huge data sets. **Full** grid can be used in Auditing and Search result lists.

Shared Mailboxes

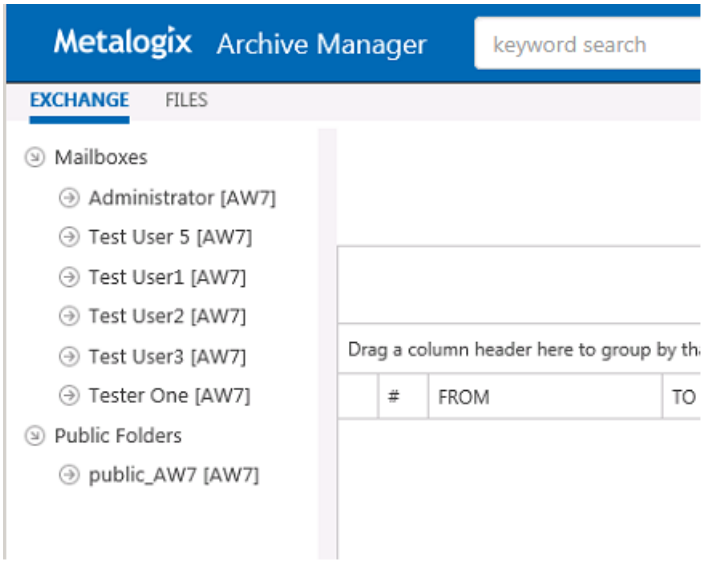
This management setting is available only when Archive Manager for Exchange is installed and configured for ArchiveWeb.

When shared mailboxes are set for a currently logged user in Archive Manager for Exchange -> Tools -> Mailbox Rights Manager the grid will be populated and a user can select which mailbox(es) the user likes to be listed in Archive's mailboxes tree and in searchable mailboxes.

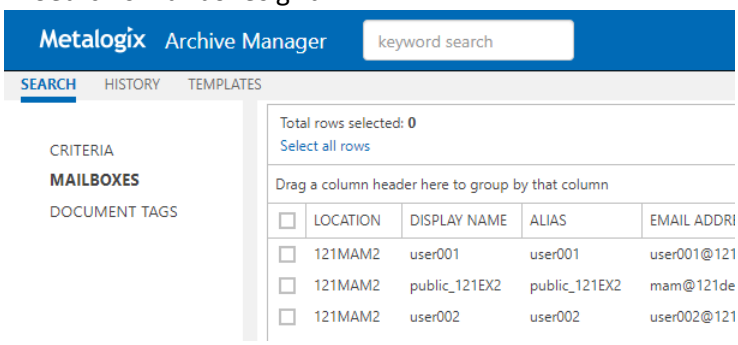


User can manage list of available shared mailboxes, select which ones like to use:

- In Archive's mailboxes tree



- In Search's mailboxes grid



Tags

In ArchiveWeb, user can sort emails and documents by adding various tags to them. Tags are logged-on user defined categories. They help the logged-on user quickly find and distinguish emails/documents of one category e.g. important emails, documents regarding one particular event etc.

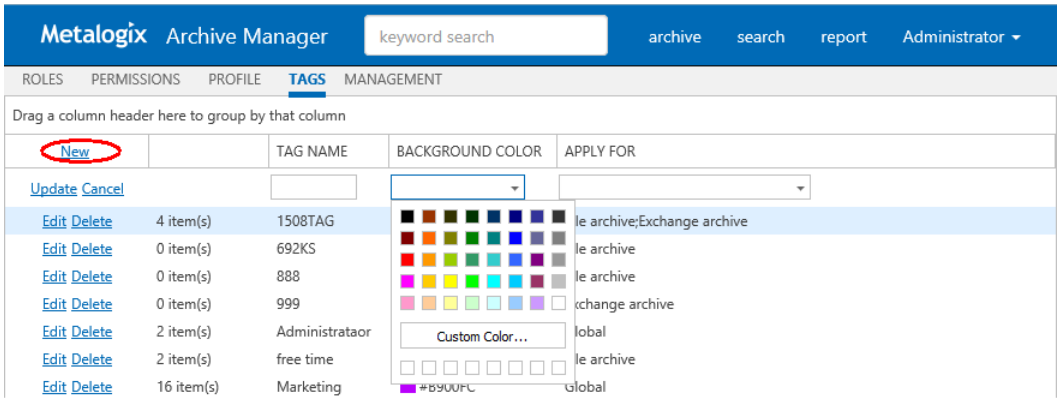
All tags are listed, edited or deleted under **Manage settings**/**Tags** tab. At first we describe how to create tags. Then the process of adding tags to emails/documents is illustrated.

When you click on the **Tags** tab for the first time, no tags are created. The list view is empty. To create a tag click the ***New*** option in the list header. A new row will be added in the list view. You simply specify desired tag properties in the available text boxes:

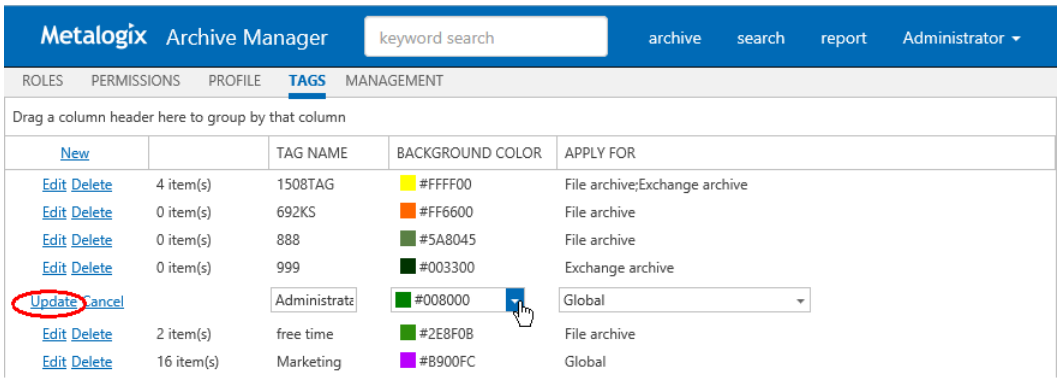
- **Tag Name** – enter descriptive name, e.g. "Personal", "Marketing" or any other
- **Background Color** – select the tag color or specify your *Custom color*
- **Apply For** – tag can be available globally or can be applied only for specific section of ArchiveWeb – Exchange archive, Files archive, Auditing etc. Should you check the e.g. Files archive option, the tag will be available only for File archive items

When all settings have been configured, click the ***Update*** option.

NOTE: Not all **Tagged items** tab functions may be available for the logged-on user. The functions must be allowed for the user. For more information see the **Roles** and **Permissions** sections.



The tag will be added to the list of tags. Naturally, all tag attributes can be edited by clicking the ***Edit*** option for the given tag. When finished, click ***Update***.



The list view also informs you on the number of items tagged by the given tag.

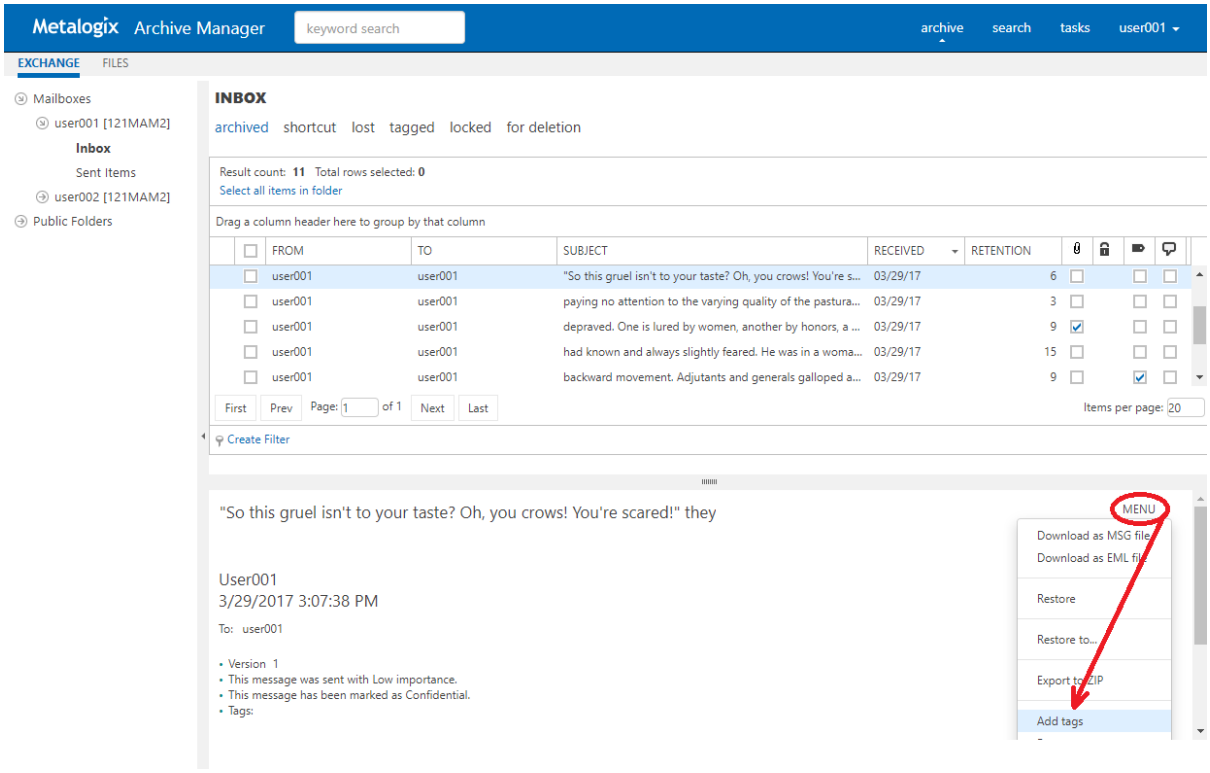
Adding tags to items

After the tag was defined, it can be added to:

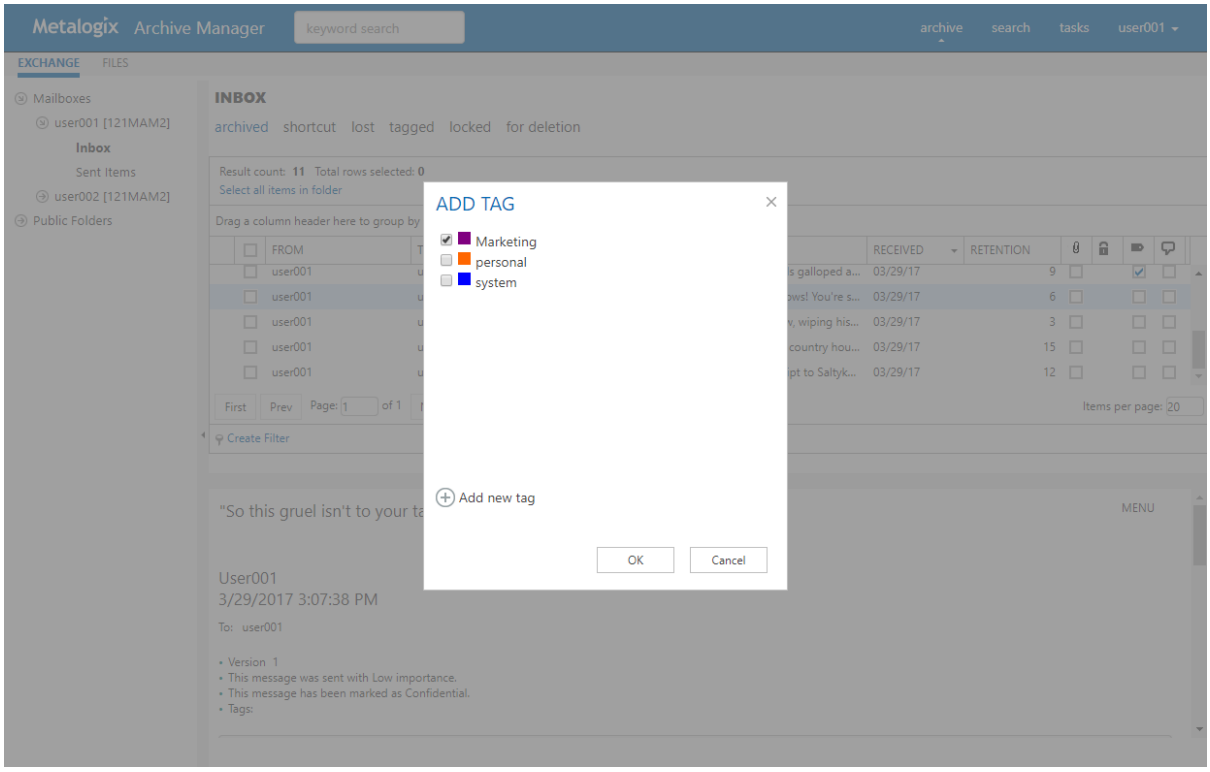
- emails (in any mailbox folder or in a public folder)
- document
- auditing item

NOTE: Tag can be applied to all three type of items, if it is defined as a global tag (default). Otherwise it can be applied only to selected type of items (see above).

To apply the tag, locate the desired item under Archive/Exchange or Archive/Files or Report/Auditing tab and select it. Then open the **More actions** link (MENU) from the right upper corner in the preview pane. In the **More actions** menu click **Add tag(s)** command.

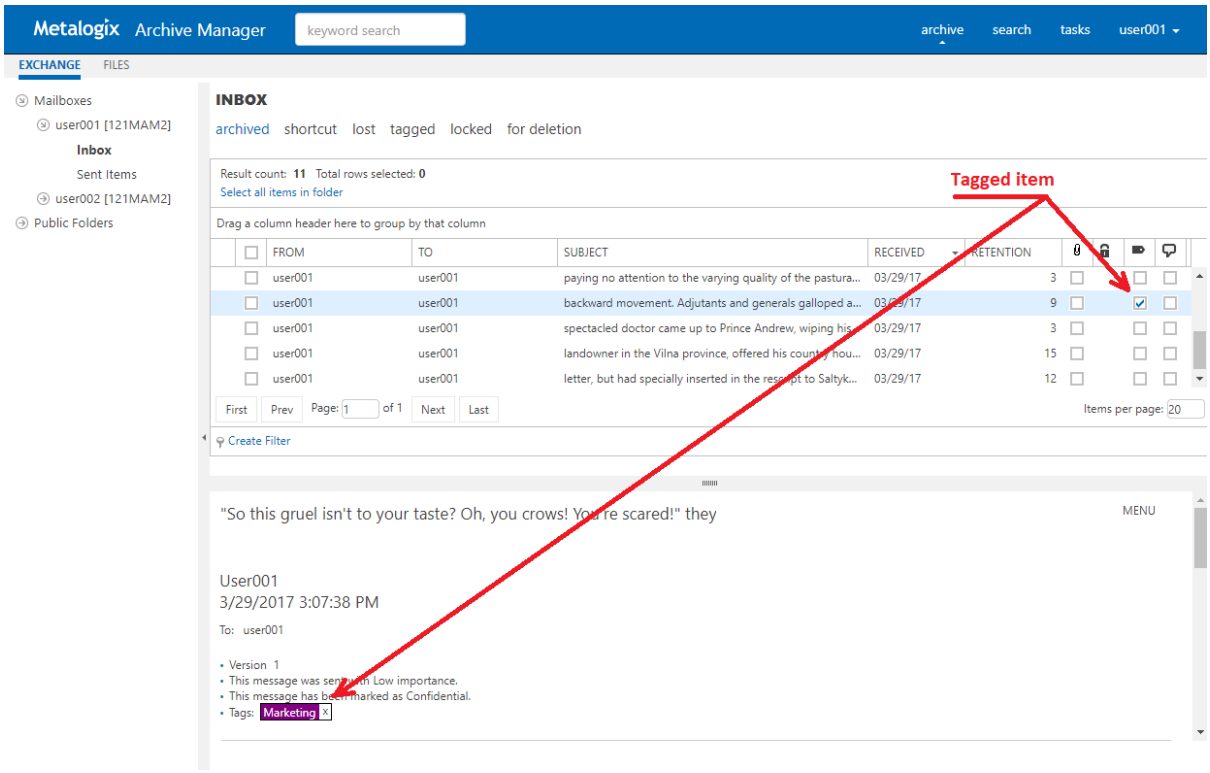


In the pop-up window select the tag(s) which you want to add to the item and click **OK**.



NOTE: You can also create a new tag if you click the **Add new tag** option and click **Add**. The *Add New Tag* dialog appears where a new tag can be defined.

Once the tag has been added to the items, it will be visible in the emails/documents list view (see the screenshot below) and also in the preview.
A tag can be removed in the preview or via the **More actions** link (MENU) by clicking the **Remove tag** command.



Management

Management section constitutes centralized dashboard where user with appropriate permissions can manage specific configuration settings in the following sections:

- File Management

  Adding, editing and removing of Archive Manager for Files servers which together establish the file archive system. Additionally, with Scheduler capabilities, Archive Manager for Files jobs are easily managed in the same way as on the Scheduler tab of the Enterprise Manager (Archive Manager for Files).

- Search Management

  Registering and managing search servers in the environment.

File Management

File management section under Manage Settings / Management is displayed only if Archive Manager for Files is installed and the appropriate permission is set for the user. This section allows managing Archive Manager for Files:

- **Archive Servers** - managing archive and retrieve servers
- **Scheduler** - managing scheduler jobs

Archive Servers

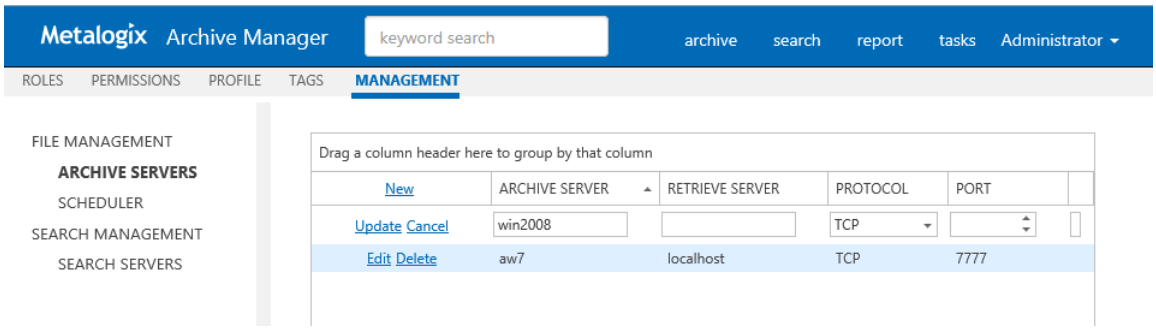
After clicking the **Archive Servers** tab, the available Archive Manager for Files servers will be listed in the main pane.

You can change the display name, protocol or port for the given server by clicking the ***Edit*** option next to the given server.

By clicking the ***Delete*** option the respective server will be deactivated in the ArchiveWeb, i.e. it will not be accessible for the users via ArchiveWeb and it will not be possible to search it either.

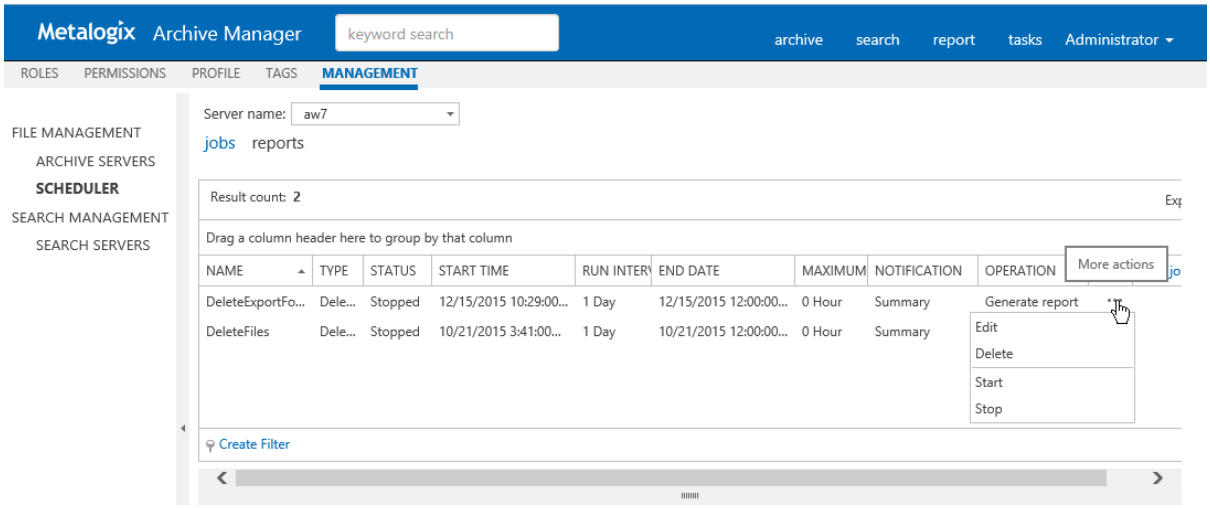
To add a new Archive Manager for Files server click ***New*** option in the list header. It will add new row to the list where you can specify the File Archive Server properties. Each server (*Archive Server*) can be **backed-up** when you enter another server with installed Archive Manager for Files as a *Retrieve Server*. The *Archive Server* folders and files will be accessible via ArchiveWeb even when the server is decommissioned/inaccessible. (For more information on this feature see the *"Alternate Access Servers"* document.)

Finally click ***Update*** for the newly added server. The new server will be listed on the **Files Archive tab**.



Scheduler

After clicking the **Scheduler** tab, you can manage Archive Manager for Files jobs or preview job reports on you Archive Manager for Files server. This tab basically offers the same functionality as the *Scheduler* tab of the Enterprise Manager (Archive Manager for Files).



Jobs

To manage jobs user has to select a server from **Server name** drop-down. If any job exists (ArchiveWeb currently supports only Delete jobs) for the specified server, the grid will be populated.

For each listed job, a More actions menu appears by clicking the More actions icon "..." on a respective row. This menu contains functions for **Edit**, **Delete**, **Start** and **Stop** the job.

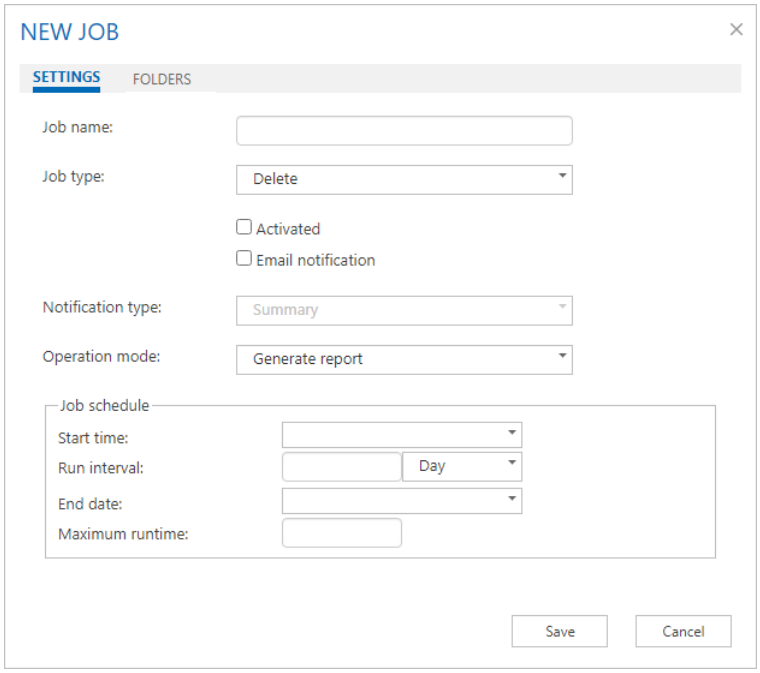
New job can be created by clicking ***New job*** link in the grid header.

Edit or new job pop-up window is the same (see below) and contains two tabs:

Settings - contains job description information

Folder - defines folders that will be affected by a job

NOTE: For job to process data, folders must be specified.



Settings tab

Job name - enter name for the job

Job type - in the drop-down select the desired job type (currently only Delete jobs are supported); for more information on job types see the *Archive Manager for Files Administration Guide*.

Activated - select the check box to activate the job.

Email notification - select the check box to send notifications about the given job as configured in the *Archive Manager Administration Center* on the Settings/Notification tab (for more information see the *Archive Manager for Files Administration Guide*)

Notification type - *Summary* or *Detailed* can be selected

Operation mode - this setting is available just for *Delete* job (and *Synchronization* job in the *Archive Manager Administration Center*)

Click on the Operation mode field. Then click on the down arrow and select the operation mode:

- Reporting mode - no action is being taken just a report is generated. This is useful as administrators first have a report on what is going to be done. The report can be checked and modified if necessary.
- Process report mode – files from the previously generated report are processed. Administrator is able first to check and modify the list of files going to be processed (i.e. deleted or synchronized)
- Process immediately mode – processing files without any report (not recommended)

The Report file field displays the path to the generated report (e.g.<installdir> \fsaPamLogs \sync \ sync.report).

Start time - specify the first day when the job should run

Run interval - specify how often the job should run

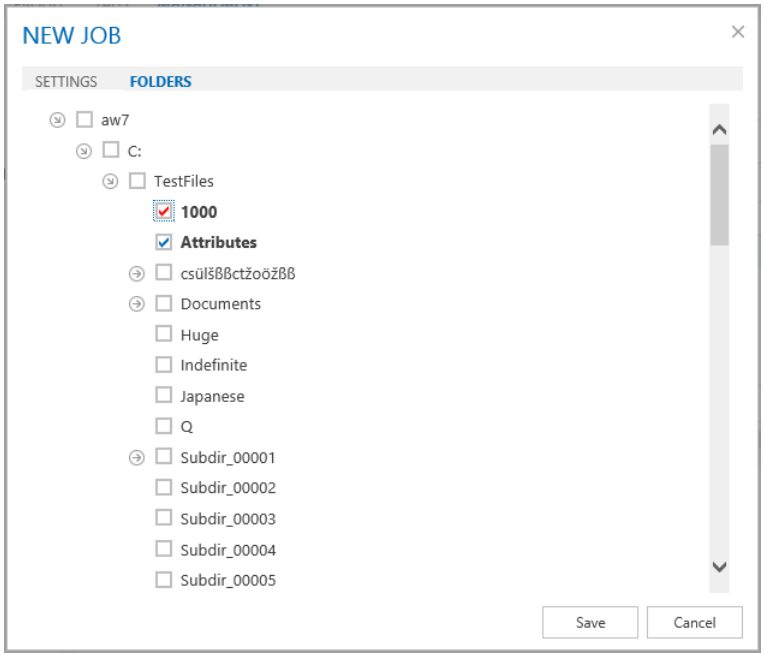
End date - specify the last day when the job should run

Maximum runtime - specify the maximum time (in hours) during which the job will be running

Folders tab

Job scope must be defined on the Folders tab. Folders for the job to process are selected by clicking in a respective check-box.

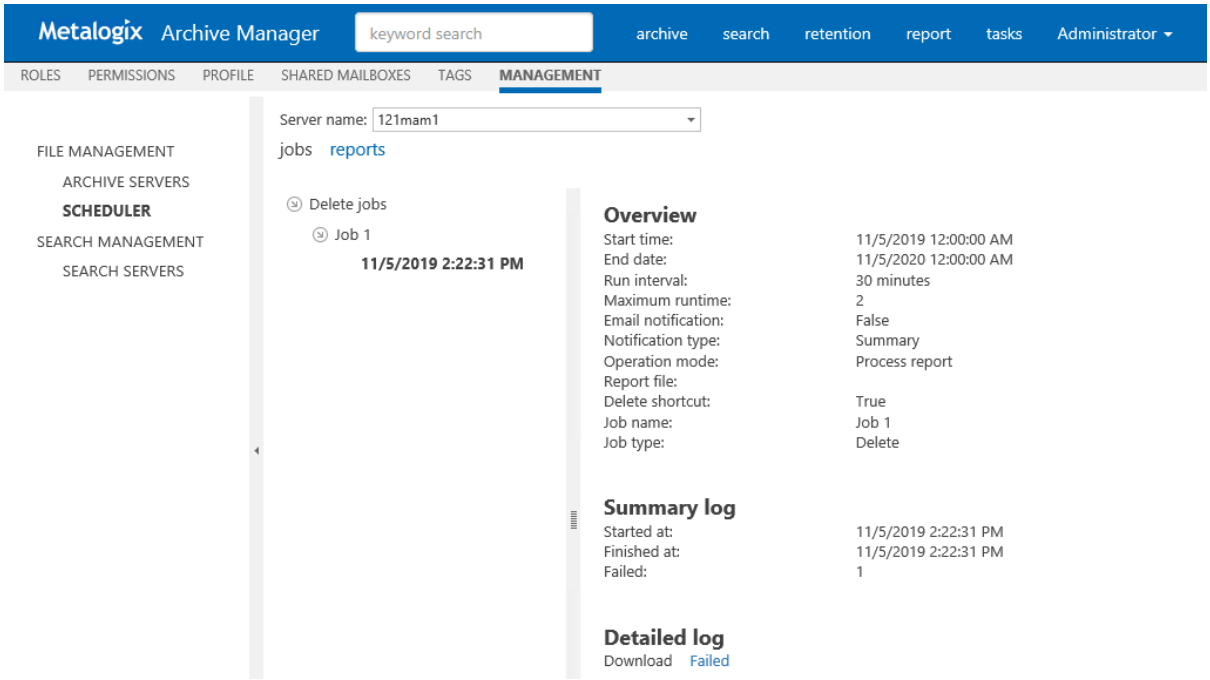
NOTE: Red check-box ( ) specifies that the folder will be processed recursively.



When all is configured as desired, click **Save**.

Reports

This section is a report viewer for jobs.



By selecting a job created/performed time the right pane will be populated by job's information

Overview – job description information

Summary log – information about running

Detailed log – contains links for download.

According to “Operation mode” (listed in overview):

- Generate report – list of items to be “Affected” by a job
- Process report – links to download “Succeeded” and if any “Failed” items

Search Management

Search Management section is displayed only if appropriate permission is set for the user. This section allows managing of Search servers installed in the environment. Specifying search servers on this tab is prerequisite of search functionality. With no search server defined, search is not available.

After clicking on the **Search servers** menu, the available Search servers will be listed in the main pane.
NOTE: If web.config file contains information about Search server(s) (this is applicable if upgrading from previous versions of ArchiveWeb) the list will be automatically populated.

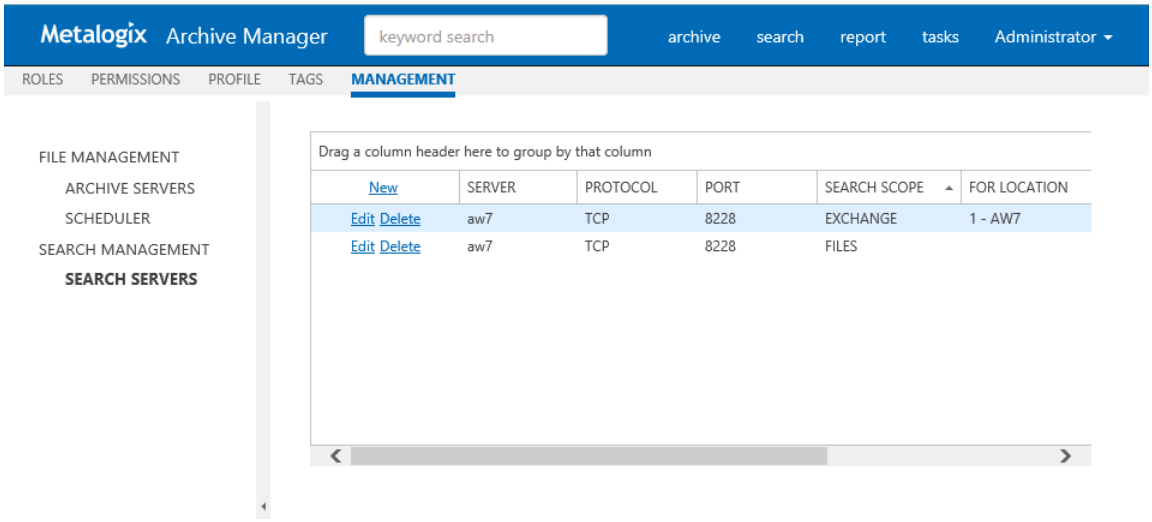
By clicking the **Delete** option the respective Search server will be removed, i.e. it will not be used for Searches.
To add a new Search server click **New** option in the list header. It will add a new row to the list where you can specify the Search server properties.
NOTE: Avoid using *localhost* as Server Name.

By clicking the **Edit** option next to the given server, you can change server properties. The ***Search Scope*** marks for which Archive Manager the given search server has been installed (Archive Manager for Files/Exchange).

For Location - this property is applicable only for Archive Manager for Exchange search servers. For a Search server you can specify a location which the respective Search server "covers" by selecting a location from a "FOR LOCATION" drop-down. This drop-down lists all locations defined in Archive Manager for Exchange in a location where the logged in user has active mailbox. (For more information on locations see the *Archive Manager for Exchange Administration Guide.*)

Provided there are more Archive Manager for Exchange locations in the environment and each has it own search server, the given search servers must be listed with correct location.

NOTE: Should there be more locations but only 1 search server for all, leave the ***For Location*** property blank.



Federated Search

If you're using more locations, you can setup a Search service for each location. Each Search service will index items on its location.

To setup Federated search (search over more search servers) in ArchiveWeb you have to modify the Search servers (Search Management) by specifying “FOR LOCATION” value.

Federated search allows you to collect results from more search servers in one search request. You can perform federated search over all available (according to permissions) search areas:

- Exchange
- Files
- Common

6

ArchiveWeb Interface and conventions

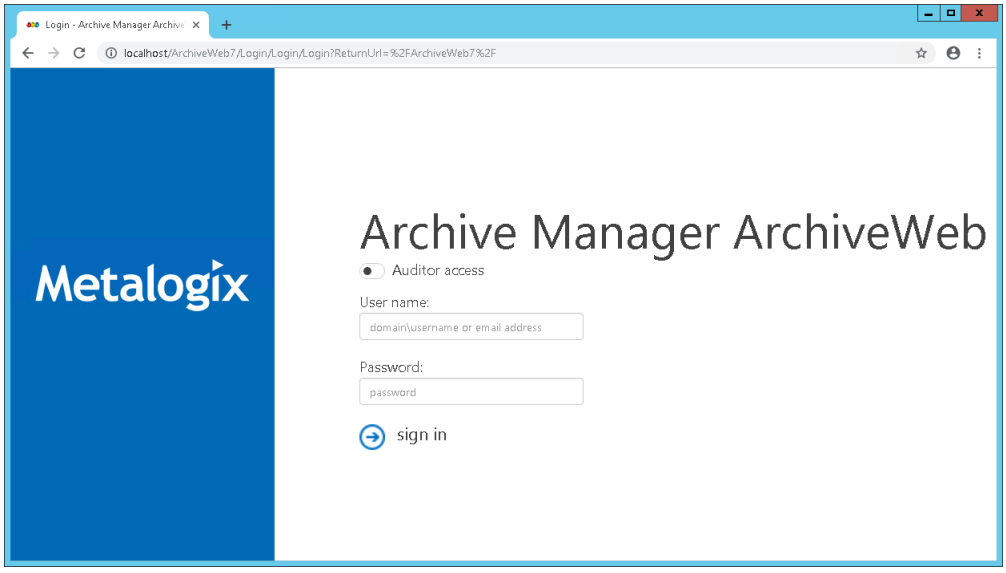
After browsing the ArchiveWeb URL (http://<ArchiveWebServerName>/archiveweb), the Login window gets displayed. Users are asked to enter their name (or “domain name\user name” or “email address”) and password. Email address should be:

- Office365 email address
- Active Directory Domain email address in format <name>@domain.com

Please note: johnSmith@ateam.com is equivalent to ateam\johnSmith.

Default language depends on the Windows local setting of the Archive Manager server.

NOTE: When Integrated Windows authentication is turned on, the login page is skipped and the logged-in user’s credentials are used. This is set in C:\Program Files\ Common Files\ PAM \ Web \ ArchiveWeb \ Web.config where <authentication mode = “windows”>.



After logging in correctly, the ArchiveWeb application opens. The top-page main bar contains search box (keyword searching in e-mail body, attachments, file content) and tabs – archive, search, report – representing the activated features of Archive Manager. Once you click one, the grey sub-bar under the main pane displays additional options.

Further, in the right upper corner you may see the logged on user. Click it to unfold the drop-down menu offering the following options:

- Manage settings option provides access to further settings based on user permissions:
- Log out option is to be used when logging off

After clicking Manage Settings, the following menu options appear on the displayed menu bar:

The Roles option is available if the user has necessary permissions. Under this option you can manage user/ArchiveWeb roles assignment based on roles (see the “Roles” section).

The Permissions option is available if the user has necessary permissions. Under this option you can manage user/ArchiveWeb roles assignment based on users (see the “Permissions” section).

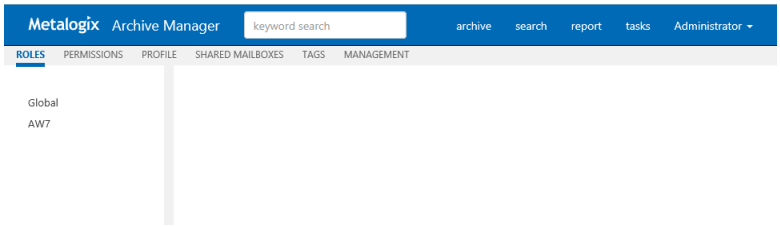
The Profile option allows you to adjust ArchiveWeb layout to your liking (see the “Profile Settings” section).

The Shared Mailboxes option is available only when Archive Manager for Exchange is installed and configured for ArchiveWeb.

When shared mailboxes are set for a currently logged user in Archive Manager for Exchange -> Tools -> Mailbox Rights Manager the grid will be populated and a user can select which mailbox(es) the user likes to be listed in Archive’s mailboxes tree and in searchable mailboxes.

Under the Tags option one can create tags for archive or auditing items (see the “Tags” section).

The File Management option is available if the user has necessary permissions. Under this option you can manage file servers and scheduled jobs (see the "File Management" section).



The Keyword search box in the upper part of the window was designed for fast and easy searching in archives - Archive Manager for Exchange archive as well as Archive Manager for Files archive. Enter the desired expression and click Enter.

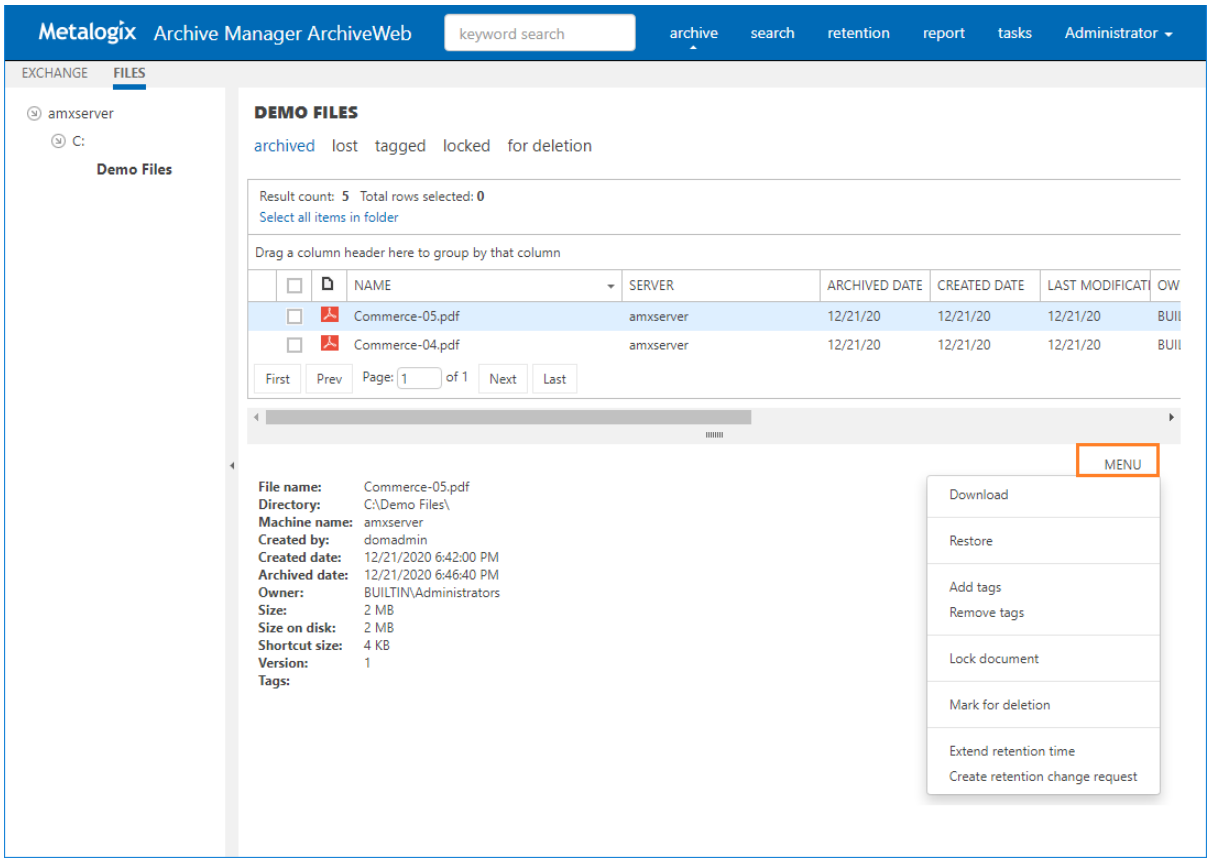
NOTE: Email attachments, email bodies and file contents are searched through only if Keyword search is installed.

List view conventions

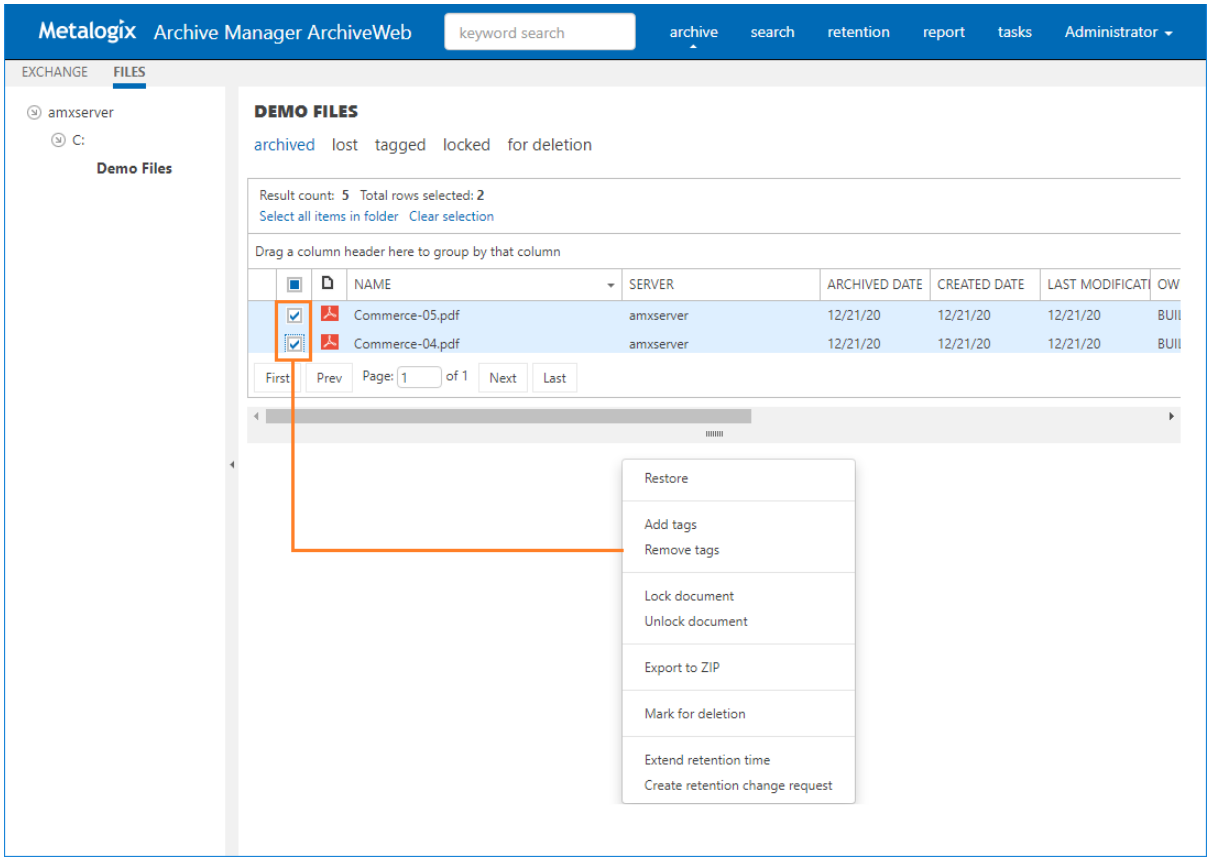
With advanced list view functionality provided with every ArchiveWeb list view you can easily search even in huge lists of items and adjust the list to your specific needs. List view functions are the same as for all ArchiveWeb lists. In the main pane you can switch between these types of items by clicking on the respective filter:

- archived - all folder archived items except items marked for deletion
- shortcut - archive items with shortcut in mailbox
- lost - archived items with no reference in mailbox/file system
- tagged - archived items with tag(s)
- locked - locked archived items
- for deletion - archived items that are marked for deletion, i.e. they will be deleted when their retention period expires (and delete job runs)

Preview (if available) of any item you click on appears below the list view. To open **More actions** menu for the item click the **More actions** link (MENU) on the right bottom below the list.
Pop-up preview feature is also available for Exchange, Files, Auditing and Search results items. When a user double-clicks anywhere in the item's line, the item opens in pop/up window full screen mode with all functionality as in normal view, such as multi/action menu (MENU), and comments area.



Check boxes are designed for multi-select. If MORE THAN ONE item is selected, **More actions** menu appears automatically below the list.



Batch selection/unselection of items is done by clicking the **Select all rows (Select all items in folder)/Clear selection** action links just above the list. When **Select all rows/Select all items in folder** action links are selected, operations are performed over all items in the given folder. (See more under "Simple Grid" section.)

It is also possible to change the column order by simple drag-and-drop action. Individual columns can be shown or hidden - these settings are managed in user profile after clicking **<UserName>** / **Manage Settings** / **Profile** in *Columns* section.

Further, lists can be:

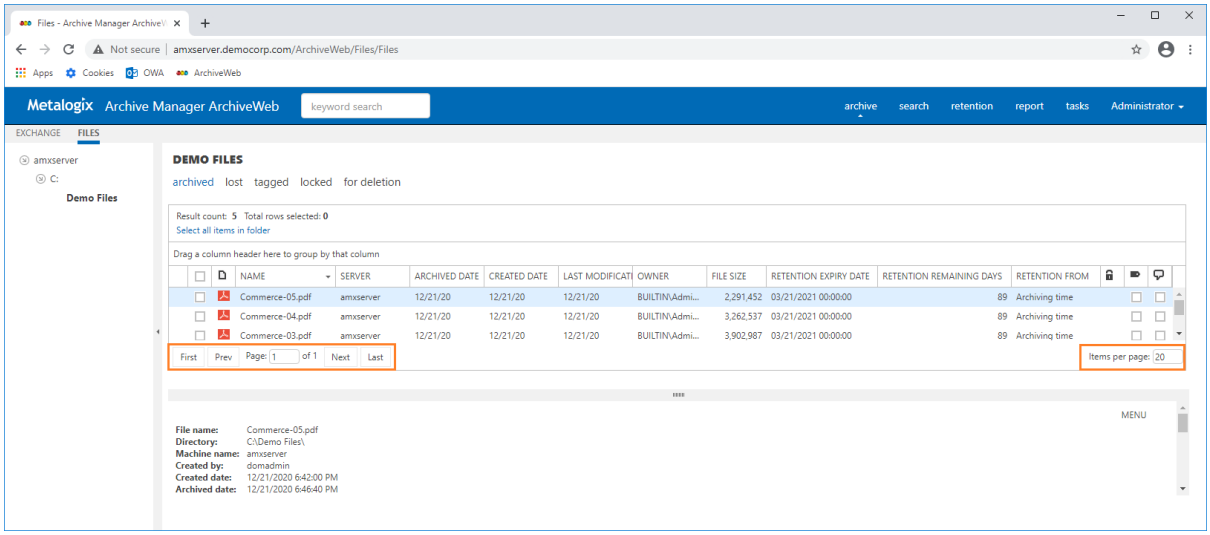
- **sorted** — Change the column sorting order by selecting the given column header and clicking its down/up arrow on the right (in case the arrow is not visible adjust the width of the column by dragging the line)

- **grouped** — Group table data by any column. To do so, drag the column header to the bar right above the table. Generated groups can be expanded by clicking the arrows next to them. As usual, the sorting order can be changed by clicking the little arrow in the dragged column header

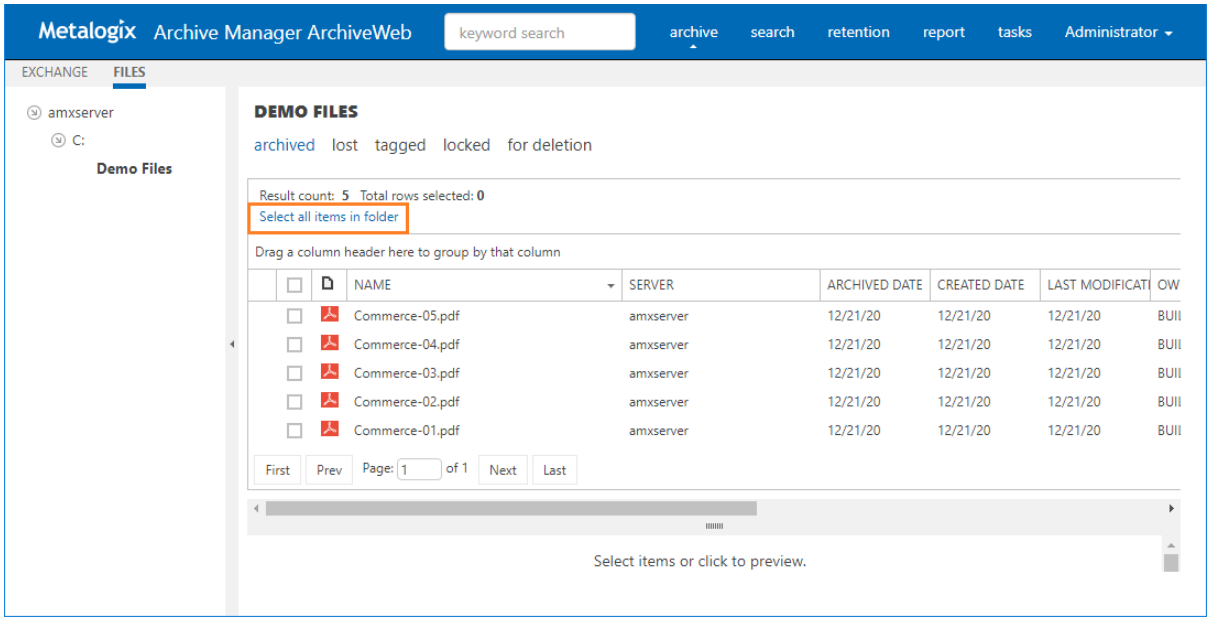
  NOTE: In case of SIMPLE grid (see the Profile settings section) Grouping apply just for items on the current page.

Simple Grid

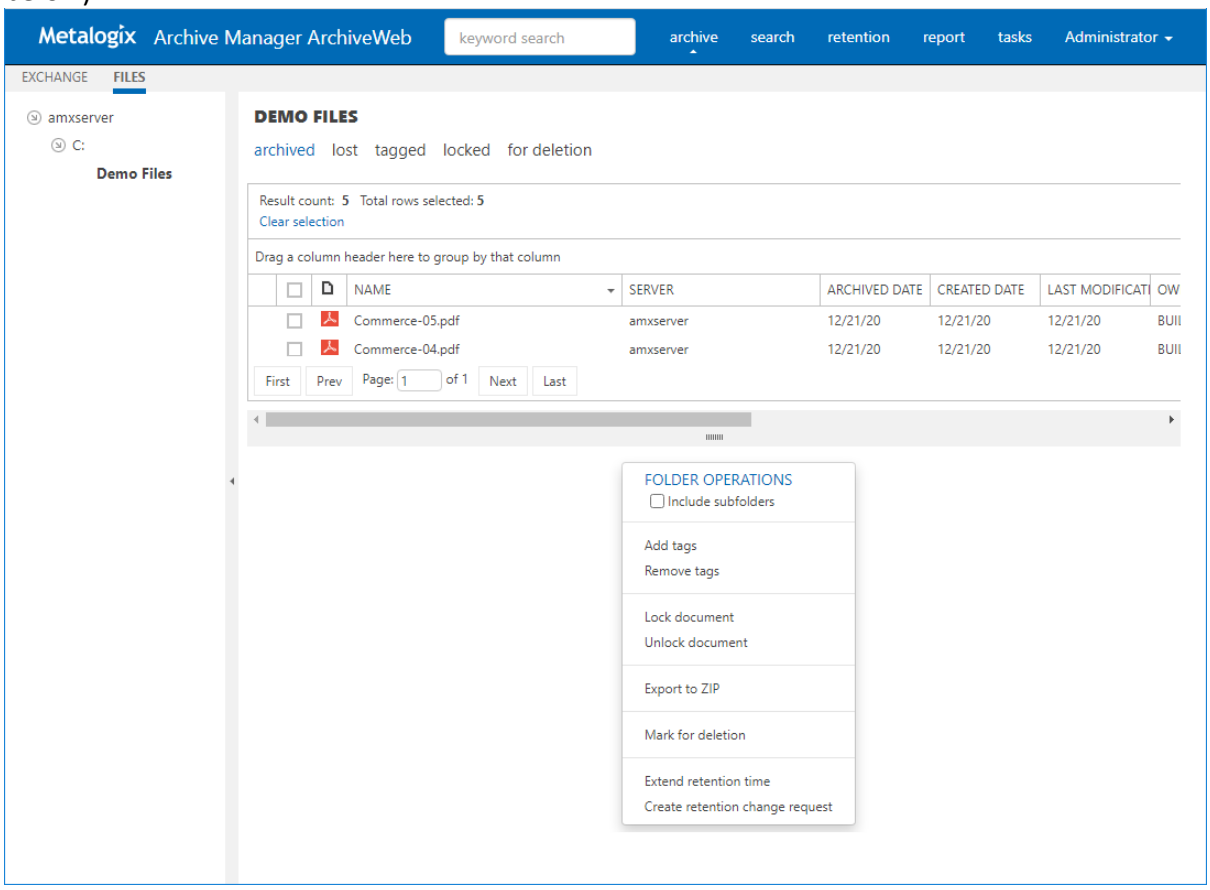
Simple Grid is specific type of grid available for Archive\Exchange, Archive\Files and Report\Auditing list view. It allows customization of the list view and offers some specific features for handling the list items as described further. *Simple Grid* option can be set under **<Logged-on User> / Manage settings / Profile / Settings**. When you select **Use grid view** / **Simple** option for the list view (e.g. for Exchange/Archive list view), the given list view will have page navigation controls and will allow user to set number of items to be displayed per page (Items per page) as shown in the screenshot below.



Asynchronous folder operations over folder are available for Simple Grid. Click the **Select all items in folder** link to perform operation over all items in a specified folder.
NOTE: The link does not appear on filter tabs such as “shortcut”, “lost”, “tagged”, “locked” and “for deletion”.

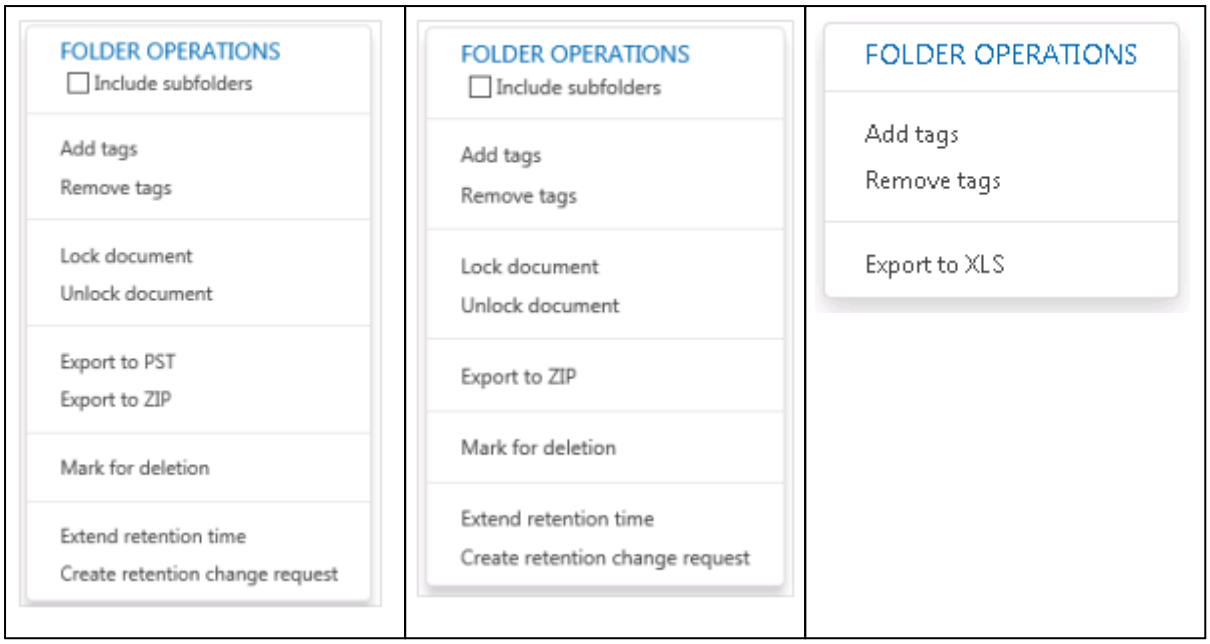


When a user clicks on the **Select all items in folder** link, the **Total rows selected** label will show the same number as **Result count** label shows. No item will be selected (see picture below).

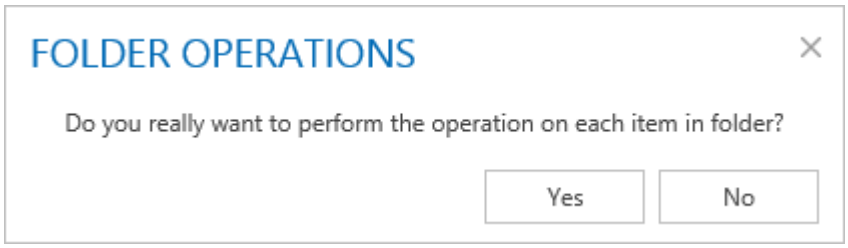


Additionally, the preview pane displays folder operations menu (according to user permissions) except "*Restore*" functions. ("*Restore*" operations are not allowed as folder operations.)

Exchange	Files	Audit



By selecting any operation from “FOLDER OPERATIONS” action menu, a confirmation dialog appears:



Only when a user confirms this dialog the desired operation will be added to the *Task list* queue. The *Task list* is regularly checked for new tasks. When task arrives and no other is running, the given task will be run. Otherwise the task will wait in a queue.
NOTE: Only one task can be performed at a time.

7

Archive

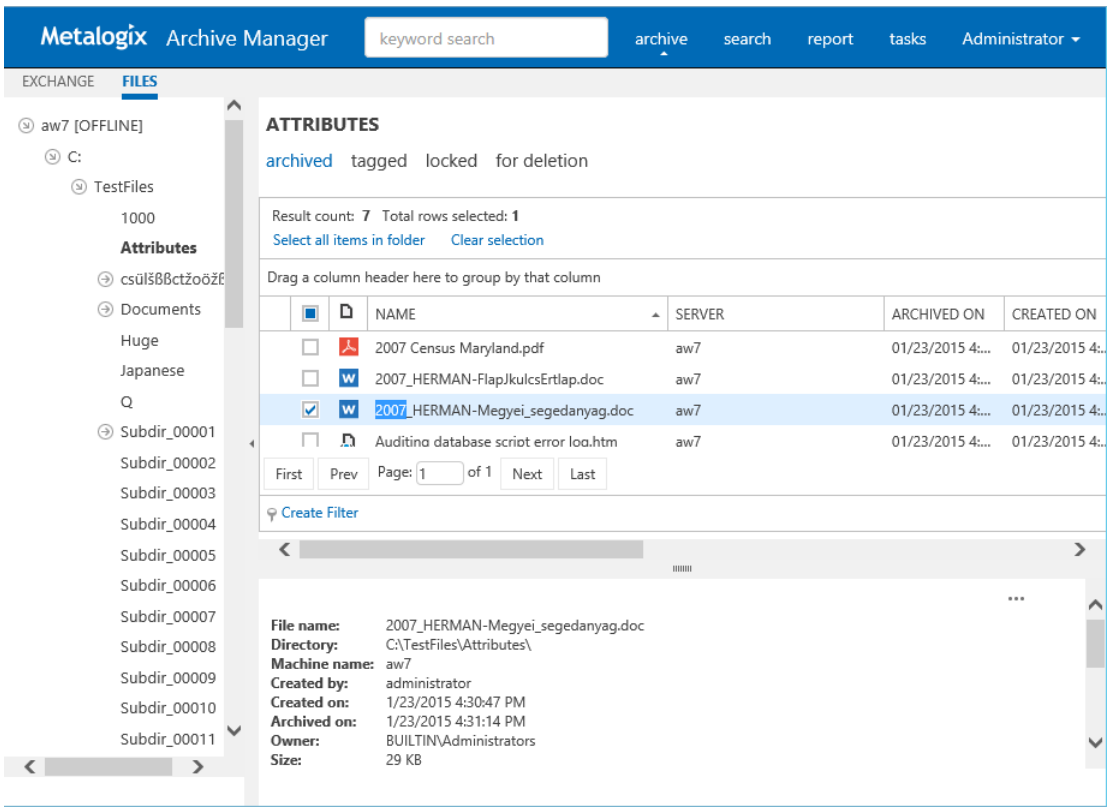
This tab is displayed in ArchiveWeb if Archive Manager for Files is installed in the environment. It allows access to all items archived via Archive Manager for Files form the configured servers. After clicking the **Archive** from the main bar and then **Files** from the grey sub-bar, left navigation pane displays accessible file archive servers offering access to all folders with archived documents. By clicking the arrow sign next to the server/folder, user can unfold the structure down to the desired folder.

Navigation frame can be:

- TreeView – classic treeview
- ListView (pagination) – new type of navigation with pagination

The default setting is TreeView. (Set under Manage Settings / Profile.)

NOTE: [OFFLINE] text next to the file server in the left tree-view (as “aw7 [OFFLINE]” in the screenshot below) indicates that the given server has been decommissioned in your environment and is accessible only via ArchiveWeb. This access must be configured under Manage settings/Management/File Management/Archive Servers.



The content of the folder selected in the left pane is displayed in the main pane of the window. The list can be filtered by categories as listed above the list view:

- archived – all folder archived items are visible
- lost – items that were archived but later deleted from the file system are visible; these LOST ITEMS are not accessible in the file system any more
- tagged – items marked with any tag are visible
- locked – items that were locked are visible
- for deletion – items that were marked for deletion are visible; they are still in the archive and may be also visible in the file system as usual, but when their retention time elapses, they will be completely deleted (see "Mark for deletion" option in the "More actions" section)

For further filtering options see the "*List view*" section further.

List view

With advanced list view functionality provided with every ArchiveWeb list view you can easily search even in huge lists of files and adjust the list to your specific needs. In short, list can be:

- sorted by any column – click the little arrow in the column header
- grouped by any column – drag the desired column to the bar just above the list
- filtered – click the filter link with icon ( ) to create/modify the filter

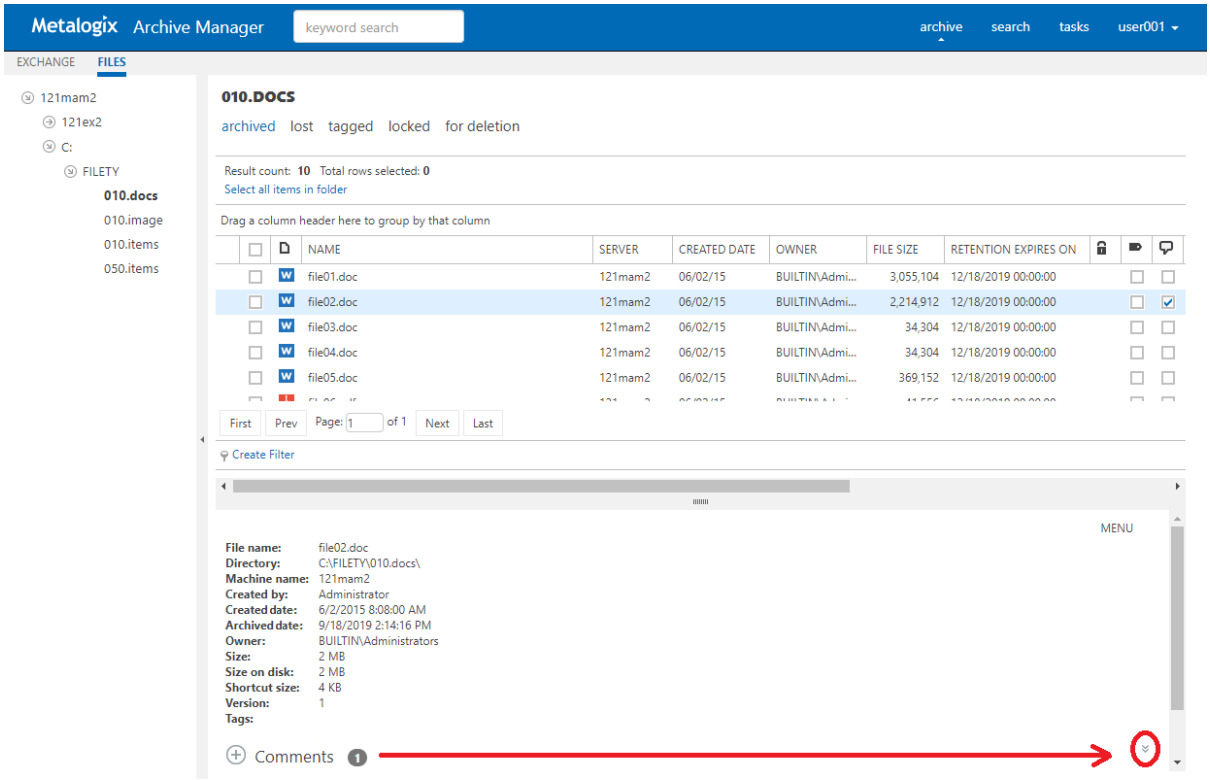
(For more details see the "List view conventions" section.)

The following information are included directly in the list:

- version indicator ( ) - little arrow next to the list item indicates that the given file has also other version(s) in the archive; click the arrow to display it
- file format icon
- file name
- server
- archived date
- created date
- last modification date
- owner
- file size
- retention expiry date
- retention remaining days
- retention from - document archive lifetime staring point (as specified in the Archive Manager for Files console at retention category creation); possible values: file creation time, archiving time or last modification time. The "override" value indicates that the original retention has been changed in ArchiveWeb.
- lock status ( ) – yellow lock icon if the file is locked
- Tagged status ( ) – checked if the file is tagged
- Commented status ( ) – checked if there are comments associated with the file

List columns can be managed (show/hide) in the *Columns* section of the user profile (click **<UserName>** / **Manage settings** / **Profile** / **Settings**).

When you select the document in the main pane, its properties (date of creation, size, shortcut size etc.) are displayed under the list view in the preview pane. Preview is available only for some file types, e.g. for media files (image, video, audio files, and PDF) there is also preview available.



In the **Preview** pane, it is possible to add comments to files. Simply scroll down in the **Preview** pane. Then click plus sign (⊕) next to **Comments** heading. Enter a note in the provided text box and click **Yes**. The comment with creation details is displayed under the **Comments** heading. Should the number next to the heading indicate some comments but none is visible, click the show/hide double-arrow (») to the right (see the screenshot below). The comments will be displayed.

NOTE: Not all **File Archive** tab functions may be available for the logged-on user. The functions must be allowed for the user. For more information see the **Roles** and **Permissions** sections.

More actions

In ArchiveWeb the user can search in archived documents, lock them or adjust the list view. All these and also other tasks are accessible through the **More actions** menu.

Use the **Download** option to download the selected documents.

Performance hint: If Files server contain large files (with size more than 20 MB) it is possible to speed-up the download time and save some system resources. Administrator can set the following keys under <appSettings> in the ArchiveWeb *web.config* file:

Pam4HSMWS	- defines URL of PAM4HSMWS web-service
Pam4HSMWSMethod	- defines download method used, possible values: 1 (file is downloaded to cache first), 2 (file is accessed directly in HSM server). Preferred value is 2.
DownloadChunkSize	- size of the chunks used for download (default value is 32768 bytes)

Example of settings:

```
<add key="Pam4HSMWS" value="http://AW7:7782/PAM4HSM/PAM4HSMWS.asmx" />
<add key="Pam4HSMWSMethod" value="2" />
<add key="DownloadChunkSize" value="32768" />
```

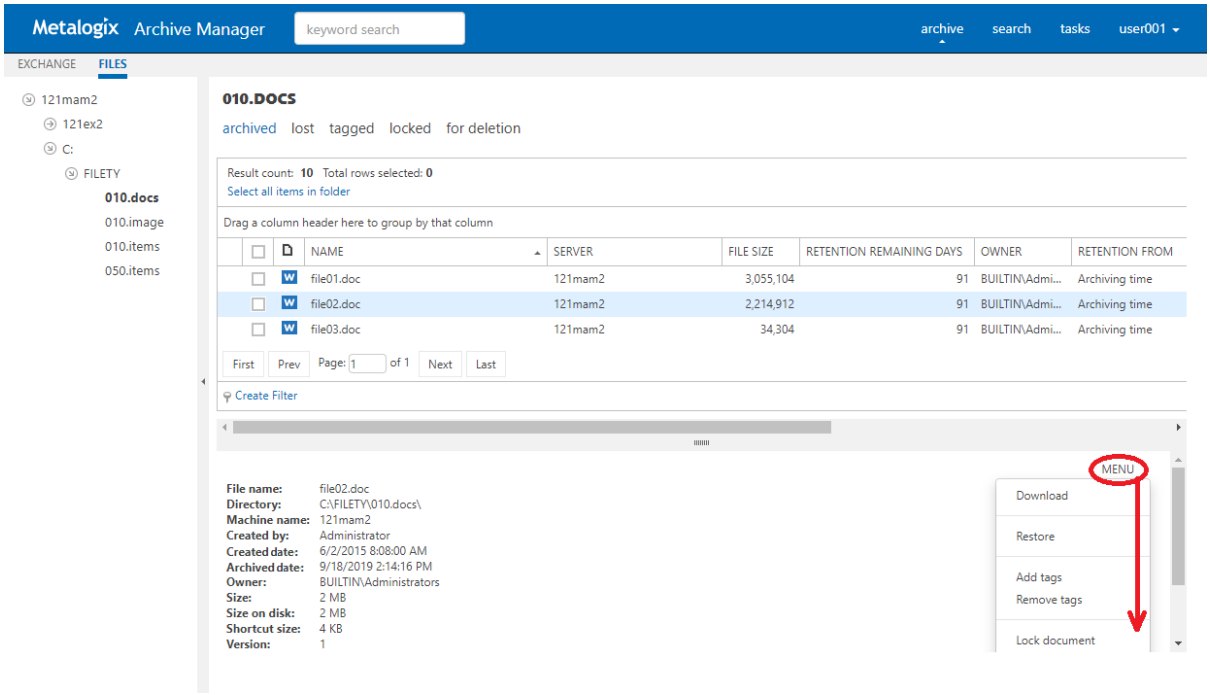
Via the **Restore** option you can restore the whole archived item to the current shortcut location (the item in the archive is not changed in any way).
Use the **Add tags** / **Remove tags** options to tag your items. You can use already created tags or create new ones directly in the pop-up dialog.
Use the **Lock document / Unlock document** option to handle document locks (for more information see the "Legal hold – lock documents" section).

The **Mark for deletion** option marks the given item(s) for deletion in the archive, i.e. when the retention time elapses, the item(s) will be completely deleted from the archive. Until then they stay unchanged.
To display only items marked for deletion, click the deleted category above the list view.

Use the **Extend retention time** option to INCREASE the time for which the item cannot be deleted from the archive. Retention time is set by selecting a date from a Calendar control. Retention time that points to the past cannot be set. After the specified date the item can be deleted manually or by a Delete job if such is scheduled in the Enterprise Manager (for Files).

HSM defines retention as a number of months from the time when the document was stored in HSM or from the time when the retention was changed. These different approaches cause that retentions in Archive Manager and HSM do not match. Especially if file's creation/modification date is used for document's life-cycle or the retention of the document is changed. In such situation the document in HSM is always protected longer than in Archive Manager. Because of this, the document can remain in HSM and can't be deleted by the delete job until HSM retention expires.

The difference between HSM and Archive Manager retention can be up 2 months.



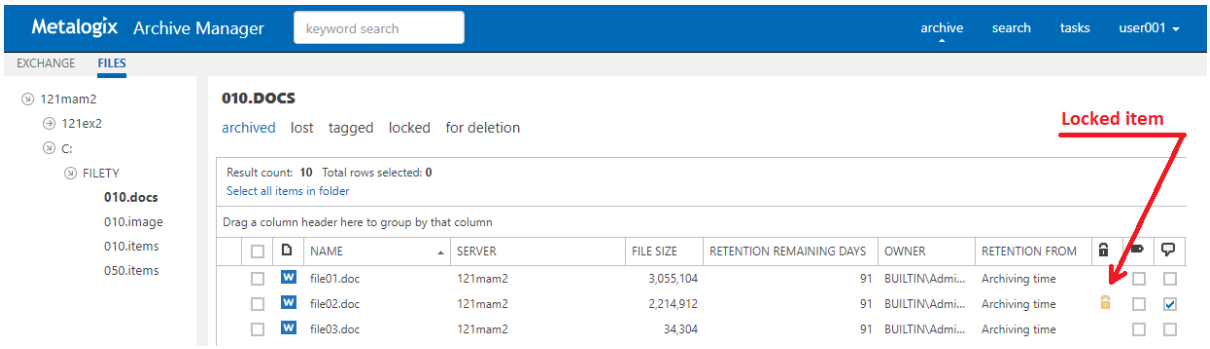
Under the File Archive tab the user can access all files that were archived. Even if the archived file was deleted from the file system, it is accessible in ArchiveWeb. Such items, i.e. archived items which have no shortcut in the file system, are so called LOST ITEMS.

On the **ALL** tab it is not possible to distinguish between these lost items and normal items with shortcuts. However, to see only lost items of the given folder, select the **LOST** tab above the list view.

Legal hold – lock documents

For audit purposes documents can be locked by the user. When the document is locked, it remains in the state in which it was locked, i.e. it cannot be deleted, edited etc. simply it cannot be changed in the system.

To lock documents, select the desired documents in the main pane. In the right upper corner of the preview pane click the **More actions** link (MENU).



From the menu select **Lock document**. Locked documents will be displayed with a lock icon ( ). The lock icon is yellow if you have locked the item and grey if it has been locked in a shared folder by another user.

NOTE: Unlock documents by selecting **Unlock document** from the **More actions** menu.

NOTE: To display only locked items in the given folder, click the LOCKED tab above the list view.

8

Search

ArchiveWeb offers two types of search capabilities:

Keyword search - this type of search uses keywords to search through archived emails and files. If you have installed *Archive Manager for Exchange* and *Archive Manager for Files* on the same server, you can use the keyword search capability to search for archived items across both products at the same time.

Advanced Search - this type of search uses an expanded set of search criteria with product-specific search capabilities. If you have installed *Archive Manager for Exchange* and *Archive Manager for Files* on the same server, you can use the advanced search to search for archived items in one product at a time.

Requirements

1. Archive Manager Search must be installed. This is installed by default during an Express installation or you can choose to install it using Advanced installation. For more information see the Metalogix Archive Manager for Files Advanced Installation Guide.
2. Optical Character Recognition (OCR) search is an optional feature that can also be activated through the *Archive Manager Configuration* tool.
3. Requisite Roles and Permissions must be granted to users who can use the search feature.

In this chapter:

- Keyword Search
- Advanced Search
- Search Results
- Search History
- Search Templates

Keyword Search

Keyword search provides a fast and flexible search for keywords in the email body and attachments of messages in *Metalogix Archive Manager for Exchange,* and file content in for *Metalogix Archive Manager for Files*. When both products are installed, you can search for the same keyword across both products.

Prerequisites

- Archive Manager Search is installed
- The post-processing plugin is configured in the Archive Manager Configuration Tool > Post Processing > Post Processing Scopes for both *Archive server for Exchange* and *Archive server for Files* depending on the products that are installed.

Steps to use keyword search

The steps described below assume the following default settings on the Profile page of ArchiveWeb.

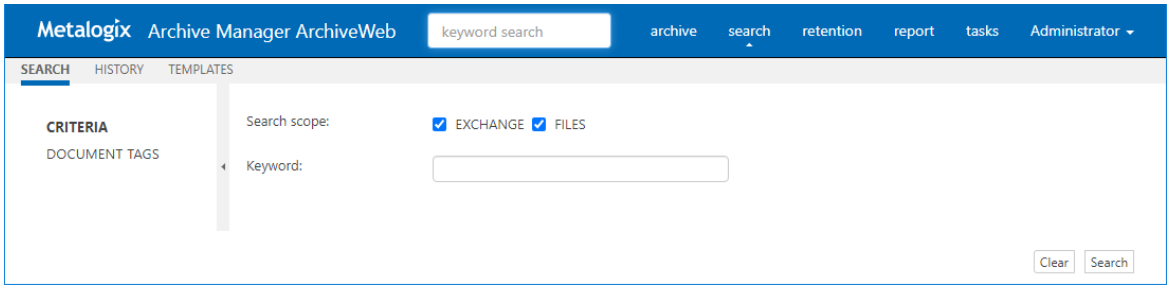
- **Show search field in header** is selected which displays the keyword field in the header.
- **Keyword** is set to **Exact phrase**. No wildcards are added. The user can add a wildcard manually if needed.
- **Set default search scope** is set for both **Exchange** and **Files**.

The steps are as follows:

1. Log in to ArchiveWeb.
2. Enter a word, phrase or combination of words with logical operators like AND and OR in the keyword field in the header.
3. Press the **Enter** key on your keyboard.

-or-

1. Log in to ArchiveWeb.
2. Click **Search** from the main menu. The *Search* view opens.
3. Click the **Search** tab and then click **Criteria** from the navigation pane.
4. For the **Search Scope**, select the **Exchange** check box.



5. Click the **Search** button at the bottom right-hand corner of the page. The search results are displayed on one or two tabs depending on whether one or both products are installed. See Search Results for more information.

   - Exchange Search Results
   - Files Search Results

Wildcards

Keyword search supports wildcards as described in the table below:

Wildcard	Description	Example	SQL representation
*	A substitute for zero or more characters. You can insert wildcards before, after, or before and after a word.	*.htm	LIKE '%.htm'
?	A substitute for a single character to match	Clas?ic film.mpg	LIKE 'Clas_ic film.mpg'

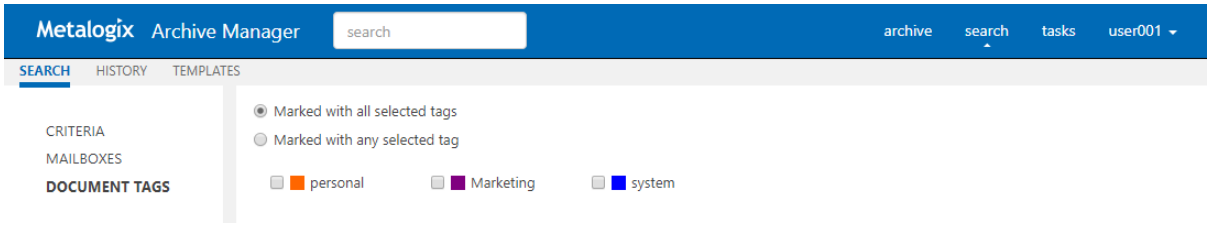
Document tags

The *Document Tags* page displays the tags that you can specify in a search. See Tags for more information about setting up document tags. To search for emails that are tagged, do the following:

1. Select one or more document tags.
2. Select a search option as described below:

   a. **Marked with all selected tags** - select this option to search emails which are tagged with *all* the selected tags.

   b. **Marked with any selected tag** - select this option to search emails which are tagged with any of the selected tags.

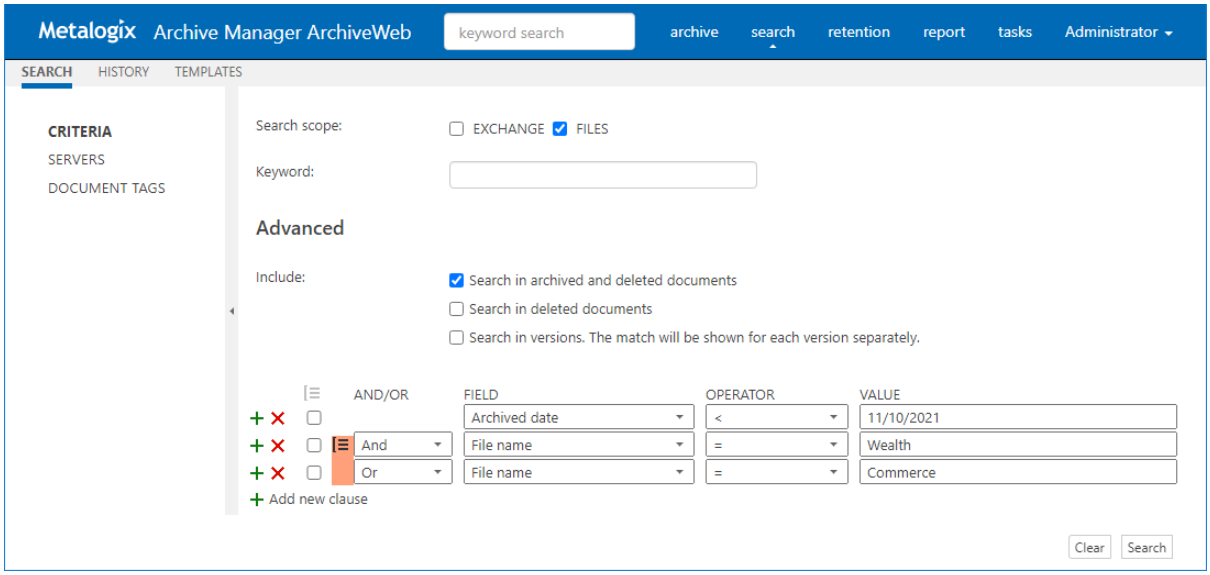


Advanced Search

Advanced search uses an expanded set of search criteria with product-specific search capabilities. Advanced search uses three parts to build the search: **Criteria**, **Servers** and **Document Tags**. When all search specifications have been set, click **Search** in the bottom right-hand corner of the search view.

Criteria

The Criteria page presents the scope, context and file properties of the search. The scope and context of the search are mandatory. If you have installed *Archive Manager for Exchange* and *Archive Manager for Files* on the same server, then advanced search can be used for only one product at a time.



Steps to create an advanced search criteria

1. Click **Search** from the main menu. The *Search* view opens.
2. Click the **Search** tab and then click **Criteria** from the navigation pane.
3. For the **Search Scope**, select the **Files** check box.
4. Ignore the **Keyword** field.
5. **Include** options allow you to specify the category of documents to search.

- *No selection* - only archived documents are searched. Previous versions of these documents are not included.

Select one of the following options:

- **Search in archived and deleted documents** - all documents will be searched. Previous versions of these documents are not included.
- **Search in deleted documents** - deleted documents and documents that are marked for deletion will be searched. All other archived documents will be ignored. Previous versions of these documents are not included.

Add an additional criteria:

- **Search in versions** - Previous versions will be included for the document category specified. The match will be shown for each version separately.

6. In the search *Criteria* pane, click **Add new clause** ➕ and enter the search criteria using the fields as described below:
   a. **And/Or -** select two or more check boxes to create a nested search phrase with the [☰ icon as described in the example below.
   b. **Field** - select a property for the file from the drop down.
   c. **Operator -** select an operator from the drop down.
   d. **Value** - enter a text value to search. For date fields, enter the date in the format *m/d/yyyy*.
7. You can remove a specific row by clicking the **Delete** ✖. To reset the search criteria, click **Clear** in the bottom right corner of the window.

Example of a nested search query

Consider the following search request: *All files that were archived on the specified server(s) before 10th November 2020 and the file name contains either the words Wealth or Commerce*.

Search criteria contains only file properties. Therefore the nested search criteria can be written as follows:

```
Archived Date < 11/10/2020 AND (File name contains Wealth OR File name
contains Commerce)
```

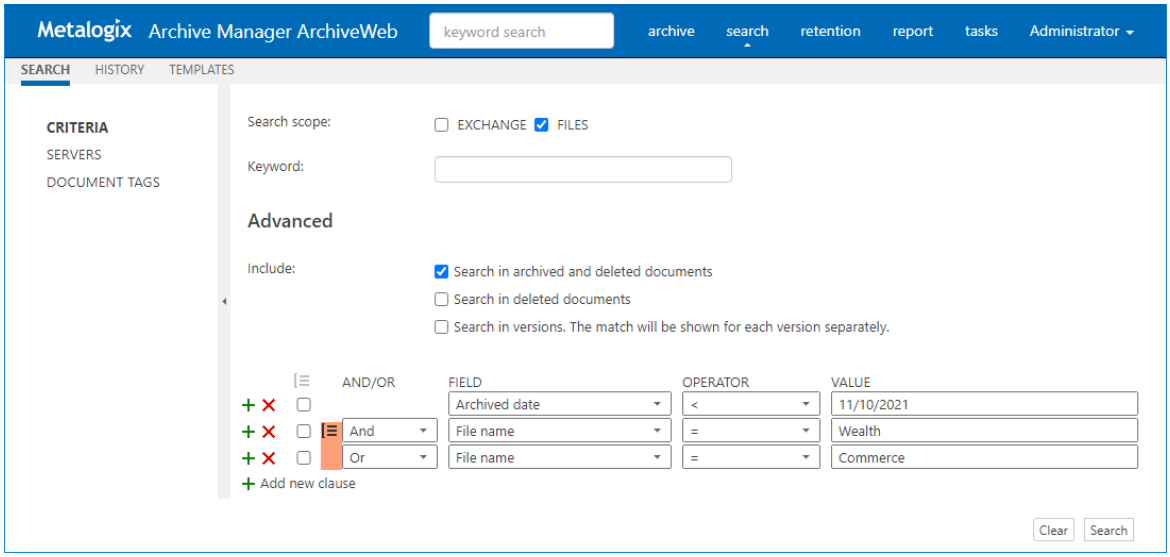
The context of the search query is restricted to the servers selected in the **Servers** page.

To define a nested query in the search page, follow the steps described below:

2. Click **Search** from the main menu. The *Search* view opens.
3. Click the **Search** tab.
4. In the search *Criteria* pane, click **Add new clause** ➕ and enter the search criteria using the fields as described below:
   a. **Field**: Archived Date
   b. **Operator**: <

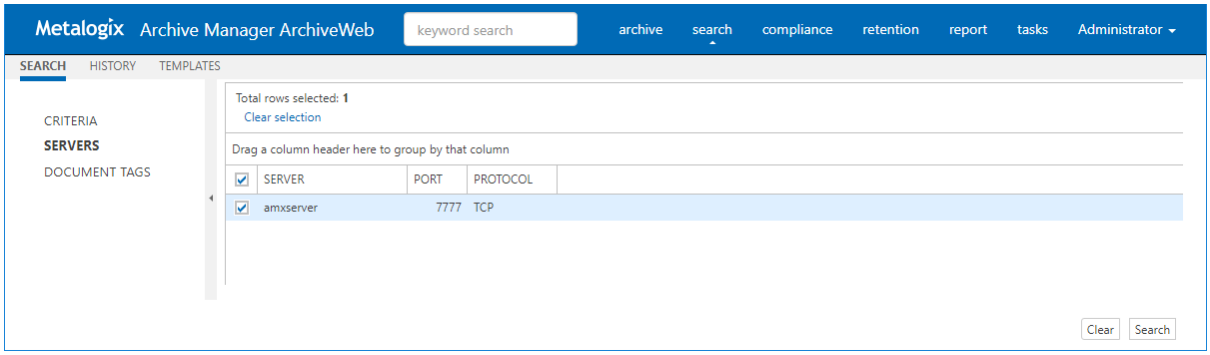
c. **Value**: 11/10/2020

5. Click **Add new clause** and enter the search criteria using the fields as described below:
   a. **And/Or**: And
   b. **Field**: File name
   c. **Operator**: Contains
   d. **Value**: Wealth
6. Click **Add new clause** and enter the search criteria using the fields as described below:
   a. **And/Or**: Or
   b. **Field**: File name
   c. **Operator**: Contains
   d. **Value**: Commerce
7. Since *File name Contains Wealth Or File name Contains Commerce* are nested criteria, select the two check boxes where the **Field** value is *File name*. Then click the ☰ icon that is activated. The fields that are grouped are marked as shown on the image below:



Servers

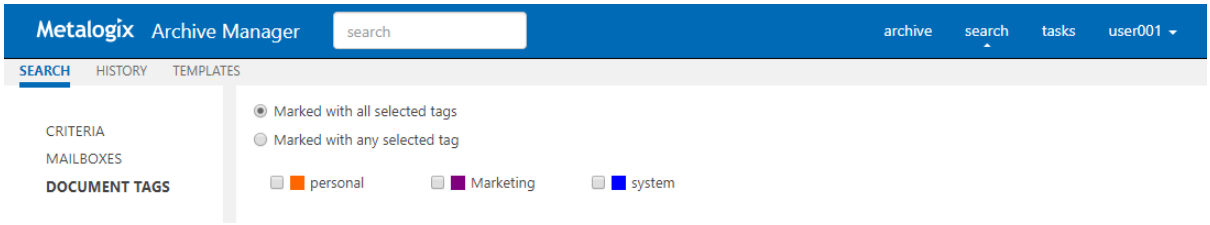
Click Servers in the left pane to select which servers you want to search through. At least one server must be checked to allow searching. The specified selection is preserved across sessions unless the option **Remember last mailbox / server selection** in the Profile page is unchecked.



Document tags

The *Document Tags* page displays the tags that you can specify in a search. See Tags for more information about setting up document tags. To search for files that are tagged, do the following:

1. Select one or more document tags.
2. Select a search option as described below:
   a. **Marked with all selected tags** - select this option to search files which are tagged with *all* the selected tags.
   b. **Marked with any selected tag** - select this option to search files which are tagged with any of the selected tags.



How to build search queries

This topic describes how to build search conditions using the keyword search and advanced search capabilities of Archive Manager for Files. A search condition (or query) can contain zero or more search clauses that are combined using operators and grouping of search clauses.

In this topic

- Simple conditions
- AND/OR operators
- Grouping
- Keyword search

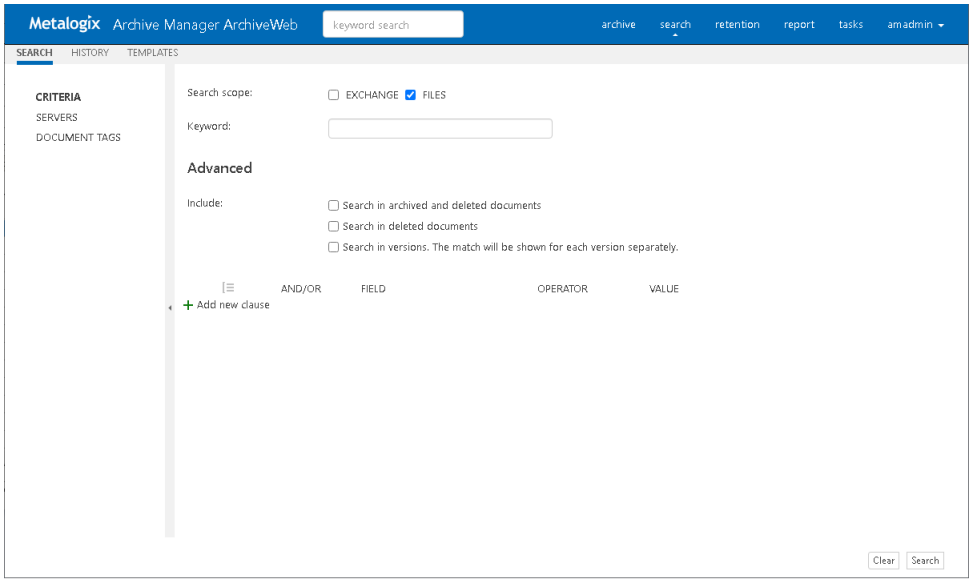
Simple Conditions

A simple search conditions needs no search clause or can contain just one search clause.

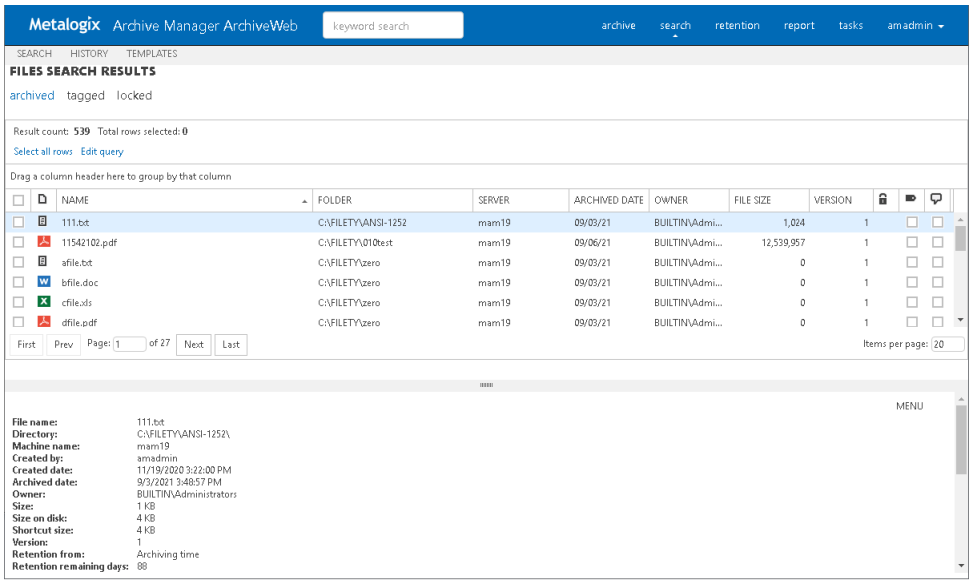
Example 1

Click **Search** without adding a search clause. In this case, you will get back all the archived items.

Query



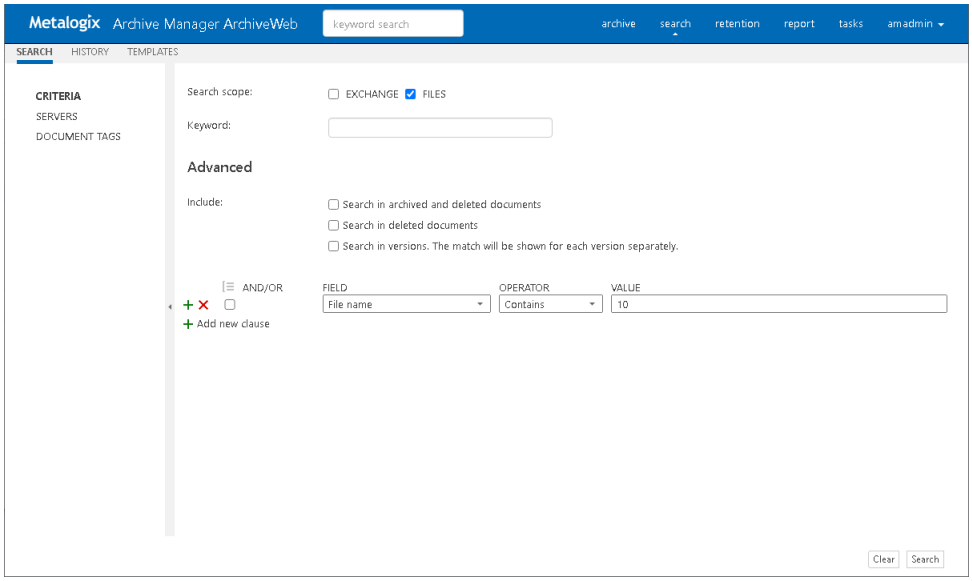
Result



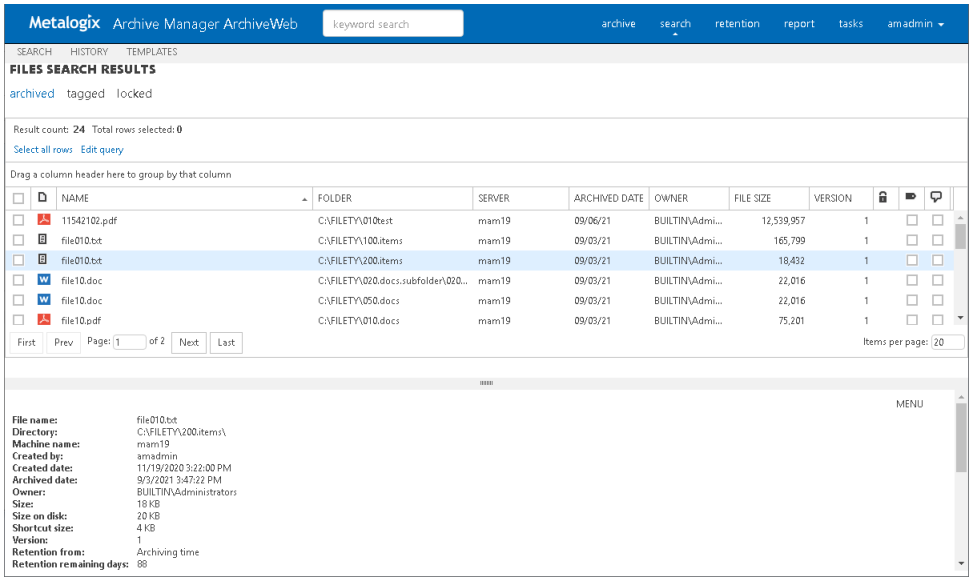
Example 2

Add a single search clause with a condition where the field *File Name* contains the value "10". When you click **Search**, you will get back all the archived items where the *File Name* contains the value "10".

Query



Result



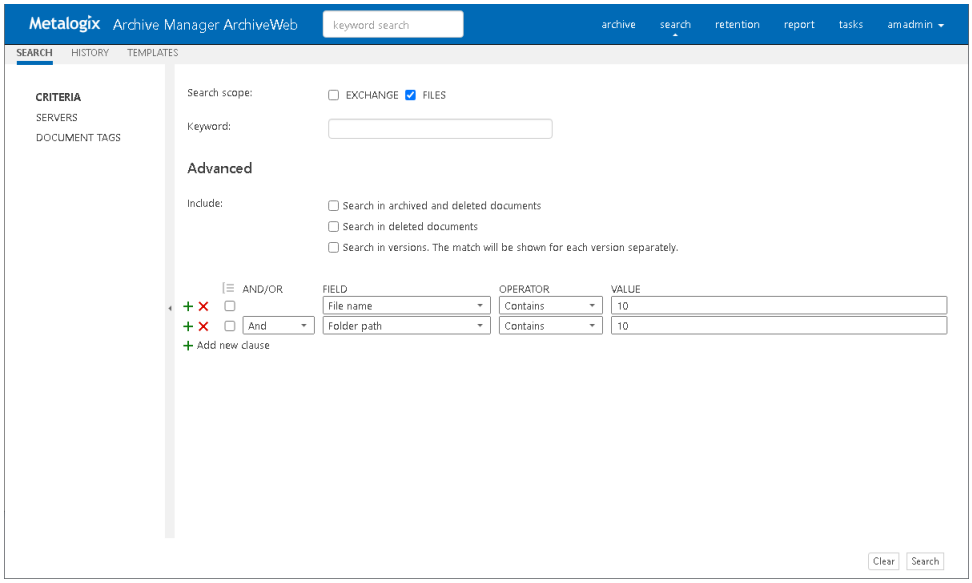
AND/OR operators

The AND/OR operator is used between two search clauses. With these operators, you can combine two or more search clauses. The AND operator will return a search result if both the search clauses separated by the AND operator are fulfilled. The OR operator will return a search result if any one of the search clauses separated by the OR operator are fulfilled. The AND operator has a higher priority over the OR operator. When a search condition contains both the AND and OR operators, the search clauses that are combined with the AND operator must be fulfilled first.

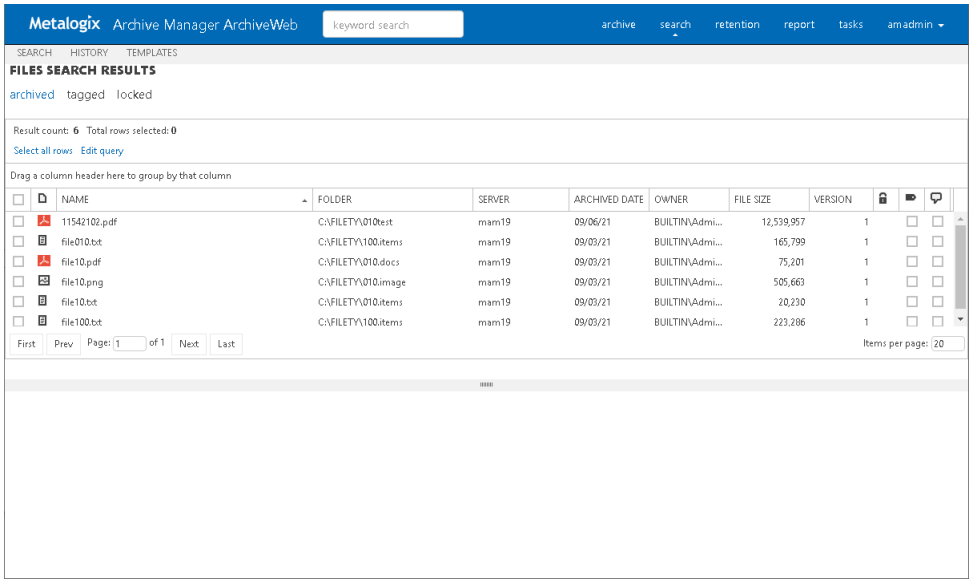
Example 1

To find all items where the *File Name* contains the value "10" AND the *Folder Path* contains the value "10", you must combine two search clauses as shown:

Query



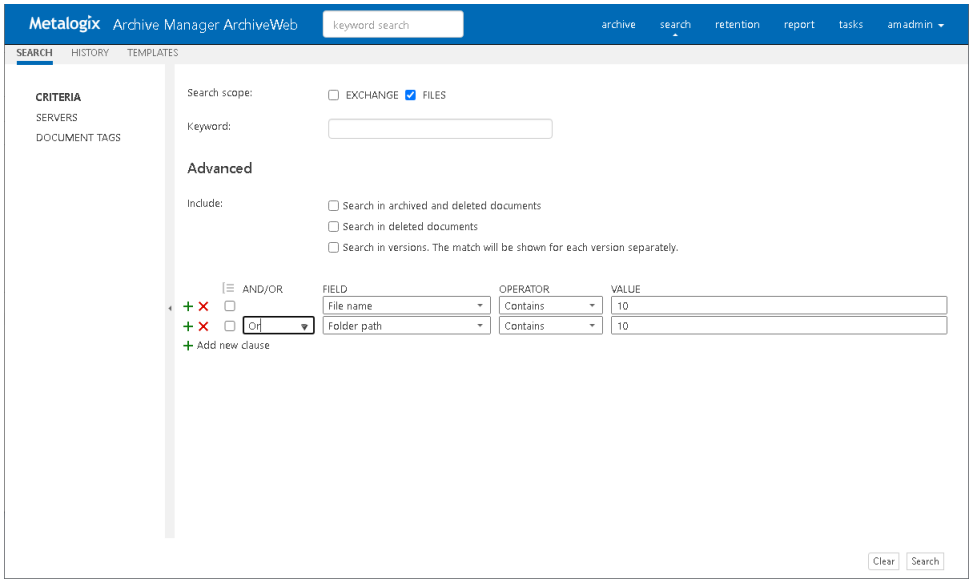
Result



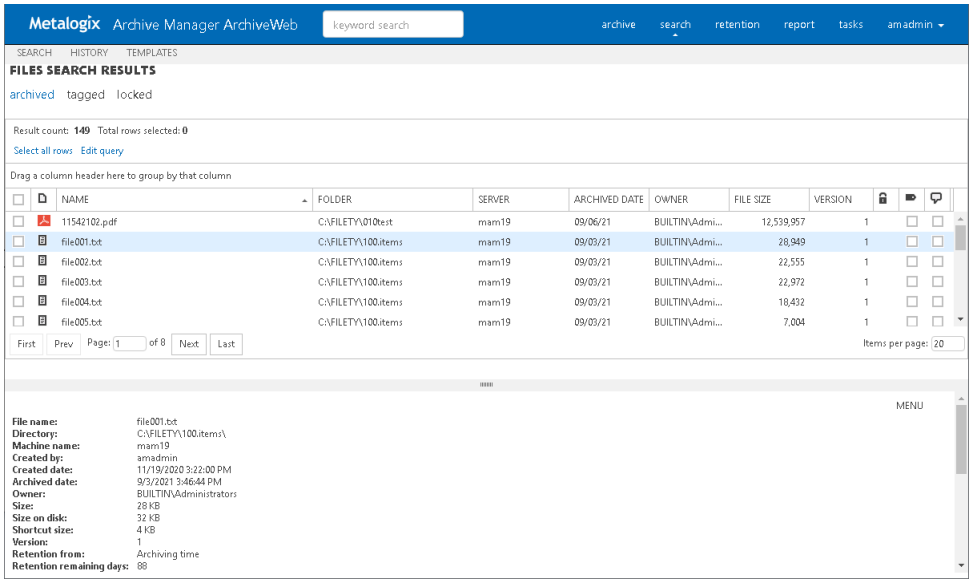
Example 2

To find all items where the *File Name* contains the value "10" OR the *Folder Path* contains the value "10", you must combine two search clauses as shown:

Query



Result



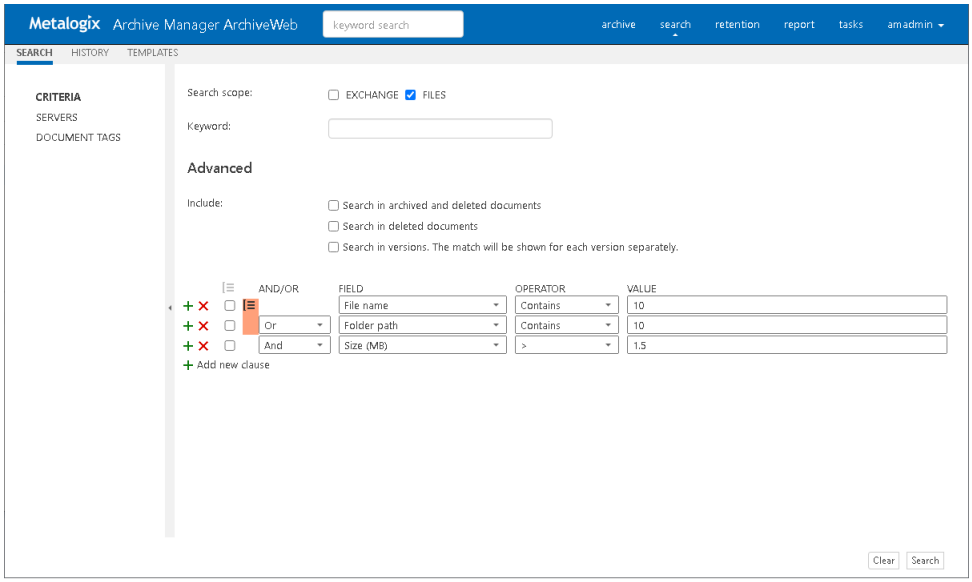
Grouping

Sometimes simple combinations of search clauses with the AND and OR operators are not enough. Grouping is a good solution to change the priority between the operators. The grouped search clauses have a higher priority than the operator before or after the group. The examples in this section describe how the grouping works and what is the difference between the grouped queries and queries without grouping.

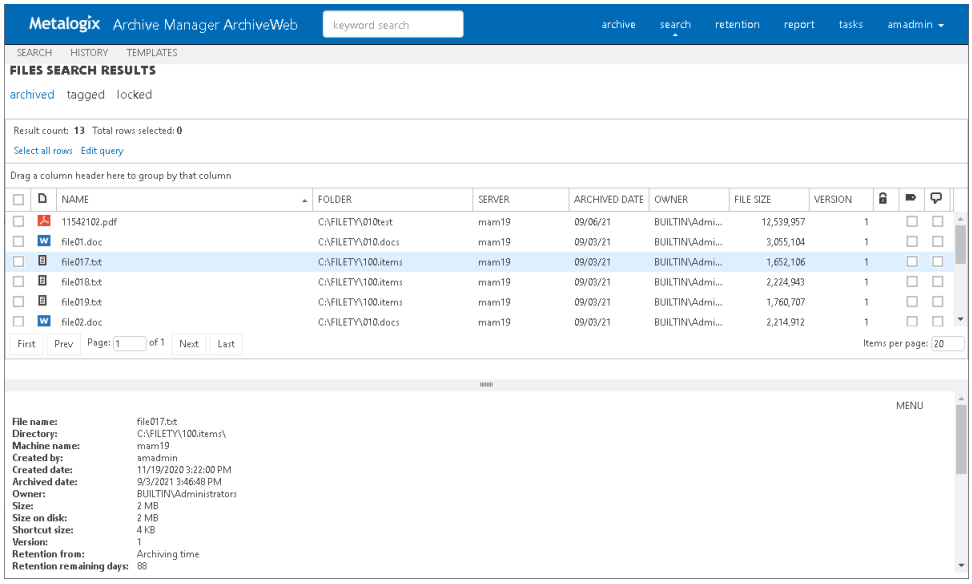
Example 1

To find all items where the *File Name* contains the value "10" OR the *Folder Path* contains the value "10", and all these items must also have bigger file size than 1.5MB then the search condition is as shown:

Query: `(File Name contains "10" OR Folder Path contains "10") AND File Size > 1.5MB`



Result: (File Name contains "10" OR Folder Path contains "10") AND File Size > 1.5MB



We can split this search condition into two parts

1. (File Name contains "10" OR Folder Path contains "10") which is a group

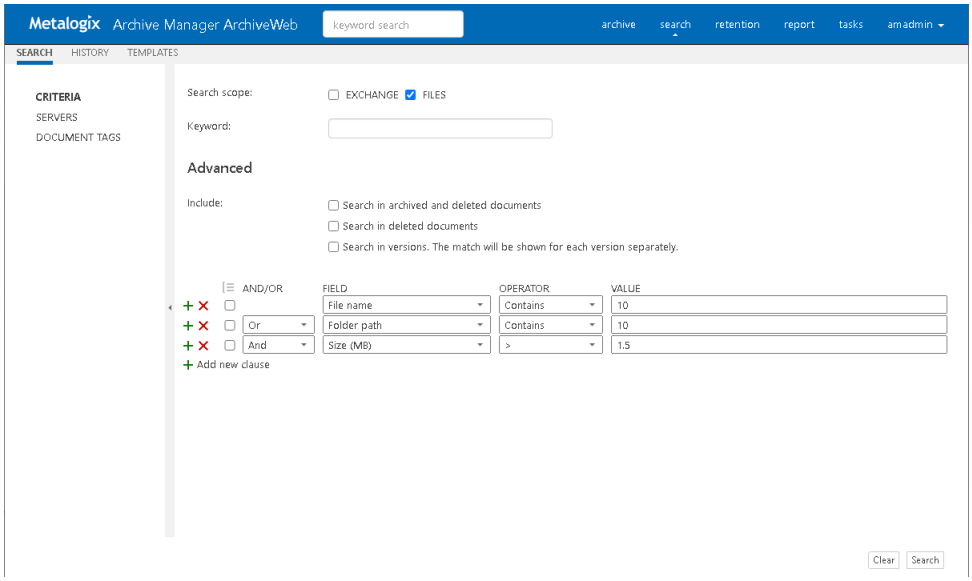
2. AND File Size is bigger than 1.5MB

Since a grouping has a higher priority, the search condition in the group must be fulfilled first. In this case each item in the search result will have a File Name contains the value "10" OR the Folder Path contains the value "10", and the item must be bigger than 1.5MB.

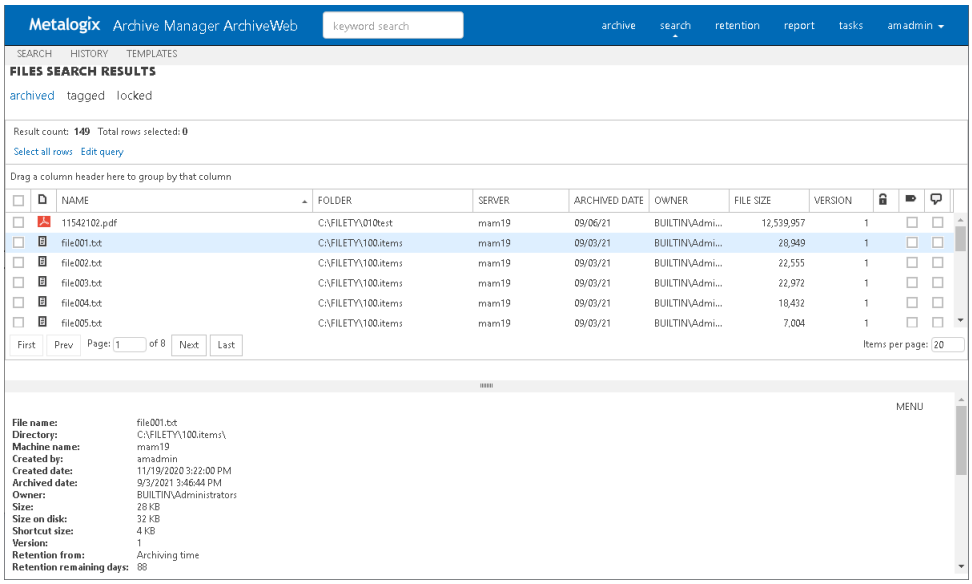
Example 2

To find all items where the *File Name* contains the value "10", or the *Folder Path* contains the value "10" and at the item size must be bigger than 1.5MB, then the query is as shown:

Query: `File Name contains "10" OR Folder Path contains "10"AND File Size > 1.5MB`



Result: File Name contains "10" OR Folder Path contains "10"AND File Size > 1.5MB



This query can be split into two parts

1. File Name contains "10" OR

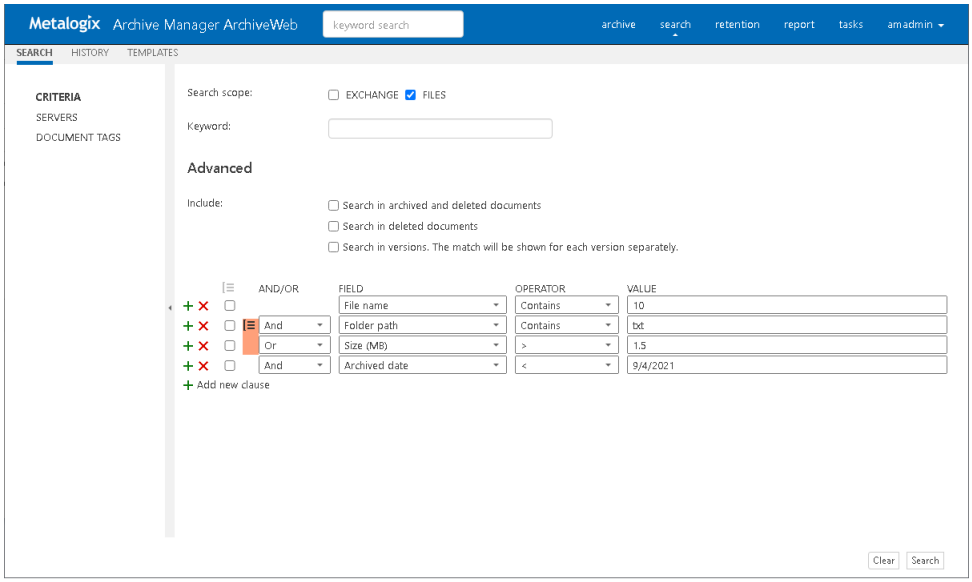
2. Folder Path contains "10"AND File Size > 1.5MB

The AND operator has a higher priority so the search clauses combined with the AND operator must be fulfilled first. In this case the search result will contain items where the item size must be bigger than 1.5MB and the Folder Path must contain the value "10", or the File Name should contain the value "10".

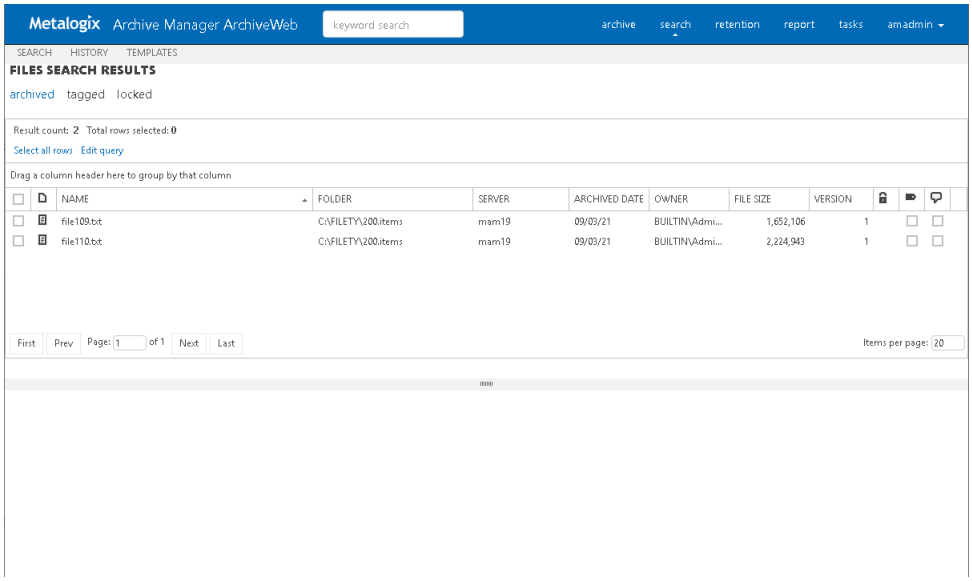
Example 3

To find all items where the *File Name* contains the value "10", and the *Folder Path* contains the value "txt" or the item size is bigger than 1.5MB, and the item Archived Date is older than 9/4/2021 then the search condition is as shown:

Query: `File Name contains "10" AND (Folder Path contains "txt" OR File Size > 1.5MB) AND Archived Date < 9/4/2021"`



Result: File Name contains "10" AND (Folder Path contains "txt" OR File Size > 1.5MB) AND Archived Date < 9/4/2021"



This query can be split into three parts

1. File Name contains "10" AND

2. (Folder Path contains "txt" OR File Size > 1.5MB)

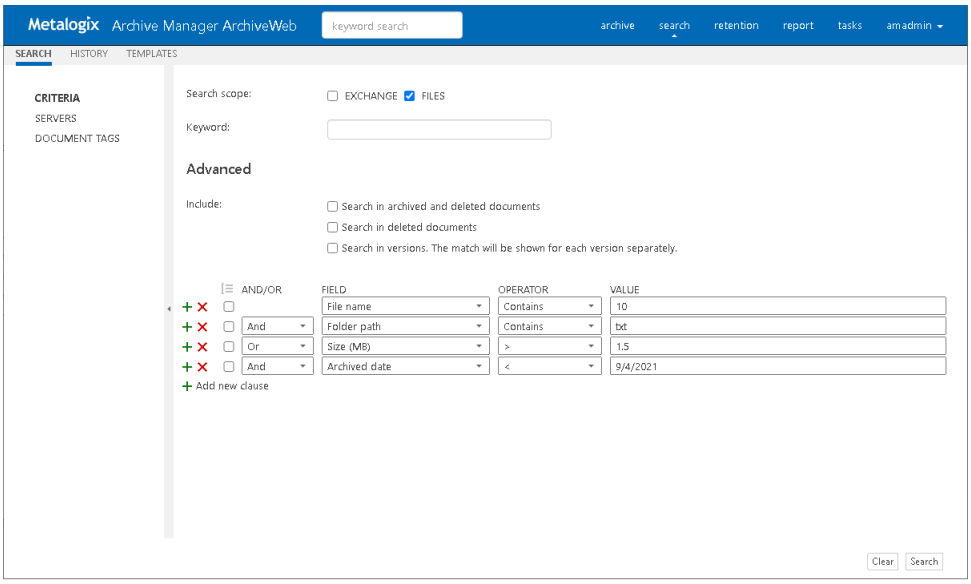
3. AND Archived Date < 9/4/2021"

The grouped search clauses have the higher priority in this query so the search condition in the group must be fulfilled first. In this case the search result will contain items where the File Name must contain the value "10" + Folder Path should contain "txt", or the item size should be bigger than 1.5MB + Archived Date should be older than 9/4/2021.

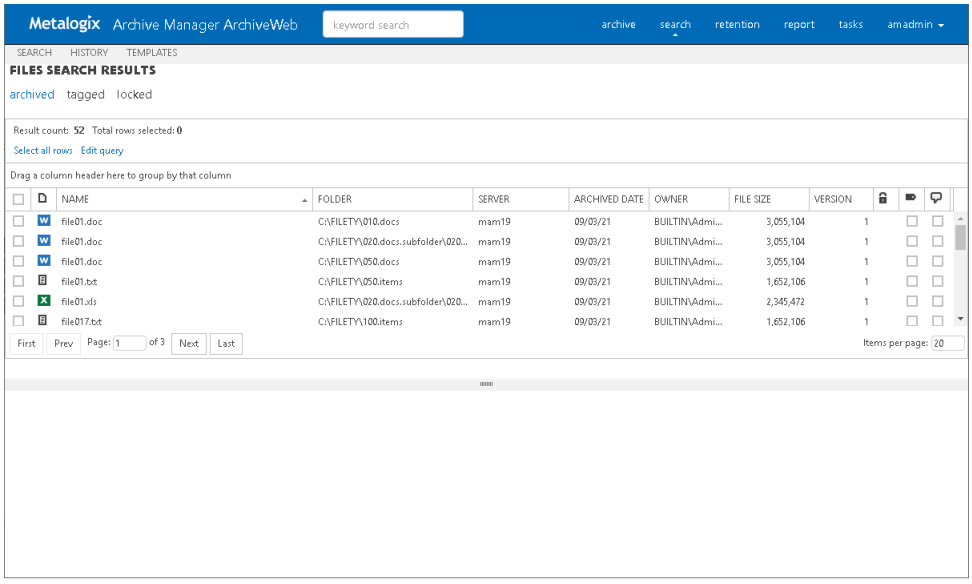
Example 4

To find all items where the *File Name* must contain the value "10" and the *Folder Path* must contain the value "txt", or the item size is bigger than 1.5MB and the item Archived Date must be older than 9/4/2021 then the search query is as shown:

Query: `File Name contains "10" AND Folder Path contains "txt" OR File Size > 1.5MB AND Archived Date < 9/4/2021"`



Result: File Name contains "10" AND Folder Path contains "txt" OR File Size > 1.5MB AND Archived Date < 9/4/2021"



This query can be split into two parts

1. File Name contains "10" AND Folder Path contains "txt" OR

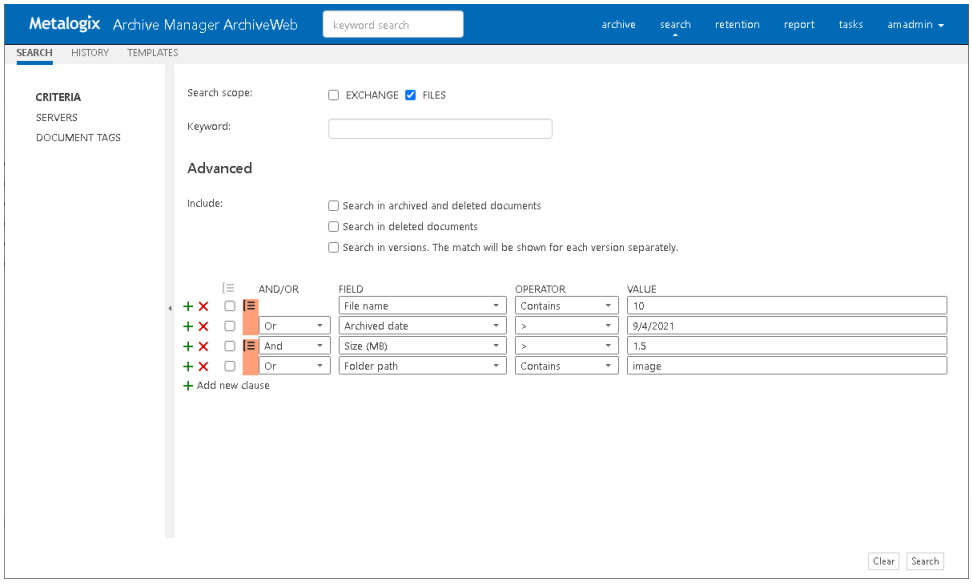
2. File Size > 1.5MB AND Archived Date < 9/4/2021"

The AND operator has a higher priority in this query so the conditions with the AND operators must be fulfilled first. In this case the search result will contain all items where File Name must contain the value "10" and the Folder Path must contain the value "txt", or the item size is bigger than 1.5MB and the item Archived Date must be older than 9/4/2021.

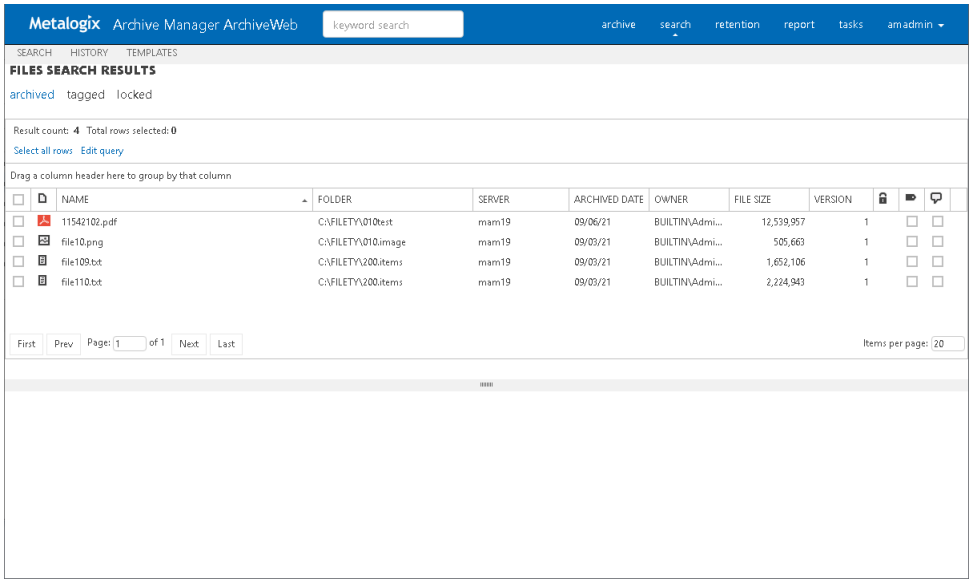
Example 5

To find all items where the *File Name* contains the value "10" or *Archived Date* is newer than 9/4/2021, and the item size is bigger than 1.5MB or the *Folder Path* contains the value "image", then the query is as shown:

Query: `(File Name contains "10" OR Archived Date > 9/4/2021) AND (File Size > 1.5MB OR Folder Path contains "image")`



Result: (File Name contains "10" OR Archived Date > 9/4/2021) AND (File Size > 1.5MB OR Folder Path contains "image")



This query can be split into two parts

1. (File Name contains "10" OR Archived Date > 9/4/2021) AND

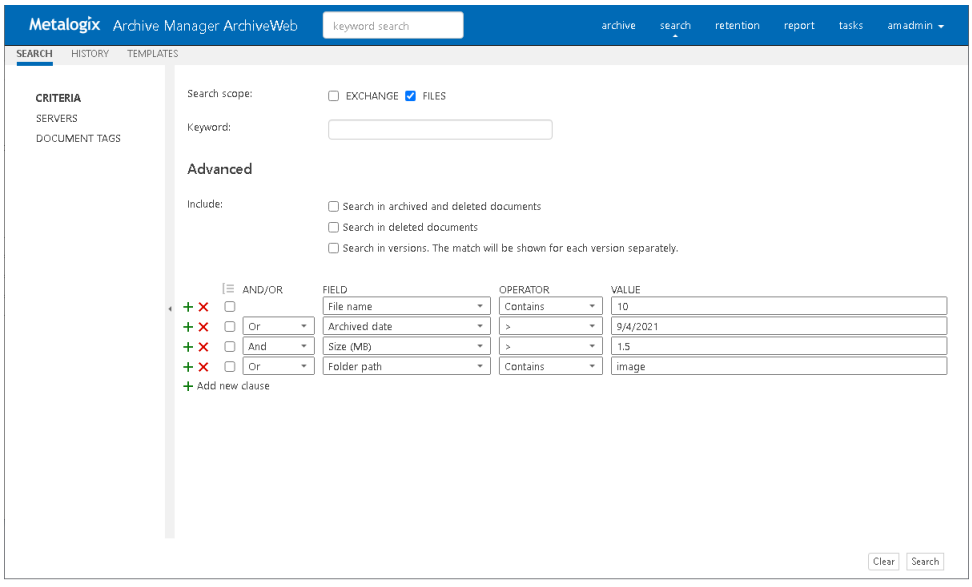
2. (File Size > 1.5MB OR Folder Path contains "image")

The grouped condition has the higher priority in this query so the conditions in the group must be fulfilled first. In this case the search result will contain items where File Name should contain value "10" or Archived Date should be newer than 9/4/2021 + item size should be bigger than 1.5MB or the Folder Path should contain "image".

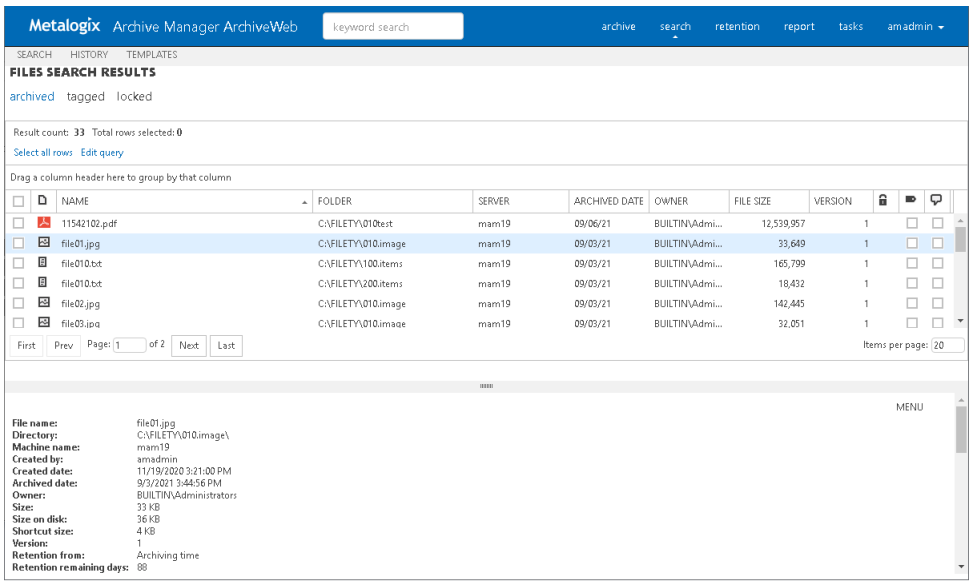
Example 6

To find all items where the *File Name* contains the value "10" or *Archived Date* is newer than 9/4/2021 and the item size is bigger than 1.5MB or the *Folder Path* contains the value "image", then query is as shown:

Query: `File Name contains "10" OR Archived Date > 9/4/2021 AND File Size > 1.5MB OR Folder Path contains "image"`



Result: File Name contains "10" OR Archived Date > 9/4/2021 AND File Size > 1.5MB OR Folder Path contains "image"



This query can be split into three parts

1. File Name contains "10" OR

2. Archived Date > 9/4/2021 AND File Size > 1.5MB

3. OR Folder Path contains "image"

The AND operator has a higher priority so the conditions with the AND operator must be fulfilled first. In this case the search result will contain items where File Name should contain value "10" or Archived Date must be newer than 9/4/2021 and item size must be bigger than 1.5MB or Folder Path should contain "image".

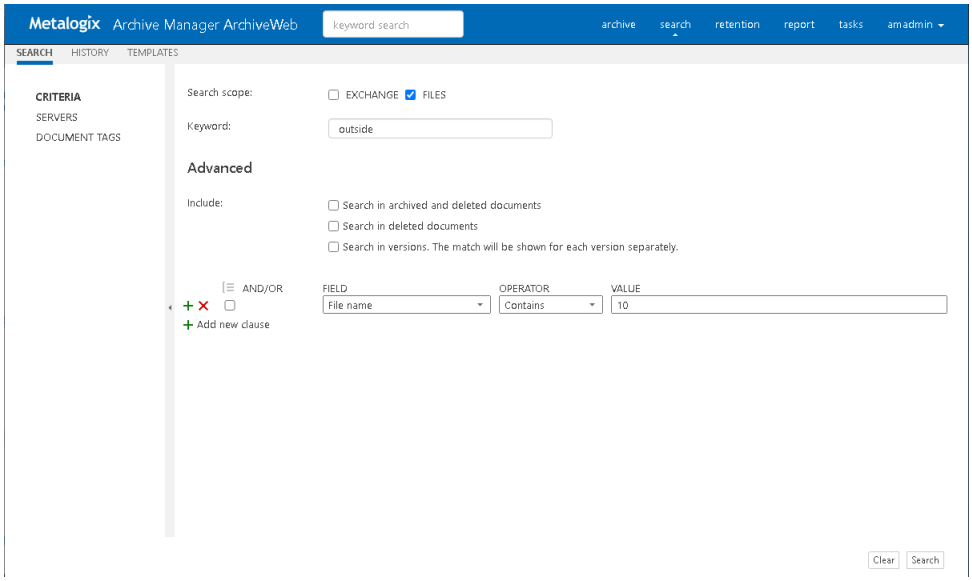
Keyword search

Keyword search provides a fast and flexible search for keywords in the file content in Metalogix Archive Manager for Files. If you leave this field empty, then the search result will show all archived files. If you enter a word or phrase in the keyword field and click Search the result of the search will show all the archived items which contains the entered word or phrase.

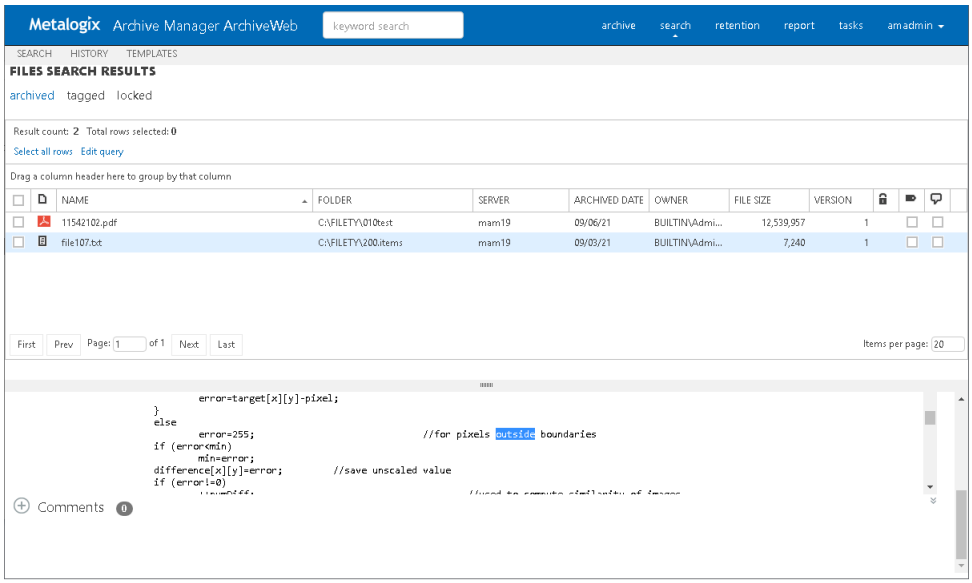
Example 1

You can combine keyword searches with advanced search clauses to find specific item. Keyword searches are combined with advanced search conditions with the AND operator. The search result will contain items that have the keyword and the advanced search conditions as well. To find all items where the *File Content* contains the word "outside" and the *File Name* also contains the value "10", the search query is as shown:

Query



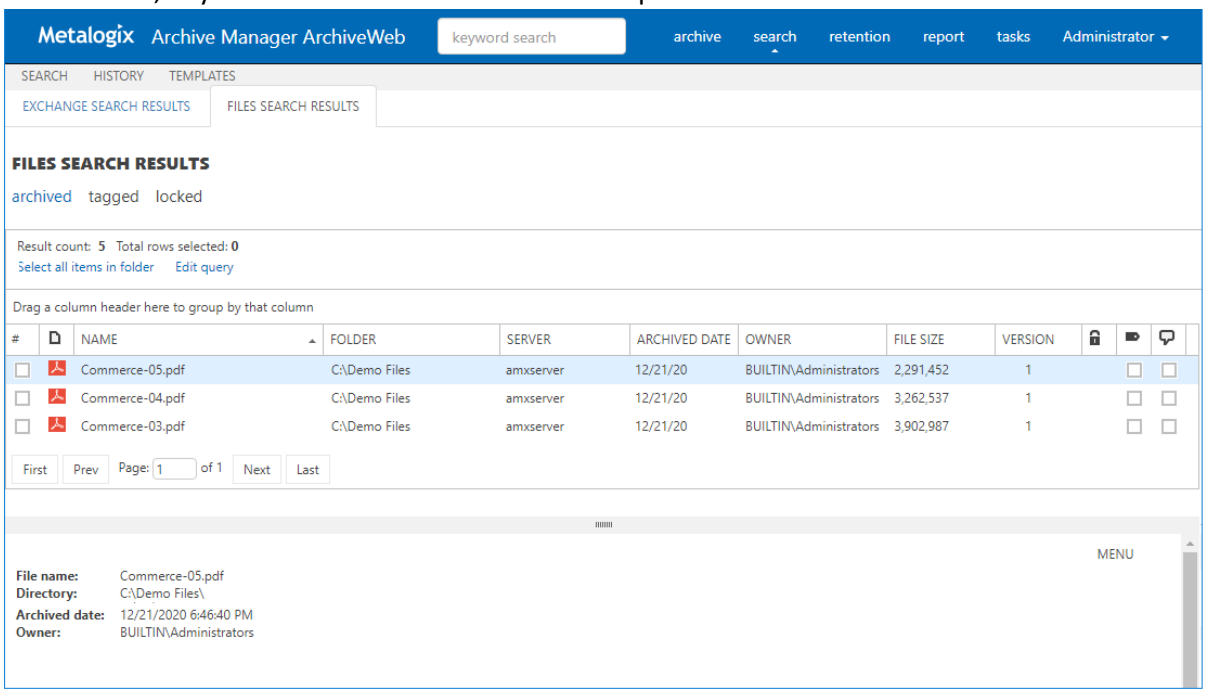
Result: The File Name contains the value "10", and the file content contains word "outside"



Search Results

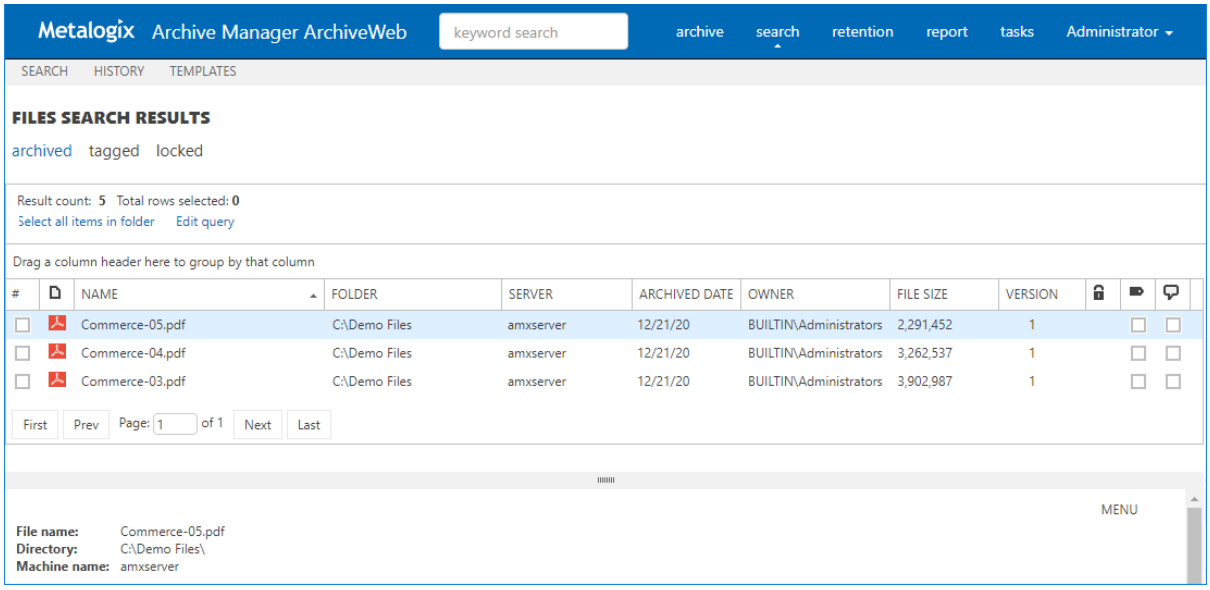
Keyword search

When both *Archive Manager for Exchange* and *Archive Manager for Files* are installed on the same server, keyword search results are listed in separate tabs.



Advanced search

For advanced search, the search results for a specific product are listed since advanced search uses an expanded set of search criteria with product-specific search capabilities.



When you highlight an item from the list, the details of the item is displayed in the pane below the list. The contents of the item are also displayed. If the item is an email with an attachment or a file, the contents of the attachement or file are visible only if the application to view the attachment is also installed on the server. For example, if a PDF viewer is not installed on the server, then the contents of the PDF file will not be visible.

Search Operations

Search operations are asynchronous. Every search operation is listed in the Tasks page.

When you highlight an item, select one or more items or select all items, you can choose an action from a menu to operate on the highlighted or selected item.

When Keyword search is used, keywords in the search results can be highlighted (this function is available only for Exchange search).

Edit query - redirects you to the previous search page where you can perform a new search after editing the existing query.

List view contains the following special columns:

- Folder – specifies item's location (for Exchange search results it is mailbox folder name, for Files search results it is directory path)

List columns can be managed (show/hide) in the Columns section of the user profile (click <UserName> / Manage settings / Profile).

NOTE: For Archive Manager for Files matches can be displayed also for non-supported files such as MS Office documents and HTML. For more details see the "List view conventions" section.

Search History

Every search in ArchiveWeb is logged and displayed in the **History** page. Search history is stored in the search history cache separately for each logged in user who runs a search. Each search history log entry indicates the search type (Exchange, File or Keyword) and the start date and time of the search in the log entry header.

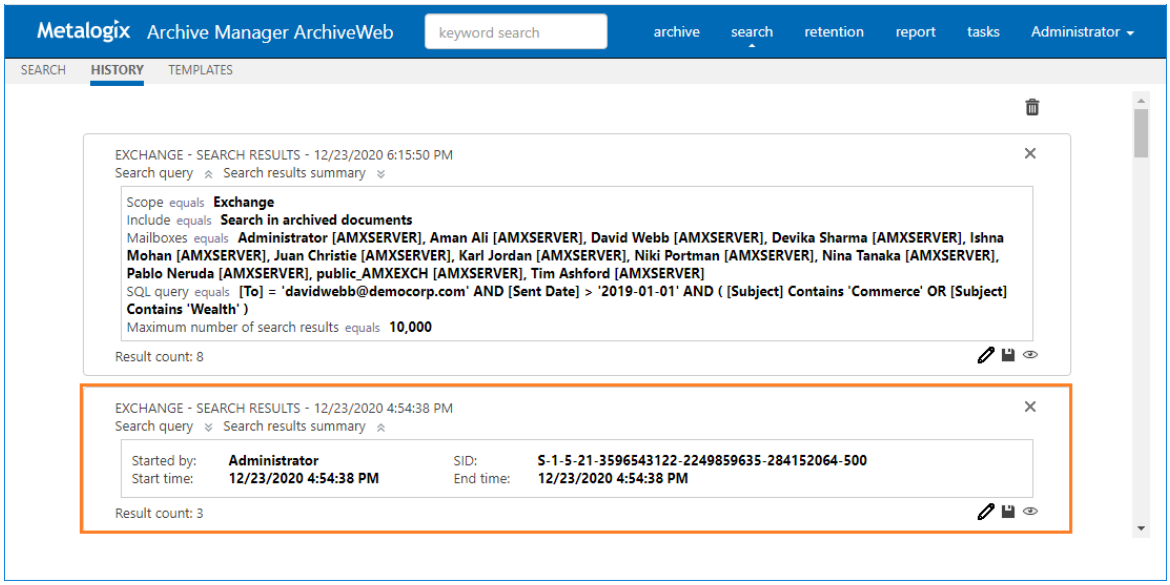
In this topic:

- Viewing the search result summary
- Viewing the search query
- Viewing the search results
- Editing the search query

- Saving the search query
- Extending search history
- Cleaning up search history

Viewing the search result summary

1. Click **Search** on the main menu and then click **History**.
2. Click ⌄ to show the **Search result summary** section.



The search result summary section presents the following information

a. **Started by** - username of the person who ran the search.

b. **Start time** - date and time the search was started.

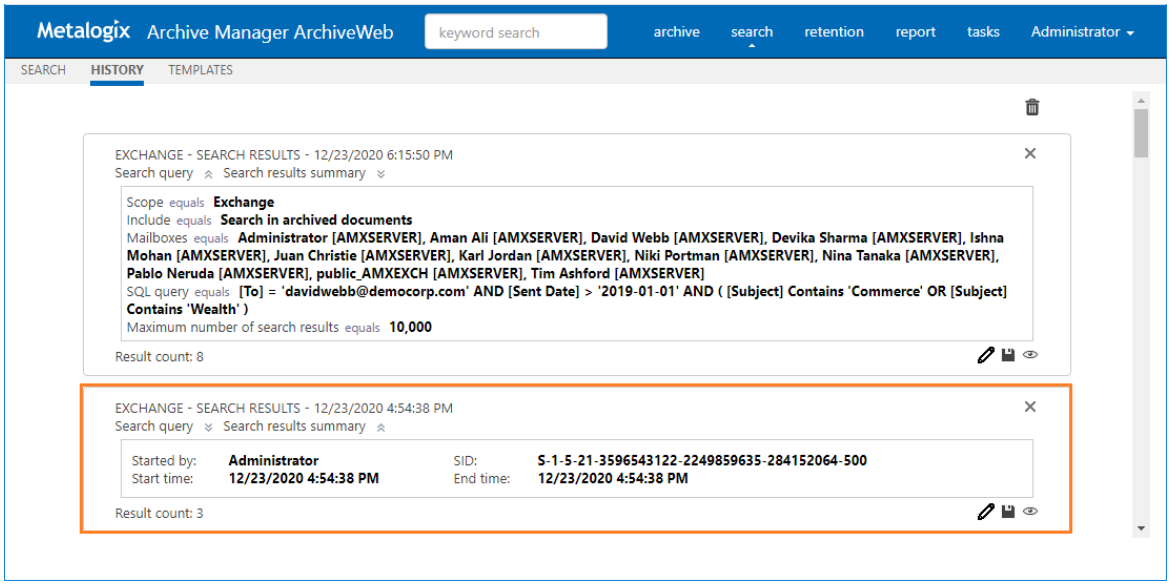
c. **SID** - unique search identifier.

d. **End time** - date and time the search was completed.

3. Click ⌃ to hide the **Search result summary** section.

Viewing the search query

1. Click **Search** on the main menu and then click **History**.
2. Click ⌄ to show the **Search query** section.



The search query section presents the following information

a. **Scope equals** - the application data that is searched.

b. **Include equals** - the data set within the search scope that is included in the search.

c. **Mailbox equals** - the mailboxes that are included in the search.

d. **SQL Query equals** - SQL query that was used to search for archived items.

e. **Maximum number of search results equals** - the upper limit of the result set that was configured for ArchiveWeb when the search was started.

3. Click to hide the **Search query** section.

Viewing the search results

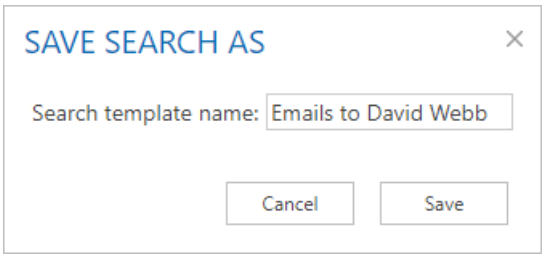
1. Click **Search** on the main menu and then click **History**.
2. Locate the search you want to review.
3. Click to rerun the search. The search results page will open with the search results.

Editing the search query

1. Click **Search** on the main menu and then click **History**.
2. Locate the search you want to review.
3. Click to edit the search query. The main search page opens where you can review and revise the search options and query.

Saving the search query

1. Click **Search** on the main menu and then click **History**.
2. Locate the search you want to review.
3. Click to save the search query. The *Save Search As* dialog opens.



4. Enter a suitable name in the **Search template name** field. Then click **Save** to save the search query as a template.

Extending search history

The search history page displays the last 10 searches by default. To customize the display limit follow the steps described below:

1. Open the `C:\Program Files\Metalogix\MAMSearch\PamSearch.exe.config` file.
2. Add a new section name (if it does not exist) under the `<configSections>` node

```
<?xml version="1.0" encoding="utf-8"?>
   <configuration>
      <configSections>
         .
         .
         .
         <section name="SearchHistory"
type="System.Configuration.NameValueFileSectionHandler,System,
Version=1.0.3300.0, Culture=neutral,
PublicKeyToken=b77a5c561934e089" />
      </configSections>
```

3. Create a new **SearchHistory** section (if it does not exist)

```
<?xml version="1.0" encoding="utf-8"?>
   <configuration>
      <configSections>
         .
         .
         .
         <section name="SearchHistory"
type="System.Configuration.NameValueFileSectionHandler,System,
Version=1.0.3300.0, Culture=neutral,
PublicKeyToken=b77a5c561934e089" />
      </configSections>
      <SearchHistory>
         <add key="maxcount" value="20" />
      </SearchHistory>
         .
```

```
        .
        .
   <configuration>
```

4. The **maxcount** value can be any number between 1 and 2147483647. When this key is missing from the *PamSearch.exe.config* file, the default value 10 is used.

Cleaning up search history

Search history is stored SQLITE files in a cache folder. The default location is `C:\Program Files (x86)\Metalogix\MAMSearch\SearchCache\<userSID>\*.sqlite` and the cache is periodically cleaned. To customize the search history cache retention time limit follow the steps described below:

1. Open the `C:\Program Files\Metalogix\MAMSearch\`**`PamSearch.exe.config`** file.
2. Add a new section name (if it does not exist) under the **`<configSections>`** node

```
<?xml version="1.0" encoding="utf-8"?>
   <configuration>
      <configSections>
         .
         .
         .
         <section name="SearchHistory"
type="System.Configuration.NameValueFileSectionHandler,System,
Version=1.0.3300.0, Culture=neutral,
PublicKeyToken=b77a5c561934e089" />
      </configSections>
```

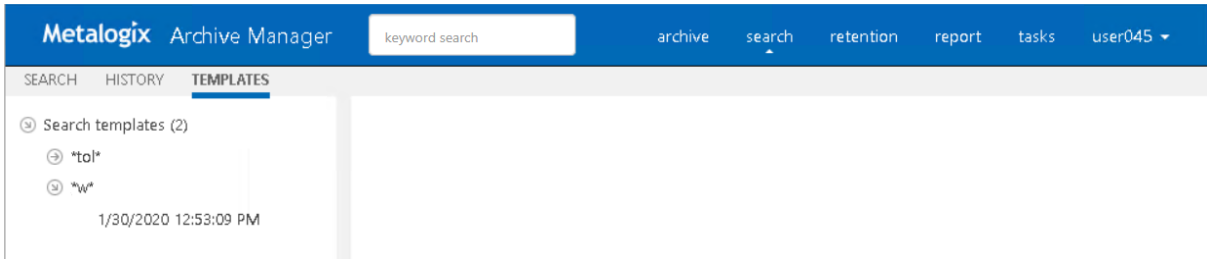
3. Create a new **SearchHistory** section (if it does not exist)

```
<?xml version="1.0" encoding="utf-8"?>
   <configuration>
      <configSections>
         .
         .
         .
         <section name="SearchHistory"
type="System.Configuration.NameValueFileSectionHandler,System,
Version=1.0.3300.0, Culture=neutral,
PublicKeyToken=b77a5c561934e089" />
      </configSections>
      <SearchHistory>
         <add key="timelimit" value="365.23:59:59" />
      </SearchHistory>
         .
         .
         .
   <configuration>
```

4. The **timelimit** format is `days.hours:minutes:seconds`. For example, the value **365.23:59:59** indicates that the search history entries will be stored for 365 days, 23 hours, 59 minutes and 59 seconds.

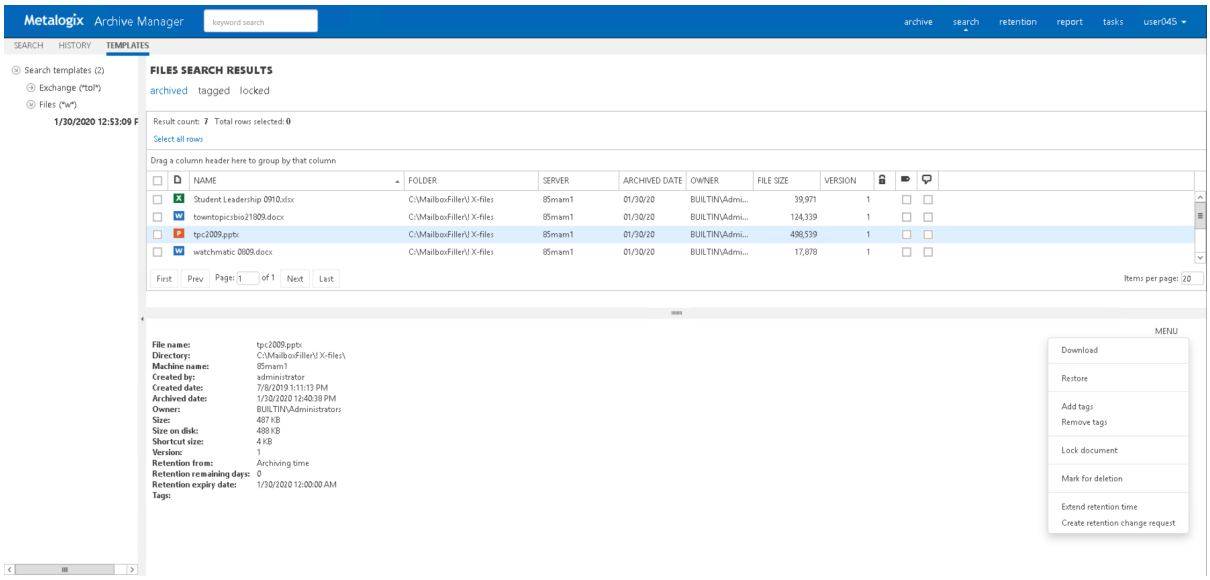
Search Templates

When you expand the **Search / Templates** node, you may see a list of search templates that have been saved so far (search results can be saved from **History** tab as described in the "*History*" section).



Click on the arrow next to the template to expand the template node. Under this node you will see the link to respective search results - with the date and time when they were saved.

Clicking the search results link will display the search results in the main pane. Here you can benefit from the filtering functionality as in all ArchiveWeb lists – grouping, filtering by status (tagged, locked etc.) and creating custom filters.



The MENU link in the top right corner of the item detail pane offers additional actions for the selected item:

- **Download** – download the selected item.
- **Restore** – restore the selected archived item to original item.
- **Add tags** or **Remove tags** – adds or removes a tag from the selected item.

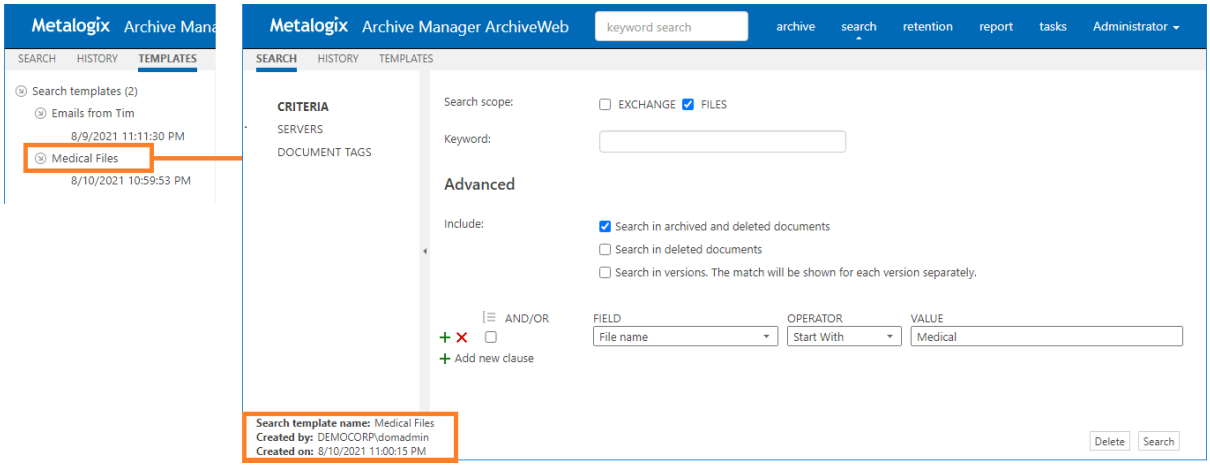
- **Lock/Unlock document** – locks or unlocks selected item.
- **Mark for deletion** – marks the selected item for deletion. The item will be deleted according to the retention category in use.
- **Extend retention time** – increase the time for which the item cannot be deleted from the archive. Setting shorter retention than the actual retention is not supported. After the specified period (in months) the item can be deleted manually or by a *Delete job* if such is scheduled in respective Enterprise Manager.
- **Create retention change request** – send a request to the approving person for selected item deletion or increased retention time when it can't be deleted from the archive. The *Approver* who is the person with adequate permission in Archive Manager, will receive the request through email notification if Archive Manager SMTP is properly configured.

Templates handling

When you click on any template name under the **Templates** node, ArchiveWeb redirects you to the given search criteria page. It can be either Exchange, Files or Common search depending on the template. All search criteria are configured by the template. You can click **Search** to perform the same search with the search settings specified in this template.

On the screenshot below you can see how the template is displayed once you click its name under the **Templates** node. The main pane presents the usual Exchange/Files/Common search window. The only difference is the bottom part of the windows. There you see the template metadata (name, user, date of creation etc.) and action buttons:

- **Search** – runs search query
- **Delete** – deletes the template completely from the Templates node



9

Report

With Report functionality at hand, users have overview of their email and/or file archives. Clear concise information in terms of how many items were archived, when, what is their size – original or shortcut etc. Files features also information on retrieved items.

Report section consists of two tabs - **Statistics** tab with information on archived emails/items and **Audit** tab with logs of user actions.

Please note that full access to this functionality must be granted to the user under Permissions (see the Roles & Permissions section).

Statistics

This tab was designed to give the administrator fast, reliable and comprehensive information about archived emails/files. The number of emails/files, their size as well as space saved on the disc at archiving – all these essential data can be sorted by folder, user or time period. Exporting the statistics is also possible.

Statistics are available for:

- Exchange Archive
- Files Archive

NOTE: Not all **Statistics** functions may be available for the logged-on user. The user must be granted the necessary permissions. For more information see the **Roles** and **Permissions** sections.

Exchange Archive statistics

To generate the Archive Manager for Exchange statistics click on the **Report** from the main menu bar. Then form the grey sub-bar click **Statistics** and unfold the **Exchange Archive** node. Then select whether you want to display statistics for:

- **Archived messages** (count of messages) or
- **Archived size** (size of original message; shortcut size etc.)

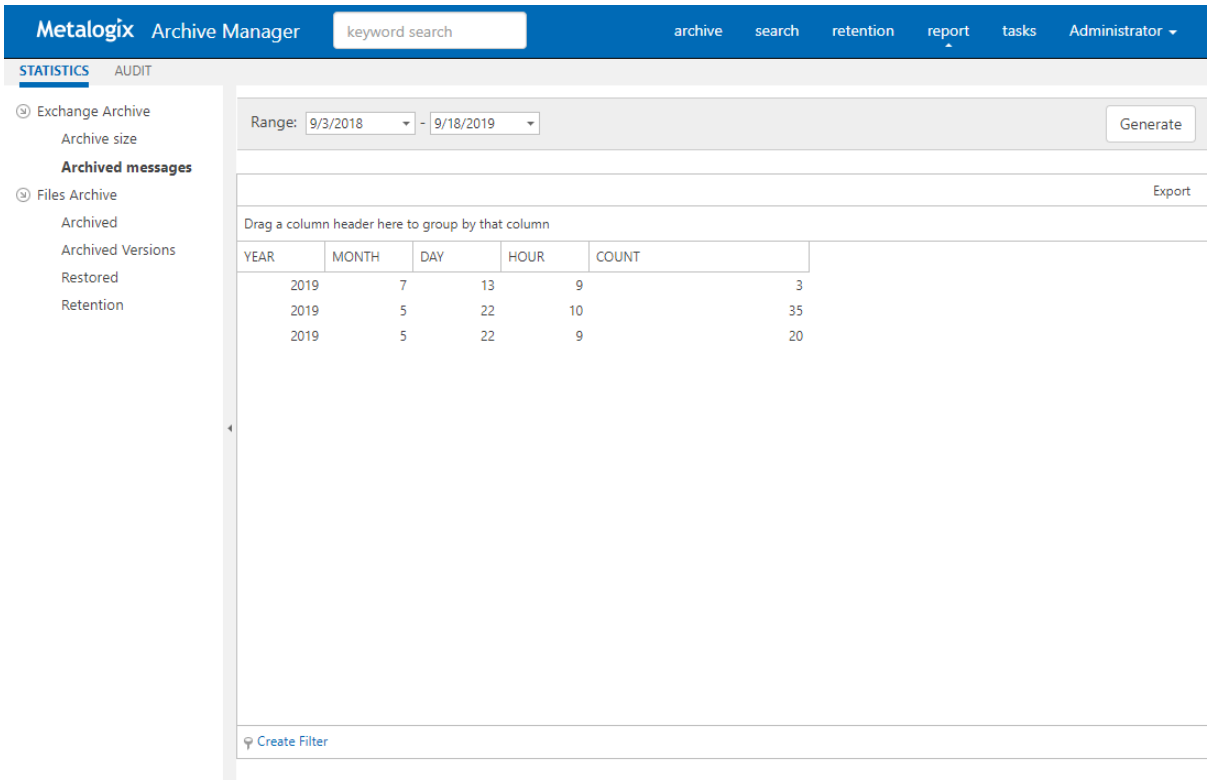
NOTE: DATE RANGE SELECTION IS ALSO POSSIBLE (TO IMPROVE PERFORMANCE). The statistics can be generated also in Archive Manager for Exchange Enterprise Manager.

Files Archive statistics

To generate the Archive Manager for Files statistics click on the **Report** from the main menu bar. Then form the gray sub-bar click **Statistics** and unfold the **Files Archive** node. Then select whether you want to display statistics for:

- **Archived** (details on archived files) or
- **Restored** (detailed on restored files)
- **Archived versions** (details on files with versions in the archive)
- **Retention** (details on files whose retention ends at the listed date) - a new column “Retention remaining days” and pagination have been added

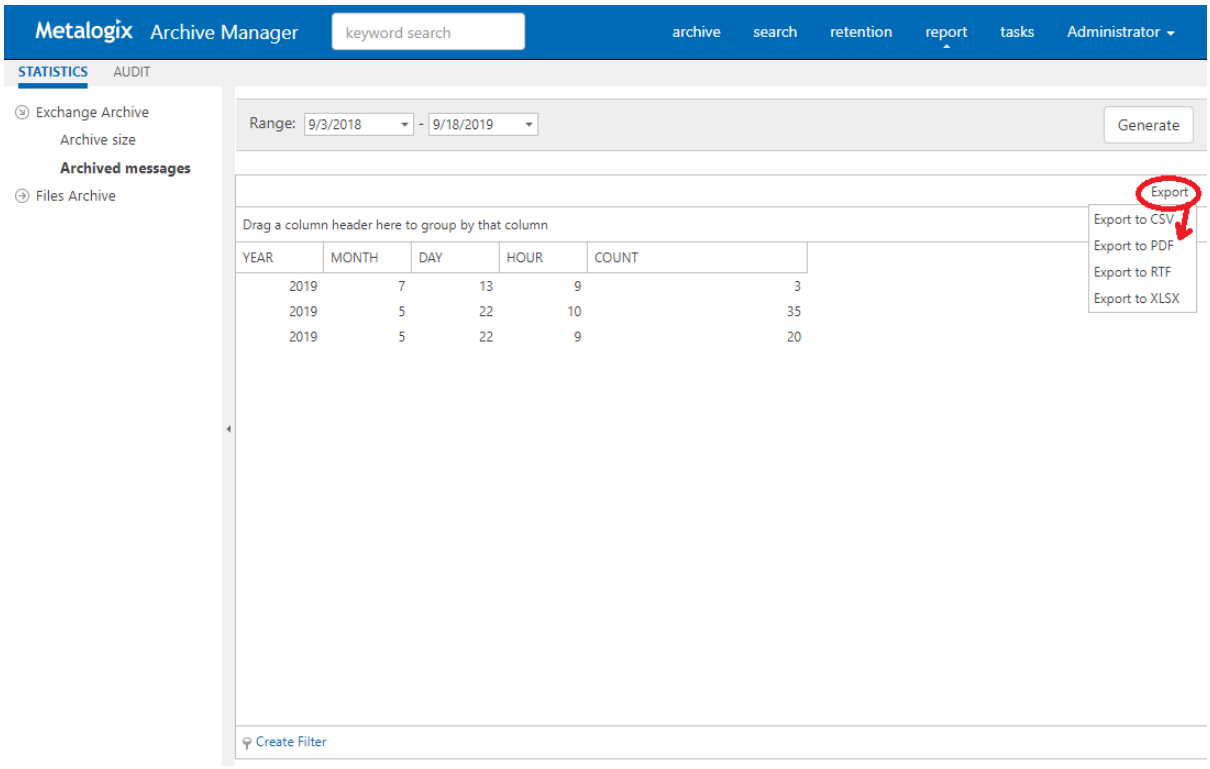
NOTE: The statistics can be generated also in Archive Manager for Files Enterprise Manager.



Statistics table functions are similar to ArchiveWeb table functions:

- Change the column sorting order by selecting the given column header and clicking its down/up arrow on the right (in case the arrow is not visible adjust the width of the column by dragging the line)
- Group table data by any column. To do so, drag the column header to the bar right above the table. Generated groups can be expanded by clicking the arrows next to them. As usual, the sorting order can be changed by clicking the little arrow in the dragged column header.

To export the data, click **Export** at the top-right of the table. The *Export* menu opens and you can choose to export the statistics to Excel, CSV, PDF or RTF.



Audit tab

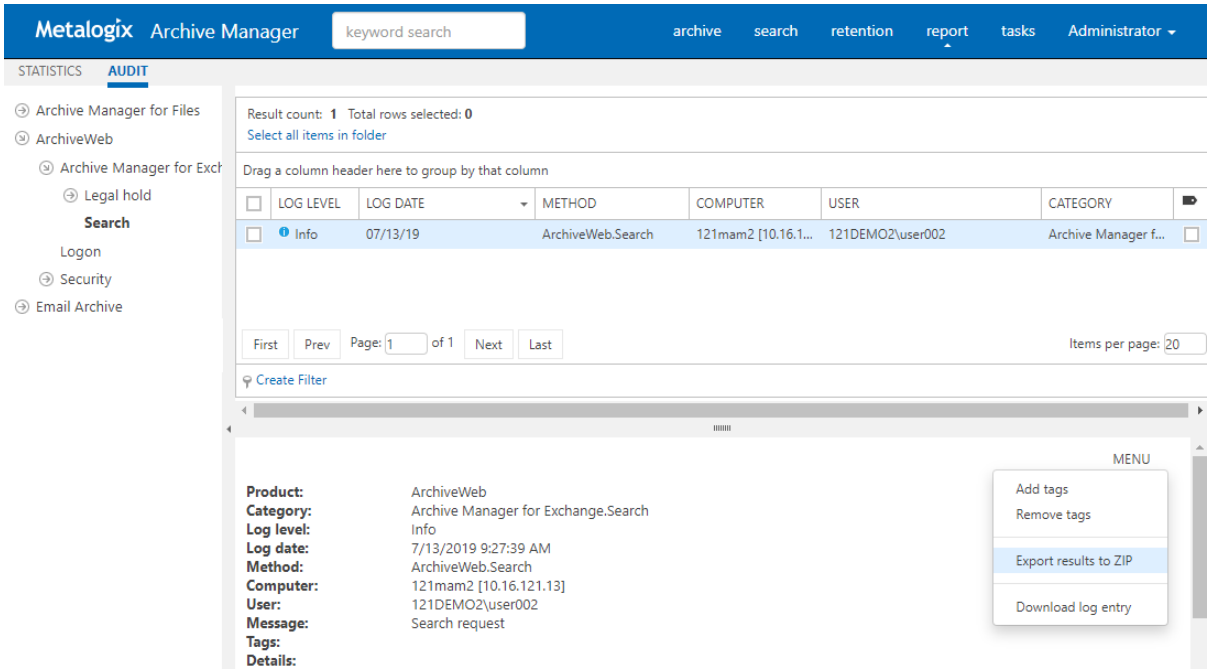
This tab is accessible if:

- Auditing is configured (see the “Auditing” manual) and
- logged-on user has Auditing permissions activated

Auditing feature allows administrator (or other users defined in web config) to log defined user actions in the email archive, i.e. the administrator has an overview of archived / restored / retrieved emails and performed keyword searches. Even all actions made in Enterprise Manager console (both for Archive Manager for Exchange and for Files) are logged.

To view the logs, from the main pane click **Report**, then **Audit** from the grey sub-bar. Then unfold the **Email Archive** node to access the Archive Manager for Exchange logs or **Archive Manager for Files** node to access the Archive Manager for Files logs. Then you can browse through different types of logs – archive actions (Archive node), retrieve actions (Retrieve node) etc.

NOTE: Not all **Audit** tab functions may be available for the logged-on user. The functions must be allowed for the user. For more information see the **Roles** and **Permissions** sections.



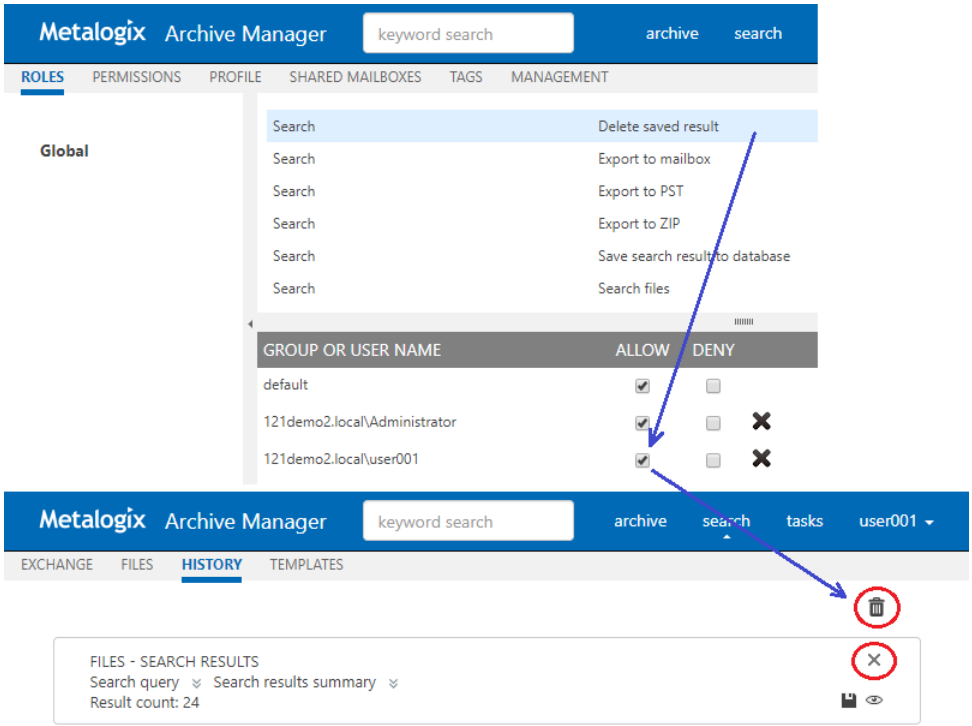
The log entries of the selected action are displayed in the main pane. Data of the log entry selected in the main pane are displayed below the list view (see the screenshot above).

Audit Search

Special settings are available for **Email Archive**/ **Search** logs. Every search action is logged in the auditing log. By default user sees only its own search result logs displayed. To make all users' search logs available for the user, s/he must have "Access all mailboxes" permission allowed for Auditing (under **<LoggedOnUser>/ Manage Settings/ Roles**).

To check your auditing search:

1. Perform search
2. Preview and export the search result by permission
3. deactivate the "Delete" functionality for user (under <Logged on user> / Manage settings / Roles)



List view conventions

List view functions are the same as in other ArchiveWeb lists:

- Change the column sorting order by selecting the given column header and clicking its down/up arrow on the right (in case the arrow is not visible adjust the width of the column by dragging the line)
- Group table data by any column. To do so, drag the column header to the bar right above the table. Generated groups can be expanded by clicking the arrows next to them. As usual, the sorting order can be changed by clicking the little arrow in the dragged column header.

Any audit entry can be downloaded or tags can be added or removed from it. All tasks are available through the **More actions** menu. Click the **More actions** menu button located on the bottom right just below the list view. Then you can e.g:

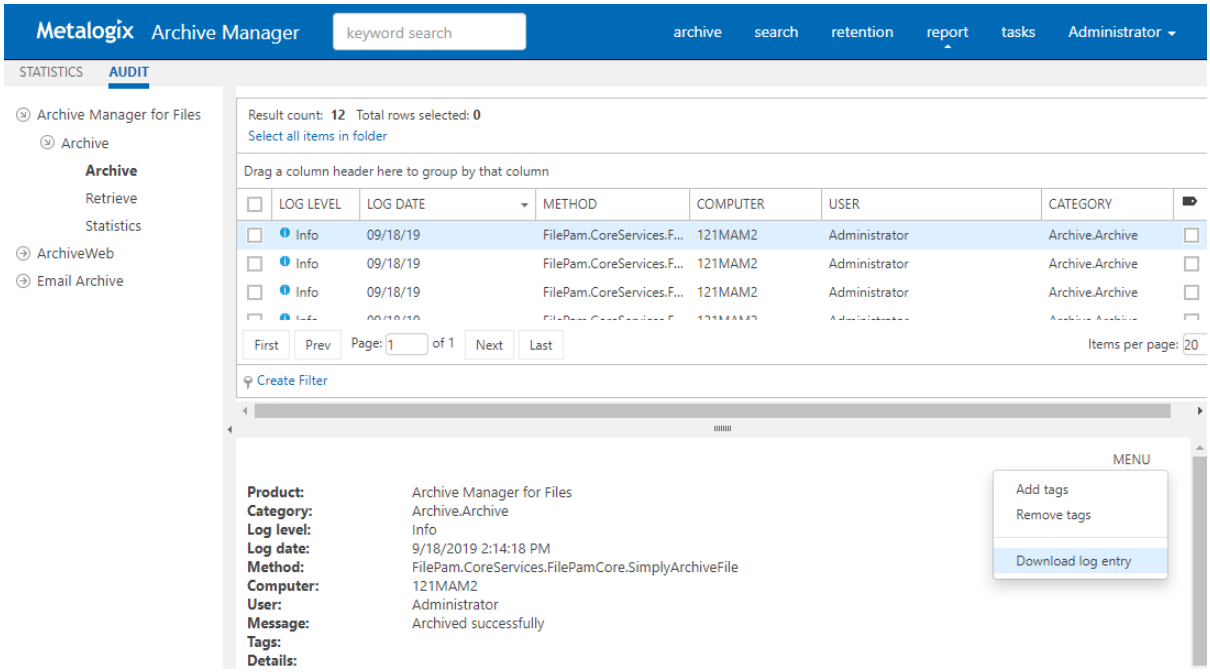
- **Add tags** or **Remove tags** : these options allow you to add or remove tags from selected items (for more information on tags see the “Tagged items tab” section)
- **Export results to ZIP** (only for ArchiveWeb/Archive Manager for Exchange/Search or ArchiveWeb/Archive Manager for Files/Search entries); this option will export search result items with summary to Excel file and allow to download the created ZIP to the user's local machine.

  NOTE: This function is only available if the user has “Export results to ZIP” role allowed for Audit (under **<LoggedOnUser>/ Manage Settings/ Roles**).

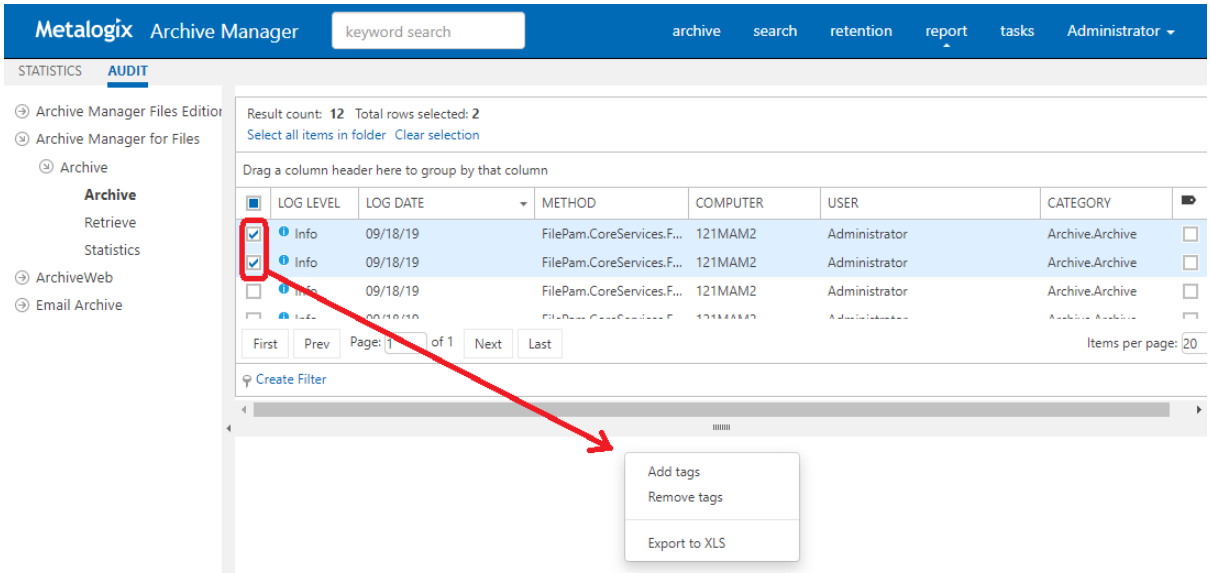
- **Export to XLS**: this option will export selected items to XLS file on the user's local machine and provide a download link to the same file.

NOTE: When downloading large amount of items it is reasonable to split the data in more XLS files. To do this value for the key "ItemsPerXLS" needs to be changed in ArchiveWeb's web.config file.The default value is "500000" and represents number of rows for single XLS file during the export. In order to set correct value for the key please refer to Excel limits on the page https://support.office.com/en-us/article/excel-specifications-and-limits-1672b34d-7043-467e-8e27-269d656771c3.

- **Download log entry**: this option will download single log entry in log file format on user local machine.



When two or more items are checked, the **More actions** menu appears automatically under the list view.

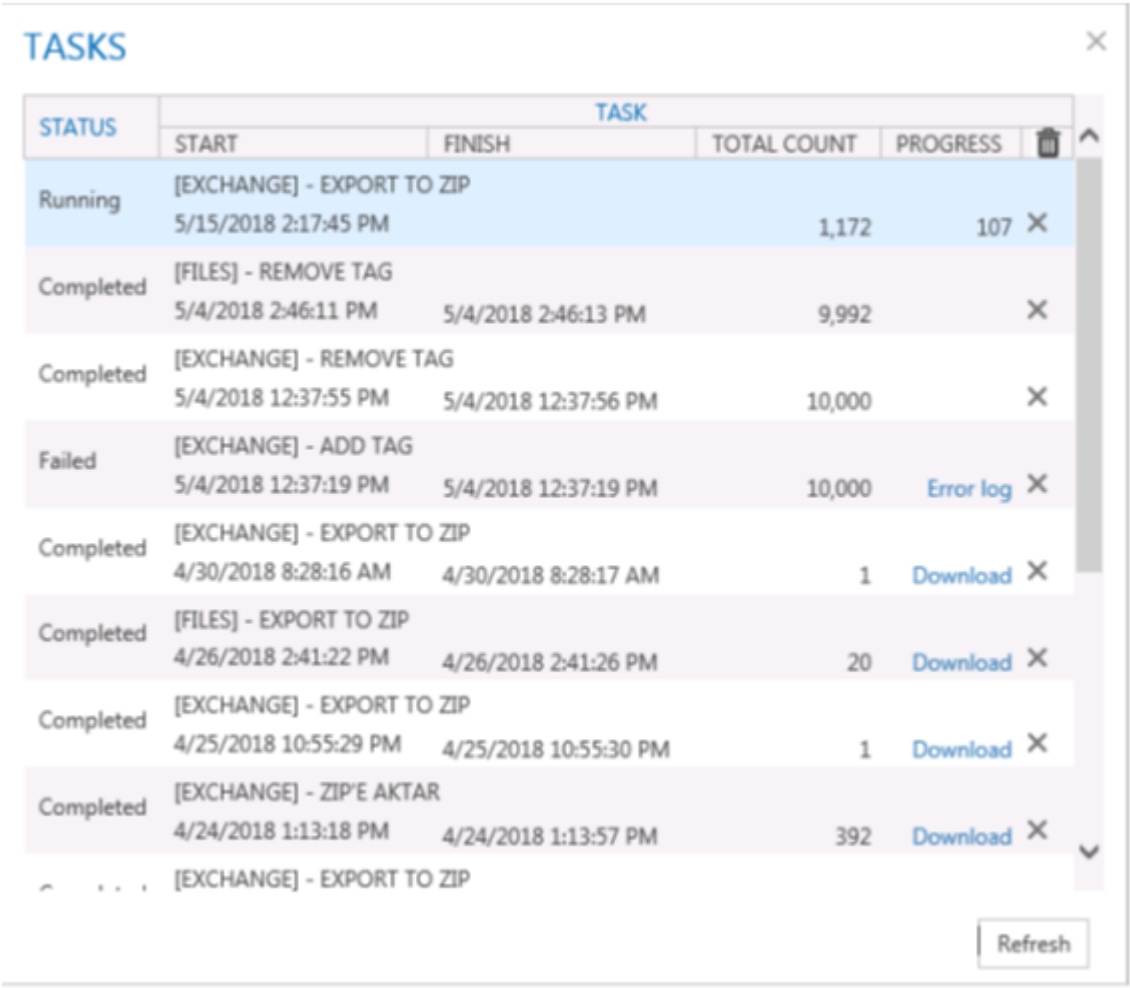


For more information on Auditing (how to install, configure it etc.) see the “Auditing” manual.

10

Tasks

Tasks option in the blue navigation ribbon at the top of the page gives the user overview of asynchronous tasks created by the logged-on user.
Tasks in the list are ordered. Running task is at the very top of the list. Then waiting tasks follow (in the order in which they will be performed, i.e. in the order in which they were created). Finally, completed and failed tasks are listed with the most recently completed task listed as first.



The list contains the following columns:

STATUS - task status can be one of the following:
- Waiting - task is waiting in the queue to be run
- Running - task is running
- Completed - task successfully completed
- Failed - task completed with errors

TASK - task's name including version name and operation name e.g. [AUDIT] - EXPORT TO XLS means that the logs from the Auditing will be exported to .xls file

START - start date when the task was started

FINISH - task's finished date

TOTAL COUNT - number of items to be processed by the task

PROGRESS - displays the progress or operation result; For export tasks such as Export to XLS, Export to PST and Export to ZIP this column displays a counter (how many items are already processed). For other operation types this column is empty. When task has finished, this column can contain download link (link to download processed items or link to download error logs.

“**trash-bin**” icon – deletes all the tasks from the list - confirmation dialog should appear with "Don't show this dialog again" check-box. If user confirms the action not to see again the dialog next tasks will be deleted and no dialog displayed for confirming the action, it is valid for current session and it's invalidated after re-login to AW and dialog will be displayed again.

"**X**" icon - deletes task from the list

Refresh button - reloading the task list; the list is automatically refreshed at specified interval (Profile / Automatic refresh interval)

NOTE: Export tasks such as "Export to ZIP" or "Export to PST" can be very resource consuming and can cause some issues, especially time-outs. To minimize these problems, see the Export Tasks IIS Settings Suggestions.

11

Addendum

- Troubleshooting
- List of Default ArchiveWeb Permissions

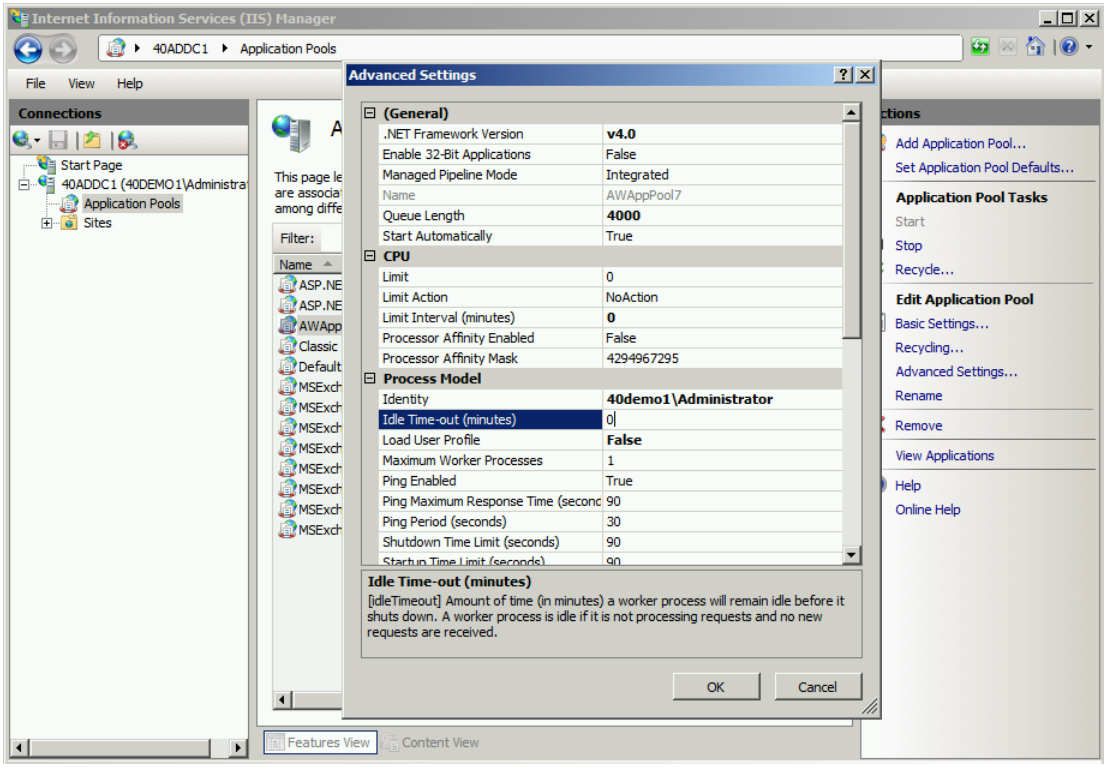
Export Tasks IIS Settings Suggestions

Export tasks such as "Export to ZIP" or "Export to PST" can be very resource consuming and can cause some issues, especially time-outs. To minimize these problems, try configuring the following settings:

Process Model - Idle Time-Out

Modify the Idle Time-Out setting for *AWAppPool7*, *FilePAMAppPool* and/or *EPAMAppPool4* application pools in the IIS.

For example: Go to IIS -> Server Name -> Application Pools -> AWAppPool7 and click **Advanced settings**. Set the value to zero.

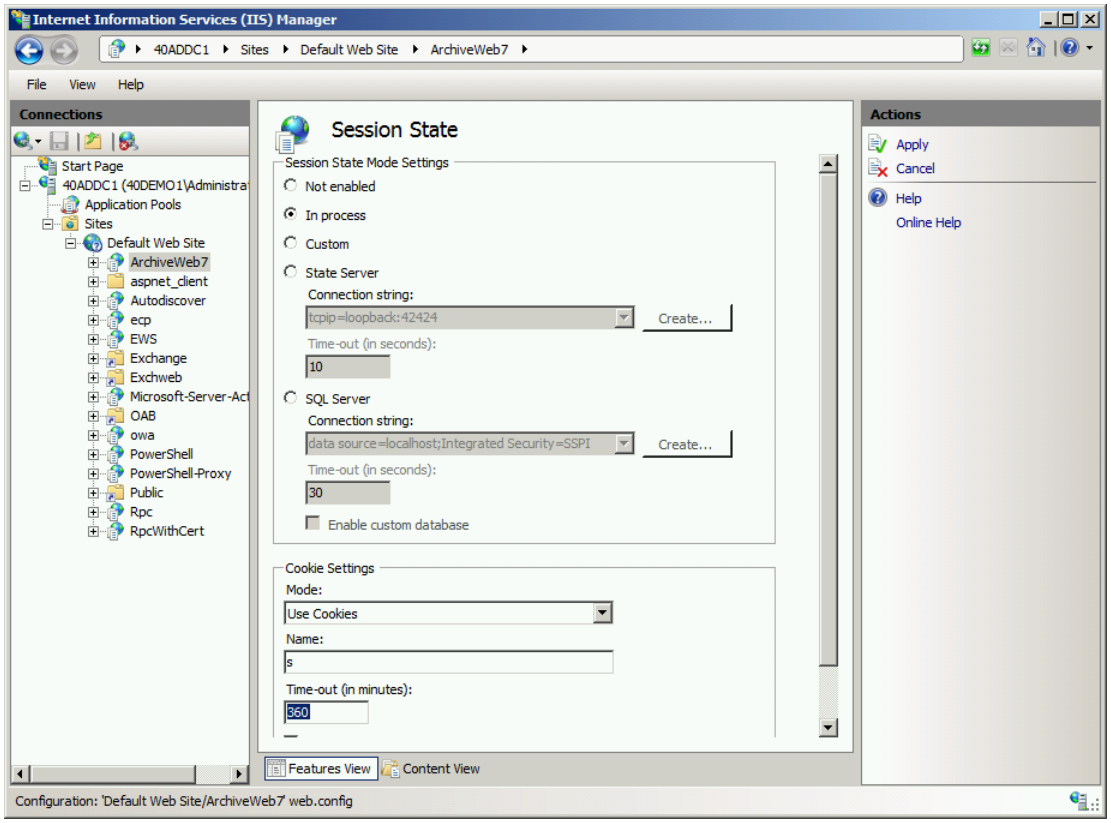


Web Sites - Session Time-Out

Export task can run several minutes or hours. When the task is running a session time-out can occur. This will cause the failure of the task operation.

To prevent this from happening, modify the **Time-out** setting for *ArchiveWeb*, *ExchangePAMWS* and/or FilePAMWebService web sites in the IIS to large enough number.

For example: Go to IIS -> Server Name -> Sites -> Default Web Site -> ArchiveWeb click on **Session State**



Please note: for ArchiveWeb web application – make sure the "sessionState" setting in web.config is synchronized with IIS' cookie time-out. Application session time-out will expire when the IIS' cookie time-out value is reached therefore for correct ArchiveWeb functionality the "sessionState" in web.config should be set to same or lower value.

Troubleshooting

This section offers solutions to most common problems users can encounter in relation to new ArchiveWeb.

IIS Error 403 Forbidden

When this error occurs after installing/updating the ArchiveWeb application it is necessary to run the following commands from the command line to re-register the .NET Framework:

```
c:\WINDOWS\Microsoft.NET\Framework\v4.0.30319\aspnet_regiis.exe –iru
c:\WINDOWS\Microsoft.NET\Framewrok\v4.0.30319\iisreset
```

12

About Us

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

Contacting Quest

For sales or other inquiries, visit www.quest.com/contact.

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