

Metalogix[®] Archive Manager for Files 8.5

ArchiveWeb Guide



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Legend

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

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

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About ArchiveWeb

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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

Requirements

System requirements

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

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:

- <u>Steps to install automatically with the product installer</u>
- Steps to install manually with the ArchiveWeb installer
- <u>Steps to verify the installation</u>

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.

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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.

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

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

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

6. Click Next. The Installation Components window opens.

Archive Manager Installation Wi	zard		×
WELCOME PLANNING	Installation Components	E	<u>lelp</u>
INSTALLATION		Setup Installed version version	
SETUPS		8.5.0.58 8.5.0.58 8.5.0.58 8.5.0.58	
	Archive Manager for Exchange 8.	8.5.0.58	
	Archive Manager Search 8.	8.5.0.58 8.5.0.58	
	ArchiveWeb 8.	8.5.0.58	
	Product description: ArchiveWeb offers an intuitive interface to access archived data and provides search templates, adva		and
	categorization abilities, legal hold, full auditing, 3rd party export and collaborative eDiscovery review c Installation of ArchiveWeb without Archive Manager is not supported. Installation folder: C:\Program Files 4x86)\Metalogix	capabilities. Brows	20
Metalogix	Riskulador Folder. e. a regrain free yeer ankalegik	Next > Cance	

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.

l Archive Manager Installation	Wizard		×
WELCOME	Checking Prerequisites		<u>Help</u>
Planning INSTALLATION TOOLS	Microsoft Data Access Components Version 10.0 of MDAC was detected.	4	
SETUPS	User Permissions User DEMOCORP\domadmin has all the necessary permissions.	•	
	Microsoft Windows Features And Roles All the necessary Microsoft Windows Features And Roles are installed.	4	
	Install		
Metalogix		< Back Next >	Cancel

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

leader Installation Wi	zard			х
WELCOME PLANNING	Superuser Account			<u>Help</u>
INSTALLATION TOOLS SETUPS	have admin rights on Archive Man the domain, then this user should e this account.	ager's databases and Exchange server. If	nning. It must be a local administrator and must you have more than one Exchange server in f Exchange. Please specify the credentials for	
	Re-type password:			
Metalogix			< Back Next > Car	ncel

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

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

stallation Wi Archive Manager Installation Wi	zard		×
WELCOME PLANNING	ArchiveWeb Settings		<u>Help</u>
INSTALLATION TOOLS SETUPS	MultiTenant Web Service URL: Archive Manager for Exchange Exchange Web Service URL: Archive Manager for Files Files Web Service URL:	http://AMXSERVER/MultiTenantWS/MultiTenantWS.svc http://AMXSERVER/exchangePAMWS/exchangePAMWS.asmx http://AMXSERVER/FilePAMWebService/GetFile.aspx	
	 Archive Manager Search Search URL: Archive Manager Auditing 	tcp://AMXSERVER:8228/PamSearch	
	Auditing Server Name: Auditing Server Port:	AMXSERVER	
Metalogix		< Back Next > Car	ncel

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.

11

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

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

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

stallation W Archive Manager Installation W	izard	х
WELCOME	Summary Installation	<u>Help</u>
PLANNING	This is the installation summary.	
INSTALLATION		<u>^</u>
TOOLS	Product name: HSM Version: 8.5.0.58	
SETUPS	Installation folder: C:\Program Files (x86)\Common Files\PAM\HSM HSM schema name: FilesSchema HSM store path: C:\HSM Product name: Archive Manager for Files Version: 8.5.0.58 Installation folder: C:\Program Files (x86)\Metalogix\Archive Manager for Files Product name: Archive Manager Search Version: 8.5.0.58 Installation folder: C:\Program Files (x86)\Metalogix\MAMSearch Search Index folder (AM for Exchange): C:\Program Files (x86)\Metalogix\MAMSearch\Index\Mail Search Index folder (AM for Files): C:\Program Files (x86)\Metalogix\MAMSearch\Index\Index\Index Search Index folder (AM for Files): C:\Program Files (x86)\Metalogix\MAMSearch\Index\Index\Index Search Index folder (AM for Files): C:\Program Files (x86)\Metalogix\MAMSearch\Index\File Components to be installed: Product name: ArchiveWeb Version: 8.5.0.58	
	Installation folder: C:\Program Files (x86)\Metalogix	
Metalogix	< Back Install >	Cancel

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.

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

- 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..

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

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.

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

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

14

ArchiveWeb	×
License Agreement	
Please read the following license agreement carefully.	
Press the PAGE DOWN key to see the rest of the agreement.	
Software Transaction Agreement	^
PLEASE READ THIS AGREEMENT CAREFULLY BEFORE USING THIS PRODUCT. BY DOWNLOADING, INSTALLING OR USING THIS PRODUCT, YOU ACCEPT AND AGREE TO THE TERMS AND CONDITIONS OF THIS AGREEMENT. FOR ORDERS PLACED OUTSIDE THE UNITED STATES OF AMERICA, PLEASE GO TO http://quest.com/legal/sta.aspx TO VIEW THE APPLICABLE VERSION OF THIS AGREEMENT FOR YOUR REGION. IF YOU DO NOT AGREE TO THE TERMS AND CONDITIONS OF THIS AGREEMENT OR THE APPLICABLE VERSION OF THIS ACREEMENT FOR YOUR DECIME DO NOT DOWNLOAD. WISTALL OR USE THE	E D D S S S
Do you accept all the terms of the License Agreement? If you select No, the setup will dose. To install ArchiveWeb, you must accept this agreement.	
InstallShield	
< <u>B</u> ack <u>Y</u> es <u>N</u> e	>

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

ArchiveWeb		×
	Vestination Location Ilder where setup will install files.	
	Install ArchiveWeb to: C: \Program Files \Metalogix \ArchiveWeb	<u>C</u> hange
InstallShield -	< <u>B</u> ack <u>Next</u> >	Cancel

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

hiveWeb	
ArchiveWeb installation settings Which Archive Manager Edition is installed in	your environment?
Archive Manager for Exchange	
Archive Manager for Files	
MultiTenant Web Service URL:	
http://localhost/MultiTenantWS/MultiTenan	itWS.svc
Exchange Web Service URL:	
http://AMXSERVER-X/exchangePAMWS/ex	changePAMWS.asmx
Files Web Service URL:	
http://AMXSERVER-X/FilePAMWebService/	GetFile.aspx
Note: If you select any option, the respectiv	ve fields must be filled in before clicking Next.

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.

ArchiveWeb installation settings		
Which Archive Manager component is install environment?	ed in your	
Archive Manager Auditing		
Auditing Server Name:		
AMXSERVER-X		
Auditing Server Port:		
7783		
🗹 Archive Manager Search		
Search URL:		
tcp://AMXSERVER-X:8228/PamSearch		
Note: port number should be between 1 <-	> 65535	
stallShield		

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.

ArchiveWeb				×
ArchiveWeb site port Please define the Archi				
ArchiveWeb web site p	ort:			
80				
Port number is used fro InstallShield	m another installed Me	talogix product, I	Not allowed to ch	ange the port
		< <u>B</u> ack	<u>N</u> ext >	Cancel

10. Click Next. The Logon Information window opens.

ArchiveWeb	×
Logon Information Specify a user account and password.	
Specify the user account to be used by this application. User accounts m DOMAIN\Username.	ust be in the format
User name:	
democorp\domadmin	
Password:	
••••••	
Confirm password:	
•••••	
InstallShield	
<pre>Instalishield</pre>	> Cancel

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.

ArchiveWeb	×
Ready to Install the Program The wizard is ready to begin installation.	
Click Install to begin the installation.	
If you want to review or change any of your exit the wizard.	r installation settings, click Back. Click Cancel to
InstallShield —————	< Back Install Cancel

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

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

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 <u>Configuration</u>.

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.
- 4. Verify that you can login and the ArchiveWeb page as shown below is loaded successfully.

Metalogix Archive Manager ArchiveWeb	keyword search	archive	search	retention	report	tasks	Administrator 👻
Click he	Select an area you w re to configure default home		vhen I sign i	n.			

Configuration

In this chapter:

- <u>ArchiveWebSetup</u>
- <u>Multi-factor Authentication</u>
- <u>Search Scopes</u>
- 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*).)

🞇 Configuration		
Configure Archi	veWeb	ArchiveWeb Multi-factor authentication
ArchiveWeb	😰 ArchiveWeb Configura	lion
	Tenant service location:	http://localhost/MultiTenantWS/MultiTenantWS.svc
auditing	AM for Exchange service:	http://AMXSERVER-X/ExchangePAMWS/ExchangePAMWS.aspx
🛐 ным	AM for Files service:	http://AMXSERVER-X/FilePAMWebService/GetFile.aspx
	Search service location:	tcp://AMXSERVER-X:8228/PamSearch
of Users	Search cache folder:	C:\Program Files\Metalogix\ArchiveWeb\SearchCache
Exchange	Export folder:	C:\Export\
O Archive Search	Export folder auto- cleanup [days]:	0 • Do not clean-up
of Post Processing	Auditing server name: Log-off time:	AMXSERVER Port: 7783
	Show offline server ca	
	Hide location server Use Multi-factor Authe	Check trusted domains 🗌 Use Single Sign-On
ß		Apply

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. <u>Create a new application in the Azure portal</u>.
- 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 (<u>https://portal.azure.com</u>). 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.

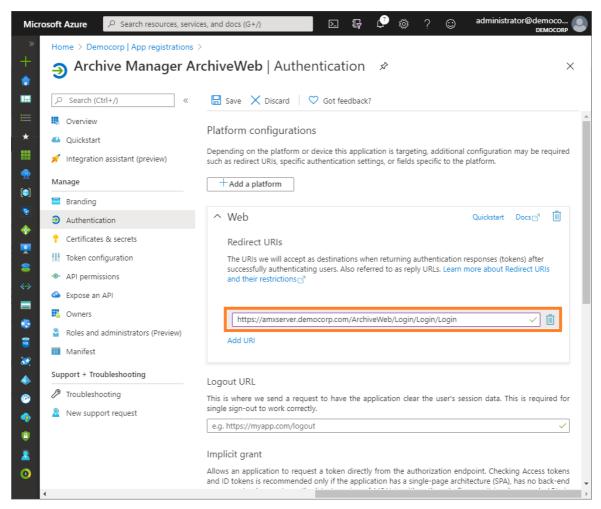
← -	C 🏠 🕯 portal.azure.com/#blade/Microsoft_AAD_IAM/ActiveDirectoryMenuBlade/RegisteredApps 🖈 👶 Incognito :
🛃 Do	wnloads 🏚 Cookies 📭 YouTube 💡 Maps 🥥 Webex 🚪 WhatsMylP 📙 News 📙 Quest 📃 Other bookmarks
Micro	DSOFT AZURE P Search resources, services, and docs (G+/) Σ 🖟 Q^2 (2) administrator@democo DEMOCORP
»	Home > Democorp App registrations >
+	Register an application ×
٠	
	* Name
≣	The user-facing display name for this application (this can be changed later).
*	Archive Manager ArchiveWeb
	Supported account types
()	Who can use this application or access this API?
	 Accounts in this organizational directory only (Quest only - Single tenant)
•	Accounts in any organizational directory (Any Azure AD directory - Multitenant)
!	Accounts in any organizational directory (Any Azure AD directory - Multitenant) and personal Microsoft accounts (e.g. Skype, Xbox)
8	Help me choose
<->	
	Redirect URI (optional)
 3 3 3 4 4 5 5 5 6 6 7 7	We'll return the authentication response to this URI after successfully authenticating the user. Providing this now is optional and it can be changed later, but a value is required for most authentication scenarios.
	Web https://amxserver.democorp.com/ArchiveWeb/Login/Login
6	
۲	
2	By proceeding, you agree to the Microsoft Platform Policies 🖙
0	Register
	()

- 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.

Mic	rosoft Azure	rices, and docs (G+/)	
» + ♠	Home > Democorp App registrations	rchiveWeb ☆	×
■ * == • • • • • • • • • • • • • • • • •	Search (Ctrl+/)	Delete Delete Endpoints Display name Archive Manager ArchiveWeb Application (client) ID 5a63bc74-921b-49e2-a522-6b2fe452eed4 Directory (tenant) ID 91c369b5-1c9e-439c-989c-1867ec606603 Object ID fb213d22-ad09-4e0f-a302-cd4b4f4a04c5 Welcome to the new and improved App registration registrations (Legacy)? Learn more	Supported account types My organization only Redirect URIs 1 web, 0 spa, 0 public client Application ID URI Add an Application ID URI Managed application in local directory Archive Manager ArchiveWeb
o 🕹 😵 🕷 🛍 🚷 🔳 🔅	 API permissions Expose an API Owners Roles and administrators (Preview) Manifest Support + Troubleshooting Troubleshooting New support request 	Call APIs	
•	4	View API permissions	

- 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.

Add a client secret	
Description	
ArchiveWeb Client Secret	
Expires In 1 year In 2 years Never	
Add Cancel	

- 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.

25

- **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**.



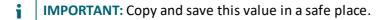
14. From the *Request API permissions* page for Azure Active Directory Graph that appears, select **Delegated permissions**.

Micr	rosoft Azure 🔎	Search resources, services, and docs (G+/)	🖓 🔅 ? 😳 administrator@democo 🧶
»	Home > App regis	Request API permissions	×
+	- Archive I	✓ All APIs	
		What type of permissions does your application require?	•
	 Overview Quickstart 		ion permissions olication runs as a background service or daemon without a n user.
	Manage	Select permissions	expand all
2	Branding	Type to search	
	Authentication	PERMISSION	ADMIN CONSENT REQUIRED
	📍 Certificates & 🛙	▶ Directory	
•	API permission	Group	
	Expose an API	• Member	
8	R Owners		
<>	🎴 Roles and adm	Policy	
	0 Manifest	▼ User (1)	
8 8	Support + Troubles	☑ User.Read Sign in and read user profile ●	
	🗙 Troubleshootir—		
	 New support n 	Add permissions Discard	

- 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.

Add a scope	>
You'll need to set an Application ID URI before you can add a permission. We've chosen on but you can change it. * Application ID URI @	<u>,</u>
api://85868bd2-51e9-45d9-b6ca-f482ba3889c1	

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.



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

Add a scope		×
* Scope name 🚯		
Messages.Read	~	
api://85868bd2-51e9-45d9-b6ca-f482ba3889c1/Messages.Read		
Who can consent? 👩		
Admins and users Admins only		
* Admin consent display name 👩		
Read access to user messages	~	
* Admin consent description 👩		
Allow application to read user messages	~	
User consent display name 6		
Grant read access to my messages	~	
User consent description 👩		
Allow application to read my messages		
State O		
Enabled Disabled		
Add scope Cancel		

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.

ArchiveWeb ArchiveWeb Multi-factor authentities Image: Configure ArchiveWeb ArchiveWeb Configure ArchiveWeb Configure ArchiveWeb Multi-factor authentities Image: Configure ArchiveWeb ArchiveWeb Configure ArchiveWeb Configure ArchiveWeb Configure ArchiveWeb Multi-factor authentities Image: Configure ArchiveWeb ArchiveWeb Configure ArchiveWeb	
ArchiveWeb Tenant service location: http://localhost/MultiTenantWS/MultiTenantWS.svc Auditing AM for Exchange service: http://AMXSERVER/exchangePAMWS/exchangePAMWS.asmx Image: Search service location: http://AMXSERVER/exchangePAMWS/exchangePAMWS.asmx Image: Search service location: tcp://AMXSERVER:8228/PamSearch Image: Search cache folder: C:\Program Files (x86)\Metalogix\ArchiveWeb\SearchCache	tion
Auditing AM for Exchange service: http://AMXSERVER/exchangePAMWS/exchangePAMWS.asmx Image: Search service: Search service: Search service: Image: Search service: Se	
All for Exchange service: Intp://AllXSERVER/ExchangerAllWVS/exchangerAlllWVS/exchangerAllWVS/exchangerAllWVS/exchangerAllLLWVS/e	
Search service location: tcp://AMXSERVER:8228/PamSearch Exclinange Archive Search cache folder: C:\Program Files (x86)\Metalogix\ArchiveWeb\SearchCache	
Search service location: tcp://AMXSERVER:8228/PamSearch Search cache folder: C:\Program Files (x86)\Metalogix\ArchiveWeb\SearchCache	
Aveilitive Search cache toider: C: Program Hies (X86) (WetalogX (Archive/Web (Search Cache	
Export folder: C:\Export\	
Export folder auto- cleanup [days]: 0 = Do not clean-up	
Export one version per document during PST export	
Auditing server name: AMXSERVER Port: 7783	
Log-off time: 20	
Show offline server caption Check linked mailboxes Vuse cache for views	
☐ Hide location server 🔽 Check trusted domains ☐ Use Single Sign-On	
Use Multi-factor Authentication	

- 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.

😤 Configuration			
Configure Archi	veWeb	ArchiveWeb	Multi-factor authentication
ArchiveWeb	🕼 Hulti-factor authentication Configuration		
Auditing	Organization name in Office365 (org.onmicrosoft.com) democorp.onmicrosoft.com		
可 Users	Client ID (see Azure application) 5a63bc74-921b-49e2-a522-6b2fe452eed4		
Fichange Archive	Client Secret (see Azure application) H0H1PnT7eWO38ScjC@BpVzIvPq:./8wk		
R			
			Apply

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.

Configuration		×
Add ar	chive server connection	
Server name:	AMXSERVER	
Туре:	Exchange Archive Server 🔹	
	< Pack Nevt > Capcal	
	< Back Next > Cancel	

Enter the information and described below:

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

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

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

Database configuration		×
Database Connection Wiza	rd	2
Set up your Microsoft SQL Se	erver connection.	
Please enter parameters which will be		
Server name:	AMFDB	
Initial catalog:	MAMFILE	
Schema name:	dbo	
Authentication:	Windows Authentication 🔹	
User name:		
Password:		
	< Back Next > C	ancel

For Microsoft SQL Server

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

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

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

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

- 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.

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

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

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

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.

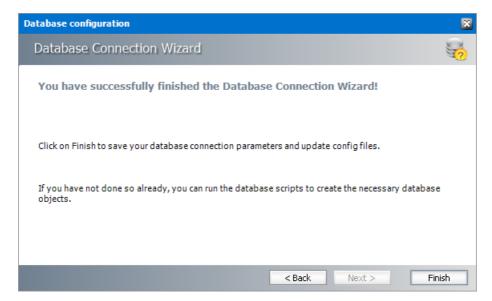
For Oracle

- 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.

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

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.

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

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

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

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.

Co	onfiguration 🛛
	Apply the configuration changes
	Click on Finish to save the configuration settings.
	Click on Finish to save the configuration settings.

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**.

🛠 Configuration	
Configure Sear	ch Database Search Scopes Connectivity
ArchiveWeb Audiling Audiling H5M Files Archive Users	Database Search scopes Connectivity
Exchange Archive Search Post Processing	Configuration summary Server type: Files Archive Server name: AMXSERVER Database: AMXSERVER\MAMFILE Index directory: C:\Program Files (x86)\Metalogix\MAMSearch\Index\File
	Add Remove Configure

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

Restart	service 🔀		
The MAM Search service must be restarted in order to apply the configuration changes.			
	Would you like to restart it now?		
Do not show this message again			
	Yes No		

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.

i 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:

<u>Steps to configure Post Processing Scopes</u>

Steps to configure Post Processing Scopes

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

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

Enter the information and described below:

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

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.

i 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
- <u>Activating compliance</u>
- Granting compliance permissions to users
- <u>Viewing agreements</u>
- <u>Configuring templates</u>
- <u>Configuring compliance settings</u>
- <u>Accepting compliance agreements</u>

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:

😤 Configuration					- 0 ×
Configure Users	5			Database	SMTP Configuration
archiveWeb	🔀 SMTP Configura	tion		_	
auditing	Server name: Port:	25	Use SSL]	
可 нам	User name:]	
可 Files Archive	Password:]	
🕡 Users 🕨 🕨	Sender email:]	
archange Archive	Number of retries:	6 :			
5Earch					
SHIP Service					Apply

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**.

	Uther options	
Track changes in file permissions	Activate compliance permissions	
License information		Apply Refresh
🚨 General 🦪 Notification 🛛 🍿 File compr	ession 🏽 🎒 User management 🛛 👸 Storage	

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

Metalogix Archive Manager Archive	Web keywor	d search	archive	search	retention	report	tasks	Administrator 🗸
ROLES PERMISSIONS PROFILE SHARED MAILBO	XES TAGS MANA	AGEMENT						
L L-	DEMOCORP.CO	OM\DOMADMIN (ADI	MINISTRA	TOR)				
domadmin (Administrator) [democorp.com]				ALLOW	DENY			A
davidwebb (David Webb) [democorp.com]	Auditing	Access all mailboxes		~				
	Auditing	Apply tags		✓				
	Auditing	Auditor access						
	Auditing	Export auditing logs		✓				
	4 Auditing	Export results to ZIP		✓				
	Auditing	Show auditing logs		✓				
	Compliance	Allow policy managed downle	pad	Z				
	Compliance	Compliance management						
	Exchange	Add comments to mails		~				
	Exchange	Apply tags		~				
	Exchange	Compare mailbox with archiv	e	~				-
	+ x 🤊							

- 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.

AGREEMENTS		Result count: 10	sult count: 10							
TEMPLATES		Drag a column header	here t	o group by that column						
ETTINGS		USERNAME		EMAIL ADDRESS	AGREEMENT DATE	STATUS		EXPIRATION DATE		
			9	9	- 9		9		+ 9	
		(Not set)		(Not set)		New				
		Administrator		domadmin@democorp.co		New				
		Aman Ali		amanali@democorp.com		New				
		David Webb		davidwebb@democorp.co		New				
	4	Ishna Mohan		ishnamohan@democorp.c		New				
		Juan Christie		juanchristie@democorp.c		New				
		Karl Jordan		karljordan@democorp.com		New				
		Niki Portman		nikiportman@democorp.c		New				
		Pablo Neruda		pabloneruda@democorp		New				
		Tim Ashford		timashford@democorp.co		New				
		Page 1 of 1 (10 iter		timashtord@democorp.co		New				

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**.

Metalogix Archive N	Manager ArchiveWeb	keyword search	archive	search	compliance	retention	report	tasks	Administrator 🗸
AGREEMENTS TEMPLATES SETTINGS	ACCESS DENIED Subject: Message:	Normal -	$\approx $ $\gg $ $\chi^2 $ $\chi_2 $ $\models $ \vdots $ Arial$		😪 😪 🖬 🏭 Font Size) 🔹		S E E	≣ ∰ .	
		DESIGN HTML F	PREVIEW						i
	REMINDER Subject:								
	Message:	장 합 🛍 🛱 이 여 Normal 🔻	∼ " X² X₂ 1 = 1 Arial		Font Size) 🔻		S 표 표	∃ †ì, •	
		DESIGN HTML F	PREVIEW						:: Save

- 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**.

Metalogix Archive M	lanager ArchiveWeb	keyword search	archive	search compliand	e retention	report	tasks	Administrator 🗸
Metalogix Archive M Agreements Templates SETTINGS	Agreement term: Remind user before expiration: Policy:	0	$\begin{array}{c} & \\ & \\ & \\ & \\ \end{array} \end{array} \begin{array}{c} & \\ & \\ & \\ & \\ \end{array} \begin{array}{c} & \\ & \\ & \\ & \\ & \\ \end{array} \begin{array}{c} & \\ & \\ & \\ & \\ & \\ & \\ & \\ & \\ \end{array} \begin{array}{c} & \\ & \\ & \\ & \\ & \\ & \\ & \\ & \\ & \\ & $	hs ☶ 🔇 🔇 🖂 ☷ -				Administrator -
		DESIGN HTML	PREVIEW				.:	Save

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).

AGREEMENTS TEMPLATES	Agreement term: Remind user before expiration: Policy:	CANCEL AGREE		eiusmod tem on ullamco l oluptate velit	t v S I	t ut labore e aliquip ex e tolore eu fu	t <u>dolore</u> a giat nulla	
								Save

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.

POLICY AGREEN	MENT	
Email address:	user001@107demo4.local	^
Policy:	Before you continue to ArchiveWeb Accept these rules to allow access to archived files.	
l agree:		↓ Save

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

🚳 Options X 64 63 Options User Roles Administrative Roles Server settings 223 Allow Deny 🐍 40DEMO2\Administrator ~ Logon \square Archiving settings ~ Logon to PST Importer \square Modify roles ~ Message classes ~ \square Access mailbox browser Modify mailbox permissions ~ \square User Roles OK Cancel Apply

Please note: Super-user is specified in:

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

44

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

Enterprise Manager					×
Home 40ADDC2					
Archive	Manage Archive Manager for Files	s user's permissions			
	Name:	Permissions:	Allow	Deny	
22	40DEMO2/Administrator	All			
Scheduler Restrictions		Archive and Restore Archive / Restore Archive View Search & Export Restore a version Mark / unmark for deletion	KK		
Settings Post Processing Statistics		Manage jobs Archive, Archive Forecast Delete Direct Archive Shortcut Creator Shortcut Converter Synchronization Change filters	KKKK		
		Channe restrictions			
	Add Remove	Apply	Undo	Refresh	
	🐰 General 🦪 Notification 🏾 🏺	File compression 🛛 🎉 User management	t 🛛 😿 Sto	prage	

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 (4) 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 (X) 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.

Metalogix Archive			archive	search	retention	report	tasks	Administrator
PERMISSIONS PRO								
Global	Auditing	Apply tags						
Ciobal	Auditing	Auditor access						
	Auditing	Export auditing logs						
	Auditing	Export results to ZIP						
	Auditing	Show auditing logs						
	Exchange	Add comments to mails						
	Exchange	Apply tags						
	Exchange	Compare mailbox with archive Delete item						
	Exchange	Restore items						
	Exchange	Set "Legal Hold" flag						
	Exchange	Show "Legal hold" flag						
	4	show Legarnoid hag						
	GROUP OR USER NAME	ALLOW DENY						
	default							
	121demo2.local\Administrator	>	٢					
	121demo2.local\user001	>	٤					
	0 4+							

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. Superuser 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:

Metalogix Archive Manager ArchiveWeb archive search retention report tasks Administrator keyword search ROLES PERMISSIONS PROFILE SHARED MAILBOXES TAGS MANAGEMENT DEMOCORP.COM\DOMADMIN (ADMINISTRATOR) 2 2 PERMISSIONS domadmin (Administrator) [democorp.com] File management Management ✓ davidwebb (David Webb) [democorp.com] Management Logon in ArchiveWeb Management Manage scheduler < Management Search servers management Image: A set of the Retention Approve retention change requests Create retention change request ☑ □ Retention Delete saved result Search Export to mailbox Search Image: Export to PST **~** Export to ZIP ☑ □ Search Search Restore items < □ Search Save search result to database **+ X** ツ

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.

ROLES PERMISSIONS PROF	ILE TAGS MA	NAGEMENT			
Administrator (Administrator) [A'	TEST (TESTE PERMISSIONS	R ONE) [AW]			
test (Tester One) [AW]			ALLOW	DENY	,
test1 (Test User1) [AW]	Exchange	Set "Legal Hold" flag	V		
test2 (Test User2) [AW]	Exchange	Show "Legal hold" flag			
	Exchange	Show lost data	\checkmark		
	Exchange	Compare mailbox with archive	\checkmark		
	Exchange	Apply tags	\checkmark		
	Exchange	Add comments to mails			
	Exchange	Show comments	\checkmark		
	Exchange	Delete item	V		
	Exchange	Restore items	\checkmark		
	Files	Set "Legal Hold" flag	\checkmark		

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 username, logon-name or display-name. Asterisk (*) wildcard can be used. **Note:** Office 365 users need to be previously imported via Archive Manager for Exchange.

FIND USERS OR GROUPS

 \times

☑ Office 365 user

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**.

Search

- 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 (**4**) 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.

🚥 Login - Archive Manager Archive' 🗙 🕂	
← → C () localhost/ArchiveWeb7/Login/L	agin/Lagin?ReturnUrl=%2FArchiveWeb7%2F 🖈 😝 :
Metalogix	Archive Manager ArchiveWeb ● Auditor access User name: domain/username or email address Password: password: password password password password password

- 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.

Metalogix Archive Manager	keyword search	archive		ention	report	tasks	Administrator -
DLES PERMISSIONS PROFILE SHARED	D MAILBOXES TAGS	MANAGEMENT					
4.4	124DEMO1.LC PERMISSIONS	DCAL\USER001					
Administrator [124demo1.local]			ALLO	W DENY	r		
user001 [124demo1.local]	Auditing	Access all mailboxes		•			
	Auditing	Apply tags			_		
	Auditing	Auditor access		•			
	Auditing	Export auditing logs					
	Auditing	Export results to ZIP					
	+ Auditing	Show auditing logs		•			
	Exchange	Add comments to mails					
	Exchange	Apply tags	V				
	Exchange	Compare mailbox with archive	×				
	Exchange	Delete item		•			
	Exchange	Restore items		•			
	Exchange	Set "Legal Hold" flag		•			
	Exchange	Show "Legal hold" flag					

- 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**.

ROLES PERMISSIONS PROFILE SHAF								
å. å.	124DEMO1 PERMISSION	LOCAL\USER001						
Administrator [124demo1.local] user001 [124demo1.local]	Auditing	Access all mailbo	oxes		ALLOW	DENY Ø		
	Auditing					Ø		
	Auditing	Auditor access		- 1	Z			
		PERMISSIO	٧S	×		1		
		Set permissions for	Auditor?			ď		
		Yes	No			×.		
	Exchange					×		
	Exchange							
	Exchange	Compare mailbo	x with archive		V			
	Exchange	Delete item						
	Exchange	Restore items				×.		
	Exchange	Set "Legal Hold"	flag			Ø		
	Exchange	Show "Legal hole	d" flag					
	+ x 🤊							

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.

🚥 Login - Archive Manager Archive 🗙 🕂	_ D X
\leftrightarrow \rightarrow C (1) localhost/ArchiveWeb7/Login/Login	• ☆ ⊕ :
Metalogix	Archive Manager ArchiveWeb archive Manager ArchiveWeb archive Juser name: 124demo1\administrator duditor 2 user name: dom air\username or email address Password: password jassword jassword

- 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.

Metalogix Archive M	anager keyword search		archive		retention repo		Adminis		
EXCHANGE									
 Mailboxes Administrator [124MAM1] journal [124MAM1] 	INBOX archived shortcut lost tagged	d locked for dele	tion						
Inbox Public Folders	Result count: 2 Total rows selected: 0 Select all items in folder								
	Drag a column header here to group by the	at column							
	FROM TO		SUBJECT		RECEIVED +	RETENTION	0	₽	Ρ
	Microsoft Outlook (Ad ma	im	Testing		04/05/19		3 🗸		
	 Microsoft Outlook (Ad ma 	im	TEST		04/05/19		3 🖌		
	First Prev Page: 1 of 1 Nex	t Last					ltem:	s per pag	ge: 20
	🕈 🌳 Create Filter								
	•								÷
			Select items or click to previe	9W.					

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.

General Memb	er Of Other Advanced				
A Mailboa	properties				
RDN:	journal				
Display name:	journal				
Alias:	journal				
E-mail:	journal@124demo1.local				
Home server:	124EX1				
Addresses:	Addresses: journal@124demo1.local;				
Mailbox DN:	/o=124demo1/ou=Exchange Administrative Gro				
GUID:	F5997031DBC5D0489BC1D86442EEDDB3				
✓ Mailbox is ac	tivated				
Mailbox is or	legal hold				
Nailbox	type				
Journal					

Profile

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

In this topic:

- <u>Steps to open the Profile page</u>
- <u>Steps to set global defaults</u>
- Steps to customize the profile

PROFILE HOMEPAGE

• <u>Homepage</u>

PROFILE SETTINGS

- <u>Style settings</u>
- Tasks settings
- <u>Search settings</u>
- <u>Treeview settings</u>
- Grid settings
- File settings

- File Management settings
- <u>Audit settings</u>

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.

Metalogix Archive Mar	nager ArchiveWeb	keyword search	archive	search	retention	report	tasks	Administrator 🗸
ROLES PERMISSIONS PROFILE	SHARED MAILBOXES TAGS	MANAGEMENT						<u>^</u>
SETTINGS HOME PAGE	STYLE							
Home Page	Language:*	English (United States) - English (United States) - English english (United States) - English	· · ·		•			
	Date/Time format:	MM/dd/yy			*			
	Maximum preview size [MB]:	20						

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

STYLE	
Language:*	English (United States) - English (United States)
	* Please re-login for the changes to take effect.
Date/Time format:	MM/dd/yy 👻
Maximum preview size [MB]:	20

- 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

TASKS	
Automatic refresh interval (in seconds):	10 ‡
Delete completed task:	

- 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

SEARCH	
Show search field in header:	
Remember last mailbox / server selection:	2
Maximum number of search results:	10000
Keyword:	Exact phrase
	○ Starts with *, e.g. *test
	○ Ends with *, e.g. test*
	○ Enclosed in *, e.g. *test*
Match highlight:*	
	* This function is available only for Exchange
Match highlight color:	#FFFF80 T
Keyword search behavior:	 Search only in my mailbox
	Search in all accessible mailboxes
Set default search scope:	✓ Exchange
	✓ Files

• 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

TREEVIEW		
Maximum text length:	255	

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

Grid settings

GRID	
Paging:	 Endless paging Show paging
Journal highlight color:	#A4E3FF T
Items per page:	20

• **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

FILES		
Columns:	Archive: Name;ArchiveServer;Archived;Created;LastModified;Owner;FileSize;RetentionExpiresOn;RetentionRemainingDays; Search: Name;Path;ArchiveServer;Archived;Owner;FileSize;Version;IsLocked;IsTagged;IsCommented	▼ ▼
Use grid view:	 Simple Full 	
Navigation frame:	 TreeView ListView (pagination) 	

- 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 <u>List view conventions</u> 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

FILE MANAGEMENT			
Columns:	Scheduler:	Name; Type; Status; StartTime; RunInterval; EndDate; MaxRuntime; Notification; Operation; Activated Name; Notification; StartTime; RunInterval; EndDate; MaxRuntime; Notification; Operation; Activated Name; Notification; StartTime; RunInterval; EndDate; MaxRuntime; Notification; Operation; Activated Name; Notification; StartTime; RunInterval; EndDate; MaxRuntime; Notification; Operation; Activated Name; Notification; Name; Name; Notification; StartTime; Notification; StartTime; Notification; StartTime; Nature; Name; Name; Name; Nature;	.

- 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

AUDIT		
Columns:	Report: LogLevel;LogDate;Method;Computer;UserName;Category;IsTagged	Ŧ
Use grid view:	 Simple Full 	

- 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 <u>List view conventions</u> 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.

allboxes: All ABC	DEF GHI JKL	. MNO PQRS T						
Display Name Shared Email address Administrator [1] Yes Administrator@ew.local EM Test User1 [8] testuser1@MetalogisSoftw Dublic_MV7[100] Yes public_MV7 public_MV7[100] Yes public_MV7 Public_MV7[100] Yes testUser3[6] Test User5 [6] Yes testSeaw.local Test User1 [3] Yes test2@ew.local Test User3 [5] Yes test3@ew.local Test One [2] Yes test@ew.local								
Metalogix Archive Manager keyword search archive search report tasks Administrator Image: Comparison of the search tasks Administrator Image: Comparison of tasks Administrator Image: Comparison of tasks Image: Comparison of								
ROLES PERMIS			-			search	report tasks	Administrator 👻
	SSIONS PROFIL		-			search	report tasks	Administrator 🝷
ROLES PERMIS	SSIONS PROFIL	E SHARED MA	-			search	report tasks	Administrator 👻
ROLES PERMIS	SSIONS PROFIL	E SHARED MA	-			search	report tasks	Administrator -
ROLES PERMIS	SSIONS PROFIL I: 6 der here to group b	E SHARED MA	ILBOXES TAGS	MANAGEMENT				
ROLES PERMIS Total rows selected Clear selection Drag a column head U LOCATION	SSIONS PROFIL I: 6 der here to group b DISPLAY NAME	E SHARED MA	ILBOXES TAGS	MANAGEMENT		DOMAIN	ACCOUNT ACTIVE	
ROLES PERMIS Total rows selected Clear selection Drag a column head U LOCATION U AW7	SSIONS PROFIL 6 der here to group b DISPLAY NAME public_AW7	E SHARED MA	ILBOXES TAGS EMAIL ADDRESS public_AW7	MANAGEMENT	MAILBOX DN	DOMAIN aw.local	ACCOUNT ACTIVE	
ROLES PERMIS Total rows selected Clear selection Drag a column head V LOCATION V AW7 V AW7 V AW7 V	der here to group b DISPLAY NAME public_AW7 Test User 5	E SHARED MA	ILBOXES TAGS EMAIL ADDRESS public_AW7 test5@aw.local	MANAGEMENT	MAILBOX DN	DOMAIN aw.local aw.local	ACCOUNT ACTIVE	
ROLES PERMIS Total rows selected Clear selection Drag a column head V LOCATION AW7 V AW7 V AW7	SSIONS PROFIL der here to group b DISPLAY NAME public_AW7 Test User 5 Test User 1	E SHARED MA	ILBOXES TAGS EMAIL ADDRESS public_AW7 test5@aw.local test1@aw.local	MANAGEMENT LDAP PATH public_AW7 CN=Test User CN=Test User	MAILBOX DN /o=first organi /o=First Organ	DOMAIN aw.local aw.local aw.local	ACCOUNT ACTIVE	

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

• In Archive's mailboxes tree

Metalogix Archive M	lanager	keyword se	earch
EXCHANGE FILES			
Mailboxes			
Administrator [AW7] Administrator [AW7]			
→ Test User2 [AW7]			
→ Test User3 [AW7]	Drag a colu	mn header here to	group by th
	# F	ROM	то
Public Folders			
→ public_AW7 [AW7]			

• In Search's mailboxes grid

Metalogix Archive M	<i>l</i> anager	keyword search						
SEARCH HISTORY TEMPLAT	ES							
CRITERIA	Total rows se Select all row							
MAILBOXES	Drag a colum	Drag a column header here to group by that column						
DOCUMENT TAGS		ON DISPLAY NAME	ALIAS	EMAIL ADD				
	121MA	M2 user001	user001	user001@12				
	121MA	M2 public_121EX2	public_121EX2	mam@121d				
	121MA	M2 user002	user002	user002@12				

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.

i 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.

Metalogix	Archive Ma	anager k	eyword search	archive	search	report	Administrator 👻
ROLES PERMISS	SIONS PROFILE	TAGS MANAG	GEMENT				
Drag a column heade	er here to group by	that column					
New		TAG NAME	BACKGROUND COLOR	APPLY FOR			
Update Cancel			-		•		
Edit Delete	4 item(s)	1508TAG		le archive;Exchange arc	hive		
Edit Delete	0 item(s)	692KS		le archive			
Edit Delete	0 item(s)	888		le archive			
Edit Delete	0 item(s)	999		change archive			
Edit Delete	2 item(s)	Administrataor	Custom Color	lobal			
Edit Delete	2 item(s)	free time		le archive			
Edit Delete	16 item(s)	Marketing	#BAOOLC	Global			

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*.

Metalogia	Archive M	anager	keyword search	archive search report Administrator -
ROLES PERMIS	SIONS PROFILE	TAGS MANA	AGEMENT	
Drag a column head	er here to group by	/ that column		
New		TAG NAME	BACKGROUND COLOR	APPLY FOR
Edit Delete	4 item(s)	1508TAG	#FFFF00	File archive;Exchange archive
Edit Delete	0 item(s)	692KS	#FF6600	File archive
Edit Delete	0 item(s)	888	#5A8045	File archive
Edit Delete	0 item(s)	999	#003300	Exchange archive
Update Cancel		Administrata	#008000	Global 👻
Edit Delete	2 item(s)	free time	#2E8F0B	File archive
Edit Delete	16 item(s)	Marketing	#B900FC	Global

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.

Metalogix Archive	Manager keyword search			а	rchive	search	ta	isks	user0	01 🗸
) Mailboxes ③ user001 [121MAM2] Inbox	INBOX archived shortcut lost tag		deletion							
Sent Items	Select all items in folder									
	FROM	то	SUBJECT	RECEIVED	•	RETENTION		0	Ð	Ρ
	user001	user001 user001	"So this gruel isn't to your taste? Oh, you crows! You're s paying no attention to the varying quality of the pastura	03/29/17			3			
	user001	user001 user001	depraved. One is lured by women, another by honors, a had known and always slightly feared. He was in a woma	03/29/17			15			
	iser001 First Prev Page: 1 of 1	Next Last	backward movement. Adjutants and generals galloped a	03/29/17			9	Items	s per pag	je: 2
	⁴ ♀ Create Filter									
	"So this gruel isn't to your User001 3/29/2017 3:07:38 PM To: user001 • Version 1 • This message was sent with Low im • This message has been marked as • Tags:	iportance.	"""				Downl Restor Restor	e to toZIP	MENU MSG file EML fil	?

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

Metalogix Archive												
EXCHANGE FILES												
 Mailboxes user001 [121MAM2] Inbox 	INBOX archived shortcut lost tagge	ed locked for deleti										
Sent Items	Result count: 11 Total rows selected: 0											
	Select all items in folder	ADD TAG		×								
Public Folders	Drag a column header here to group by	Marketing				Ŧ		0	6	Ð	Q	
	user001 u	personal		Is	galloped a		9					
	user001 u	= = system) (C	ws! You're s		6					
	user001 u			V,								
	user001 u											
	user001 user001			ip	ot to Saltyk							
	First Prev Page: 1 of 1			- 1				lte	ms po	er page	e: 20	
	4 9 Create Filter			- 1								
				- 1								
	"So this gruel isn't to your ta	🕂 Add new tag								MENU		
			OK Cancel									
	User001											
	3/29/2017 3:07:38 PM											
	To: user001											
	 Version 1 This message was sent with Low impo This message has been marked as Co Tags: 											

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.

Metalogix Archive N	Manager keyword search			archive	search	tasks	user001	•
EXCHANGE FILES								
Mailboxes	INBOX							
(a) user001 [121MAM2]	archived shortcut lost ta	gged locked for de	etion					
Inbox								
Sent Items	Result count: 11 Total rows selecter Select all items in folder	ed: 0		Та	gged iten	า		
					_			
Public Folders	Drag a column header here to group	by that column				$\mathbf{\lambda}$		
	FROM	ТО	SUBJECT	RECEIVED	RETENTION	0	i 🖻 🖓)
	user001	user001	paying no attention to the varying quality of the pastura	03/29/17		3		•
	user001	user001	backward movement. Adjutants and generals galloped a			9]
	user001	user001	spectacled doctor came up to Prince Andrew, wiping his	03/29/17		3		1
	user001	user001				5		
	user001	user001	letter, but had specially inserted in the rescript to Saltyk	03/29/17	1	2		
	First Prev Page: 1 of 1	Next Last				ltem	is per page:	0
	• P Create Filter							
	"So this gruel isn't to you	r taste? Oh, you cro	ws! You're scared!" they				MENU	- 11
	User001							
	3/29/2017 3:07:38 PM							
	To: user001							
	Version 1 This message was sentrum Low in	nportance.						
	This message has been marked as	Confidential.						
	Tags: Marketing ×							-

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.

Metalogix Arcl	hive Ma	nager	keyword searc	h	archive	search	report	tasks	Adminis	strator
ROLES PERMISSIONS	PROFILE	TAGS	MANAGEMENT							
FILE MANAGEMENT ARCHIVE SERVERS SCHEDULER		Drag	g a column header her <u>New</u> <u>Update Cancel</u>	e to group by that of ARCHIVE SERVER	RETRIEVE SERV	ER	PROTOCOL	PORT	*	
SEARCH MANAGEMENT SEARCH SERVERS			Edit Delete	aw7	localhost		TCP	7777		

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).

OLES PERMISSIONS	PROFILE TAGS	MANA	GEMENT							
E MANAGEMENT ARCHIVE SERVERS SCHEDULER	Server name: a jobs reports Result count: 2	w7		T						
EARCH MANAGEMENT SEARCH SERVERS	Drag a column he		to group b	y that column	RUN INTER		MAYIMUM	NOTIFICATION	OPERATION	More actions
	DeleteExportFo		Stopped	12/15/2015 10:29:00	1 Day	12/15/2015 12:00:00		Summary	Generate repo	rt °nt
	DeleteFiles		Stopped	10/21/2015 3:41:00	1 Day	10/21/2015 12:00:00		Summary	Edit Delete	rt T
									Start Stop	

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.

ETTINGS FOLDERS					
Job name:					
Job type:	Delete			*	
	Activated				
	🗆 Email notific	cation			
Notification type:	Summary			Ŧ	
Operation mode:	Generate re	port		•	
Job schedule					
Start time:			-		
Run interval:		Day	у -		
End date:			*		
Maximum runtime:					

<u>Settings tab</u>

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.

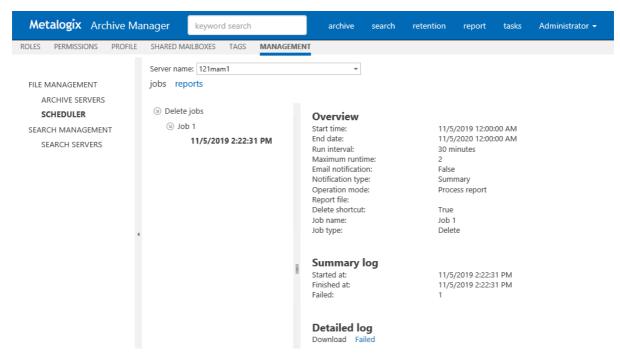
NOTE: Red check-box (\checkmark) specifies that the folder will be processed recursively.

NEW JOB	×
SETTINGS FOLDERS	
	•
Э □ C:	
🗵 🗌 TestFiles	
☑ 1000	
✓ Attributes	
Ocuments	
Huge	
Indefinite	
Japanese	
Q	
Subdir_00002	
Subdir_00003	
Subdir_00004	~
Subdir_00005	Ť
	Save Cancel

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

69

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.

Metalogix Archive Manac	jer keyword s	earch	ar	chive s	earch	report	tasks	Administrator
ROLES PERMISSIONS PROFILE TA	GS MANAGEMENT							
FILE MANAGEMENT	Drag a column heade	er here to group by	that column					
ARCHIVE SERVERS	New	SERVER	PROTOCOL	PORT		SEARCH SCOP	E ≜	FOR LOCATION
SCHEDULER	Edit Delete	aw7	ТСР	8228		EXCHANGE		1 - AW7
SEARCH MANAGEMENT	Edit Delete	aw7	TCP	8228		FILES		
SEARCH SERVERS								
	<							>
4								

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 (<u>Search Management</u>) 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

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">.

🚥 Login - Archive Manager Archive 🗙 🕂	_ D X
← → C ③ localhost/ArchiveWeb7/Login/L	ogin/Login?ReturnUrl=%2FArchiveWeb7%2F 🖈 😌 :
Metalogix	Archive Manager ArchiveWeb ● Auditor access User name: domain/username or email address Password: password password pass ign in

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 dropdown 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 "<u>File Management</u>" section).

Metalog	ix Arc	hive Mar	nager	keyword	l search		archive	search	report	tasks	Administrator 👻
ROLES PERM	IISSIONS	PROFILE	SHARED MA	AILBOXES	TAGS	MANAGEMENT					
Global											
AW7											

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.

Metalogix Archive M	anager ArchiveWeb keyword search	archive search	retention r	report tasks	Administrato	r +		
EXCHANGE FILES								
 amxserver C: Demo Files 	DEMO FILES archived lost tagged locked for deletion							
	Result count: 5 Total rows selected: 0 Select all items in folder Drag a column header here to group by that column							
		✓ SERVER	ARCHIVED DATE	CREATED DATE	LAST MODIFICATI	OW		
	Commerce-05.pdf	amxserver	12/21/20	12/21/20	12/21/20	BUII		
	Commerce-04,pdf First Prev Page: 1 of 1 Next Last	amxserver	12/21/20	12/21/20	12/21/20	BUII		
	4	UNUN				Þ		
4	File name: Commerce-05.pdf Directory: C:\Demo Files\			Download	MENU	1		
	Machine name: amxserver Created by: domadmin Created date: 12/21/2020 6:42:00 PM			Restore				
	Archived date: 12/21/2020 6:46:40 PM Owner: BUILTIN\Administrators Size: 2 MB Size on disk: 2 MB			Add tags Remove tags				
	Shortcut size: 4 KB Version: 1 Tags:			Lock document				
	1293.			Mark for deleti	on			
				Extend retentio Create retentio	n time n change request			

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

Metalogix Archive Ma	anager ArchiveWeb keyword search	archive search	retention	report tasks	Administrator 🗸
EXCHANGE FILES					
amxserver O C: Demo Files	DEMO FILES archived lost tagged locked for deletion				
	Result count: 5 Total rows selected: 2 Select all items in folder Clear selection				
	Drag a column header here to group by that column				
		SERVER	ARCHIVED DATE		LAST MODIFICATI OW
	Commerce-05.pdf	amxserver	12/21/20	12/21/20	12/21/20 BUII
	First Prev Page: 1 of 1 Next Last	amxserver	12/21/20	12/21/20	12/21/20 BUII
	4	mm			4
4		Restore			
		Add tags			
		Remove tags			
		Lock document			
		Unlock document			
		Export to ZIP			
		Mark for deletion			
		Extend retention time Create retention change reque	st		

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.

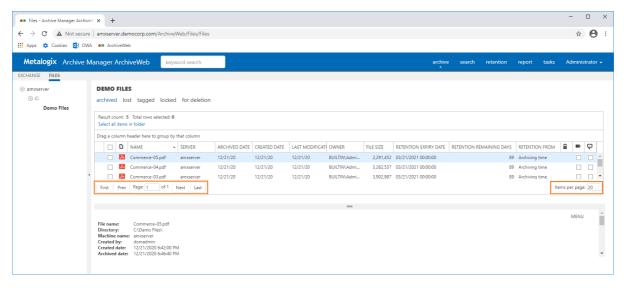
Further, lists can be:

- 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 <u>Profile settings</u> 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".

CHANGE FILES										
amxserver		DEN	IO FI	LES						
 O) C: 										
Demo Files		archi	vea	lost tagged locked for dele	uon					
		Selec	t all ite	: 5 Total rows selected: 0 ms in folder						
		1			*	SERVER	ARCHIVED DATE	CREATED DATE	LAST MODIFICATI	1 (
				Commerce-05.pdf		amxserver	12/21/20	12/21/20	12/21/20	1
	4	Ţ		Commerce-04.pdf		amxserver	12/21/20	12/21/20	12/21/20	E
		- I		Commerce-03.pdf		amxserver	12/21/20	12/21/20	12/21/20	E
		- I		Commerce-02.pdf		amxserver	12/21/20	12/21/20	12/21/20	ł
		ſ		Commerce-01.pdf		amxserver	12/21/20	12/21/20	12/21/20	ł
		First	Pn	Page: 1 of 1 Next Last	t					
		•								
						10110				

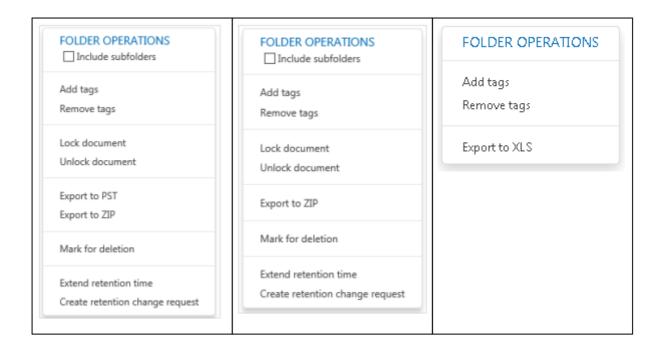
76

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).

Metalogix Archive M	lanager ArchiveWeb keyword search	archive search	retention r	eport tasks	Administrator	
EXCHANGE FILES						
 amxserver C: Demo Files 	DEMO FILES archived lost tagged locked for deletion					
	Result count: 5 Total rows selected: 5 Clear selection					
	Drag a column header here to group by that column					
	D NAME -	SERVER	ARCHIVED DATE	CREATED DATE	LAST MODIFICATI	OW
	Commerce-05.pdf	amxserver	12/21/20	12/21/20		BUII
	Commerce-04.pdf First Prev Page: 1 of 1 Next Last	amxserver	12/21/20	12/21/20	12/21/20	BUII
	•	ш				•
4		FOLDER OPERATIONS				
		Add tags Remove tags				
		Lock document Unlock document				
		Export to ZIP				
		Mark for deletion				
		Extend retention time Create retention change reque	est			

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:

FOLDER OPERATIONS		×						
Do you really want to perform the operation on each item in folder?								
	Yes	No						

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.

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.

Metalogix Archiv	ve N	lanager	keyword search ar	chive	search	report	tasks Adm	inistrator 👻					
EXCHANGE FILES													
(a) aw7 [OFFLINE] (a) C:	î	ATTRIBUTE archived tag	S gged locked for deletion										
TestFiles		Parult count: 7 Total roug calacted: 1											
1000 Attributes			Result count: 7 Total rows selected: 1 Select all items in folder Clear selection										
	2	Drag a column ł	neader here to group by that column										
			NAME	▲ SERVE	R		ARCHIVED ON	CREATED ON					
Huge			2007 Census Maryland.pdf	aw7			01/23/2015 4:	01/23/2015 4:					
Japanese		W	2007_HERMAN-FlapJkulcsErtlap.doc	aw7			01/23/2015 4:	01/23/2015 4:					
Q		Image:	2007_HERMAN-Megyei_segedanyag.doc	aw7			01/23/2015 4:	01/23/2015 4:.					
	4		Auditing database script error log.htm	aw7			01/23/2015 4:	01/23/2015 4:.					
Subdir 00002		First Prev	Page: 1 of 1 Next Last										
_ Subdir_00004		♀ Create Filter											
Subdir_00005		<						>					
Subdir_00006													
Subdir_00007		File name:	2007_HERMAN-Megyei_segedanyag.doc										
Subdir_00008		Directory: Machine name	C:\TestFiles\Attributes\										
Subdir_00009		Created by:	administrator										
Subdir_00010		Created on: Archived on:	1/23/2015 4:30:47 PM 1/23/2015 4:31:14 PM										
Subdir_00011	~	Owner: Size:	BUILTIN\Administrators 29 KB					\sim					

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

 \rightarrow filtered – click the filter link with icon ($^{\circ}$) to create/modify the filter

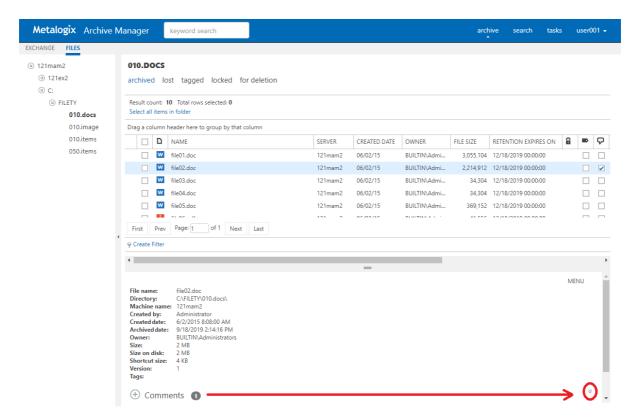
(For more details see the "List view conventions" section.)

The following information are included directly in the list:

- version indicator (③) 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 (a) yellow lock icon if the file is locked
- Tagged status (➡) checked if the file is tagged
- Commented status ($\mathbf{
 abla}$) 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.

<u>Performance hint</u>: 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 <a psychology 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.

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Metalogix Archive					<u>^</u>		
) 121mam2 ④ 121ex2 ④ C: ⑤ FILETY	Result count: 10	tagged locked for Total rows selected: 0	deletion				
010.docs	Select all items in fe						
010.image		ler here to group by that co	lumn			1	
010.items		IME	▲ SERVER	FILE SIZE	RETENTION REMAINING DAYS	OWNER	RETENTION FRO
050.items	🗌 💟 file	01.doc	121mam2	3,055,104	91	BUILTIN\Admi	Archiving time
	🗌 💟 file	02.doc	121mam2	2,214,912	91	BUILTIN\Admi	Archiving time
		03.doc age: 1 of 1 Next	121mam2 Last	34,304	91	BUILTIN\Admi	Archiving time
	↓						
	<						
	Directory: C	ile02.doc :\FILETY\010.docs\				Download	MENU
	Created date: 6	dministrator /2/2015 8:08:00 AM				Restore	
	Owner: B Size: 2	/18/2019 2:14:16 PM UILTIN\Administrators MB MB				Add tags Remove ta	ags
		KB				Lock docu	ment

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).

Metalogix Archive N	Manager	keyword sear	ch				archive	search t	asks	user001 🗸
EXCHANGE FILES										
 3 121mam2 3 121ex2 3 C: 	o10.DOCS		locked f	or deletion				1	.ocke	d item
 FILETY 010.docs 	Select all iten									
010.image 010.items		n header here to g	roup by that						-	
050.items			*	SERVER 121mam2	FILE SIZE 3,055,1	ENTION REMAINING DAYS 91	OWNER BUILTIN\Admi	RETENTION FRC	м	
				121mam2 121mam2	2,214,9 34,3		BUILTIN\Admi BUILTIN\Admi	Archiving time Archiving time	6	

83

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.

Search

8

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 productspecific 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:

- <u>Keyword Search</u>
- Advanced Search
- <u>Search Results</u>
- Search History
- <u>Search Templates</u>

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 <u>Profile</u> 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.

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Metalogix Archive I	Manager ArchiveWeb	keyword search	archive	search	retention	report	tasks	Administrator 🗸
SEARCH HISTORY TEMPLAT	ES							
CRITERIA DOCUMENT TAGS	Search scope: Keyword:	Z EXCHANGE Files						Clear Search

- 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 <u>Search Results</u> 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 <u>Tags</u> 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.

Metalogix Archive M	anager search			archive	search	tasks	user001 🗸
SEARCH HISTORY TEMPLATES	5						
CRITERIA	Marked with all sele	5					
MAILBOXES	Marked with any sel	lected tag					
DOCUMENT TAGS	🔲 📕 personal	🗌 📕 Marketing	🔲 📃 system				

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.

		keyword search	archiv	e search	retention	report	tasks	Administrator 👻
SEARCH HISTORY TEMPLATI	ES							
CRITERIA SERVERS DOCUMENT TAGS	Search scope: Keyword:	🗌 EXCHANGE 🗹 FILES						
	Advanced							
	Include:	 Search in archived and del Search in deleted docume Search in versions. The magnetic search in versions. The magnetic search in versions. 	nts		ersion separate	ły.		
	[= AND/OR + ×	FIELD Archived date File name File name	(• (• (• (= =	VALUE 11/10 Wealt Comn	h		Clear Search

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.

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** X. 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:

Metalogix Archive	Manager ArchiveWeb	keyword search	archive	search	retention	report	tasks	Administrator 🗸
SEARCH HISTORY TEMPLAT	TES							
CRITERIA SERVERS DOCUMENT TAGS	Search scope: Keyword:	EXCHANGE Files						
	Advanced							
	Include:	Search in archived and de Search in deleted document Search in versions. The mean of th	ents		rsion separate	ły.		
	Image: Constraint of the second se	FIELD Archived date File name File name	OP	ERATOR	VALUE	h		Clear Search

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 <u>Profile</u> page is unchecked.

Metalogix Archive	e Ma	anager ArchiveWeb	keywor	d search	archive	search	compliance	retention	report	tasks	Administrator 🚽
SEARCH HISTORY TEMPL	ATES										
CRITERIA		Total rows selected: 1 Clear selection									
SERVERS		Drag a column header here to	group by tha	t column							
DOCUMENT TAGS		SERVER	PORT	PROTOCOL							
	4	amxserver	7777	тср							
											Clear Search

Document tags

The *Document Tags* page displays the tags that you can specify in a search. See <u>Tags</u> 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.

Metalogix Archive N	Manager search			archive	search	tasks	user001 🗸
SEARCH HISTORY TEMPLATE	ES						
CRITERIA MAILBOXES DOCUMENT TAGS	 Marked with all sele Marked with any sel ersonal 	2	system				

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

- <u>Simple conditions</u>
- AND/OR operators
- Grouping
- <u>Keyword search</u>

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

Metalogix Archive N	/lanager ArchiveWeb	keyword search	archive	search	retention	report	tasks	amadmin 👻
SEARCH HISTORY TEMPLAT	ES							
CRITERIA	Search scope:	🗌 EXCHANGE 🗹 FILES						
SERVERS DOCUMENT TAGS	Keyword:							
	Advanced							
	Include:	Search in archived and deleted docume Search in deleted documents Search in versions. The match will be sh		arately.				
	∃ AND/C	JR FIELD	OPERATOR	VALUE				
								Clear Search

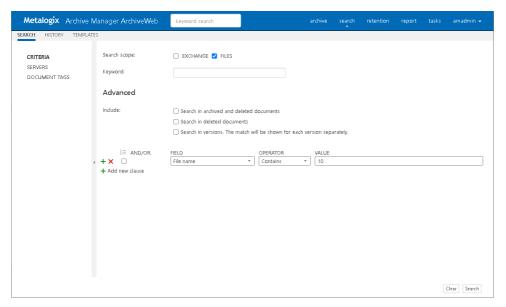
Result

Metalogix Arc	chive Manager ArchiveWeb	keyword search			search r	etention rep			lmin -
EARCH HISTORY T									
LES SEARCH RESU	ILTS								
chived tagged loc	ked								
sult count: 539 Total ro	ws selected: 0								
elect all rows Edit query									
ag a column header here t	o group by that column								
		FOLDER	SERVER	ARCHIVED DATE	OWNER	FILE SIZE	VERSION	a =	۰ ۶
🗄 111.txt		C:\FILETY\ANSI-1252	mam19	09/03/21	BUILTIN\Admi	. 1,02	4	1 [
📕 11542102.pdf		C:\FILETY\010test	mam19	09/06/21	BUILTIN\Admi	. 12,539,95	7	1 🗆] [
🗄 afile.txt		C:\FILETY\zero	mam19	09/03/21	BUILTIN\Admi		D	1 🗆	
👿 bfile.doc		C:\FILETY\zero	mam19	09/03/21	BUILTIN\Admi		D	1 🗆	
Cfile.xls		C:\FILETY\zero	mam19	09/03/21	BUILTIN\Admi		D	1 🗆	
📕 dfile.pdf		C:\FILETY\zero	mam19	09/03/21	BUILTIN\Admi		D	1 🗆	
irst Prev Page: 1	of 27 Next Last							lterns per p	age: 2
								ME	NU
e name: rectory:	111.bit C:\FILETY\ANSI-1252\								
achine name:	mam19 amadmin								
eated by: eated date:	11/19/2020 3:22:00 PM								
chived date:	9/3/2021 3:48:57 PM BUILTIN\Administrators								
e: e on disk:	1 KB 4 KB								
ortcut size:	4 KB								
rsion: tention from:	1 Archiving time								
etention remaining days:									

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

Metalogix Arc	hive Manager ArchiveWeb	keyword search		archive	search re	tention repo	rt tasks	am adn	
	EMPLATES								
LES SEARCH RESU	LTS								
chived tagged loc	ĸed								
esult count: 24 Total rows elect all rows Edit query	selected: 0								
ag a column header here to	group by that column								
D NAME		FOLDER	SERVER	ARCHIVED DATE	OWNER	FILE SIZE	VERSION	₽	Ρ
11542102.pdf		C:\FILETY\010test	mam19	09/06/21	BUILTIN\Admi	12,539,957	1		
🗄 file010.txt		C:\FILETY\100.items	mam19	09/03/21	BUILTIN\Admi	165,799	1		
🗄 file010.txt		C:\FILETY\200.items	mam19	09/03/21	BUILTIN\Admi	18,432	1		
👿 file10.doc		C:\FILETY\020.docs.subfolder\020	mam19	09/03/21	BUILTIN\Admi	22,016	1		
👿 file10.doc		C:\FILETY\050.docs	mam19	09/03/21	BUILTIN\Admi	22,016	1		
📕 file10.pdf		C:\FILETY\010.docs	mam19	09/03/21	BUILTIN\Admi	75,201	1		
rst Prev Page: 1	of 2 Next Last						It	terns per pag	3e: 20
	file010.txt							MENI	U
achine name:	C:\FILETY\200.items\ mam19 amadmin								
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ortcut size:	4 KB								
	Archiving time 88								

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.

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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

Metalogix Archive M	Manager ArchiveWeb	keyword search		archive	search	retention	report	tasks	amadmin 👻
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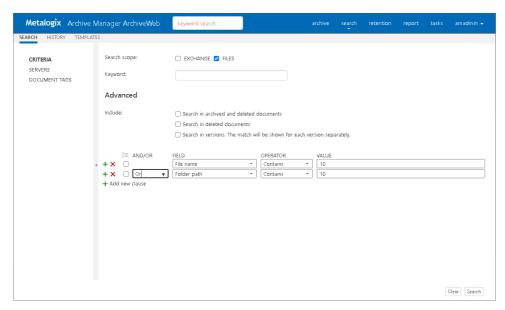
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Example 2

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

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🗄 file001.txt		C:\FILETY\100.items	mam19	09/03/21	BUILTIN\Admi	28,949	1		
🗄 file002.txt		C:\FILETY\100.items	mam19	09/03/21	BUILTIN\Admi	22,555	1		
🗄 file003.txt		C:\FILETY\100.items	mam19	09/03/21	BUILTIN\Admi	22,972	1		
🗄 file004.txt		C:\FILETY\100.items	mam19	09/03/21	BUILTIN\Admi	18,432	1		
file005.txt		C:\FILETY\100.items	mam19	09/03/21	BUILTIN\Admi	7,004	1		
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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:

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

Metalogix Archive M	Manager ArchiveWeb	keyword search	arch	iive search	retention	report	tasks	amadmin 🚽
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		Search in archived and deleted documents Search in deleted documents Search in versions. The match will b FIELD FIE name V Folder path V Size (MB) V		N separately.				
							l	Clear Search

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

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file01.doc		C:\FILETY\010.docs	mam19	09/03/21	BUILTIN\Admi	3,055,104		1		
🗄 file017.txt		C:\FILETY\100.items	mam19	09/03/21	BUILTIN\Admi	1,652,106		1		
🛛 🗄 file018.txt		C:\FILETY\100.items	mam19	09/03/21	BUILTIN\Admi	2,224,943		1		
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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 $\,$

Metalogix Archive M	lanager ArchiveWeb	keyword search		archive	search	retention	report	tasks	amadmin 👻
SEARCH HISTORY TEMPLATE	2								
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	[≡ AND/OR + X □ + X □ + X □ + Add new dause	FIELD File name * Folder path * Size (MB) *	OPERATOR Contains + Contains + > +	VALUE 10 10 1.5					
									Clear Search

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

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🗄 file001.txt		C:\FILETY\100.items	mam19	09/03/21	BUILTIN\Admi	28,949	1		
🗄 file002.txt		C:\FILETY\100.items	mam19	09/03/21	BUILTIN\Admi	22,555	1		
🗄 file003.txt		C:\FILETY\100.items	mam19	09/03/21	BUILTIN\Admi	22,972	1		
🗄 file004.txt		C:\FILETY\100.items	mam19	09/03/21	BUILTIN\Admi	18,432	1		
🗄 file005.txt		C:\FILETY\100.items	mam19	09/03/21	BUILTIN\Admi	7,004	1		
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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"

Metalogix Archive M	Manager ArchiveWeb	keyword search		archive	search	retention	report	tasks	amadmin 🚽
SEARCH HISTORY TEMPLAT	ES								
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	Advanced								
	Include:	 Search in archived and delit Search in deleted documer Search in versions. The mail 	ts	ersion sepa	rately.				
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	+ 🗙 🗆 And	 Archived date 	* <	· 9/4	/2021				
	+ Add new clause								
									Clear Search

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

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🗐 file110.txt		C:\FILETY\200.items	mam19	09/03/21	BUILTIN\Admi	2,224,943	1			
st Prev Page:	1 of 1 Next Last						It	ems pe	page	: 2

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"

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

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🗄 file01.txt		C:\FILETY\050.items	mam19	09/03/21	BUILTIN\Admi	1,652,106	1]
🛛 🗙 file01.xls		C:\FILETY\020.docs.subfolder\020	mam19	09/03/21	BUILTIN\Admi	2,345,472	1			1
🗄 file017.txt		C:\FILETY\100.items	mam19	09/03/21	BUILTIN\Admi	1,652,106	1			1
First Prev Page:	1 of 3 Next Last						lt	erns per pa	ge: 2	0

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")
```

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	AND/OR + X = + X = - + X = - - - - - - - - - -	FIELD File name Archived date Size (MB) Folder path	* > * >	 VALUE 10 9/4/2021 1.5 image 				
							C	lear Search

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

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D NAME FOLDER SERVER ARCHVED DATE OWNER FLE SZE VERSION Image: Comparison of the state o	Select all rows Edit q	uery									
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Image: Second		*	FOLDER	SERVER	ARCHIVED DATE	OWNER	FILE SIZE	VERSION	6	Ð	∇
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Image: First Prev Page: 1 of 1 Next Last Items per page:	🗌 🖾 file10.png		C:\FILETY\010.image	mam19	09/03/21	BUILTIN\Admi	505,663		1		
First Prev Page: 1 of 1 Next Last Items per page:			C:\FILETY\200.items	mam19	09/03/21	BUILTIN\Admi	1,652,106		1		
	file110.txt		C:\FILETY\200.items	mam19	09/03/21	BUILTIN\Admi	2,224,943		1		
1010											
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		t 1 Net Last		8888					lterns p	er page:	20
		ti 1 Net Last		888					lterns p	er page:	: 20
		ti 1 of 1 Next Last		3505					lterns p	er page:	: 20
		t 1 of 1 Nex Last		ни					lterns p	er page:	: 20
		: 1 of 1 Nex Last		888					ltems p	er page:	: 20

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:

RCH HISTORY TEMPL	ATES								
CRITERIA	Search so	ope:	🗆 exchange 🗹	FILES					
SERVERS DOCUMENT TAGS	Keyword:								
	Advand	ed							
	Include:		 Search in archive Search in deleted Search in version 	documents		version sep	arately.		
	(+ × C	AND/OR	FIELD File name		PERATOR Contains	VALUE			
	+ × C		Archived date	•		• 9/4/20	021		
	+× C +× C		Size (MB) Folder path			 ▼ 1.5 ▼ image 			
	+ Add nev	v clause							

Query:	Fil	e Name	conta	ins	"10"	OR	Archived	Date	>	9/4/2021	AND	File	Size	>
1.5MB	OR	Folder	Path	con	tains	"i	mage"							

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

Metalogix An	chive Manager ArchiveWeb	keyword search			search r	etention repo		amadn	
ARCH HISTORY 1									
LES SEARCH RESU	JLTS								
chived tagged lo	cked								
sult count: 33 Total row	vs selected: 0								
lect all rows Edit query									
ag a column header here f	to group by that column								
D NAME	*	FOLDER	SERVER	ARCHIVED DATE	OWNER	FILE SIZE	VERSION	8 P	5
11542102.pdf		C:\FILETY\010test	mam19	09/06/21	BUILTIN\Admi	12,539,957	1		E
🖾 file01.jpg		C:\FILETY\010.image	mam19	09/03/21	BUILTIN\Admi	33,649	1		E
🗄 file010.txt		C:\FILETY\100.items	mam19	09/03/21	BUILTIN\Admi	165,799	1		[
🗄 file010.txt		C:\FILETY\200.items	mam19	09/03/21	BUILTIN\Admi	18,432	1		E
🛃 file02.jpg		C:\FILETY\010.image	mam19	09/03/21	BUILTIN\Admi	142,445	1		E
🖾 file03.jpg		C:\FILETY\010.image	mam19	09/03/21	BUILTIN\Admi	32,051	1		E
rst Prev Page: 1	of 2 Next Last						Ite	ms per pag	ge: 2
								MENI	U
name:	file01.jpg								
rectory: achine name:	C:\FILETY\010.image\ mam19								
eated by: eated date:	amadmin 11/19/2020 3:21:00 PM								
chived date:	9/3/2021 3:44:56 PM								
vner:	BUILTIN\Administrators 33 KB								
e on disk:	36 KB								
ortcut size: rsion:	4 KB								
tention from:	Archiving time								
tention remaining days:	88								

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

Metalogix Archive	Manager ArchiveWeb	keyword search		archive	search	retention	report	tasks	amadmin 👻
SEARCH HISTORY TEMPLAT	TES								
CRITERIA SERVERS	Search scope: Keyword:	EXCHANGE Z FILES outside							
DOCUMENT TAGS	Advanced	out at							
	Include:	Search in archived and deleted Search in deleted documents Search in versions. The match v		ersion sepa	arately.				
	E AND/OR + X D + Add new dause	FIELD ¥	OPERATOR Contains •	VALUE					
									Clear Search

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

Met	alogix	Archive Manager ArchiveWeb	keyword search			search re	etention rep	port tasi		admin •	
SEARCH	HISTORY	TEMPLATES									
	tagged										
Result cou	nt: 2 Total	rows selected: 0									
Select all r	ows Editiqu	ery									
Drag a colu	mn header h	ere to group by that column									
	NAME		FOLDER	SERVER	ARCHIVED DATE	OWNER	FILE SIZE	VERSION	8	• 5	1
	11542102.p	If	C:\FILETY\010test	mam19	09/06/21	BUILTIN\Admi	12,539,9	57	1		1
	file107.txt		C:\FILETY\200.items	mam19	09/03/21	BUILTIN\Admi	7,2	40	1		
First F	rev Page:	1 of 1 Next Last							ltems per	r page: 2	D
		error=target[x][y]- } else									1
		error=255; if (error <min) min=error; difference[x][y]=error;</min) 	//for pi	xels <mark>outside</mark> bound	daries						
		if (error!=0)		llucal to comuta	cimilanity of	-				•	- 1
(+) Cor	nments	•								\approx	- 1
G Cor	ninents										

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.

	Met	alogix	Archive Manager Ar	chiveWeb keywo	rd search	archive	search retention	n report	tasks	Administrato	or 👻
SE/	ARCH	HISTORY	TEMPLATES								
EX	CHAN	GE SEARCH F	RESULTS FILES SEARCH RE	SULTS							
FIL	ES SI	EARCH R	ESULTS								
arcł	nived	tagged	locked								
		unt: 5 Total items in folde	rows selected: 0 er Edit query								
Drag	j a coli	umn header l	here to group by that column								
#	D	NAME	*	FOLDER	SERVER	ARCHIVED DATE	OWNER	FILE SIZE	VERSION	ê ₽	P
	人	Commerce-	05.pdf	C:\Demo Files	amxserver	12/21/20	BUILTIN\Administrators	2,291,452	1		
	入	Commerce-	04.pdf	C:\Demo Files	amxserver	12/21/20	BUILTIN\Administrators	3,262,537	1		
	\mathbf{x}	Commerce-	03.pdf	C:\Demo Files	amxserver	12/21/20	BUILTIN\Administrators	3,902,987	1		
Fir	st	Prev Page	1 of 1 Next Last								
					1111111						
Dire Arc	name ectory hived ner:	: C:\D date: 12/2	merce-05.pdf emo Files\ 1/2020 6:46:40 PM TIN\Administrators							MENU	Â

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.

Me	talogix Archive Manage	r ArchiveWeb	keyword search	archive	search retention	n report	tasks	Administrato)r ▼
SEARCH	HISTORY TEMPLATES								
FILES S	EARCH RESULTS								
archived	d tagged locked								
	unt: 5 Total rows selected: 0 items in folder Edit query								
	lumn header here to group by that colu							0 -	
# D	NAME	▲ FOLDER	SERVER	ARCHIVED DATE	OWNER	FILE SIZE	VERSION	<u> </u>	9
	Commerce-05.pdf	C:\Demo Files	amxserver	12/21/20	BUILTIN\Administrators	2,291,452	1		
□ 人	Commerce-04.pdf	C:\Demo Files	amxserver	12/21/20	BUILTIN\Administrators	3,262,537	1		
— 人	Commerce-03.pdf	C:\Demo Files	amxserver	12/21/20	BUILTIN\Administrators	3,902,987	1		
First	Prev Page: 1 of 1 Next	Last							
				I					
File nam Directory Machine								MENU	

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:

- <u>Viewing the search result summary</u>
- <u>Viewing the search query</u>
- <u>Viewing the search results</u>
- Editing the search query

- Saving the search query
- Extending search history
- <u>Cleaning up search history</u>

Viewing the search result summary

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

etalogix Archiv	e Manager ArchiveWeb	keyword sear	rch	archive	search	retention	report	tasks	Administrate
CH HISTORY TEMP	ATES								
									Ô
	EARCH RESULTS - 12/23/2020 6:15 A Search results summary &	:50 PM							×
Include eaus	Coarch in archived documents								
Mailboxes e Mohan [AM Pablo Nerue SQL query e Contains 'W	Is Search in archived documents Juals Administrator (AMXSERVEF) SSERVER], Juan Christie (AMXSE la (AMXSERVER), public AMXEX quals [To] = 'davidwebb@democ ealth') imber of search results equals 10,0	R], Aman Ali [AM] RVER], Karl Jorda CH [AMXSERVER] orp.com' AND [So	n [AMXSERVER], Tim Ashford	R], Niki Portma [AMXSERVER]	n [AMXSER	/ER], Nina Tan	aka [AMXS	ERVER],	
Mailboxes e Mohan [AM Pablo Nerue SQL query e Contains 'W	auals Administrator [AMXSERVEF XSERVER], Juan Christie [AMXSE la [AMXSERVER], public_AMXEX quals [To] = 'davidwebb@democ ealth') Imber of search results equals 10,0	R], Aman Ali [AM] RVER], Karl Jorda CH [AMXSERVER] orp.com' AND [So	n [AMXSERVER], Tim Ashford	R], Niki Portma [AMXSERVER]	n [AMXSER	/ER], Nina Tan	aka [AMXS	ERVER],	•
Mailboxes e Mohan (AM Pablo Neruu SQL query e Contains 'W Maximum nu Result count: 8 EXCHANGE - 5	auals Administrator [AMXSERVEF XSERVER], Juan Christie [AMXSE la [AMXSERVER], public_AMXEX quals [To] = 'davidwebb@democ ealth') Imber of search results equals 10,0	R], Aman Ali [AM] RVER], Karl Jorda CH [AMXSERVER] orp.com' AND [So 000	n [AMXSERVER], Tim Ashford	R], Niki Portma [AMXSERVER]	n [AMXSER	/ER], Nina Tan	aka [AMXS	ERVER], [Subject]	I ®
Mailboxes e Mohan (AM Pablo Neruu SQL query e Contains 'W Maximum nu Result count: 8 EXCHANGE - 5	quals Administrator [AMXSERVEF XSERVER], Juan Christie [AMXSE a [AMXSERVER], public, AMXEX quals [To] = 'davidwebb@democ ealth') imber of search results equals 10,0 EARCH RESULTS - 12/23/2020 4:54	 Aman Ali [AM] RVERJ, Karl Jorda CH (AMXSERVER) orp.com' AND [So 000 :38 PM SID: 	n [AMXSERVEF , Tim Ashford ent Date] > '20	R], Niki Portma (AMXSERVER))19-01-01' AND 96543122-2249	n [AMXSER' ([Subject]	VER], Nina Tan Contains 'Com	aka [AMXS	ERVER], [Subject]	

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 \approx to hide the **Search result summary** section.

Viewing the search query

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

ISTORY TEMPLAT	TES						
							ť
	ARCH RESULTS - 12/23/2020 6:15 Search results summary 🛛	:50 PM					>
Mohan [AMXS Pablo Neruda SQL query equ	Search in archived documents als Administrator [AMXSERVER] SERVER], Juan Christie [AMXSE [AMXSERVER], public_AMXEX als [To] = 'davidwebb@democ	RVER], Karl Jorda CH [AMXSERVER]	an [AMXSERVER], Niki Port], Tim Ashford [AMXSERVE	man [AMXSER R]	VER], Nina Tan	aka [AMXS	ERVER],
Mohan [AMXS Pablo Neruda SQL query equ Contains 'Wea	als Administrator [AMXSERVEF SERVER], Juan Christie [AMXSE [AMXSERVER], public_AMXEX (als [To] = 'davidwebb@democ	RVER], Karl Jorda CH [AMXSERVER] orp.com' AND [S	an [AMXSERVER], Niki Port], Tim Ashford [AMXSERVE	man [AMXSER R]	VER], Nina Tan	aka [AMXS	ERVER],
Mohan (AMXS Pablo Neruda SQL query equ Contains 'Wea Maximum num Result count: 8 EXCHANGE - SEA	als Administrator [AMXSERVEF SERVER], Juan Christie [AMXSE [AMXSERVER], public_AMXEX (hals [To] = 'davidwebb@democ alth')	RVER), Karl Jorda CH (AMXSERVER orp.com' AND (S	an [AMXSERVER], Niki Port], Tim Ashford [AMXSERVE	man [AMXSER R]	VER], Nina Tan	aka [AMXS	ERVER], [Subject]
Mohan (AMXS Pablo Neruda SQL query equ Contains 'Wea Maximum num Result count: 8 EXCHANGE - SEA	als Administrator [AMXSERVER] SERVER], Juan Christie [AMXSE [AMXSERVER], public_AMXEX (To] = 'davidwebb@democ alth') hber of search results equals 10,0 ARCH RESULTS - 12/23/2020 4:54	RVER), Karl Jorda CH (AMXSERVER orp.com' AND (S	an [AMXSERVER], Niki Port], Tim Ashford [AMXSERVE	man [AMXŠER R] ND ([Subject]	VER], Nina Tar	aka [AMXS	ERVER], [Subject] 2 🗳 🗳 🤇

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 \approx 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 **l** to save the search query. The *Save Search As* dialog opens.

SAVE SEARCH AS	×
Search template name: Emails to David Webb	
Cancel Save	

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

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

```
•
<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:

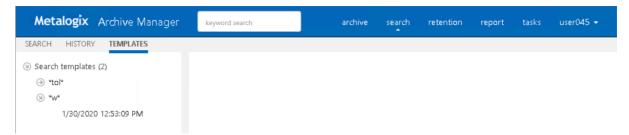
- 1. Open the C:\Program Files\Metalogix\MAMSearch\PamSearch.exe.config file.
- 2. Add a new section name (if it does not exist) under the <configSections> node

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

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.

letalogix Archive I ch history templat	the second s									archive	search	retention	report	tasks	
earch templates (2)	FILES SEARCH RESU	ULTS													
Exchange ("tol") Files ("w")	archived tagged lo														
1/30/2020 12:53:09 F	F Result count: 7 Total rows selected: 0 Select all rows														
	Drag a column header here	to group by that column													
			▲ FOLDER	SERVER	ARCHIVED DATE	OWNER	FILE SIZE	VERSION	â	∎ Ç					
	Student Leaders	ship 0910.xlsx	C:\MailboxFiller\JX-files	85mam1	01/30/20	BUILTIN\Admi	39,971								
	🗌 💹 towntopicsbio2	1809.docx	C:\MailboxFiller\JX-files	85mam1	01/30/20	BUILTIN\Admi	124,339								
	tpc2009.pptx		C:\MailboxFiller\JX-files	85mam1	01/30/20	BUILTIN\Admi	498,539								
	🔲 💹 watchmatic 060	19. docx	C:\MailboxFiller\! X-files	85mam1	01/30/20	BUILTIN\Admi	17,878								
	First Prev Page: 1	of 1 Next Last												lten	ns per pa
															MEN
	File name: Directory:	tpc2009.pptx C:\MailboxFiller\! X-files\											Downloa	d	
	Machine name: Created by: Created date:	85mam1 administrator 7/8/2019 1:11:13 PM											Restore		
	Archived date: Owner:	1/30/2020 12:40:38 PM BUILTIN\Administrators											Add tags		
	Size: Size on disk:	487 KB 488 KB											Remove	tags	
	Shortcut size: Version: Retention from:	4 KB 1 Archiving time											Lock doc	ument	
	Retention remaining days: Retention expiry date:												Mark for	deletion	
	Tags:													tention time tention chan	

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

Metalogix Archive Mana	Metalogix Archive Manager Arch	iveWeb keyword search	archive	search	retention	report	tasks	Administrator 🗸
SEARCH HISTORY TEMPLATES	SEARCH HISTORY TEMPLATES							
 Search templates (2) Emails from Tim 8/9/2021 11:11:30 PM Medical Files 8/10/2021 10:59:53 PM 	CRITERIA Search scope: SERVERS Keyword: DOCUMENT TAGS Advanced							
0,10,202110000001111	Advanced							
	Include:	Search in archived and of	deleted documents					
	4	Search in deleted docum	nents					
		Search in versions. The r	match will be show	n for each ve	ersion separate	ly.		
	[≡ A + × □ + Add new cla	ND/OR FIELD File name	OPERAT		VALUE Medical			
	Search template name: Medical Files Created by: DEMOCORPI.domadmin Created on: 8/10/2021 11:00:15 PM							Delete Search

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:

- o Exchange Archive
- o 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.

Metalogix Archive N	/lanager	keyword	search			archive	search	retention	report	tasks	Administrator 🗸
STATISTICS AUDIT	_										
 Exchange Archive Archive size 	Range: 9/	/3/2018	r - 9/18/2019	Ŧ							Generate
Archived messages											
Files Archive											Export
Archived	Drag a colum	n header here	to group by tha	t column							
Archived Versions	YEAR	MONTH	DAY	HOUR	COUNT						
Restored	2019	7	13	9			3				
Retention	2019			10			35				
	2019	5	22	9			20				
4	(
	9 Create Filte	er									

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.

Metalogix Archive	Manager	keyword	search			archive	search	retention	report	tasks	Administrator -
AUDIT											
) Exchange Archive Archive size	Range: 9/	3/2018	▼ - 9/18/2019	-							Generate
Archived messages											_
Files Archive											Expo
	Drag a colum	n header here	to group by the	at column							Export to CSV
	YEAR	MONTH	DAY	HOUR	COUNT						Export to PDF Export to RTF
	2019	-	7 13	9			3				Export to XLSX
	2019		5 22				35				Export to ALES
	2019		5 22	9			20				
	4										
	9 Create Filte										

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.

Metalogix Archive N	Aanager k	eyword search		archive	search	retention repor	t tasks	Administrator	
TATISTICS AUDIT									
) Archive Manager for Files) ArchiveWeb	Result count: 1 T Select all items in t	Total rows selected: 0 folder							
③ Archive Manager for Excl	Drag a column hea	der here to group by that col	lumn						
Eegal hold	LOG LEVEL	LOG DATE	 METHOD 	COMP	UTER	USER		CATEGORY	1
Search	🔲 🖲 Info	07/13/19	ArchiveWeb.Search	121ma	m2 [10.16.1	121DEMO2\user002		Archive Manager f	
⊖ Security									
	First Prev	Page: 1 of 1 Nevt	Last					Items per page:	20
	First Prev Filter	Page: 1 of 1 Next	Last					ltems per page:	20
		Page: 1 of 1 Next	Last	10000				Items per page:	20
		Page: 1 of 1 Next	Last	UNIN				Items per page:	20
		ArchiveWeb		10000			Add		20
	♀ Create Filter ♦ Product: Category: Log level:	ArchiveWeb Archive Manager Info	for Exchange.Search	JIIIIII				MENU	20
	♀ Create Filter ♦ Product: Category: Log level: Log date: Method:	ArchiveWeb Archive Manager Info 7/13/2019 9:27:33 ArchiveWeb.Searc	for Exchange.Search 9 AM ch	JIBIB			Ren	MENU i tags	20
	♀ Create Filter ♦ Product: Category: Log level: Log date:	ArchiveWeb Archive Manager Info 7/13/2019 9:27:33	for Exchange.Search 9 AM ch 121.13]	HINK			Ren	MENU d tags nove tags	20

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)

Metalogix Archive Ma	anager keyword	l search	archive	search
OLES PERMISSIONS PROFILE	SHARED MAILBOXES	TAGS MANAGE	MENT	
	Search		Delete saved res	ult
Global	Search		Export to mailbo	×
	Search		Export to PST	
	Search		Export to ZIP	
	Search		Save search resu	ltito database
	Search		Search files	/
· · ·	GROUP OR USER NAMI		ALLOW D	ENY
	default			
	121demo2.local\Administra	tor		×
	121demo2.local\user001		v	×
Metalogix Archive Ma	anager keyword	l search	archive	search task
CHANGE FILES HISTORY	TEMPLATES			
FILES - SEARCH RESULTS				
Search query 😵 Search I Result count: 24	results summary 🛛 🖇			

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.

- i **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.

Metalogix Archive	Manager key	word search	ar	chive search	retention repor	t tasks Administrat	or 🚽
STATISTICS AUDIT							
Archive Manager for Files Archive	Result count: 12 To Select all items in fol						
Archive	Drag a column heade	er here to group by that co	olumn				
Retrieve	LOG LEVEL	LOG DATE	✓ METHOD	COMPUTER	USER	CATEGORY	1
Statistics	🔲 🏮 Info	09/18/19	FilePam.CoreServices.F	121MAM2	Administrator	Archive.Archive	
ArchiveWeb	🔲 🏮 Info	09/18/19	FilePam.CoreServices.F	121MAM2	Administrator	Archive.Archive	
Email Archive	🔲 🏮 Info	09/18/19	FilePam.CoreServices.F	121MAM2	Administrator	Archive.Archive	
	- n 1	00/10/10		101848840	A	A	
		ge: 1 of 1 Next	Last			ltems per	page:
	9 Create Filter						
	4						
						MENU	J
	Product:	Archive Manage	r for Files			Add tags	
	Category: Log level:	Archive.Archive				Remove tags	
	Log date:	9/18/2019 2:14:1				Download log entry	
	Method: Computer:	FilePam.CoreSen 121MAM2	vices.FilePamCore.SimplyAr	chiveFile		bownload log entry	
	User:	Administrator					
	Message: Tags:	Archived success	stully				
	Details:						

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

Metalogix Archive N	lanager	keyword search		ar	chive	search	retention	report	tasks	Administrator	
STATISTICS AUDIT											
 Archive Manager Files Edition Archive Manager for Files 		Total rows selected: 2 n folder Clear selection									
(3) Archive	Drag a column h	ader here to group by th	at colur	nn							
Archive	LOG LEVEL	LOG DATE	-	METHOD	COMPUTE	R	USER			CATEGORY	
Retrieve	Info	09/18/19		FilePam.CoreServices.F	121MAM2		Administrator			Archive.Archive	C
Statistics	🗸 🏮 Info	09/18/19		FilePam.CoreServices.F	121MAM2		Administrator			Archive.Archive	
 ArchiveWeb Email Archive 	🗌 🛈 mía	09/18/19		FilePam.CoreServices.F	121MAM2		Administrator			Archive.Archive	
Email Archive	- A 1.22	00/18/10			101846840		A			A	
	First Prev	Page: 1 of 1 Ne	xt L	ast						ltems per pa	ige: 2
	9 Create Filter										
	•										
4				K							
				Add ta	igs						
				Remov	ve tags						
				Export	to XLS						

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

Tasks

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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.

ASKS						2
STATUS		TASK				
JINI US	START	FINISH	TOTAL COUNT	PROGRESS		1
Running	[EXCHANGE] - EXPORT TO 5/15/2018 2:17:45 PM	ZIP	1,172	107	×	
Completed	[FILES] - REMOVE TAG 5/4/2018 2:46:11 PM	5/4/2018 2:46:13 PM	9,992		×	
Completed	[EXCHANGE] - REMOVE TA 5/4/2018 12:37:55 PM	AG 5/4/2018 12:37:56 PM	10,000		×	
Failed	[EXCHANGE] - ADD TAG 5/4/2018 12:37:19 PM	5/4/2018 12:37:19 PM	10,000	Error log	×	
Completed	[EXCHANGE] - EXPORT TO 4/30/2018 8:28:16 AM	ZIP 4/30/2018 8:28:17 AM	1	Download	×	ļ
Completed	[FILES] - EXPORT TO ZIP 4/26/2018 2:41:22 PM	4/26/2018 2:41:26 PM	20	Download	×	
Completed	[EXCHANGE] - EXPORT TO 4/25/2018 10:55:29 PM	ZIP 4/25/2018 10:55:30 PM	1	Download	×	
Completed	[EXCHANGE] - ZIP'E AKTAR 4/24/2018 1:13:18 PM	4/24/2018 1:13:57 PM	392	Download	×	
~	[EXCHANGE] - EXPORT TO	ZIP		Re	fresh	

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

Tasks

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.

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.

🖣 Internet Information Services (II	S) Manager			
	plication Pools			🔛 🖂 🚹 I 🕑 🗸
File View Help	A	dvanced Settings	?	×
	Pilcation Pools	General NET Framework Version Enable 32-Bit Applications Managed Pipeline Mode Name Queue Length Start Automatically CPU Limit Limit Action Limit Interval (minutes) Processor Affinity Enabled Processor Affinity Mask Process Model Identity Idle Time-out (minutes) Load User Profile Maximum Worker Processes Ping Enabled Ping Maximum Response Time (seconds) StartAumatic (seconds) Start nume Limit (seconds)	v4.0 False Integrated AWApPPool7 4000 True 0 NoAction 0 False 4294967295 40demo1\Administrator 0 False 1 1 True	x - 0 1 0 -
		Idle Time-out (minutes)	a worker process will remain idle before it	
٩	Features Vie	w Content View	OK Cancel	

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

≌ Internet Information Services (II	S) Manager	
	es → Default Web Site → ArchiveWeb7 →	🖸 🛛 🖓 I 🕐 🕶
File View Help		
Connections	Session State Mode Settings Not enabled In process Custom State Server Connection string: [rcpip=loopbadc:424244 Time-out (in seconds): 10 Connection string: [data source=localhost;1ntegrated Security=SSPI V Create Time-out (in seconds): 10 Enable custom database Cookie Settings Mode: Use Cookies Ime-out (in minutes): Ime-out (in minutes): Ime-out (in minutes):	Actions Apply Cancel Help Online Help Online Help
Saniga Statin School Web Shephich Ven	cor neercomy	1L::

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

About Us

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

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Technical Support Resources

Technical support is available to Quest customers with a valid maintenance contract and custome rs 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