



Metalogix Software

Install Guide for

Archive Manager Files Edition

version 5.1

Installation Package

for Microsoft Windows 2000/XP/2003/2008

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Table of Contents

Introduction	3
What is Archive Manager Files Edition	3
Process of archiving with Archive Manager using HSM store	3
Supported software environments (file servers)	4
Technical requirements	4
Database.....	4
Installation	6
<i>Express installation</i>	7
<i>Advanced installation</i>	14
Post Installation Tasks	24
Planning and Tools tab	28

Introduction

The **Archive Manager Files Edition installation package** makes the Archive Manager Files Edition installation process very transparent and intuitive. This manual leads you through the dialogs of the installation wizard and describes the step-by-step installation of Archive Manager.

What is Archive Manager Files Edition

Archive Manager Files Edition is a software solution for archiving files transparently while preserving the existing structure of disks, folders and files. It provides full version management with the ability to retrieve any of the versions. Archived files are replaced on a file server with a shortcut, which takes up much less space, yet they are available for end users who can work with them as usual. Moreover, our full-text search engine searches through the archives by applying various search criteria.

With **Archive Manager** you increase the capacity of fast and expensive storage media by using cheaper slower devices without increasing access time to often used files. The administrator can define which of the files are considered as frequently used (fast access to them is crucial) and infrequently used (fast access to them is not crucial) by specifying a time interval from the time of their last usage. When that interval elapses, the file is automatically replaced with a shortcut during archiving. Administrators can define more such time spans and group files included in categories, assigning each category a different time span.

The system is fully automated and the administrator needs to specify only the attributes of its behavior. It enables centralized search through company data which is faster and more efficient than searching through different machines/systems.

Archive Manager includes a data storage system, i.e. a Hierarchical Storage Management system (HSM) which was developed by Metalogix Software. It allows storing of data (even all company data) on one or more file-servers. A shared store can also be used. HSM ensures that files with identical content are stored only once regardless of where their respective original file (the Single Instance Store Service) is located.

Process of archiving with Archive Manager using HSM store

Archive Manager Files Edition transfers the desired file to the HSM system which stores and retrieves files. The HSM system works with a database because the information contained in the shortcut is stored in MS SQL. The HSM system passes down this file to a store specified by the administrator, which allows the file to be compresses “on the fly”. A shortcut of only a few kilobytes remains at the file’s original location. This shortcut bears the same name and the same file extension as the original file (in the case of FSA [standard] shortcuts) and includes information about the new location of the archived file. The only difference a user notices is that the

shortcut is displayed with a slightly modified icon and the name of the file is written in blue (in Explorer view). FSA shortcuts have also the Archive, Compressed and Offline flags set.

Users may work with archived files as usual which means: when an archived file is reopened, **Archive Manager** passes the information from the shortcut onto the HSM system and the file is automatically restored from the store. For users it seems as if they are working in a normal environment.

The HSM system developed by Metalogix Software includes the Single Instance Store service (SIS), which enables versioning in cooperation with Archive Manager. Due to versioning the HSM system keeps track of any changes made to a document, e.g.:

- **who** modified the document;
- **when** this modification occurred;
- **what** was modified within the document.

With versioning enabled, the administrator may retrieve older versions. Even files whose shortcuts were deleted from the file server can be retrieved as well.

The Single Instance Store service also ensures that files from different locations that have identical content are stored in HSM just once. This feature saves significant space when storing documents.

Supported software environments (file servers)

Archive Manager Files edition is supported on:

- Windows 2003/2008, 64-bit version
NOTE: If the product is installed on Windows 2008, 64-bit version, make sure that Microsoft .NET 3.5 SP1 is installed. Then also check the "Static Content" check box under Server Manager -> Server Roles-> Web Server (IIS) -> Role Services
- Windows 2000/2003/2008, 32-bit versions
- Windows XP, 32-bit versions
- Windows Storage Server 2003, 32- and 64-bit versions
- Macintosh clients when CIFS/SMB protocol is used (standard Windows shares); AFP protocol (e.g. ExtremeZ-IP software) is also supported
- NTFS and PolyServe FileSystem (PSFS) – also mount-point support

Technical requirements

To run the installation you must have **.NET Framework 2.0 SP2** or higher installed on the machine. This prerequisite is also checked by the installation package.

It is possible to install Archive Manager Files Edition on servers without **IIS**. However, this **DISABLES** the creation of HTML shortcuts and EMC Celerra archiving. It is also **NOT** possible to use MS Search as the full-text search engine.

Database

Archive Manager Files Edition works with MS SQL 2005 / 2008 database. The setup can install the database or you can use an existing database.

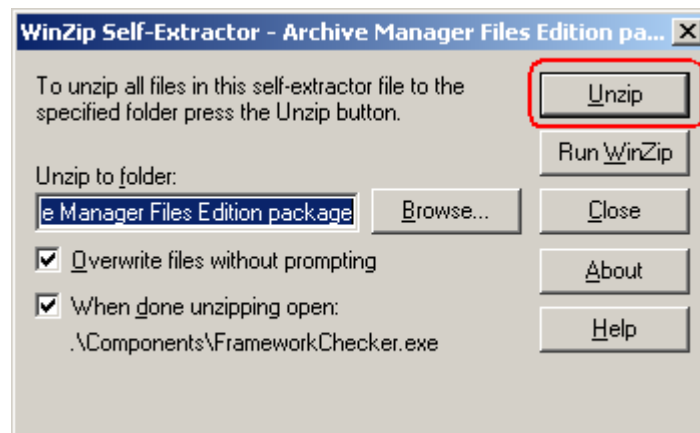
We recommend installing the latest version of MDAC (Microsoft Data Access Components). The installation wizard notifies the user if the latest MDAC (version 2.8) is not present.

Installation

To run the Archive Manager Files Edition setup, .NET Framework 2.0 SP2 or higher has to be installed on the machine and the logged on user has to be a local admin.

1. Run the Archive Manager self-extracting package. As the default it unzips to **C:\Metalogix \Archive Manager Files Edition package** but you can use the **Browse** button to change the directory. Click **Unzip**.

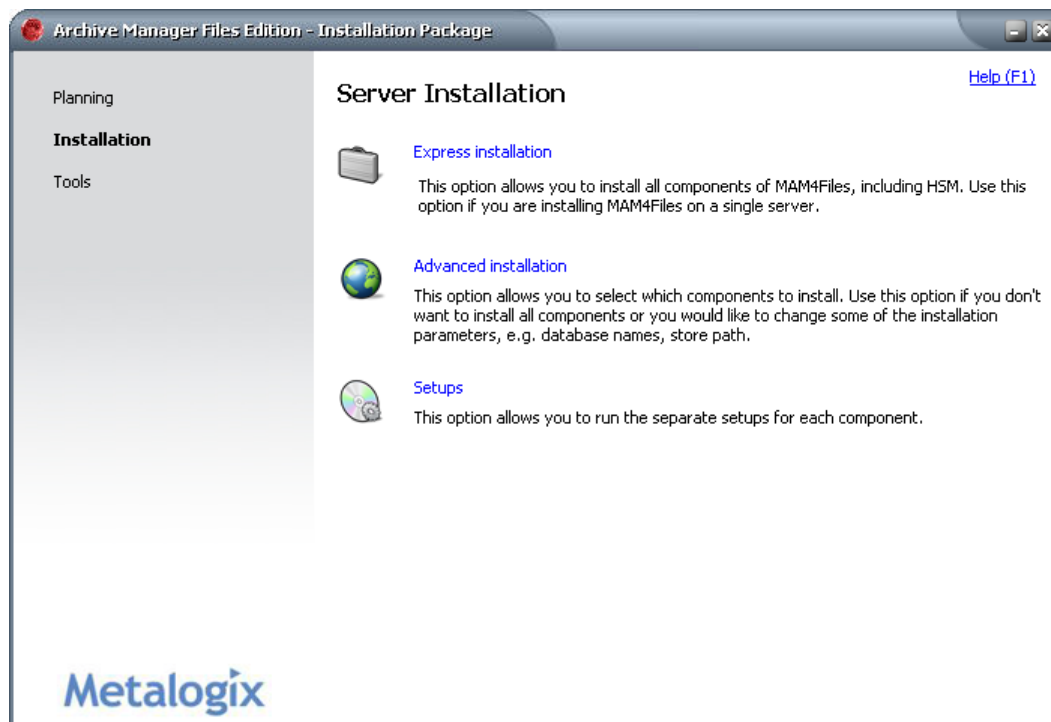
NOTE: It is a good practice to always unzip to the same directory.



2. When files unzip, click **OK**.
3. The wizard opens as default on the **Installation** tab where you can choose between two types of installation:
 - **Express installation** – installs all components on a single server
 - **Advanced installation** – allows you to select which components you want to install. You can also use this option to change some of the installation parameters

First we detail all steps of the *Express installation*. The second section of the manual deals with *Advanced installation*.

NOTE: Under the **Setups** option you can find separate setups for Archive Manager Files Edition components. These setups can be deployed in specific cases when you want to install components of Archive Manager on separate machines.

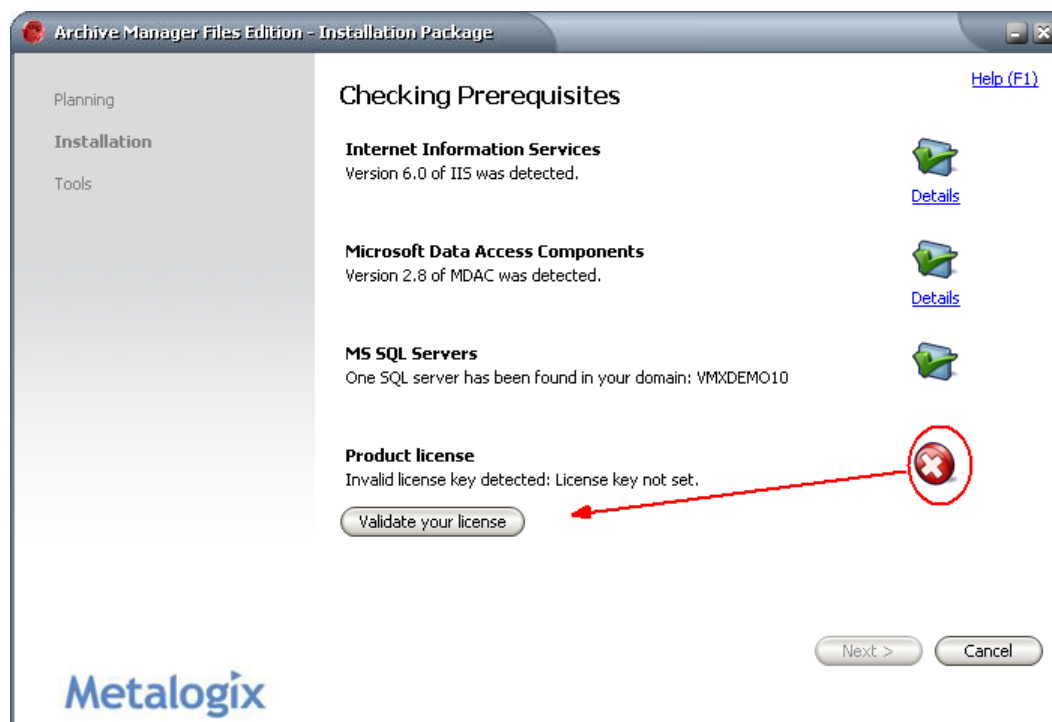


Express installation

To install Archive Manager Files Edition with all its components on a single server:

4. Click **Express installation**. Firstly, the wizard checks prerequisites:
 - IIS (necessary if you want to use HTML shortcuts, Celerra archiving or MS Search)
 - MDAC and
 - available MS SQL servers
 - License

IIS and MDAC are recommended to be installed. MS SQL database can be installed by the setup itself.

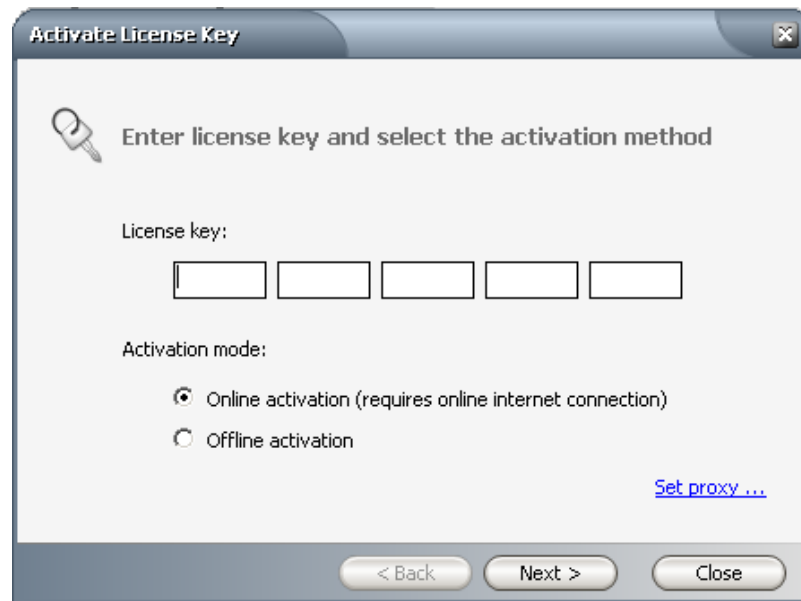


Before proceeding with installation, you need to apply the license. To do so, click **Validate your license** button. There can be two different situations:

- Archive Manager server has an internet connection (a)
- Archive Manager server has NO internet connection (b)

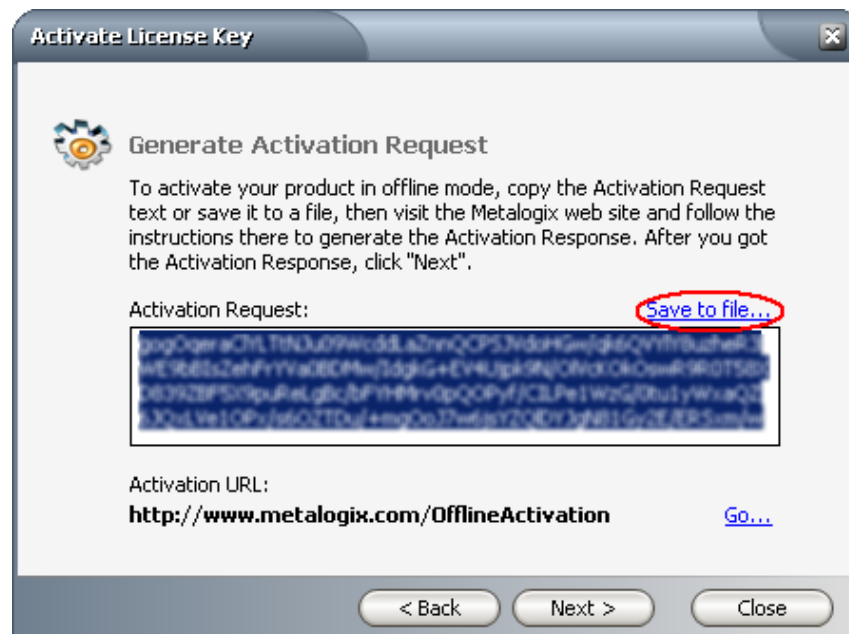
a) If the server has an internet connection, follow the next steps:

- Enter your license key and click **Next**.
NOTE: If the internet access is filtered out by proxy on the Archive Manager server, click the **Set proxy** link to enter the respective parameters.
- License will be validated and you can continue the installation.



b) If the server has NO internet connection, follow the next steps:

- Enter your license key.
- Select the **Offline activation** radio button and click **Next**.
- Copy the *Activation request* text from the **Activation request** text box or save it as a file (click the Save to file link)



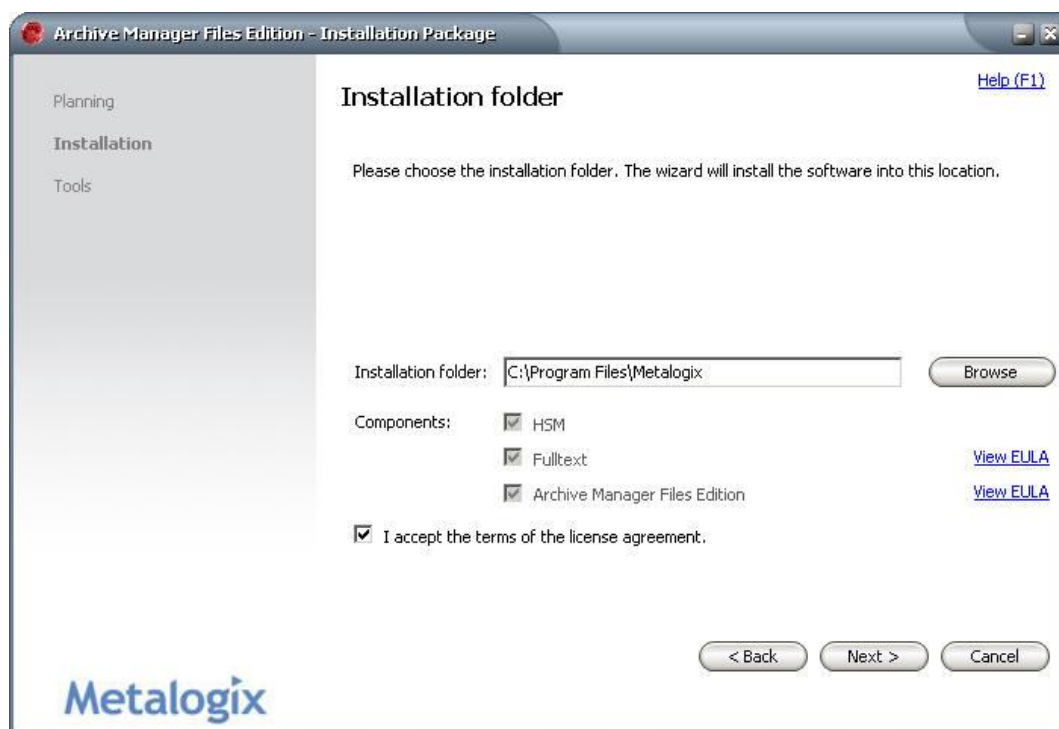
- On the machine with internet access open the Metalogix Activation URL: <http://www.metalogix.com/OfflineActivation>
- Paste the *Activation Request* text you have copied or **Browse** for the file you have saved and click **Activate**
- *Activation text* is generated. Again copy the text or save it as a file

- Back on the Archive Manager server click **Next** to proceed to the **Enter your Activation Response** dialog. Paste the *Activation text* you have copied from the Metalogix web page or load the file.
- Click **Next**, then **Finish**.

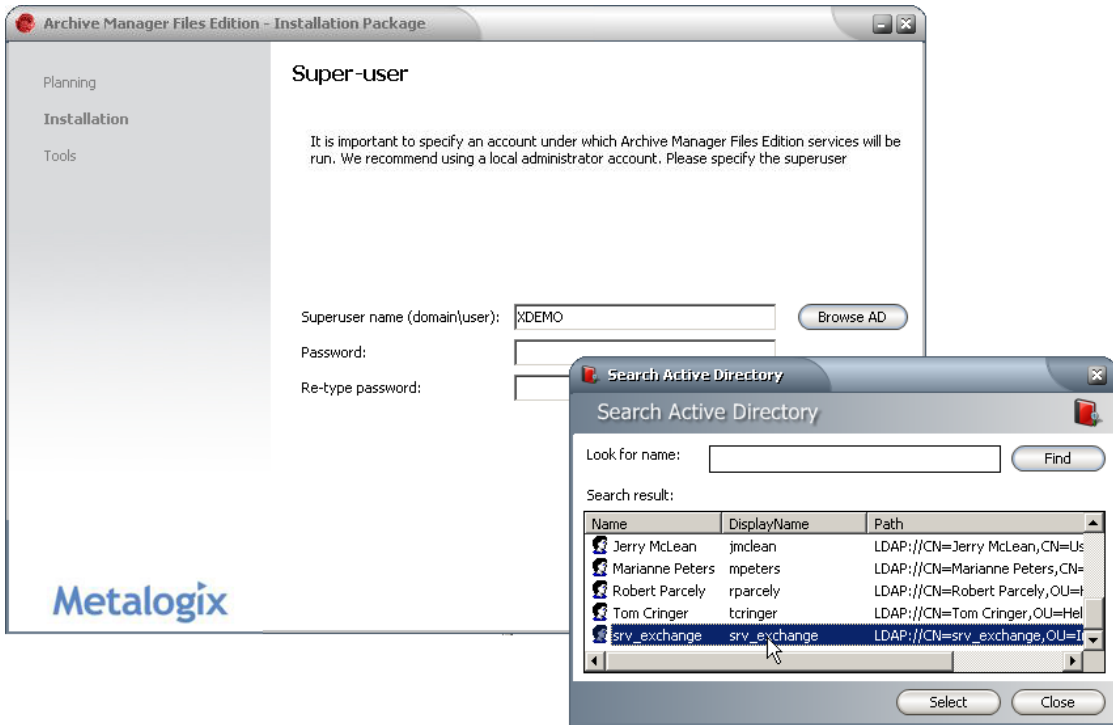
NOTE: In case your Archive Manager server has no Internet connection permanently, you will be asked to revalidate your license periodically. It is the same process as described in the part b) above.

When you have successfully applied the license, click **Next** in the install wizard to continue the installation.

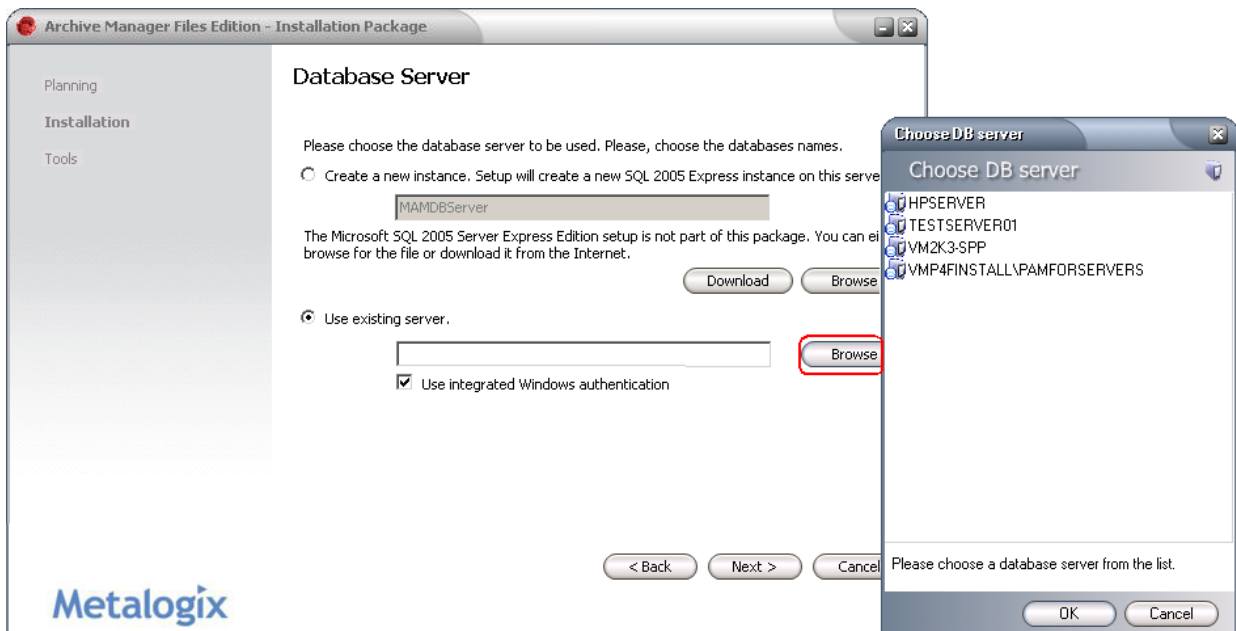
5. In the next dialog you can choose the installation folder. As the default the product installs in **C:\Program Files\Metalogix**. The installation folder can be changed using the **Browse** button. Click the *View EULA* links to read the License Agreement. If you agree, check the **I accept the terms of license agreement** check box. Then you can click **Next**.



6. Specify the super-user account under which the services will be running. This super-user should be a local administrator account. You can create a new account – just enter the account name as 'domain\user' and password for it. The install package will create the account with necessary rights. Or you can use an existing one. Enter it as 'domain\user' or use the **Browse AD** button to find the super-user. In the *Search Active Directory* pop-up window click **Find** to display available users. Select the super-user account from the list. Back in the installation dialog fill in its password and click **Next**.



7. In the next step specify the database server to be used by Archive Manager. Basically there are two options: (1) to create a new SQL 2005 Express instance or (2) to use an existing database server:

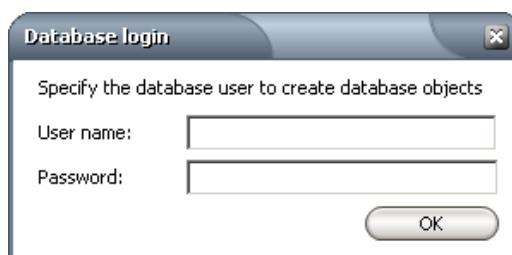


- To create a new SQL 2005 Express instance, check the **Create a new instance** option and enter the name for the database server instance in the text box. The MS SQL 2005 Server Express Edition is **not** a part of the Archive Manager installation package, however. You have to either

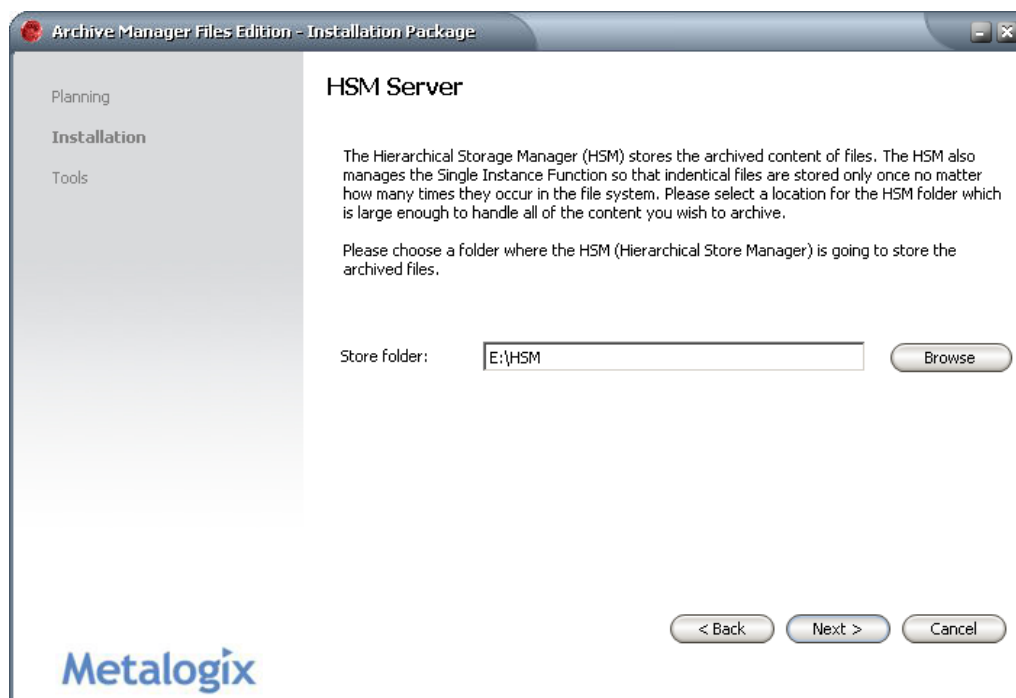
click **Download** to download the setup file from the Internet or **Browse** for it if you have saved it locally.

- To use an existing database check the **Use existing server** option. In the text box enter the name of the existing DB server or use the **Browse** button to locate it.

If the logged-on user has appropriate rights to administer the chosen SQL server, you can just check the **Use Integrated Windows authentication** text box to log on to that database server. Otherwise in the pop-up dialog you will have to specify the database user under which the database objects will be created.

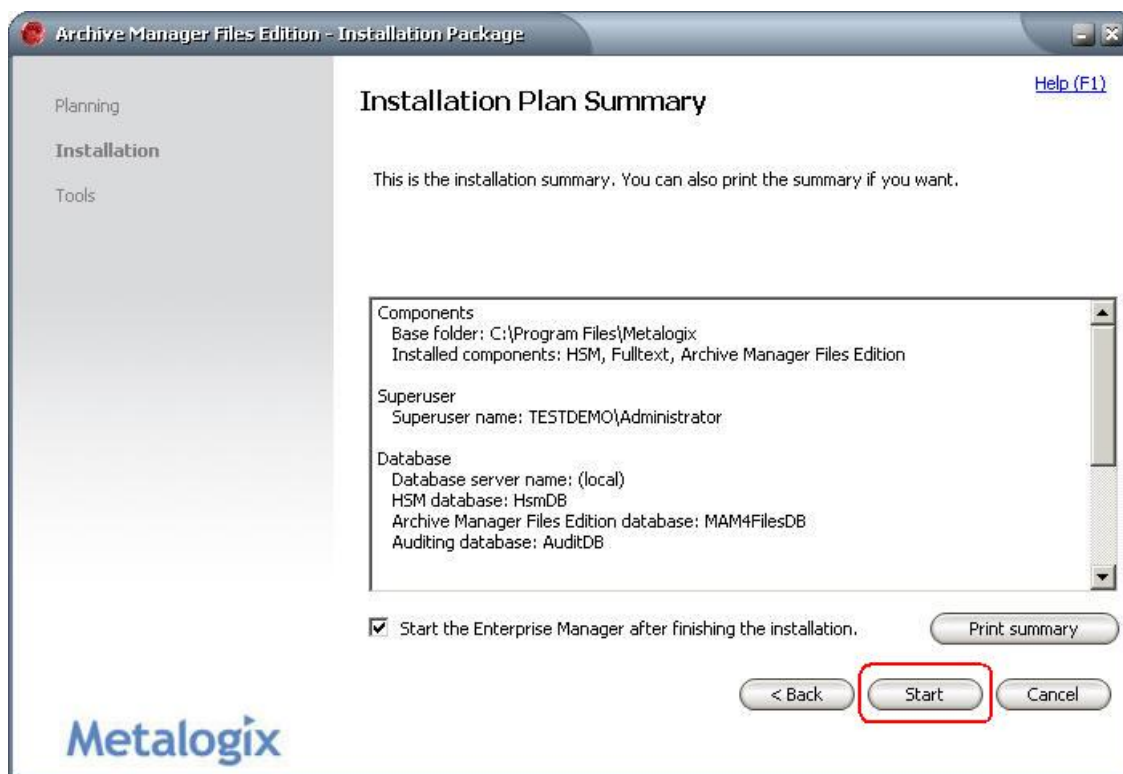


8. In the **HSM server** dialog choose the folder where archived files will be stored. The location of HSM needs to be a drive with plenty of free space to keep the stored files. The default folder is **C:\HSM**. As the location of HSM needs to be a drive with plenty of free space on strong hardware we RECOMMEND CHANGING the location by clicking the **Browse** button. After you have specified a suitable location click **Next**.

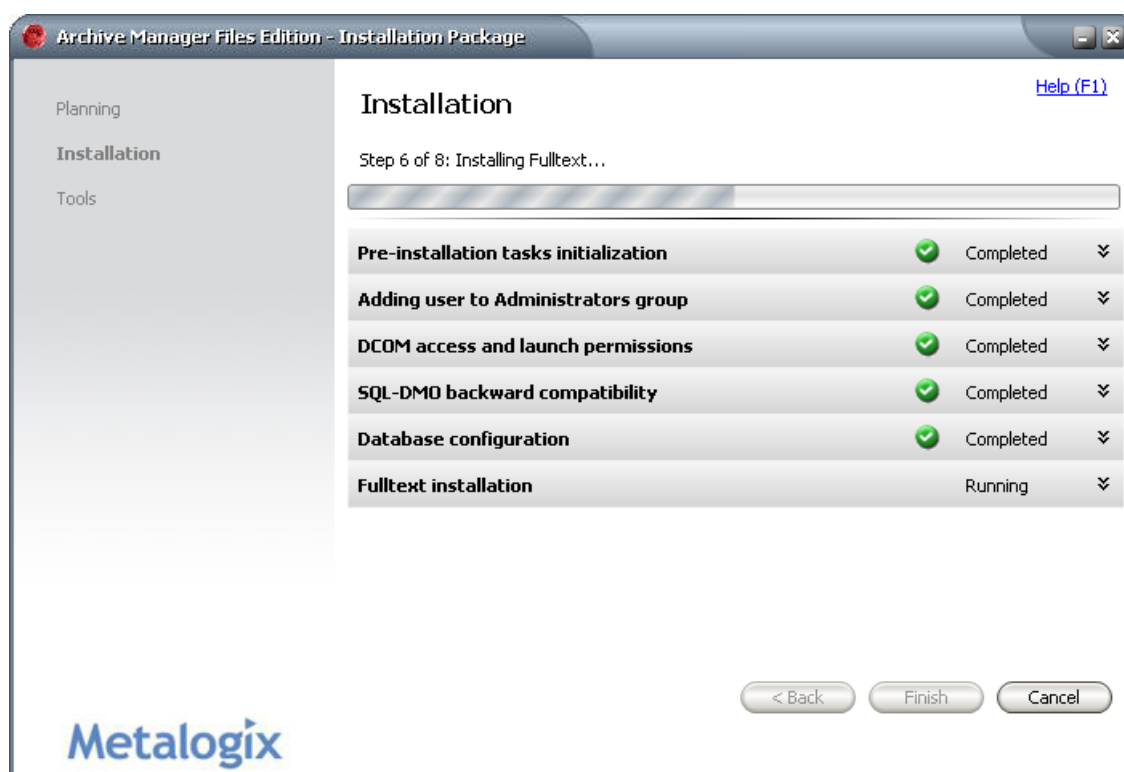


9. The installation summary displays settings you have specified in previous steps. It is useful to print the summary to document all your installation settings. Then click the **Start** button to start the installation.

NOTE: If the **Start the Enterprise Manager...** check box is marked, the Enterprise Manager – the administrative application of Archive Manager Files Edition - will be launched automatically when the installation finishes.



10. Wait while the components are being installed.



When the installation finishes click **Finish**. Now you can configure your archiving settings, create jobs and start archiving with **Enterprise Manager** (see the “Archive Manager Files Edition Manager, admin manual”).

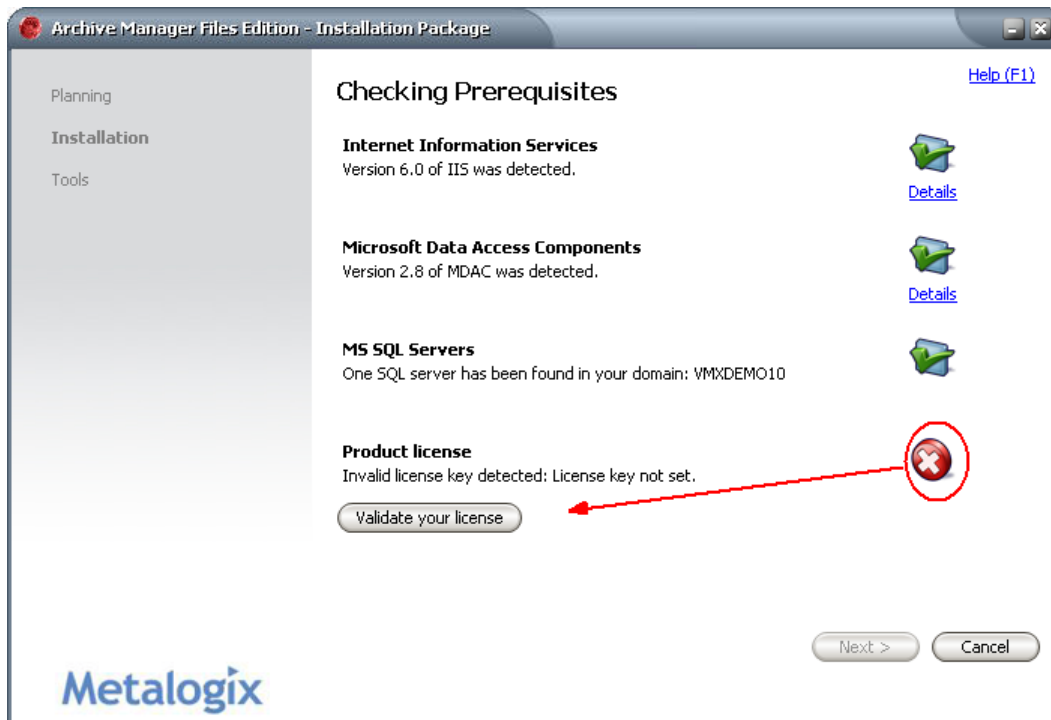
NOTE: In case of Windows Server 2008, please make sure that “Static Content” under Server Manager -> Server Roles-> Web Server (IIS) -> Role Services is checked.

Advanced installation

Advanced installation option allows you to select the components that you want to install. Use this option when not all components of Archive Manager are to be installed on one machine, e.g. if you have a separate HSM server and you want to install just Archive Manager without HSM. Using the *Advanced installation* the administrator can also change some of the installation parameters.

1. Click **Advanced installation**. Firstly, the wizard checks prerequisites:
 - IIS (necessary if you want to use HTML shortcuts, Celerra archiving or MS Search)
 - MDAC and
 - available MS SQL servers
 - License

We recommend that you install IIS and MDAC. MS SQL database can be installed by the setup itself. Click **Next**.

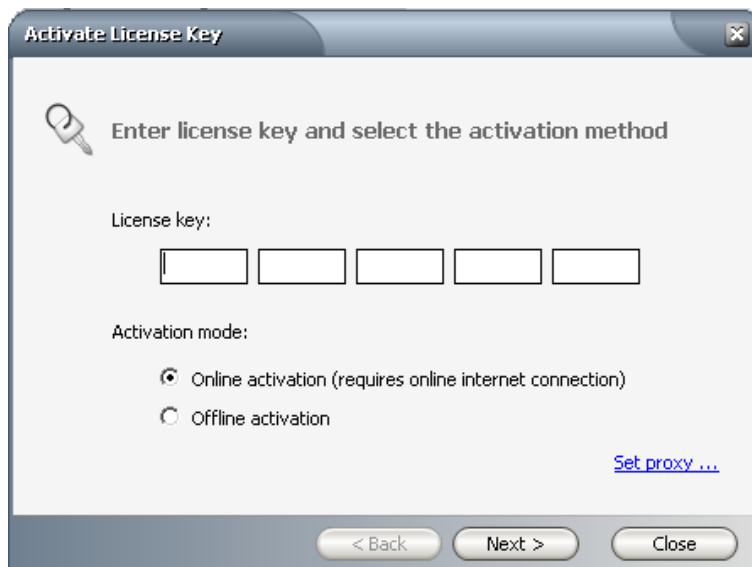


Before proceeding with installation, you need to apply the license. To do so, click **Validate your license** button. There can be two different situations:

- Archive Manager server has an internet connection (a)
- Archive Manager server has NO internet connection (b)

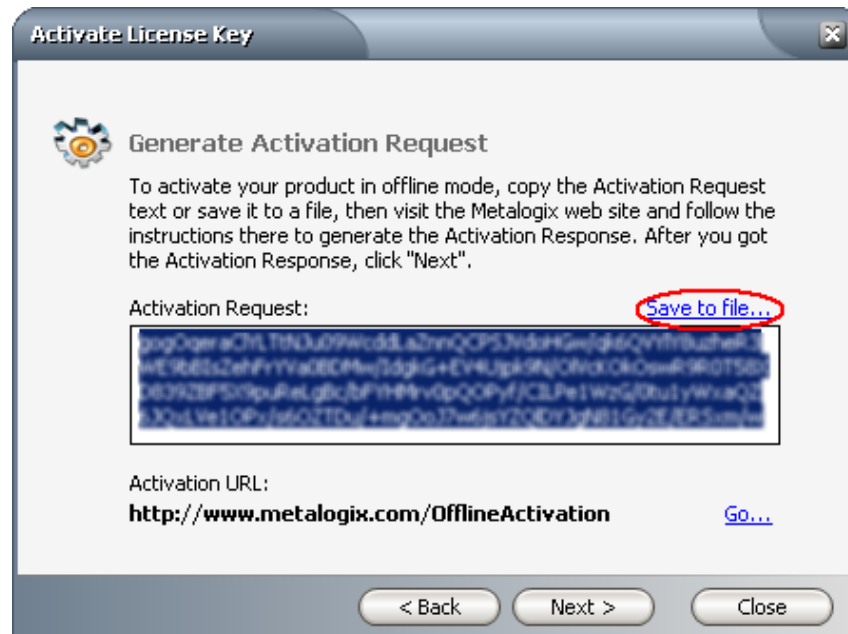
a) If the server has an internet connection, follow the next steps:

- Enter your license key and click **Next**.
NOTE: If the internet access is filtered out by proxy on the Archive Manager server, click the **Set proxy** link to enter the respective parameters.
- License will be validated and you can continue the installation.



b) If the server has NO internet connection, follow the next steps:

- Enter your license key.
- Select the **Offline activation** radio button and click **Next**.
- Copy the *Activation request* text from the **Activation request** text box or save it as a file (click the *Save to file* link)



- On the machine with internet access open the Metalogix Activation URL: <http://www.metalogix.com/OfflineActivation>
- Paste the *Activation Request* text you have copied or **Browse** for the file you have saved and click **Activate**
- *Activation text* is generated. Again copy the text or save it as a file
- Back on the Archive Manager server click **Next** to proceed to the **Enter your Activation Response** dialog. Paste the *Activation text* you have copied from the Metalogix web page or load the file.
- Click **Next**, then **Finish**.

When you have successfully applied the license, click **Next** in the install wizard to continue the installation.

2. In the next dialog you can choose the installation folder. As the default the product installs in **C:\Program Files\Metalogix**. The installation folder can be changed by using the **Browse** button.

Further select the components you want to install on the local machine. Check:

- **HSM** to install it on the local machine
NOTE: HSM can be used by all Archive Manager products. It means that if you already have an HSM storage installed with other Archive

Manager products, you may use it for Archive Manager Files Edition as well.

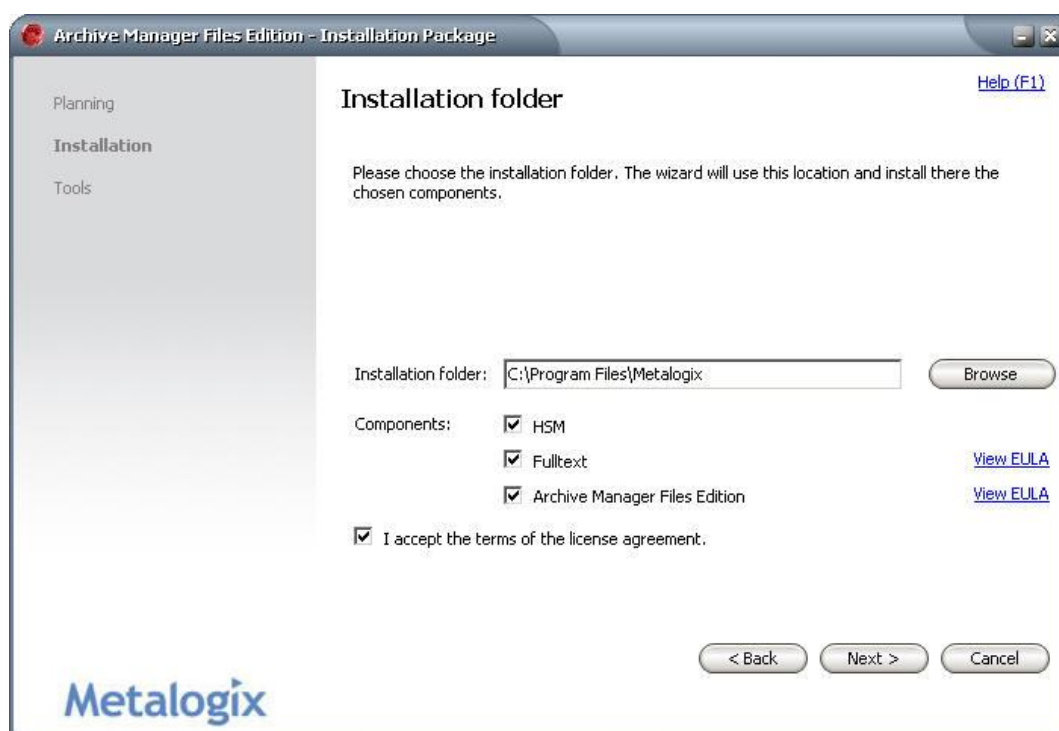
If you do not check to install HSM, you will have to specify the HSM server later, i.e. the computer where HSM is already installed

- **Fulltext** if you want to install it on the local machine. Fulltext search service ensures fast and effective searching through documents of various format

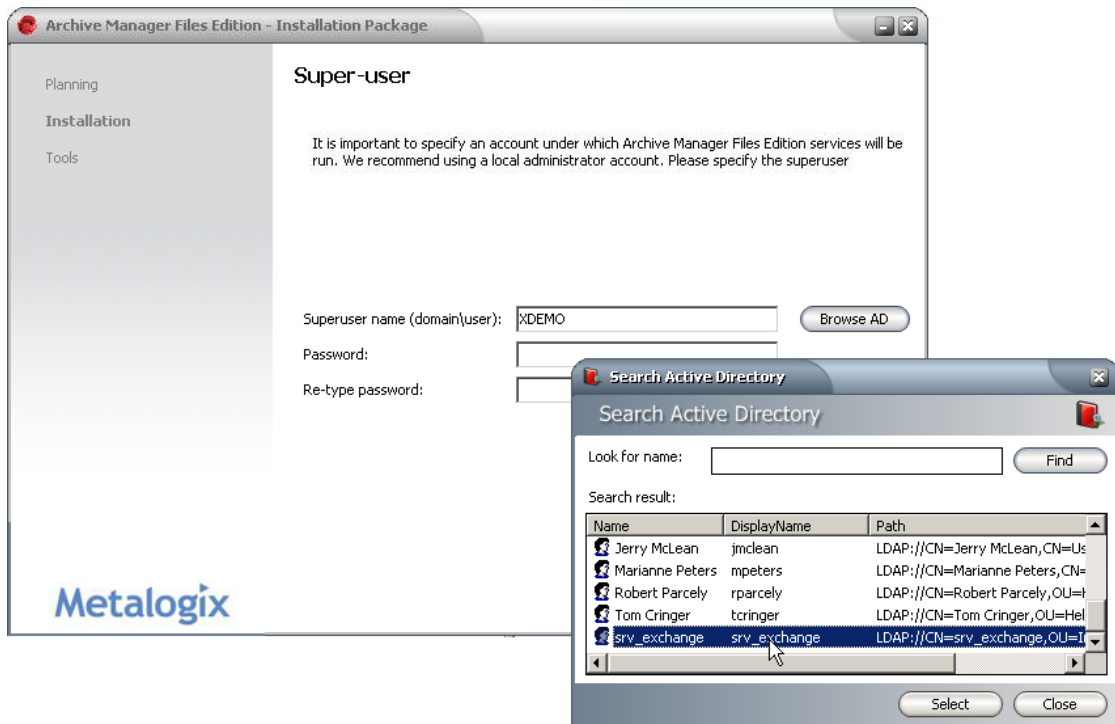
and/or

- **Archive Manager** to install it on the local machine

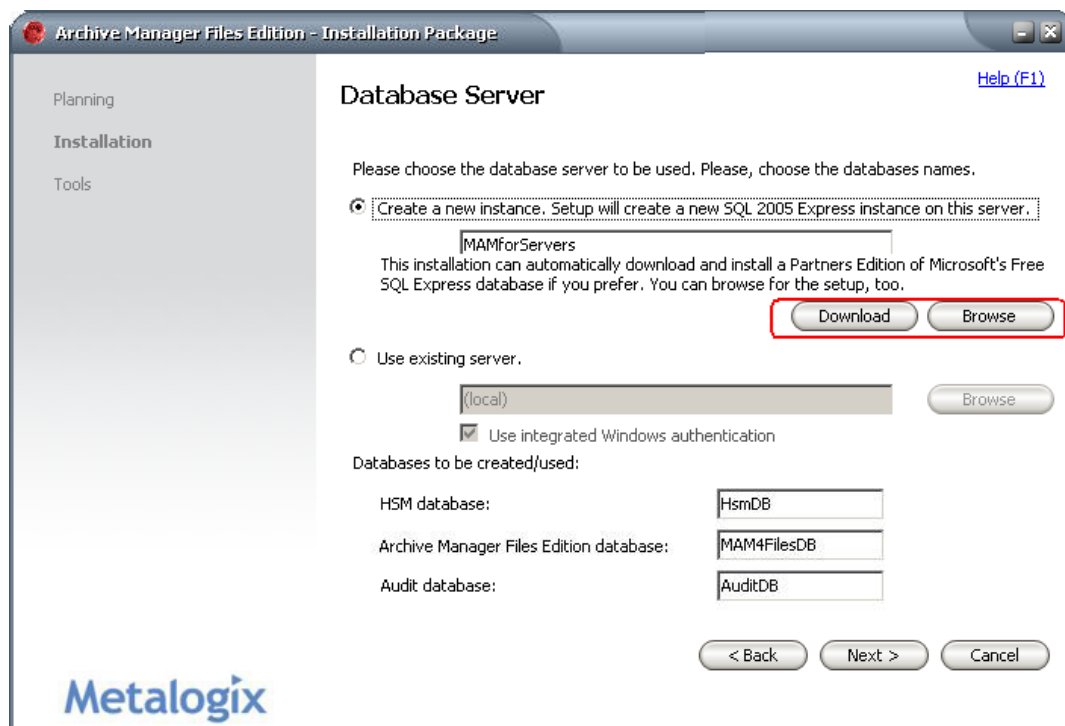
Click the *View EULA* links to read the License Agreement. If you agree, check the **I accept the terms of license agreement** check box. Then you can click **Next**.



3. Specify the super-user account under which the services will be running. This super-user should be a local administrator account. You can create a new account – just enter the account name as ‘domain\user’ and password for it. The install package will create the account with necessary rights. Or you can use an existing user. Enter it as ‘domain\user’ or use the **Browse AD** button to find the super-user. In the *Search Active Directory* pop-up window click **Find** to display available users. Select the super-user account from the list. Back in the installation dialog fill in its password and click **Next**.



- As a next step specify the database server to be used by Archive Manager. Basically there are two options: (1) to create a new SQL 2005 Express instance or (2) to use an existing database server:

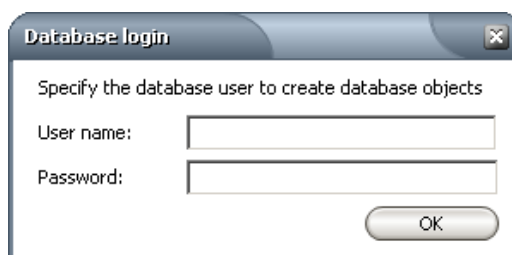


- To create a new SQL 2005 Express instance, check the **Create a new instance** option and enter the name for the database server instance in the text box. However, the MS SQL 2005 Server Express Edition is **not**

a part of the Archive Manager installation package. You have to either click **Download** to download the setup file from the Internet or **Browse** for it if you already have it saved locally.

- To use an existing database check the **Use existing server** option. In the text box enter the name of the existing DB server or use the **Browse** button to locate it.

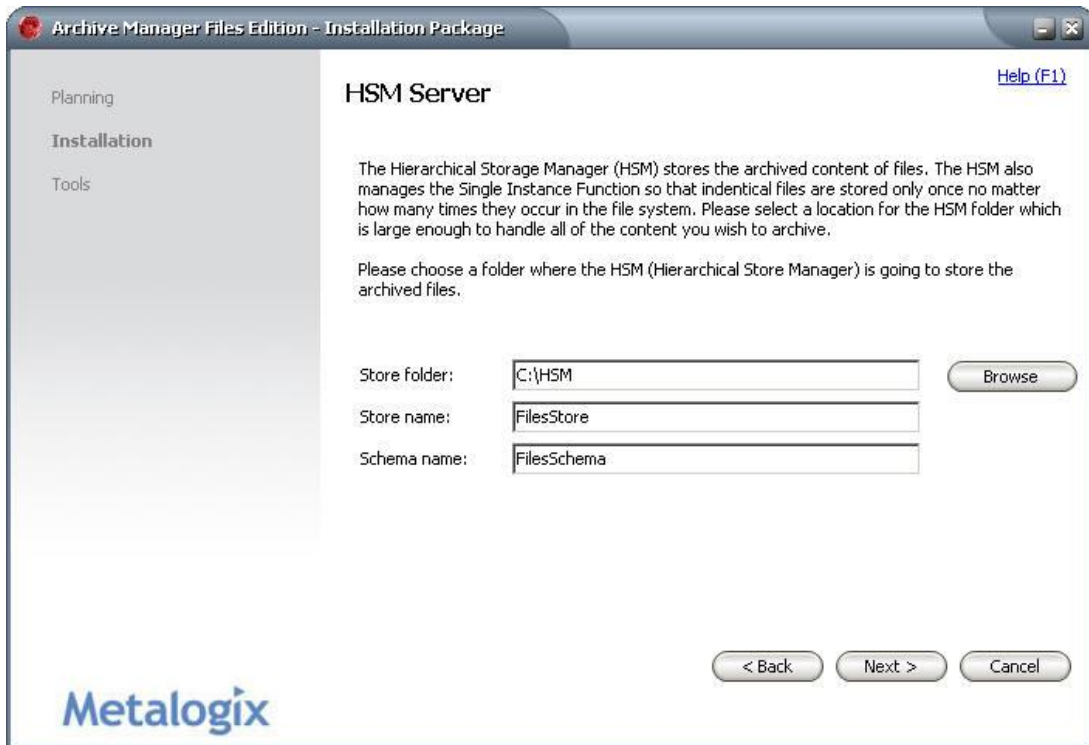
If the logged-on user has appropriate rights to administer the chosen SQL server, you can just check the **Use Integrated Windows authentication** text box to log on to that database server. Otherwise in the pop-up dialog you will have to specify the database user under which the database objects will be created.



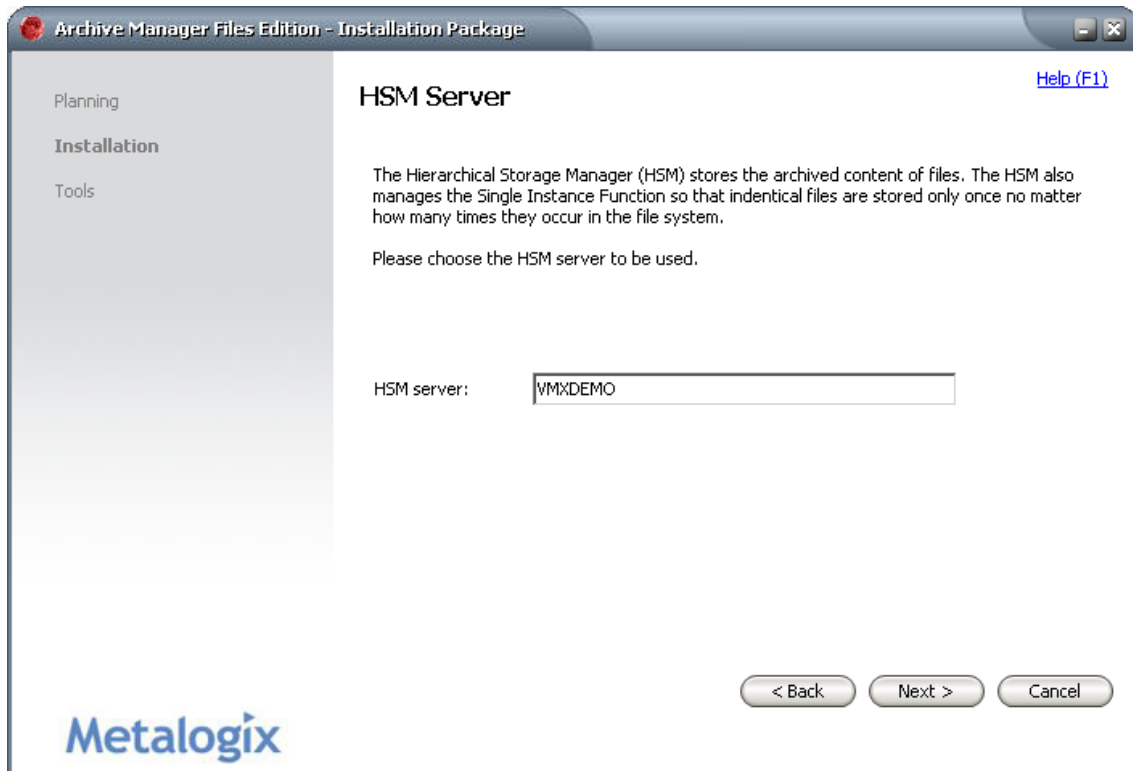
The default names for databases used by our product are filled in the **HSM database** text box (if you have chosen to install HSM as well), the **Archive Manager database** text box and the **Audit database** text box. You can rewrite the names if you wish. The databases will be created on the chosen server. Click **Next**.

5. In the **HSM server** dialog specify the location where the archived files will be stored:
 - If you have chosen to install HSM component on the local machine (see the step 2 of the Advanced installation), specify the folder where archived files will be stored. Note that the location of HSM needs to be a drive with plenty of free space to keep the stored files. The default folder is **C:\HSM**. As the location of HSM needs to be a drive with plenty of free space on strong hardware we RECOMMEND CHANGING the location by clicking the **Browse** button.

The **Store name** and **Schema name** text boxes display default names of the store and schema which will be created. You can change the names if you wish. Click **Next**.



- If you have chosen not to install HSM on the local machine (see step 2 of the Advanced installation), the HSM server dialog is different. In the **HSM server** text box you need to enter the name of the machine where HSM is installed. Finally click **Next**.



6. If you have chosen to install the fulltext service (see the step 2 of the *Advanced installation*), the **Fulltext search settings** dialog will be displayed. There are two fulltext search engines you can install:

- **Archive Manager Search Server**

If you have chosen this fulltext search engine, in the **Index folder** text box specify the folder where the search index will be stored. It has to be a location with plenty of free space as the size of the index is about 10% size of the whole archive.

In the same way specify the **Search cache** folder in the appropriate text box. The default location of these folders is under **C:\Program Files\Metalogix\MAMSearch**. To change it, use the **Browse** buttons.

IMPORTANT: To use the Archive Manager Search Service, you need to upload and enable the appropriate post-processing plugin. It is done after installation in the Enterprise Manager console. The plugin is called **PFPLuceneIndexPlugin** and can be found in **C:\Program Files \ Common Files \ Pam \ Services \ PamPostProcessing \ Plugins**.

- **MS Search**

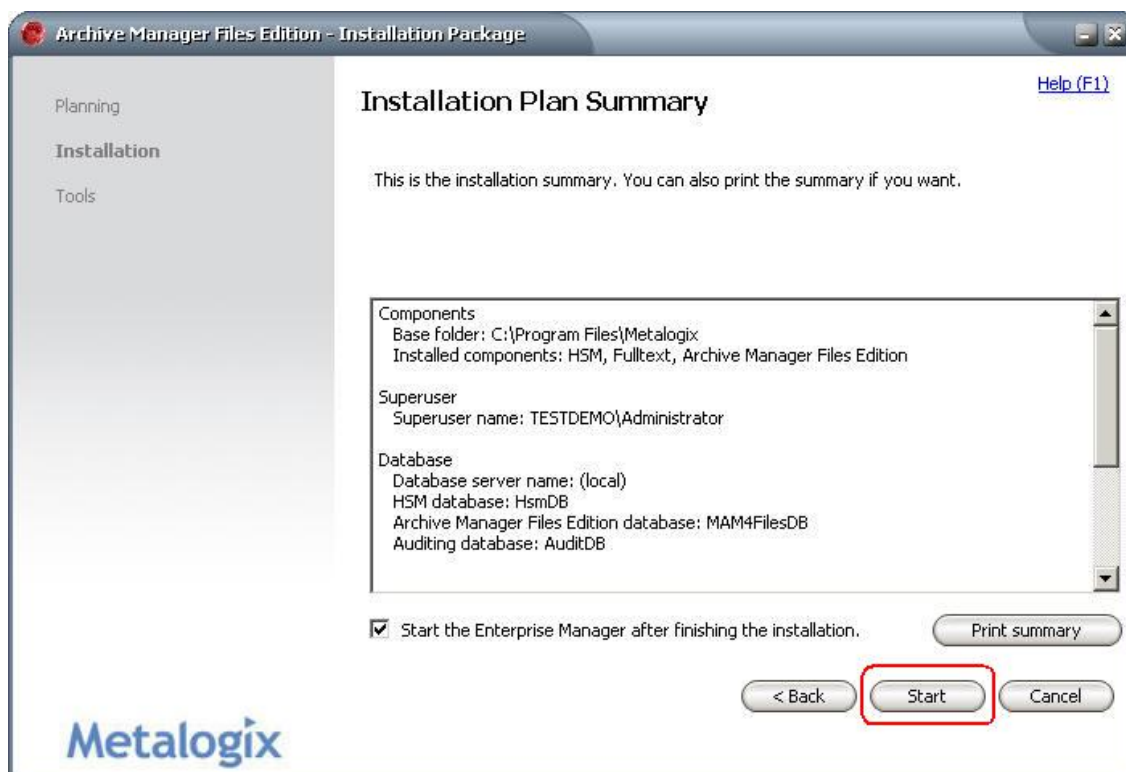
Prerequisites: MS Search Server 2008 or SharePoint Portal



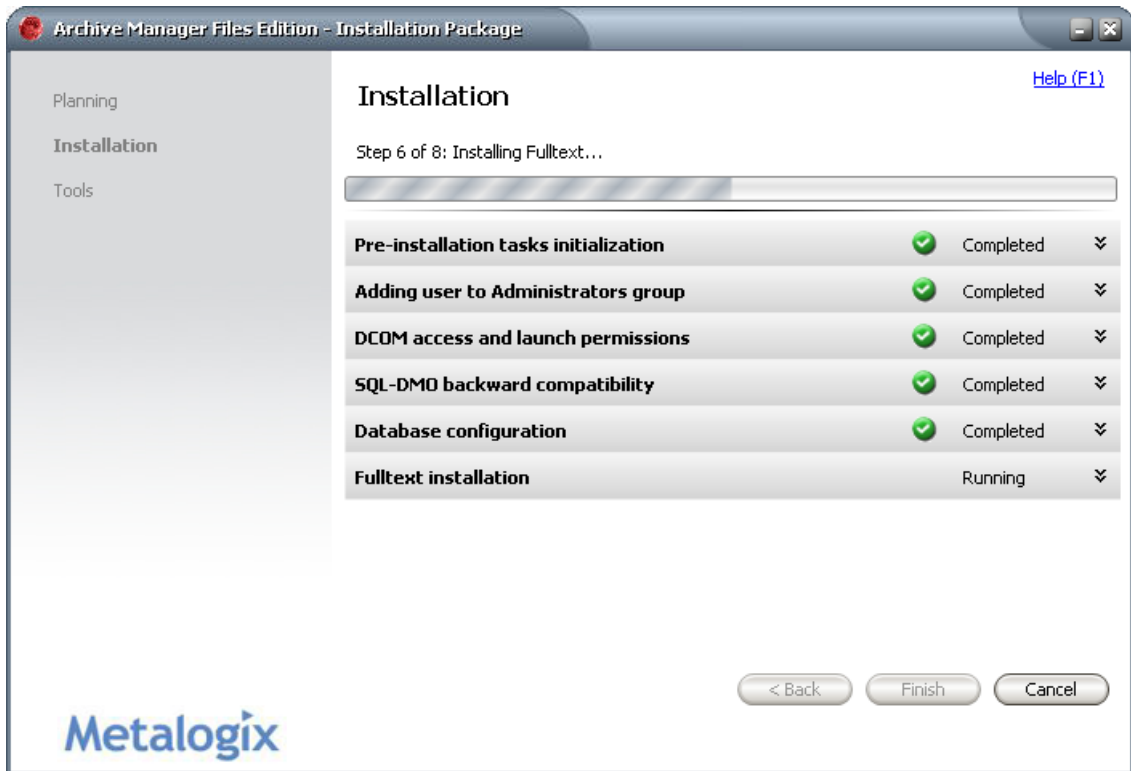
- Now allow installation package to add Archive Manager components (auditing) to the Windows Firewall Exception list. Archive Manager components will be then able to communicate through the firewall. Click **Next**.



- The installation summary displays settings you have specified in previous steps. It is useful to print the summary. Click **Start** button to start the installation.
NOTE: If the **Start the Enterprise Manager...** is checked, the Enterprise Manager – administrative application of Archive Manager - will be launched when the installation finishes.



9. Wait while the components are being installed.



When the installation finishes, click **Finish**. Now you can configure your archiving settings, create jobs and start archiving with **Enterprise Manager** (see the “Archive Manager Files Edition, admin manual”).

NOTE: In case of Windows Server 2008, please make sure that “Static Content” under Server Manager -> Server Roles-> Web Server (IIS) -> Role Services is checked.

Post Installation Tasks

In the following lines we describe IIS7 configuration. For IIS6 the process is similar. The FilePAMWebService handler mapping has to be configured in the following way:

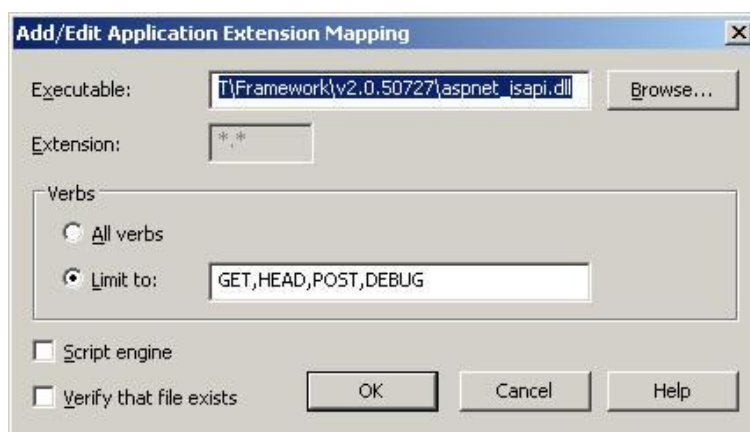
- Apply to '*. *'
- Apply to files and folders

NOTE: When adding *. * application extension mapping, specify the following settings:

Limit to: GET,HEAD,POST,DEBUG

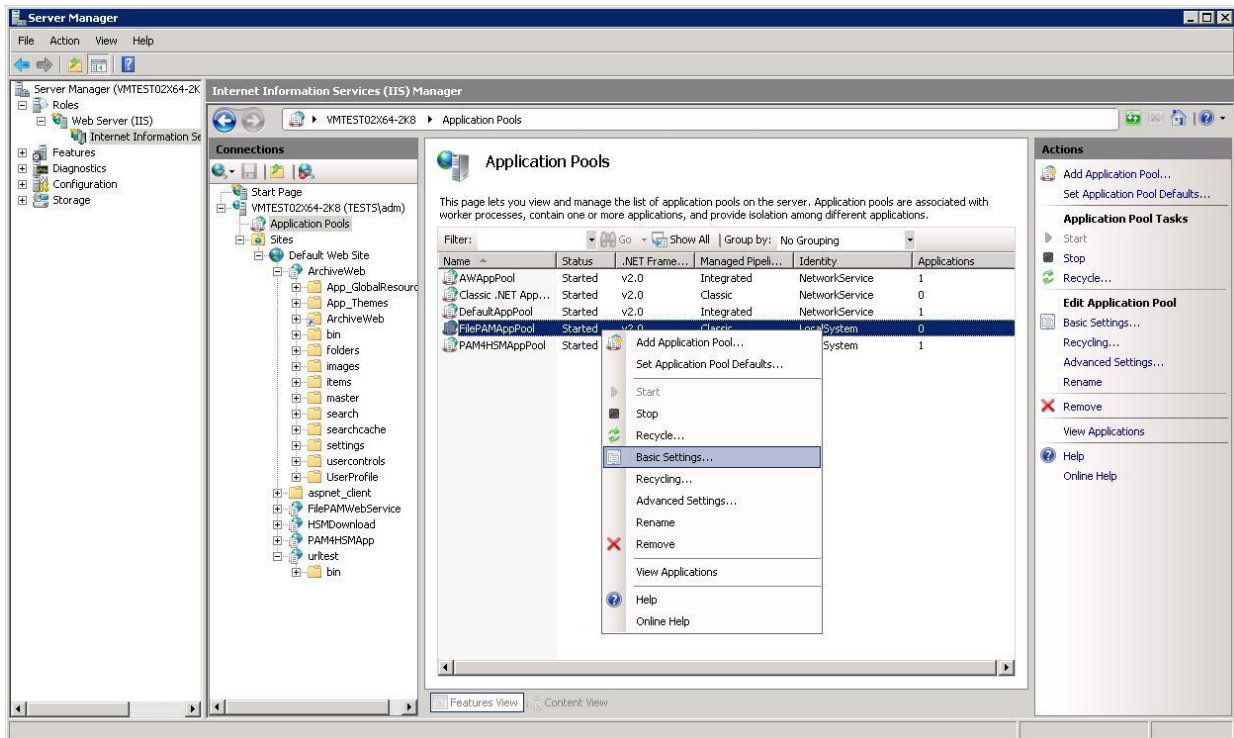
Script engine – unchecked

Verify that file exists - unchecked



In case of IIS7 environment on the Archive Manager Files Edition server, the following additional steps are required:

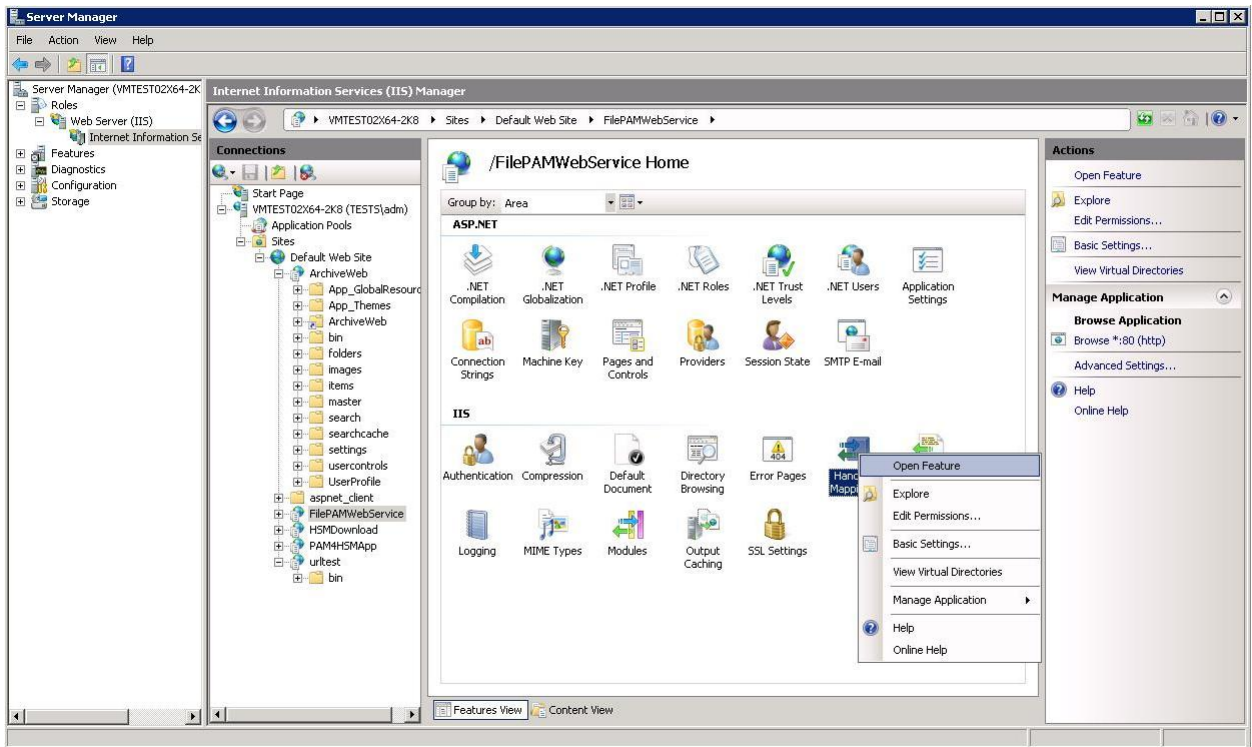
1. In the IIS Manager under <ComputerName>/Application Pools find the **FilePAMAppPool**. Right-click it and from the context menu select **Basic Settings**.



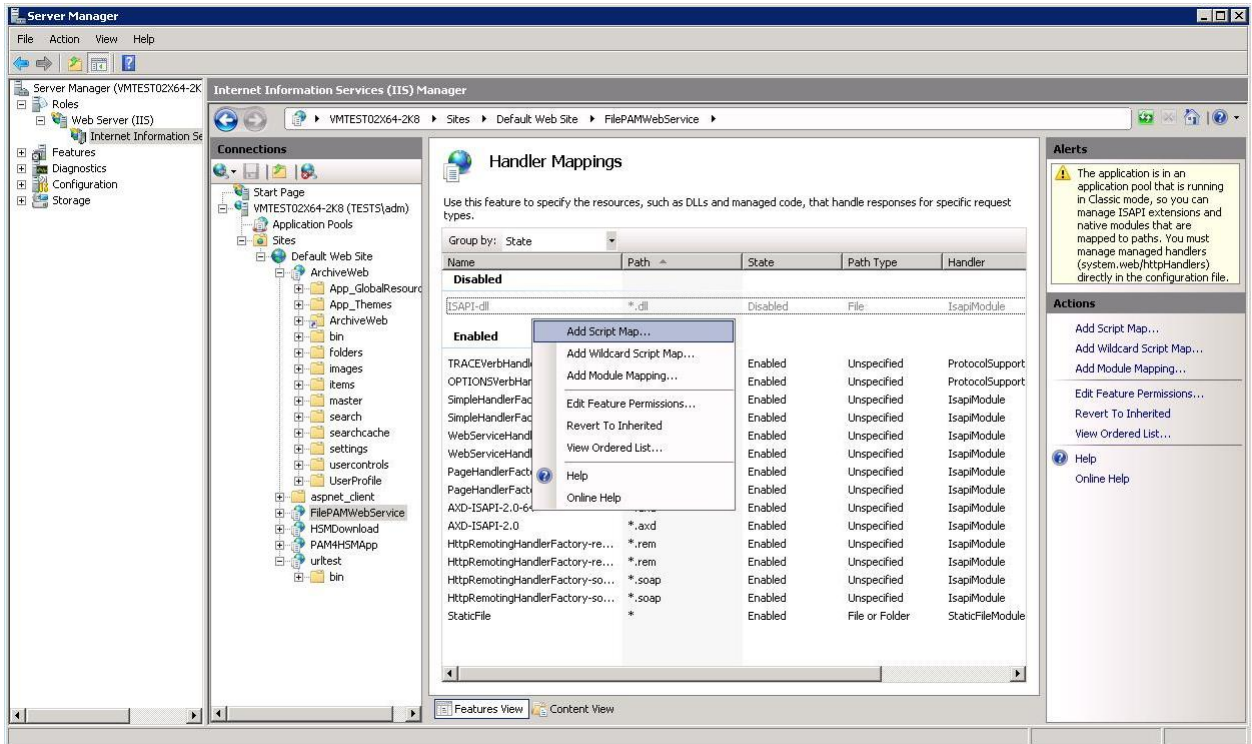
2. In the pop-up window change the pipeline mode to “Classic”. Click **OK**.



3. Back in the IIS Manager locate the <ComputerName>/Sites/Default Web Site/**FilePAMWebService**. Open the **Handler mappings** in the FilePAMWebService

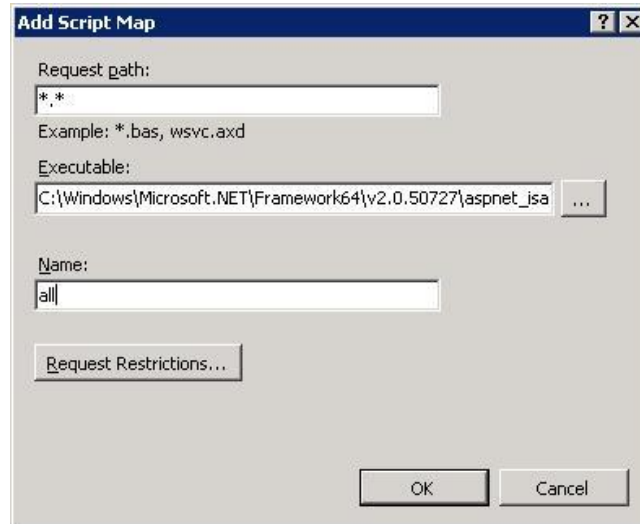


4. Right-click inside the main pane and select **Add Script Map** from the context menu.

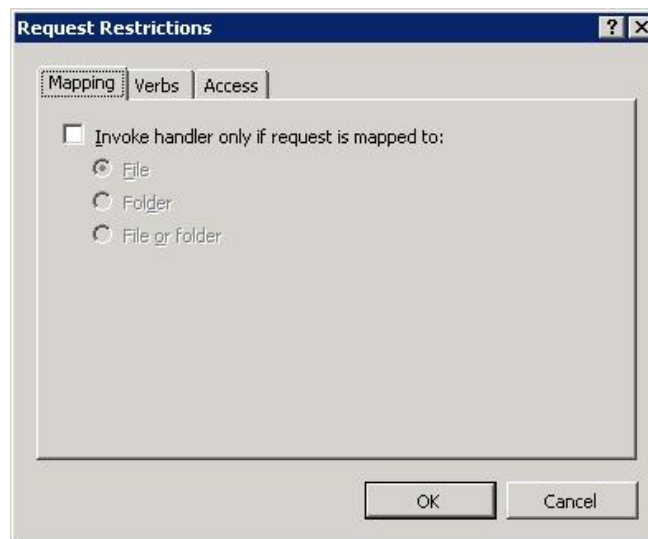


5. In the pop-up window set the new mapping properties:
 - a. Request path: *.*
 - b. Execute path: [PATH TO .NET FRAMEWORK]\aspnet_isapi.dll
 - c. Name: all

To continue click **Request Restrictions**.



10. In the **Request Restriction** dialog the Invoke handler only if request is mapped checkbox must be unchecked.

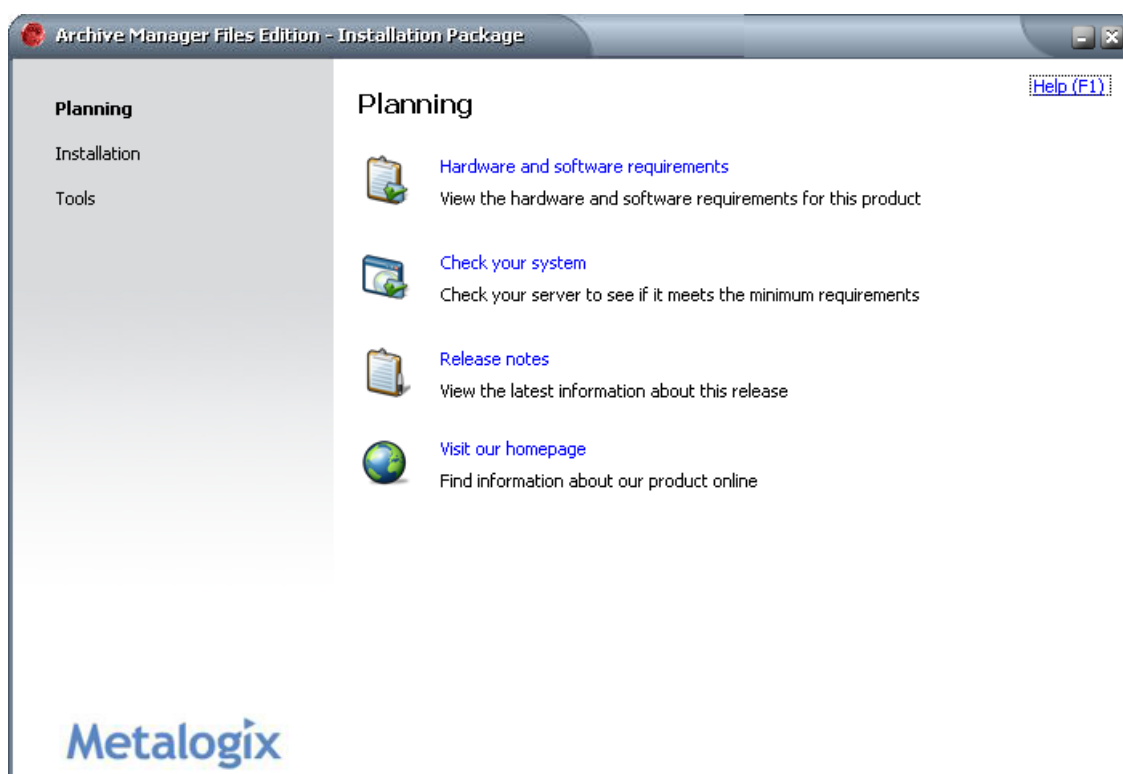


6. Click **OK** to save the new mapping.
7. Restart the application pool.

Planning and Tools tab

The **Planning** tab contains links to prerequisites and product information:

- Hardware and software requirements – opens prerequisites document
- Check your system – detects if IIS, MDAC and database are available; however, these are not necessary and database can be installed by the wizard
- Release notes for the Archive Manager Files Edition version being installed
- Link to our homepage



From the **Tools** tab you can launch:

- Configuration tool which allows you to configure Archive Manager and HSM databases



www.metalogix.com

Mail Support: [www.metalogix.com/Support](mailto:sales@metalogix.net)

Metalogix makes every effort to perform comprehensive testing but cannot guarantee, due to environmental differences, that all functions will work in every environment. It is always recommended that testing be conducted within your own environment to confirm functionality and compatibility.