

Metalogix[®] Archive Manager for Exchange 8.8

Common Upgrade 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 this document

This document describes the steps to upgrade Archive Manager for Exchange and its components for a single server environment. For multi-server deployments or other cases that require special upgrades from versions older than 8.2, please contact Quest <u>Technical Support Resources</u>.

Steps to download the install media

1. From your browser, navigate to the <u>https://www.quest.com/products/metalogix-archive-manager-for-exchange</u> page

or

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

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

Archive Manager for Exchange

Upgrading Metalogix Archive Manager implies that a previous version of Metalogix Archive Manager for Exchange is installed.

NOTE: Before you upgrade, we recommend you take a backup of the Archive Manager database.

Archive Manager for Exchange can be upgraded in one of two ways:

- automatically, with the Archive Manager installer. This method automatically upgrades Archive Manager for Exchange on the same server where it was previously installed.
- manually, using the *Archive Manager for Exchange Setup.exe* file. This method manually upgrades Archive Manager for Exchange on the same server where it was previously installed.

In this chapter:

- <u>Steps to automatically upgrade with the Archive Manager installer</u>
- Steps to manually upgrade with the Archive Manager for Exchange installer
- Steps to manually upgrade the Archive Manager for Exchange database

Steps to automatically upgrade with the unified product installer

- 1. Download the latest Metalogix Archive Manager for Exchange install media. For instructions see <u>Steps to download the install media</u>.
- 2. Run the Metalogix Archive Manager Installation Package to extract the files to a local folder.
- 3. The wizard checks whether the Metalogix Archive Manager for Exchange installation requires an upgrade. If it does, the **Upgrade** option will be selected automatically.



4. Click **Next.** The **Installation Components** page appears with a list of components that are already installed on the server. Select the components you want to upgrade. You should upgrade all the components to ensure the application features work as expected.

Archive Manager Installation W WELCOME PLANNING	and Installation Components		× Helo
INSTALLATION	Component	Setup	Installed
TOOLS	HSM	Y.Y.0.100	X.X.0.100
SETUPS	Archive Manager for Exchange	Y.Y.0.100	X.X.0.100
	Archive Manager Search	Y.Y.0.100	X.X.0.100
	ArchiveWeb	Y.Y.0.100	X.X.0.100
	Product description: HSM (Herarchical Sociage Management system) as a data storage system is a past of sev HSM adves storing of data (even all company data) on one or more file-servers. It is possible includes the Single Instance Store service (SIC), which ensures that identical content is at	aral Metalogix archivu e to use a shared sto red only once.	ng products. re as well, HSM
Metalogix		Back Next	> Cancel

5. Click **Upgrade.** The **Checking Prerequisites** page appears. A check is conducted to find out if a new prerequisite is needed for the upgrade.

Archive Manager Installation \	Vizard		×
WELCOME	Checking Prerequisites		Help
PLANNING INSTALLATION TOOLS	Microsoft Data Access Components Version 10.0 of MDAC was detected.		``
SETUPS	User Permissions User DEMOCORP\domadmin has all the necessary permissions.		8
	MAPI MAPI subsystem found. Microsoft Outlook is installed.		8
	Operating System Your operating system is supported.		8
	Microsoft Windows Features And Roles All the necessary Microsoft Windows Features And Roles are installed.		8
Metalogix	oLE DB Driver for SQL Server	< Back Refresh	Cancel

- 6. Click Next. The Superuser Account page appears. Specify and confirm the password.
 - **NOTE:** The **Superuser name** cannot be changed.

终 Archive Manager Installation Wi	izard			×
WELCOME	Superuser Account			Help
PLANNING				
INSTALLATION	It is important to specify an accou	int under which Metalogix services will be ru	inning. It must be a local administrator and must	
TOOLS	the domain, then this user should this account.	exist on the server with the newer version o	f Exchange. Please specify the credentials for	
SETUPS	Superuser name (domain\user):	DEMOCORP\domadmin		
	Password:]	
	Re-type password:			
Metalogix			< Back Next > Ca	ancel

- 7. Click **Next**. The **Summary Installation** page appears. This page presents information about component versions that will be installed after the update (**Setup version** column), and versions that are currently installed (**Installed version** column).
 - a. Select the check box **Start Metalogix Archive Manager for Exchange** to open the Archive Manager for Exchange Administration Center (AMAC).
 - b. Select the check box I understand that the operation cannot be undone... to confirm that you have acknowledged the upgrade. When the check box is checked, the Upgrade button is activated and you can proceed with the upgrade.

WELCOME	Summary Installation			Help
PLANNING				
NSTALLATION	Component	Setup version	Installed version	
TOOLS	HSM	Y.Y.0.100	X.X.0.100	
SETUPS	Archive Manager for Exchange	Y.Y.0.100	X.X.0.100	
	Archive Manager Search	Y.Y.0.100	X.X.0.100	
	ArchiveWeb	Y.Y.0.100	X.X.0.100	
	☐ Manage the Organizational Forms Library ☐ Sast Metadoxik Archive Manager for Exchance			

8. Click **Upgrade** to start the upgrade. Click **Back** to return to the previous page or click **Cancel** to exit the upgrade wizard. The upgrade progress for each component is displayed and the operation is confirmed. If the upgrade wizard detects that one or more features selected for upgrade are missing or damaged, the maintenance wizard for the feature will appear. Select the **Repair** option and complete the steps in the wizard to reinstall the feature.

Archive Manager Installation V	Nizard			>
WELCOME	Installation		He	b
PLANNING				
INSTALLATION	DCOM access and launch permissions	0	Completed	1
TOOLS	HSM	0	Completed	`
SETLIDS	Archive Manager for Exchange	0	Completed	,
	Archive Manager Multitenant	0	Completed	`
	Archive Manager Auditing	0	Completed	,
	Archive Manager Search	0	Completed	,
	Archive Manager Post-Processing	0	Completed	•
	ArchiveWeb	0	Completed	,
	Starting services	0	Completed	,
A				
Netalogix			Finish	

9. Click **Finish** to close the wizard when all the components are upgraded.

Steps to manually upgrade with the Archive Manager for Exchange installer

- Run the Archive Manager Search installer. the default location is C:\Archive Manager Installation Package\Archive Manager Search\Archive Manager for Exchange Setup.exe. The Welcome window opens.
 - **NOTE**: A prerequisite check occurs and missing requirements if any are displayed. Install the prerequisites.

Archive Manager for Exchange		×
	Welcome to the InstallShield Wizard for Archive Manager for Exchange	
	The InstallShield Wizard will update the installed version (X.X.0.0) of Archive Manager for Exchange to version Y.Y.0.0. To continue, click Next.	
	< Back Next > Cancel	

2. Click Next. The Logon Information window opens.

Logon Information	
Specify a user account and password.	
Specify the user account to be used by DOMAIN(Username.	this application. User accounts must be in the format
Username:	
democorp\domadmin	
Password:	
•••••	
Confirm password:	
Confirm password:	
Confirm password:	
Contirm password:	
stallShield	

Click Next. The *Firewall Settings* window opens. Select the check box to allow communications through server firewalls. By default, the Allow programs to communicate through Windows
 Firewall is checked. This will allow critical services to communicate with the Archive Manager for Exchange service. If you clear the check box, critical services may not be able to communicate through the firewall.



4. Click Next. The Ready to modify the program window opens.



5. Click **Update** to upgrade Search. If you want to review or change the wizard settings, click the **Back** button. To exit the wizard click **Cancel**. When the upgrade completes the *Update Complete* window opens.

Archive Manager for Exchange	
	Update Complete
	The InstallShield Wizard has updated Archive Manager for Exchange to version Y.Y.0.0.
	Launch Post Installation Tasks
	< <u>B</u> ack Finish Cancel

6. Select Launch Post Installation Tasks to open the *Archive Manager Configuration Tool* to manually upgrade the Archive Manager for Exchange database. Click **Finish**.

Steps to manually upgrade the Archive Manager for Exchange database

If you choose this manual process and database scripts are upgraded, you must run the scripts manually from the *Archive Manager Configuration Tool* for three components: **Exchange Archive**, **Auditing** and **Users**.

- 1. From the feature panel on the left in the *Archive Manager Configuration Tool*, click **Exchange Archive** and select the **Database** tab.
- 2. Verify that the database connection information is as expected. Then click **Run Scripts**. The *Run Scripts* selection window opens.
- 3. Click Select All to select all check boxes. Click Next. The View SQL scripts window opens.
- 4. Click **Next**. The *Run Scripts* authentication window opens. Enter the information as described below:
 - a. Authentication authentication type used for the database. Choose either Windows authentication or SQL Server authentication
 - a. **Database user** database login username if *SQL Server authentication* is the selected as the authentication mode.
 - b. **Password** password of the database user if *SQL Server authentication* is the selected as the authentication mode.
 - c. (optional) Check the I want to review the SQL Scripts check box to view the scripts.
- 5. Click **Next**. If you chose to view the SQL scripts then the *View SQL scripts* window opens. If you chose to view the Oracle scripts then the *View Oracle scripts* window opens

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

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

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

For Auditing

- 1. From the feature panel on the left in the *Archive Manager Configuration Tool*, click **Auditing** and select the **Database** tab.
- 2. Repeat steps 2 to 7 as described above.

For Users

- 1. From the feature panel on the left in the *Archive Manager Configuration Tool,* click **Users** and select the **Database** tab.
- 2. Repeat steps 2 to 7 as described in the previous section.

HSM

You can automatically upgrade HSM with the Archive Manager installer. If you need to manually upgrade HSM, follow the steps described below.

NOTE: Upgrading HSM does not upgrade third party file storage systems used as HSM stores. Refer to the upgrade manuals for the third party file storage products.

In this chapter:

- Steps to manually upgrade with the HSM installer
- Steps to manually upgrade the HSM database

Steps to manually upgrade with the HSM installer

- 1. Log in to the HSM server with the credentials of the superuser (eg. democorp\domadmin)
- 2. Download the installation media. For more information see <u>Steps to download the install</u> <u>media</u>.
- 3. Run the Metalogix Archive Manager Installation Package to extract the files to a local folder.
- 4. Close the unified installer wizard which starts automatically.
- 5. Run the HSM setup from <Media folder>\Archive Manager Installation Package\HSM\HSM Setup.exe
 - **NOTE:** A prerequisite check occurs and missing requirements if any are displayed. Install all missing requirements before you proceed.
- 6. The *Welcome* window of the HSM installer opens.



7. Click Next. The Logon Information window opens.

SM	>
Logon Information Specify a user account and pas	sword.
Specify the user account to be DOMAIN\Username.	used by this application. User accounts must be in the format
Username:	
democorp\domadmin	
Password:	
Confirm password:	
stallShield	
	< Back Next > Cancel

8. Click **Next**. The **Firewall Settings** window opens if the Windows Firewall is active on your computer. By default, the **Allow programs to communicate through Windows Firewall** is checked. This will allow critical services to communicate with the HSM service. If you clear the check box, critical services may not be able to communicate through the firewall.



9. Click **Next**. The *Ready to update the program* window opens.



10. Click **Update** to upgrade HSM. If you want to review or change the wizard settings, click the **Back** button. To exit the wizard click **Cancel**. When the upgrade completes the *Update Complete* window opens.

НЅМ	
	Update Complete
	The InstallShield Wizard has updated HSM to version Y.Y.0.0. To continue, click Next.
	< Back Finish Cancel

11. Click **Finish** to close the installer.

Steps to manually upgrade the HSM database

If you choose the manual upgrade process, you must run the scripts manually from the Archive Manager Configuration Tool.

- 1. From the feature panel on the left in the *Archive Manager Configuration Tool*, click **HSM** and select the **Database** tab.
- 2. Verify that the database connection information is as expected. Then click **Run Scripts**. The *Run Scripts* selection window opens.
- 3. Click Select All to select all check boxes. Click Next. The View SQL scripts window opens.
- 4. Click **Next**. The *Run Scripts* authentication window opens. Enter the information as described below:
 - a. Authentication authentication type used for the database. Choose either Windows authentication or SQL Server authentication

HSM

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

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

- 6. Click **Next**. The *Run SQL scripts* window reopens with the scripts you have chosen to run.
- 7. Click **Next**. When the status changes to *Scripts were run successfully*, click **Finish** to close the script installer. The *Scripts* section of the **Database** tab displays the status and updated version of the scripts.

Outlook Addin

Steps to upgrade

- 1. Login to the client computer with the enterprise administrator credentials.
- 2. Close all running applications. Open **Task Manager** and verify that the process *Outlook.exe* is not running.
- 3. Download and unzip the installation package to a suitable media folder. For more information see <u>Steps to download the install media</u>.
- 4. Run the installer. The default location is C:\Metalogix\Archive Manager Installation Package\Exchange\Addin\Archive Manager Outlook Addin x86 Setup.msi Or Archive Manager Outlook Addin x64 Setup.msi
 - **NOTE:** Necessary prerequisites will be checked. If any prerequisite must be installed, the setup will indicate the prerequisites. Download and install the software.



5. Click **Next**. The *Retrieve, Archive server names* window opens. Enter the names of Archive Manager Retrieve and Archive servers. If Archive and Retrieve Servers are the same as in a standalone deployment, enter the same name in both text boxes. If you do not know this names please contact your system administrator.

🛃 Archive Manager Outlook Addin x86	-		×
Retrieve, Archive server names			ange
Please enter the Retrieve and Archive server names			
Retrieve Server:			
AMXSERVER			
Archive Server:			
AMXSERVER			
Cancel < B	ack	<u>N</u> ext	>

6. Click **Next**. The *Select Installation Folder* window opens. Accept the default folder path or click **Browse** to select a different folder.

婦 Archive Manager Outlook Addin x86	_		×
Select Installation Folder		ALC: NO	
The installer will install Archive Manager Outlook Addin x86 to the following fo	older.		
To install in this folder, click "Next". To install to a different folder, enter it beli	ow or c	lick "Brow	ise".
C:\Program Files (x86)\Metalogix\Archive Manager Outlook Addin x8E		Bīowse	
		<u>D</u> isk Cost	
Cancel < Back		<u>N</u> ext	>

7. You can determine the space requirement and availability by clicking **Disk Cost**.

_						
1	🖟 Archive Manager Outlook Addin x86 Disk Space					×
	The list below inclu with each drive's a	udes the drives y available and req	ou can install Ar uired disk space	chive Manager Ou	tlook Addin x86 to, a	along
	Volume	Disk Size	Available	Required	Difference	
	🖃 A:	0KB	OKB	0KB	ОКВ	
	🖃 C:	126GB	102GB	33MB	102GB	
	D:	15GB	14GB	OKB	14GB	
					01	K

8. Click Next. The Confirm Installation window opens.



9. Click Install.

儼 Archive Manager Outlook Addin x86	-		×
Installation Complete		(C
Archive Manager Outlook Addin x86 has been successfully installed.			
Click "Close" to exit.			
Please use Windows Update to check for any critical updates to the .NET	Frame	work.	
Cancel < <u>B</u> ack	(lose

10. Click Close.

11. Open the Outlook client. Click **File** > **Options** to open the the *Outlook Options* window. Then click **Add-ins** and verify that the Archive Manager Outlook Addin is listed.

Outlook Options			?	×
General	View and manage Microsoft Office Add-ins.			
Mail				
Calendar	Add-in Options			
People	Launch Add-in options dialog: Add-in Options			
Tasks	Add-ins			
Search	Add-IIIS			
	Name A	Location	Type	*
Language	Active Application Add-ins	-		
Ease of Access	Archive Manager Outlook Addin x86	file:///ExchangeAddin.vsto vstolocal	COM Add-in	
	Microsoft Exchange Add-in	C:\e16\ADDINS\UmOutlookAddin.dll	COM Add-in	
Advanced	Microsoft SharePoint Server Colleague Import Add-in	C:\e16\ADDINS\ColleagueImport.dll	COM Add-in	
Customize Ribbon	Outlook Social Connector 2016	C:\ffice16\SOCIALCONNECTOR.DLL	COM Add-in	
	Redemption Helper Outlook Extension	C:\ager Outlook Addin x86\MyDII.dll	COM Add-in	
Quick Access Toolbar				
Addaine	Inactive Application Add-ins			
Add-Ills	Microsoft VBA for Outlook Addin	C:\t\Office16\ADDINS\OUTLVBA.DLL	COM Add-in	
Trust Center				
	Disabled Application Add-ins			Ŧ
	Add-in: Archive Manager Outlook Addin x86	5		
	Publisher: <none></none>			
	Compatibility: No compatibility information availal	ble		
	Location: file:///C:\Program Files (x86)\Metalo	ogix\Archive Manager Outlook Addin x86	(
	PAM4ExchangeAddin.vsto/vstolocal			
	Description: Archive Manager Outlook Addin x86	5 an addin created with VSTO technolog	IY.	
				-
	Manage: COM Add-ins 🔻 Go			
		OK	Cance	el

12. Click **OK** to close the *Outlook Options* window.

OWA Extension

Steps to upgrade

- 1. Download and unzip the installation package to a suitable media folder. For more information see <u>Steps to download the install media</u>.
- 2. Run the OWA Extension installer. The default location is C:\Metalogix\Archive Manager Installation Package\OWA Extension\Archive Manager OWA Extension Setup.exe. The Welcome window opens.

Archive Manager for Exchange	e OWA Extension	×
	Welcome to InstallShield Wizard for Archive Manager for Exchange OWA Extension The InstallShield Wizard will update the installed version (X.X.0.0) of Archive Manager for Exchange OWA Extension to version Y.Y.0.0. To continue, dick Next.	
	< Back Next > Cancel	

3. Click **Next**. The *Logon Information* window opens. Verify that the superuser **User name** is the same. Then re-enter the **Password** and **Confirm Password**. You can change the credentials if you want.

rchive Manager for Exchange OWA Extension	on		×
Logon Information			
Specify super user account and password.			
Specify super user account to be used by th DOMAIN\Username.	is application. It must b	e in the format	
User name:			
democorp\domadmin			
Descus de			
Password:			
•••••			
Confirm password:			
•••••			
L			
nstallShield			
	c Pack N	lovt >	Cancel
		ext >	Cancel

4. Click **Next**. The *Ready to update the program* window opens. If you want to review or change the wizard settings, click the **Back** button. To exit the wizard click **Cancel**. When the upgrade completes the *Update Complete* window opens.



 Click Upgrade. The *Configuration parameters* window opens. Select either Exchange Server or Office 365. The default exchange server selection and property values may be different. Please review and revise the values as described below.

For Exchange Server:

etup wizard			- ×
Configuration parameters			
	Curkener Server	005	
Microsoft Exchange OWA URL:	Exchange Server	O Onice 365	
https://amxserver			
Archive Manager OWA Extension URL:			
https://amxserver			
Archive Manager ExchangePamWS URL	.:		
https://AMXSERVER/exchangePAMWS	exchangePAMWS.asmx		
Archive Manager MultiTenantWS URL:			
https://amxserver/MultiTenantWS/Multi1	FenantWS.svc		
Microsoft Exchange Web Service URL:			
https://amxserver/EWS/Exchange.asmx			
	< Back	Next> C	Cancel

Microsoft Exchange OWA URL - URL of the Microsoft Exchange server.

Archive Manager OWA Extension URL - URL of the server where the OWA extension is installed.

Archive Manager ExchangePamWS URL - URL for the ExchangePamWS service. This service is installed on the Archive Manager server.

Archive Manager Multi TenantWS URL - URL of the MultiTenantWS service. This service is installed on the Archive Manager server.

Microsoft Exchange Web Service URL - URL of the Exchange web service in the format https://<exchange-server>/ews/exchange.asmx. The Exchange Web Service is a set of web services to access the mailboxes on Exchange Server. This web service is normally installed on Exchange Servers with the CAS role.

For Office 365:

Setup wizard			- ×
Configuration parameters			
Microsoft Exchange OWA URL:	Exchange Server	Office 365	
https://outlook.office365.com			
Archive Manager OWA Extension URL:			
https://amxserver			
Archive Manager ExchangePamWS URL			
https://AMXSERVER/exchangePAMWS	/exchangePAMWS.asmx		
Archive Manager MultiTenantWS URL:			
https://amxserver/MultiTenantWS/MultiT	enantWS.svc		
Microsoft Exchange Web Service URL:			
https://outlook.office365.com/EWS/Excl	hange.asmx		
	< Back	Next > Cano	cel

Microsoft Exchange OWA URL - read only property. Default value is

https://outlook.office365.com

Archive Manager OWA Extension URL - the URL used to access OWA from the internet. If you use multiple URLs to access OWA, please use the one which is accessible to most of the users.

Archive Manager ExchangePamWS URL - URL for the ExchangePamWS service. This service is installed on the Archive Manager server.

Archive Manager Multi TenantWS URL - URL of the MultiTenantWS service. This service is installed on the Archive Manager server.

Microsoft Exchange Web service URL - read only property. Default value is https://outlook.office365.com/EWS/Exchange.asmx

6. Click **Next**. **Exchange Web Services Credentials** window fill in the credentials of the superuser which runs the Archive Manager services. It was specified during the installation of the Archive Manager.

For Exchange Server:

Setup wizard		= ×
Exchange Web Services	Credentials	
Please enter the supe impersonate in Excha	eruser credentials. This user will be used to nge Web Services.	
Domain:	democorp	
User:	domadmin	
Password:		
Confirm password:	*******	
	<pre></pre>	Cancel

Enter the properties as described below:

- Domain enter the domain name
- User enter the username
- Password enter the password
- Confirm password confirm the password you entered

For Office 365:

Setup wizard	= X
Exchange Web Services	Credentials
Please enter the super impersonate in Exchar	ruser credentials. This user will be used to ge Web Services.
User:	domadmin@democorp.onmicrosoft.com
Password:	
Confirm password:	*****
Endpoint type:	Worldwide endpoints \sim
	Kack Next > Cancel

Enter the properties as described below:

- User enter the Microsoft 365 username
- Password enter the password
- Confirm password confirm the password you entered
- Endpoint type Choose from one of the following endpoints:
 - Worldwide endpoints
 - \circ U.S. Government DoD endpoints
 - o U.S.Government GCC High endpoints
 - Microsoft 365 Germany endpoints
- 7. Click **Next**. The *Server Information* window opens.

Setup wizard	= 🛛
Server information	
Primary Archive Server:	
amxserver	
Secondary Archive Server:	
amxserver	
OWA cache folder path: C:\Program Files\Metalogix\MAM4exchange\Web\OWACache\	Browse
Install OWA with new application ID *	
* Select this option to install OWA for multiple Archive servers in multiple locations	
< Back Next >	Cancel

Enter the information as described below:

- Primary Archive Server name of your Archive Manager Archive Server.
- Secondary Archive Server name of your Archive Manager *Retrieve* Server. For a singleserver deployment, the server name is the same as the **Primary Archive Server**. The secondary server will be used if the primary is not available.
- **OWA cache folder path** By default, the cache folder is created under the **Web** folder. Use the **Browse** button to change the OWA cache path, if necessary.
- Install OWA with new application ID select this option to install OWA for multiple Archive servers in multiple locations. The unique identifier ensures that the Archive servers can reliably detect the OWA extension in different locations.
- 8. Click Next. The Summary window opens.



9. Click **Publish**. The *Installation* window opens and the the upgrade progress is displayed. When the upgrade completes, the *Maintenance Complete* window opens.

Archive Manager for Exchange OWA Extension	
	Update Complete
	The InstallShield Wizard has updated Archive Manager for Exchange OWA Extension to version Y.Y.O.O. To continue, click Next.
	< Back Finish Cancel

10. Click **Finish** to close the configuration setup wizard.

PST Importer and Gatherer

In this topic:

- Upgrading PST importer
- Upgrading PST Gatherer

Steps to upgrade PST importer

PST Importer is installed by default when you install Metalogix Archive Manager for Exchange. If it has not been installed, see the *Metalogix Archive Manager for Exchange Advanced Installation Guide*. Look for the topic *Install the Archive Server* in the *Advanced Installation* section.

When installing the Metalogix Archive Manager for Exchange you will be prompted to select the individual features. In the *Select Features* window, select the **PST Importer** feature and proceed with the installation.

Archive Manager for Exchange Select Features Select the features setup will install.	×
Select the features you want to install, and deselect t	he features you do not want to install. Description PST Importer imports and archives PST files.
InstallShield	ack <u>N</u> ext > Cancel

Steps to upgrade PST Gatherer

1. Run the installer. The default location is C:\Metalogix\Archive Manager Installation Package\Exchange\PST Gatherer\Archive Manager PST Gatherer Setup.exe

😹 Archive Manager PST Gatherer - InstallShield Wizard		Х
ح	Welcome to the InstallShield Wizard for Archive Manager PST Gatherer	
	The InstallShield(R) Wizard will install Archive Manager PST Gatherer on your computer. To continue, dick Next.	
	WARNING: This program is protected by copyright law and international treaties.	
	< <u>B</u> ack <u>N</u> ext > Cancel	

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

🛃 Archive Manager PST Gatherer - InstallShiel	d Wizard		×
Ready to Install the Program The wizard is ready to begin installation.			と
Click Install to begin the installation.			
If you want to review or change any of your in exit the wizard.	stallation settings,	click Back. Clic	k Cancel to
InstallShield			
<	Back Ir	nstall	Cancel

3. Click Install. When the install completes, the *InstallShield Wizard Complete* window opens.

🕼 Archive Manager PST Gatherer - InstallShield Wizard		Х
ی	InstallShield Wizard Completed	
	The InstallShield Wizard has successfully installed Archive Manager PST Gatherer. Click Finish to exit the wizard.	
	Show the Windows Installer log	
	< <u>B</u> ack <u>E</u>inish Cancel	

4. Click **Finish** to complete the upgrade.

Search

You can automatically upgrade search using the Archive Manager installer. If you need to manually upgrade the search or post processing services, follow the steps described below.

In this chapter:

- <u>Steps to manually upgrade with the Search installer</u>
- <u>Steps to manually upgrade the Search database</u>

Steps to manually upgrade with the Search installer

- Run the Archive Manager Search installer. the default location is C:\Archive Manager Installation Package\Archive Manager Search\Archive Manager Search Setup.exe. The Welcome window opens.
 - **NOTE**: A prerequisite check occurs and missing requirements if any are displayed. Install the prerequisites.

Archive Manager Search		×
	Welcome to the InstallShield Wizard for Archive Manager Search	
	The InstallShield Wizard will update the installed version (X.X.0.0) of Archive Manager Search to version Y.Y.0.0. To continue, click Next.	
	< Back Next > Cancel	

2. Click Next. The Logon Information window opens.

ın. User ac	ccounts mi	ust be in the form	at
on. User ac	counts m	ust be in the form.	at
on. User ac	ccounts mu	ust be in the form	at
Pack	Novt N	Capital	
_	< <u>B</u> ack	< <u>B</u> ack <u>N</u> ext >	K Back Next > Cance

 Click Next. The *Firewall Settings* window opens. Select the check box to allow communications through server firewalls. By default, the Allow programs to communicate through Windows *Firewall* is checked. This will allow critical services to communicate with the SMTP service. If you clear the check box, critical services may not be able to communicate through the firewall.



4. Click Next. The Ready to modify the program window opens.



5. Click **Update** to upgrade Search. If you want to review or change the wizard settings, click the **Back** button. To exit the wizard click **Cancel**. When the upgrade completes the *Update Complete* window opens.



6. Click Finish.

Steps to manually upgrade the Search database

If you choose this manual process and database scripts are upgraded, you must run the scripts manually from the *Archive Manager Configuration Tool* for two components: **Search** and **Post Processing**.

For Search

- 1. From the feature panel on the left in the *Archive Manager Configuration Tool*, click **Search** and select the **Database** tab.
- 2. Verify that the database connection information is as expected. Then click **Run Scripts**. The *Run Scripts* selection window opens.
- 3. Click **Select All** to select all check boxes. Click **Next**. The *View SQL scripts* window opens.
- 4. Click **Next**. The *Run Scripts* authentication window opens. Enter the information as described below:
 - a. Authentication authentication type used for the database. Choose either Windows authentication or SQL Server authentication
 - a. **Database user** database login username if *SQL Server authentication* is the selected as the authentication mode.
 - b. **Password** password of the database user if *SQL Server authentication* is the selected as the authentication mode.
 - c. (optional) Check the I want to review the SQL Scripts check box to view the scripts.
- 5. Click **Next**. If you chose to view the SQL scripts then the *View SQL scripts* window opens. If you chose to view the Oracle scripts then the *View Oracle scripts* window opens

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

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

Search

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

For Post Processing

- 1. From the feature panel on the left in the *Archive Manager Configuration Tool*, click **Post Processing** and select the **Database** tab.
- 2. Repeat steps 2 to 7 as described in the previous section.

SMTP

Steps to upgrade

Run the installer. The default location is C:\Metalogix\Archive Manager Installation
Package\SMTP\Archive Manager SMTP Setup.exe. The Welcome page of the Archive
Manager SMTP Service opens.

Archive Manager SMTP Service		>
	Welcome to the InstallShield Wizard for Archive Manager SMTP Service	
	The InstallShield Wizard will update the installed version (X.X.0.0) of Archive Manager SMTP Service to version Y.Y.0.0. To continue, dick Next.	
	< Back Next > Cancel	

2. Click **Next**. The *Logon Information* window opens. Enter the account details of a user who is authorized to run the SMTP service. It is recommended to use the account information of the super-user that was used to install Archive Manager for Exchange.

ogon Information	
Specify a user account and pas	isword.
Specify the user account to be DOMAIN(Username.	used by this application. User accounts must be in the format
Username:	
democorp\domadmin	
Password:	
Password: Confirm password:	
Password: Cogfirm password:	
Password: Confirm password: allShield	

3. Click **Next**. The **Firewall Settings** window opens if the Windows Firewall is active on your computer. By default, the **Allow programs to communicate through Windows Firewall** is checked. This will allow critical services to communicate with the SMTP service. If you clear the check box, critical services may not be able to communicate through the firewall.

Archive Manager SMTP Service			×
Firewall Settings			
Allow programs to communicate thro	ugh Windows Firewall		
InstallShield	< <u>B</u> ack	<u>N</u> ext >	Cancel

4. Click **Next**. The *Ready to update the program* window opens.

Archive Manager SMTP Service	×
Ready to update the program	
The wizard is ready to begin update process.	
Click Update to begin update process	
If you want to review or change any of your so wizard.	attings, click Back. Click Cancel to exit the
InstallShield	
	< Back Update Cancel

5. Click **Update** to begin the upgrade. If you want to review or change the wizard settings, click the **Back** button. To exit the wizard click **Cancel**. When the upgrade completes the *Update Complete* window opens.

Archive Manager SMTP Servic	e
	Update Complete
	The InstallShield Wizard has updated Archive Manager SMTP Service to version Y.Y.0.0.
	< Back Finish Cancel

6. Click Finish

For more information about SMTP, see the SMTP Guide.

Universal Access

Steps to upgrade

Run the installer. The default location is C:\Metalogix\Archive Manager Installation
Package\Universal Access\Archive Manager Universal Access Setup.exe. The
Welcome page of the Archive Manager Universal Access opens.

Archive Manager Universal Access		×
	Welcome to the InstallShield Wizard for Archive Manager Universal Access	
	The InstallShield Wizard will update the installed version (X.X.0.0) of Archive Manager Universal Access to version Y.Y.0.0. To continue, dick Next.	
	< Back Next > Cancel	

1. Click **Next**. The *Logon Information* window opens. Enter the account details of a user who is authorized to run the Archive Manager Universal Access. It is recommended to use the account information of the super-user that was used to install Archive Manager for Exchange.

Archive Manager Universal Access	×
Logon Information Specify a user account and password.	
Specify the user account to be used by the DOMAIN(Username.	s application. User accounts must be in the format
Username:	
Password:	
Co <u>n</u> firm password:	
(nstallShield	< <u>B</u> ack <u>N</u> ext > Cancel

2. Click **Next**. The **Firewall Settings** window opens if the Windows Firewall is active on your computer. By default, the **Allow programs to communicate through Windows Firewall** is checked. This will allow critical services to communicate with the Archive Manager Universal Access. If you clear the check box, critical services may not be able to communicate through the firewall.

Archive Manager Universal Access			×
Firewall Settings			
Allow programs to communicate through Win	dows Firewall		
InstallShield			
	< <u>B</u> ack	<u>N</u> ext >	Cancel

3. Click Next. The *Ready to Install the program* window opens.

Archive Manager Universal Access	×
Ready to update the program The wizard is ready to begin update process.	
Click Update to begin update process	
If you want to review or change any of your settings, click Back. Click Cancel to wizard.) exit the
InstallShield	Cancel

4. Click Update to begin the upgrade. If you want to review or change the wizard settings, click the Back button. To exit the wizard click Cancel. When the upgrade completes the Update *Complete* window opens.

Archive Manager Universal Acc	cess
	Update Complete
	The InstallShield Wizard has updated Archive Manager Universal Access to version Y.Y.0.0. To continue, dick Next.
	< <u>B</u> ack Finish Cancel

5. Click **Finish**.

For more information about Universal Access configuration see the Universal Access Guide.

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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