Metalogix® Archive Manager for Exchange 8.8

Quick Start Guide

Metalogix® Archive Manager for Exchange
Updated August 2023
Version 8.8

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Introduction

Metalogix Archive Manager for Exchange provides the most flexible and effective way to archive, manage and secure all you organization's email from one central location. You can control the retention policy of archived emails by moving emails to less costly locations as their relevance changes and keep the option of deleting old messages unless they are on legal hold. With robust version control, any previous version of an archived email can be restored at any time along with its attachments.

Metalogix Archive Manager for Exchange also offers mobile and offline email access to users on the road.

The *primary* components of Metalogix Archive Manager for Exchange are as follows:

- **Archive Manager for Exchange** - email archiving engine that includes the windows services and the Archive Manager for Exchange Administration Center (AMAC).

- **Hierarchical Storage Manager (HSM)** - a data storage system for managing your email archive store as well as all company data on one or more file-servers. HSM ensures that files with identical content are stored only once regardless of where the original file is located.

Metalogix Archive Manager for Exchange can be extended with *optional* components to enhance its capabilities. The following optional components are installed with the Express installation.

- **Archive Manager Search** - full text search engine capable of searching archived emails.

- **ArchiveWeb** - online archive interface with advanced search and reporting functionality.

Metalogix Archive Manager for Exchange can be extended with additional *optional* components. The following optional components must be installed separately.

- **Archive Manager for Exchange OWA Extension** - component that is installed on the Microsoft Exchange Server to provide Outlook Web Access to end-users.

- **Archive Manager Universal Access** - allows mobile users, Mac users and Linux users to work with archived emails.

- **Archive Manager SMTP Service** - allows processing of messages from an external email server (O365, Gmail, Exchange, etc.) into Metalogix Archive Manager for Exchange.

- **Metalogix Forms Publisher** - ensures that custom Outlook forms are used to display archived messages.

- **Metalogix Archive Manager Outlook Addin** - gives authorized users the ability to control certain archive functions by themselves.

- **Archive Manager PST Gatherer Setup** - automated extension to PST importer

This quick-start guide describes the express installation that installs the primary components of Metalogix Archive Manager for Exchange on a single computer. You can add additional components as required.

Metalogix Archive Manager is a highly scalable product that can be installed into a more complex environment than described within this guide. To secure load balancing and facilitate multiple archiving for large organizations, Metalogix Archive Manager provides you with the ability to configure several Archive Manager servers. For more information about advanced installation in distributed environments please refer to the *Advanced Install Guide for Archive Manager for Exchange.*

Email archive and retrieval process

When emails are archived, Metalogix Archive Manager for Exchange uses shortcuts to replace archived emails in the on-premise or online Microsoft Exchange mailboxes. Email shortcuts require very little space, reducing your email storage by up to 80% and email backup time by 50%. Messages remain available to end-users who can work with them as usual. This helps your end-users access all their data while reducing the need to set mailbox quotas and removing the dependency on PST files.

When a user clicks a shortcut to an archived email, Archive Manager for Exchange passes the information from the shortcut to HSM which restores the email from the store.

HSM uses the Single-instance storage (SIS) service that takes multiple copies of the content and replaces them with a single shared copy. It allows version control, eliminates data duplication, and increases storage and retrieval efficiency.

Deployment Plan

Planning the deployment of the Metalogix Archive Manager for Exchange depends on the messaging load and messaging server topologies in your organization. The quick start guide describes the deployment for lightweight usage scenarios that are based on the following assumptions:

- You have acquired a trial license for Metalogix Archive Manager for Exchange and you want to evaluate the product in a test environment.

- Your organization uses a single Microsoft Exchange server with less than 1000 mailboxes.

The following illustration describes the way in which the constituent parts are interrelated and arranged for a typical lightweight deployment.
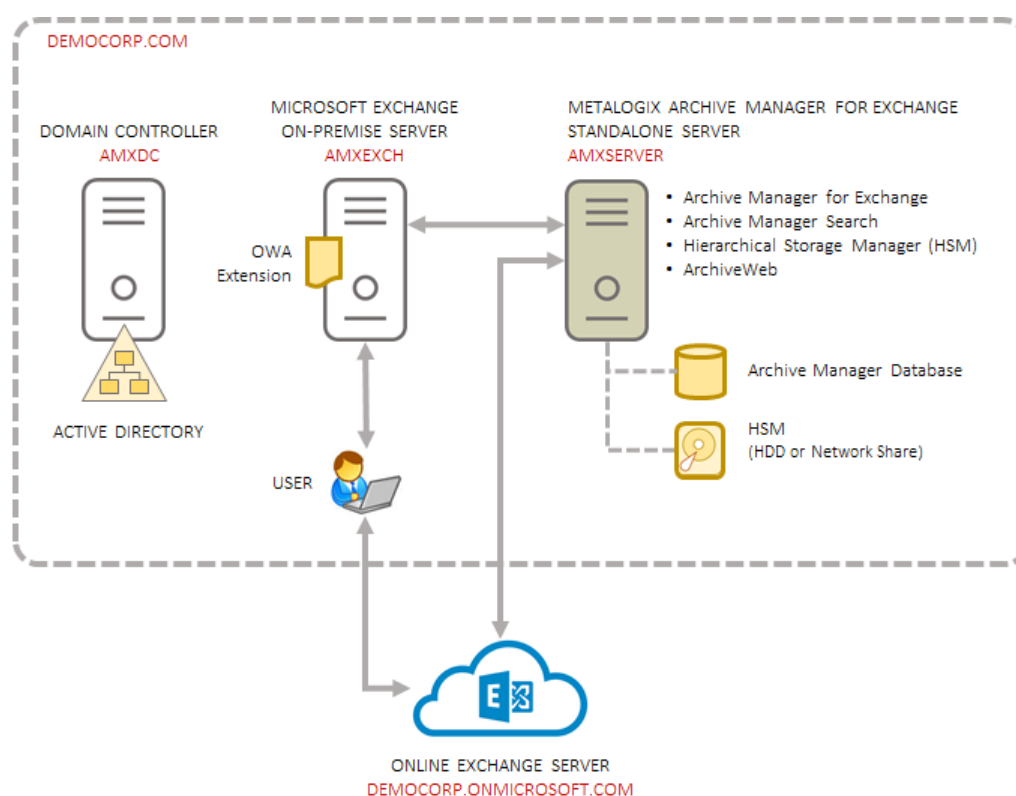
Figure 1. Topology for a standalone Metalogix Archive Manager for Exchange deployment

In this deployment topology, a single on-premise Microsoft Exchange server with less than 1000 mailboxes is present in a domain. The Metalogix Archive Manager for Exchange is installed on a standalone server and interacts with the Microsoft Exchange server to archive messages that arrive in the mailboxes and retrieve archived messages when requested. If an online Microsoft Exchange server is present with a dedicated or integrated active directory, the standalone

Metalogix Archive Manager for Exchange server interacts with the online server to provide the same services for the online mailboxes as well.

Users who interact with the on-premise or online Microsoft Exchange servers can easily retrieve archived emails from shortcuts that are displayed in their on-premise or online Outlook clients.

When you choose the Express installation option for the lightweight deployment, Metalogix Archive Manager for Exchange is installed on the standalone server with the full set of primary components: Archive Manager for Exchange, Archive Manager Search, Hierarchical Storage Manager (HSM) and ArchiveWeb. The server also contains the Archive Manager Database instance that contains the configuration databases for various features and components. If you do not have a dedicated file store, HSM uses the local hard drive for storing archived messages.

You can install additional components as required. For example, the *Archive Manager for OWA Extension* is installed on the Microsoft Exchange server to provide Outlook Web Access to end-users.

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System Requirements

The requirements described below are applicable for installing the Metalogix Archive Manager for Exchange application components, and are compatible with the following Microsoft Exchange servers:

- Microsoft Exchange Server 2016

- Microsoft Exchange Server 2019

- Microsoft 365 (Exchange Online)

i | **NOTE:** System requirements for optional components of the Metalogix Archive Manager for Exchange are described in the corresponding document for each optional component. **You may have to exclude users of Archive Manager for Exchange from modern authentication policies, in on-premise environments with Exchange 2019 CU13 and later. Contact Quest [Technical Support Resources](#) for more information.**

Hardware

Component	Minimum specification	Recommended specification
Number of Processor Cores	4	8
Main Memory	4 GB	12 GB
Hard Disk	10 GB	10 GB

i | **NOTE:** The application, log files and cache folders require 10 GB of HDD space. If the Archive Manager for Exchange server includes the database, and is used as a local storage for archived messages as well, then the the Hard Disk size must be revised upwards to add more space for the database and the file store.

Operating System

- Windows Server 2016

- Windows Server 2019

- Windows Server 2022

i | **NOTE:** Latest updates and service packs for servers are recommended.

Windows Server Roles

- Web Server (IIS)

  o Web Server > Common HTTP Features > HTTP Redirection

  o Web Server > Performance > Dynamic Content Compression

  o Web Server > Security > Basic Authentication

  o Web Server > Security > Windows Authentication

  o Web Server > Application Development

    ▪ .NET Extensibility 4.5 or later

    ▪ ASP.NET 4.5 or later

  o Management Tools > IIS 6 Management Console

  o Management Tools > IIS 6 Management Compatibility > IIS 6 Metabase Compatibility

  o Management Tools > Management Service

Windows Features

- Remote Server Administration Tools

  o Role Administration Tools > AD DS and AD LDS Tool > Active Directory module for Windows PowerShell

  i | **NOTE:** Ensure that PowerShell can communicate between the Archive Manager server and the Exchange server and between the Archive Manager server and the domain controller

- .NET Framework 4.8 Features / .NET Framework 4.8

- .NET Framework 4.8 Features / ASP.NET 4.8

- .NET Framework 4.8 Features / WCF Services (all checkboxes under this item)

Redistributable packages

- Microsoft Visual C++ 2013 Redistributable Package (x64)

- Microsoft Visual C++ 2015-2022 Redistributable Package (x64)

- Microsoft Visual C++ 2015-2022 Redistributable Package (x86)

.NET 4.8

Download and install .NET Framework 4.8 from the following link:

https://dotnet.microsoft.com/en-us/download/dotnet-framework/thank-you/net48-web-installer

Microsoft Outlook

The table below identifies the mail clients that are supported for use together with each version of Exchange. Supported clients are identified by a check mark (✓)

Client	Exchange 2019	Exchange 2016
Microsoft 365	✓	✓
Outlook 2021 (32-bit)	✓	✓
Outlook 2019 (32-bit)	✓	✓
Outlook 2016 (32-bit)	✓ [1]	✓ [1]

i | **NOTE:** 1 - Supported with the latest Office service pack and public updates.

Database Servers and Drivers

- Microsoft SQL Server 2014 to Microsoft SQL Server 2022
  - o Microsoft OLE DB Driver 18 for SQL Server, or newer
- Azure SQL Database
- Oracle 12c to Oracle 19c
  - o Oracle client (x86 or x64)

Web Browsers

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

- Microsoft Edge current version
- Mozilla Firefox current version
- Chrome current version
- Opera current version

Additional Information

- Installation of Metalogix Archive Manager application components on a Microsoft Exchange Server or Domain Controller are not supported.

- The software installs web applications in the Default Web Site. This could cause conflict with other applications like Microsoft CRM or Microsoft SharePoint. To change the installation website, manual changes are required after the installation. Please contact Technical support in such cases.

- Metalogix Archive Manager for Exchange is fully supported in a virtualized environment.

Pre-installation Tasks

Before you begin installing Metalogix Archive Manager for Exchange, your environment must be configured to ensure a successful installation and usage experience of the Metalogix Archive Manager for Exchange.

- Setup a Superuser account

- Create a public folder mailbox and public folder on the Microsoft Exchange server

- Install Microsoft Outlook

- Download the install media

Setup a Superuser account

A s*uperuser* account is a windows account with administrator privileges to work with Metalogix Archive Manager for Exchange administration tools, run services, manage databases, manage extensions. It also has elevated privileges to interact with the on-premise or online Microsoft Exchange servers. For the Express installation we will use the *Enterprise Administrator* as the *Superuser*.

> **i** | **NOTE:** To ensure a quick deployment, we recommend that all constituent servers and software be installed by the *Enterprise Administrator* to skip advanced concepts about access permissions with other user types. In this deployment topology, the Microsoft Exchange administrator is also assumed to be the *Enterprise Administrator.* Verify that a mailbox for the Superuser (*Enterprise Administrator*) exists on the Microsoft Exchange server.

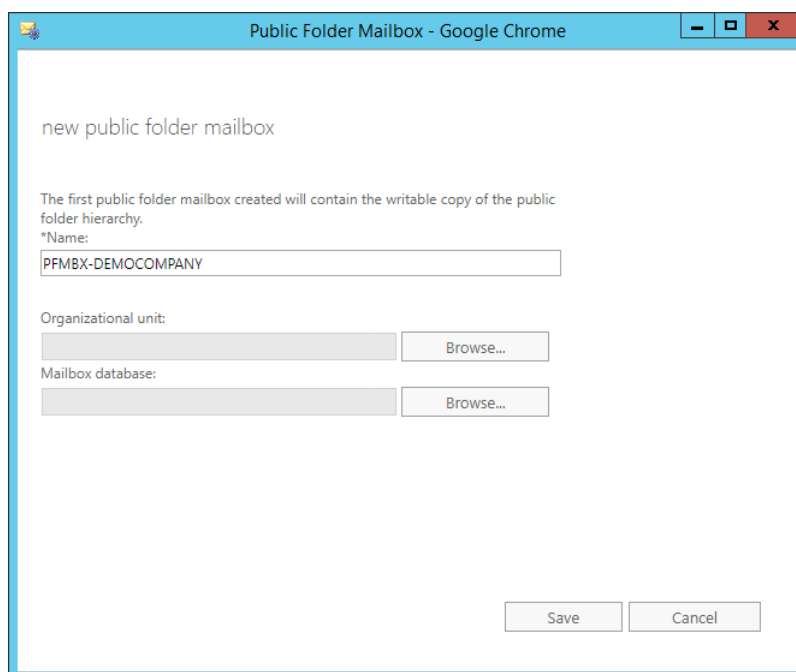The *Superuser* must be granted the following memberships/privileges on the Metalogix Archive Manager server:

1. Must be a member of the local *Administrators* group.

2. Must be granted log in rights to the Archive Manager database instance with the *sysadmin* role.

3. Must be granted remote desktop access if necessary. For more information see Steps to grant Remote Desktop Access.

Create a public folder mailbox and public folder on the Microsoft Exchange server

You can skip this step if your on-premise Microsoft Exchange server has an Organization Forms library which requires a public folder mailbox and a public folder.

Steps to create a public folder mailbox

1. Log in to the Exchange Admin Center (EAC).

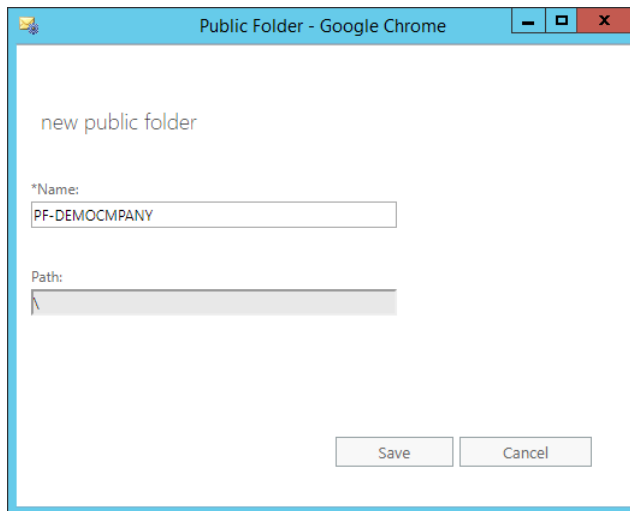2. Navigate to **Public folders** > **Public folder mailboxes**, and then click the **+** icon.

3. In the *Public Folder Mailbox* window, provide a name for the public folder mailbox.

4. Click **Save**.

Steps to create a public folder mailbox

1. Log in to the Exchange Admin Center (EAC).

2. Navigate to **Public folders** > **Public folders**.

3. Click the **+** icon.

4. In *Public Folder* window, type the name of the public folder. Do not use a backslash (\ ) in the name when creating a public folder.

5. In the **Path** box, verify the path to the public folder is a backslash (\)

6. Click **Save**.

Install Microsoft Outlook

The Metalogix Archive Manager Server communicates with Microsoft Exchange on-premise servers via MAPI or EWS and Microsoft Exchange online via EWS. To provide your Archive Manager server with MAPI, install any of the following versions of Outlook with full Unicode compatibility.

- Outlook 2022 (32 bit)

- Outlook 2019 (32 bit)

- Outlook 2016 (32 bit)

Steps to download the install media

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

   or

   navigate to the http://www.quest.com/trials 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.

Express Installation

Express installation installs Metalogix Archive Manager for Exchange on a standalone server with the full set of primary components: Archive Manager for Exchange, Archive Manager Search, Hierarchical Storage Manager (HSM) and ArchiveWeb. The server also contains the Archive Manager Database instance that contains the configuration databases for various features and components. If you do not have a dedicated file store, HSM uses the local hard drive for storing archived messages.

- [Worksheet for this installation](#)

- [Steps to install Metalogix Archive Manager for Exchange](#)

- [Steps to verify the Express installation](#)

Worksheet for this installation

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

| Item	Description	Example
License Key	The license key that you received from Quest. If you don't have a license key, contact your Quest representative.	894K5-3M448-M544E-A594A-7K8Z7 (Sample only. This key is neither an active nor an expired license key)
Archive manager for Exchange server	The server where the Archive Manager for Files will be installed.	AMXSERVER-X
Installation folder	Full path of the folder where the application files will be installed	C:\Program Files (x86) \Metalogix
HSM Store folder	Full path of the folder that will contain the archived files	C:\HSM
Database Authentication method	Type of database authentication: *Integrated*	Integrated Windows Authentication

	Windows Authentication or SQL Authentication	
UserLogin	Username if SQL Authentication is selected	democorp\domadmin
Password	Database password if SQL Authentication is selected	**************
Database server	The database serve instance name where the databases for Archive Manager for Files will be installed.	AMXSERVER-X
Superuser account	Windows account that runs the Archive Manager for Exchange services. For the Express installation steps described in this guide, the superuser account is the *Enterprise Administrator* account.	username: democorp\domadmin password: **************

Steps to install Metalogix Archive Manager for Exchange

1. Run the **Metalogix Archive Manager Installation Package** to extract the files to a local folder.

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

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

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

5. From the navigation panel on the left, click **INSTALLATION**. The *Server Installation* window opens. Read the **Software Transaction Agreement**. If you wish to proceed, select the **I accept the terms of the license agreement** check box.

6. Click **Next**. The *Installation Mode* window opens.
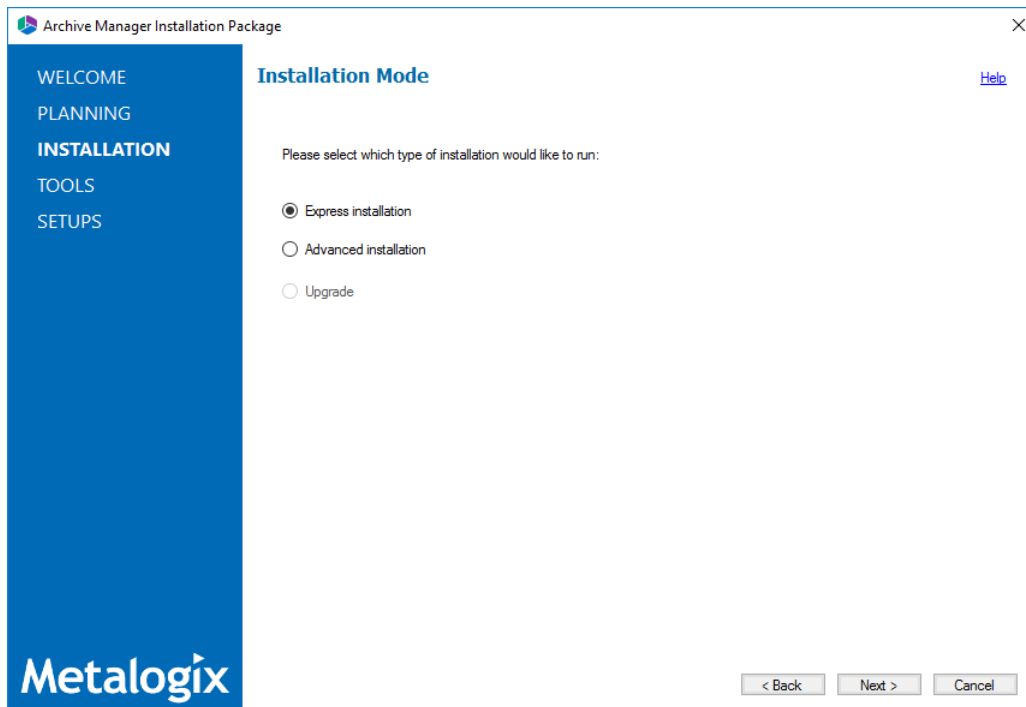
7. Select the **Express installation** option and click **Next**. The *Installation Components* window opens.
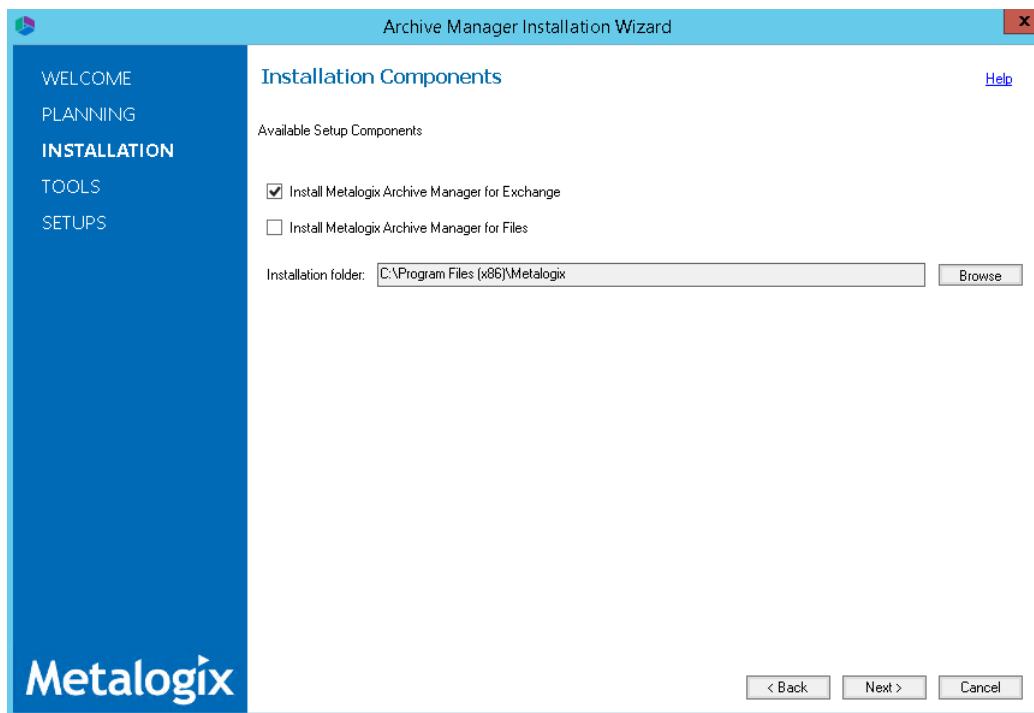

8. Select the **Install Metalogix Archive Manager for Exchange** check box. You can select **Install Metalogix Archive Manager for Files** check box as well if you want to install Metalogix Archive Manager for Files on the same server. For more information about express installation for Metalogix Archive Manager for Files, see the *Metalogix Archive Manager for Files Quick Start Guide*.

9. If you want to change the default installation folder, click **Browse** and select and existing folder.

10. Click **Next**. The *Database Engine* selection window opens.
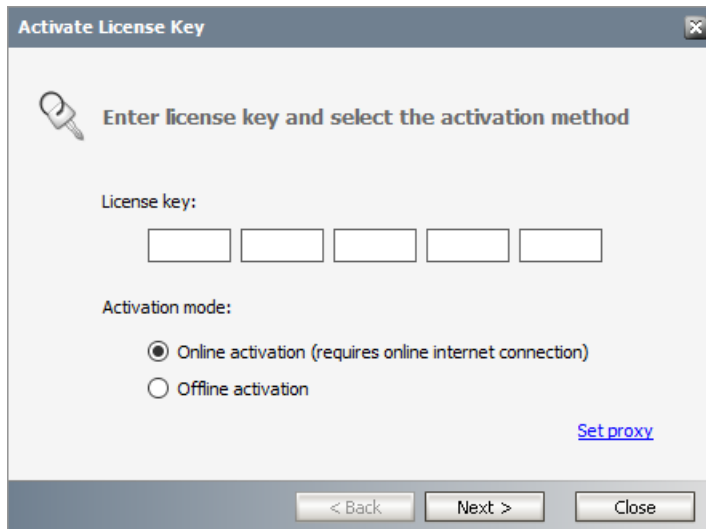
11. Select either **Microsoft SQL Server** (for on-premise MS SQL Database Server or Azure SQL Database) or **Oracle**.

12. Click **Next**. The *Checking Prerequisites* window opens.
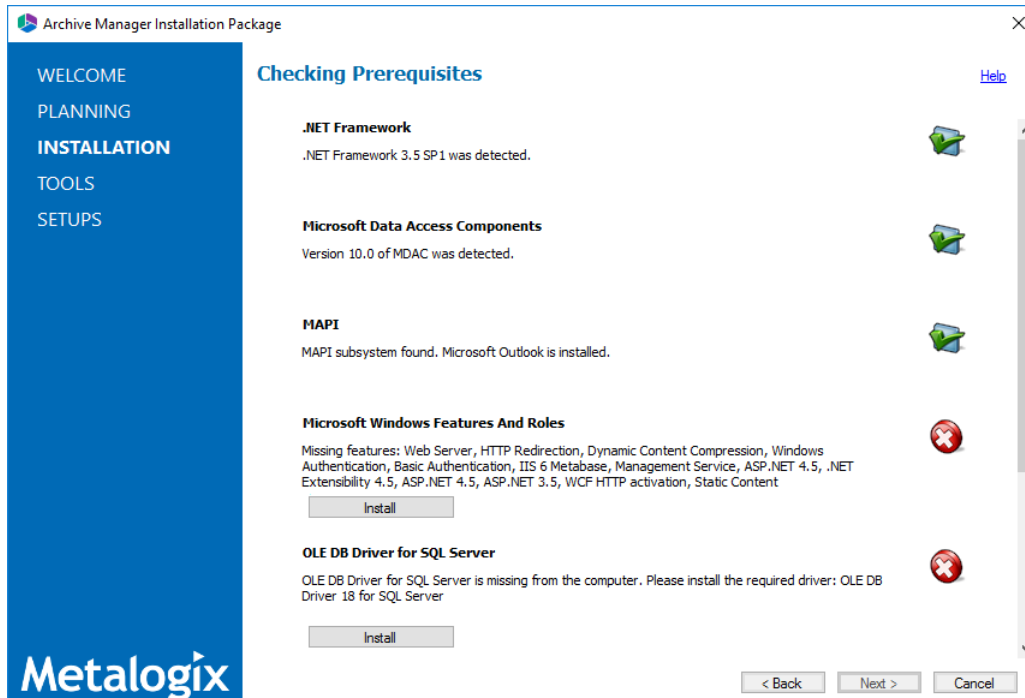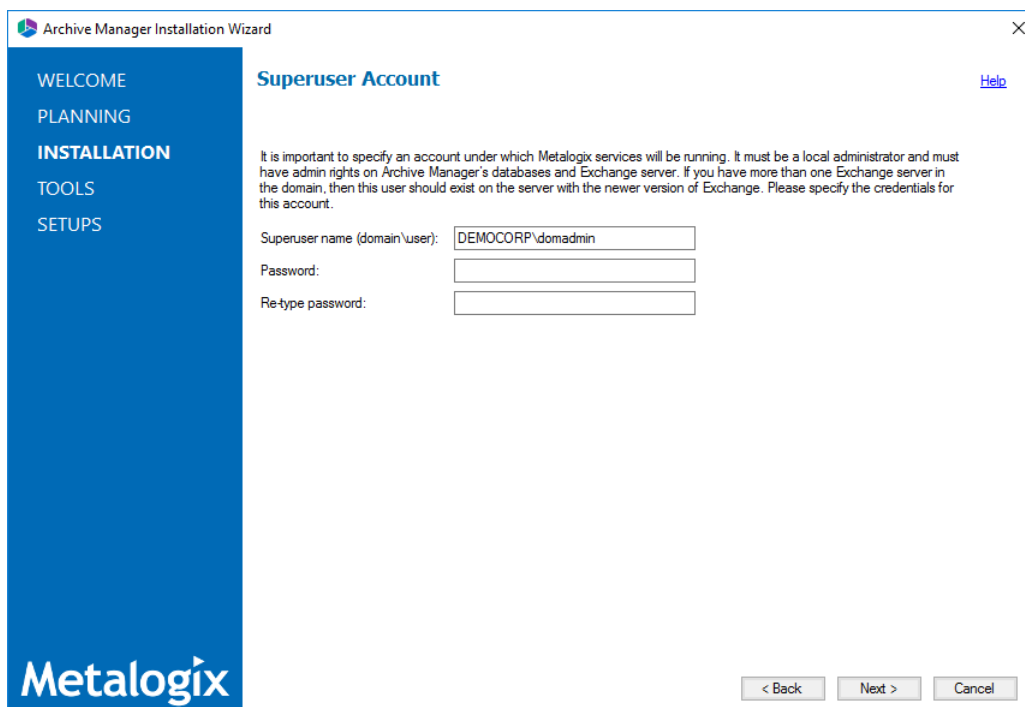
13. Notice that some prerequisites are missing and the **Next** button is deactivated. Click **Install** for each prerequisite to install the missing components. Scroll down to expose and install all the prerequisites.

14. Scroll down to the bottom of the window. Click **Validate your license**. The *Activate License Key* dialog appears. If you are connected to the internet, select **Online activation** or see [Appendix](#) for more license activation options.

15. Click **Next**. When your license is activated, you will see a confirmation message and the license details. Click **Finish** to close the **Activate License Key** dialog. This completes the prerequisite checks.

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

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

18. Click **Next**. The *Database Server Connection* window opens.

19. Specify the connection properties as explained below:

   a. **Authentication** - the type of database authentication. From the drop down, select either **Integrated Windows Authentication** or **SQL Authentication**.

   b. **Username** - username (if SQL Authentication is selected)

   c. **Password** - password of the user (if SQL Authentication is selected)

   d. **Server name** - name of the SQL Server. For example **AMXSERVER-X**

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

21. If you want to change the default folder, click **Browse** and select a location that has ample space to store archived files.

22. Click **Next**. The *Firewall Settings* window opens.
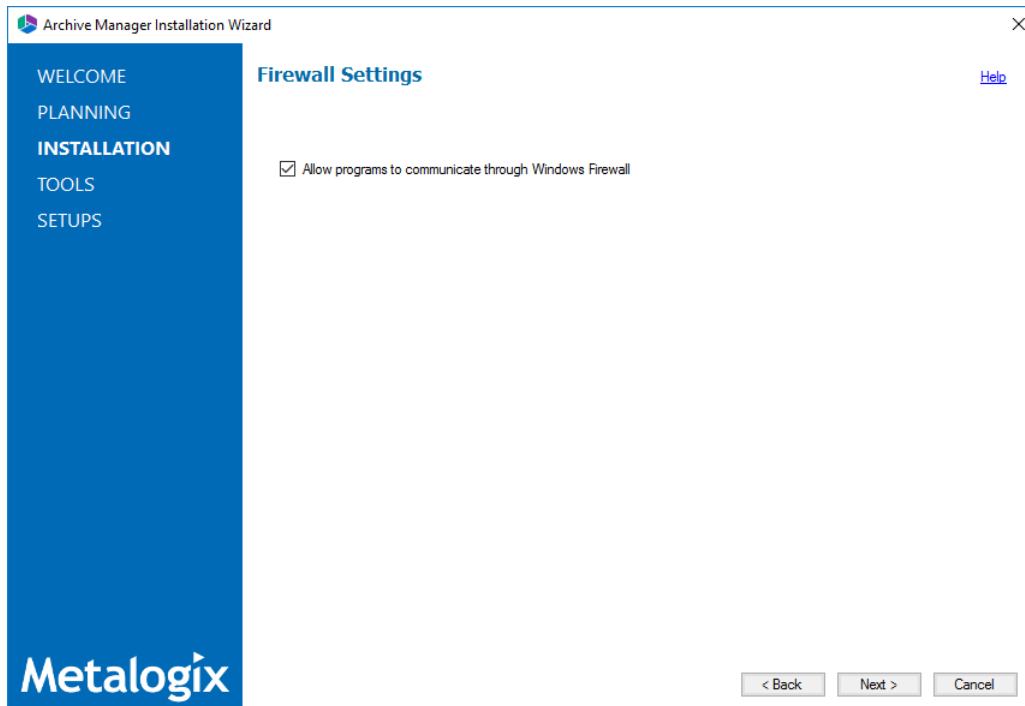
23. Select the **Allow programs to communicate through Windows Firewall** check box. Metalogix Archive Manager for Exchange components will be then able to communicate through the firewall.

24. Click **Next**. The *Summary Installation* window opens. The installation summary displays settings you have specified in previous steps. The versions indicated in the image below could be different.

    a. Select **Manage the Organizational Forms Library** if your organization uses this public folder to share email templates. Otherwise, clear the check box.

    b. Select the check box **Start Metalogix Archive Manager for Exchange** to open the Archive Manager for Exchange Administration Center (AMAC) when the installation completes.

25. Click **Install** to start the installation.
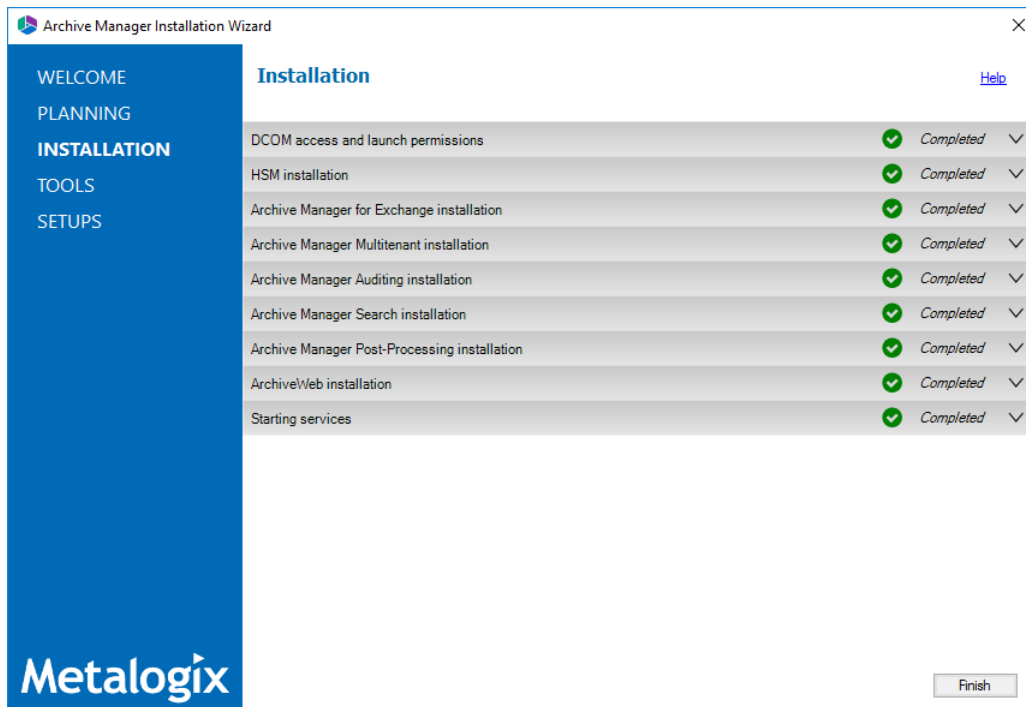
26. The installer proceeds to install all the components. If a component installer completes with a warning, expand the the row to view the warning(s).

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

Steps to verify the Express installation

The AMAC should open automatically if the check box **Start Metalogix Archive Manager for Exchange** was checked in the *Summary Installation* step of the installation wizard. To manually open the AMAC follow the steps described below:

1. Click **Ctrl + Esc** to display the list of windows programs.

2. Expand the *Metalogix* folder and click **Archive Manager for Exchange**.

3. The AMAC opens and the *Address Book Wizard* starts.

Address Book Setup

The Active Directory forest and domains store information about Microsoft Exchange servers, mailboxes, and other Microsoft Exchange-related objects in your organization. The *Address Book Setup* wizard helps you to import the Microsoft Exchange servers, mailboxes and groups into the *Address Book Manager* which keeps them in synch to facilitate email archiving.

When you complete the Express Installation, the AMAC opens and the *Address Book Setup* wizard starts.
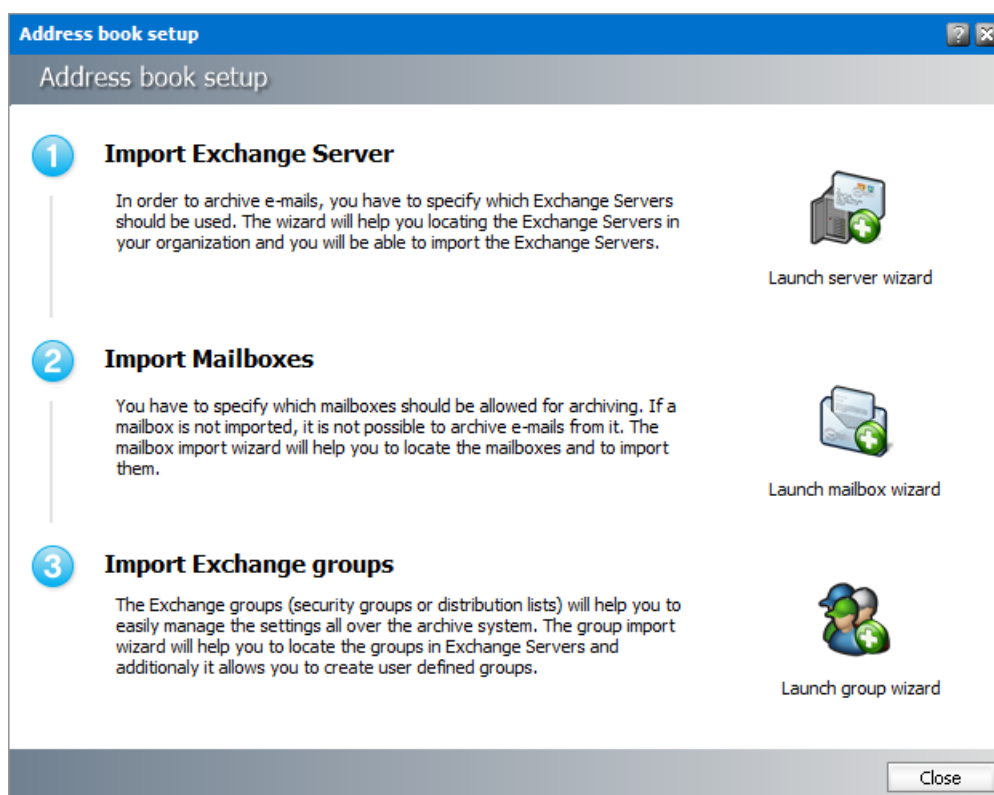
In this topic:

- [Options to start the Address Book Setup Wizard](#)

- Importing Exchange Servers

  o [Steps to import on-premise Microsoft Exchange Servers](#)

  o [Steps to import Microsoft Online](#)

- Importing Mailboxes

  i | **NOTE:** With the trial license you can import up to 5 mailboxes from a pre-existing or user-defined group.

  - [Steps to import mailboxes from an on-premise Microsoft Exchange Server](#)
  - [Steps to import mailboxes from Exchange Online](#)

- Importing Groups

  - [Steps to import groups from on-premise Microsoft Exchange servers](#)
  - [Steps to import groups from Exchange Online](#)
  - [Steps to create user-defined groups](#)

- Verifying Address Book setup

  - [Steps to verify the imported Microsoft Exchange servers](#)
  - [Steps to verify the imported mailboxes](#)
  - [Steps to verify the imported and user-defined groups](#)

Options to start the Address Book Setup Wizard

You can start the *Address Book Setup* wizard in two ways as described in the steps below:

1. From the **Tools** menu, click **Address Book Manager**.
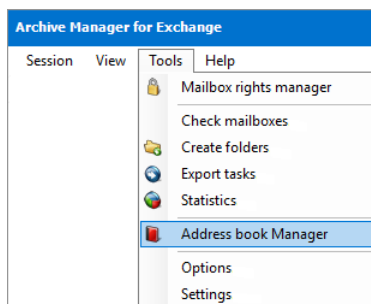
   or, click the **Address Book Manager** icon from the toolbar.
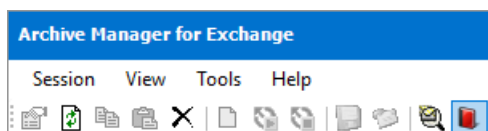
2. If Microsoft Exchange servers, mailboxes or groups are *not* available in the Address Book Manager, the *Address Book Setup* wizard starts automatically

   or

   If Microsoft Exchange servers, mailboxes or groups are available, the Address Book Manager window opens. From the **Setup** menu, click **Setup Wizard**. The *Address Book Setup* wizard starts.

Steps to import on-premise Microsoft Exchange servers

1. From the *Address Book Setup* wizard, click **Launch server wizard** to initiate the server import process.

2. From the *Select Exchange Server Type* window, select **Import Exchange Server**.

3. Click **Next**. A list of Microsoft Exchange Servers that are accessible within your trusted domain will appear.

   Select the servers that contain the mailboxes and folders you want to archive and then select the check boxes to set the permissions as described below:

   a. **Set Exchange server permissions for Metalogix service account** - grants elevated rights to the superuser on each of the selected Microsoft Exchange Servers.

   b. **Set Public Folder permissions for Metalogix service account** - grants OWNER permission to the Public folders.

4. Click **Next**. The *Superuser's mailbox SMTP address* window opens.

5. In the **Superuser's mailbox SMTP address** field, enter the email address of the superuser if not already filled in. You can change the email from the server **Properties** window**.**

6. Click **Next**. The **Summary** window opens that lists the on-premise servers that will be added.

7. Click **Finish** to start the import process. The *Creating objects* window opens. You can click **Back** to select more servers to add or remove some of the selected servers.

8. When the import process has completed, click **Close**.

Steps to import Microsoft Online

1. From the *Address Book Setup* wizard, click the **Launch server wizard** to initiate the server import process.

2. In the *Select Exchange Server Type* window, select **Import Exchange Online**.

   Use Azure AD application - select his option to enable Metalogix Archive Manager for Exchange to access Exchange Online with the Exchange Web Services (EWS) protocol. You must register your application in Azure Active Directory. For more details, see Registering Metalogix in Azure AD for EWS.
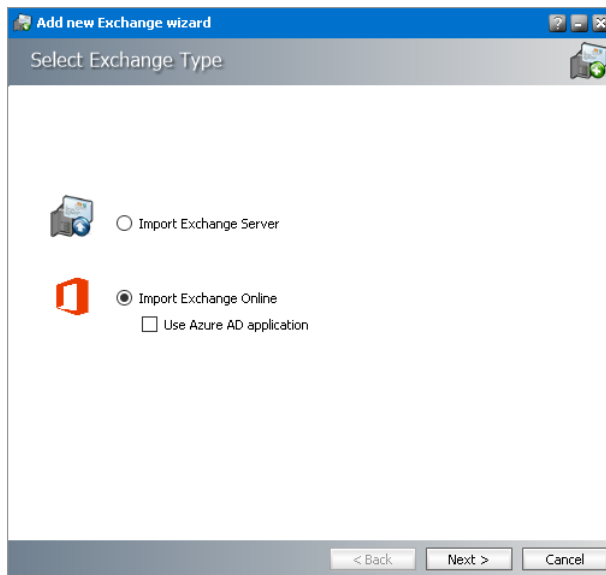
3. Click **Next**. The *Credentials for Exchange Online* window opens. Specify the information as described below:

   a. **Username** - username of the administrator.

   b. **Password** - password of the administrator.

   c. **Endpoint type** - select from the following options:

      • **Worldwide endpoints** - endpoints for worldwide Microsoft 365 subscriptions, which include the United States Government Community Cloud (GCC).

      • **U.S. Government DoD endpoints** - endpoints for United States Department of Defense (DoD) subscriptions.

      • **U.S. Government GCC High endpoints** - endpoints for United States Government Community Cloud High (GCC High) subscriptions.

   If you selected from the previous step, you must specify the following information

   a. **Client ID** - the Application (client) ID that you copied from Azure.

   b. **Client secret** - the Secret ID that you copied from Azure.

   c. **Endpoint type** - described above.

4. Click **Next**. The *Available Exchange Servers* window opens. Select the Office 365 instance. You can click **Back** to select more servers to add or remove some of the selected servers.

5. Set the permission as described below:

   • **Set Public Folder permissions for *<Exchange server online superuser>*** - grants OWNER permission for the Public folders to the Exchange serve online *superuser*.

6. Click **Next**. The *Summary* window opens that lists the online Microsoft Exchange servers that will be added.

7. Click **Finish** to start the import process. The *Creating object* window opens.

8. When the import process has completed, click **Close**.

Steps to import mailboxes from an on-premise Microsoft Exchange Server

1. From the *Address Book Setup* wizard, click the **Launch mailbox wizard** to initiate the mailbox import process.

2. From the *Exchange type selection* window, select **Import from Exchange On-Premise**.

3. Click **Next**. The *Mailboxes - search and select mailboxes to import* window opens.

4. Click **Search** to return the list of all mailboxes across all on-premise servers available to the Address Book Manager. To reduce the list of mailboxes, you can specify a search term in the **Look for Name** search box. Only the initial letters of the mailbox *Display Name* can be specified, and wildcards are not supported. The search term is case-insensitive. For example, if you enter *ni* as the search term and click **Search**, the mailboxes that start with the letters *ni* will be returned in the search results list.

5. Select one or more mailboxes that you want to import.

   > **i** | **NOTE:** Mailboxes that are highlighted indicate that they already exist in the Address Book Manager. The list summary above the list of mailboxes will indicate how many mailboxes that you select are new, and how many already exist. If you select preexisting mailboxes, they will be updated during the import process.

6. Click **Next**. The *Summary* window opens that lists the mailboxes from the on-premise Microsoft Exchange servers that will be imported.

7. Click **Finish** to start the import process. The *Creating Object* window opens. You can click **Back** to select more mailboxes to add or remove some of the selected mailboxes.

8. When the import process has completed, click **Close**.

Steps to import mailboxes from Exchange Online

1. From the *Address Book Setup* wizard, click the **Launch mailbox wizard** to initiate the mailbox import process.

2. From the *Exchange type selection* window, select **Import from Exchange Online**.

3. Click **Next**. The *Exchange Online* window opens. Select the desired Office 365 instance.

4. Click **Next**. The *Mailboxes - search and select mailboxes to import* window opens.

5. Click **Search** to return the list of all mailboxes across all on-premise servers available to the Address Book Manager. To reduce the list of mailboxes, you can specify a search term in the **Look for Name** search box. Only the initial letters of the mailbox *Display Name* can be specified, and wildcards are not supported. The search term is case-insensitive. For example, if you enter *A* as the search term and click **Search**, the mailboxes *that start with the letter A* will be returned in the search results list.

6. Select one or more mailboxes that you want to import.

   > **i** | **NOTE:** Mailboxes that are highlighted indicate that they already exist in the Address Book Manager. The list summary above the list of mailboxes will indicate how many mailboxes that you select are new, and how many already exist. If you select preexisting mailboxes, they will be updated during the import process.

7. Click **Next**. The **Summary** window opens that lists the online Microsoft Exchange servers that will be added.

8. Click **Finish** to start the import process. The *Creating Object* window opens. You can click **Back** to select more mailboxes to add or remove some of the selected mailboxes.

9. When the import process has completed, click **Close**.

Steps to import groups from an on-premise Microsoft Exchange Server

1. From the *Address Book Setup* wizard, click the **Launch group wizard** to initiate the group import process.

2. From the *Wizard type selection* window, select **Import Groups**.

3. Click **Next**. The *Exchange type selection* window opens. Select **Import form Exchange On-Premise**.

4. Click **Next**. The *Groups - search and select groups to import* window opens.

5. Click **Search** to return the list of all groups across all on-premise servers available to the Address Book Manager. To reduce the list of groups, you can specify a search term in the **Look for Name** search box. Only the initial letters of the groups **Display Name** can be specified, and wildcards are not supported. The search term is case-insensitive. For example, if you enter **D**

as the search term and click **Search**, the groups that start with the letter **D** will be returned in the search results list.

6. Select one or more groups that you want to import.

   ℹ **NOTE:** Groups that are highlighted indicate that they already exist in the Address Book Manager. The list summary above the list of groups will indicate how many groups that you select are new, and how many already exist. If you select preexisting groups, all new mailboxes will also be imported.

7. Click **Next**. The *Group settings - default values* window opens. Specify the settings which will be applied when the groups are imported now or synchronized in future with the Address Book Manager automatically or manually. The settings are described below:

   a. **Automatically import mailbox members** - check this box to import all Active Directory accounts with a mailbox that are members of this group.

   b. **Advanced import settings** - check this box if you intend to import subgroups and subgroup mailbox members. You can activate this setting only if you select the **Automatically import mailbox members** setting.

   c. **Import subgroups along with members** - check this box to import existing subgroups of selected groups including its member mailboxes. This is the default setting.

   d. **Import only mailbox members without subgroups** - check this box to import only member mailboxes from subgroups. These mailboxes will be added to mailboxes in the parent group in the Address Book Manager.

8. Click **Next**. The *Summary* window opens that lists the groups that will be added.

9. Click **Finish** to start the import process. The *Creating Object* window opens.

10. When the import process has completed, click **Close**.

Steps to import groups from Exchange Online

1. From the *Address Book Setup* wizard, click the **Launch group wizard** to initiate the group import process.

2. From the *Wizard type selection* window, select **Import Groups**.

3. Click **Next**. In the *Exchange Type selection* window, select **Import from Exchange Online**.

4. Click **Next**. The *Exchange Online* window opens. Select the desired online Microsoft Exchange server.

5. Click **Next**. The *Groups - search and select groups to import* window opens.

6. Click **Search** to return the list of all groups across all online servers available to the Address Book Manager. To reduce the list of groups, you can specify a search term in the **Look for Name** search box. Only the initial letters of the group **Display Name** can be specified and wildcards are not supported. The search term is case-insensitive.

NOTE: Groups that are highlighted indicate that they already exist in the Address Book Manager. The list summary above the list of groups will indicate how many groups that you select are new, and how many already exist. If you select pre-existing groups, all new mailboxes in those groups will also be imported.

7. Select the groups that you want to import.

8. Click **Next**. The *Group settings - default values* window opens. Specify the settings which will be applied when the groups are imported now or synchronized in future with the Address Book Manager automatically or manually. The settings are described below:

    a. **Automatically import mailbox members** - check this box to import all Active Directory accounts with a mailbox that are members of this group.

    b. **Advanced import settings** - check this box if you intend to import subgroups and subgroup mailbox members. You can activate this setting only if you select the **Automatically import mailbox members** setting.

    c. **Import subgroups along with members** - check this box to import existing subgroups of selected groups including its member mailboxes. This is the default setting.

    d. **Import only mailbox members without subgroups** - check this box to import only member mailboxes from subgroups. These mailboxes will be added to mailboxes in the parent group in the Address Book Manager.

9. Click **Next**. The *Summary* window opens that lists the groups that will be added.

10. Click **Finish** to start the import process. The *Creating objects* window opens. You can click **Back** to select more groups to add or remove some of the selected groups.

11. When the import process has completed, click **Close**.

Steps to create user-defined groups

1. In the Import group wizard window, select **Create user defined group**. Enter a name for the group in the **Group Name** field.
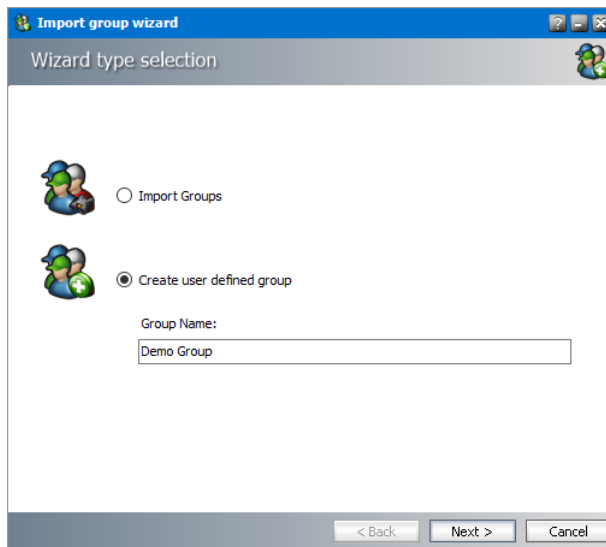
2. Click **Next**. The *User Defined Group - Add members to group* window opens. By default, the on-premise Microsoft Exchange server is the source for the list of mailboxes and groups that can be added to the user-defined group. To use O365 Exchange servers as a source for mailboxes and groups, select **Exchange Online**.

3. Click **Search** to return the list of all mailboxes and groups. To reduce the list of mailboxes and groups, you can specify a search term in the **Look for Name** search box. Only the initial letters of the mailbox or group **Display Name** can be specified and wildcards are not supported. The search term is case-insensitive.

    > **i** **NOTE:** If the **Exchange Online** check box is checked, only the online Microsoft Exchange servers will be used as the source. If the **Exchange Online** check box is unchecked, only on-premise Microsoft Exchange servers will be used as the source. Mailboxes and groups that are highlighted indicate that they already exist in the Address Book Manager. The list summary above the list of groups will indicate how many mailboxes and groups are available.

4. Select one or more mailboxes and groups that want to add to the user-defined group. If you select one or more groups, all mailboxes in that group will also be add to the user-defined group during the import process.

5. Click **Next**. The *Summary* window opens that indicates the user-defined group that will be created.

6. Click **Finish** to start the group creation process. The *Creating Object* window opens. You can click **Back** to revise your selection of mailboxes and groups.

7. When the import process has completed, click **Close**.

Steps to verify the imported Microsoft Exchange servers

1. If the *Address Book Setup* wizard is still open, click **Close** to exit the wizard.

2. Open the Address Book Manager.

3. Click the **Servers** tab and verify the imported servers in the list view.
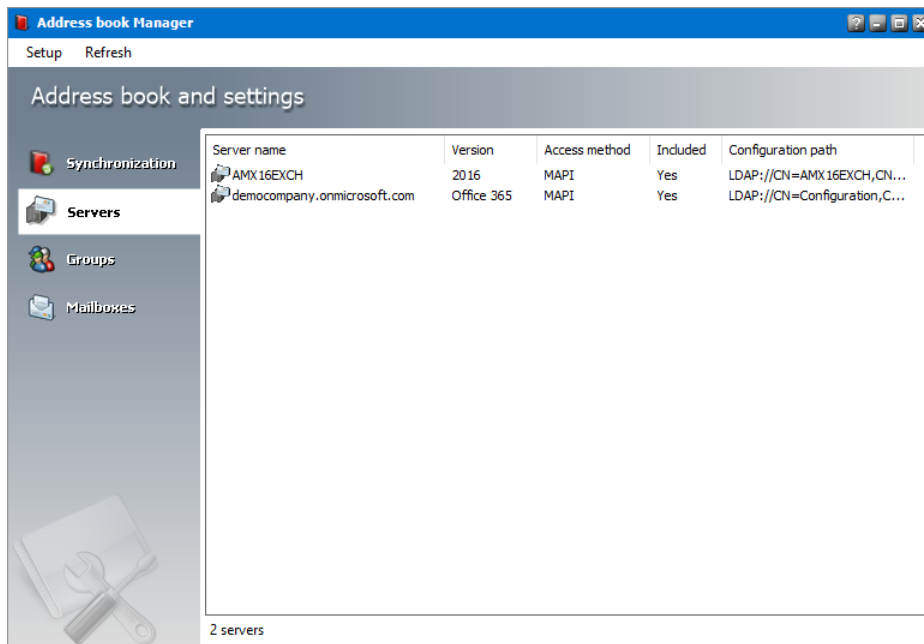
Steps to verify the imported mailboxes

1. If the *Address Book Setup* wizard is still open, click **Close** to exit the wizard.

2. Open the Address Book Manager.

3. Click the **Mailboxes** tab and verify the imported mailboxes in the list view.
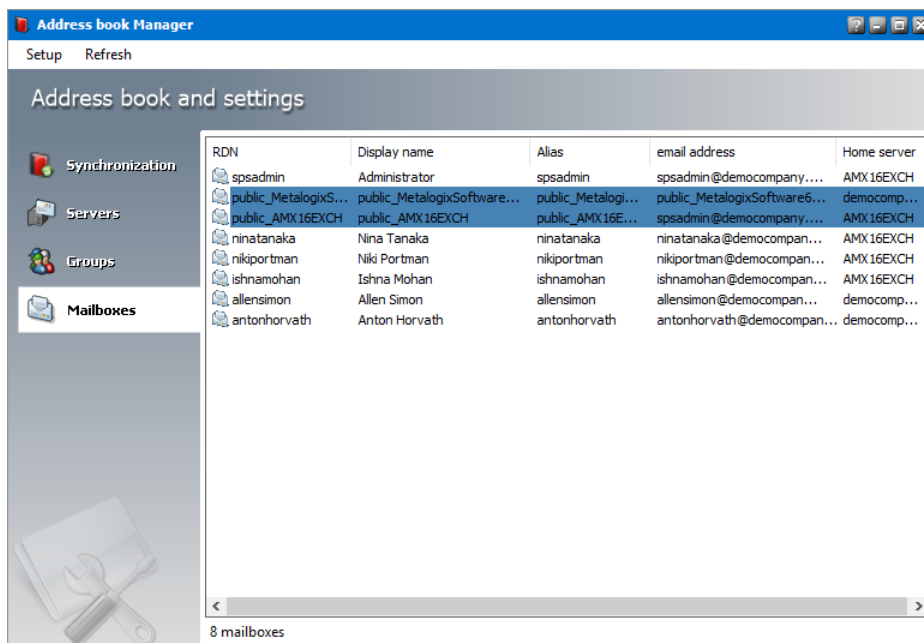
> **i**   **NOTE:** Mailboxes with names like *public_<name-of-Microsoft-Exchange-server>* also appear in the mailboxes list. These mailboxes are the public folders from the respective Microsoft Exchange server because Address Book Manager considers a public folder as a profile. These mailboxes are always highlighted in blue ▮ so that you can

distinguish them faster. Imported mailboxes must be added to a group in Address Book Manager to allow automatic archiving with scheduled jobs. If you do not add mailboxes to a group you can archive them manually.

Steps to verify the imported and user-defined groups

1. If the *Address Book Setup* wizard is still open, click **Close** to exit the wizard.

2. Open the Address Book Manager

3. Click the **Groups** tab and verify that the imported Active Directory and user-defined groups appear in the list view as expected. User-defined groups are highlighted in green ▊.
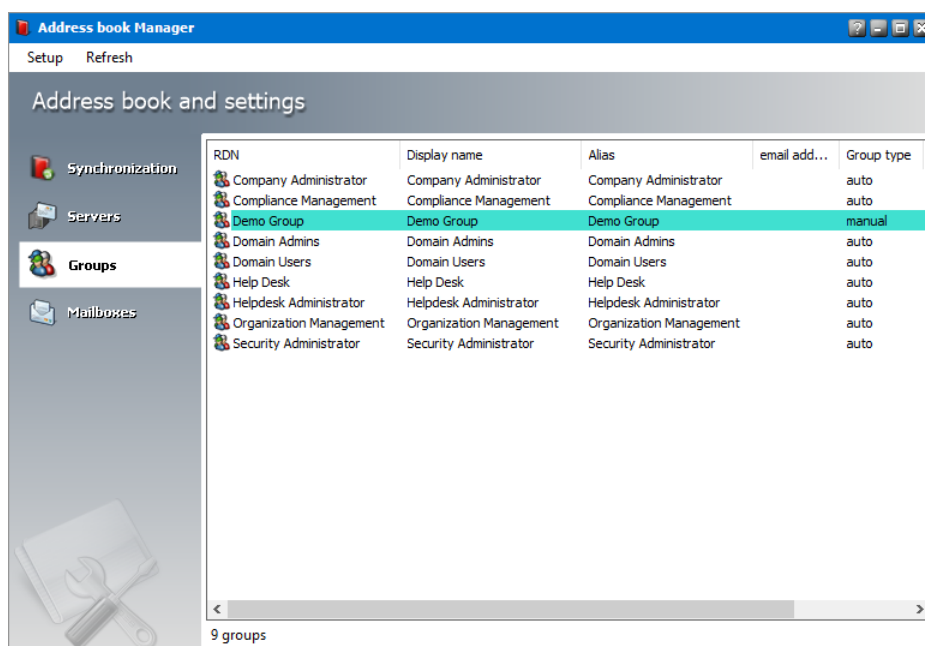
4. Select a group and right-click to open the context menu. Click **Properties**. The *Properties* window of the selected group appears.

5. Click the **Members** tab and verify that the list of mailboxes were imported as expected.

Enhancements

Metalogix Archive Manager for Exchange can be extended with *optional* components to enhance its capabilities.

Steps to install additional components

1. Run the **Metalogix Archive Manager Installation Package** to extract the files to a local folder.

2. From your install media folder, run the **MAMInstaller.exe**. The *Welcome* window opens.

3. From the navigation panel on the left, click **SETUPS**. The *Setups* window opens. Install one or more optional components:

   - **Archive Manager Universal Access Setup** - allows mobile users, Mac users and Linux users to work with archived emails. For more information see the *Universal Access Install Guide*.

   - **Archive Manager OWA Extensions Setup** - component that is installed on the Microsoft Exchange Server to provide Outlook Web Access to end-users. For more information see the *Outlook Web Access Guide*.

   - **Archive Manager SMTP Setup** - allows processing of messages from an external email server (O365, Gmail, Exchange, etc.). For more information see the *SMTP Guide*.

   - **Archive Manager PST Gatherer Setup** - automated extension to the PST importer feature. You must also install **Archive Manager PST Importer**. For more information see the *PST Importer Guide*.

   - **Archive Manager Outlook Addin** *<version>* **Setup** - gives authorized users the ability to archive and restore emails in Outlook 2016 and above (x86 or x64). For more information see the *Outlook Add-in Installation Guide*.

Maintenance

There are three maintenance options offered in the installer for each component.

- **Modify** - helps you to change basic settings or constituent components.

- **Repair** - helps you to reinstall the component.

- **Remove** - helps you to uninstall the component.

The steps to modify the HSM component is described below as an example. All components use a similar maintenance wizard.

> ℹ️ **NOTE:** For Express installations, it is recommended that you do not change any settings when you attempt to modify or repair a feature. If you intend to modify a feature, see the corresponding documentation which provides more information about the feature.

Steps to modify the HSM component

1. Double-click the installer for the HSM component (for example, `C:\Metalogix\Archive Manager Installation Package\HSM\HSM Setup.exe`). The **Welcome** window of the HSM maintenance wizard appears.
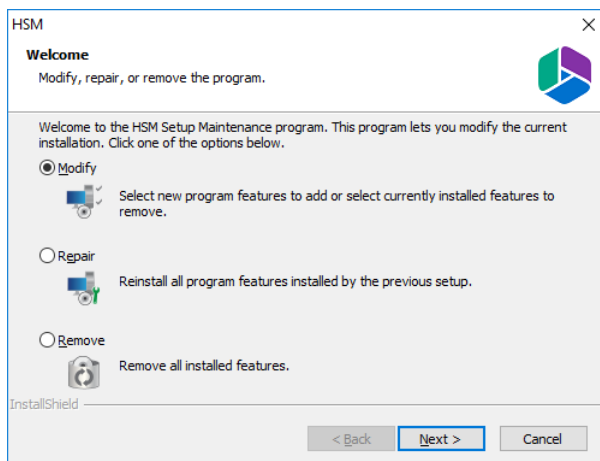
2. Choose **Modify** and click **Next**. The *Select features* window opens.
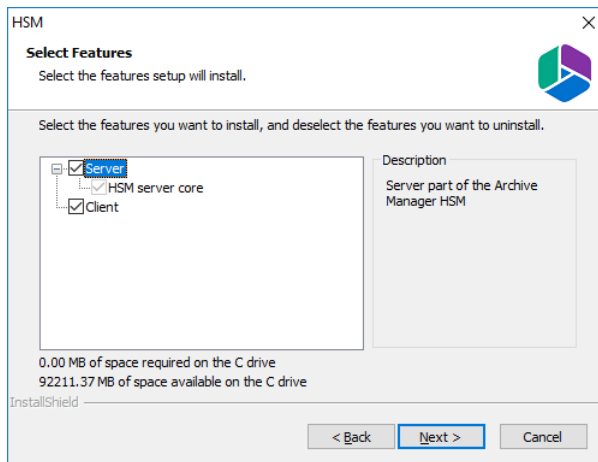
3. Click **Next**. The *Logon Information* window opens
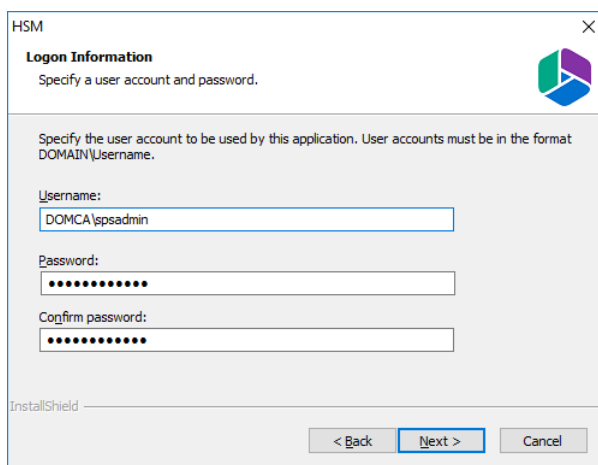
4. Enter the credentials in the **Password** and **Confirm Password** fields. Click **Next**. The *Ready to modify the program* window opens.
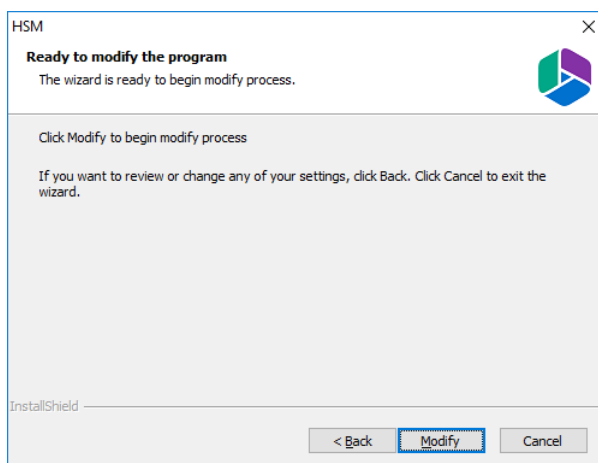
5. Click **Modify** to update the feature. The *Maintenance Complete* window opens.
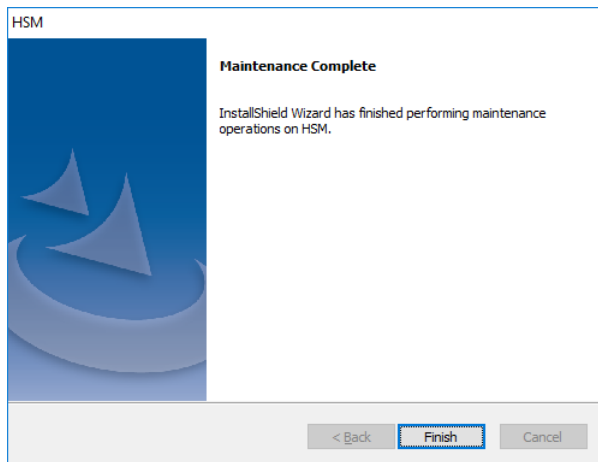
6. Click **Finish** to close the wizard and return to the upgrade wizard, or continue to upgrade other features.

ℹ **NOTE:** One or more services are stopped when modifications or repairs are performed. You must manually restart the services to ensure that all services have started.

Steps to restart services

1. Click Ctrl + Esc to display the list of windows programs.

2. Expand the Metalogix folder.

3. Depending on the product you have installed, click Start Exchange Services or Start File Services or both (if you have installed both products). Predefined batch commands will automatically start the services.

Upgrade

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

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

Steps to upgrade Archive Manager

1. Download the latest Metalogix Archive Manager for Exchange install media. For instructions see Steps to download the install media.

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.
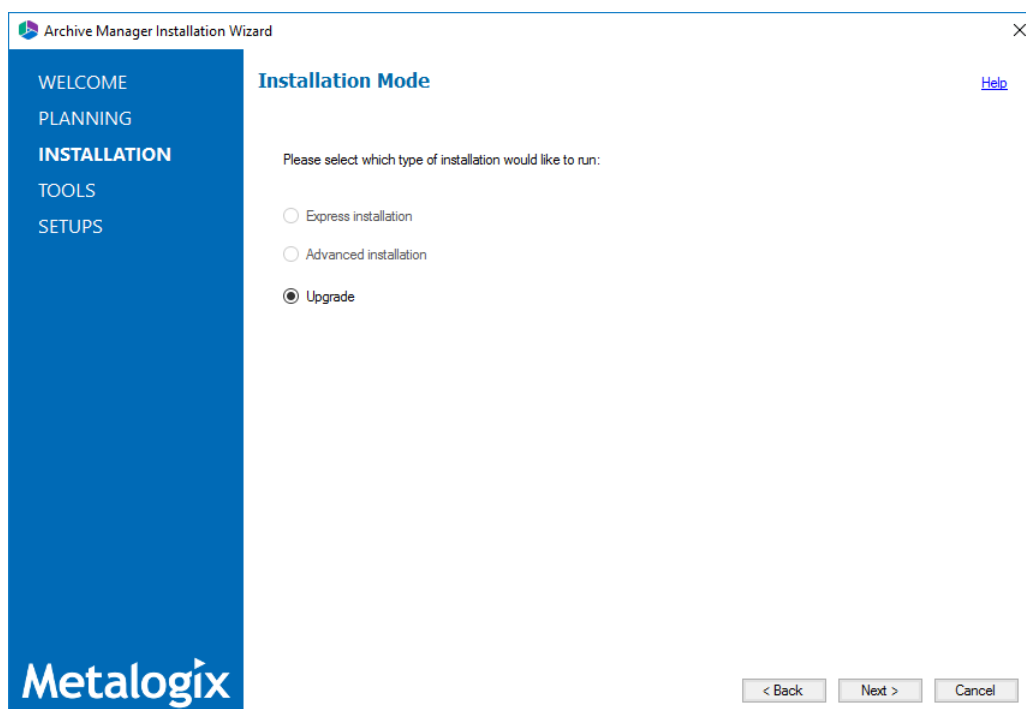
4. Click **Next.** The **Installation Components** page appears with a list of components that are already installed on the server. Select the components you want to upgrade. You should upgrade all the components to ensure the application features work as expected.
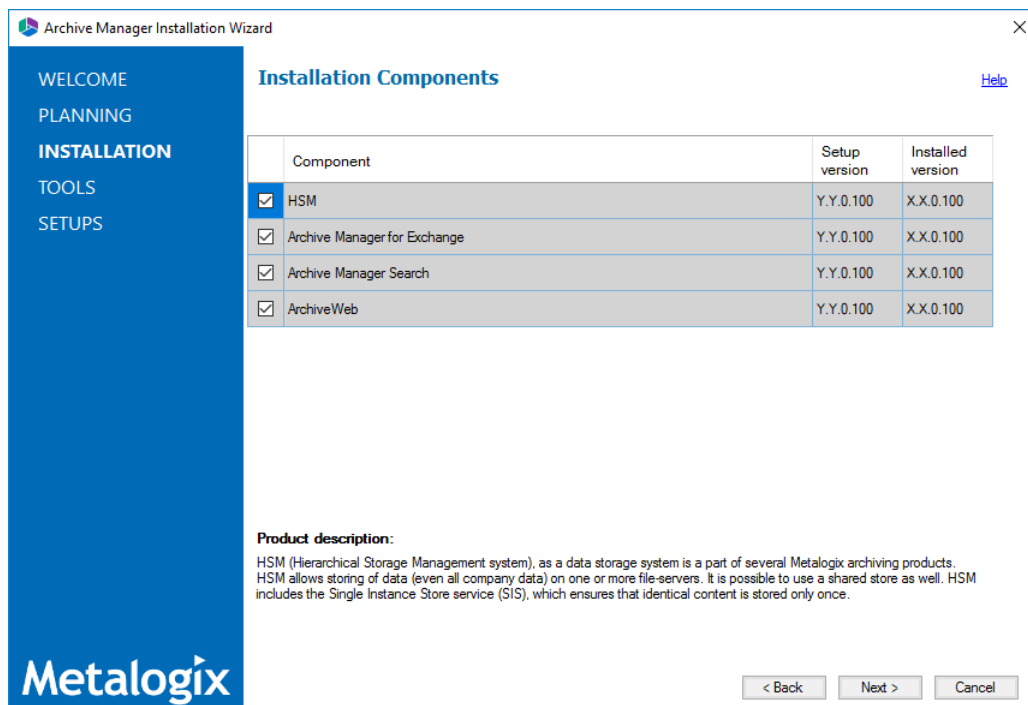
5. Click **Upgrade.** The **Checking Prerequisites** page appears. A check is conducted to find out if a new prerequisite is needed for the upgrade.
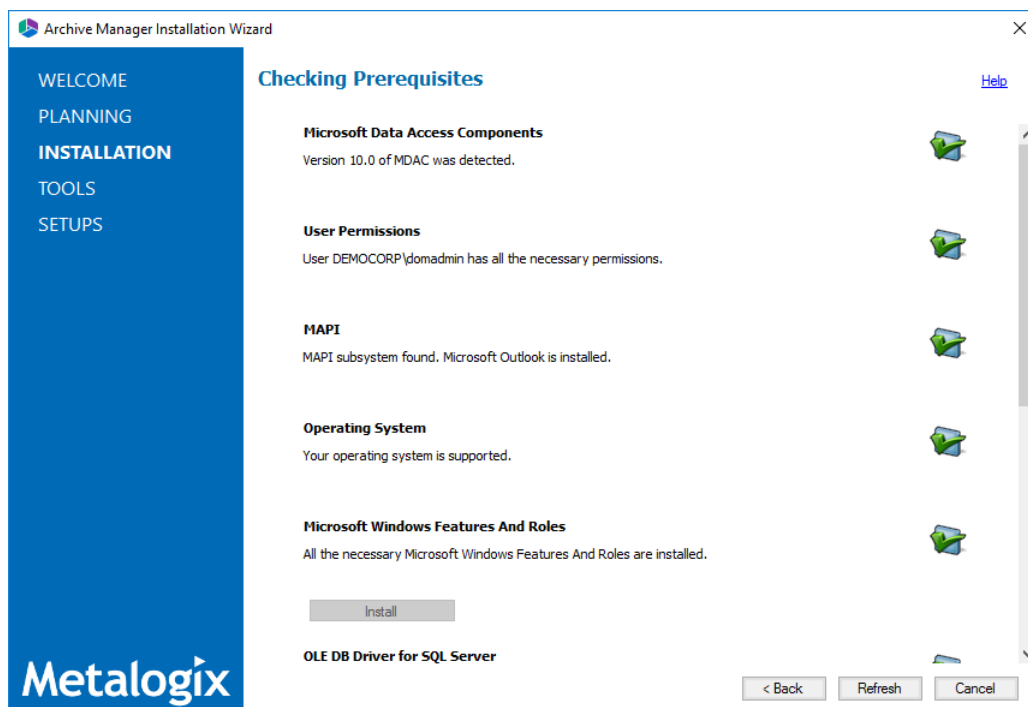
6. Click **Next.** The **Superuser Account** page appears. Specify and confirm the password.

> **i** | **NOTE:** The **Superuser name** cannot be changed.

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.
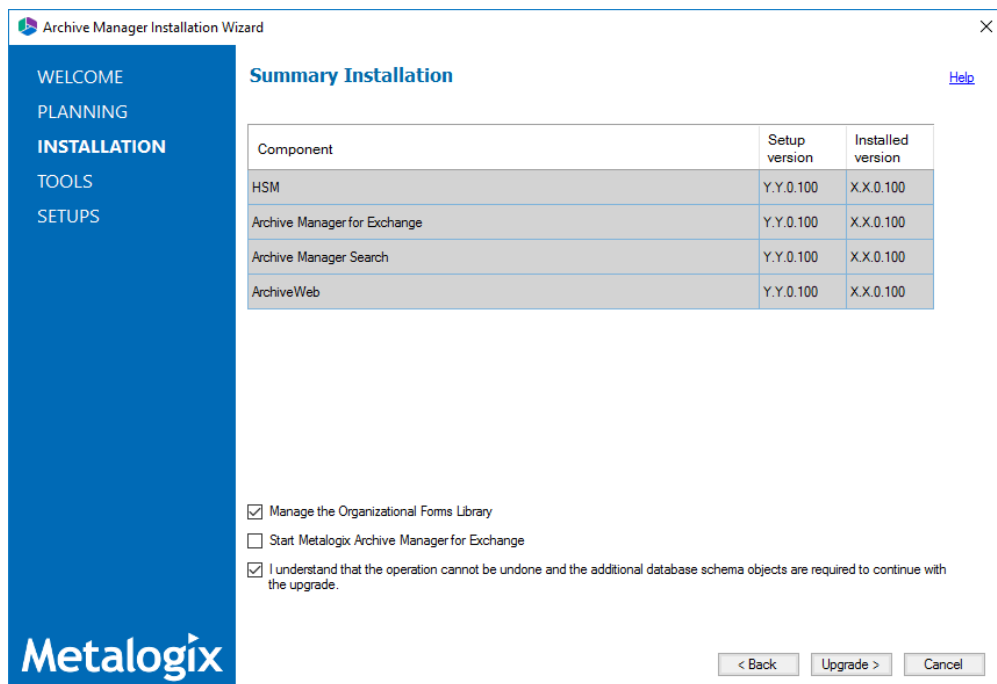
8. Click **Upgrade** to start the upgrade. Click **Back** to return to the previous page or click **Cancel** to exit the upgrade wizard. The upgrade progress for each component is displayed and the operation is confirmed. If the upgrade wizard detects that one or more features selected for upgrade are 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.
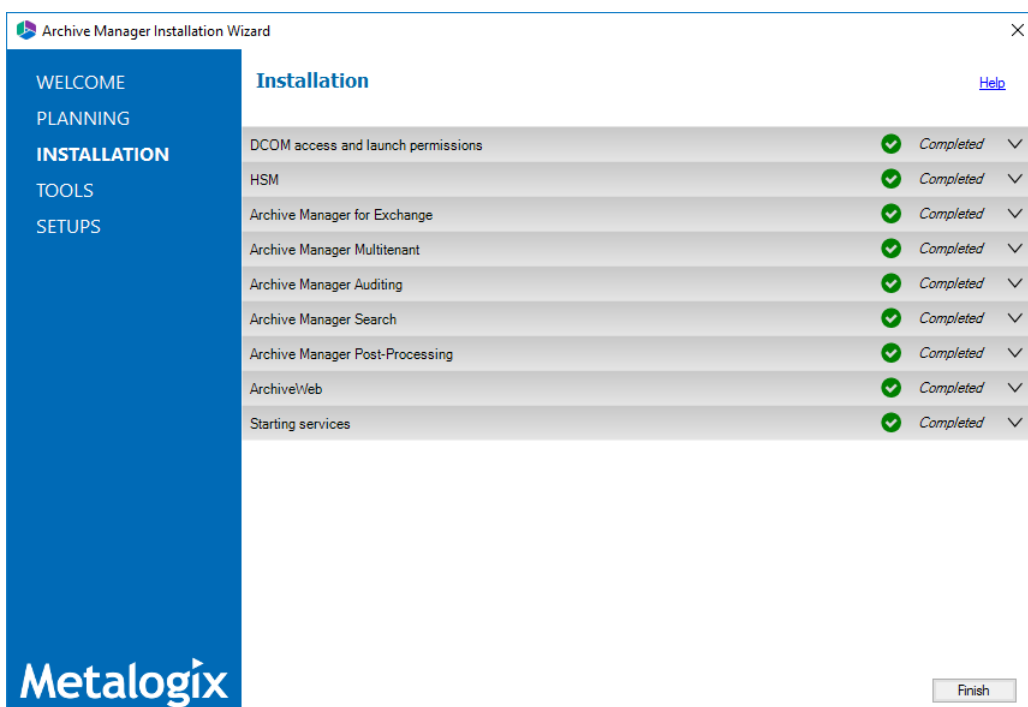
9. Click **Finish** to close the wizard when all the components are upgraded.

10

Appendix

In this section:

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Steps to grant Remote Desktop Access
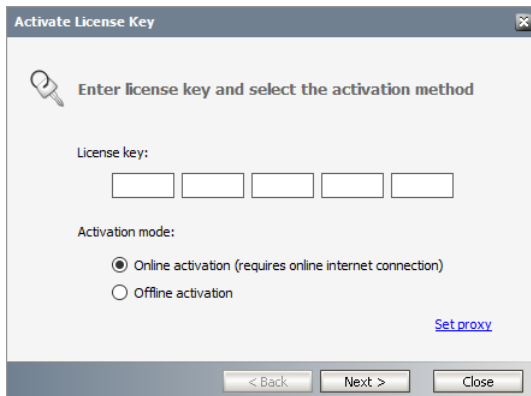
Follow the steps below to grant the required privilege to log on through Remote Desktop Services:

1. Log in to the server with the local administrator credentials.

2. Navigate to **Start** > **Run.** Enter **secpol.msc** and click **OK**.

3. From the *Security Settings* pane, navigate to **Local Policies** > **User Rights Assignment**.

4. From the right-hand pane, double-click on **Allow log on through Remote Desktop Services** to open the properties window.

5. Select the *Local Security Settings* tab and click **Add User or Group...**

6. Add the Enterprise Administrator account.

7. Click **OK** to save the changes and exit.

License Activation

Online activation
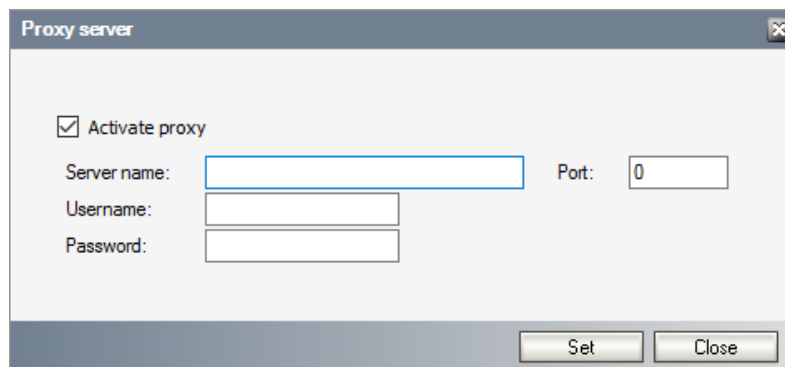
1. In the *Activate License* window, enter the license key.

2. If you want to activate the license online, select **Online Activation** , and then click **Next**.

> **i** **NOTE:** If your computer is behind a firewall, click the **Set Proxy** link. The *Proxy Setup* dialog appears.
>
>
>
> a. Select **Activate Proxy** and specify the proxy information as described below:
>
> b. **Server Name** - enter the name of your proxy server.
>
> c. **Port** - enter the port number of the proxy server.
>
> d. **Username** and **Password** - Specify the credentials of the user who is authorized to access the proxy server.
>
> e. Click **Set** to save the information, or click **Close** to return to the *License Key Information* dialog.

3. If the license key is validated successfully, the confirmation message appears along with the license details. Click **Finish** to close the dialog.

Offline activation

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

1. In the *Activate License* window, enter the license key.

2. select **Offline Activation**. The *License Key Information* window displays additional steps that are required.

3. **Step 1: Collect the activation data to the clipboard or to a file**

   a. Select from the two options described below:

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

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

4. **Step 2: Submit collected data**

   a. Click **Go**. The **Metalogix License Activation** web page appears.

   b. Follow the instructions to get the **Activation Key file** (with the file extension DAT) is made available for download. Save this file to a location of your choice.

5. **Step 3: Paste Activation Response**
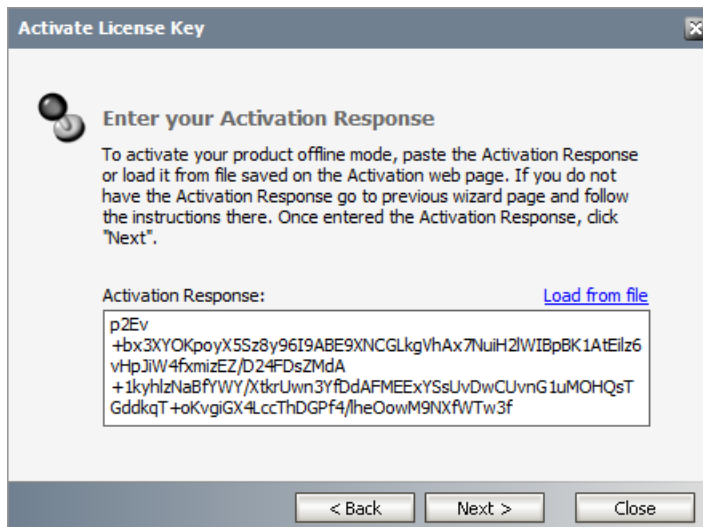
a. Click **Load from File**. The Windows file dialog appears.

b. Locate the activation key file and click **Open**. The text appears in the **Activation Key File** field.

6. **Step 4: Activate offline**

   a. Click **Next** to complete the activation process.

7. If the license key is validated successfully, the confirmation message appears along with the license details. Click **Finish** to close the dialog.

Registering Metalogix in Azure AD for EWS

1. Open https://portal.azure.com/ and login as administrator.

2. Click **Azure Active Directory**.

3. From the left panel click **App registrations** and then **New registration**.
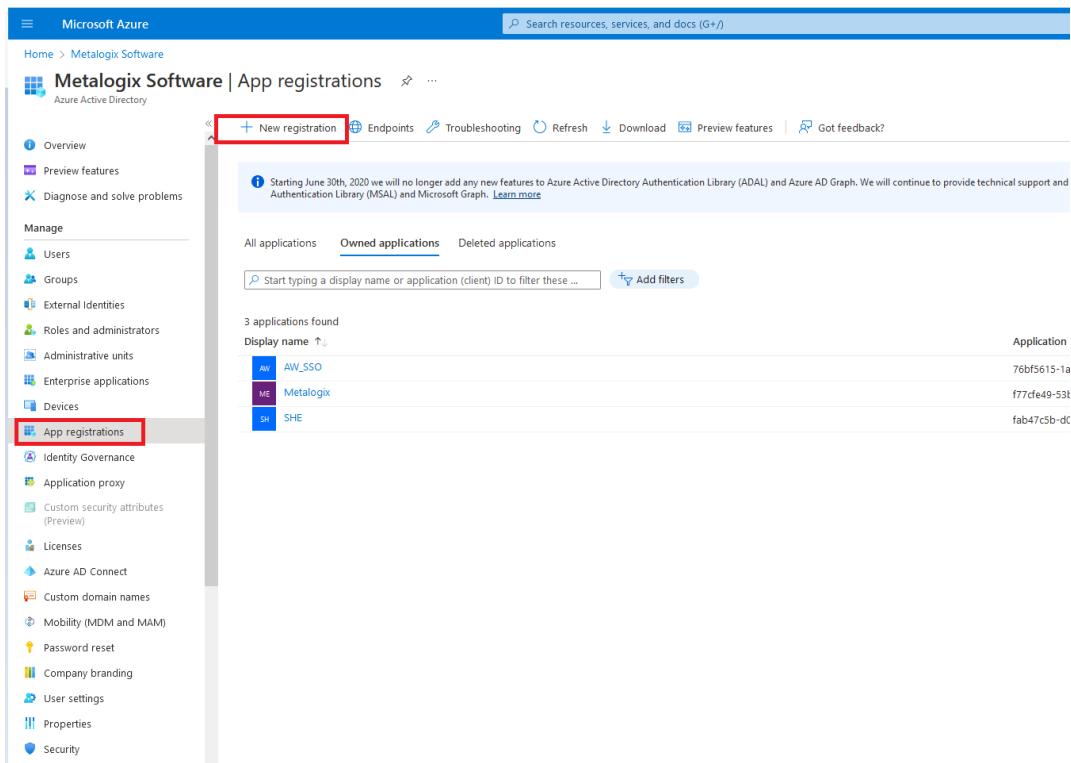
4. Fill in the name. For example, MetalogixClient. Select **Accounts in this organizational directory only**. Then click **Register**.

5. Your client is created. Now you can see the client properties. Click **API permissions**.
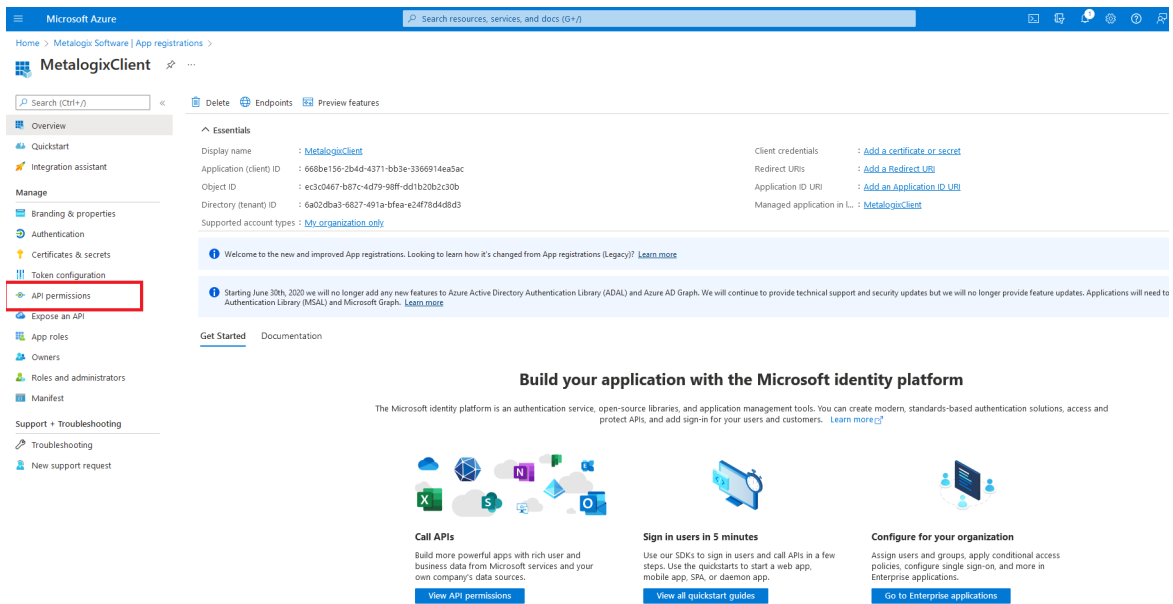
6. Click **Add a permission** to open the *Request API permissions* window. Click **APIs my organization uses** and select **Office 365 Exchange Online**.
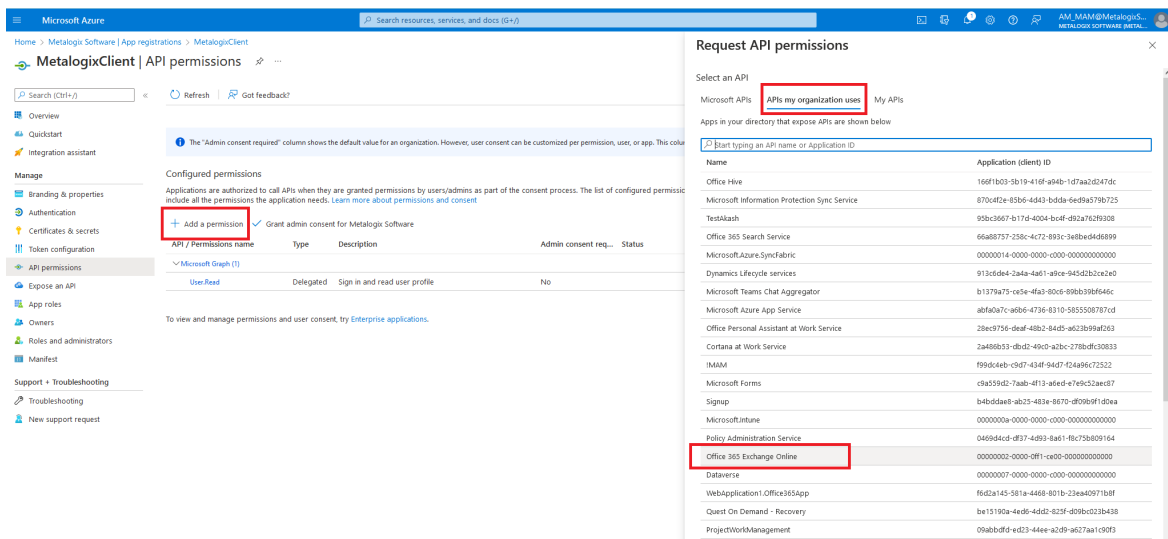
7. In the permissions page, select **Application permissions** and add **full_access_as_app** and **Exchange.ManageAsApp**. Click **Add permission** to confirm your selections. After that you must Grant admin consent for
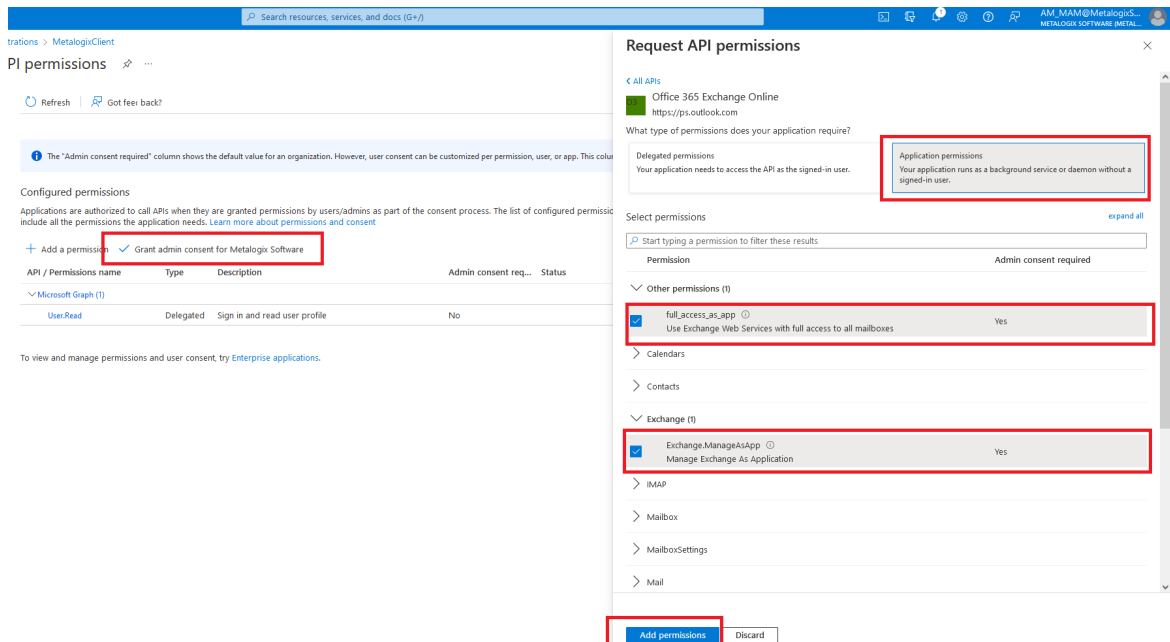
8. Go back to the application page (**Hint**: click the registered application name in the breadcrumbs link. For example, MetalogixClient). We need to create the client secret which will be used for authentication.

9. From the left panel, click **Certificates & secret**. Click **New client secret** and fill in the options in the *Add a client secret* pane. Change **Expires** to **24 months** and click **Add** to confirm.
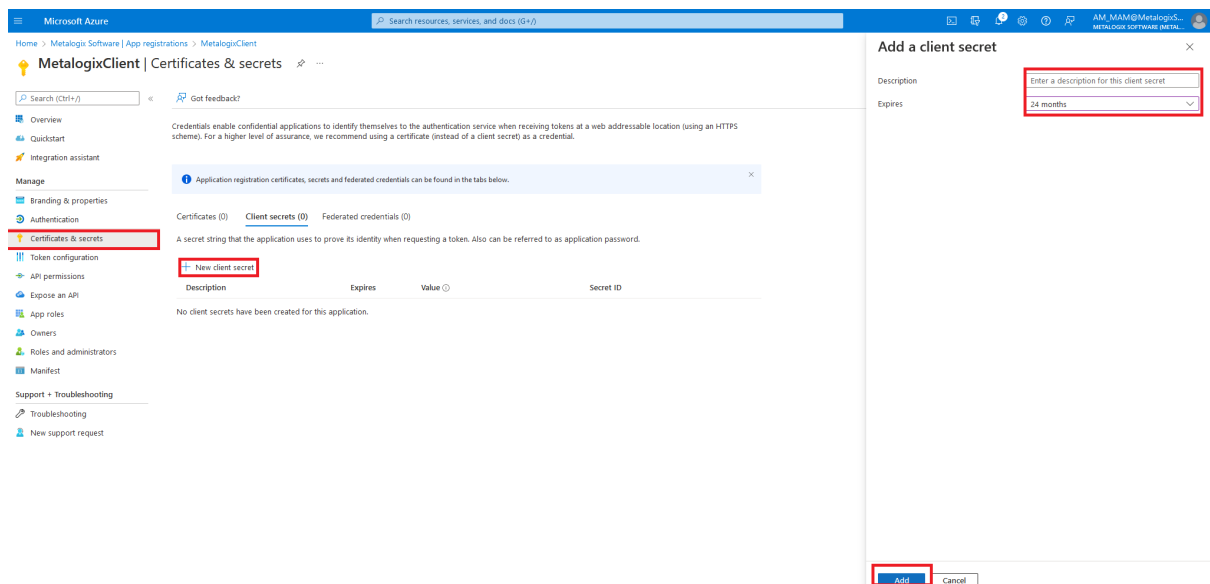
10. Copy a new client secret to Notepad.

11. From the left panel, click **Overview** and copy the **Client ID** value to notepad. You now have the credentials for connecting in Notepad.

12. Before you start using the application you must add a role for Exchange Administrator. Go to Azure active directory (Home > Metalogix Software) and click **Roles and administrators**.

13. Find **Exchange administrator** role and double click it.

14. Click **Add assignments** and find your application. For example, MetalogixClient. Select it and click **Add** to confirm.

15. Open the Archive Manager Administration Center and import Exchange Online server with the credentials you saved in your Notepad.

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- Chat with support engineers online

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