



Metalogix<sup>®</sup> Archive Manager for Exchange 8.8

## **Universal Access 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.

Metalogix® Archive Manager for Exchange

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# Contents

- About Universal Access ..... 4**
  - Software Requirements ..... 4
  - Installation ..... 4
  - Configuration ..... 5
  - User Interface ..... 9
- About Us ..... 10**
  - Contacting Quest ..... 10
  - Technical Support Resources ..... 10

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# About Universal Access

Universal Access is an additional feature of Archive Manager for Exchange. It is used as an additional IMAP server. When a user connects to this server, the email client downloads only archived emails. It consists of two components:

- **MAM IMAP Server Service** – this service processes IMAP requests from clients and outputs responses for these requests.
- **MAM IMAP Wcf Service** – communicates with Archive Manager for Exchange.

## Software Requirements

- .NET Framework 4.8
- Windows Server 2016 and higher
- Metalogix Archive Manager for Exchange 8.8
- Database
  - MS SQL Server 2014 or higher
  - Oracle 12c or higher

## Supported clients for Universal Access

- Outlook 2016
- Outlook 2019
- Outlook 2021
- Mozilla Thunderbird 31.5.0 and above
- Android 8 - default email client
- iOS 11 and above - default email client

## Installation

To install Universal Access follow the steps described below:

1. **Run the installer. The default location is** `C:\Metalogix\Archive Manager Installation Package\Universal Access\Archive Manager Universal Access Setup.exe`.

2. On the *Welcome* window click **Next**. The *License Agreement* window opens.
3. Read the license terms and if you agree, click **Yes** to continue. The *Choose Destination Location* window opens.
4. Review the destination location. Click **Change** to alter the location if necessary.
5. Click **Next**. The *Select Archive Manager for Exchange Server* window appears. Enter the following information:
  - **Archive Manager for Exchange** - name of the Archive Manager for Exchange server or click **Browse** to manually locate the server.
  - **Use HTTPS** - select this checkbox to use the HTTPS protocol.Click **Test server** to verify that the connection to the Archive Manager for Exchange server is successful.
6. Click **Next**. The *HSM Server* window appears. Enter the following information:
  - **HSM Server** - name of the HSM Server or click **Browse** to manually locate the server.Click **Test server** to verify that the connection to the HSM Server is successful.
7. Click **Next**. The *Logon Information* window opens. Enter the credentials of the user and confirm the password. Typically this is the administrator or the superuser account used in Archive Manager. If the components are being installed on a different domain computer, the user must have sufficient privileges to run the services.
8. Click **Next**. The *Firewall Settings* window opens. Select the check box to allow the installer to add selected Archive Manager Universal Access services to the Windows Firewall Exception list. Archive Manager components will be then able to communicate through the firewall.
9. Click **Next**. The *Ready to Install the Program* window opens.
10. Click **Install**. The *Setup Status* window opens to display the progress of the installer.
11. When the *InstallShield Wizard Complete* window opens, click **Finish** to continue with the configuration.

## Configuration

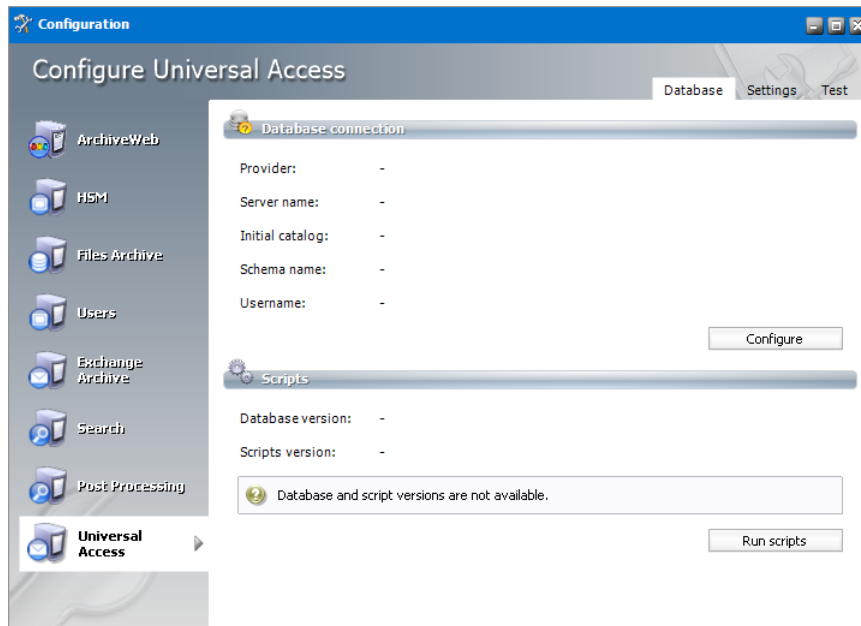
When the installation completes you must configure the feature with the Archive Manager Configuration tool as described in the steps below. .

### Configure the Database Server

1. When the installation completes the Archive Manager Configuration tool opens. You can also click **Start > Metalogix > Archive Manager Configuration** to open the Archive Manager Configuration tool. Depending on your environment you may see several tabs on the left feature pane. If you install the Universal Access feature components on a computer that does

not have the Archive Manager Configuration tool pre-installed, a new Archive Manager Configuration tool is installed on that computer, and only the **Universal Access** tab is visible.

2. Click the **Universal Access** tab to start configuring the feature.



3. Click **Configure**. Choose your database provider.

**i** **NOTE:** The configuration tool can create the MS SQL database in the specified SQL Server. However, an Oracle database must be available in advance.

4. Click **Next**. Depending on your choice of database provider fill in the text fields as described below:

*For Microsoft SQL Server*

- a. **Server name** - name of the SQL server.
- b. **Initial catalog** - name of the Archive Manager database (e.g. MAMEXCH)
- c. **Schema Name** - name of the SQL Schema (e.g. **dbo**)
- d. **Authentication** - authentication type used for the database. Choose either **Windows authentication** or **SQL Server authentication**.
- e. **Username** - database login username if SQL Server authentication is the selected as the authentication mode.
- f. **Password** - password of the database user if SQL Server authentication is the selected as the authentication mode.

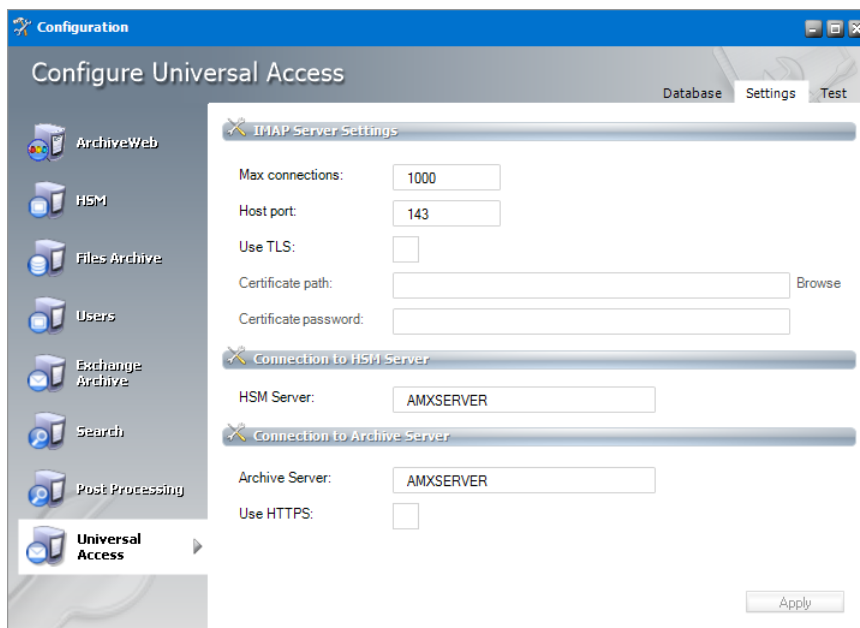
**i** **NOTE:** When updating Archive Manager from one version to another you must not change the following values in the Configuration tool on any of the tabs: Server name, Initial catalog and Schema name.

*For Oracle*

- a. **Oracle net name** - net service name that describes the network address of the database server in your `tnsnames.ora` file.
  - b. **Schema** - name of the Oracle schema from your `tnsnames.ora` file.
  - c. **Username** - database login username.
  - d. **Password** - password of the database user.
5. Click **Next**. The database provider settings are used to verify the database connection. Back on the Universal Access tab run the sql scripts by clicking **Run Scripts**.
  6. Click **Run Scripts**. The list of the scripts will appear.
  7. In case of **SQL Authentication**, click **Next** once more to accept the database login user and its password.
  8. Click **Next** to run the scripts.

## Configure server settings

1. Click the **Settings** tab to open the configuration window for the IMAP Server.



Provide the information as described below:

### For IMAP Server Configuration

This section is used if the IMAP Server for Archive Manager component has been installed.

- **Max connections** - max number of clients using Universal Access.
- **Host port** - enter the port number. The Port number needs to be changed only if TLS communication is used. In such cases enter 993.
- **Use TLS** - check whether you are using TLS communication. If TLS communication is used, configure certification details, otherwise these options can be ignored.
  - **Certificate path** - select the location of your certificate.

- **Certificate password** - specify if applicable.

#### For HSM Server Configuration

- **HSM Server** - enter the HSM Server name.

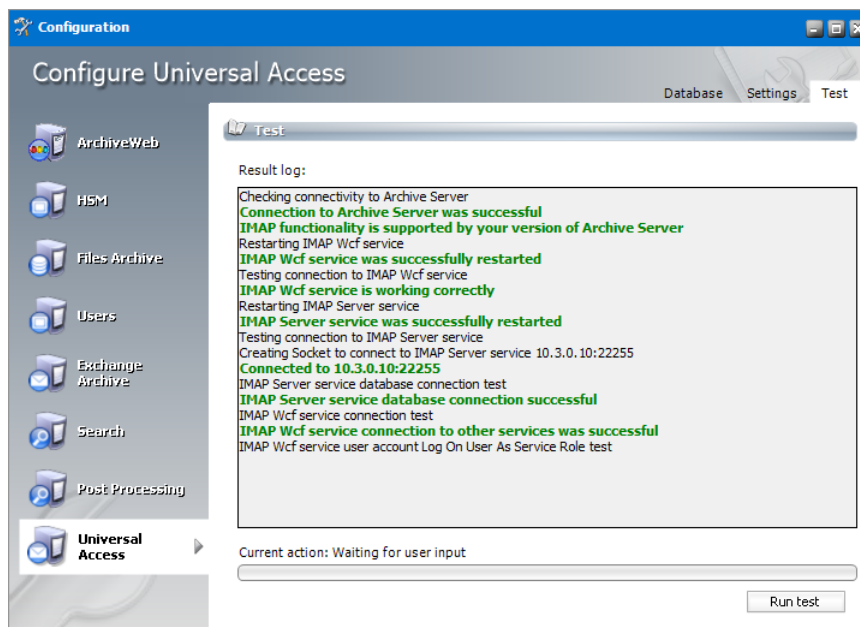
#### For Archive Server Configuration

- **Archive Server** - enter the Archive Manager server name.
- **Use HTTPS** - select this checkbox to use the HTTPS protocol.

2. Click **Apply** to save the settings.

## Test the configuration

1. Click the **Test** tab to test your configuration.
2. Click **Run test**. The results will be displayed in the results log.



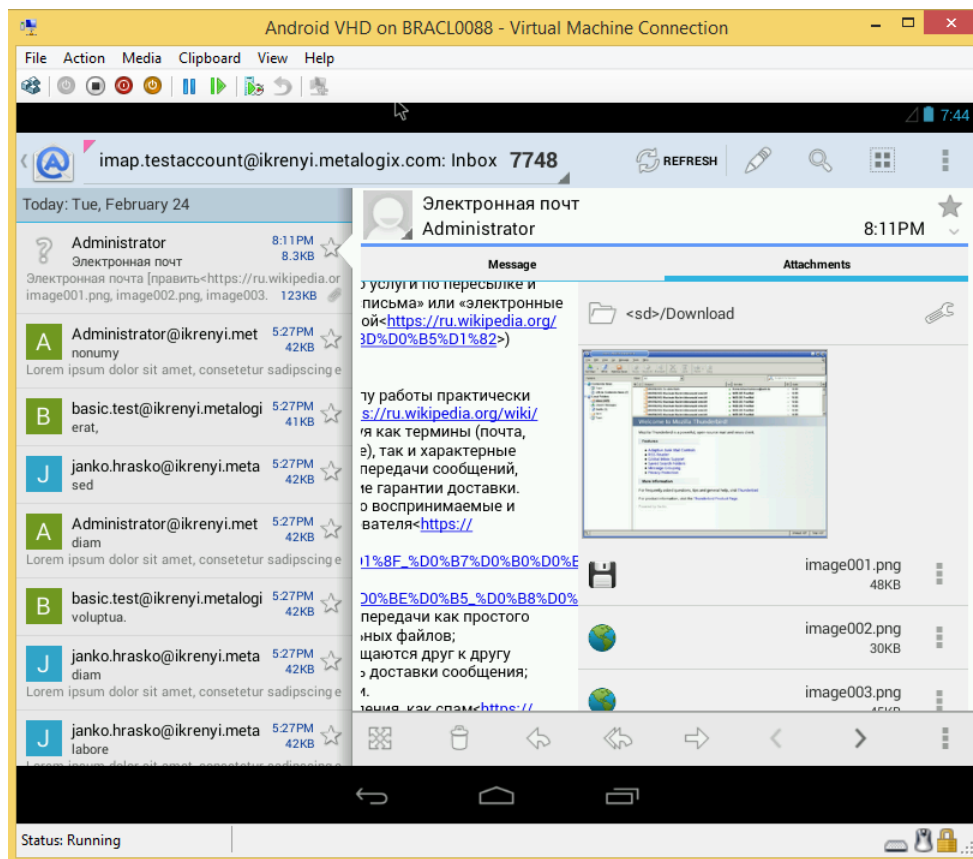
3. View the results in the **Result Log** pane.



# User Interface

Before you can use the Universal Access feature, you must set up your email account with the IMAP server as the incoming server on your desktop or mobile devices. The IP address and Port Number of the IMAP Server are available on the **Universal Access > Settings** tab of the Archive Manager Configuration tool.

After you have successfully configured the IMAP server on each device you will have seamless access on the devices. An illustration of an Android device is shown below.



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- 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