



## How to Install and Configure ArchiveOne® Enterprise (Policy)

Applies to: ArchiveOne Enterprise (Policy); Topic Last Modified: 29 July 2010.

### Note

This topic explains how to install and configure ArchiveOne Enterprise Policy.

### Before You Begin

Before you perform the procedure in this topic, be aware of the following:

- Installation user account must be a domain admin.
- Installation user account must be a member of the Local Administrators group on the ArchiveOne server.
- Installation user account must be a member of the Local Administrators group on the Exchange server.
- Installation user account must have the right to create a mailbox.
- Installation user account must have the right to create a Domain User Account.
- Installation user account must have the right to set permissions on an Exchange object.

### Procedure

#### Prepare for the ArchiveOne Enterprise (Policy)Install

1. Download ArchiveOne Enterprise (Policy) installer.
2. Logon to the ArchiveOne server with a Domain account that has Domain Admin privileges.

#### Install ArchiveOne Enterprise (Policy)

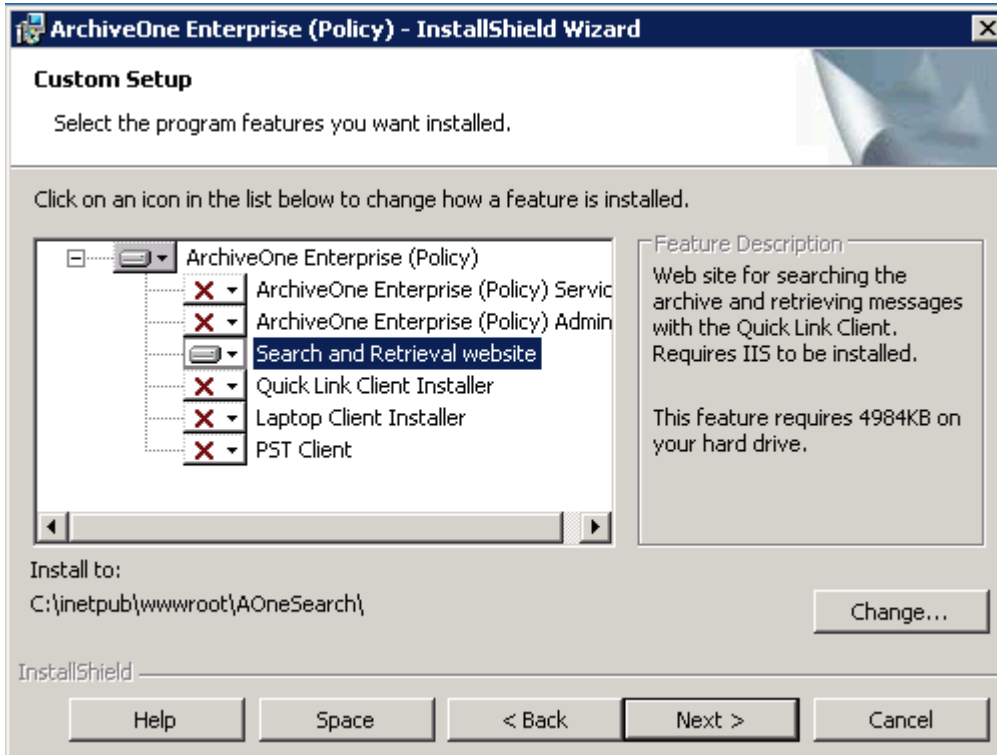
1. Run the newly downloaded ArchiveOne Enterprise (Policy) installer.
2. Click the **Next** button to initiate the installation.
3. Accept the License Agreement and Click **Next**.
4. Optionally, edit the User Name and Organization listed in the Customer Information screen and click **Next**.
5. The next page (Diagram 1) shows the components that may be installed. As you can see, only the web sites are set to install. This would be appropriate when setting up a front-end server to service retrieval requests from external users.

Under most circumstances select all components.

- Component 1 is the Service. Required by Server.
- Component 2 is the Admin Console. Optional.
- Component 3 are the Web services. Optional. Required on Front-end server.
- Component 4 is the Quick Link Client MSI Package. Optional.
- Component 5 is the Laptop Client MSI Package. Optional.
- Component 6 is the PST Processor Client. Required for PST processing functionality.

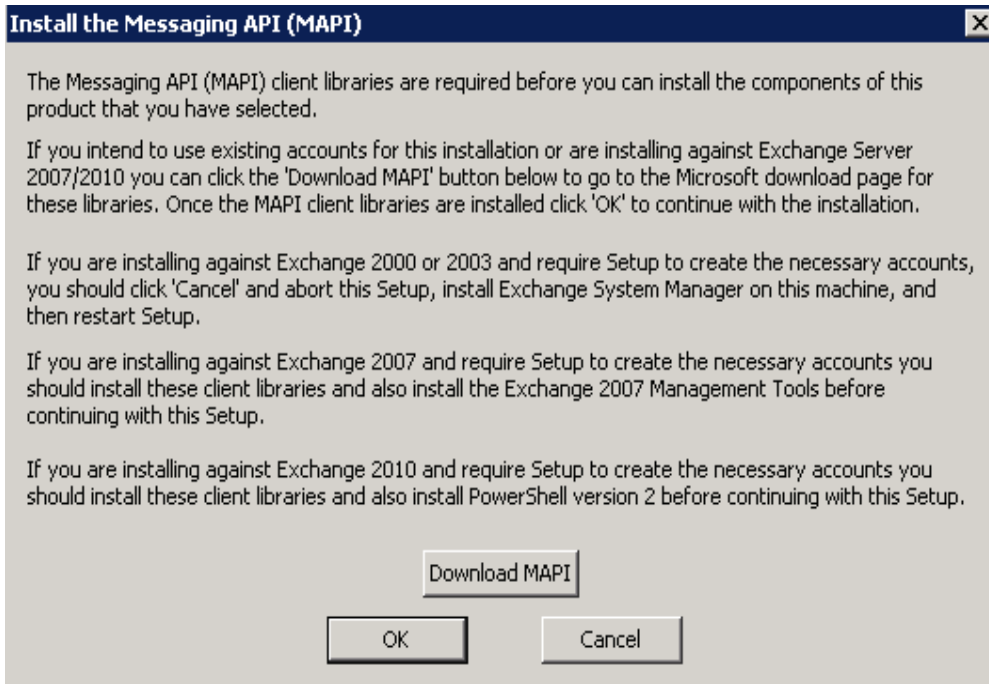
This dialog box also allows you to choose the local install directory.

When you have made your selections, click **Install**.



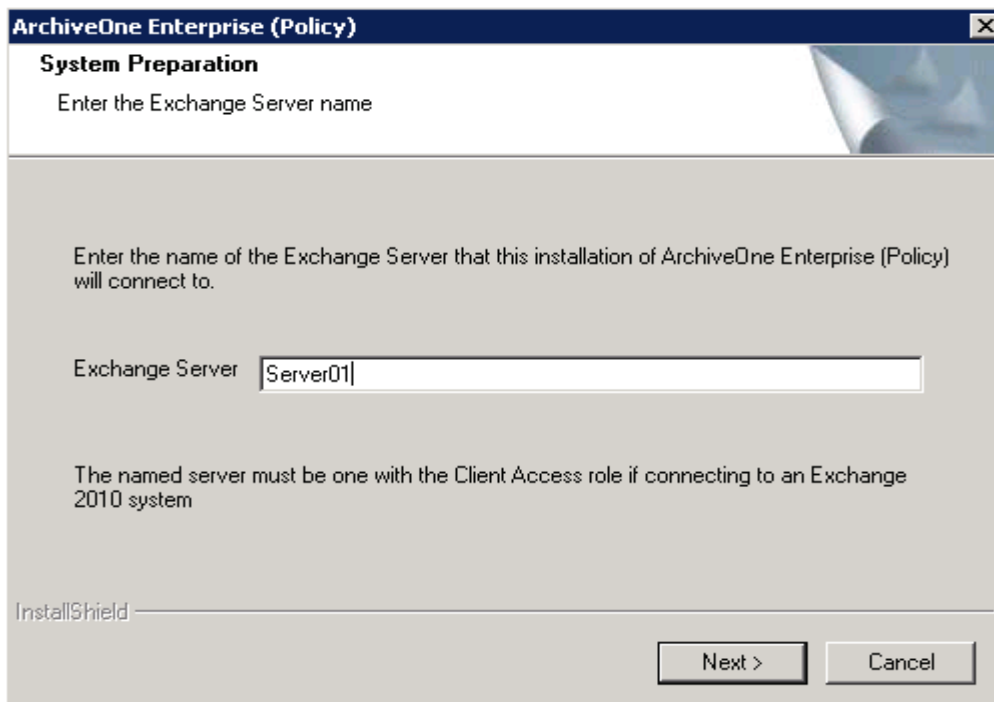
**Diagram 1**

1. Read the Acrobat Reader warning and click **OK**.
2. Read the Email Reader warning and click **OK**.
3. The next dialog box (Diagram 2) tells you that you need to install Downloadable MAPI. This is a Microsoft component that allows our software to configure the required Active Directory objects during software installation. This is not required if you're installing against Exchange 2003 SP2 and Exchange Management Tools are installed. Download this component and install it as per the Microsoft instructions. Then click **OK**.



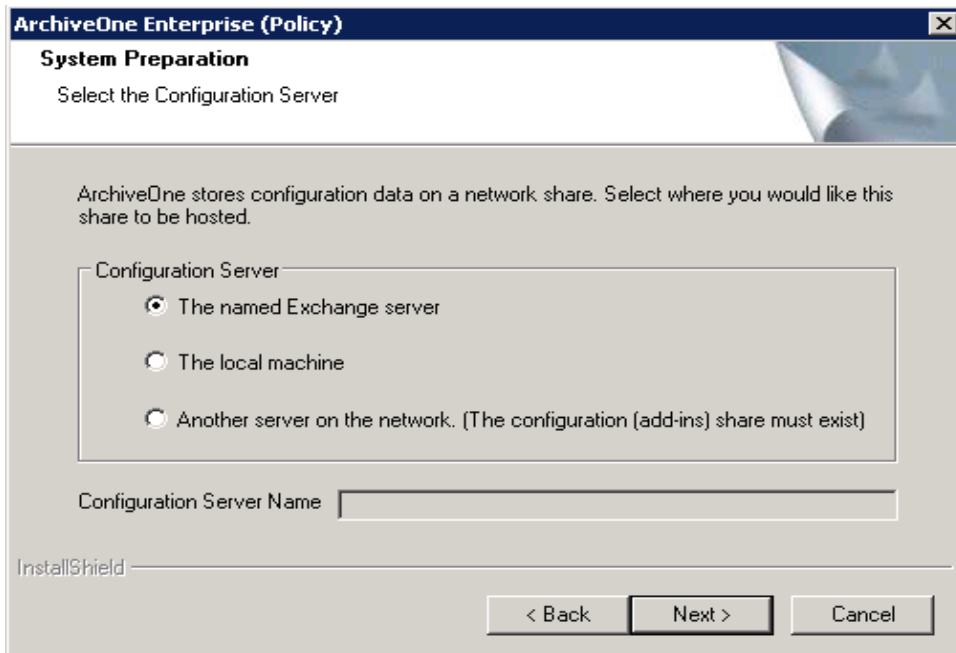
**Diagram 2**

- Occasionally you may receive an error message at this point. If necessary, please re-start the installer.
- Choose your Exchange server using the NETBIOS name not the FQDN. This is so ArchiveOne can connect to Exchange and process emails (Diagram 3).



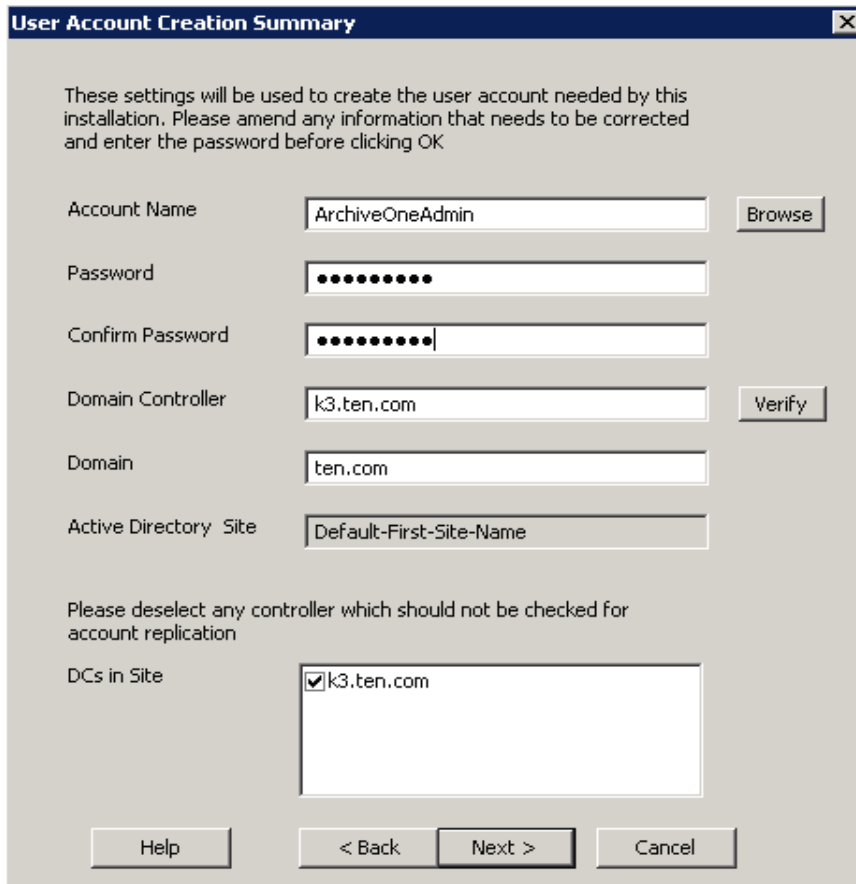
**Diagram 3**

- Next you will be prompted to select a location for the configuration data. This is stored in a share called '**Add-ins**'. It is created the first time you start ArchiveOne admin console. The default Exchange location is fine for most purposes, but you may want to put it locally if you intend to upgrade your Exchange environment in the near future. Option 3 is applicable in some Exchange High Availability clustered environments (Diagram 4).



**Diagram 4**

- Next you will be prompted to choose an ArchiveOne Users group. This group contains users who are allowed access to the ArchiveOne Admin Console. Click **Next**.
- You now have the option of creating the Service Account. Please note your password and click **next** (Diagram 5).



**User Account Creation Summary** [X]

These settings will be used to create the user account needed by this installation. Please amend any information that needs to be corrected and enter the password before clicking OK

Account Name:

Password:

Confirm Password:

Domain Controller:

Domain:

Active Directory Site:

Please deselect any controller which should not be checked for account replication

DCs in Site:  k3.ten.com

**Diagram 5**

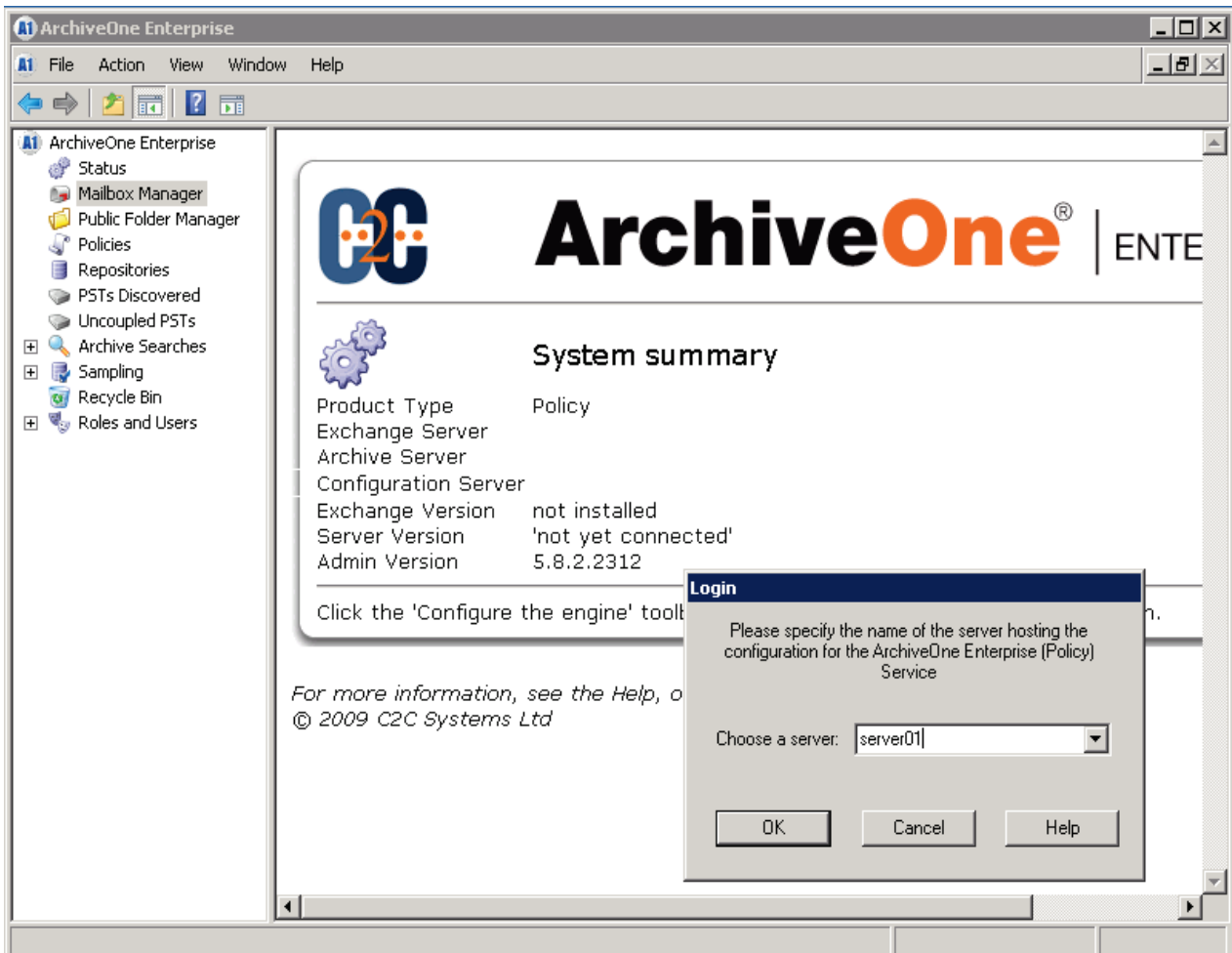
9. Next choose the 2<sup>nd</sup> radio button for your DCOM environment.
10. The installation routine then creates and configures your accounts for you (Diagram 6).

**Diagram 6**

11. Tick the check box and click Next to start the service.
12. The program features will now be installed.

## Configure ArchiveOne Enterprise (Policy)

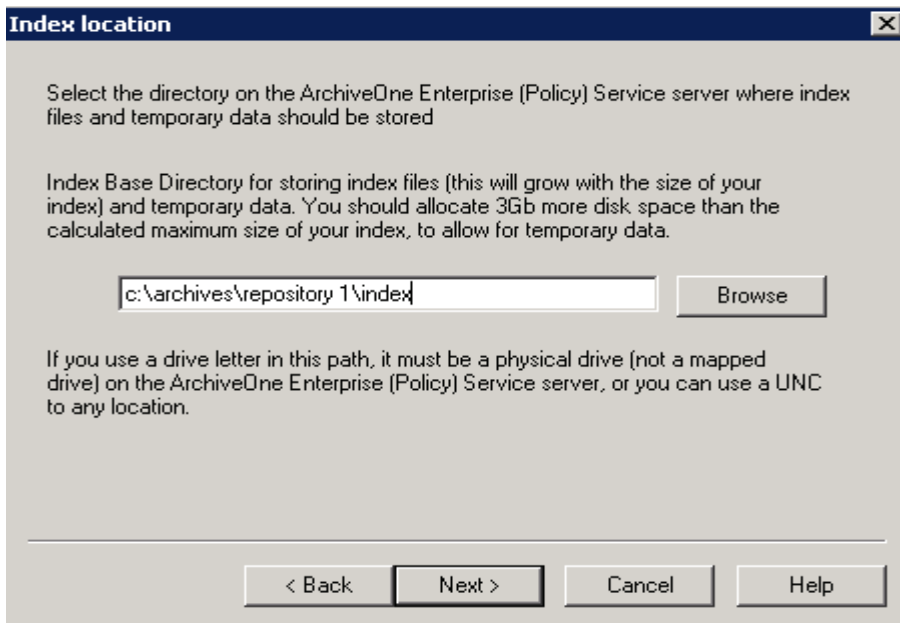
1. Please start the ArchiveOne Admin Console.
2. On selecting a node, for example, Mailbox manager, you will be prompted to connect to a server (Diagram 7). Select the server that hosts your configuration data as given in diagram 4.



**Diagram 7**

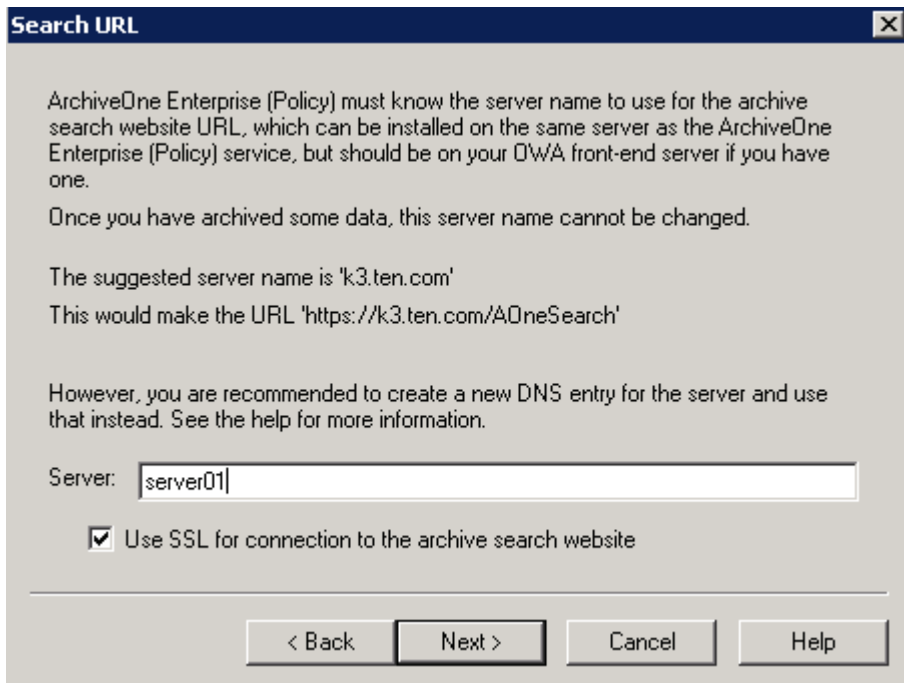
3. The System Configuration Wizard will now start.
4. Click **Next**. You will now be on the Repository Creation page. Enter a name for your first repository.
5. Choose whether you would like a storage manager. None is the default and includes UNC paths..
6. Choose a location for the Indexes under the repository created in step 17 (Diagram 8). This is a directory in your file system that will be used to hold the indexes for the archive data associated with the repository. It is best practice to enter a path with '**archives**' as the root of the path so that any backup software can back up the whole directory tree from this root source. For example:

C:\Archives\Repository 1\Index



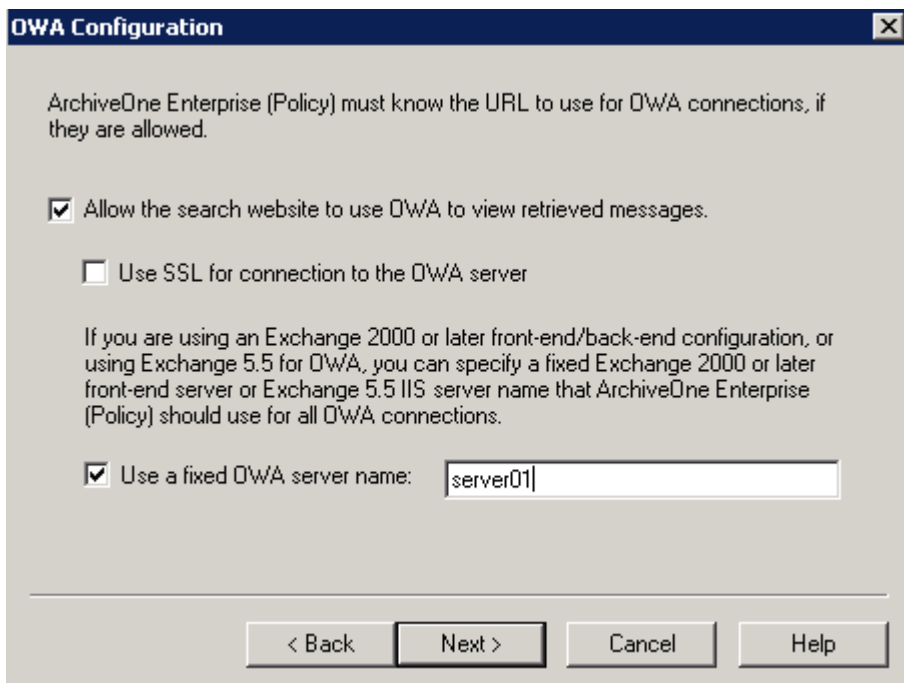
**Diagram 8**

7. The path for the archive directory under this repository must now be entered. This corresponds to the previously created index location and would take the form of:  
  
c:\archives\repository 1\archive
8. You now have the option to set rate control. This stops your archive server from being saturated at busy times.
9. Set the retention period as appropriate. This value is the time that archives are viewable to the end user. Archives are not deleted after this time.
10. Please click **review/change** and insert your **ArchiveOne License Key** into this text box. Click **OK**. If necessary, contact your reseller for licensing details. You can also contact [ukadmin@c2c.com](mailto:ukadmin@c2c.com) for further Licensing assistance.
11. The next dialog box requires that you set up a public folder to hold messages that you have retrieved after an archive search. You may create a new folder if you wish, but be sure to set the correct read/write permissions for it in Exchange. Consult your Exchange Administrator for further information on this process.
12. Next, you must enter the **URL for the Search & Retrieval Website** (Diagram 9). This Fully Qualified Domain Name (FQDN) should be publicly available if you have external users that need to retrieve email from their archives. If your users are all internal, a NetBIOS name may be entered. Click **Next**. You can also configure your DNS services to resolve this domain name to different IP addresses depending on host location (split-DNS). This will allow internal and external users to access their archives.



**Diagram 9**

13. You are now prompted to provide details of your OWA configuration to ArchiveOne (Diagram 10). Again, if you have external users that need to make archive retrievals, this needs to be a publically available domain name. If internal, then only a NetBIOS name will suffice. You can also configure your DNS services to resolve this domain name to different IP addresses depending on host location (split-DNS). This will allow internal and external users to access their archives.



**Diagram 10**

14. You are now given the opportunity to change the default folder names that ArchiveOne injects into each user's mailbox. These will appear in each Outlook session and are required to provide the end-user Archive Search and Browse Archive functionality.
15. The next page shows you the location for the temporary storage data. This is where ArchiveOne stores transitory data during the archiving process. 10GB of space should be available at this location.
16. The Offline Archives page is the last dialog and affords you the opportunity to configure a location for the user's Offline Repository. The default is to store it in the user's Windows Profile under **application data**.
17. Finish.

### **For more information**

For assistance with other features of ArchiveOne Enterprise (Policy), see more ArchiveOne Enterprise (Policy) documentation available from C2C:

- [C2C website](#)
- [C2C Support Portal](#)