



Archive Manager Quick Setup Guide

This guide will take you through the easiest route to get Archive Manager up and running.

Archive Manager is very flexible, but because of this it can also be more challenging to deploy than a more rigid solution. The steps below will get you up and running, however we recommend that you read the user guide and experiment with Archive Manager before you set it off archiving your live file system.

PLEASE FOLLOW ALL OF THE STEPS BELOW EXACTLY AS THEY ARE GIVEN.

If you are upgrading from an earlier version please see the full User Guide.

Pre-Requisites

You must have an instance of SQL server available on your network to hold the configuration database. This can either be a local copy of SQL Express or a full remote dedicated SQL server. Very little load is placed on the configuration database, and it will normally be under 5MB in size.

<http://www.microsoft.com/express/sql/download/>

The install routine can use any instance of SQL2005 or later (local or remote), but we recommend using SQL Express 2008 for best performance.

Regional Settings and non-English Environments

If you operate in a Non-English environment then it is crucial that you follow these recommendations.

Archive Manager itself is fully Unicode compliant, and will have no problems running in any environment. However, CMD.exe, the Windows command prompt does not support Unicode. This can cause problems as depending on the options chosen; Archive Manager can use .bat files to hold file recall scripts that are executed by CMD.exe.

Unless you get the regional settings correct, certain localised characters may not be handled properly by client machines.

The Machine Archive Manager is installed on must have all of its regional settings set to the same as your workstations, and all of the workstations that will be accessing your file system should have their regional settings set to the same.

Archive Share -> Set up a share on your network in the location that you would like to store your archived files. Set the share permissions to allow at least 'change' to 'everybody', then ensure the NTFS permissions will allow normal users 'modify' rights and members of the 'Domain Administrators' group 'Full Control'.

Get the latest version -> Download the latest Archive Manager Setup routine from: <http://www.mltek.co.uk/archivemanagerdownload.aspx>.

Setup a Service Account:

Before you run the install you need to create a user account that the Archive Manager Service will use. The user account must:-

- Have 'Full Control' permissions over all the files you will be archiving.
- Have 'Full Control' permissions over the location(s) you will be archiving too.
- Have the 'Manage Auditing and Security Log' right on the machine Archive Manager is installed on, any machines it will archive content from and any machines it will archive content too (only if you have Windows 2008 or later Servers).

The easiest way to accomplish this is to make the account a member of the 'Domain Administrator's' group.

If the account you are using to run the Archive Manager Service is not a member of the Domain Administrators group then in addition to requiring suitable NTFS rights to be set up so it can access the required shares with Full Control permissions, it needs to have the extra right granted to it.

It must have these specified on a) the machine it is running on b) any machines it will archive files from c) and machines it will archive files too.

You can grant this right by either adjusting the Local Security Policy on the relevant machines, or by using Active Directory Group policies and specifying the settings in the Default Domain Policy

'Manage Auditing and Security Log' (2008 Server) = When Archive Manger archives a file it makes a copy of it in an archive, copies all attributes and security access options to it and then compares the copy to the original file before deleting the original file.

The security access options not only include the NTFS Access Control Lists, but also the auditing options as well. To replicate the auditing settings the chosen account needs the 'Manage Auditing and Security Log' right

The relevant setting can be found under 'Local Policies' -> 'User Rights Assignment'. Edit the 'Manage Auditing and Security Log' entry and add the account you created in step 3.

Alternatively you can set the settings using Default Domain Group policy in Active directory. 'Computer Configuration' -> 'Policies' -> 'Windows Settings' -> 'Security Settings' -> 'Local Policies' -> 'Manage Auditing and Security Log'.

Disable User Account Control on the machine Archive Manager is installed on (2008 Server or later).

The user right that you granted to your new account in the step above counts as an elevated privilege.

With User Account Control enabled Windows will prompt you before you use an elevated privilege, asking you to confirm if you want to perform the action in question.

Unfortunately there is a bug in User Account Control. If a service wants to use an elevated privilege, there is no way for User Account Control to prompt for confirmation in the same way it would do for a user. Instead of letting the action go through, it blocks it.

The only way around this is to disable User Account Control on the Machine in question.

Click on the Windows 'Start' button, then click on 'Run'. Type 'MSCONFIG' and press return. MSCONFIG will now open.

Click on the 'Tools' tab, then click on 'Disable UAC', click on the 'Launch' button, then once the command has executed reboot the machine when it is convenient.

Installing Archive Manager

Once done proceed with the install by running 'install.exe'

The install routine is fairly standard, until you get to the 'Service Setup Screen'. On this screen enter the details of the account you created above.

Once done proceed with the install until you get to the configuration database setup screen. Accept all the defaults and proceed. If you are then asked whether you would like to correct a problem with SQL authentication not being enabled click 'Yes'.

Now proceed with the install until you are presented the last screen. Leave 'Open Archive Manager' ticked and click finish.

Setting up a Job

The Archive Manager User interface will now open, followed by the welcome dialog.

If you have not already done so read the full user guide, and then close the user dialog.

Click on the 'New scheduled job' button on middle toolbar of the main user interface. Read the notice that comes up and then confirm you have read it by ticking the confirmation box and clicking 'Continue'.

The next few steps will take you through setting up a job using 'Per file soft links' that users can use to access archived files. Other types of link are available, and a description of each, along with the benefits and downsides of each can be found in the user guide.

Choose 'New job to archive files (no links/soft links)' and click 'Next'.

Type a name for the job in the top box (Job Name).

Click on the 'Browse' button next to the destination box. Browse through 'My Network Places' and then 'Entire network' to locate the 'Archive' share you created in the 'Pre-requisites' section at the beginning of this guide

Use the 'Make New Folder' button to create a new folder in your share for this job, give it the same name as this job. Once created select it and click 'OK'.

Click on 'next' to move to the source(s) selection screen.

Use the 'Browse' and 'Add' buttons to add the list of locations that you would like to archive files from to the 'Configured Locations' box.

At this stage we recommend that you use a sample set of data, and then later set up a new job starting from step 3 to archive your live files once you are familiar with how Archive Manager works.

When you have finished adding locations click 'Next' to move to the 'Options' screen.

Tick the 'Move instead of copy' option and answer 'Yes' to the pop up message.

Leave the rest of the options as they are and click on 'Next' to proceed to the 'File types screen'.

The options on this screen allow you to control the types of files that you want to archive. By default a job uses the central file types list to decide what file types to archive (to access it click on the 'General' drop down menu on the main user interface screen then click on 'File Types').

Amongst other things the options here allow you to set up a file types list just for this job.

Leave all the settings as they are and click 'Next' to go to the user account screen.

The user account that you added earlier should be visible. Ensure it is selected and then click on 'Next' to go to the utilization screen.

Leave the options on the utilization screen as they are and click 'Next' to move to the scheduling screen.

Set the schedule up so that it runs according to your needs and then click 'Next' to go onto the 'File Age' screen.

On this screen you choose how long a file must have been unused for before Archive Manager will archive it. 3 years is normally about right, but it will vary and should be set according to your file retention policies.

Once done click on 'Next' to move on to the last step, and then click on the 'Create Job' button.

Once the job has been created you can run it immediately by highlighting it in the bottom window of the main user interface and clicking on the 'Run selected Job' now button.

Setting up General Options

Notifications -> Archive Manager can email selected account status reports and notify you of any problems it encounters automatically.

Click on 'General' on the top toolbar on the main user interface and then click on 'Notifications'.

Click on the 'Add User' button and enter the email address of person you would like to receive these notifications.

Next, in the bottom half of the screen enter the details of the SMTP server that you would like Archive Manager to use to send notifications.

When done click 'Save Settings' and then close the screen.

Logs and Reporting

Click on 'General' on the top toolbar on the main user interface and then click on 'Logs and Reporting'. Tick the 'Extended Logs' tick box and click on 'save'.

Maintenance Job Settings

The maintenance job synchronises the permissions in your archive share(s) to those on your live file system. It also checks each archive's integrity, and can even migrate files around in an archive if a user moves their recall links around in the live file system.

In addition it will also return files that have been accessed by users to the live file system for locations in your archive that use folder based soft links.

Click on 'Maintenance' on the top toolbar on the main user interface and then click on 'Maintenance job'. Enable all the options and set the time of day you would like the maintenance job to run.

When done click on 'Save' to save your changes and close the screen.

Graveyard Jobs

After setting up your Archive jobs you should set up your Graveyard jobs.

Archive Jobs migrate old and unused files into your archive share (normally second line lower performance disk space), where they remain for a while until you are sure they are no longer needed.

Graveyard jobs go through your archive removing files that have been there for the period of time you specify, and removing links to them from the live file system.

They can either write files out to a new location, and then through the pre/post job tasks function (see the full user guide) trigger their final backup and deletion, or simply delete them from the system completely (assuming they will have been backed up during their time in the archive anyway).

To set up a graveyard job-> Click on the 'New Scheduled Job' button on the middle toolbar, confirm you have read and accepted the notice by ticking the confirmation box and then click on 'Next'. Then choose 'New Graveyard Job' and click 'Next'.

Follow the on screen prompts to set up your new graveyard job.