

# Archive Attender Version 3.5

## Getting Started Guide

Sherpa Software

(800) 255-5155

[www.sherpasoftware.com](http://www.sherpasoftware.com)



Under the copyright laws, neither the documentation nor the software can be copied, photocopied, reproduced, translated, or reduced to any electronic medium of machine-readable form, in whole or in part, without the written consent of Everest Software, except in the manner described in the software agreement.

© Copyright 2009 Everest Software L.P. d.b.a. Sherpa Software Partners  
All rights reserved. Printed in the United States.

Archive Attender, Mail Attender and Attender Utilities are registered trademarks of Everest Software L.P. Microsoft, Exchange and Outlook are either trademarks or registered trademarks of Microsoft Corporation in the United States and/or other countries.

Lotus, Lotus Notes and Domino are either trademarks or registered trademarks of the Lotus Development Corporation.



# Table of Contents

Introduction .....	4
Archive Attender Components .....	4
Where should I install Archive Attender?.....	5
System Requirements – Archive Attender .....	6
Installing Archive Attender .....	7
Installation Steps.....	7
Starting the Archive Attender Console and Help.....	16
Installation Exceptions .....	17
Manually Adding Archive Attender to the System Path.....	17
Manually Create the Archive Attender Web Application .....	19
Manually Create the Archive Attender Web Service Application .....	25
Uninstalling Archive Attender.....	26
Troubleshoot Problems Accessing Stub Messages.....	27
Contacting Sherpa Software .....	29



## Introduction

Thank you for choosing Archive Attender for Exchange®. Archive Attender is an extension of the features and capabilities in Sherpa Software's flagship email management product for Microsoft Exchange, Mail Attender® for Exchange Enterprise. Building on Mail Attender's ability to contain the size of email stores and PST files by exporting and deleting messages and attachments, Archive Attender enhances Sherpa Software's email management capabilities by providing the ability to move messages and attachments to an external device for long-term storage.

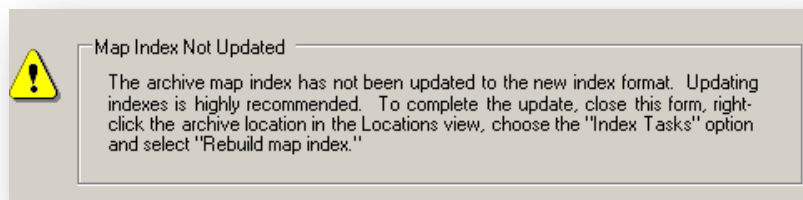
When used as a stand-alone utility, Archive Attender can archive messages from Microsoft Exchange mailboxes using age, date, sender, subject and size of messages as criteria. When used in conjunction with Mail Attender, the complete list of Mail Attender conditions, which include email content, attachment properties, mailbox properties, folder properties and many others, are available as criteria to archive messages from Exchange Servers.

Archive Attender's easy to use, policy-based architecture and its installation (which requires nothing to be installed on client computers), make it an ideal solution for administrators that need to efficiently and quickly archive from email stores.

**Upgrading to version 3.5** – If you are upgrading from a previous version of Archive Attender, you must currently be running a 3.x version of the product. If not, please upgrade from a 2.x version to version 3.21 and follow the upgrade steps before installing version 3.5.



*It is strongly recommended that that you rebuild the **MAP indexes** for any existing archive location after upgrading to version 3.5. While the old MAP index will function, the new format offers a greater degree of efficiency and reliability. The message seen below will appear in archive details to alert you that the MAP index version is out of date*



## Archive Attender Components

Two major components make up the Archive Attender product: an administration console and an archiving service.

- The console is used to configure and setup the archiving locations, identify the users to archive from, create policies to locate and move content from the users' mailboxes to the archives, perform searches on the indexed content stored in the archives and enforce cleanup settings to manage the archived data.
- The archiving service (an NT service), monitors the policies that have been created, queries mailboxes, retrieves the messages from them and moves the messages to the designated archive locations. The archiving service should be configured using a Windows account that has full administrative privileges to access all the Exchange Servers from where messages will be archived, as well as full read/write access to all archive locations. Based on the option selected in



the policy, a stub containing the original message header information and a link to the archived message will replace the original message in the user's mailbox.

A third optional component that may be installed for Archive Attender is a web application which is used to give users the ability to search messages archived out of their own mailboxes. If this configuration option is exercised by the administrator through the Archive Attender console, a folder will be automatically created within the mailbox for each configured user. This folder, the path for which can be configured by the administrator and will be visible to the user in Outlook, will display a web search interface for the users to search through all their archived messages.

## Where should I install Archive Attender?

Archive Attender can be installed on a desktop workstation or server. There are no minimum requirements for Archive Attender processing. However, more memory and processing power would certainly improve Archive Attender's performance.

The computer where Archive Attender is being installed must already have the Dot Net framework version 2.0 and Microsoft Internet Information Server (version 5.0 or higher) installed\*. Internet Information Server can be installed from the Microsoft Windows operating system installation disk. The installer for the Dot Net framework can be downloaded from either the Sherpa Software or the Microsoft websites.

If Archive Attender will only be used for compliance archiving by capturing emails out of the journal mailbox without user access to the archived emails, only the installation of the Archive Attender Console component is required. However, if users are to be given access to their archived messages, Archive Attender's Outlook console component must also be installed. This component includes an Internet Information Server (IIS) website and, by default, is installed on the same computer as the Archive Attender console.

**If the archived messages are to be accessible through Outlook Web Access (OWA), the Outlook console component must be installed on the Exchange Server that serves as the web server for external access to Outlook Web Access.**

**If you intend to use Archive Attender in conjunction with Mail Attender, installation of Microsoft Message Queuing is also required. This can be installed from the Microsoft Windows operating system installation disk.**

Please refer to the section titled **System Requirements** for the full list of pre-requisites for Archive Attender.



*\*Please do not install Archive Attender on a primary or backup domain controller. The limited privileges provided to the ASPNET account, used by Archive Attender, on a domain controller prevents the proper functioning of the product.*



## System Requirements – Archive Attender

### **Archive Attender**

The requirements for the installation of Archive Attender are as follows:

**Requires:**

*Windows 2000, XP Professional, 2003, Vista or 2008*

*Dot Net Framework version 2.0*

*Microsoft Internet Information Server 5.0 or higher (can be installed from the Microsoft operating system disk)*

*Outlook 2000 or higher or Exchange 5.5 or higher*

*Approx. 10MB - 40MB footprint on installation (varies if the Dot Net framework is installed)*

### **Archive Attender User Console**

These are the requirements to permit users to view and retrieve messages from their archive. If access to the archives is required through OWA, this component must be installed on the web server hosting the OWA web application.

**Requires:**

*Windows 2000, XP Professional, 2003 server or 2008*

*Dot Net Framework version 2.0*

*Outlook 2000 and up on users' computers*

### **Archive Attender with Mail Attender**

Using the two products in conjunction requires the installation of one additional component on the Archive Attender computer.

**Requires:**

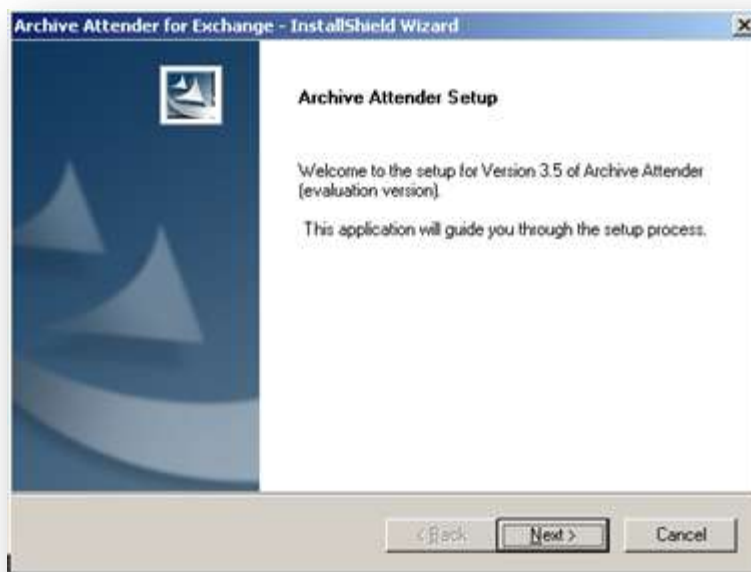
*Microsoft Message Queuing (can be installed from the Microsoft operating system disk)*

## Installing Archive Attender

### Installation Steps

The following is a general set of steps to install Archive Attender.

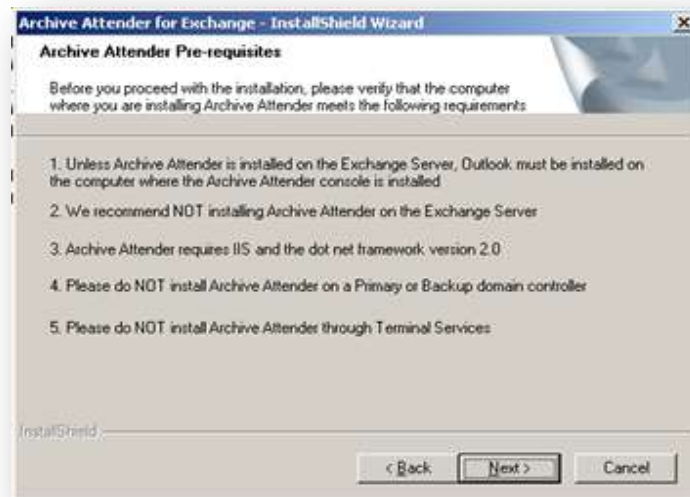
- 1) Please ensure that Dot Net Framework version 2.0 and Microsoft Internet Information Server are installed on the computer.
- 2) From the installer download, unzip it and double-click the Setup.exe file in the Archive Attender folder. Or, place the Archive Attender CD into your CD Drive; if it doesn't automatically launch, double-click Setup.exe to launch the installer.
- 3) The **Archive Attender Console Setup** screen will appear. Click the Next button to get to the License Agreement.



- 4) Review the license agreement. If you accept it, select the appropriate radio button and click Next.



- 5) Please review and ensure that you meet all the pre-requisites before proceeding with the installation.



- 6) From the **Components** screen, select the components that you would like to install.

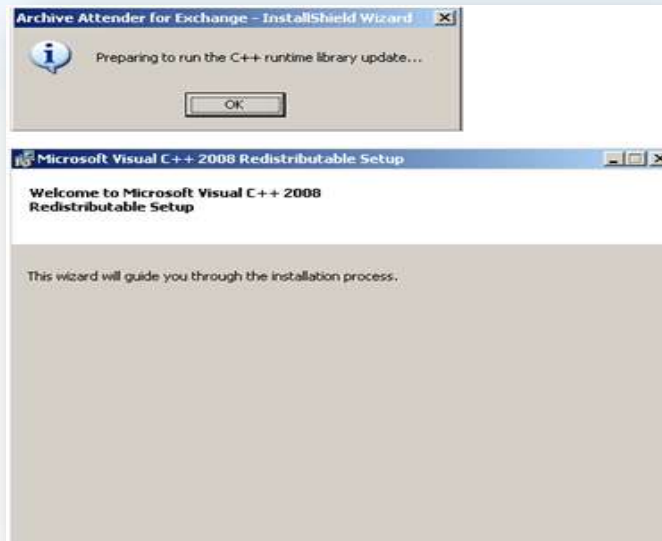


- 7) Browse for or enter the installation path in the **Choose Destination Location** window and click Next.

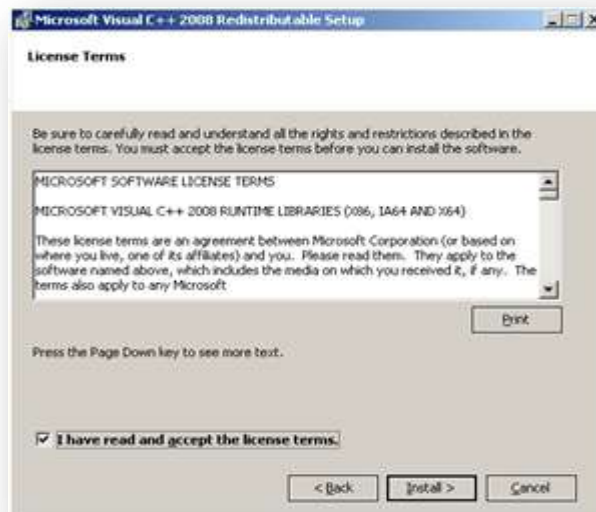


- 8) Archive Attender utilizes C++ components. In the next step you will be prompted to run the Microsoft 2008 C++ Redistributable that supports these components (if it is not already present on the Archive Attender server).

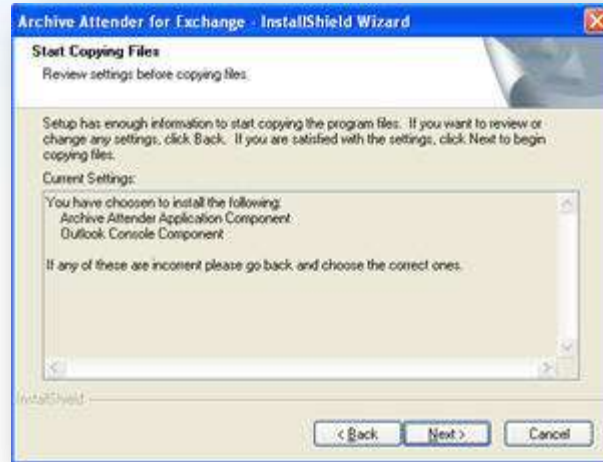
Click OK to proceed with installing the C++ runtime libraries



Click the checkbox to accept the Microsoft license terms then the Install button to continue with the C++ library installation.



Confirm the components to be installed in the **Start Copying Files** window and click the Next button.



- 9) The **InstallShield Wizard Complete** screen should appear after all the files have been copied. Click the Finish button.



- 10) At the conclusion of the installation, you will be prompted as the Archive Attender setup program is launched to complete the configuration of Archive Attender.
- 11) Click Next on the Welcome screen of the Archive Attender setup program.



- 12) The next screen of the setup program will prompt you for the account that will be used by the Archive Attender for Exchange service. This account must have full administrative rights to the mailboxes on the Exchange Server from where messages will be archived. The *Browse* button will allow you to browse Active Directory to locate the account that will be used for the service.



***Please refer to Microsoft knowledgebase articles Q821897 (for Exchange 2003) and Q262054 (for Exchange 2000) for help with setting up the account with appropriate permissions. Contact Sherpa for information on Exchange 2007 service account access.***

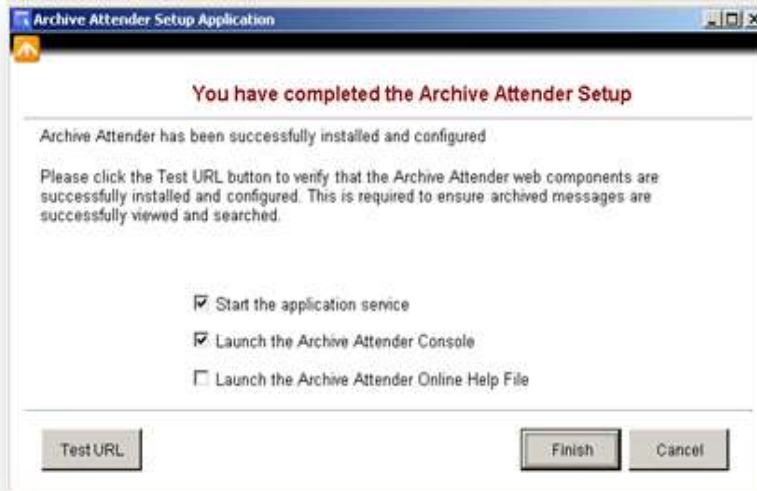
This account must also have read/write access to the archive locations where messages will be stored. Click Next after entering the Account details.

- 13) If you chose to install the Outlook Console component in the Components dialog of the installation program, you will now be prompted to enter the information required to configure the account used by the Archive Attender web application. This account must have full administrative rights to the local computer.



14) After entering the account details for the web application click Next.

You may choose to launch the Archive Attender console, start the Archive Attender service and open the online Help documentation. Click Finish to complete and close the setup program. Based on the options you chose, the appropriate applications will be launched.

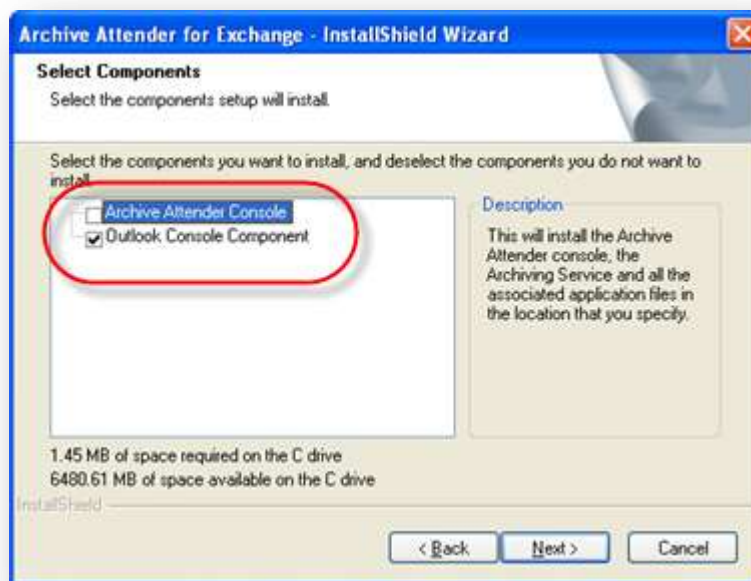


*The **Test URL** button will allow you to verify that the Archive Attender web applications are configured correctly. If so, you will see a web page with the current status of the Archive Attender Service*

## *Setting up Archive Attender for Outlook Web Access Users*

In a default installation of Archive Attender, the Archive Attender console, the service and the web application used to provide users access to their archived messages are all installed on the same computer. However, if you need to provide access to archived messages to users via Outlook Web Access (OWA), the Outlook Console component of Archive Attender must be installed on the computer that serves as the web server for users to access OWA from the internet. Generally this is the front-end Exchange Server in a front-end/back-end scenario.

To install Outlook Console component on the front-end server, please run the Archive Attender installation program on the front-end computer. You can follow the instructions in the Installing Archive Attender section of this document. When you get to the screen that prompts for the selection of components to install, please uncheck the Archive Attender Console option and select only the Outlook Console Component option.



Continue through the rest of the installation. At the conclusion of the installation, the Archive Attender setup program will be launched to configure the web application that was just installed.



Click Next to be prompted to configure an account to be used by the Archive Attender web application. This account must have full administrative privileges on the local machine.



The screenshot shows a window titled "Archive Attender Setup Application". The main heading is "Archive Attender Web Application Account". Below this, a message reads: "The credentials entered here will be used by the Archive Attender Web application. This account must have full local administrative rights to this computer". There are three input fields: "User Name:", "Password:", and "Confirm Password:". To the right of the "User Name:" field is a "Browse..." button. At the bottom right, there are two buttons: "Next" and "Cancel".

Click Next after entering the account information. You will now be prompted to enter the name or IP address of the computer where the Archive Attender console is installed.



After entering the requested information, click Next. This completes the setup of the Outlook Console component on the front-end server.



Click Finish to exit the setup program.

## Starting the Archive Attender Console and Help

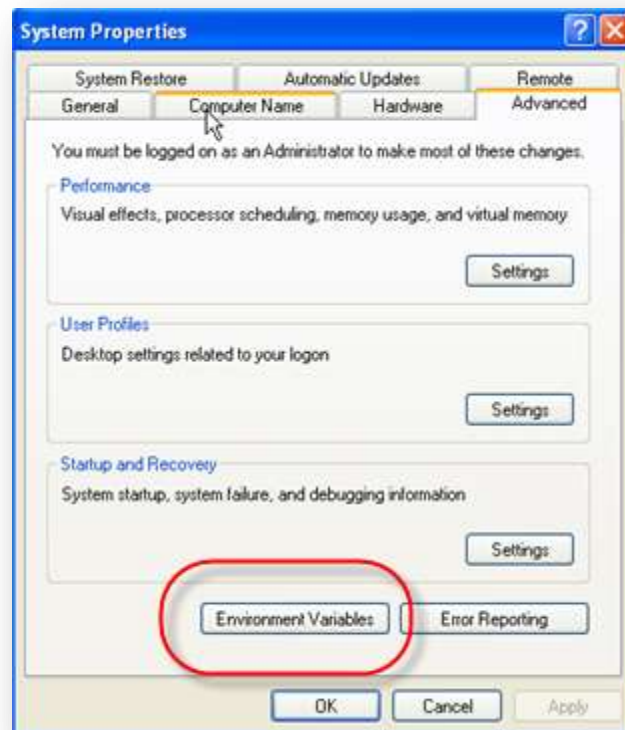
To access the Archive Attender console, click the Start Menu, navigate to Program Files\Archive Attender for Exchange and select the Archive Attender for Exchange Console. The context sensitive online help documentation provides extensive information to assist you with configuring the application. Help information can be viewed by pressing F1 while in the console or by selecting Archive Attender for Exchange Help in the program folder location.

## Installation Exceptions

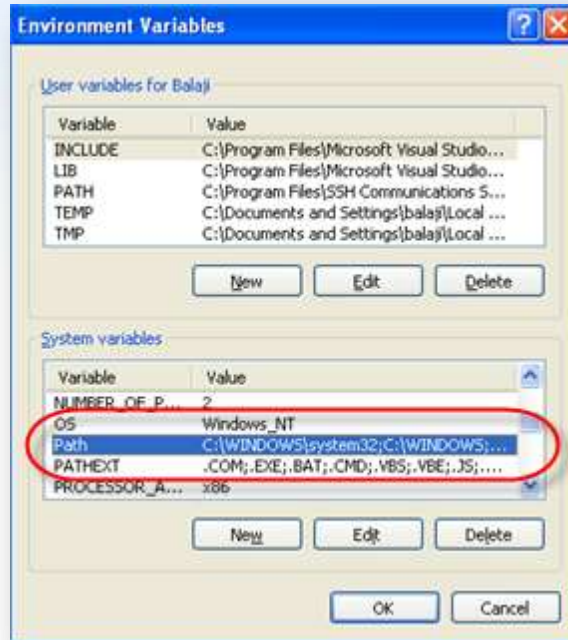
The tasks outlined in this section are generally performed by the Archive Attender setup program. However, if the setup program encounters an error, you may need to perform some (or all) of the following steps manually

### Manually Adding Archive Attender to the System Path

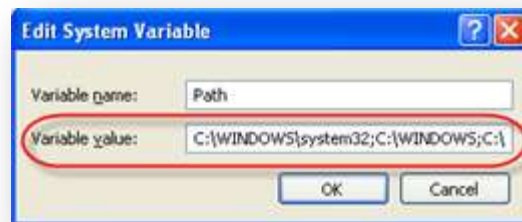
In order for the search of the archives to function correctly, the installation path of the Archive Attender application must be added to the system path of the Archive Attender console computer. To add the path, please navigate to the Control Panel on the Archive Attender computer, launch the System applet and click on the Advanced tab



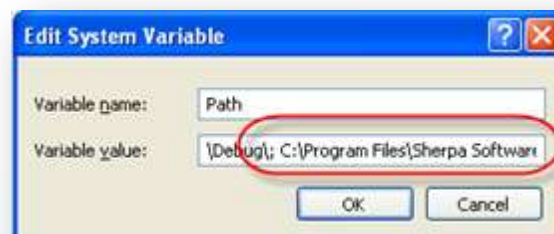
Click the Environment Variables button. This will display a screen with a list of User variables and a list of System variables.



In the System Variables list, navigate to the Path variable, highlight it and click Edit.



Check the paths in the Variable Value field. If you do not see the path to the Archive Attender installation directory, place your cursor at the end of the string in the Variable value field. Add a semi-colon (;) to de-limit the new path from the other paths in the field. Then type in the path to the installation directory of Archive Attender (the default path is c:\Program Files\Sherpa Software Group\Archive Attender for Exchange).



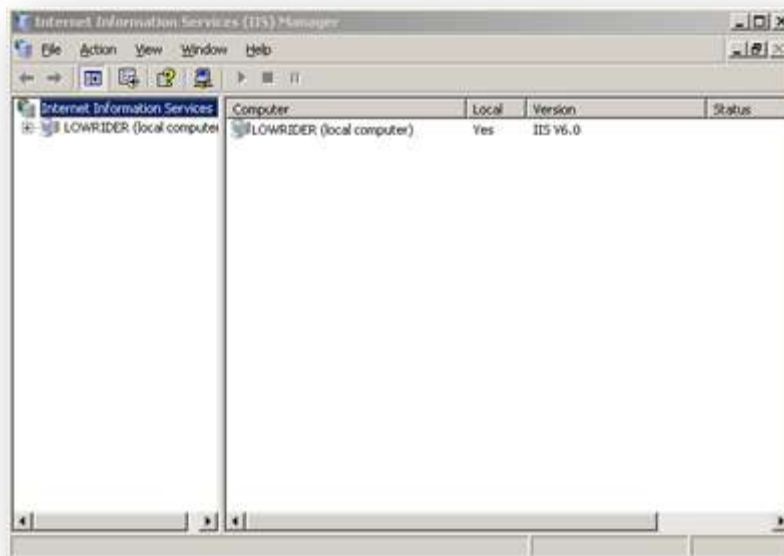
The system path variable has been configured.

## Manually Create the Archive Attender Web Application

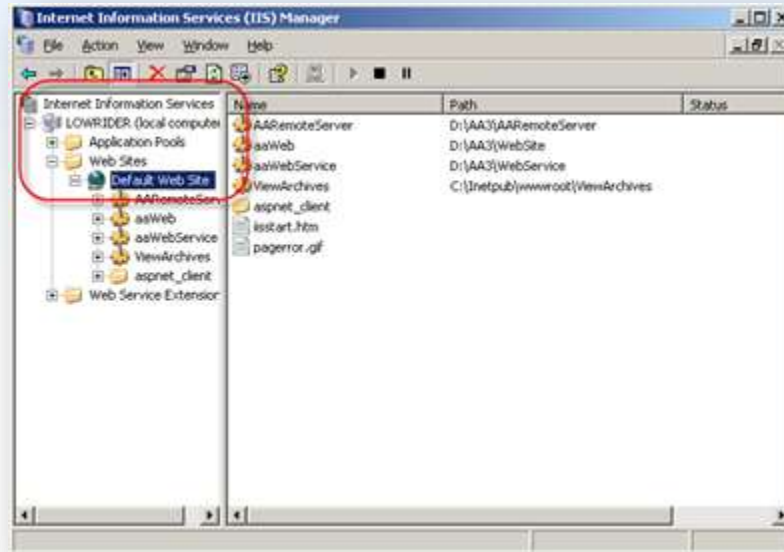
The Archive Attender web application (also referred to as the Outlook Console Component) provides an interface that offers end-users the ability to search and access their archived messages. This web application is generally automatically created and configured by the Archive Attender setup program. However, if the setup application encounters an error, the creation of the web application is aborted and you will have to manually create and configure it.

The following screens display the options available in Internet Information Server (IIS) version 6.0. If your installation of IIS is version 5.0, although some of the screens may look a slightly different, the options that need to be configured are available in 5.0 as well.

On the computer where the web application is installed, please navigate to the Control Panel and then Administrative Tools. Launch the Internet Information Service applet.



Navigate from the root of the menu to the Default Web Site option. Click the “+” sign next to it to display the list of websites currently configured on the Default Web Site.



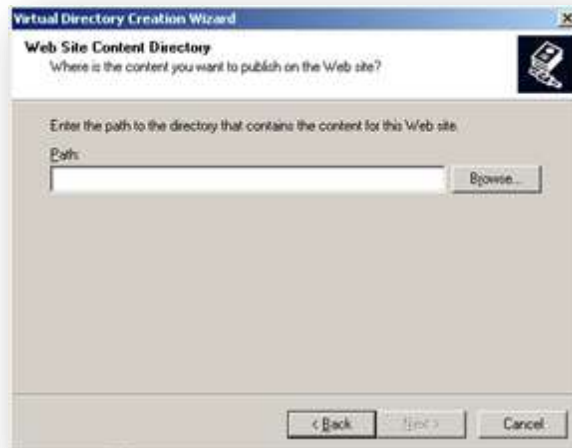
Right-click the Default Web Site and choose the New Virtual Directory option. This will launch the wizard to create a new web application.



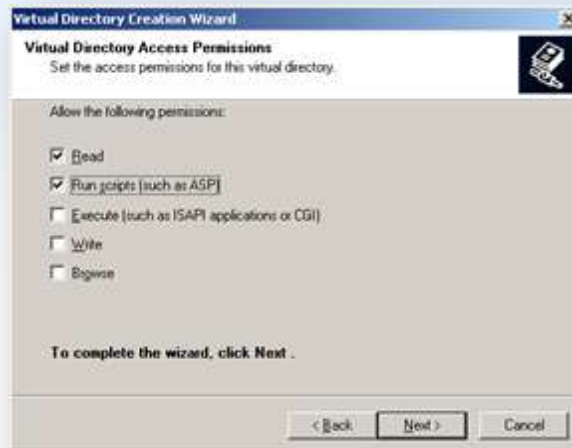
Click Next and enter the name aaWeb in the Alias field on the next screen. Click Next.



On the next screen browse to or type in the path to the WebSite directory found in the Archive Attender 3.x installation folder. The default Archive Attender 3.x installation directory is C:\Program Files\Sherpa Software Group\Archive Attender for Exchange. Click Next.



Please ensure that the Read and Run Scripts (such as ASP) option is checked on the next screen. Click Next.



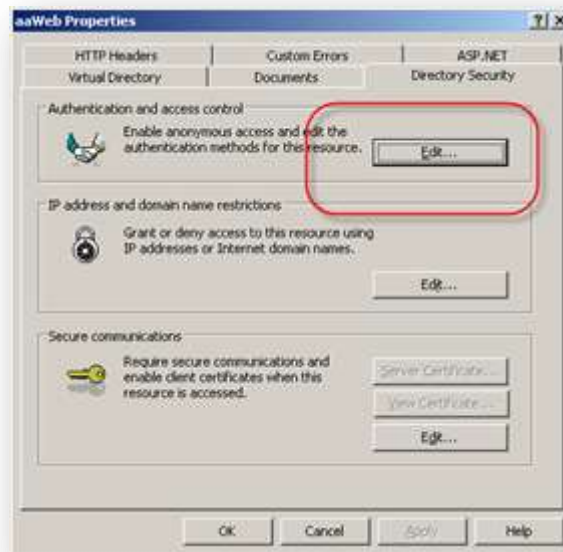
The web application has now been created. Click Finish to close the wizard.



To configure the appropriate options for the aaWeb web application, right-click the aaWeb option under the Default Website and click on the Properties option.



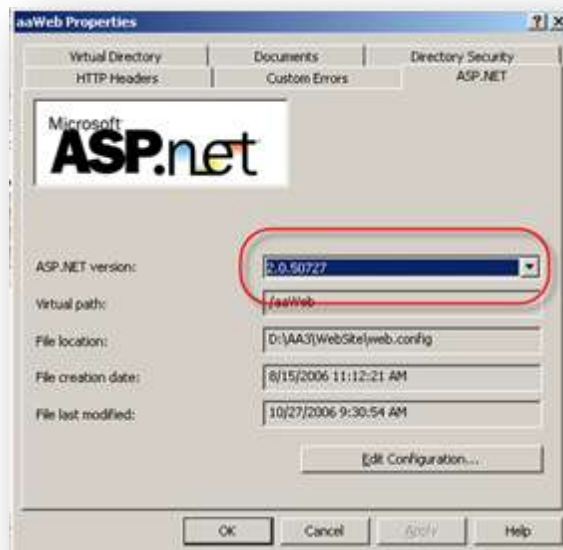
Navigate to the Directory Security tab of the aaWeb Properties window and click the Edit button in the Authentication and Access Control section.



Please make sure that the Enable anonymous access option is checked. Also modify the account used for anonymous access to an account that has complete local administrative privileges.



Re-enter your password to confirm and click OK to save the account details. Back on the Properties screen, click on the ASP.NET tab. Click the ASP.NET Version dropdown and select the value 2.0.50727. Click Apply and OK to save your changes.



The Archive Attender web application is now configured.



## Manually Create the Archive Attender Web Service Application

The aaWebService web application serves as a web equivalent of the Archive Attender service handling processing requests made by the user through Outlook and Outlook Web Access. This web application is generally automatically created and configured by the Archive Attender setup program but if errors are encountered during the automated setup the creation of this web application is aborted. In that case, you will have to configure this web application manually.

The steps to create and configure the aaWebService application are identical to the steps outlined in the previous section to configure the Archive Attender Web Application. The only two differences are:

- after you launch the wizard, when you are prompted for the Alias for the website, please enter aaWebService.
- when entering the path to the directory that contains the files for this website, please enter the path to the WebService directory located in the Archive Attender installation directory. The default location for Archive Attender is C:\Program Files\Sherpa Software Group\Archive Attender for Exchange.

The rest of the setup for the aaWebService application is exactly the same as for the aaWeb application discussed in the previous section.



## Uninstalling Archive Attender

To uninstall Archive Attender, open the Control Panel, go to the Add/Remove Programs window, and choose Archive Attender from the list. You can also re-run the setup program from the CD and choose the Remove option.

If you have any difficulties installing or uninstalling Archive Attender, please contact Sherpa Software.

## Troubleshoot Problems Accessing Stub Messages

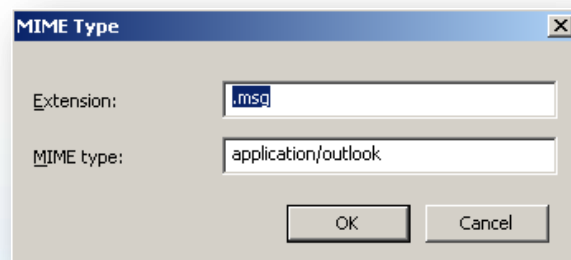
The retrieval of messages via stubs left in Outlook requires a web service running under IIS. Errors encountered when a link within a stub message is clicked can generally be attributed to configuration or permission based issues within IIS. Although the Archive Attender setup program attempts to test for and resolve these settings, IIS occasionally does not persist these changes. Please follow the checklist below to verify the IIS settings.

1. Please launch a browser on the Archive Attender computer and navigate to the following URL: <http://SERVER/aaweb/default.aspx> where SERVER is the NETBIOS name or IP address of the Archive Attender computer. You should see a screen something like this:



Certain operating system setups may prevent a registry key from being initialized during the install of AA. This is a way to circumvent that issue. If you do see a screen similar to this, please try the stub again. If it still fails, continue on with the following steps.

2. If you are using IIS 6.0, please check that the Status of the ASP.NET v2.0x web extension is set to Allowed. You can verify this by launching the IIS manager, navigating to the Web Service Extensions and reviewing the list of extensions.
3. Edit the properties of the aaWeb and aaWebService web applications under the Default Web Site node in the IIS manager, click on the ASP.Net tab and verify that they are both set to use a version of ASP.NET 2.0. The current version of the 2.0 framework is 2.0.50727.
4. If you are using IIS 6, please launch the IIS Manager, right-click the computer name node and select Properties. Click the MIME Types list. If .msg is missing from the list of MIME types, add a new MIME Type to look as below. Select OK to return to the properties screen





5. Please verify that the aaWeb web application under the Default Web Site has default.aspx listed in the Default Documents list in the Documents tab of the Properties dialog.
6. Verify that the Default Web Site is set to listen on port 80 (Web Site tab of the Properties dialog).
7. Check to make sure that the following registry path has at least one valid URL to the aaWebService web application running on the Archive Attender computer:  
HKLM\SOFTWARE\Sherpa Software Group\Archive Attender for Exchange\Web\Services
8. The aaWebService must have Anonymous Access turned on and running under the same account as the Archive Attender for Exchange Service.
9. Make sure that the Network Service account has read/write privileges to the C:\WINDOWS\Microsoft.NET\Framework\v2.0.50727\Temporary ASP.NET Files folder.



## Contacting Sherpa Software

For more information, please contact Sherpa Software. General phone support for installation is available Monday through Friday from 8:30am to 5pm EST. Additional customer support is available through an annual maintenance and support agreement.

**Sherpa Software Partners L.P.**  
456 Washington Ave. Suite 2  
Bridgeville, PA 15017

Toll-free: 800.255.5155  
Phone: 412.206.0005  
Fax: 412.206.0018  
[information@sherpasoftware.com](mailto:information@sherpasoftware.com)

[www.sherpasoftware.com](http://www.sherpasoftware.com)