Enterprise Vault.cloud™ CloudLink Google Account Synchronization Guide

CloudLink 4.0.1 to 4.0.3

VERITAS™

Enterprise Vault.cloud: CloudLink Google Account Synchronization Guide

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Contents

About this guide

This chapter includes the following topics:

- About this guide

- Prerequisite knowledge

About this guide

This guide describes how to use Veritas™ CloudLink to synchronize accounts from Active Directory to Enterprise Vault.cloud, to support the archiving of Gmail messages from Google G Suite Enterprise.

The guide describes how to install and configure CloudLink for the purposes of Google account synchronization, and then how to:

- Synchronize the required Microsoft Active Directory accounts in Enterprise Vault.cloud.

- Enable and disable users' access to their Personal.cloud archive.

- Use CloudLink to send welcome messages to Personal.cloud users.

Prerequisite knowledge

You should be an administrator who is experienced in managing Active Directory and Google G Suite Enterprise.

Google account synchronization overview

This chapter includes the following topics:

- Release history: CloudLink support for Google account synchronization
- About Google account synchronization with CloudLink

Release history: CloudLink support for Google account synchronization

Table Table 2-1 provides details of the versions of CloudLink that support Google account synchronization.

Table 2-1   Versions of CloudLink with Google account synchronization support

CloudLink version	Release Date	Changes
CloudLink 4.0.3	April 2018	The region names have changed in the configuration options for selecting the Enterprise Vault region. For more information on the changed data center naming in this release, see the *CloudLink Administration Guide*. If you are using CloudLink 4.0.1 or 4.0.2 for Google account synchronization there is no requirement to upgrade to 4.0.3.

Table 2-1   Versions of CloudLink with Google account synchronization support *(continued)*

CloudLink version	Release Date	Changes
CloudLink 4.0.2	January 2018	This version adds support for the Enterprise Vault.cloud US-US3 region data center.
CloudLink 4.0.1	January 2017	This version was the first to include the CloudLink Google Sync feature, which can provision accounts for Google G Suite Enterprise Gmail message archiving. This functionality is for use in environments where you manage your Google G Suite Enterprise users and groups from Microsoft Active Directory.

About Google account synchronization with CloudLink

CloudLink simplifies Enterprise Vault.cloud archive account provisioning by synchronizing directory user accounts with Enterprise Vault.cloud. CloudLink can also send welcome email messages to users that it has synchronized, informing them of their Personal.cloud archive and how to access it.

CloudLink now includes a Google account synchronization feature, "Google Sync". This feature is typically for use in environments where you manage Google G Suite Enterprise users and groups from Microsoft Active Directory, and where you use the Google Cloud Directory Sync tool (GCDS) to synchronize the Active Directory users and groups to your Google G Suite domain. For more information about GCDS see the following article from Google's G Suite Administrator Help: https://support.google.com/a/answer/106368?hl=en.

With CloudLink you can create a Google Sync task to synchronize to Enterprise Vault.cloud the same set of Active Directory users and groups that you have synchronized to G Suite using GCDS.

Figure 2-1   Active Directory account synchronization with GCDS and
                      CloudLink
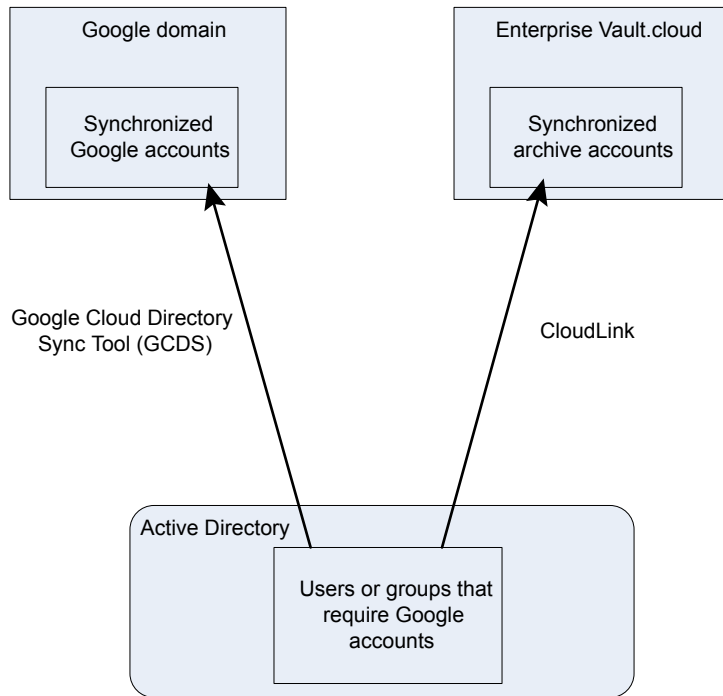
Every time you run the GCDS tool to synchronize Active Directory users to G Suite,
you should aim to run a CloudLink Google Sync task to perform an equivalent
synchronization to Enterprise Vault.cloud. You should coordinate the runs of the
GCDS tool and the CloudLink Google Sync task, so that the Enterprise Vault.cloud
archive accounts keep in step with the Google accounts.

CloudLink requirements

This chapter includes the following topics:

- Requirements for Google account synchronization with CloudLink

- Compatible Active Directory versions

- CloudLink server requirements

Requirements for Google account synchronization with CloudLink

To perform Google account synchronization you require CloudLink version 4.0.1 or later.

Note: If you use CloudLink for Exchange or Domino account synchronization, you must install a separate instance of CloudLink for Google account synchronization.

Read about the requirements for Google account synchronization before you proceed with the installation.

- See "Compatible Active Directory versions" on page 10.

- See "CloudLink server requirements" on page 11.

Compatible Active Directory versions

The CloudLink Google Sync feature is compatible with Microsoft Active Directory in the following versions of Windows Server:

- Windows 2003

- Windows 2003 R2

- Windows 2008
- Windows 2008 R2
- Windows 2012 R2

CloudLink server requirements

For optimal performance we recommend that you install the CloudLink application on a standalone server or virtual machine. We recommend that you do not install CloudLink on an Active Directory domain controller, due to the potential effect on performance.

Note: If you use CloudLink for Exchange or Domino account synchronization, you must install a separate instance of CloudLink for Google account synchronization.

Table 3-1 specifies the other requirements for the server on which you run CloudLink.

Table 3-1　　　CloudLink server requirements for Google Sync

Item	Requirement
Operating system	One of the following: - Microsoft Windows Server 2008 with SP2 (32-bit and 64-bit) - Microsoft Windows Server 2008 R2 with SP1 (64-bit) - Microsoft Windows Server 2012 R2 (64-bit) **Note:** You must either turn off User Account Control (UAC), or run CloudLink as an Administrator.
CPU	Multi-core x86 or x64 processor
Memory	16 GB RAM
Microsoft .NET Framework	Microsoft .NET Framework 4.0
Server/network account permissions	To install the CloudLink application you require Local System Administrator permissions.

Table 3-1 CloudLink server requirements for Google Sync *(continued)*

Item	Requirement
Internet connectivity	During the installation, CloudLink requires Internet connectivity to access and install the required version of SQL Server Compact.
	When in use, CloudLink requires Internet connectivity to perform synchronizations to Enterprise Vault.cloud. CloudLink uses the system default Internet proxy settings.
	If your CloudLink server routes network traffic through a proxy server, ensure that the CloudLink service account has permission to connect to the data center website for your Enterprise Vault.cloud geographical region. All traffic is on port 443.
	You can obtain the data center URL for your Enterprise Vault.cloud geographical region from Veritas Services & Support.
Network access	When in use, CloudLink requires network access to your Active Directory.

Setting up CloudLink for Google account synchronization

This chapter includes the following topics:

■ Reviewing or changing the CloudLink configuration

About setting up CloudLink for Google account synchronization

Follow these instructions to install and configure CloudLink for Google account synchronization.

Preparing the required accounts

During the configuration of CloudLink you are prompted to enter the credentials for the following accounts:

■ An Enterprise Vault.cloud Administration Console login account: This account must have the System Administrator administration role in the Enterprise Vault.cloud Administration Console.

■ The CloudLink service account: The ArchiveTools CloudLink Server service runs under this Windows service account to access Active Directory. Follow the instructions below to create a suitable account.

To create the CloudLink service account

1 Create a Windows domain user account with a non-expiring password.

2 Add the account to the local Administrators group on the computer on which CloudLink is to be installed.

3 Add the account to the Domain Admins group.

Installing CloudLink

You must install the CloudLink application on a computer that has the required prerequisites.

See "CloudLink server requirements" on page 11.

Note: If you use CloudLink to perform Exchange or Domino account synchronization, you must set up a separate instance of CloudLink to perform Google account synchronization.

To install CloudLink

1 Download the required version of the compressed CloudLink installation file from the following location on the Veritas Support website:

https://www.veritas.com/docs/100014012

2 Extract the files from the CloudLink compressed file.

3 Go to the uncompressed files folder and begin the installation in one of the following ways:

- If Windows User Account Control (UAC) is turned on you must run the installation as an administrator. Hold down Shift while you right-click the file `PreInstall.exe`, and then select **Run as administrator** from the shortcut menu.

- Otherwise, double-click the file `PreInstall.exe`.

4 Follow the CloudLink setup wizard.

When the installation has completed, the ArchiveTools CloudLink icon is present on the Windows desktop.

Editing the CloudLink configuration file to enable the Google Sync options

Before you can use CloudLink for Google account synchronization you must edit its configuration file to enable the additional user interface options.

To edit the CloudLink configuration file to enable the Google Sync options

1 Make sure that the CloudLink application is not running.

2 Go to the folder in which CloudLink is installed, typically **C:\Program Files\ArchiveTools\CloudLink**.

3 Make a backup copy of the CloudLink configuration file **ArchiveTools.CloudLink.Server.exe.config**, in case you want to revert to the original file later.

4 Use a text editor such as Notepad to open **ArchiveTools.CloudLink.Server.exe.config**.

5 Find the **<appSettings>** section of the file, and locate the following entry within it:

```
<add key="GoogleSyncEnabled" value="0" />
```

The value of this key is an integer that determines whether the CloudLink user interface displays or hides the Google Sync options.

6 To display the Google Sync options, change the value to `1` so that the line reads as follows:

```
<add key="GoogleSyncEnabled" value="1" />
```

7 Save the changes to the configuration file.

8 Restart the **ArchiveTools CloudLink Server** service for the change to take effect.

How to start and close the CloudLink application

CloudLink must run with elevated privileges if User Account Control (UAC) is enabled. The following start procedure explains how you can run CloudLink as an administrator, if required.

To start the CloudLink application

◆ Do one of the following:

■ Launch CloudLink from the CloudLink desktop shortcut.

Note: If Windows User Account Control (UAC) is turned on, you must run CloudLink as an administrator. Hold down Shift while you right-click the desktop shortcut, and then select **Run as administrator**.

■ Or go to **Start** > **Programs** > **ArchiveTools CloudLink**. The **ArchiveTools CloudLink** option launches CloudLink.

Note: If Windows User Account Control (UAC) is turned on, you must run CloudLink as an administrator. Hold down Shift while you right-click the **ArchiveTools CloudLink** option, and then select **Run as administrator** from the shortcut menu.

To close the CloudLink application

◆ Close the CloudLink window.

Overview of configuring CloudLink for Google Sync

Before you can create tasks for Google account synchronization ("Google Sync") you must configure CloudLink to work with Enterprise Vault.cloud and your Active Directory environment.

Table 4-1 lists the steps you need to perform when you run the CloudLink configuration wizard for Google account synchronization.

Table 4-1 CloudLink configuration steps for Google account synchronization

Configuration step	Action	Reference
Select Configuration Task(s)	Select the configuration tasks that you need to perform. CloudLink builds a list of additional configuration steps that you need to complete, based on your selections.	See "Selecting the CloudLink configuration tasks for Google account synchronization" on page 18.
Specify CloudLink Service Account	Provide the credentials of the prepared Windows service account.	See "Specifying the CloudLink service account" on page 21.
Register Domain Controller	Register a domain controller from each domain in the Active Directory forest from which you want to select the users or groups to synchronize.	See "Registering the domain controllers" on page 21.
Cloud Archive Credential	Specify the credentials for an Enterprise Vault.cloud Administration Console login account that has the System Administrator role.	See "Specifying the Administration Console account credentials" on page 22.
Configure Sync Properties	The settings are not applicable for Google account synchronization. You can ignore these settings and go on to the next configuration step.	See "Configuring the sync properties" on page 23.
Additional AD Sync Options	Determine what happens to Enterprise Vault.cloud archive accounts if the associated Active Directory account is disabled.	See "Configuring the additional AD synchronization options" on page 23.
Configure SMTP Server	Configure the details for email alerts that CloudLink sends if the CloudLink AD Sync services fail to synchronize any accounts.	See "Configuring the SMTP server settings for email alerts" on page 25.

| | Table 4-1 | CloudLink configuration steps for Google account synchronization *(continued)* | |

Configuration step	Action	Reference
Report Management	Configure the CloudLink log settings and report settings.	See "Configuring report management and logging" on page 25.
Welcome Message Template	If required, configure the template for Personal.cloud welcome email messages that CloudLink sends.	See "Configuring the welcome message template" on page 26.

Selecting the CloudLink configuration tasks for Google account synchronization

To begin the configuration of CloudLink, or to review or modify an existing configuration, you must select the required configuration tasks. CloudLink then takes you through the required configuration steps.

Some configuration steps are not relevant to Google account synchronization. Follow the procedure as outlined below.

Note: If you ran the configuration previously, you must reselect the required configuration tasks.

To select the CloudLink configuration tasks for Google account synchronization

1   Start CloudLink, if it is not already started.

2   Click the **Configuration** tab, near the bottom of the left pane.

The **Welcome to CloudLink** page shows the current configuration status of CloudLink. If you have performed any CloudLink configuration steps previously, the **Configuration Status** area lists any configuration steps that you have yet to complete.
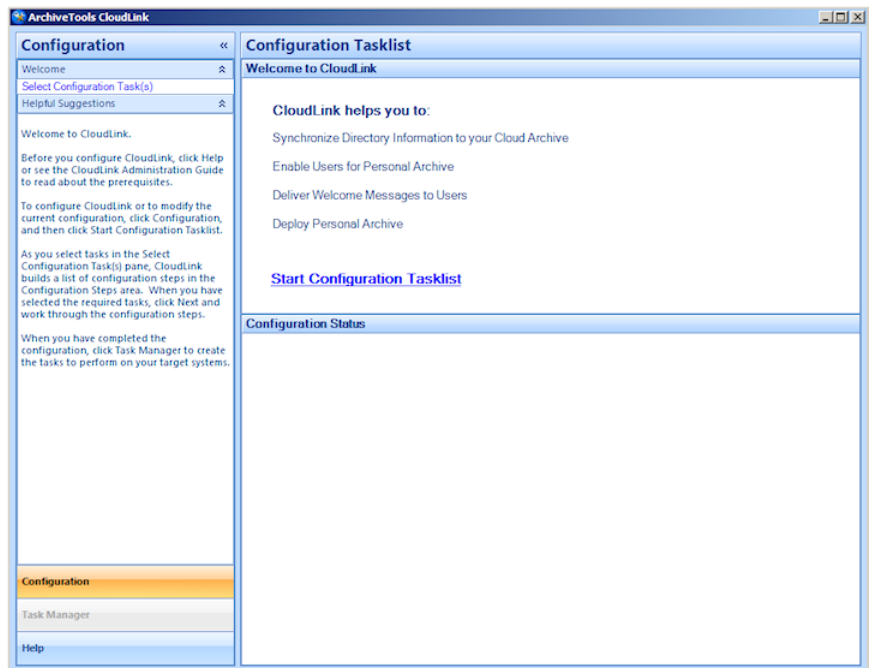
3   Do one of the following:

- Click **Select Configuration Task(s)** in the **Configuration** pane.

- Or click **Start Configuration Tasklist** in the **Configuration Tasklist** pane.

4   On the **Select Configuration Task(s)** page, select the required configuration tasks:

- For Google account synchronization select **Directory Synchronization Configuration**, and then select **Microsoft Active Directory Synchronization**.

Note: Do not select **Web Folder Management Configuration**. This option is not applicable for Google Sync.

- If you want CloudLink to be able to send welcome messages to users who receive Personal.cloud archives, select **Welcome Message Template**.
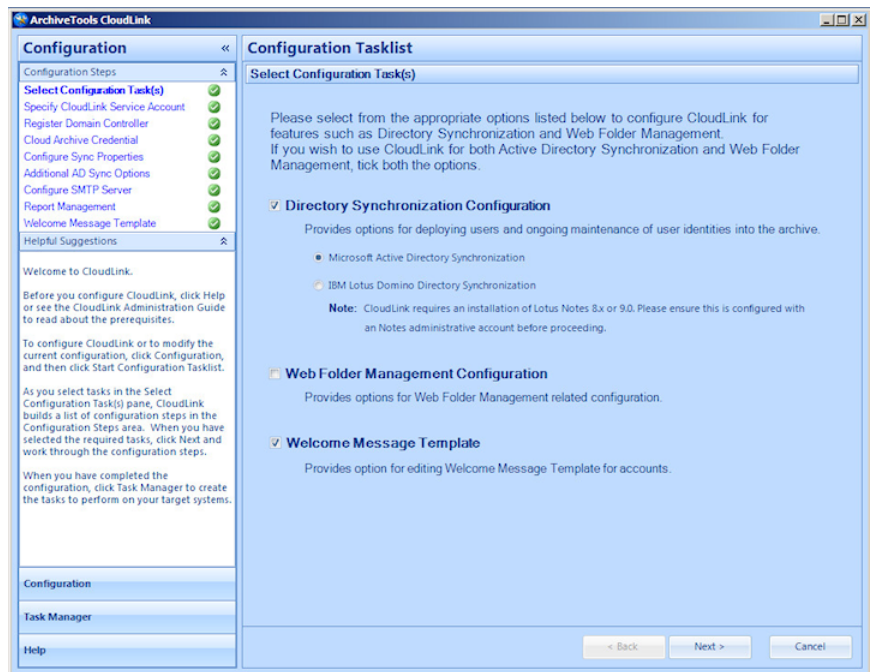
As you select options on the **Select Configuration Task(s)** page, CloudLink populates the **Configuration Steps** area dynamically with the required configuration steps.

5 Click **Next** to save your tasks and continue to the next configuration step.

Note the following about working through the CloudLink configuration steps:

- When you configure CloudLink for the first time, we recommend that you work through the configuration steps in the order in which CloudLink presents them. When you have completed a step, click **Next** at the bottom of the configuration page to go to the next configuration step.

- Alternatively you can navigate between steps by selecting any configuration step in the **Configuration Steps** area. However, some steps cannot be selected until earlier steps are successfully completed.

- CloudLink marks with a green checkmark icon any steps that you have successfully completed.

- When you have finished the configuration you can return to any step to change its values if necessary.

Specifying the CloudLink service account

In the **Specify CloudLink Service Account** configuration step you must provide the credentials of the account that the ArchiveTools CloudLink Server service is to run under.

The account must have the required permissions.

See "Preparing the required accounts" on page 14.

To specify the CloudLink service account

1   Go to the **Specify CloudLink Service Account** configuration step.

2   In the **Account** box, enter the name of the CloudLink service account.

Note: Enter the account name in the format `Domain\Username`.

You can click the Address Book icon to search for users in a selected domain.

3   In the **Password** box, type the password for the CloudLink service account.

4   In the **Confirm Password** box, re-type the password for the CloudLink service account.

5   To validate the account credentials, you can click the validate account icon that is adjacent to the **Account** box.

6   Click **Next** to continue to the next configuration step.

CloudLink changes the logon account for the ArchiveTools CloudLink Server service to the account that you specified.

Registering the domain controllers

In the **Register Domain Controller** configuration step you must register a domain controller from each domain in the Active Directory forest from which you want to select users or groups to synchronize.

To register the Active Directory domain controllers

1 Go to the **Register Domain Controller** configuration step.

2 By default, CloudLink uses the CloudLink service account to connect to the Active Directory forest. If the CloudLink service account is not part of the forest where the user accounts reside, do as follows:

- Clear the **Use current system account** check box.

- In the **Forest Name** box, enter the root domain name.

- In the **Username** and **Password** boxes, enter the credentials of a Domain Administrator for the specified domain.

- Click **Search Domain**. CloudLink then displays a list of domains and their domain controllers for the specified forest, in the drop-down lists.

3 In the **Domain** drop-down list, select a domain from which you want to synchronize user accounts with Enterprise Vault.cloud.

4 In the **Domain Controller** drop-down list, select a domain controller.

We recommend that you select the domain controller that is nearest to the CloudLink server, to aid performance.

5 Click **Add**.

6 If you cleared the **Use current system account** check box in step 2, CloudLink uses the credentials you specified in that step.

Otherwise, CloudLink displays a **Configure Domain Controller** dialog. Enter the user name and password of an account that is a member of the Domain Admins group in the domain, such as the CloudLink service account. Then click **Ok**.

CloudLink adds the selected domain and domain controller to the list in the **Registered Domain(s)** list.

7 Repeat steps 2 to 6 for each domain in the Active Directory forest from which you want to synchronize users with Enterprise Vault.cloud.

8 Click **Next** to save and continue to the next configuration step.

Specifying the Administration Console account credentials

In the **Cloud Archive Credential** configuration step you must specify the credentials of an Enterprise Vault.cloud Administration Console login account. The account

must have the System Administrator administration role in the Enterprise Vault.cloud Administration Console.

To specify the Administration Console account credentials

1   Go to the **Cloud Archive Credential** configuration step.

2   In the **Username** box, type the name of the Enterprise Vault.cloud Administration Console account.

3   In the **Password** box, type the password of the Enterprise Vault.cloud Administration Console account.

4   In the **Region** drop-down list, select your Enterprise Vault.cloud geographical region.

Your geographical region is specified in your Enterprise Vault.cloud welcome letter email. If you do not know the region to which you have been assigned, ask your Enterprise Vault.cloud support representative.

5   Click **Next** to save the account details and continue to the next configuration step.

Configuring the sync properties

The **Configure Sync Properties** settings are not applicable for Google Sync, so you can accept the default settings and move to the next configuration step.

To configure the sync properties

1   Do not change the supplied settings on the **Configure Sync Properties** page.

2   Click **Next** to continue to the next wizard page.

Configuring the additional AD synchronization options

The **Additional AD Sync Options** configuration step provides a number of settings to control whether CloudLink disables Personal.cloud login or both login and archiving under certain conditions. Note that some of these options do not apply for Google account synchronization.

The **Additional AD Sync Options** are as follows:

For user accounts disabled in Active Directory	This setting determines how a task performs when a previously synchronized account becomes disabled in Active Directory. The options are as follows:

- **Do nothing**: CloudLink makes no changes to the Enterprise Vault Personal.cloud login, or to the Enterprise Vault.cloud archiving settings for the user account.
- **Disable Enterprise Vault Personal.cloud Login**:CloudLink disables the Enterprise Vault Personal.cloud login for the user account. New emails continue to be archived for the account, and archived emails remain accessible for eDiscovery.
- **Disable Enterprise Vault.cloud Archiving and Login**: CloudLink disables the Enterprise Vault Personal.cloud login for the user account. New emails are not archived to the account. Archived emails remain accessible for eDiscovery. CloudLink names the account as follows:

  username-Disabled_On_*timestamp*

The default setting is **Disable Enterprise Vault Personal.cloud Login**.

This setting also determines the effect of the **Disable Archive** setting in CloudLink Task Manager.

See "Selecting the actions for a Google Sync task to perform" on page 45.

For user accounts deleted in Active Directory	This setting has no effect for Google Sync tasks.

Note: If a task synchronizes an account, and the account is then deleted in Active Directory, a subsequent task makes no changes to the archive account.

If necessary you can disable archive accounts manually from the Enterprise Vault.cloud Administration Console.

Note: CloudLink has no visibility of expired Active Directory accounts.

For user accounts leaving an Organizational Unit selected for synchronization	This setting has no effect for Google Sync tasks.

Note: If a task synchronizes an Organizational Unit, and a user then leaves that Organizational Unit, a subsequent task that targets the Organizational Unit makes no changes to the archive account.

If necessary you can disable archive accounts manually from the Enterprise Vault.cloud Administration Console.

To configure the additional Active Directory synchronization options

1   Go to the **Additional AD Sync Options** configuration step.

2   Choose the required option for the **For user accounts disabled in Active Directory** setting.

3   Ignore the settings for the other two options, as they have no effect for Google Sync tasks.

4   Click **Next** to save the settings and continue.

Configuring the SMTP server settings for email alerts

In the **Configure SMTP server** configuration step you can configure the SMTP server settings for email alerts that CloudLink sends if the CloudLink AD Sync services fail to synchronize any accounts.

Note: TLS is not supported for sending the email alerts.

To configure the SMTP server settings for email alerts

1   Go to the **Configure SMTP server** configuration step.

2   In the **Server Name/IP** box, enter SMTP server name or IP address of the SMTP server.

3   In the **Port** box, enter the port to use.

4   In the **Sender Email Address** box, enter the email address that failure alerts will be sent from.

5   In the **Recipient Email Address**s field, enter the email address that failure alerts will be sent to.

6   If the SMTP server requires authentication, select the **SMTP server requires authentication** check box, and then enter the required credentials for authentication.

7   Click **Next** to save the settings and continue.

Configuring report management and logging

In the **Report Management** configuration step you configure the settings for CloudLink's reports and its log files.

See "About the CloudLink log files" on page 54.

To configure report management and logging

1   Go to the **Report Management** configuration step.

2   In the **Log Folder** box, enter the path to the folder where the CloudLink is to save its log files.

3   In the **Log Level** drop-down list, choose the log level. The log level options are as follows:

Low	Task logs and reports include warnings and errors for synchronization events. The default setting, recommended for typical use.
High	Task logs and reports include warnings, errors, and additional information about synchronization events. Use this setting to troubleshoot CloudLink issues.

4   In the **Save Last Report(s)** box, enter the number of previous reports and logs to be retained. The maximum setting is 25, which is also the default.

5   To complete the configuration, do as follows:

- If you selected the **Welcome Message Template** task in **Select Configuration Task(s)**, click **Next** to save the reports configuration and continue to the next configuration step.

- Otherwise, click **Finish** to save and finish the configuration. CloudLink returns you to the **Welcome to CloudLink** page.
  If the **Configuration Status** pane indicates that you still have configuration steps to complete, or if you want to change the configuration, you can rerun the configuration process and click **Next** to skip through any completed steps that you do not want to change.
  See "Reviewing or changing the CloudLink configuration" on page 28.

Configuring the welcome message template

In the **Welcome Message Template** configuration step you configure the template for the Personal.cloud welcome email messages that CloudLink sends.

Note: The **Welcome Message Template** configuration step is shown only if you selected the **Welcome Message Template** task on the **Select Configuration Task(s)** page.

To configure the welcome message template

1 Go to the **Welcome Message Template** configuration step.

2 In the **From** box you can change the displayed sender address if required.

3 In the **Subject** box you can change the default subject of the message if required.

4 In the **Body** box you can change the default message body to suit your requirements.

Note: CloudLink replaces the **{username}** and **{password}** tags with the user name and the temporary password that give initial access to Personal.cloud. Do not remove these tags unless you use Active Directory Federation Services (ADFS). If you use ADFS you must remove these tags and change the supplied URL to specify the appropriate application login URL. If you use ADFS you should also add a note in the body to explain that the user must use their normal Active Directory network password to log in to Personal.cloud.

To insert a hyperlink in the message body, do as follows:

- Select the text to be linked.

- Click the hyperlink button in the toolbar of the **Welcome Message Template** page.

- In the **Create Link** dialog box, select **http** or **https** from the drop-down menu.

- In the adjacent text box, type the required URL.

- Click **Ok**.

5 Click **Finish** to save and finish the configuration. CloudLink returns you to the **Welcome to CloudLink** page.

If the **Configuration Status** pane indicates that you still have some configuration steps to complete, or if you want to change the configuration, you can rerun the configuration process and click **Next** to skip through any completed steps that you do not want to change

See "Reviewing or changing the CloudLink configuration" on page 28.

Reviewing or changing the CloudLink configuration

If required you can rerun the CloudLink configuration process to check or change the existing settings, or to perform any incomplete steps.

To review or change the CloudLink configuration

1   In the CloudLink user interface, click the **Configuration** tab near the bottom of the **Configuration** pane.

    The **Configuration Status** area on the **Welcome to CloudLink** page shows the current configuration status of CloudLink.

2   Click **Select Configuration Task(s)** in the **Configuration** pane.

3   On the **Select Configuration Task(s)** page, reselect the configuration tasks. CloudLink does not store your previous selections.

    CloudLink displays the associated list of configuration steps. The steps that are completed are marked with a green check mark icon.

4   To complete an incomplete configuration, or to change the settings for any configuration steps, click **Next** on the **Select Configuration Tasks** page, and work though all the configuration steps. Click **Next** to skip through any steps that require no changes.

    You can also view or change the settings of a particular step by clicking that step in the **Configuration Steps** list.

Creating CloudLink tasks for Google Sync

This chapter includes the following topics:

About creating CloudLink tasks for Google Sync

When you have completed the configuration of CloudLink, you can create and manage tasks to perform synchronization actions between your Active Directory Google accounts and Enterprise Vault.cloud

You should create a CloudLink Google Sync task to synchronize to Enterprise Vault.cloud the same Active Directory users and groups that you have synchronized to G Suite Enterprise with GCDS.

Every time you run the Google Cloud Directory Sync (GCDS) tool to synchronize Active Directory users to G Suite, you should aim to run a CloudLink Google sync task to perform an equivalent synchronization to Enterprise Vault.cloud. It is your responsibility to coordinate the runs of the GCDS tool and the CloudLink Google sync task, so that the Enterprise Vault.cloud accounts keep in step with the G Suite accounts.

You create tasks in the CloudLink Task Manager, from where you specify:

■ The Active Directory users, groups, or Organizational Units to act on

■ The synchronization actions to perform

Google Sync tasks run only once. They cannot be scheduled to run recurrently. If you want to repeat a task's actions you can copy or edit the completed task in Task Manager, and then run the copy.

Note the following important points regarding CloudLink's Google Sync tasks:

■ If a task synchronizes an account, and the account is then deleted in Active Directory, a subsequent task makes no changes to the archive account.

■ If a task synchronizes an Organizational Unit, and a user then leaves that Organizational Unit, a subsequent task that targets the same Organizational Unit makes no changes to the archive account.

If necessary you can disable archive accounts manually from the Enterprise Vault.cloud Administration Console.

Accessing Task Manager

CloudLink's Task Manager is available once you have configured CloudLink.

To access Task Manager

1   If the CloudLink application is not already started, start it.

2   Click the **Task Manager** tab near the bottom of the left pane.

Note: The **Task Manager** tab is available only if you have completed some CloudLink configuration steps.

CloudLink displays the **Welcome to Task Manager Wizard** page.

About the Task Manager Welcome page and the Archive User Browser

The **Welcome to Task Manager Wizard** page can show information about the following:

- The Active Directory users that you have selected for CloudLink to synchronize to Enterprise Vault.cloud.

- All the users in the Active Directory domains that you have registered with CloudLink.

- The CloudLink tasks that you have created.

- The status of account synchronizations.

The **Welcome to Task Manager Wizard** page is also the place from which you launch the Task Manager wizard.

Archive User Browser

The **Archive User Browser** pane shows information about the users that are associated with the Active Directory domain that is selected in the **Archive User Browser** menu bar.

Note: The displayed information relates to when you last started CloudLink, or when you last refreshed the Archive User Browser.

The Archive User Browser can show information from either of two separate sources:

- By default, the Archive User Browser shows information about the users and groups that you have selected for CloudLink to synchronize to Enterprise Vault.cloud. When you start CloudLink, CloudLink reads its local database to obtain this information. To refresh this data, click the **Refresh** drop-down on the **Archive User Browser** menu bar, and select **Refresh from Database**.

  Note: When you create a task, CloudLink adds the users to its database as soon as you select them. The database can therefore include users for which synchronization has not yet occurred.

- The Archive User Browser can also show information for all of the mail-enabled users and groups in the selected Active Directory domain. To view this information, click the **Refresh** drop-down on the **Archive User Browser** menu bar, and select **Refresh from Active Directory**.

  Note: A refresh with data from Active Directory may take some time, depending on the size of your Active Directory deployment.

Table 5-1 shows the information that the Archive User Browser displays for each user.

Table 5-1   Information shown in the Archive User Browser

Column	Description
Username	The login name of the user.
Email Address	The primary email address of the user.
Archive Active	**Yes**: Archiving is set to enabled.
	No: Archiving is set to disabled.
Cloud Archive Status	**Yes**: A synchronization event has occurred.
	No: A synchronization event has not occurred.
Personal Archive	**Yes**: Access to Personal.cloud is set to enabled.
	No: Access to Personal.cloud is set to disabled.

Table 5-1   Information shown in the Archive User Browser *(continued)*

Column	Description
Web Folder	**Yes**: A Personal.cloud web folder is set to enabled.
	No: A Personal.cloud web folder is set to disabled.
	Note: Web folders are not applicable to Google Sync tasks.
Keep Archive Enabled	**Yes**: Archiving is set to enabled if the user is disabled in Active Directory.
	No: Archiving is set to disabled if the user is disabled in Active Directory.
Last Synchronized	The date and time of the last synchronization event.

Note: Remember that the information dates from when you last started CloudLink, or when you last refreshed the Archive User Browser.

You can export the details of the users and groups that are listed in the Archive User Browser to a CSV (comma-separated values) file.

See "Exporting archive account information from the Archive User Browser" on page 56.

Created Task List

The **Created Task List** area lists all the tasks that currently exist. The list is empty until you create and run some tasks. You can copy and edit existing tasks from the **Created Task List**.

See "Viewing the Created Task List" on page 49.

Task Manager Logging

The **Task Manager Logging** area posts information about Enterprise Vault.cloud synchronizations as they happen, and provides links to the task reports and the CloudLink logs.

See "Viewing the task reports" on page 53.

Creating CloudLink tasks for Google Sync

When you have completed the configuration of CloudLink, you can create one or more tasks that define a set of actions for CloudLink to perform on Active Directory accounts.

Table 5-2 lists the steps that are required to create a task for Google Sync. The Task Manager wizard takes you through the process.

Table 5-2 Creating a CloudLink task

Action	Reference
Select the Active Directory users, groups, or Organizational Units on which to perform the task.	See "Selecting users, groups, or OUs to synchronize" on page 34.
Allow remote account management by CloudLink, if required.	See "About granting remote account management for CloudLink" on page 44.
Select the actions for the task to perform.	See "Selecting the actions for a Google Sync task to perform" on page 45.
Deselect actions for specific users, if required.	See "Deselecting task actions for specific users or groups" on page 47.
Name and run the task.	See "Naming and launching the task" on page 47.

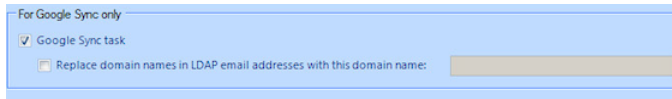# Selecting users, groups, or OUs to synchronize

You must use the Task Manager Wizard to select the users, groups, or Organizational Units (OUs) on which to perform a Google Sync task.

Note: The Archive User Browser cannot be used to select the targets for Google Sync tasks.

You can use any of the following selection methods:

- Selecting all of the users and groups in a domain

- Selecting entire OUs, or users and groups from within OUs

- Selecting users with an LDAP query

- Selecting the members of a distribution group using Group-based Sync.

Whichever selection method you choose, make sure that you always select the **Google Sync task** check box on the first page of the Task Manager Wizard. You must also provide a replacement domain name if necessary. For more information on when to use a replacement domain name, see the following sections.

Selecting all of the users and groups in a domain

Note: Do not select all of the users and groups in a domain unless you are sure that is what you require. If you cause CloudLink to create a lot of unwanted archive accounts, you will either have to disable the unwanted archive accounts or incur the costs of the unwanted archiving.

To select all of the users and groups in a domain

1   At the bottom of CloudLink's left pane, click **Task Manager** to display the **Welcome to Task Manager Wizard** page.

2   Click **Start Task Manager Wizard**.

     The wizard's **Select User(s) or Group(s)** step appears.

3   In the **Select Domain** drop-down list, select the required domain.

4   Select **Synchronize all user and group objects with email address without any filters**.

5   Under **For Google Sync only**, select the **Google Sync task** check box.
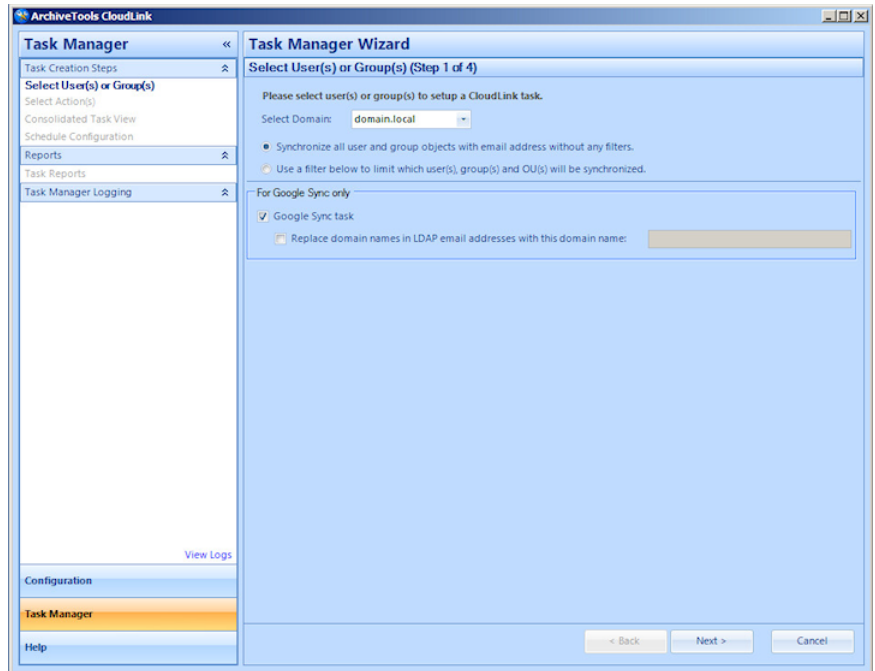
6   If required, select **Replace domain names in LDAP email addresses with this domain name**, and enter the replacement domain name. You must provide a fully qualified domain name.

If you select this option, the task changes the email addresses in Enterprise Vault.cloud to use the new domain name.

Note: This setting should match the equivalent setting in the Google Cloud Directory Sync tool (GCDS).

7   Click **Next** to save your choices and move to the **Select Action(s)** page.

See "Selecting the actions for a Google Sync task to perform" on page 45.

Note: If a dialog regarding the Allow Remote Account Management option appears, you must choose whether to enable remote account management before you continue.

See "About granting remote account management for CloudLink" on page 44.

Selecting entire OUs, or users and groups from within OUs

This procedure describes how to select entire OUs, or specific users and groups from an OU.

To select entire OUs, or users and groups from within OUs

1 At the bottom of CloudLink's left pane, click **Task Manager** to display the **Welcome to Task Manager Wizard** page.

2 Click **Start Task Manager Wizard**.

The wizard's **Select User(s) or Group(s)** step appears.

3 In the **Select Domain** drop-down list, select the required domain.

4 Select **Use a filter below to limit which user(s), group(s) and OU(s) will be synchronized**.

5 Under **For Google Sync only**, select the **Google Sync task** check box.

6 If required, select **Replace domain names in LDAP email addresses with this domain name**, and enter the replacement domain name. You must provide a fully qualified domain name.

If you select this option, the task changes the email addresses in Enterprise Vault.cloud to use the new domain name.

Note: This setting should match the equivalent setting in the Google Cloud Directory Sync tool (GCDS).

---

7 In the tree of Active Directory objects, click the name of an OU, so that the name becomes highlighted. The **User Search** pane displays the mail-enabled users and groups for the highlighted OU.
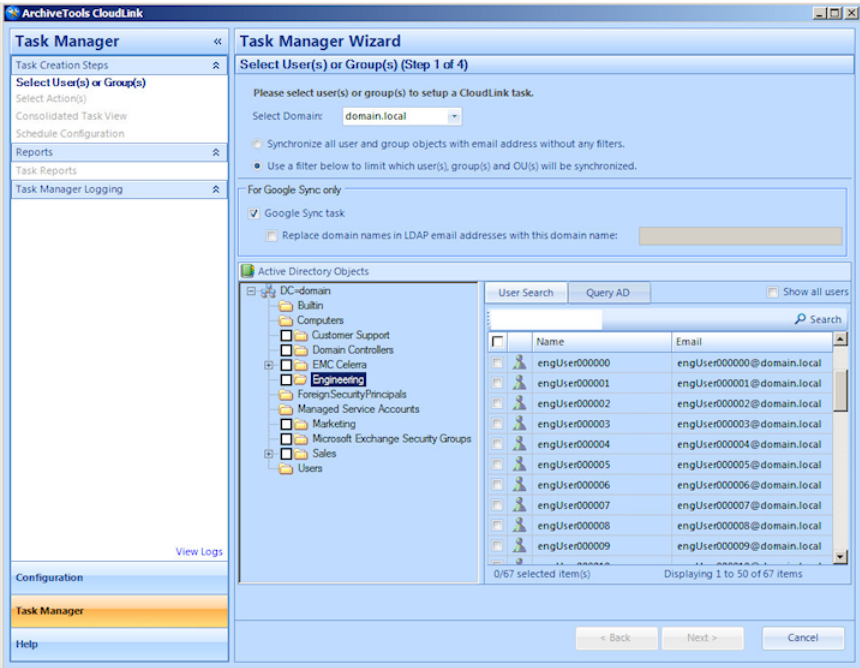
The information bar at the bottom of the **User Search** pane shows the following, for the currently highlighted OU:

■ How many items are currently selected out of the total.

■ How many items are currently displayed out of the total.
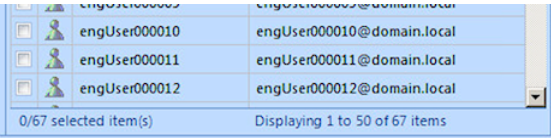
Note: By default the **User Search** pane displays only the first 50 items in the highlighted OU. To display all of the items, select the **Show all users** check box. Note however that the full list may take some time to appear if the OU has a large number of users and groups.

8 Select the required items as follows:

- To select the entire OU, select the check box for the OU in the tree of Active Directory objects.
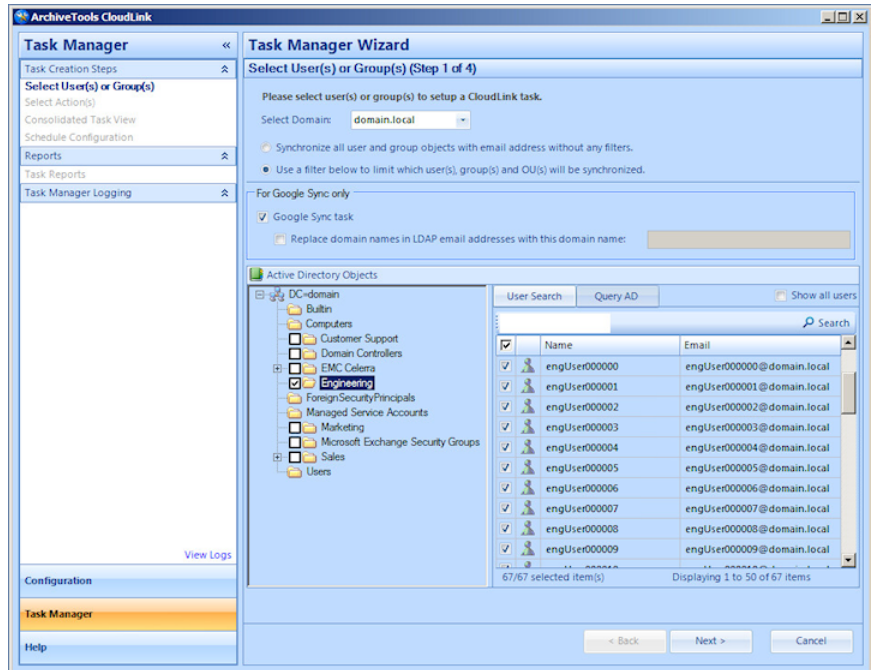
- To select mail-enabled users or groups individually from an OU, click the OUs name in the object tree to highlight the name, but do not select the OU's check box. Then in the **User Search** pane, select the check box for each user or group you want to include.

  To search for the name of a user or group in the highlighted OU, enter a search string in the **User Search** search box, and click **Search**.
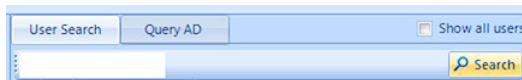
The **User Search** pane displays the results of the search, from which you can select any items as required.

Note: Searches are performed on the user name or group name only. The search string must match the user name or group name from the beginning. For example, a search for **Dav** matches **David Smith** and **Davinia Jones**, but not **John Davidson**. Wildcard search characters are not supported.

9 You can select multiple OUs or items from within multiple OUs. When you have made all your selections, click **Next** to save the selections and continue to the **Select Action(s)** wizard page.

See "Selecting the actions for a Google Sync task to perform" on page 45.

Note: If a dialog regarding the Allow Remote Account Management option appears, you must choose whether to enable remote account management before you continue.

See "About granting remote account management for CloudLink" on page 44.

Selecting users with an LDAP query

You can specify an LDAP query in Task Manager to select the users for a task. The LDAP query can include wildcard characters.

Note: Complex query strings may produce unexpected results. We recommend that you restrict LDAP queries to simple strings such as **name=chris***, other than for Group-based Sync.

Group-based Sync queries are described separately. See Selecting the members of a distribution group using Group-based Sync.

To select users with an LDAP query

1 On the **Welcome to Task Manager Wizard** page, click **Start Task Manager Wizard**.

The wizard's **Select User(s) or Group(s)** step appears.

2 In the **Select Domain** drop-down list, select the required domain.

3 Select **Use a filter below to limit which user(s), group(s) and OU(s) will be synchronized**.

4 Under **For Google Sync only**, select the **Google Sync task** check box.

5   If required, select **Replace domain names in LDAP email addresses with this domain name**, and enter the replacement domain name. You must provide a fully qualified domain name.

If you select this option, the task changes the email addresses in Enterprise Vault.cloud to use the new domain name.

Note: This setting should match the equivalent setting in the Google Cloud Directory Sync tool (GCDS).

---

6   In the **Active Directory Objects** area, select the **Query AD** tab.

7   In the tree of Active Directory objects, click a node in the tree to highlight the starting point for the LDAP query search. The **Root of Search** box shows the starting point that is selected.
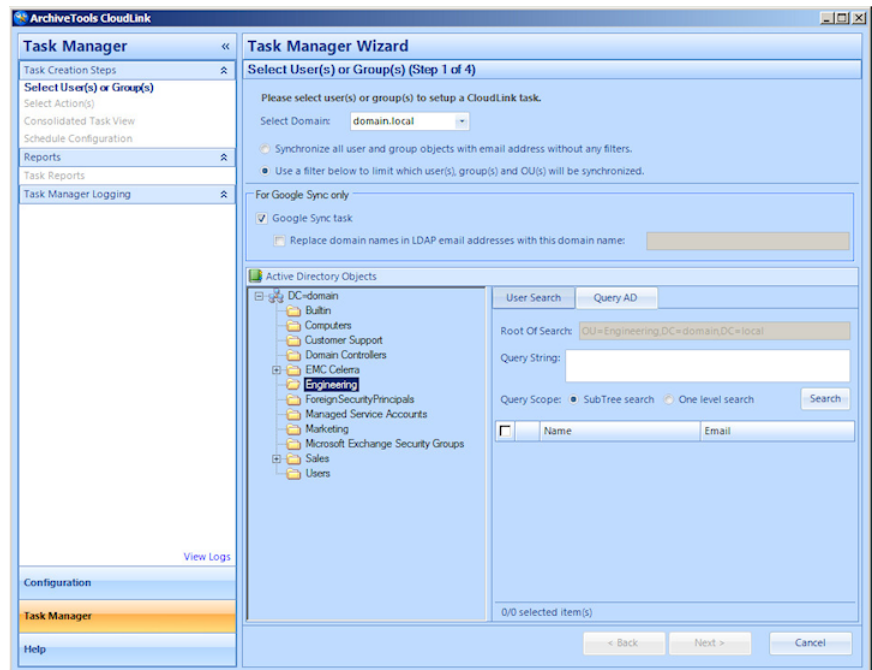
8   In the **Query String** box, enter an LDAP query string.

9   Choose a **Query Scope** option:

■   Select **SubTree search** to search within the selected OU and all of its child OUs.

- ■ Or select **One level search** to search within the selected level only. For example, if you chose an OU as the root of the search, CloudLink searches that OU only, and not any child OUs.

10 Click **Search**.

11 From the results that the search returns, select one or more of the users.

12 Click **Next** to save and continue to the **Select Action(s)** page.

See "Selecting the actions for a Google Sync task to perform" on page 45.

Note: If a dialog regarding the Allow Remote Account Management option appears, you must choose whether to enable remote account management before you continue.

See "About granting remote account management for CloudLink" on page 44.

Selecting the members of a distribution group using Group-based Sync

Group-based Sync selects the members of a distribution group on which to perform a task. Group-based Sync uses an LDAP custom query that includes the **memberOf** attribute to select the members of the distribution group. You can use a Group-based Sync to find all the members of the specified distribution group, including any membership that results from group nesting.

To select the members of a distribution group using Group-based Sync

1 On the **Welcome to Task Manager Wizard** page, click **Start Task Manager Wizard**.

The wizard's **Select User(s) or Group(s)** step appears.

2 In the **Select Domain** drop-down list, select the required domain.

3 Select **Use a filter below to limit which user(s), group(s) and OU(s) will be synchronized**.

4 Under **For Google Sync only**, select the **Google Sync task** check box.

5 If required, select **Replace domain names in LDAP email addresses with this domain name**, and enter the replacement domain name. You must provide a fully qualified domain name.

If you select this option, the task changes the email addresses in Enterprise Vault.cloud to use the new domain name.

Note: This setting should match the equivalent setting in the Google Cloud Directory Sync tool (GCDS).

6 In the **Active Directory Objects** area, select the **Query AD** tab.

7 In the tree of Active Directory objects, highlight the starting point for the LDAP query search. The **Root of Search** box shows the starting point that you selected.

8 In the **Query String** box, enter an LDAP query with the following format:

```
(&(memberOf:1.2.840.113556.1.4.1941:=group_DN))
```

where *group_DN* specifies the distinguished name of the distribution group. For example:

```
(&(memberOf:1.2.840.113556.1.4.1941:=CN=Users,OU=team,DC=domain,DC=local))
```

Note the following about the query syntax:

- A Group-based Sync query must include the **memberOf** attribute.

- The **1.2.840.113556.1.4.1941** matching rule OID causes the query to include the membership that results from group nesting.

9 Choose a **Query Scope** option:

- Select **SubTree search** to search within the selected OU and all of its child OUs.

- Or select **One level search** to search within the selected level only. For example, if you chose an OU as the root of the search, CloudLink searches that OU only, and not any child OUs.

10 Click **Search** to check that the search returns the results that you expect.

11 Click **Next** to save the query and continue to the **Select Action(s)** page.

See "Selecting the actions for a Google Sync task to perform" on page 45.

Note: If a dialog regarding the Allow Remote Account Management option appears, you must choose whether to enable remote account management before you continue.

See "About granting remote account management for CloudLink" on page 44.

About granting remote account management for CloudLink

The option **Manage account provisioning remotely** > **Using on-premise CloudLink tool** must be selected on the **User Management** page of the Enterprise Vault.cloud Administration Console, if CloudLink tasks are to perform the following actions:
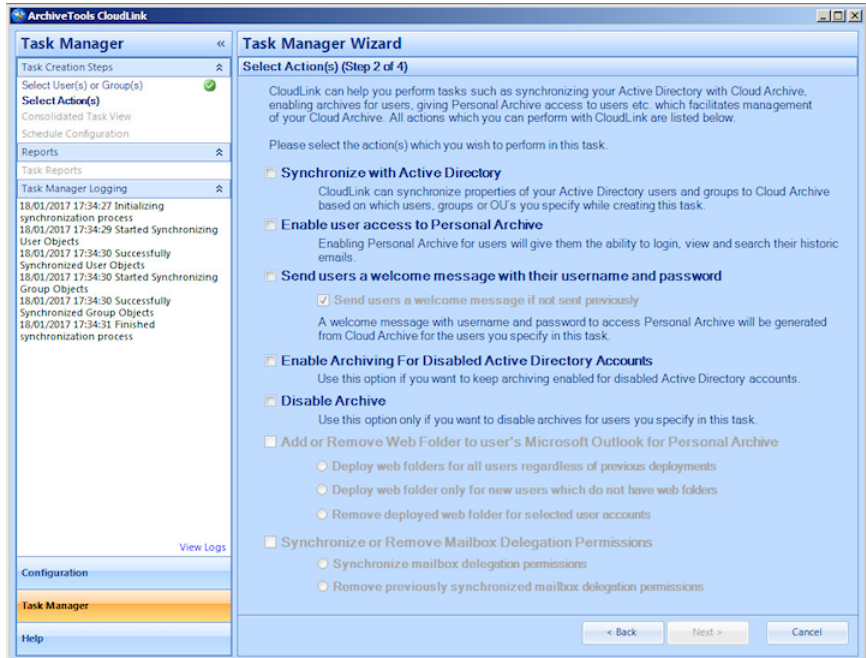
- Enable user access to Personal.cloud archives.

- Create welcome email messages for users with Personal.cloud archives.

Before the Task Manager Wizard displays the **Select Actions** step for the first time, CloudLink checks whether the CloudLink remote management option is selected in the Enterprise Vault.cloud Administration Console for the configured Archive Administration account. If the option is not selected, CloudLink displays a dialog box asking whether you want to enable the Allow Remote Account Management option.

- If you select **Yes**, CloudLink edits the **User Management** page for the configured account in the Enterprise Vault.cloud Administration Console to select the **Manage account provisioning remotely** > **Using on-premise CloudLink tool** option.

- If you select **No**, CloudLink makes no changes in the Enterprise Vault.cloud Administration Console. The actions to enable Personal.cloud archives and create welcome messages are not selectable in the Task Manager Wizard's **Select Action(s)** page.

Selecting the actions for a Google Sync task to perform

The **Select Action(s)** step of the CloudLink Task Manager Wizard lets you choose the actions that the task performs.

Note: The actions **Enable user access to Personal Archive** and **Send users a welcome message with their username and password** are not available for selection unless the option to manage account provisioning remotely using CloudLink is selected in the Enterprise Vault.cloud Administration Console.

See "About granting remote account management for CloudLink" on page 44.

Note: The actions **Add or Remove Web Folder to user's Microsoft Outlook for Personal Archive** and **Synchronize or Remove Mailbox Delegation Permissions** are always unavailable for selection with a Google Sync task, since they are not applicable for Google Sync.

To select the actions for a task to perform

1 On the **Select Action(s)** page, choose one or more actions for the task to perform, for the users you specified:

The following table describes all the actions you can select from.

|	
Synchronize with Active Directory	Synchronizes Active Directory properties with Enterprise Vault.cloud.
Enable user access to Personal Archive	Enables the user to access Enterprise Vault Personal.cloud.
Send users a welcome message with their username and password	Resets the password for the user's Personal.cloud account, and sends the new password to the user along with the user name, in a welcome message.
▪ **Send users a welcome message if not sent previously**	Sends the welcome message with the new password only if the task has not sent one before.
	Note: This option is selected by default, to avoid resetting passwords and sending welcome messages to users with existing passwords. If you deselect this option for a recurrent task, the task resets the account password and sends a welcome message every time it runs.
Enable Archiving for Disabled Active Directory Accounts	Enables archiving for disabled Active Directory accounts.
Disable Archive	Regardless of the Active Directory account status, treats the account as if it is disabled and performs the action that is selected under **For user accounts disabled in Active Directory** in the **Additional AD Sync Options** configuration step.
	See "Configuring the additional AD synchronization options" on page 23.
	For example, if the **For user accounts disabled in Active Directory** option is set to **Disable Enterprise Vault.cloud Archiving and Login**, then regardless of the Active Directory account status the task disables archiving and login to Personal.cloud.

2 Click **Next** to save the task selections and continue to the next wizard step.

Deselecting task actions for specific users or groups

The **Selected User(s) or Groups(s)** step of the CloudLink Task Manager Wizard provides a consolidated task view that summarizes the actions to be performed for each selected user or group. If you want, you can deselect specific actions for individual users or groups.

To deselect task actions for specific users or groups

1   On the **Selected User(s) or Group(s)** wizard page, deselect any chosen actions that are not required for a specific user or group.
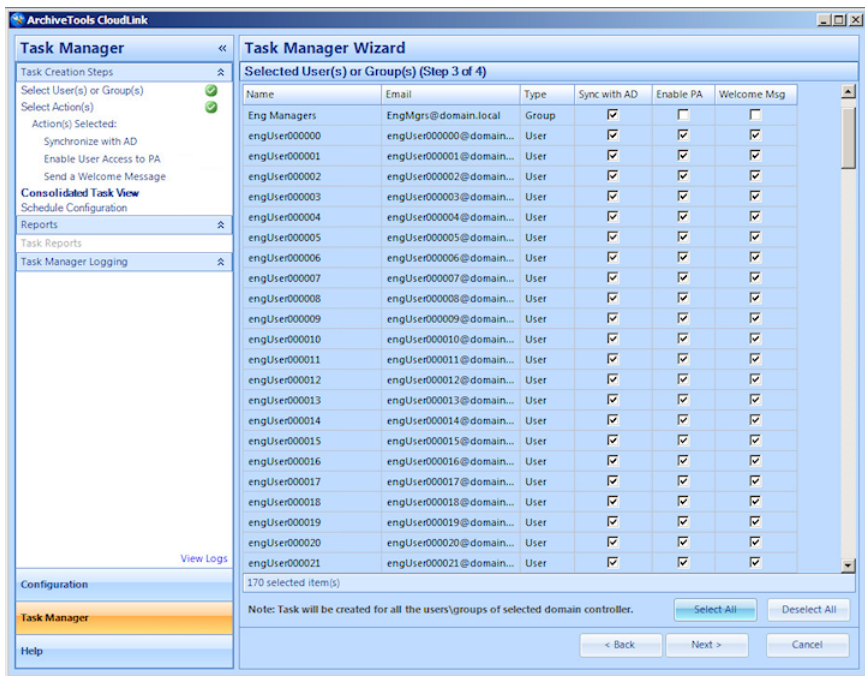
2   Click **Next** to save your selections and continue to the next wizard step.

Naming and launching the task

The **Schedule Configuration** step of the CloudLink Task Manager Wizard lets you name and launch the task.

Note: Google Sync tasks must be run immediately, and only once. You cannot schedule Google Sync tasks to run at a later time, or to recur.

To name and launch the task

1 On the **Schedule Configuration** wizard page, in the **Task Name** box, enter a name for the task.
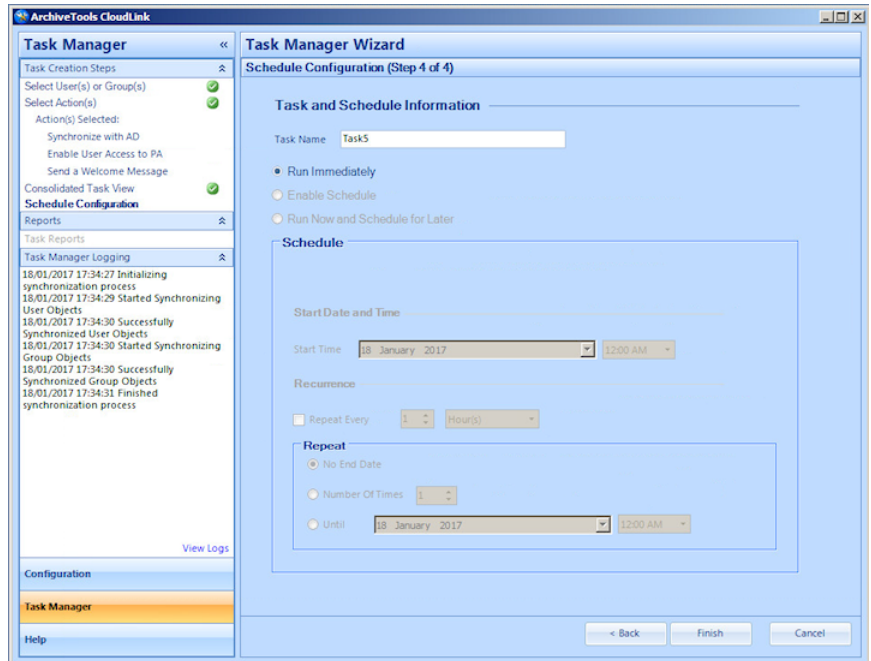
2 Note that the schedule information is not selectable for a Google Sync task.

When you are ready to run the task, click **Finish** to complete the CloudLink Task Manager wizard.

CloudLink returns to the **Welcome to Task Manager Wizard** page, and adds the task to the list of tasks in the **Created Task List**.

See "Viewing the Created Task List" on page 49.

Viewing the Created Task List

The **Created Task List** is displayed in the bottom pane of the **Welcome to Task Manager Wizard** page. The list shows all the existing tasks, including those tasks that have completed.

To view the Created Task List

◆ In CloudLink, select **Task Manager** near the bottom of the left pane.

On the **Welcome to Task Manager Wizard** page, the **Created Task List** pane lists all the existing tasks, including completed tasks that you have not deleted.

Note: For Google Sync tasks, the **Next Run** and **Frequency** columns always show **N/A**, since Google Sync tasks cannot be configured to recur.

If you want to run a task with the same or similar properties to a task you have run previously, you can copy or edit the existing task from the list.

See "Editing, copying, and deleting tasks from the Created Task List" on page 50.

Editing, copying, and deleting tasks from the Created Task List

You can do the following with the tasks that are listed in the Created Task List:

Table 5-3   Actions you can perform on tasks in the Created Task List

Action	Reference
Copy a task to create and run a new task that is identical except for its name.	See "To copy a task and run the new copy" on page 50.
Create a new task by using the values of an existing task as a starting point.	See "To create a new task by using the values of an existing task as a starting point" on page 50.
Delete a completed task from the task list.	See "To delete a completed task from the task list" on page 51.

To copy a task and run the new copy

1   Near the bottom of the left pane, click **Task Manager** near the bottom of the left pane, to view the **Welcome To Task Manager Wizard** page.

2   Under **Created Task List**, select the task that you want to copy, and then right-click.

3   Select **Copy Task** from the drop-down menu. The **Copy Task** dialog box appears.

4   In the **Task Name** box, enter a name for the new task.

Note: You cannot schedule Google Sync tasks. The task must be run immediately.

5   To create and run the new task, click **Copy**. Otherwise click **Cancel** to cancel the copy.

To create a new task by using the values of an existing task as a starting point

1   Near the bottom of the left pane, click **Task Manager** to view the **Welcome To Task Manager Wizard** page.

2   Under **Created Task List**, select the existing task and then right-click.

3   Select **Edit Task**.

4   The first page of the Task Manager Wizard appears. Work through the wizard
to edit the details for the new task and then run it.

See "Selecting users, groups, or OUs to synchronize" on page 34.

To delete a completed task from the task list

1   Click **Task Manager** near the bottom of the left pane, to view the **Welcome
To Task Manager Wizard** page.

2   Under **Created Task List**, select the task and then right-click.

3   Select **Delete Task**.

Note: You cannot delete a task if CloudLink is currently running it.

Monitoring tasks and managing archive accounts

This chapter includes the following topics:

- About the CloudLink task reports and log files

- Viewing the task reports

- About the CloudLink log files

- Exporting archive account information from the Archive User Browser

About the CloudLink task reports and log files

You can use CloudLink's task reports and daily logs to monitor the effects of your CloudLink tasks.

Table 6-1   Managing tasks and monitoring their results

Action	Reference
Monitor the progress and effects of tasks by viewing the task reports.	See "Viewing the task reports" on page 53.
Examine the CloudLink daily logs, to view the events and actions that resulted from that day's tasks.	See "About the CloudLink log files" on page 54.

Table 6-1	Managing tasks and monitoring their results *(continued)*

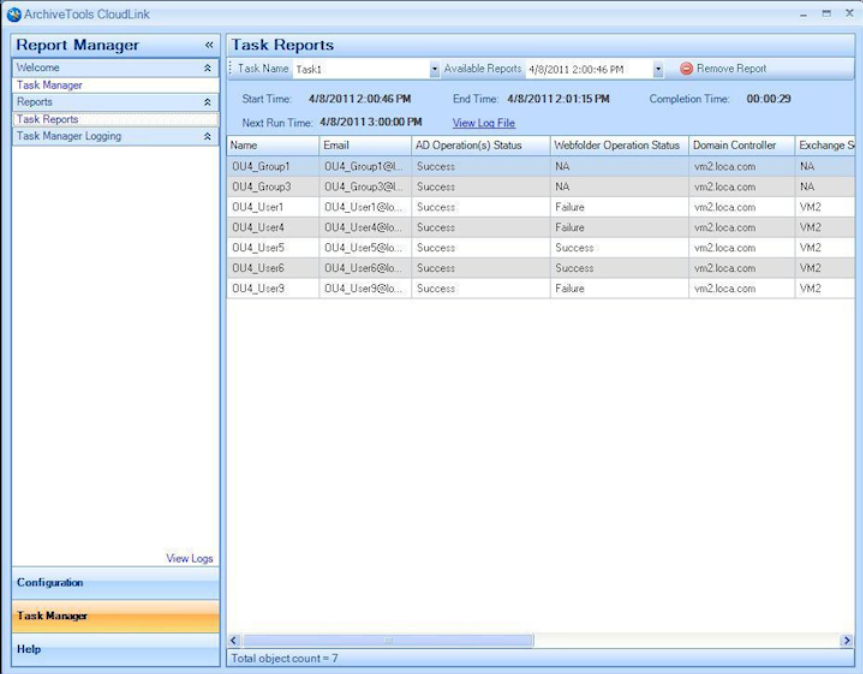| Action	Reference
Export the details of archive accounts from the Archive User Browser to a CSV (comma-separated values) file.	See "Exporting archive account information from the Archive User Browser" on page 56.

Viewing the task reports

CloudLink generates a report every time a task runs. You can view the task reports to monitor the progress of tasks, including whether each action completed successfully for each user that was a target for the task.

The task reports are accessed from the **Task Reports** page of Task Manager.

To view the task reports

1   Ensure that **Task Manager** is selected near the bottom of the left pane.

2   Select **Task Reports** from the left pane.

3   In the **Task Reports** window, in the **Task Name** box, select a task from the drop-down list.

4   If the task is recurrent, a report is available for each instance of the task. In the **Available Reports** box, select a report from the drop-down list.

   The Task Reports page then shows information for the selected task, or the selected instance of a recurring task. The table lists the results of each aspect of the task, for each user that was a target for the task.

Note: If a task fails to complete successfully, the Task Report states **Task Failed** below the **Completion Time**. For example, an Exchange task fails if the CloudLink service account does not have impersonation rights to each target Exchange mailbox.

From the **Task Reports** page, you can also perform some additional actions:

- To view the current ADSyncLog or DominoSyncLog log file, click the **View Log File** link.
  See "About the CloudLink log files" on page 54.

- To delete the selected report from CloudLink, click **Remove Report** in the **Task Reports** menu bar.

About the CloudLink log files

CloudLink generates a number of log files each day to log the events and actions that are associated with the tasks that run on that day.

CloudLink generates each day's log files in a date-stamped subfolder of the **Logs** folder. The path for the Logs folder is specified on the CloudLink Report Management configuration page. The default path is typically:

```
C:\Program Files\ArchiveTools\CloudLink\Logs\yyyymmdd
```

For example, for 18 February 2014:

```
C:\Program Files\ArchiveTools\CloudLink\Logs\20140218
```

Note: Only local administrators can access the Logs folder, assuming that the CloudLink service account is a member of the local Administrators group. Otherwise only local administrators and domain administrators can access the Logs folder.

Table 6-2 lists the details of the log files that CloudLink generates.

Table 6-2   CloudLink logs

Log file name	Description	Quick ways to access the log file
ADSyncLog.txt (Exchange) DominoSyncLog.txt (Domino)	Contains the synchronization details for all executed tasks.	Click **View Log File** on the **Task Reports** page. Or click the **View Logs** link at the bottom of the **Task Manager Logging** area, in the left pane of Task Manager.
Trace.Log	An event log that captures information about CloudLink operations, and task-specific details such as the creation of web folders.	Click **View Log File** on the **Task Reports** page. Or click the **View Logs** link at the bottom of the **Task Manager Logging** area, in the left pane of Task Manager.
SyncReport_nnnnnn.xml (where nnnnnn is a timestamp)	Includes various Active Directory or Domino Directory properties for each user, such as the user principal name.	Not applicable.

In addition to the log files, the **Task Manager Logging** area in the left pane of Task Manager provides a summary of synchronization events, which CloudLink updates dynamically.

Exporting archive account information from the Archive User Browser

The Archive User Browser displays information about the users that you have selected for CloudLink to synchronize. In Active Directory environments it can also provide information about all of the users in the Active Directory domains you registered with CloudLink.

You can export the details of users that are listed in the Archive User Browser to a CSV (comma-separated values) file. You can choose the account details to export, based on the account status.

To export the archive account information from the Archive User Browser to a CSV file

1   Select **Task Manager** near the bottom of the left pane.

2   On the **Welcome to Task Manager Wizard** page, in the **Archive User Browser** pane, click the **Export** drop-down.

3   From the **Export** drop-down menu, select the accounts whose details you want to include in the exported CSV file:

   ■   **Archive Active Accounts**: Include only the accounts for which archiving is set to enabled.

   ■   **Personal Archive accounts**: Include only the accounts for which access to Enterprise Vault Personal.cloud is set to enabled.

   ■   **Archive Disabled Accounts**: Include only the accounts for which archiving is set to disabled.

   ■   **Export All**: Include all of the accounts.

4   In the **Export** dialog, enter the destination file path for the CSV file and click **OK**.