Arctera™ Insight Archiving : Cloudlink Administration Guide

CloudLink 4.0.x to 4.1.x

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Arctera Insight Archiving: CloudLink Administration Guide

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Contents

Chapter 1

About this guide

This chapter includes the following topics:

About this guide

This guide provides instructions for installing, configuring, and using the CloudLink on-premises application. This guide focuses on:

- Installing, upgrading, and uninstalling the CloudLink application.
- Provisioning archive accounts in Arctera Insight Archiving applications by using directory data from Microsoft Active Directory or IBM Domino Directory.
- Synchronize user and group updates from Microsoft Active Directory or IBM Domino Directory to corresponding archive accounts.
- Enabling and disabling users' access to their archives.
- Configuring and managing Insight Personal Archive web folders in Microsoft Exchange environments
- Sending welcome messages to Insight Personal Archive users containing login credentials and access information.

Note: CloudLink can also 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. For more information, see the CloudLink Google Account Synchronization Guide.

Prerequisite knowledge

In Microsoft Exchange environments, CloudLink should be set up and maintained by a qualified Exchange administrator. This person must be proficient in managing and maintaining the Exchange environment to ensure that the Exchange servers and CloudLink are functioning properly at all times.

In IBM Domino environments, CloudLink should be set up and maintained by a qualified Domino administrator. This person must be proficient in managing and maintaining the Domino environment to ensure that the Domino servers and CloudLink are functioning properly at all times.

Chapter 2

About CloudLink

This chapter includes the following topics:

About CloudLink

CloudLink is a downloadable application that you install locally to aid the deployment and management of Arctera Insight Archiving:

- CloudLink simplifies Arctera Insight Archiving archive provisioning by synchronizing Microsoft Active Directory or IBM Lotus Domino Directory accounts with Arctera Insight Archiving. You can use CloudLink to maintain the synchronization between your organization and Arctera Insight Archiving, and to enable or disable Arctera Insight Personal Archive access for individual users.
- For Microsoft Exchange mailboxes you can use CloudLink to deploy and manage Insight Personal Archive web folders. The Insight Personal Archive web folders enable users to access their Insight Personal Archive archive directly from within Outlook and supported versions of the Outlook Web App (OWA).

CloudLink can also synchronize Exchange mailbox delegation permissions. See "Introduction to Exchange mailbox delegation synchronization" on page 17.

- You can use CloudLink to send welcome email messages to users, informing them about their Insight Personal Archive archive and how to access it.

Note: You can also use CloudLink to 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. For more information, see the CloudLink Google Account Synchronization Guide.

Synchronizing user accounts from Microsoft Active Directory

CloudLink synchronizes user and group information from Microsoft Active Directory in Exchange on-premises environments to Veritas Alta Archiving.

CloudLink facilitates you to:

- Browse the Organizational Unit (OU) structure to select mailbox-enabled users and mail-enabled group objects for synchronization.
- Synchronize individual user accounts, including those within security groups and nested dynamic groups.

  Note: CloudLink synchronizes email aliases only for individual accounts. Aliases within security groups or dynamic groups are not synchronized.

- Detect changes in Active Directory such as user or group creation, deletion, disablement, and modification, and propagate those changes to Veritas Alta Archiving as configured.
- Define synchronization actions for specific account changes occurring in Active Directory.

Synchronizing user accounts from IBM Domino Directory

CloudLink synchronizes Notes mail users from the Domino Directory to Veritas Alta Archiving. All Notes mail users within the directory are available for synchronization.

CloudLink facilitates you to:

- Use Domino views to specify the users to be synchronized.
- Detect changes such as user creation, deletion, denied access, and modification in Domino views.
- Allow CloudLink to propagate those changes to Veritas Alta Archiving, if required.
- Configure CloudLink to define specific actions in Veritas Alta Archiving when account changes occur in the Domino Directory.

Synchronizing user accounts from Google G Suite

CloudLink can synchronize accounts from Google G Suite Enterprise Gmail to Veritas Alta Archiving in environments where Microsoft Active Directory manages user identities.

CloudLink facilitates you to:

- Provision archive accounts for G Suite users and groups based on AD management.
- Extend existing identity synchronization logic across hybrid directory environments.

For configuration details, refer to the CloudLink Google Account Synchronization Guide.

Configuring Insight Personal Archive web folders for Microsoft Exchange mailboxes

CloudLink facilitates you to configure Personal Archive web folders for Microsoft Outlook and Outlook Web App (OWA) in supported Microsoft Exchange Server environments. These web folders use Outlook's Home Page feature to display a web page directly within a folder pane, enabling seamless access to a user's Insight Personal Archive. Arctera Insight Archiving provides the archive access web page.

CloudLink enables administrators to specify configuration settings—such as the region-specific archive URL, folder name, and folder location—during task creation. Once deployed, users can access their archive through:

Microsoft Outlook, if the *Home Page* feature is enabled

Outlook Web App (OWA) in Exchange Server 2007 and 2010 only.

Should I upgrade to CloudLink 4.1.x?

If you use CloudLink 4.0.x or an earlier version, check for the latest release and upgrade to apply all recent updates.

CloudLink revision history

Table 2-1 provides a version-wise summary of recent application changes.

Table 2-1 CloudLink recent revision history

CloudLink version	Release Date	Changes
CloudLink 4.1.7	May 2025	Before version 4.1.7, CloudLink was supporting synchronization of delegate permissions only within the same platform—either on-premises to on-premises platforms or cloud to cloud platforms. Cross-platform synchronization of delegate permissions between on-premises Exchange and Exchange Online/M365 was not supported. CloudLink 4.1.7 supports Cross-platform synchronization of delegate permissions between on-premises Exchange and Exchange Online/M365 within the Arctera Insight setup. For example: ■ **CloudLink** synchronizes mailboxes and the delegate permissions from on-premises Exchange to Arctera Insight platforms. ■ **Exchange Online** synchronizes mailboxes and the delegate permissions from Exchange Online/M365 to Arctera Insight platforms. This setting is disabled by default. To enable or disable it, contact your system administrator, who can request the change through Arctera Support.
CloudLink 4.1.5		CloudLink version 4.1.5 has the following change: ■ Microsoft .NET Framework is changed from 4.0 to 4.8

Table 2-1 CloudLink recent revision history *(continued)*

CloudLink version	Release Date	Changes
CloudLink 4.1.4	Dec 2023	CloudLink version 4.1.4 supports the activation of the secondary domain controller in case the Primary domain controller fails, for reasons such as a network outage. ■ Synchronizing the delegation permissions for a user or a shared mailbox with the delegates from different active directory domains. ■ Synchronizing additional SMTP aliases using the active directory extension attribute. ■ Getting only the modified account details from the last synchronization time to optimize the cloud archive status synchronization. Note: The time required to upgrade from the previous CloudLink installation depends upon the size of the customer database.
CloudLink 4.1.2	Dec 2020	This version provides support for the following updates: ■ Synchronizing the delegation permissions for a user or a shared mailbox with delegates from different active directory domains. ■ Support secondary domain controller if Primary domain controller goes down. ■ Synchronizing additional SMTP aliases using the active directory extension attribute. ■ Getting only the modified account details from the last synchronization time to optimize the cloud archive status synchronization. Note: The time required to upgrade from the previous CloudLink installation depends upon the size of the customer database.
CloudLink 4.1.1	June 2020	Introduced support for the following: ■ Installation of the CloudLink application on Microsoft Windows Server 2016 and Microsoft Windows Server 2019. ■ Provisioning of accounts from Microsoft Windows Server 2016 Active Directory.
CloudLink 4.1.0	March 2020	Upgrade of SQL Compact Edition from Version 3.5 to 4.0
CloudLink 4.0.3	April 2018	The region names have changed in the configuration options for selecting the Arctera Insight Archiving region.
CloudLink 4.0.2	January 2018	This version adds support for the Arctera Insight Archiving US-US3 region data center.

Table 2-1 CloudLink recent revision history *(continued)*

CloudLink version	Release Date	Changes
CloudLink 4.0.1	January 2017	This version includes 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. For more information, see the CloudLink Google Account Synchronization Guide. This version of CloudLink also contains a number of bug fixes, including fixes for the following issues: ■ If you used the Archive User Browser to select the users for a task, the task ran for the selected users, but in the **Created Task List** the **Target** was recorded as **All**. This has been fixed. ■ In the welcome message template, CloudLink failed to save a change to the **From** field unless you also changed the content of the **Body** field. This has been fixed. ■ In the Task Manager wizard, a problem occurred if you attempted to configure a task to repeat a set number of times. When you selected **Number Of Times**, CloudLink displayed the error message `String was not recognized as a valid DateTime`, and you could not save the task. This has been fixed. ■ A problem occurred if you attempted to copy a task that had already run. CloudLink displayed the error message `String was not recognized as a valid DateTime`. This has been fixed. ■ When CloudLink performed the bulk removal of web folders, it could fail to remove a web folder if the folder's name or URL had changed. Now CloudLink uses a more effective method to identify the web folders for removal. ■ On the Task Manager wizard's page for Exchange user, group, or OU selection, the explanatory text was not clear. The text has now been improved.

Table 2-1 CloudLink recent revision history *(continued)*

CloudLink version	Release Date	Changes
CloudLink 4.0	January 2016	This version of CloudLink introduced the following: ■ Synchronization of on-premises Exchange mailbox delegation permissions. A new action for Exchange tasks lets you synchronize the delegation permissions that are applied to user mailboxes and shared mailboxes. See "Introduction to Exchange mailbox delegation synchronization" on page 17. ■ Group-based Sync, which supports a specific LDAP custom query format to target Exchange distribution groups. Group-based Sync can accommodate changes in group membership when it is used in recurrent tasks. A new configuration file option lets you control what happens to the accounts of users who leave a distribution group that is targeted with a Group-based Sync. See "Selecting users, groups, or OUs from the Task Manager Wizard" on page 69.
CloudLink 3.4.1	September 2014	This version of CloudLink introduced the following: ■ Support for synchronizing linked mailboxes in an Exchange resource forest. Note: The option **For user accounts disabled in Active Directory** does not apply to synchronized accounts with linked mailboxes. See "Configuring the additional Active Directory synchronization options" on page 50. ■ A new option to disable archiving for synchronized accounts if the Exchange mailbox becomes disabled. Note: Accounts whose Exchange mailboxes become disabled continue to be archived unless you configure this option. See "Disabling Insight Personal Archive login and archiving for accounts with disabled mailboxes" on page 57.
CloudLink 3.4.0	March 2014	Introduced support for the following: ■ Provisioning of accounts from IBM Domino 9. ■ Provisioning of accounts from Windows Server 2012 R2 Active Directory. ■ Insight Personal Archive web folders with Microsoft Exchange 2013. ■ Archiving from Microsoft Exchange Server database availability groups (DAG). ■ Installation of the CloudLink application on Windows Server 2012 R2.

Table 2-1 CloudLink recent revision history *(continued)*

CloudLink version	Release Date	Changes
CloudLink 3.3.1	June 2013	Provided support for synchronization of dynamic distribution groups from Microsoft Exchange.

Chapter 3

About Exchange mailbox delegation synchronization

This chapter includes the following topics:

Introduction to Exchange mailbox delegation synchronization

CloudLink tasks for Exchange include an optional action to synchronize mailbox delegation permissions (to be selected with the ***Synchronize with Active Directory*** action). This option enables users to read in Personal.cloud the archived messages of Exchange mailboxes for which they have Full Access delegation permission.

Note the following regarding mailbox delegation synchronization at this release:

- CloudLink synchronizes the delegation permissions that have been applied to on-premises Exchange user mailboxes and shared mailboxes. The Exchange administrator typically applies these mailbox delegation permissions through the Exchange Admin Center or the Exchange Management Console, or with PowerShell.
- Previously, the delegate permissions were only synced for accounts in the same AD domain. Shared mailbox permissions were not propagating across

to EV.Cloud. Users from another domain were unable to replicate. However, this cross-domain delegation permission problem is resolved. You can use the **ResolveCrossDomainDelegates** key to configure cross domain delegation permissions for the users from different domain.

If there is any problem for resolving delegates, especially across cross domains, switch off that functionality using this **ResolveCrossDomainDelegates** key with value "0". This ignores the delegate in cross domain and works as it was working in earlier version.

- CloudLink does not synchronize delegate access to mailbox folders that users can set from Outlook.
- CloudLink synchronizes delegation permissions that have been granted to users and mail-enabled security groups.

For information on the versions of Exchange that CloudLink supports for delegate permission synchronization, see the Arctera Insight Archiving Compatibility List.

CloudLink also provides a task action to remove any previously synchronized Exchange mailbox delegation permissions from Arctera Insight Archiving.

About the effects of synchronized delegation permissions

The effects of synchronized delegation permissions depend on whether the delegation permissions are granted to a user or to a mail-enabled security group.

Table 3-1 describes the effects of synchronization of delegation permissions that are granted to a user.

Table 3-1 Effects of synchronization of delegation permissions granted to a user

Mailbox delegation permission	Effect of the synchronized permission in Insight Personal Archive
Full Access	The user can read the account's archived items in Insight Personal Archive. Note: This access is not granted if the user belongs to a mail-enabled security group that has a synchronized Deny Full Access permission.
Deny Full Access *	The user cannot read the account's archived items.
Send As	No effect at this release.

Table 3-1 Effects of synchronization of delegation permissions granted to a user *(continued)*

Mailbox delegation permission	Effect of the synchronized permission in Insight Personal Archive
Send on Behalf	No effect at this release.

* Deny Full Access permission can only be set from PowerShell.

Table 3-2 describes the effects of synchronization of delegation permissions that are granted to a mail-enabled security group.

Table 3-2 Effects of synchronization of delegation permissions granted to a mail-enabled security group

Mailbox delegation permission	Effect of the synchronized permission in Insight Personal Archive
Full Access	Users who are members of the group can read the account's archived items in Insight Personal Archive. **Note**: This access is not granted if the user has a synchronized Deny Full Access permission.
Deny Full Access *	Users who are members of the group cannot read the account's archived items.
Send As	No effect at this release.
Send on Behalf	No effect at this release.

* Deny Full Access permission can only be set from PowerShell.

Note that If conflicting access permissions are synchronized, Arctera Insight Archiving always gives precedence to the deny access permission. This behavior matches Microsoft's handling of conflicting delegation permissions with regard to mailbox access.

When you view the details of an archive account under Account Management in the Management Console, the **Delegate Access** pane lists any users or groups that have delegate access. For more details, see the Arctera Insight Archiving Archive Administration help.

About the synchronization of delegation permissions with recurring tasks

After the first run of a recurring synchronization task, the task normally considers for synchronization only those targeted users whose Active Directory properties have changed. However, if you selected delegate permissions synchronization for a recurring task, CloudLink considers for synchronization on each run every targeted user with mailbox delegation, regardless of whether the user's Active Directory properties have changed. This behavior ensures that mailbox delegation permissions are kept up to date.

Requirements for delegation permissions synchronization

Table 3-3 lists the conditions under which a CloudLink task considers a delegate for delegate permissions synchronization.

Table 3-3 Requirements for delegate permissions synchronization

Delegate type	Requirement for delegate permissions synchronization
User	The user must have a pre-existing archive account.
Mail-enabled security group	The synchronization task must target the group.

Note that if the delegate type is a user, there is no requirement for the task to target the user, provided the user already has an archive account. Conversely, if the delegate type is a group, the task must target the group for the delegation permissions to be synchronized.

Access restrictions when the requirements are not met for a delegate with deny permission

Table 3-4 lists the restrictions on delegate access if the synchronization requirement is not met for a delegate with a Deny delegation permission.

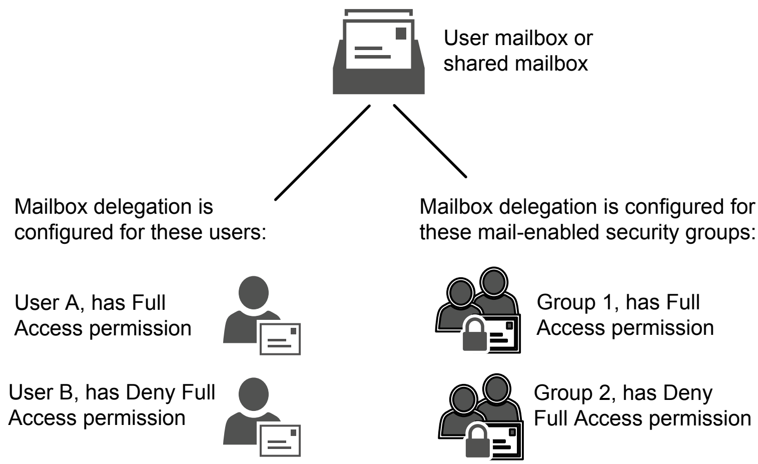
Table 3-4 Delegate access restrictions if a delegate has a deny permission and synchronization requirements are not met

Delegate type with Deny permission	If this situation applies	Synchronization task takes this action	Result
User	The user does not have a pre-existing archive account.	The task removes any existing synchronized delegate permissions for the delegated mailbox.	No-one has delegate access to the mailbox archive.
Mail-enabled security group	The synchronization task does not target the group.	The task removes any existing synchronized delegate permissions for the delegated mailbox.	No-one has delegate access to the mailbox archive.

Arctera Insight Archiving imposes these delegate access restrictions to ensure that users do not gain delegate access to archive accounts when a Deny delegation permission may have been set to prevent it.

Figure 3-1 shows a user mailbox or shared mailbox to which the Exchange administrator has assigned a number of mailbox delegation permissions.

Figure 3-1 Example: Mailbox with delegation permissions set for users and mail-enabled security groups



In this example, the Exchange administrator has granted **User A** and members of **Group 1** Full Access permission to the mailbox. In contrast, **User B** and members of **Group 2** have been given Deny Full Access permission. Assuming that

CloudLink has synchronized all of these delegation permissions, then User A and members of Group 1 have access to the delegated mailbox archive, subject to the precedence of any deny delegation permissions.

- But suppose that User B does not have an archive account. Since User B has a deny delegation permission, the task removes any synchronized delegation permissions for the mailbox. No-one has delegate access to the mailbox archive.
- Or suppose that Group 2 is not targeted by the synchronization task, or that it becomes no longer targeted by a recurring synchronization task. For example, the group could be moved to an organizational unit that is not within the scope of the task. The task removes any synchronized delegation permissions for the mailbox, so that no-one has delegate access to the mailbox archive.

Synchronizing the delegation permission for a user or a shared mailbox with delegates from different active directory domains

You can configure the **ResolveCrossDomainDelegates** setting in the **ArchiveTools.CloudLink.Server.exe.config** file to synchronize the delegation permissions for a user with delegates from different active directory domains.

To synchronize the delegation permission for a user or a shared mailbox with delegates from different active directory domains

1. Go to the folder in which CloudLink is installed, typically **C:\Program Files\ArchiveTools\CloudLink**.
2. 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.
3. Use a text editor such as Notepad to open **ArchiveTools.CloudLink.Server.exe.config**.
4. To enable this functionality, specify the **ResolveCrossDomainDelegates** setting value as **1**.

   Note: By default, this value is set to **1**.

   ---
5. To disable this functionality, specify the **ResolveCrossDomainDelegates** setting value as **0**.
6. Restart the **ArchiveTools CloudLink Server** service for the change to take effect.

Chapter 4

System requirements for CloudLink

This chapter includes the following topics:

About the requirements for CloudLink

Read about the requirements for CloudLink before you proceed with the installation.

- See "About the Microsoft Exchange and IBM Domino configurations that are compatible with CloudLink" on page 23.
- See "CloudLink server requirements" on page 24.
- See "About the account credentials that CloudLink requires" on page 25.

About the Microsoft Exchange and IBM Domino configurations that are compatible with CloudLink

CloudLink is compatible with specific versions of the following products:

- Microsoft Active Directory

- Microsoft Exchange
- Microsoft Outlook Web Access/Outlook Web App (OWA)
- IBM/Lotus Domino and Notes

For information about the versions of these products that work with CloudLink, see the Arctera Insight Archiving Compatibility List.

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 Exchange server, Domino server, or Active Directory domain controller, due to the potential performance effect.

Table 4-1 specifies the requirements for the server on which you run CloudLink.

Table 4-1 CloudLink server requirements

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 ■ Microsoft Windows Server 2016 ■ Microsoft Windows Server 2019 **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 4.8

Table 4-1 CloudLink server requirements *(continued)*

Item	Requirement
Notes client requirement for Domino Directory synchronization.	Lotus Notes client 8.5.3 or IBM Notes client 9.0 must be installed on the CloudLink server. You can use either of these Notes clients with any Domino server version that CloudLink supports. The Notes client must be configured in single-user mode, using default directories. The Notes client must be configured using the ID file of a user that has at least Reader access to the Domino Directory. The ID file must be stored in the default data directory. See "Creating a Notes account for CloudLink and setting up Notes on the CloudLink server" on page 88.
Server/network account permissions	To install the CloudLink application you require Local System Administrator permissions.
Server location	If you deploy CloudLink in an Exchange resource forest environment, the CloudLink server must be located in the forest where the Exchange servers reside.
Internet connectivity	When in use, CloudLink requires Internet connectivity to perform synchronizations to Arctera Insight Archiving. 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 Arctera Insight Archiving geographical region. All traffic is on port 443. You can obtain the data center URL for your Arctera Insight Archiving geographical region from Arctera Services & Support.
Network access	When in use, CloudLink requires network access to your Active Directory or Domino Directory. If you configure Insight Personal Archive web folder deployment, CloudLink also requires network access to your Exchange Server domains.

About the account credentials that CloudLink requires

During the configuration of CloudLink you must provide the credentials for a number of accounts:

- The CloudLink service account. This is a Windows service account with the required permissions. The ArchiveTools CloudLink Server service runs under this account to access Active Directory, Exchange servers and Domino servers, and to deploy Insight Personal Archive web folders.
  See "Creating a CloudLink service account for an Exchange environment" on page 33.
  See "Creating a CloudLink service account for a Domino environment" on page 88.
- If you configure Active Directory synchronization or Domino Directory synchronization, CloudLink requires the credentials of the Management Console account. This account must have the System Administrator administration role in the Management Console.
- For Domino Directory synchronization, you must specify the password for the Notes ID file that was used to configure the Lotus Notes client on the CloudLink server.
  See "CloudLink server requirements" on page 24.

Chapter 5

Steps to set up CloudLink

This chapter includes the following topics:

Steps to set up CloudLink

Table 5-1 lists the major steps that are required to set up CloudLink.

Table 5-1 Principal steps to set up CloudLink

Step	Action	Reference
Step 1	Check the requirements for CloudLink.	See "About the requirements for CloudLink" on page 23.
Step 2	Install or upgrade the CloudLink application.	See "About installing and upgrading CloudLink" on page 28.
Step 3	Perform the required configuration steps to set up CloudLink in a Microsoft Exchange or IBM Domino environment.	See "About setting up CloudLink with Microsoft Exchange" on page 32. See "About setting up CloudLink with Domino" on page 87.
Step 4	Create the CloudLink tasks to perform the actions you require.	See "About creating CloudLink tasks for Exchange" on page 62. See "About creating CloudLink tasks for Domino" on page 101.
Step 5	Monitor and manage your CloudLink tasks.	See "About managing tasks and monitoring their results" on page 113.

Chapter 6

Installing or upgrading the CloudLink application

This chapter includes the following topics:

About installing and upgrading CloudLink

You can download the latest version of CloudLink and perform a new installation or upgrade an existing installation.

- See "Performing a new installation of CloudLink" on page 28.
- See "Upgrading CloudLink" on page 29.

You can remove the CloudLink application if you no longer require it.

- See "Uninstalling CloudLink" on page 31.

Performing a new installation of CloudLink

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

To perform a new installation of CloudLink

1. Download the appropriate version of the compressed CloudLink installation file from the following location on the Arctera Support website:

   https://www.veritas.com/content/support/en_US/downloads/detail.REL987212#item2

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 `setup.exe`, and then select **Run as administrator** from the shortcut menu.
   - Otherwise, double-click the file `setup.exe`.
4. Follow the CloudLink setup wizard.

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

Upgrading CloudLink

Overview

Upgrading to CloudLink version 4.1.7 provides enhancements such as cross-platform delegate permission synchronization and removal of legacy dependencies.

Note: For details on version-specific enhancements introduced in earlier versions, see the **About CloudLink** chapter in this guide.

Before you begin

Read the following points carefully before starting the CloudLink upgrade process. These considerations help ensure a smooth transition and prevent configuration or compatibility issues during the upgrade.

- Do not upgrade directly to version 4.1.7 from versions earlier than 4.1.2. Upgrade to version 4.1.2 first, then proceed to 4.1.7 to avoid configuration issues.
- Access the configuration file from the path mentioned below and create a backup before proceeding. The file location depends on your system architecture (32-bit or 64-bit):

- **For 32-bit systems**: `C:\Program Files (x86)\ArchiveTools\CloudLink\ArchiveTools.CloudLink.Server.exe.config`
- **For 64-bit systems**:`C:\Program Files\ArchiveTools\CloudLink\ArchiveTools.CloudLink.Server.exe.config`

  After the upgrade, refer to the backup to verify and restore any custom configuration settings, if required. After upgrading to the latest CloudLink version as per the provided instructions, compare the new configuration file with your backup. Reapply any custom settings from the backup to the new configuration file to maintain your previous configurations.

- Do not interrupt or cancel the upgrade process. Doing so may leave the CloudLink database in an inconsistent or unusable state.

Standard upgrade (32-bit to 32-bit or 64-bit to 64-bit)

Follow the steps below to ensure a smooth upgrade process.

To perform a standard upgrade

1. Ensure your system meets all prerequisites.

   See "CloudLink server requirements" on page 24.

2. Open the **Windows Services MMC** snap-in, and stop the **ArchiveTools CloudLink Server** service.

3. Uninstall the current CloudLink version from **Control Panel** > **Add/Remove Programs**.

4. Download the appropriate CloudLink installation package from the Arctera Support website.

5. Extract the downloaded ZIP file and run the `setup.exe` from the required folder (based on your system environment).

   - For a 32-bit installation: `CloudLink 4.1.7 32-bit`
   - For a 64-bit installation: `CloudLink 4.1.7 64-bit`

6. Follow the CloudLink setup wizard. When prompted for the installation folder, specify the path where the previous version of CloudLink was installed.

   After the installation completes, the **ArchiveTools CloudLink** icon appears on the Windows desktop.

7. Open the **Windows Services MMC** snap-in, and start the **ArchiveTools CloudLink Server** service.

Additional step (for Domino environment):

If you use CloudLink to manage a Domino environment, you must re-enter the*Notes ID password* in the CloudLink configuration settings.

To re-enter the Notes ID password after the upgrade

1. Launch CloudLink and select the **Configuration** tab.
2. In the **Configuration TaskList** pane, click **Start Configuration TaskList**
3. On the **Select Configuration Task(s)** page, re-select the required Domino configuration tasks, and then click **Next**.
4. On the **Specify CloudLink Service Account** page, click **Next** to display the **Specify Notes ID** configuration step.
5. In the **Notes ID Password** box, enter the password of the Notes ID file that CloudLink uses to access the Domino Directory and the views.
6. Click **Login**.
7. If the login is successful, a dialog box indicates that the Notes ID file was successfully accessed. Click **OK** on the dialog.
8. Click **Next** to save the Notes ID password.
9. Click **Next** to browse though the remaining configuration steps.
10. On the **Report Management** step, click **Finish** to save the updated configuration.

Uninstalling CloudLink

You can uninstall the CloudLink application if you no longer require it.

Note: After an uninstallation the CloudLink configuration files and task files remain on your computer in the CloudLink installation folder.

The CloudLink uninstaller will not uninstall the SQL Compact Edition version 3.5 that is installed by older versions of CloudLink. However, it can be uninstalled as long as no other program (a Veritas or an approved third-party product) depends on it.

To uninstall CloudLink

1. Open the Windows **Services** MMC snap-in, and stop the **ArchiveTools CloudLink Server** service.
2. Uninstall CloudLink through the Windows Control Panel's Add/Remove programs option.

Chapter 7

Setting up CloudLink with Microsoft Exchange

This chapter includes the following topics:

About setting up CloudLink with Microsoft Exchange

Table 7-1 lists the steps that are required to set up CloudLink for use in a Microsoft Exchange environment.

Table 7-1 Steps to set up CloudLink with Microsoft Exchange

Action	Reference
Create a service account for CloudLink.	See "Creating a CloudLink service account for an Exchange environment" on page 33.

Table 7-1 Steps to set up CloudLink with Microsoft Exchange *(continued)*

Action	Reference
Configure the Exchange servers for CloudLink.	Perform the steps for your version of Exchange: ■ See "Configuring Exchange 2003 servers for CloudLink" on page 33. ■ See "Configuring Exchange Server 2007, 2010, 2013, and 2016 servers for CloudLink" on page 37.
Run the CloudLink configuration wizard.	See "Configuring CloudLink for Microsoft Exchange" on page 40.

Creating a CloudLink service account for an Exchange environment

CloudLink requires a Windows service account for the ArchiveTools CloudLink Server service to run under. CloudLink uses this account to access Active Directory and Microsoft Exchange.

To create a CloudLink service account for an Exchange environment

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 installed.
3. Add the account to the Domain Admins group.
4. As part of configuring your Exchange servers for CloudLink you must assign the required permissions for the CloudLink service account.

   See "Configuring Exchange 2003 servers for CloudLink" on page 33.

   See "Configuring Exchange Server 2007, 2010, 2013, and 2016 servers for CloudLink" on page 37.

Configuring Exchange 2003 servers for CloudLink

You must perform some configuration steps on your Exchange Server 2003 servers to prepare for the configuration of CloudLink.

Note: Perform the appropriate steps on each Exchange Server 2003 server with which you want to use CloudLink.

Table 7-2 lists the configuration steps.

Table 7-2 Exchange 2003 server configuration steps

Step number	Exchange server configuration step	Reference
Step 1	Ensure that the Web Server Extensions WebDAV protocol is enabled.	See "Ensuring that the WebDAV protocol is enabled" on page 34.
Step 2	Assign the required administrator permissions to the CloudLink service account.	See "Assigning administrator permissions for the CloudLink service account" on page 35.
Step 3	If forms-based authentication is enabled, configure remote login for forms-based authentication.	See "Configuring Exchange Server 2003 for remote login with forms-based authentication" on page 36.

Ensuring that the WebDAV protocol is enabled

You must ensure that the WebDAV protocol is enabled on each Exchange Server 2003 server with which you want to use CloudLink.

To check whether WebDAV is enabled

1. On the Exchange 2003 server, go to **Start** > **Run**.
2. In the **Run** dialog, type **inetmgr**, and then click **OK** to open the Internet Information Services (IIS) Manager MMC Snap-in.
3. In the left pane of IIS Manager, select **Web Service Extensions**.
4. In the Web Service Extensions list in the right pane, check whether **WebDAV** is set to **Allowed**.
5. If WebDAV is not set to allowed, enable the WebDAV protocol.

   See "To enable the WebDAV protocol" on page 34.

To enable the WebDAV protocol

1. On the Exchange 2003 server, go to **Control Panel** > **Add or Remove Programs**.
2. Run the Windows Components Wizard.

3 Go to **Application Server** > **Internet Information Services** > **World Wide Web Service**.

4 In the **World Wide Web Service** dialog, select the check box for the **WebDAV Publishing** subcomponent, and then click **OK**.

Assigning administrator permissions for the CloudLink service account

The CloudLink service account requires some specific administrator permissions on the Exchange Server.

To assign administrator permissions for the CloudLink service account

1 Go to **Start** > **Programs** > **Microsoft Exchange** > **System Manager**.

2 In the left pane of Exchange System Manager, expand the **Administrative Groups** folder and then expand **Servers**.

3 Right-click the name of the Exchange server, and select **Properties**.

4 In the **Properties** dialog, select the **Security** tab.

5 If the CloudLink service account is not listed in the **Group or user names** box, add the account as follows:

- Click **Add**.
- In the **Select Users, Computers or Groups** dialog, select the CloudLink service account and click **OK**.

6 In the **Group or user names** box, select the CloudLink service account.

7 In the **Permissions for *CloudLink_service_account*** box, ensure that the following **Allow** check boxes are all selected:

- **Read**
- **Write properties**
- **List content**
- **Execute**
- **Send As**
- **Read properties**
- **Read permissions**
- **Write**
- **Receive As**
- **Add/remove self**

- **Delete**

8 In the **Permissions for *CloudLink_service_account*** box, ensure that no **Deny** check boxes are selected.

9 Click **OK** to save the permissions for the CloudLink service account.

Configuring Exchange Server 2003 for remote login with forms-based authentication

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Note: This step is required only if forms-based authentication is enabled.

Due to security restrictions, CloudLink does not store the service account password. CloudLink must log in remotely to process the Exchange mailboxes.

To configure Exchange Server 2003 for remote login with form-based authentication

1 Go to **Start** > **Programs** > **Microsoft Exchange** > **System Manager**.

2 In the left pane of Exchange System Manager, expand the **Administrative Groups** folder and then expand **Servers**.

3 For a server that has Form Based Authentication enabled, expand **Protocols**.

4 Select the **HTTP** folder, right-click and then select **HTTP Virtual Server**.

5 In the **Properties** dialog, do as follows:

- In the **Name** box, type a name for the new virtual server, such as **CloudLink Virtual Server**.
- In the **IP address** area, click **Advanced**

6 Select **(All unassigned)** from the identities list, and click **Modify**.

7 In the **Identification** dialog, change the **TCP port** to a different value, for example **90**.

Note: The port for the new virtual server must be different than the one used for the forms-based authentication virtual server. The port for the new virtual server is used for registering the server in CloudLink.

---

8 Click **OK**.

9 Select the new virtual server, right-click and then select **New** > **Virtual Server Directory**.

10 In the **Name** box of the **Properties** dialog, type in the name **exchange**, and then click **OK**.

11 Run `iisreset` from the command prompt to restart the IIS server.

Configuring Exchange Server 2007, 2010, 2013, and 2016 servers for CloudLink

You must perform some configuration steps on each Exchange Server 2007, 2010, 2013, or 2016 server that you want to use with CloudLink.

Table 7-3 lists the configuration steps.

Table 7-3 Steps to configure Exchange Server 2007, 2010, 2013, and 2016 for CloudLink

Step number	Action	Reference
Step 1	Set the rights for the CloudLink service account to enable it to create and remove Insight Personal Archive web folders.	See “Setting the rights for the CloudLink service account to create and remove web folders” on page 37.
Step 2	For Exchange 2007 and Exchange 2010 servers, enable Insight Personal Archive web folders in OWA, if required. Note: Exchange Server 2013 OWA and Exchange Server 2016 OWA do not support web folders.	See “Enabling Insight Personal Archive web folders in OWA” on page 38.

Setting the rights for the CloudLink service account to create and remove web folders

The CloudLink service account must have rights on the Exchange server to create and remove web folders for users. To set the rights you must run the required command or commands from the Exchange Management Shell.

To set the rights for the CloudLink service account to create and remove web folders

1 On the Exchange server, run the Exchange Management Shell.

2 Execute the required command or commands from the shell window.

- For Exchange Server 2007 you must configure the required user access rights for all the Client Access server and for every back-end mailbox.
- For Exchange Server 2010, 2013, and 2016 you must configure a global role to provide the required application impersonation rights.

Table 7-4 lists the required commands for the different versions of Exchange server.

Table 7-4 Commands to set the rights for the CloudLink service account on the Exchange Server

Exchange server version	Commands to set the rights for the CloudLink service account

Exchange 2007	`Get-ExchangeServer | where {$_.IsClientAccessServer -eq $TRUE} | ForEach-Object {Add-ADPermission -Identity $_.distinguishedname -User (Get-User -Identity` *`serviceAccountUser`* `| select-object).identity -extendedRight ms-Exch-EPI-Impersonation}`
	
	`Get-MailboxDatabase | ForEach-Object {Add-ADPermission -Identity $_.DistinguishedName -User` *`serviceAccountUser`* `-ExtendedRights ms-Exch-EPI-May-Impersonate}`

Exchange 2010, 2013, and 2016	`New-ManagementRoleAssignment -Name` *`impersonationAssignmentName`* `-Role applicationImpersonation -User` *`domain\serviceAccountUser`*

Where:

- *`impersonationAssignmentName`* is a suitable unique name for the impersonation assignment.
- *`domain`* is the Windows domain where the CloudLink service account resides.
- *`serviceAccountUser`* is the user name of the CloudLink service account.

Enabling Insight Personal Archive web folders in OWA

If you want Exchange Server 2007 OWA or Exchange Server 2010 OWA to be able to include Insight Personal Archive web folders, you must add some files to the OWA installation folder on the Exchange server.

Note: Exchange Server 2013 OWA and Exchange Server 2016 OWA do not support web folders. This procedure applies to Exchange Server 2007 and Exchange Server 2010 only.

To enable Insight Personal Archive web folders in OWA

1. Open the CloudLink installation package that you downloaded.
2. Go to the **setupfiles** folder and find the following files:
   - `webfolder.aspx`
   - `webfolder.aspx.cs`
   - `registry.xml`
3. Copy these files to the OWA installation folder on the Exchange server. The location for the Outlook Web Access installation folder varies depending on the Exchange server version:
   - For Exchange Server 2007:
     C:\Program Files\Microsoft\ExchangeServer\ClientAccess\Owa\forms\Customization
   - For Exchange Server 2010:
     C:\Program Files\Microsoft\ExchangeServer\v14\ClientAccess\Owa\forms\Customization
4. From a command prompt run `iisreset` to restart the IIS server.

Starting and closing the CloudLink application

You can start and close the CloudLink application as follows.

Note: 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.

Configuring CloudLink for Microsoft Exchange

You must configure CloudLink to work with Arctera Insight Archiving and with your Active Directory and Exchange environment.

CloudLink configuration wizard steps for Microsoft Exchange

Table 7-5 lists the steps in the CloudLink configuration wizard that apply to an Exchange environment. When you select the configuration tasks in the first step of the configuration, CloudLink lists the remaining steps that you need to complete. Some of the steps are required only if you select the related configuration task.

Table 7-5 CloudLink configuration steps for Microsoft Exchange

Configuration step	Action	Reference
Select Configuration Task(s)	Select the tasks that you want CloudLink 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 an Exchange environment” on page 43.
Specify CloudLink Service Account	Provide the credentials of the Windows service account.	See “Specifying the CloudLink service account” on page 46.

Table 7-5 CloudLink configuration steps for Microsoft Exchange *(continued)*

Configuration step	Action	Reference
Register Domain Controller	Register a domain controller from each domain in the Active Directory forest from which you want to select users or groups to synchronize.	See "Registering the domain controllers" on page 46.
Cloud Archive Credential	Specify the credentials for the Management Console login account that has the System Administrator role.	See "Specifying the Management Console credentials" on page 49.
Configure Sync Properties	Select which properties to synchronize from Active Directory to Arctera Insight Archiving.	See "Configuring the Active Directory properties to synchronize" on page 49.
Additional AD Sync Options	Determine what happens to Arctera Insight Archiving archive accounts if the associated Active Directory account is disabled, deleted, or moved from the Organizational Unit.	See "Configuring the additional Active Directory synchronization options" on page 50.
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 53.
Choose Exchange Servers	Provide the information to enable CloudLink to establish a connection with the Exchange servers whose mailboxes require Insight Personal Archive web folders. Note: This step is shown if you select the **Web Folder Management Configuration** task.	See "Choosing the Exchange Server settings for web folder management" on page 53.
Web Folder Properties	Specify the details for the Insight Personal Archive web folder that CloudLink adds to user mailboxes. Note: This step is shown if you select the **Web Folder Management Configuration** task.	See "Configuring the web folder properties" on page 54.
Report Management	Configure the CloudLink log settings and report settings.	See "Configuring report management and logging" on page 55.

Table 7-5 CloudLink configuration steps for Microsoft Exchange *(continued)*

Configuration step	Action	Reference
Welcome Message Template	Configure the template for Insight Personal Archive welcome email messages that CloudLink sends. Note: This step is shown only if you select the **Welcome Message Template** configuration task.	See "Configuring the welcome message template" on page 56.

Additional manual configuration steps

You may need to perform the following configuration steps in addition to those performed through the configuration wizard.

Table 7-6 CloudLink manual configuration step for Microsoft Exchange

Manual configuration step	Description	Reference
To disable Insight Personal Archive login or login and archiving for accounts with disabled mailboxes	By default CloudLink archives from disabled Exchange mailboxes. If you want to disable Insight Personal Archive login or both login and archiving for accounts with disabled Exchange mailboxes, you must perform a manual configuration step.	See "Disabling Insight Personal Archive login and archiving for accounts with disabled mailboxes" on page 57.
To disable Insight Personal Archive login or login and archiving for users who leave distribution groups that are targeted with a Group-based Sync	By default an CloudLink recurring task continues to archive from users who leave the distribution groups that a Group-based Sync targets. If you want to disable Insight Personal Archive login or both login and archiving for these accounts, you must perform a manual configuration step.	See "Disabling Insight Personal Archive login and archiving for users who leave distribution groups that are targeted with Group-based Sync" on page 60.
To synchronize the delegation permission for a user or a shared mailbox with delegates from different active directory domains	By default this functionality is enabled. To enable or disable this functionality, you need to configure the **ResolveCrossDomainDelegates** setting in the **ArchiveTools.CloudLink.Server.exe.config** file.	See "Synchronizing the delegation permission for a user or a shared mailbox with delegates from different active directory domains" on page 22.

Table 7-6 CloudLink manual configuration step for Microsoft Exchange *(continued)*

Manual configuration step	Description	Reference
To synchronize additional email aliases from the active directory extension attribute	You need to specify the name of active directory attribute that needs to be used for additional SMTP aliases. In case of multiple attribute values, use semicolon (;) delimiter.	See "Synchronizing additional email aliases from the Active Directory Extension attribute" on page 52.

Selecting the CloudLink configuration tasks for an Exchange environment

To begin the configuration of CloudLink, or to review or update the configuration, you must select the tasks that you want CloudLink to perform. CloudLink can then display the required configuration steps.

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

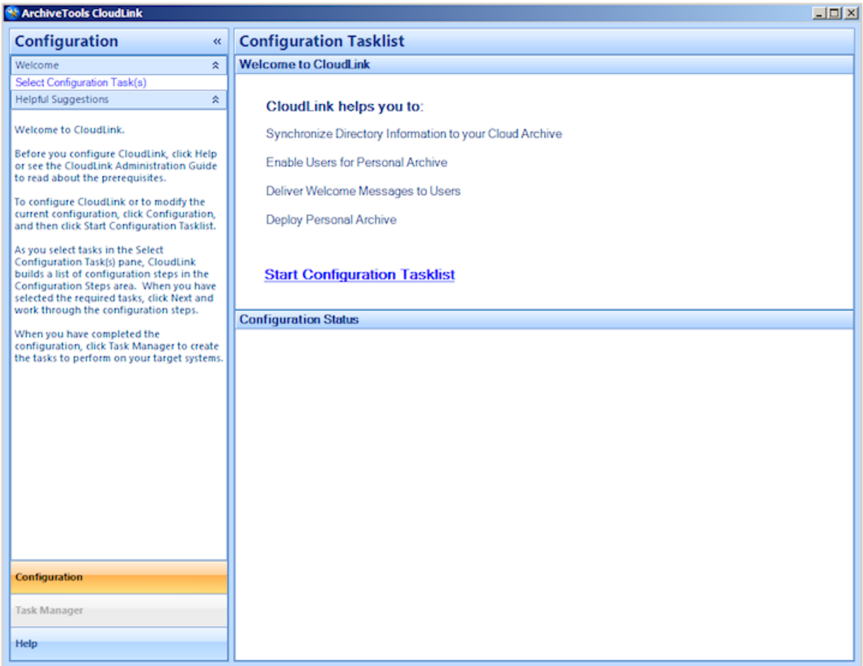
To select the CloudLink configuration tasks

1. Start CloudLink, if it is not already started.

   See "Starting and closing the CloudLink application" on page 39.

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

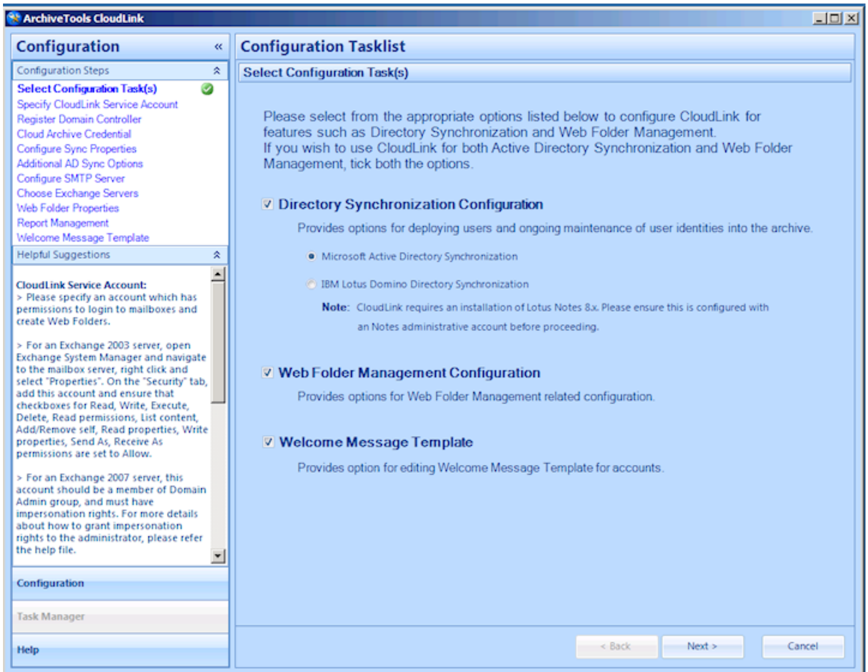
   The **Welcome to CloudLink** page shows the current configuration status of CloudLink. If you have performed any CloudLink configuration steps previously, the **Configuration Status** area lists any configuration steps that you have yet to complete.



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 an Exchange environment, select **Directory Synchronization Configuration**, and then select **Microsoft Active Directory Synchronization**.

- If you want CloudLink to create and manage Insight Personal Archive web folders for your users, select **Web Folder Management Configuration**
- If you want CloudLink to be able to send welcome messages to users who receive Insight Personal Archive archives, select **Welcome Message Template**.



As you select or deselect 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 check mark icon any steps that you have successfully completed.
- When you have finished the configuration you can return to a step to change its values if necessary.
- The **Helpful Suggestions** area of each configuration page displays tips on how to complete that step.

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 "Creating a CloudLink service account for an Exchange environment" on page 33.

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

Registering the secondary domain controllers (Optional)

This option lets you register secondary domain controllers for a main (primary) domain. In the event of a primary domain controller failure due to reasons like a network outage, the secondary domain controller assumes control and manages the synchronization of user and group data.

Prerequisite

Before you start registering secondary domains, do the following:

1. Stop the *ArchiveTools CloudLink Server* service.
2. In the *ArchiveTools.CloudLink.Server.exe.config* file, locate the *AllowSecondaryDomainControllers* property.
3. Confirm if the property value is set to *True*.

   If it is already set as *True*, do not change it. If it is set to *False* (by default it is set to *False*), change it to *True*.

To register a secondary domain controller

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

2 Ensure that the CloudLink service account is included in the Active Directory Forest where the user accounts are located.

   By default, CloudLink uses the CloudLink service account to establish a connection with the Active Directory Forest. If the CloudLink service account is not included, perform the following steps:

   - Clear the **Use current system account** check box.
   - In the **Forest Name** field, enter the root domain name.
   - In the **Username** and **Password** fields, enter the credentials of a *Domain Administrator* for the specified domain.
   - Lastly, click **Search Domain**.
     CloudLink then displays a list of domains and their domain controllers for the specified forest, in the drop-down lists.

3 From the **Domain** drop-down list, select a domain from which you want to synchronize the user accounts with Alta Archiving.

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

   For optimal performance, it is recommended to choose the domain controller closest to the CloudLink server.

5 Select the **Primary** check box.

6 Click Add.

   - If the **Use current system account** check box is not selected, CloudLink uses the credentials specified in step 2.
   - If the **Use current system account** check box is selected, CloudLink displays a **Configure Domain Controller** dialog box. Enter the username and password of an account that belongs to the **Domain Admins** group in the domain, for example, the CloudLink service account.

Note: CloudLink includes this domain controller as a secondary domain controller under **Registered Domain(s)**. You can add multiple secondary domain controllers for a primary domain. Depending on your selection, if the domain controller is selected as a primary controller, the **Primary** column displays *Yes*. If the domain controller is not selected as a primary controller, the *Primary* column displays *No*.

---

7. Follow the above-mentioned steps for each domain within the Active Directory Forest to synchronize users with Arctera Insight Archiving.
8. Click **Next** to save your changes and proceed to the next configuration step.

Specifying the Management Console credentials

In the **Cloud Archive Credential** configuration step you must specify the credentials of the Management Console login account. The account must have the System Administrator administration role in the Management Console.

To specify the Management Console account credentials

1. Go to the **Cloud Archive Credential** configuration step.
2. In the **Username** box, type the name of the Management Console account.
3. In the **Password** box, type the password of the Management Console account.
4. In the **Region** drop-down list, select your Arctera Insight Archiving geographical region.

   If you do not know the region to which you are assigned, contact Arctera Services & Support.

   Note: The region names have changed at version 4.0.3.

   See "Should I upgrade to CloudLink 4.1.x?" on page 12.

   ---

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

Configuring the Active Directory properties to synchronize

In the **Configure Sync Properties** configuration step you must select which Active Directory properties to synchronize with Arctera Insight Archiving.

Note: For most organizations the default setting to synchronize all basic properties is appropriate.

Note: If **UserPrincipalName** is selected under **Advanced Properties**, it is synchronized as the Username in Arctera Insight Archiving. If your organization uses single sign-on access (SSO), this synchronization can cause logins to fail when **UserPrincipalName** differs from the Primary SMTP address.

Some properties must be synchronized, and so cannot be deselected.

To configure the Active Directory properties to synchronize

1. Go to the **Configure Sync Properties** configuration step.
2. By default **Basic Properties** is selected. For most organizations this is sufficient. If you want to include advanced properties in the Properties to Sync table, click **Advanced Properties**.
3. Select the properties that you want to synchronize. Do not deselect any property unless you are sure that it should not be synchronized. Some properties such as **mail**, **objectGUID**, and **distinguishedName** cannot be deselected.
4. Click **Next** to save your choices and continue.

Configuring the additional Active Directory synchronization options

The **Additional AD Sync Options** configuration step provides the following settings to control whether CloudLink disables Insight Personal Archive login or both login and archiving under certain circumstances:

For user accounts disabled in Active Directory	This setting applies to both non-recurrent and recurrent CloudLink tasks, when they synchronize a user account that is disabled in Active Directory. CloudLink ignores this setting for all Active Directory accounts that are associated with linked mailboxes. This setting also determines the effect of the **Disable Archive** setting in CloudLink Task Manager. See "Selecting the actions for a task to perform in an Exchange environment" on page 80.

For user accounts deleted in Active Directory	This setting applies only to any recurrent CloudLink tasks that synchronize the account before the deletion, and then run again after the deletion. For CloudLink to recognize the change, the same recurrent task must run before and after the account deletion. Note: CloudLink has no visibility of expired Active Directory accounts.
For user accounts leaving an Organizational Unit selected for synchronization	This setting applies only to any recurrent CloudLink tasks that synchronize the Organizational Unit before the account leaves, and then run again after the account has left. For CloudLink to recognize the change, the change to be recognized, the same recurrent task must run before and after the change.

For each setting you can choose from the following options:

Do nothing	CloudLink makes no changes to the Arctera Insight Personal Archive login, or to the Arctera Insight Archiving archiving settings for the user account.
Disable Arctera Insight Personal Archive Login	CloudLink disables the Arctera Insight Personal Archive login for the user account. New emails continue to be archived to the account. Archived emails remain accessible for eDiscovery.
Disable Arctera Insight Archiving Archiving and Login	CloudLink disables the Arctera Insight Personal Archive login for the user account. New emails are not archived to the account. Archived emails remain accessible for eDiscovery. CloudLink renames the account as follows: `username-Disabled_On_timestamp`

To configure the additional Active Directory synchronization options

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

2 Choose the required option for each setting:

- **For user accounts that are disabled in Active Directory**.
  The default option is **Disable Arctera Insight Personal Archive Login**.
- **For user accounts that become deleted in Active Directory**.
  The default option is **Disable Arctera Insight Personal Archive Archiving and Login**.
- **For user accounts that leave an Organizational Unit that is selected for synchronization**.

The default option is **Do nothing**.

3 Click **Next** to save your choices and continue.

About accounts that are associated with linked mailboxes

For accounts that are associated with linked mailboxes CloudLink ignores the **For user accounts disabled in Active Directory** setting. With linked mailboxes the local Active Directory account is always in a disabled state.

If you want deliberately to disable Insight Personal Archive login or both login and archiving for an account that is associated with a linked mailbox, you can do as follows:

- Disable the linked mailbox.
- In addition, configure CloudLink to disable Insight Personal Archive login or login and archiving for all accounts with disabled mailboxes.
  See "Disabling Insight Personal Archive login and archiving for accounts with disabled mailboxes" on page 57.

Synchronizing additional email aliases from the Active Directory Extension attribute

To synchronize the additional email aliases from the Active Directory Extension attribute

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

2 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.

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

4 Specify the name of active directory extension attribute in **AttributeForAdditionalEmailAliases** setting that is used for additional SMTP aliases.

Note: Ensure that the attribute name specified here matches with the extension attribute used for storing additional SMTP aliases in that environment.

---

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

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.

Choosing the Exchange Server settings for web folder management

In the **Choose Exchange Server settings** configuration step you must provide the information to enable CloudLink to connect with each Exchange server whose mailboxes require Insight Personal Archive web folders.

For an Exchange Server database availability group (DAG), you must provide the details for each Exchange mail server in the DAG.

Note: The **Choose Exchange Server settings** configuration step is shown only if you selected the **Web Folder Management Configuration** task on the **Select Configuration Task(s)** page.

To choose the Exchange Server settings for web folder management

1. Go to the **Choose Exchange Server settings** configuration step.
2. In **Available Email Server(s) on the domain**, select an Exchange server whose user mailboxes require Insight Personal Archive web folders, and then click **Add**.
3. In the **Configure Exchange Service Account** dialog, **Use Default Service Account** is selected by default. Keep this option selected unless you want to use an account other than the CloudLink service account that you specified in the **Specify CloudLink Service Account** step. If you want to use a different account, clear the check box and enter the credentials of an alternative account.
4. Click **Ok** on the configure **Exchange Service Account** dialog to save the service account details.

   The **Selected Email Server(s)** section displays a row of information relating to the mail server you selected.
5. Double-click the cell in the **CAS Name** column, and enter the Client Access server name for the Exchange mailbox server. If you have a CAS array, enter the array name.
6. Double-click the cell in the **Email Address** column, and type the primary email address of a user who has a mailbox on the mailbox server.
7. Select the table row and click **Run Validation** to test the connection to the Exchange server.

   If the server connection is successful the **Connection Status** column indicates success, and the port number displays in the **Port** column.

   Note: If you want to disconnect a mailbox server, select the entire row for the server in **Selected Email server(s)** and then click **Remove**.

   ---
8. Repeat steps 2 to 7 for each Exchange server whose user mailboxes require Insight Personal Archive web folders.
9. Click **Next** to save the Exchange server web folder settings and continue to the next step.

Configuring the web folder properties

In the **Web Folder Properties** configuration step you must specify the details for the Insight Personal Archive web folder that CloudLink adds to user mailboxes.

Note: The **Web Folder Properties** configuration step is shown only if you selected the **Web Folder Management Configuration** task on the **Select Configuration Task(s)** page.

To configure the web folder properties

1. Go to the **Web Folder Properties** configuration step.
2. In the **Name** box, enter a folder name for the Insight Personal Archive web folder.
3. In the **Region** box, select your Arctera Insight Archiving geographical region.

   Note: The region names have changed at version 4.0.3.

   See "Should I upgrade to CloudLink 4.1.x?" on page 12.

4. The **URL** box displays a URL based on the selected region. If you use Active Directory Federated Services (ADFS) for single sign-on to Insight Personal Archive, update the URL to specify the appropriate application login URL.
5. In the **Folder Path** box, select one of the following locations for the web folder:
   - **Mailbox**, for a top-level folder
   - **Inbox**, for a subfolder within the user's Inbox.
6. To have the web folder located as a subfolder in a specified location, select the **As a Sub Folder of** check box, and type the parent folder name in the text box.
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 119.

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 61.

Configuring the welcome message template

In the **Welcome Message Template** configuration step you configure the template for the Insight Personal Archive 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 Insight Personal Archive. 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 Insight Personal Archive.

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 pull 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 61.

Disabling Insight Personal Archive login and archiving for accounts with disabled mailboxes

You can manually configure CloudLink to disable Insight Personal Archive login or both login and archiving for accounts whose Exchange mailboxes become disabled.

- See Disabling Insight Personal Archive login and archiving for accounts with disabled mailboxes on Exchange 2007, 2010, 2013, and 2016.
- See Disabling Insight Personal Archive login and archiving for mail-disabled users on Exchange 2003.

Disabling Insight Personal Archive login and archiving for accounts with disabled mailboxes on Exchange 2007, 2010, 2013, and 2016

In Exchange 2007, 2010, 2013, and 2016, a mailbox may be set to **Disabled**. By default CloudLink archives from Active Directory accounts regardless of this **Disabled** mailbox setting. If you want to disable Insight Personal Archive login or both login and archiving for accounts whose mailboxes become disabled, you can set the `MailboxDisabledAction` parameter in the CloudLink configuration file.

This CloudLink configuration file parameter has no effect on Exchange 2003.

Note: If you use Group-based Sync we recommend that you set the `MailboxDisabledAction` parameter and the `LeaveCustomQueryOption` parameter to the same value.

See "Disabling Insight Personal Archive login and archiving for users who leave distribution groups that are targeted with Group-based Sync" on page 60.

To disable Insight Personal Archive login or login and archiving for accounts with disabled mailboxes on Exchange 2007, 2010, 2013, and 2016

1. Go to the folder in which CloudLink is installed, typically **C:\Program Files\ArchiveTools\CloudLink**.
2. 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.
3. Use a text editor such as Notepad to open **ArchiveTools.CloudLink.Server.exe.config**.
4. Find the **<appSettings>** section of the file, and add the following entry within it:

   ```
   <add key="MailboxDisabledAction" value="n" />
   ```

   Where *n* is an integer that determines the behavior for any mailboxes that are set to Disabled in the Exchange Management Console, as follows:

   - `2`: Do nothing. This behavior is also the default when the parameter is not set in the configuration file.
   - `0`: Disable Insight Personal Archive login, but do not disable archiving.
   - `3`: Disable both Insight Personal Archive login and archiving.

5 Save the changes to the configuration file.

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

Note: For CloudLink to identify that an account's mailbox is disabled, the same recurrent CloudLink task must synchronize the account both before and after the mailbox is disabled.

Disabling Insight Personal Archive login and archiving for mail-disabled users on Exchange 2003

If you want to disable Insight Personal Archive login or login and archiving for mail-disabled users on Exchange 2003, you can perform the following procedure.

To disable Insight Personal Archive login or login and archiving for mail-disabled users on Exchange 2003

1 Identify all the Exchange 2003 mail-disabled users, and create a separate Active Directory Organizational Unit that contains only those users.

2 In the CloudLink configuration task list, in the **Additional AD Sync Options** step, ensure that the setting **For user accounts disabled in Active Directory** is set to one of the following, as required:

- **Disable Arctera Insight Personal Archive Login**
- **Disable Arctera Insight Archiving archiving and Login**

See "Configuring the additional Active Directory synchronization options" on page 50.

Note: If you change this configuration setting, the change affects all CloudLink tasks that use this setting, including any existing scheduled and recurring tasks.

---

3 Run the CloudLink Task Manager wizard, and create a new task specifically to disable archiving for disabled Exchange 2003 mailbox users. When you configure the task, do as follows:

- On the **Select User(s) or Group(s)** page, select the Organizational Unit that you created in step 1.
- Then, on the **Select Action(s)** page, select only **Disable Archive**.
- Select a suitable schedule for the task.

See “Creating CloudLink tasks for Exchange” on page 66.

When the task runs it disables Insight Personal Archive login, or archiving and login for all of the users in the specified Organizational Unit.

Disabling Insight Personal Archive login and archiving for users who leave distribution groups that are targeted with Group-based Sync

You can use a Group-based Sync in the Task Manager wizard to target a distribution group for a CloudLink task. A Group-based Sync enables a recurring task to reflect changes to the distribution group membership.

See “Selecting users, groups, or OUs from the Task Manager Wizard” on page 69.

If you use tasks that employ a Group-based Sync you can configure what happens to the archive accounts of users who leave a distribution group that a Group-based Sync targets. The configuration options are as follows:

- Do nothing. This behavior is the default. Archiving and Insight Personal Archive are not disabled.
- Disable Insight Personal Archive login, but do not disable archiving.
- Disable both Insight Personal Archive login and archiving.

To configure the required behavior you must edit the CloudLink configuration file to set the corresponding value for the `LeaveCustomQueryOption` parameter.

Note: We recommend that you set the `LeaveCustomQueryOption` parameter and the `MailboxDisabledAction` parameter to the same value.

See “Disabling Insight Personal Archive login and archiving for accounts with disabled mailboxes” on page 57.

To disable Insight Personal Archive login or login and archiving for users who leave distribution groups that are targeted with Group-based Sync

1. Go to the folder in which CloudLink is installed, typically **C:\Program Files\ArchiveTools\CloudLink**.
2. 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.
3. Use a text editor such as Notepad to open **ArchiveTools.CloudLink.Server.exe.config**.
4. Find the **<appSettings>** section of the file, and look for the following entry within it:

```
<add key="LeaveCustomQueryOption" value="2" />
```

Edit the entry to change the value as required, to set the behavior for users who leave a distribution list, as follows:

- `2`: Do nothing. This behavior is the default.
- `0`: Disable Insight Personal Archive login, but do not disable archiving.
- `3`: Disable both Insight Personal Archive login and archiving.

5 Save the changes to the configuration file.

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

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 Task(s)** 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.

Chapter 8

Creating CloudLink tasks for Exchange

This chapter includes the following topics:

About creating CloudLink tasks for Exchange

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

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

- The users, groups, or Organizational Units to act on
- The synchronization actions to perform

- When the task is to run. You can choose to run the task immediately or at a set time, and on a recurring schedule if you want.

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.

   See "Starting and closing the CloudLink application" on page 39.

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.

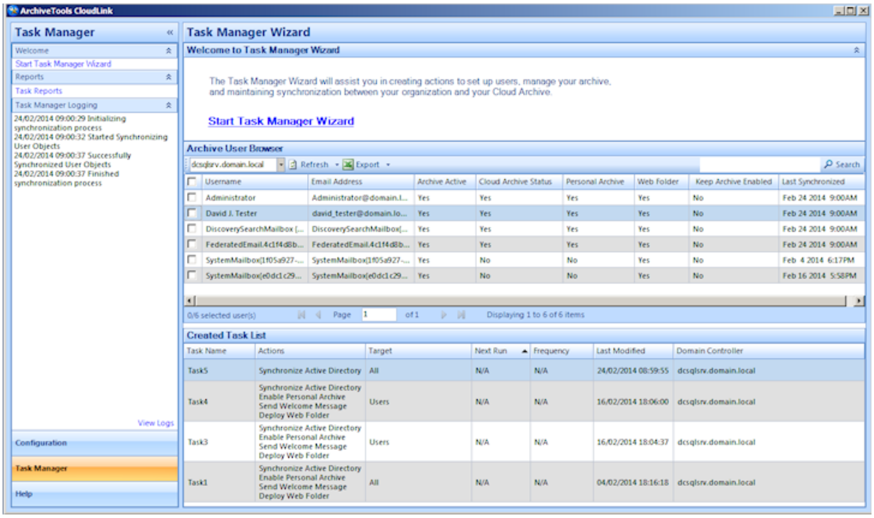
   CloudLink displays the **Welcome to Task Manager Wizard** page.

About the Task Manager Welcome page and the Archive User Browser in an Exchange environment

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 Arctera Insight Archiving.
- 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 and web folder deployments.

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 Arctera Insight Archiving. 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 8-1 shows the information that the Archive User Browser displays for each user.

Table 8-1 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 Insight Personal Archive is set to enabled. **No**: Access to Insight Personal Archive is set to disabled.
Web Folder	**Yes**: A Insight Personal Archive web folder is set to enabled. **No**: A Insight Personal Archive web folder is set to disabled.
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: The last synchronization time can be different for different users. You get only the modified account details from the last synchronization time to optimize the cloud archive status synchronization. See “Optimizing the cloud archive status synchronization” on page 121.

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 121.

Created Task List

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

See "About managing tasks and monitoring their results" on page 113.

Task Manager Logging

The **Task Manager Logging** area posts information about synchronizations and Insight Personal Archive web folder deployments as they happen, and provides links to the task reports and the CloudLink logs.

See "Viewing the task reports" on page 118.

Creating CloudLink tasks for Exchange

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 8-2 lists the steps that are required to create a task for Exchange. The Task Manager wizard takes you through the process.

Table 8-2 Creating a CloudLink task

Action	Reference
Select the Active Directory users, groups, or Organizational Units on which to perform the task.	See "Selecting the Active Directory users, groups, or OUs to perform a task" on page 67.
Allow remote account management by CloudLink, if required.	See "About granting remote account management for CloudLink" on page 80.
Select the actions for the task to perform.	See "Selecting the actions for a task to perform in an Exchange environment" on page 80.

Table 8-2 Creating a CloudLink task *(continued)*

Action	Reference
Deselect actions for specific users, if required.	See “Deselecting task actions for specific users or groups” on page 82.
Configure the web folder properties, if required.	See “Configuring the web folder properties for a task” on page 83.
Name and schedule the task.	See “Naming and scheduling a task” on page 84.

Selecting the Active Directory users, groups, or OUs to perform a task

Task Manager provides the following ways to select the users, groups, or Organizational Units (OUs) to perform a task:

- Select users and groups from the Archive User Browser.
  See “Selecting users and groups from the Archive User Browser” on page 67.
- Select users, groups, or entire Organizational Units from the Task Manager Wizard.
  See “Selecting users, groups, or OUs from the Task Manager Wizard” on page 69.

Selecting users and groups from the Archive User Browser

You can use CloudLink's Archive User Browser to select users and groups on which to perform a task in an Exchange environment.

To select users and groups from the Archive User Browser

1. At the bottom of CloudLink's left pane, click **Task Manager** to display the **Welcome to Task Manager Wizard** page.
2. In the **Archive User Browser** area, select the required domain from the drop-down list of domains.
3. If you want to ensure that the browser reflects any recent changes in Active Directory, you can refresh CloudLink's database from Active Directory. To refresh the database from Active Directory, click the **Refresh** drop-down 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.

4 Select the users and groups for the task in one of the following ways:

To select all the current users and groups in the domain	Select the check box in the table header row to the left of the **Username** header. 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 one or more users or groups	Select the check box for one or more users or groups from the displayed list.
To search for users or groups	Enter some search text in the Archive User Browser's **Search** box and click **Search**. From the list of matching users and groups, select the check boxes for the required users and groups. Note: Searches are performed on the user name or group name only. Your search string must match the name from the beginning. For example, a search on the string **Dav** matches **David Smith** and **Davinia Jones**, but not **John Davidson**. Wildcard search characters are not supported.

5 Right-click the list of users and groups, and select **Create Task** to launch the **Select Action(s)** step of the Task Manager Wizard.

See "Selecting the actions for a task to perform in an Exchange environment" on page 80.

Note: If a dialog about 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 80.

Selecting users, groups, or OUs from the Task Manager Wizard

In an Exchange environment the CloudLink Task Manager Wizard provides a way to select the users, groups, or Organizational Units (OUs) on which to perform a task.

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

Group-based Sync is useful for recurring tasks, as it can take into account changes in distribution group membership.

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

See "Selecting the actions for a task to perform in an Exchange environment" on page 80.

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 80.

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.

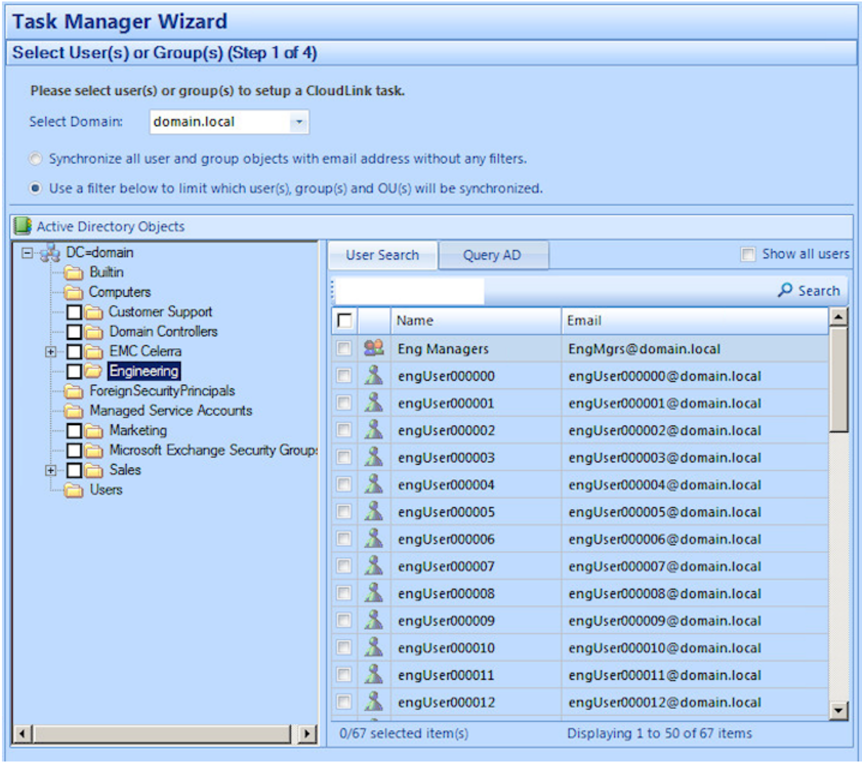
2 Click **Start Task Manager Wizard**.

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

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

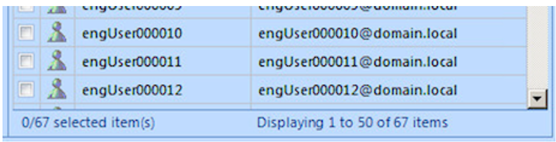
4 Select **Use a filter below to limit which user(s), group(s) and OU(s) will be synchronized**.

5 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.

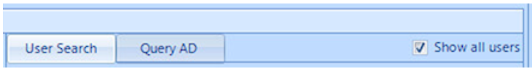


The information bar at the bottom of the **User Search** pane shows the following, for the currently highlighted OU:

- How many items are currently selected out of the total.
- How many items are currently displayed out of the total.

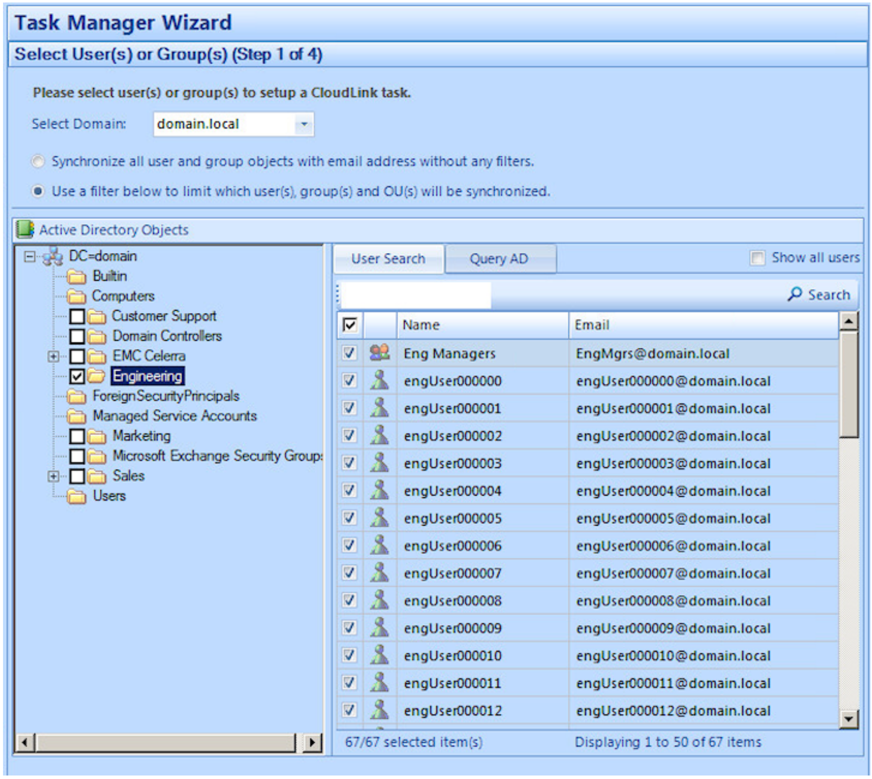


Note: By default the **User Search** pane displays only the first 50 items in the highlighted OU. To display all of the items, select the **Show all users** check box. Note however that the full list may take some time to appear if the OU has a large number of users and groups.



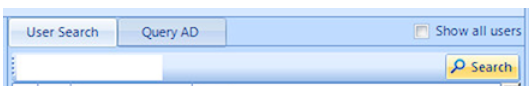
6 Select the required items as follows:

- 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.

---

7 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 task to perform in an Exchange environment" on page 80.

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 80.

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 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**.

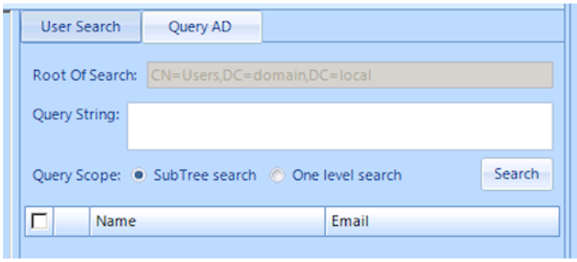
The wizard's **Select User(s) or Group(s)** step appears.

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

5 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.



6 In the **Query String** box, enter an LDAP query string.

7 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.

8 Click **Search**.

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

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

See "Selecting the actions for a task to perform in an Exchange environment" on page 80.

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 80.

Selecting 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. It can take account of changes in distribution group membership, including the removal and addition of members. Group-based Sync can therefore be used with recurring tasks to maintain the synchronization of a distribution group.

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.

Note: If you use Group-based Sync you must configure the action for CloudLink to take when users leave a targeted distribution group.

See "Disabling Insight Personal Archive login and archiving for users who leave distribution groups that are targeted with Group-based Sync" on page 60.

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**.

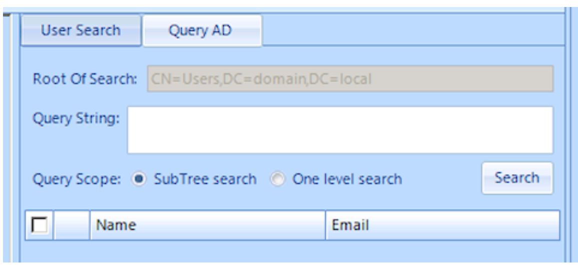
  The wizard's **Select User(s) or Group(s)** step appears.

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

5 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.



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

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

  OR

  `(&(objectClass=group)(|(&(groupType:1.2.840.113556.1.4.803:=2147483648)(mail=*))(!(groupType:1.2.840.113556.1.4.803:=2147483648))))`

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.

7 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.

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

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

See "Selecting the actions for a task to perform in an Exchange environment" on page 80.

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 80.

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

To select the members of a dynamic 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 In the **Active Directory Objects** area, select the **Query AD** tab.

5 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.

6 In the **Query String** box, enter value of *msExchDynamicDLFilter* attribute of dynamic distribution group. You can get this value from “Active Directory User and Computer” tool on domain controller. Below are steps to get this value

See the section called “Getting the msExchDynamicDLFilter attribute value of dynamic distribution group” on page 77.

7 A **Query Scope** option is not applicable for dynamic distribution list. However, you have to select **SubTree search**.

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

9 Click **Next** to save the query and continue to the Select Action(s) page. See “Selecting the actions for a task to perform in an Exchange environment” on page 80.

Note: CloudLink can provision only those users which are directly a part of the selected dynamic distribution group.

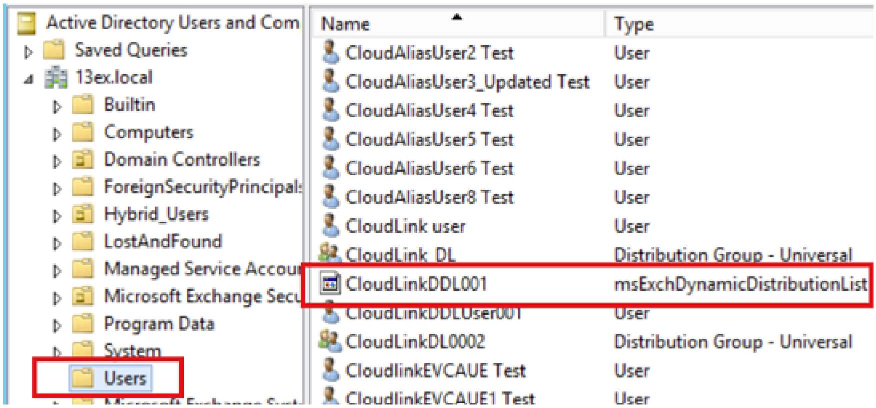
Getting the msExchDynamicDLFilter attribute value of dynamic distribution group

You need to provide this value while configuring the members of a dynamic distribution group using Group-based Sync.

To get the msExchDynamicDLFilter attribute value of dynamic distribution group

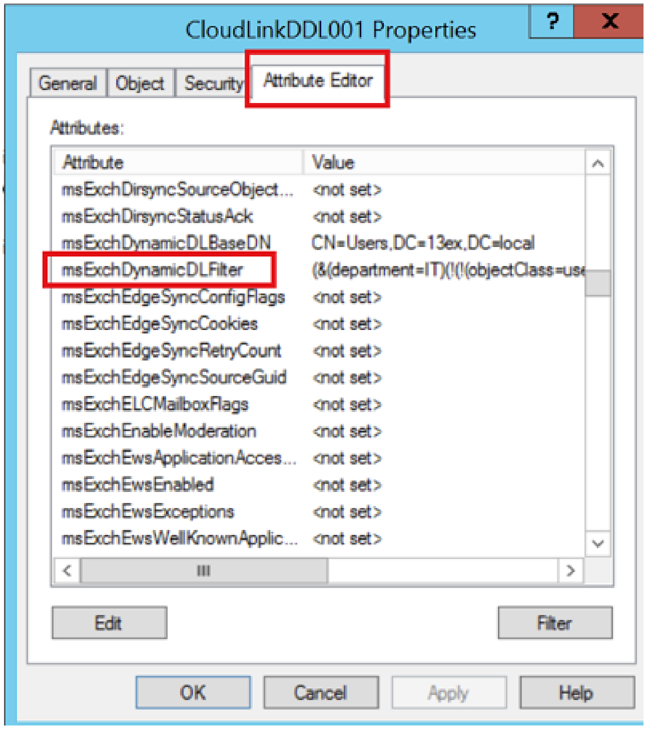
1 Log in to a domain controller. From the **Start** menu, select **Server Manager**. From the **Tools** menu of Server Manager, click **Active Directory Users and Computers**.

2 In the left navigation pane, select **Users**. A list of dynamic distribution groups appears as shown in the sample image below.

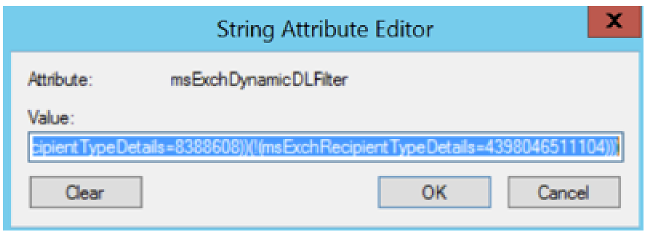


3 Double-click on the dynamic distribution group for which you want run sync. The property window appears.

4 From property window, select **Attribute Editor** tab. Within the attributes list, search for *msExchDynamicDLFilter* attribute.



5 Double click on the *msExchDynamicDLFilter* attribute to view corresponding attribute value.



6 Copy this attribute value and paste in the **Query String** field in the CloudLink tool.

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 Management Console, if CloudLink tasks are to perform the following actions:

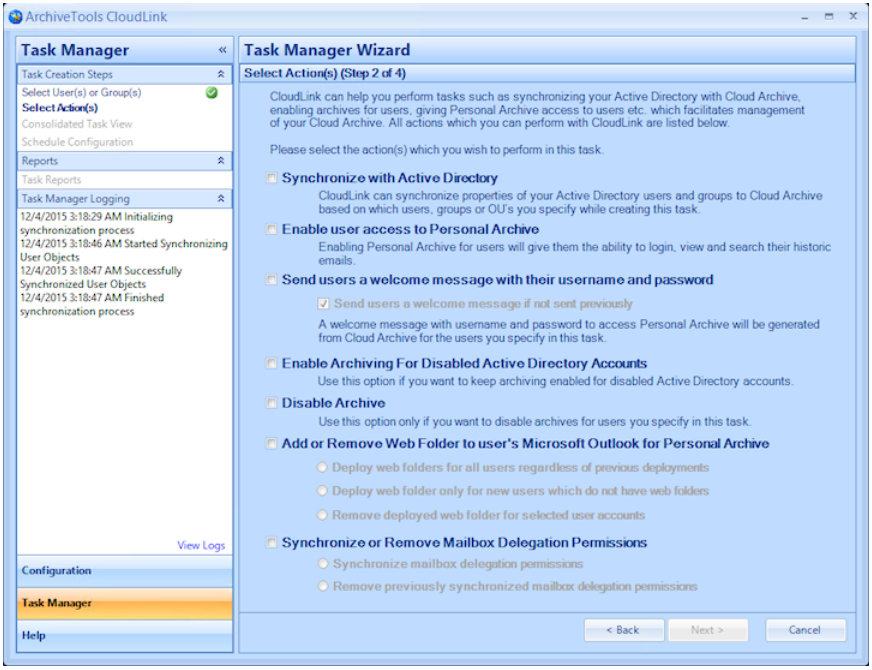
- Enable user access to Insight Personal Archive archives.
- Create welcome email messages for users with Insight Personal Archive archives.

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 Management 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 Management Console to select the **Manage account provisioning remotely** > **Using on-premise CloudLink tool** option.
- If you select **No**, CloudLink makes no changes in the Management Console. The actions to enable Insight Personal Archive archives and create welcome messages are not selectable in the Task Manager Wizard's **Select Action(s)** page.

Selecting the actions for a task to perform in an Exchange environment

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 Management Console.

See "About granting remote account management for CloudLink" on page 80.

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 Arctera Insight Archiving.
Enable user access to Personal Archive	Enables the user to access Arctera Insight Personal Archive.
Send users a welcome message with their username and password	Resets the password for the user's Insight Personal Archive 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 Active Directory synchronization options" on page 50. For example, if the **For user accounts disabled in Active Directory** option is set to **Disable Arctera Insight Archiving Archiving and Login**, then regardless of the Active Directory account status the task disables archiving and login to Insight Personal Archive.
Add or Remove Web Folder to user's Microsoft Outlook for Personal Archive	Deploys or removes an Arctera Insight Personal Archive web folder in the user mailboxes. Select the required sub-option.
Synchronize or Remove Mailbox Delegation Permissions	Synchronizes mailbox delegation permissions, or removes any previously synchronized mailbox delegation permissions for the targeted users or groups. Select the required sub-option. See "Introduction to Exchange mailbox delegation synchronization" on page 17.

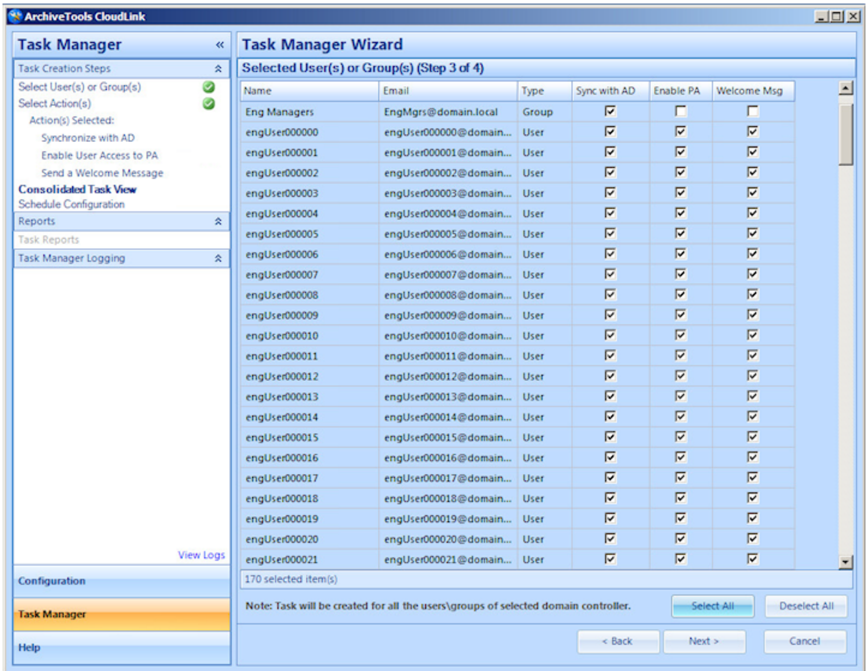
2 Click **Next** to save the task selections and continue to the next wizard step.

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.

Configuring the web folder properties for a task

The **Web Folder Properties** step of the CloudLink Task Manager Wizard is displayed if you selected the **Web Folder Management Configuration** task on the **Select Configuration Task(s)** page.

In the **Web Folder Properties** step you must specify the details for the Insight Personal Archive web folder that CloudLink adds to user mailboxes.

To configure web folder properties for a task

1 On the **Web Folder Properties** wizard page, do one of the following:

- To use the default settings that you configured in the **Web Folder Properties** step of the CloudLink configuration process, select **Use Default Web Folder Property Setting**. Then go to step 7.
- To use settings that differ from those you configured in the **Web Folder Properties** step of the CloudLink Configuration process, clear **Use Default Web Folder Property Setting**. Continue from step 2.

2 In the **Name** box, enter a folder name for the Insight Personal Archive web folder.

3 In the **Region** drop-down list, select your Arctera Insight Archiving geographical region.

If you do not know the region to which you are assigned, contact Arctera Services & Support.

Note: The region names have changed at version 4.0.3.

See “Should I upgrade to CloudLink 4.1.x?” on page 12.

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4 The **URL** box displays a URL based on the selected region. If you use Active Directory Federated Services (ADFS) for single sign-on to Insight Personal Archive, update the URL to specify the appropriate application login URL.

5 In the **Folder Path** box, select one of the following locations for the web folder:

- **Mailbox**, for a top-level folder
- **Inbox**, for a subfolder within the user's Inbox.

6 To have the web folder located as a subfolder in a specified location, select the **As a Sub Folder of** check box, and type the parent folder name in the text box.

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

Naming and scheduling a task

The **Schedule Configuration** step of the CloudLink Task Manager Wizard lets you determine when and how often a task runs.

You can configure a CloudLink task to run at any of the following times:

- Immediately
- Later, either once or recurrently

- Immediately and also later, either once or recurrently

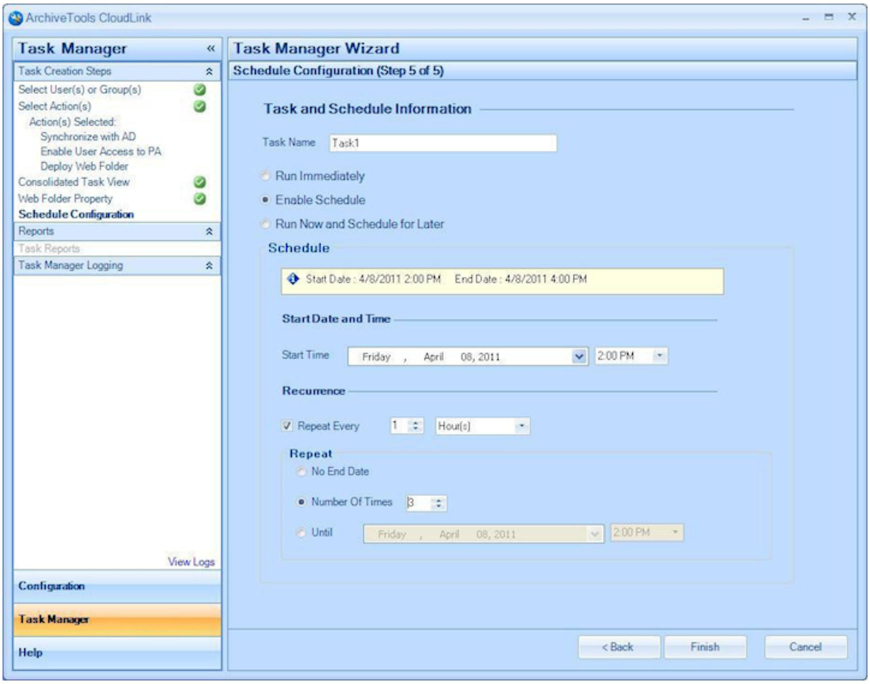
To name and schedule a task

1. On the **Schedule Configuration** wizard page, in the **Task Name** box, enter a name for the task.
2. Select one of the following options:
   - To run the task immediately, and once only, select **Run Immediately**, and go to step 5.
   - To run the task later, either once or recurrently, select **Enable Schedule**.
   - To run the task immediately and also later, either once or recurrently, select **Run Now and Schedule for Later**
3. In the **Start Time** boxes select the future date and time to run the task.
4. If you want a scheduled task to recur, do as follows:
   - Under **Recurrence**, select **Repeat Every** and then select the frequency with which to run the task.

     Note: A high frequency such as hourly may place a heavy demand on your network bandwidth.

   - Then under **Repeat**, specify one the following:

No End Date	The task continues to recur with no end date.
Number of Times	The task runs for the number of times that you select.
Until	The task recurs until the date and time you select.



5 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 114.

Chapter 9

Setting up CloudLink with Domino

This chapter includes the following topics:

About setting up CloudLink with Domino

Table 9-1 lists the steps that are required to set up CloudLink for use in a Microsoft Exchange environment.

Table 9-1 Steps to set up CloudLink with IBM Domino

Action	Reference
Create a service account for CloudLink.	See "Creating a CloudLink service account for a Domino environment" on page 88.

Table 9-1 Steps to set up CloudLink with IBM Domino *(continued)*

Action	Reference
Create a Notes account for CloudLink and set up Notes on the CloudLink server.	See "Creating a Notes account for CloudLink and setting up Notes on the CloudLink server" on page 88.
Confirm that the Domino Global Domain document is configured.	See "About configuring the Domino Global Domain Document" on page 89.
Run the CloudLink configuration wizard.	See "Configuring CloudLink for Domino" on page 90.

Creating a CloudLink service account for a Domino environment

CloudLink requires a Windows service account for the ArchiveTools CloudLink Server service to run under.

To create a CloudLink service account for a Domino environment

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 installed.

Creating a Notes account for CloudLink and setting up Notes on the CloudLink server

CloudLink accesses Domino Directory and Domino views using the Notes API. To make the connection, CloudLink requires a Notes user ID that has the required administrative rights. You can use the Domino Administrator ID if you want, but we recommend that you create a Notes account for CloudLink to use, with only the required permissions.

The server on which CloudLink is installed must run Lotus Notes client 8.5.3 or IBM Notes client 9.0.

Note: During the configuration and operation of CloudLink, the CloudLink Notes client must remain closed, because CloudLink uses the Notes API.

To create a Notes account for CloudLink

- Create a Notes user within the Domino Directory that has a valid ID file and Reader access to the Directory. There is no requirement for this user to have a mail file.

To set up Notes on the CloudLink server

1. Log on to the CloudLink server with the CloudLink service account.
2. Install Lotus Notes client 8.5.3 or IBM Notes client 9.0 in single-user mode, using the default directories.
3. Configure Notes using the ID file that you have created for CloudLink. Ensure that the ID file is stored within the default data directory.

About configuring the Domino Global Domain Document

CloudLink constructs Internet addresses automatically for Domino users who have missing or incomplete addresses. This functionality is based on the Global Domain Document. Internet addresses are not configured properly if the Global Domain Document is not properly configured. For instructions on how to configure the Global Domain Document, see the *Domino Mail* section of the *Arctera Insight Archiving Journaling Guide*.

See http://help.veritas.com/Welcome?context=EVCA1.0&locale=EN_US

Starting and closing the CloudLink application

You can start and close the CloudLink application as follows.

Note: 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.

Configuring CloudLink for Domino

You must configure CloudLink to work with Arctera Insight Archiving and with your Domino environment. Table 9-2 lists the configuration steps.

Table 9-2 CloudLink configuration steps for IBM Domino

Configuration step	Action	Reference
Select Configuration Task(s)	Select the tasks that you want to CloudLink 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 a Domino environment" on page 91.
Specify CloudLink Service Account	Provide the credentials of the Windows service account for CloudLink to use.	See "Specifying the CloudLink service account" on page 94.
Specify Notes ID	Specify the password of the Notes ID file that CloudLink uses to access the Domino Directory and the Domino views.	See " Specifying the Notes ID password" on page 95.
Cloud Archive Credential	Specify the credentials for the Management Console login account that has the System Administrator role.	See "Specifying the Management Console account credentials" on page 95.

Table 9-2 CloudLink configuration steps for IBM Domino *(continued)*

Configuration step	Action	Reference
Configure Domino Properties to sync	Select the properties to synchronize from Domino Directory to Arctera Insight Archiving.	See "Configuring the Domino properties to synchronize" on page 96.
Additional Domino Sync Options	Determine what happens to Arctera Insight Archiving archive accounts if the account is removed from the Domino view.	See "Specifying the additional Domino synchronization options" on page 96.
Report Management	Configure the CloudLink log settings and report settings.	See " Configuring report management and logging" on page 97.
Welcome Message Template	Configure the template for Insight Personal Archive welcome email messages that CloudLink sends. Note: This step is shown only if you select the **Welcome Message Template** configuration task.	See "Configuring the welcome message template" on page 98.

Selecting the CloudLink configuration tasks for a Domino environment

To begin the configuration of CloudLink, or to review or update the configuration, you must select the tasks that you want to CloudLink to perform. CloudLink can then display the required configuration steps.

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

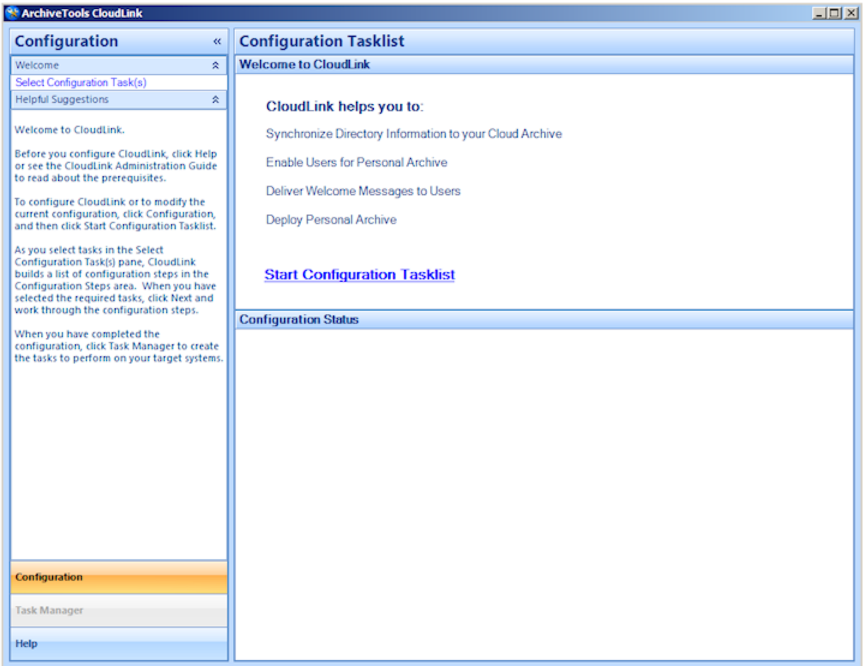
To select the CloudLink configuration tasks

1 Start CloudLink, if it is not already started.

See "Starting and closing the CloudLink application" on page 89.

2 Click the **Configuration** tab near the bottom of the **Configuration** 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:

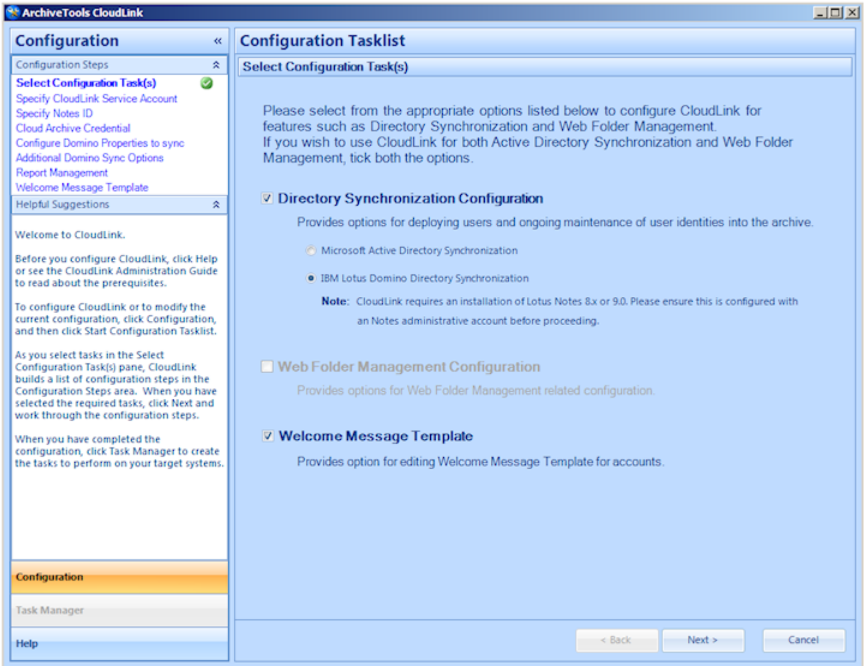
- Click **Select Configuration Task(s)** in the **Configuration** pane.
- Or click **Start Configuration Tasklist** in the **Configuration Tasklist** pane.

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

- For a Domino environment, select **Directory Synchronization Configuration**, and then select **IBM Lotus Domino Directory Synchronization**.

Note: When you select IBM Lotus Domino Directory Synchronization, the **Web Folder Management Configuration** option becomes unselectable. Web folder management is applicable only to a Microsoft Exchange environment.

- If you want CloudLink to be able to send email welcome messages to users who receive Arctera Insight Archiving archives, select **Welcome Message Template**.



As you select or deselect 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, if you want. However, some steps cannot be selected until earlier steps are successfully completed.
- CloudLink marks with a green check mark icon any steps that you have successfully completed.
- When you have finished the configuration you can return to a step to change its values if necessary.
- The **Helpful Suggestions** area of each configuration page displays tips on how to complete that step.

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 "Creating a CloudLink service account for a Domino environment" on page 88.

To specify the CloudLink service account

1. Go to the **Specify CloudLink Service Account** configuration step.
2. In the **Account** box, type the name of the CloudLink service account.

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

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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. Click **Validate** to validate the account.
6. Click **Next** to save the CloudLink service account values and continue to the next configuration step.

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

Specifying the Notes ID password

In the **Specify Notes ID** configuration step you must specify the password of the Notes ID file that CloudLink uses to access the Domino Directory and the Domino views.

See "Creating a Notes account for CloudLink and setting up Notes on the CloudLink server" on page 88.

To specify the Notes ID password

1. Go to the **Specify Notes ID** configuration step.
2. In the **Notes ID Password** box, enter the Notes ID password.
3. Click **Login**. CloudLink attempts to log in with the Notes ID to the Domino Directory on the Domino server.
4. If the login is successful, a dialog box indicates that the Notes ID file was successfully accessed. Click **Ok** on the dialog.

   Note: Information about your Domino environment, such as the number of directories is available in CloudLink when the login is successful.

5. Click **Next** to save the Notes ID password and continue to the next configuration step.

Specifying the Management Console account credentials

In the **Cloud Archive Credential** configuration step you must specify the credentials of the Management Console login account. The account must have the System Administrator administration role in the Management Console.

To specify the Management Console account credentials

1. Go to the **Cloud Archive Credential** configuration step.
2. In the **Username** box, type the name of the Management Console account.
3. In the **Password** box, type the password of the Management Console account.

4. In the **Region** drop-down list, select your Arctera Insight Archiving geographical region.

   If you do not know the region to which you are assigned, contact Arctera Services & Support.

   Note: The region names have changed at version 4.0.3.

   See "Should I upgrade to CloudLink 4.1.x?" on page 12.

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

Configuring the Domino properties to synchronize

In the **Configure Domino Properties to sync** configuration step you specify the properties that CloudLink synchronizes from your Domino Directory.

Note: The Domino Directory properties to synchronize are fixed for CloudLink at this release.

To configure the Domino properties to synchronize

1. Go to the **Configure Domino Properties to sync** configuration step.
2. Click **Next** to save the settings and continue to the next configuration step.

Specifying the additional Domino synchronization options

In the **Additional Domino Sync Options** configuration step you specify the actions that CloudLink takes for Domino archive accounts if the user is removed from the Domino view that is selected for the CloudLink task.

Note: For CloudLink to act upon the Domino view change, the same recurrent task must perform a synchronization both before and after the change. A task does not recognize the change to an account unless the task has its own record of the account before the change.

Non-recurrent tasks, including the tasks that you run immediately, never disable archives unless the action **Disable Archive** is selected in the Task Manager wizard.

The options are as follows:

Do nothing	CloudLink makes no changes to the Arctera Insight Personal Archive login, or to the Arctera Insight Archiving archiving settings for the user account.
Disable Arctera Insight Personal Archive Login	CloudLink disables the Arctera Insight Personal Archive login for the user account. New emails continue to be archived to the account. Archived emails remain accessible for eDiscovery.
Disable Arctera Insight Personal Archive Archiving and Login	CloudLink disables the Arctera Insight Personal Archive login for the user account. New emails are not archived to the account. Archived emails remain accessible for eDiscovery. CloudLink renames the account `username-Disabled_On_timestamp`

To specify the additional Domino synchronization options

1. Go to the **Additional Domino Sync Options** configuration step.
2. Select the action that you want CloudLink to take for users who become removed from the Domino view.

   Note: Do not use either of the **Disable Login** options if you intend to create CloudLink tasks with different Domino views as their targets. You may get issues if a user is removed from one view but continues to be present in another.

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

Configuring report management and logging

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

See "About the CloudLink log files" on page 119.

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 99.

Configuring the welcome message template

In the **Welcome Message Template** configuration step you configure the template for the Insight Personal Archive 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: Do not remove the **{username}** and **{password}** tags. CloudLink replaces these tags with the user name and the temporary password that give initial access to the archive.

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 pull-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 99.

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 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 Task(s)** 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.

Chapter 10

Creating CloudLink tasks for Domino

This chapter includes the following topics:

About creating CloudLink tasks for Domino

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 your user accounts.

You create tasks in the CloudLink Task Manager. You can configure a task to run immediately, or later, and on a recurring schedule if required.

Accessing Task Manager

CloudLink Task Manager is available if you have configured CloudLink.

To access Task Manager

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

See "Starting and closing the CloudLink application" on page 89.

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

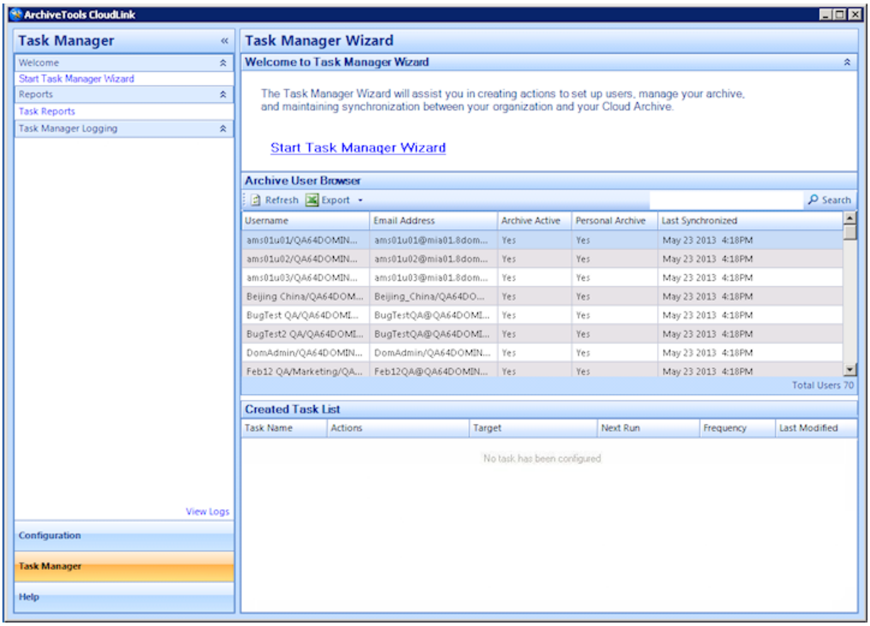
Note: The **Task Manager** tab is available only if you have completed some of the CloudLink configuration steps.

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

About the Task Manager Welcome page and Archive User Browser in a Domino environment

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

- The Domino users that you have selected for CloudLink to synchronize to Arctera Insight Archiving.
- CloudLink tasks that you have created.
- Summary report information about completed synchronizations.



The Archive User Browser

The **Archive User Browser** pane shows a list of the users that you have selected for CloudLink to synchronize from Domino Directory to Arctera Insight Archiving. When you start CloudLink, CloudLink reads its local database to provide this information. To refresh this data, click **Refresh** on the **Archive User Browser** menu bar.

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

Table 10-1 shows the information that the Archive User Browser displays for each user.

Table 10-1 Information shown in the Archive User Browser for Domino

Column	Description
Username	The login name of the user.
Email Address	The primary email address of the user.

Table 10-1 Information shown in the Archive User Browser for Domino *(continued)*

Column	Description
Archive Active	**Yes**: Archiving is set to enabled. **No**: Archiving is set to disabled.
Personal Archive	**Yes**: Access to Insight Personal Archive is set to enabled. **No**: Access to Insight Personal Archive is set to disabled.
Last Synchronized	The date and time of the last synchronization event. Note: The last synchronization time can be different for different users. You get only the modified account details from the last synchronization time to optimize the cloud archive status synchronization. See "Optimizing the cloud archive status synchronization" on page 121.

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

You can export the details of the users 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 121.

Created Task List

The **Created Task List** area lists all the tasks that currently exist. The list is empty until you create some tasks. You can manage your existing tasks from this list.

See "About managing tasks and monitoring their results" on page 113.

Task Manager Logging

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

See "Viewing the task reports" on page 118.

Creating CloudLink tasks for Domino

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

Table 10-2 lists the steps that are required to create a task for Domino. The Task Manager wizard takes you through the required steps.

Table 10-2 Creating a CloudLink task for Domino

Action	Reference
Select the Domino view on which to perform the task.	See "Selecting the Domino view on which to perform the task" on page 105.
Choose whether to disable archive access for users in Domino deny groups.	See "Choosing whether to disable Insight Personal Archive access for users in Domino deny groups" on page 107.
Allow remote account management by CloudLink, if required.	See "About granting remote account management for CloudLink" on page 108.
Select the actions for the task to perform.	See "Selecting the actions for a task to perform in a Domino environment" on page 109.
Schedule the task.	See "Scheduling a task" on page 110.
Review the task parameters and complete the task.	See "Reviewing the task parameters" on page 112.

Selecting the Domino view on which to perform the task

The **Select View** step of the Task Manager Wizard lets you select the Domino view that contains the users on which you want to perform the CloudLink task.

Note: The CloudLink task acts on all of the user accounts that are associated with the selected Domino view. To limit the users on which to perform a task you may want to create a suitable Domino view that contains only the required users, before you continue

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Note: For a Domino mailbox to synchronize to Arctera Insight Archiving, the person document Internet Address field must be populated with the user's primary SMTP address.

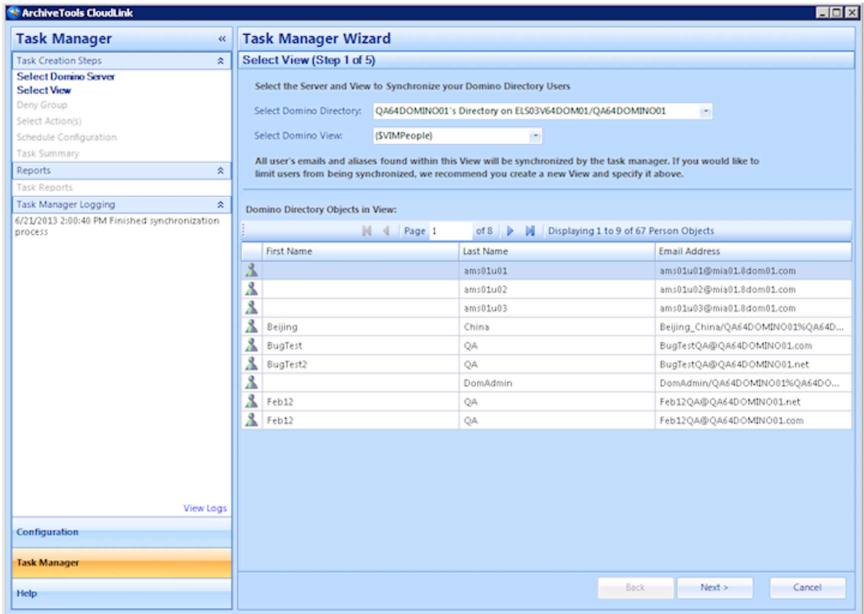
To select the Domino view on which to perform the task

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

2 On the **Select View** page, in the **Select Domino Directory** box, select the required Domino Directory from the drop-down list.

3 In the **Select Domino View** box, select the required Domino view from the drop-down list, which lists all the views for the selected Directory.

After a short delay, the Domino Directory Objects in View area loads a list of all the objects in the view that you selected.



4 Click **Next** to save your selections and continue.

Choosing whether to disable Insight Personal Archive access for users in Domino deny groups

The **Deny Group Functionality** step of the CloudLink Task Manager Wizard lets you choose whether to disable Arctera Insight Personal Archive access to the users in Domino deny groups. You can choose to disable access for specific deny groups, or for all deny groups, including any deny groups that are added in the future.

Note: The deny group functionality only disables access to Insight Personal Archive. The option does not remove the associated archive accounts.

To remove the archive accounts you must exclude them from the Domino View that synchronizes with Arctera Insight Archiving.

To enable Insight Personal Archive access for users in Domino deny groups

1. On the **Deny Group Functionality** wizard page, ensure that the **Deny Group Functionality** check box is not selected.
2. Click **Next** to save your chosen settings and continue to the next wizard step.

   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 108.

To disable Insight Personal Archive access for users in some or all Domino deny groups

1. On the **Deny Group Functionality** wizard page, select the **Deny Group Functionality** check box.
2. Do one of the following:
   - To disable access for users in all deny groups including groups that are created in the future, select **Use All**.
     The **Domino Server Deny Group Selections** area lists all the deny groups.

- To disable access for users in specific deny groups, select **Use Selected**, and then in the **Domino Server Deny Group Selections** area, select the required deny groups.

3 Click **Next** to save your chosen settings and continue to the next wizard step.

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 108.

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 Management Console, if CloudLink tasks are to perform the following actions:

- Enable user access to Insight Personal Archive archives
- Create welcome email messages for users with Insight Personal Archive 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 Management 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.

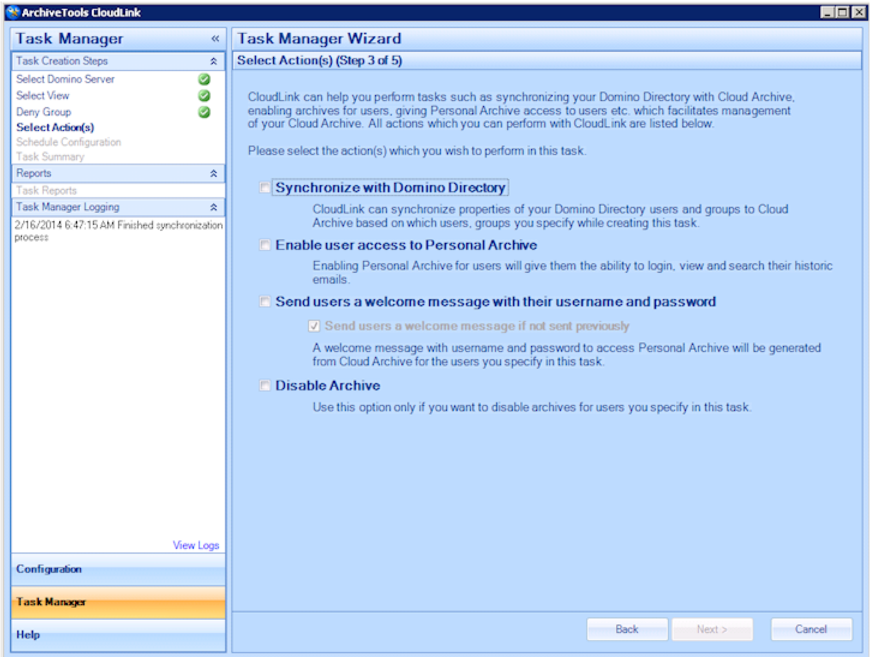
- If you select **Yes**, CloudLink edits the **User Management** page for the configured account in the Management Console to select the **Manage account provisioning remotely** > **Using on-premise CloudLink tool** option.
- If you select **No**, CloudLink makes no changes in the Management Console. The actions to enable Insight Personal Archive archives and create welcome messages are not selectable in the Task Manager Wizard's **Select Action(s)** page.

Selecting the actions for a task to perform in a Domino environment

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 Management Console.

See "About granting remote account management for CloudLink" on page 108.



To select the actions for the task to perform in a Domino environment

1. On the **Select Action(s)** wizard page, choose one or more actions for the task to perform on the users in the selected view.

   The following table lists all of the possible actions you can select from:

Synchronize with Domino Directory	Synchronize Domino Directory properties with Arctera Insight Archiving.
Enable user access to Personal Archive	Enable the user to access Arctera Insight Personal Archive.
Send users a welcome message with their username and password	Send a welcome email message to the user.
■ **Send users a welcome message if not sent previously**	The task sends a welcome message only if it has not sent one before. This option is selected by default to avoid resetting passwords and sending welcome messages to users with existing passwords. 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.
Disable Archive	Disable archiving.

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

Scheduling a task

The **Schedule Configuration** step of the CloudLink Task Manager Wizard lets you determine when and how often a task runs.

You can configure a CloudLink task to run at any of the following times:

- Immediately
- Later, either once or recurrently
- Immediately and also later, either once or recurrently

To schedule a task

1. On the **Schedule Configuration** wizard page, in the **Task Name** box, enter a name for the task.
2. Select one of the following options:
   - To run the task immediately, and once only, select **Run Immediately**, and go to step 5.
   - To run the task later, either once or recurrently, select **Enable Schedule**.

- To run the task immediately and also later, either once or recurrently, select **Run Now and Schedule for Later**.

3 In the **Start Time** boxes select the future date and time to run the task.

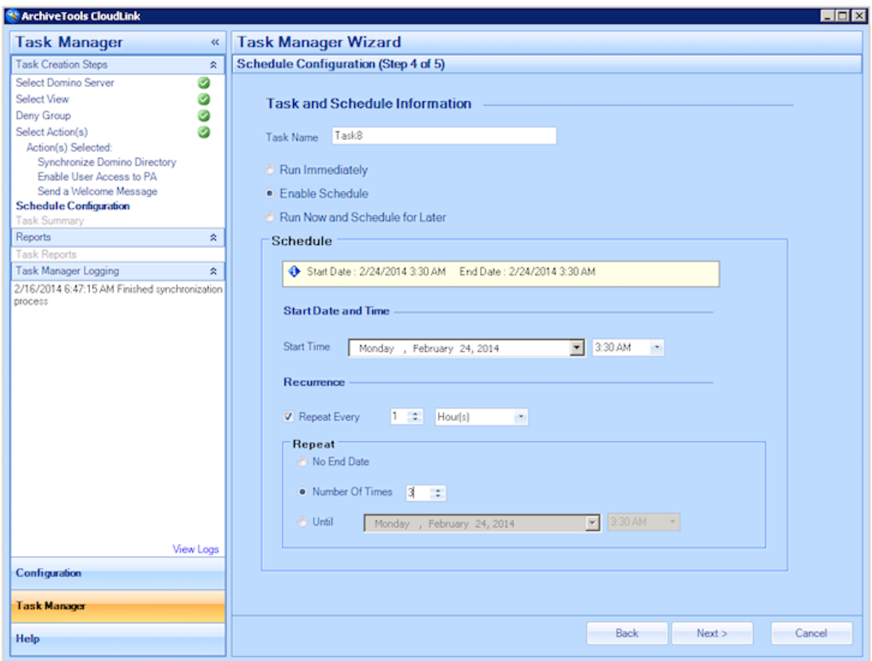
4 If you want a scheduled task to recur, do as follows:

- Under **Recurrence**, select **Repeat Every** and then select the frequency with which to run the task.

Note: A high frequency such as hourly may incur demands on your network bandwidth.

- Then under **Repeat**, specify one the following:

No End Date	The task continues to recur with no end date.
Number of Times	The task runs for the number of times that you select.
Until	The task recurs until the date and time you select.



5 Click **Next** to continue to the final wizard step.

Reviewing the task parameters

This **Task Summary** step of the CloudLink Task Manager Wizard displays a summary of the task that you have defined.

To review the task parameters

- On the **Task Summary** wizard page, check the description of the task and then do one of the following:
  - To make changes to the task, click **Back** and edit the configuration steps as required.
  - To create the defined task, click **Finish**.
    CloudLink returns to the **Welcome to Task Manager Wizard** page, and adds the task to the list of tasks in the **Created Task List** section.
    See "Viewing the Created Task List" on page 114.
  - To cancel the creation of the task, click **Cancel**.

Chapter 11

Monitoring and managing tasks and archive accounts

This chapter includes the following topics:

About managing tasks and monitoring their results

Table 11-1 lists ways in which you can manage tasks and monitor their progress and effects, and how you can obtain information on the status of accounts that Arctera Insight Archiving has synchronized.

Table 11-1 Managing tasks and monitoring their results

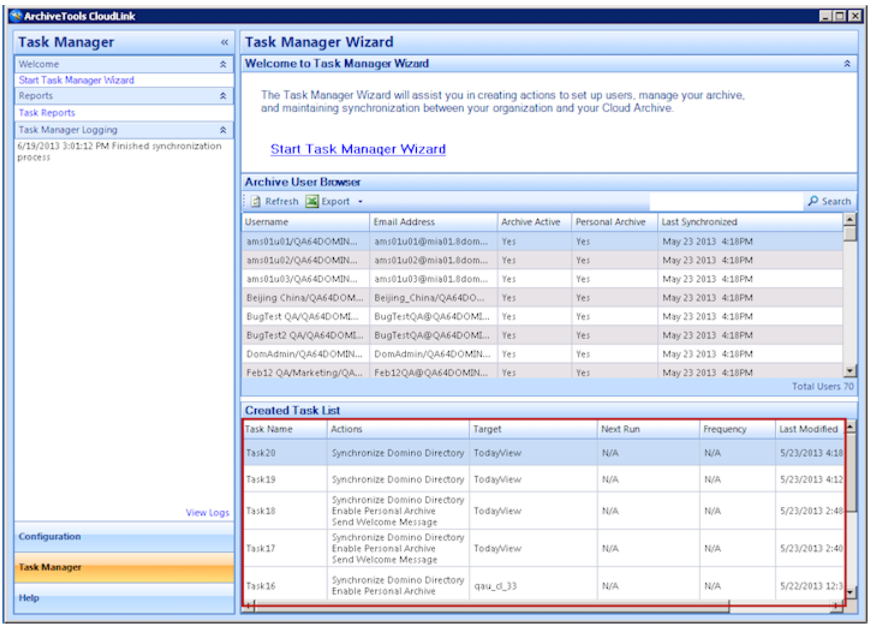
Action	Reference
View the Created Tasks list.	See "Viewing the Created Task List" on page 114.

Table 11-1 Managing tasks and monitoring their results *(continued)*

Action	Reference
Edit, copy, or delete existing tasks.	See “Editing, copying, and deleting tasks” on page 115.
Monitor the progress and effects of tasks by viewing the task reports.	See “Viewing the task reports” on page 118.
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 119.
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 121.

Viewing the Created Task List

CloudLink lists all the existing tasks including completed tasks in the **Created Task List** pane of the **Welcome to Task Manager Wizard** page.



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.

Editing, copying, and deleting tasks

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

- Edit the details of a task that is scheduled to run in the future.
  See "To edit a task that is scheduled to run in the future" on page 115.
- Copy a task to create a new task that is identical except for its name and schedule.
  See "To copy a task" on page 116.
- Create a new task by using the values of an existing task as a starting point in the Create Task wizard.
  See "To create a new task by using the values of an existing task as a starting point" on page 117.
- Delete a task from the task list. All future scheduled runs of the task are canceled.

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

  See "To delete a task" on page 118.

To edit a task that is scheduled to run in the future

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 that you want to edit, and then right-click.
3. Select **Edit Task**.

4 The **Edit Task Options** dialog box appears. Select **Edit existing task**, and then click **OK**.

5 The first page of the Task Manager Wizard appears. Work through the wizard to edit the details of the existing task.

See "Selecting the Active Directory users, groups, or OUs to perform a task" on page 67.

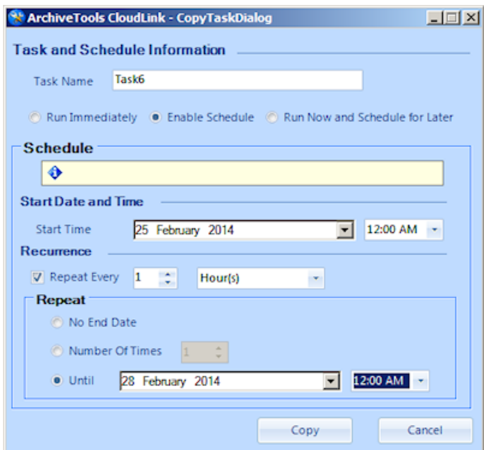
See "Selecting the Domino view on which to perform the task" on page 105.

To copy a task

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 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.

5 Choose when to run the task:

- To run the task immediately and once only, select **Run Immediately**. Then go to step 8.
- To run the task later, either once or recurrently, select **Enable Schedule**.
- To run the task immediately and also later, either once or recurrently, select **Run Now and Schedule for Later**.

6 If you chose to schedule the task, then under **Start Date and Time** select the future date and time to run the task.

7 If you want a scheduled task to recur, do as follows:

- Under **Recurrence**, select **Repeat Every** and then select the frequency with which to run the task.

  Note: A high frequency such as hourly may create a heavy demand on your network bandwidth.

- Then under **Repeat**, specify one the following:

No End Date	The task continues to recur with no end date.
Number of Times	The task runs for the number of times that you select.
Until	The task recurs until the date and time that you select.

8 Click **Copy** to create the new task, or click **Cancel** to cancel the copy.

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

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 existing task and then right-click.

3 Select **Edit Task**.

4 If the task is scheduled to run in the future, the **Edit Task Options** dialog box appears. Select **Edit and create new task**, and then click **OK**.

5 The first page of the Task Manager Wizard appears. Work through the wizard to edit the details for the new task.

See “Selecting the Active Directory users, groups, or OUs to perform a task” on page 67.

See “Selecting the Domino view on which to perform the task” on page 105.

To delete a task

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.

Viewing the task reports

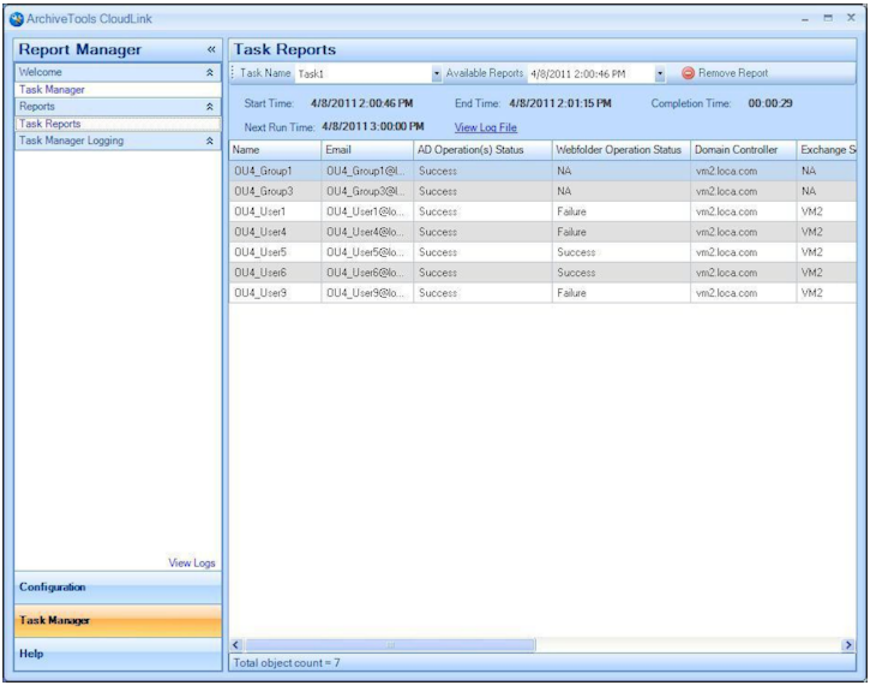
CloudLink generates a report every time a task runs. You can view the task reports to monitor the progress of tasks, including whether each action completed successfully for each user that was a target for the task.

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 119.
- 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 11-2 lists the details of the log files that CloudLink generates.

Table 11-2 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.
`ArchiveToolsJavaAdapter.log` (Domino only)	Lists the Domino Directory Servers, the number of views, and the number of users within each view.	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.

Optimizing the cloud archive status synchronization

To optimize the cloud archive status synchronization

1. Go to the folder in which CloudLink is installed, typically **C:\Program Files\ArchiveTools\CloudLink**.
2. 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.
3. Use a text editor such as Notepad to open **ArchiveTools.CloudLink.Server.exe.config**.
4. To enable this functionality, specify the **ArchiveStatusSyncUsingLastSyncTime** setting value as **True**.

   Note: By default, this property value is set to True.

5. To disable this functionality, specify the **ArchiveStatusSyncUsingLastSyncTime** setting value as **False**.
6. Restart the **ArchiveTools CloudLink Server** service for the change to take effect.

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.

- See "About the Task Manager Welcome page and the Archive User Browser in an Exchange environment" on page 63.
- See "About the Task Manager Welcome page and Archive User Browser in a Domino environment" on page 102.

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 Arctera Insight Personal Archive 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**.

Chapter 12

Known issues and limitations

This chapter includes the following topics:

About the known issues and limitations with CloudLink

The following sections describe known issues and limitations with CloudLink.

CloudLink Insight Personal Archive web folder deployment issues and limitations

The following issues and limitations relate to CloudLink deployment of Insight Personal Archive web folders:

- CloudLink fails when it deploys web folders to recently created user mailboxes, if the mailbox is not fully established.

  Before you use CloudLink to deploy web folders, log into the mailbox, either from Outlook or Outlook Web Access.
- CloudLink needs to run with elevated privileges if User Account Control (UAC) is enabled.

CloudLink needs to change the Windows service logon identity to the logon identity that is set in **Security Options**. CloudLink cannot perform this operation if UAC is enabled. To avoid changing the identity manually, run CloudLink as an administrator. To run CloudLink as an administrator hold down Shift while right-clicking the application and select **Run as administrator** from the shortcut menu.

- If CloudLink is installed on a domain controller, the **Security Options** dialog cannot set the new user credentials for the ArchiveTools CloudLink Server service. CloudLink continues to use the old credentials as the logon identity. CloudLink indicates that security permissions are insufficient and that the logon identity change for the service needs to be done manually. As a work-around, use the Services MMC snap-in to set the user identity for the ArchiveTools CloudLink Server service to the CloudLink service account.

CloudLink Active Directory synchronization limitations

The following limitations relate to CloudLink Active Directory synchronization:

- Aliases are only synchronized for individual accounts.
  Aliases within dynamic groups or security groups are not synchronized.
- User accounts and groups without email addresses are not synchronized.
  CloudLink uses email addresses to synchronize with Arctera Insight Archiving.
- Synchronization of groups to Arctera Insight Archiving does not synchronize individual user properties such as SMTP alias.
  Use OUs or individual users instead of distribution groups for synchronization.
- At this time, Arctera Insight Archiving does not offer the ability to leverage off Active Directory group attributes.

General CloudLink limitations

- Interrupting or canceling an upgrade of CloudLink may leave the CloudLink database in an inconsistent state. Allow upgrades to complete to ensure that your CloudLink database maintains a consistent state.