

Symantec Discovery Accelerator™

Installation Guide

11.0



Symantec Discovery Accelerator: Installation Guide

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- Information about upgrade assurance and support contracts
- Information about the Symantec Buying Programs
- Advice about Symantec's technical support options
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Europe, Middle-East, and Africa semea@symantec.com

North America and Latin America supportsolutions@symantec.com

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Introducing Discovery Accelerator

This chapter includes the following topics:

- [Key features of Discovery Accelerator](#)
- [About the Discovery Accelerator components](#)
- [Product documentation](#)

Key features of Discovery Accelerator

Discovery Accelerator is an electronic discovery and review system that integrates with Enterprise Vault services and archives. Discovery Accelerator lets authorized users search for, retrieve and preserve, analyze, review, mark, and export or produce emails, documents, and other electronic items for lead counsel examination or court-ready production—rapidly and in a cost-effective manner.

Using attorneys and external counsel to review large numbers of items is costly. With Discovery Accelerator, you can create a hierarchy of reviewers for a discovery action or case, with different levels of reviewers able to assign certain review marks. In this way, paralegal staff and non-legal staff can perform an initial review of search and collection results and leave only the privileged, relevant, or questionable items for counsel. Optionally, you can then produce the relevant items with an appropriate *Bates* number or else simply export them from Discovery Accelerator in various formats.

About the Discovery Accelerator components

[Table 1-1](#) lists the primary Discovery Accelerator components.

Table 1-1 The Discovery Accelerator components

Component	Notes
Discovery Accelerator client	The client is used by Discovery Accelerator administrators to set up and manage the system and by reviewers to access the items that they are to mark.
Accelerator Manager website	This website lets you set up multiple Discovery Accelerator databases in which to store your data.
Enterprise Vault Accelerator Manager service	This service handles the requests from the Discovery Accelerator client and works with the Enterprise Vault components to access archives, perform searches, and so on.
Customer database	The customer database is a SQL database in which Discovery Accelerator stores details of cases, user roles, search results, review marks and tags, and more. You can set up multiple customer databases.
Configuration database	The configuration database is a SQL database that specifies the location of the customer databases and stores details of the SQL Server, database files, and log files to use.
Custodian Manager website (optional)	This website lets you store the details of the <i>custodians</i> (individual employees) and custodian groups for which you want to search with Discovery Accelerator. A custodian group is any collection of employees, such as Windows or Domino groups and distribution lists, Active Directory or Domino LDAP searches, and Active Directory containers.
Discovery Accelerator API website (optional)	This website lets you use the Discovery Accelerator API to integrate third-party tools with the software, and thereby retrieve data from or export it to a Discovery Accelerator customer database. For more information on the Discovery Accelerator API, contact Symantec Support.

Product documentation

[Table 1-2](#) lists the documentation that is available for Discovery Accelerator.

Table 1-2 The Discovery Accelerator documentation set

Document	Comments
Installation Guide	Outlines how to perform a first-time installation of the Discovery Accelerator server and client software.
Upgrade Instructions	Explains how to upgrade an existing installation of Discovery Accelerator to version 11.0.
Administrator's Guide	Provides information for Discovery Accelerator administrators on how to set up and assign roles, search for items to include in the review set, export items for offline review, create reports, and more.
Reviewer's Guide	Describes the features of the Discovery Accelerator client that are available to reviewers.
Online Help	Accompanies all the Discovery Accelerator applications and provides extensive information on how to use their facilities.
Release Notes	Provides late-breaking information that you may need to be aware of before you install and use Discovery Accelerator.
Best Practices Guide	Provides extensive information on how best to plan for and implement Discovery Accelerator. To obtain this guide, go to the following page of the Symantec Support website: http://www.symantec.com/docs/TECH159520

White papers on the Symantec Support website

For more information on the deduplication features in Discovery Accelerator, see the *Accelerator Deduplication* white paper. This is available from the following page of the Symantec Support website:

<http://www.symantec.com/docs/DOC3621>

For extensive information on how to conduct searches with Discovery Accelerator, see the *Effective Searching* white paper. This is available from the following page of the Symantec Support website:

<http://www.symantec.com/docs/HOWTO77131>

The *Effective Reviewing* white paper provides comprehensive information on the features and tools that are available to Discovery Accelerator reviewers. This is available from the following page of the Symantec Support website:

<http://www.symantec.com/docs/DOC4751>

"How To" articles on the Symantec Support website

Most of the information in the Discovery Accelerator manuals is also available online as "How To" articles on the Symantec Support website. You can access these articles by searching the Internet with any popular search engine, such as Google, or by following the procedure below.

To access the "How To" articles on the Symantec Support website

- 1 Type the following in the address bar of your web browser, and then press **Enter**:
http://www.symantec.com/business/support/all_products.jsp
- 2 In the **Supported Products A-Z** page, choose **Enterprise Vault Discovery Accelerator**.
- 3 In the **Product Support** box at the right, click **How To**.
- 4 Search for a word or phrase by using the Knowledge Base Search feature, or browse the list of most popular subjects.

Discovery Accelerator training modules

The Enterprise Vault Tech Center (http://go.symantec.com/education_evtc) provides free, publicly available training modules for Discovery Accelerator. Modules are added regularly and currently include the following:

- Discovery Accelerator demo
- Changes to Accelerator searches in Enterprise Vault 10
- Changes to Custodian Manager in Enterprise Vault 10

More advanced instructor-led training, virtual training, and on-demand classes are also available. For information about them, see http://go.symantec.com/education_enterprisevault.

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Let us know what you like and dislike about the documentation. Were you able to find the information you needed quickly? Was the information clearly presented? Report errors and omissions, or tell us what you would find useful in future versions of our guides and online help.

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- Your name.

Email your comment to evdocs@symantec.com. Please only use this address to comment on product documentation.

We appreciate your feedback.

Preparing to install Discovery Accelerator

This chapter includes the following topics:

- [Configuration options for Discovery Accelerator](#)
- [Supported versions of Enterprise Vault in Discovery Accelerator environments](#)
- [Prerequisites for Discovery Accelerator](#)
- [Configuring Outlook to enable the processing of items with many attachments or many recipients](#)
- [Setting the Windows and ASP.NET Temp folder permissions](#)
- [Security requirements for temporary folders](#)
- [Disabling networking facilities that can disrupt a Discovery Accelerator environment](#)
- [Disabling the Windows Search Service on the Discovery Accelerator server](#)
- [Configuring the SQL Server Agent service](#)
- [Assigning SQL Server roles to the Vault Service account](#)
- [Verifying that Enterprise Vault expands distribution lists](#)

Configuration options for Discovery Accelerator

Discovery Accelerator is a client/server application. The client software runs on a Windows workstation, and the server software runs on a Windows server. For optimum performance, we strongly recommend that you install the server software

on a dedicated computer rather than your normal Enterprise Vault server. A SQL Server computer stores all the configuration and customer information.

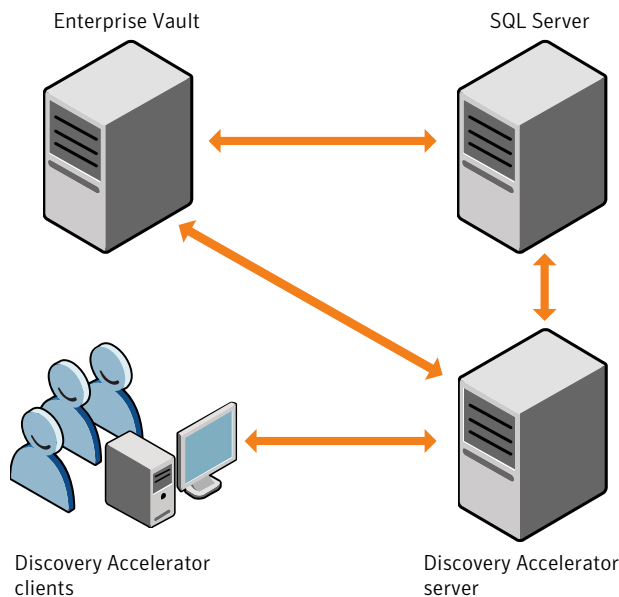
You can choose from several configuration options. If your planned configuration is different and you are unsure of what to configure on the Discovery Accelerator computer, contact Symantec for advice.

Discovery Accelerator configuration for large installations

A self-contained installation of Discovery Accelerator with a separate SQL Server computer minimizes the effect that intensive Discovery Accelerator searches and export runs have on the Enterprise Vault installation. This configuration is likely to suit larger installations.

The Discovery Accelerator computer must be in the same domain as the Enterprise Vault server or in a trusted domain.

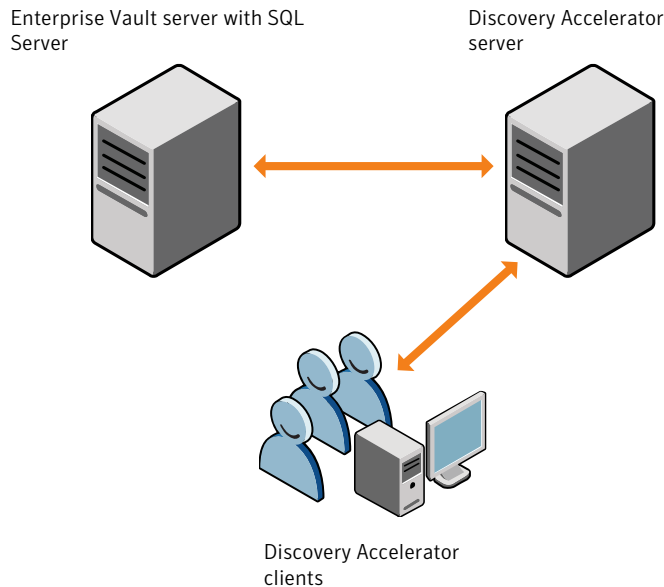
Figure 2-1 Configuration for large installations



Discovery Accelerator configuration for smaller installations

The only difference between the configuration for smaller installations and the configuration for large installations is that, in smaller installations, Enterprise Vault and SQL Server are on the same computer.

Figure 2-2 Configuration for smaller installations



For test purposes, you can run Discovery Accelerator, SQL Server, and Enterprise Vault on the same computer.

Supported versions of Enterprise Vault in Discovery Accelerator environments

Note the following important points about the version of Enterprise Vault that you install in a Discovery Accelerator environment:

- All Enterprise Vault servers in all Enterprise Vault sites in a Discovery Accelerator environment must run the same version of Enterprise Vault.
For example, when using Discovery Accelerator with two Enterprise Vault installations, you cannot have one site that runs Enterprise Vault 10.0.1 and another that runs Enterprise Vault 11.0.
- The major version of Discovery Accelerator must be the same as, or one later than, the major version of Enterprise Vault.
For example, you can run Discovery Accelerator 11.0.1 with Enterprise Vault 10.0.1 servers, but you cannot run Discovery Accelerator 10.0.1 with Enterprise Vault 11.0.1 servers.

- If the major version of Discovery Accelerator is the same as the major version of Enterprise Vault, the minor version (Service Pack) of Discovery Accelerator must be the same as, or later than, the minor version of Enterprise Vault. For example, you can run Discovery Accelerator 11.0.1 with Enterprise Vault 11.0.0 servers, but you cannot run Discovery Accelerator 11.0.0 with Enterprise Vault 11.0.1 servers.
- When upgrading both Discovery Accelerator and Enterprise Vault, you must first upgrade Discovery Accelerator, then Enterprise Vault on the Discovery Accelerator server, and finally Enterprise Vault on the Enterprise Vault server.

See the [Compatibility Charts](#) for more information on supported versions of Enterprise Vault.

Prerequisites for Discovery Accelerator

The computers on which you install SQL Server, the Discovery Accelerator server software, and the Discovery Accelerator client software each have different requirements. The following sections describe these requirements.

For the latest information on supported devices and versions of software, see the Enterprise Vault *Compatibility Charts* (<http://www.symantec.com/docs/TECH38537>).

Prerequisites for the SQL Server computer

The SQL Server computer must be running one of the following versions:

- SQL Server 2008 R2 x64 Edition, original release or later
- SQL Server 2012 x64 Edition, original release or later

Prerequisites for the Discovery Accelerator server computer

[Table 2-1](#) lists the software items that you must install and configure on the computer that is to run the Discovery Accelerator server software.

Table 2-1 Required software for Discovery Accelerator server installation

Item	Notes
Windows	<p>You require one of the following:</p> <ul style="list-style-type: none"> ■ Windows Server 2008 R2 x64 Edition, original release or SP1. ■ Windows Server 2012, Standard Edition or DataCenter Edition. <p>We recommend that you disable the Windows Search Service to stop it from interfering with the progress of Discovery Accelerator export runs.</p> <p>See “Disabling the Windows Search Service on the Discovery Accelerator server” on page 24.</p>
Internet Information Services (IIS)	<p>You require IIS 7.5 or later with ASP.NET, IIS 6.0 Management Compatibility, and Windows Authentication.</p>
Internet Explorer	<p>You require Internet Explorer 7.0 through 11.0 to run the Accelerator Manager website and Custodian Manager website. (Versions 10.0 and 11.0 are supported in Compatibility View only.)</p> <p>For optimum results, do the following:</p> <ul style="list-style-type: none"> ■ Configure the privacy settings in Internet Explorer to allow cookies. ■ Turn off any pop-up blockers. ■ Ensure that the advanced option Play animations in webpages is selected. <p>In Internet Explorer, click Internet Options on the Tools menu. Then, on the Advanced tab, locate the required option in the Multimedia category.</p>
Outlook	<p>You require Outlook 2007 SP2 or SP3 so that client users can export Exchange Server items in PST format and download the original versions of the items.</p> <p>Add the AttachmentMax and RecipientMax values to the registry on the Discovery Accelerator server to avoid problems when processing items that have many attachments or many recipients.</p> <p>See “Configuring Outlook to enable the processing of items with many attachments or many recipients” on page 20.</p>

Table 2-1 Required software for Discovery Accelerator server installation
(continued)

Item	Notes
Enterprise Vault	<p>If Discovery Accelerator is installed on a separate computer from Enterprise Vault, you must install the Enterprise Vault software on the Discovery Accelerator computer.</p> <p>As a minimum, you require a 10.0.1 or later or 11.0 or later version of one of the following:</p> <ul style="list-style-type: none"> ■ Enterprise Vault Services ■ Enterprise Vault API Runtime <p>See “Supported versions of Enterprise Vault in Discovery Accelerator environments” on page 15.</p> <p>There is no need to configure Enterprise Vault after you have installed it on your Discovery Accelerator server computer; do not run the Enterprise Vault configuration wizard. In addition, if the Enterprise Vault Admin service is running on your Discovery Accelerator server computer, we recommend that you stop it and set its startup type to Disabled.</p> <p>To search on content with Discovery Accelerator, set indexing on the Enterprise Vault archives to full.</p>
Windows Installer	<p>You require Windows Installer 3.1 or later. The installation package for version 3.1 is in the Links To Related Software folder on the distribution media.</p>
.NET Framework	<p>You require .NET Framework 3.5 SP1.</p> <p>This is available as a separate download (see the Links To Related Software folder in the distribution media).</p> <p>We recommend that you do not configure the Discovery Accelerator server to download and install .NET Framework updates automatically from the Windows Update site. Contact Symantec Support before installing such updates.</p>
Notes client	<p>You require version 8.5.2 or later of the Notes client so that client users can export Domino items.</p> <p>Install the client in single-user mode, using the account under which the Accelerator Manager service runs.</p>
Visual C++ 2008 SP1 Redistributable Package (x86)	<p>Enterprise Vault installs a suitable version of this package. The installation files for the package are also in the Links To Related Software folder on the distribution media.</p>

For the best results, we recommend that you install the Discovery Accelerator server software on a computer that has the following:

- 64-bit architecture.
- At least 4 GB of memory.
- Sufficient hard drive space to accommodate the searches and export runs that you expect to undertake.

All transaction requests from Discovery Accelerator clients to the Enterprise Vault and Discovery Accelerator servers use the Temp folder of the Vault Service account for temporary storage. Therefore, you must ensure that this folder has sufficient free space to handle large Discovery Accelerator searches and export runs. On both the Discovery Accelerator and Enterprise Vault servers, the Vault Service account's Temp folder must be on a drive that has a minimum of 40 GB of free space. However, 80 GB of free space is preferable.

Exclude the Vault Service account's Temp folders from antivirus scanning.

- Multiple hard drives. For example, you might use drive C for the operating system, drive D for the CD or DVD drive, drive E for the Temp folder of the Vault Service account, and drive F for the export output folder. You might split the Windows paging file across drives E and F.

The *Best Practices Guide* provides extensive information on the Discovery Accelerator server's hardware requirements. You can obtain this guide from the Symantec Support website at <http://www.symantec.com/docs/TECH159520>.

Prerequisites for Discovery Accelerator client computers

Table 2-2 lists the software items that you must install and configure on the computers that are to run the Discovery Accelerator client software.

Table 2-2 Required software for Discovery Accelerator client installation

Items	Notes
Windows	<p>You require one of the following:</p> <ul style="list-style-type: none"> ■ Windows 7 original release or SP1. ■ Windows 8 or 8.1. For best results, run the client in Windows 7 compatibility mode.
.NET Framework	<p>You require .NET Framework 3.5 SP1.</p> <p>This is available as a separate download (see the Links To Related Software folder in the distribution media).</p>

Table 2-2 Required software for Discovery Accelerator client installation
(continued)

Items	Notes
Outlook	You require one of the following to view Exchange Server items in their original form rather than in an HTML representation of the items: <ul style="list-style-type: none"> ■ Outlook 2007. ■ Outlook 2010. ■ Outlook 2013.
Notes client	You require version 8.5.2 or later of the Notes client to view Domino items in their original form rather than in an HTML representation of the items. Install the client in single-user mode.
Visual C++ 2008 SP1 Redistributable Package (x86)	You require this package if you want to view Domino items in their original form rather than in an HTML representation of the items. The installation files for the package are in the Links To Related Software folder on the distribution media.

The recommended screen resolution for the Discovery Accelerator client is 1024x768 or higher. For the best results, ensure that your client computers have at least 2 GB of memory.

Configuring Outlook to enable the processing of items with many attachments or many recipients

You must install a supported version of Outlook on the Discovery Accelerator server so that client users can export Exchange Server items in PST format and download the original versions of the items.

See [“Prerequisites for the Discovery Accelerator server computer”](#) on page 16.

By default, Outlook does not allow any items that have more than 2048 attachments or 2048 recipients to be opened. To avoid problems when client users try to export or download any items that have a larger number of attachments or recipients, set the registry values AttachmentMax and RecipientMax on the Discovery Accelerator server.

To configure Outlook to enable the processing of items with many attachments or many recipients

- 1 On the Discovery Accelerator server, start the Registry Editor.
- 2 Do one of the following:

- If you do not use policies, locate and then click the following registry subkey:
`HKEY_CURRENT_USER\Software\Microsoft\Office\version\Outlook\Options\Mail`
- If you use policies, locate and then click the following registry subkey:
`HKEY_CURRENT_USER\Software\Policies\Microsoft\Office\version\Outlook\Options\Mail`

where *version* is 12.0 for Outlook 2007 or 14.0 for Outlook 2010.

- 3 On the **Edit** menu, point to **New**, and then click **DWORD Value**.
- 4 Type **AttachmentMax**, and then press Enter.
- 5 Right-click **AttachmentMax**, and then click **Modify**.
- 6 In the **Value data** box, type the required value, and then click **OK**.
 The recommended value is `ffffff` in hexadecimal.
- 7 Repeat steps 3 through 6 to add the RecipientMax registry entry.
- 8 Exit the Registry Editor.

Setting the Windows and ASP.NET Temp folder permissions

To enable users to access any of the Discovery Accelerator websites, such as the Accelerator Manager site, you must ensure that the Authenticated Users group has Full Control permissions in the following folders:

- The Windows Temp folder on the Discovery Accelerator server. This folder is typically `%windir%\Temp`.
- The ASP.NET Temp folder on the IIS computer. This folder is typically:
`%windir%\Microsoft.NET\Framework\version\Temporary ASP.NET Files`
 64-bit versions of Windows also have the following ASP.NET Temp folder:
`%windir%\Microsoft.NET\Framework64\version\Temporary ASP.NET Files`

To set the Temp folder permissions

- 1 In Windows Explorer, right-click the folder whose permissions you want to change, and then click **Properties**.
- 2 Click the **Security** tab.
- 3 Add **Authenticated Users** and give them **Full Control**.
- 4 Click **Advanced**.
- 5 In the **Advanced Security Settings** dialog box, do one of the following:

- If you run Windows Server 2008 R2, check **Include inheritable permissions from this object's parent**.
- If you run Windows Server 2012, click **Enable inheritance**.

Security requirements for temporary folders

Note: The following article on the Symantec Support website provides comprehensive information on the security requirements:

<http://www.symantec.com/docs/TECH224726>

On both Discovery Accelerator server and client computers, Discovery Accelerator makes occasional use of various folders for temporary storage. To protect against unauthorized access to these folders, which can contain sensitive data, Discovery Accelerator checks access to them on startup and periodically thereafter. If the security check fails on the Discovery Accelerator server, the Enterprise Vault Accelerator Manager service stops and an error event is recorded in the Symantec Enterprise Vault event log. If the security check fails on a Discovery Accelerator client computer, the user must choose to rerun the check or close the client.

On server computers, Discovery Accelerator checks the security of these folders:

- The temporary folder of the user who is running the Enterprise Vault Accelerator Manager service.
- The folder that you specify as the "ECM Temporary Storage Area" through the Reviewing configuration options in the Discovery Accelerator client. By default, this folder is the Windows %TEMP% folder.
- The folder that you specify as the "Temporary storage area" through the API configuration options in the Discovery Accelerator client. By default, this folder is also the Windows %TEMP% folder.

On client computers, Discovery Accelerator checks the security of the temporary folder that belongs to the user who is running the client.

In both cases, Discovery Accelerator considers the following to be authorized users:

- Members of the Built-in groups Administrators, Backup Operators, and System Operators
- The user to whom the temporary folder belongs
- The Local System account

Granting additional users and groups access to the temporary folders

On both Discovery Accelerator server and client computers, you can set registry entries to exempt selected users or groups from the security checks or turn the checks off altogether.

To use registry entries to configure the security checks

- 1 On the Discovery Accelerator server or client computer where you want to set the registry entries, open the Registry Editor.
- 2 Do one of the following:
 - On a server computer, browse to the following subkey:
HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\KVS
 - On a client computer, browse to the following subkey:
HKEY_CURRENT_USER\Software\KVS

If this subkey does not exist, you must create it. This is typically the case if you have performed a per-machine installation of the Discovery Accelerator client, rather than a per-user installation.
- 3 Set one of the following registry entries:

TempFolderExceptions String. Specifies the names of one or more users or groups to exempt from the security check. Enter the credentials in the form *domain\user_name*, or *BUILTIN\user_name* for built-in users, and separate them with semicolons. For example:

OurDomain\Marie.Lopez;BUILTIN\Server Operators

SkipTempFolderCheck DWORD. Specifies whether to perform the security check (0, the default) or turn it off (1).

- 4 If you set the registry entry on a server computer, restart the Enterprise Vault Accelerator Manager service. If you set it on a client computer, restart the client.

Disabling networking facilities that can disrupt a Discovery Accelerator environment

The Windows networking subsystem provides a number of facilities that can cause issues in a Discovery Accelerator environment. We recommend that you disable these facilities.

To disable networking facilities that can disrupt a Discovery Accelerator environment

- 1 Disable the following features on your designated Discovery Accelerator server, Enterprise Vault servers, and all SQL Servers that host an Enterprise Vault database:

- Receive-Side Scaling
- TCP Chimney
- TCP Segmentation Offloading
- TCP/IP Offload Engine

The following article on the Symantec Support website provides instructions on how to disable these features:

<http://www.symantec.com/docs/TECH63230>

- 2 Disable any network interface card (NIC) Teaming that may be present on the Enterprise Vault and Discovery Accelerator servers.

For guidelines on how to disable NIC Teaming, consult the documentation that your hardware vendor provides.

Disabling the Windows Search Service on the Discovery Accelerator server

If the Windows Search Service is running on the Discovery Accelerator server, it can sometimes prevent Discovery Accelerator from exporting items for offline review. We therefore recommend that you disable the service, as described in the following article on the Symantec Support website:

<http://www.symantec.com/docs/TECH203434>

You can disable the service altogether or you can partially disable it by excluding selected folders from indexing, such as the Windows Temp and Discovery Accelerator export folders.

Configuring the SQL Server Agent service

Discovery Accelerator provides the facility to create schedules with which you can conduct recurrent or future searches for items. As these schedules are SQL Server Agent jobs, you must ensure that the SQL Server Agent service is running on your SQL Server computer.

You must also ensure that the SQL Server Agent service is running if you want to use the analytics facilities in Discovery Accelerator to mark or tag items

automatically. For more information on these facilities, see the *Administrator's Guide*.

We recommend that you configure the SQL Server Agent service to start automatically when the SQL Server computer starts.

To configure the SQL Server Agent service to start automatically

- 1 On your SQL Server computer, double-click the **Administrative Tools** applet in Control Panel.
- 2 Double-click **Services**.
- 3 Right-click **SQL Server Agent**, and then click **Properties**.
- 4 Change the startup type to **Automatic**, and then click **OK**.

Assigning SQL Server roles to the Vault Service account

The Vault Service account is the account that Enterprise Vault services and tasks use when accessing Enterprise Vault databases. You must assign a number of SQL Server roles to this account to perform various activities with Discovery Accelerator. The two required roles are as follows:

- **dbcreator** (database creator). The facility to create configuration and customer databases with Discovery Accelerator is dependent on the Vault Service account having this role.
- **sysadmin** (system administrator). Discovery Accelerator provides the facility to create schedules with which you can conduct searches repeatedly or at some future time. These schedules are SQL Server Agent jobs and, by default, Discovery Accelerator assumes that you want to make a user with the sysadmin role the creator and owner of them.

In addition, you require the sysadmin role to enable Discovery Accelerator cases for analytics.

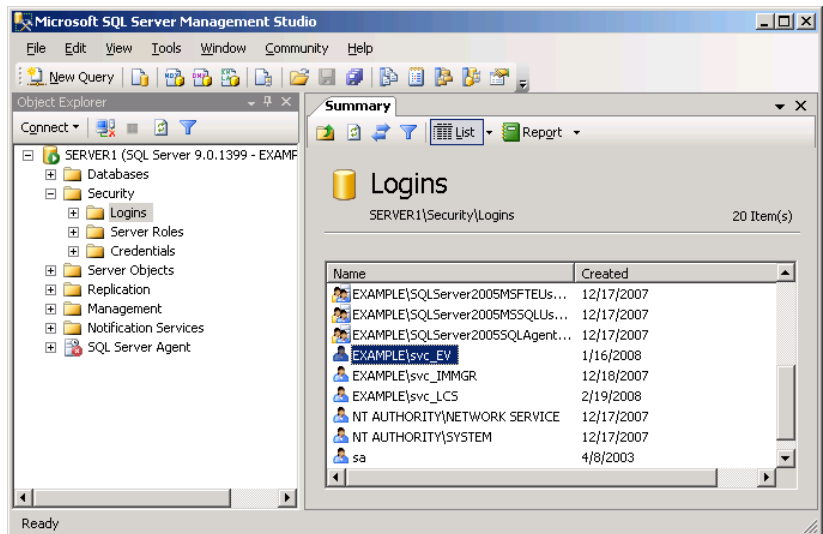
Note: The dbcreator and sysadmin roles are server-wide roles that may grant more security privileges to the Vault Service account than you are comfortable with. If this is the case, you can give the Vault Service account the minimum required permissions by following the instructions in this article on the Symantec Support website:

<http://www.symantec.com/docs/HOWTO80670>

Then, after you have installed the Discovery Accelerator client, you must change the value of the security configuration option "Use SQL Server SysAdmin Server Role for Schedules". For instructions on how to do this, see the *Administrator's Guide*.

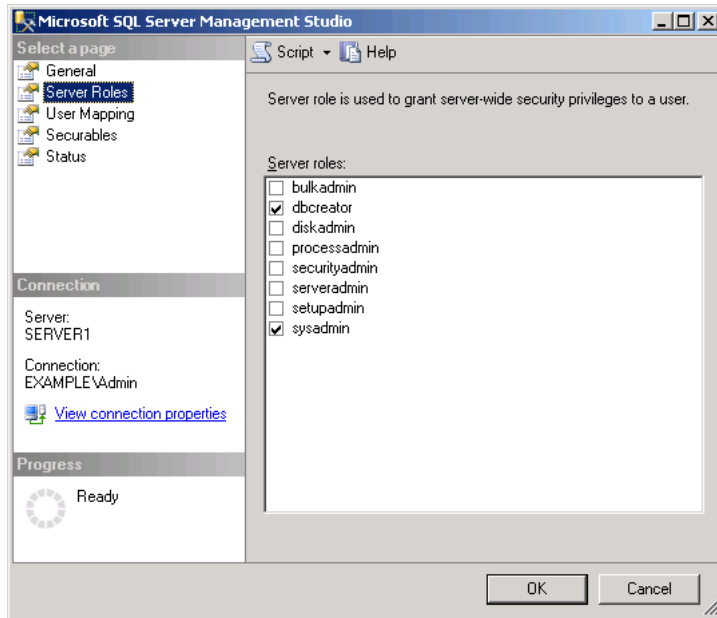
To assign SQL Server roles to the Vault Service account

- 1 On the SQL Server computer, start SQL Server Management Studio.
- 2 In the left pane of the SQL Server Management Studio window, expand the tree to display first the required SQL Server and then the **Security** folder.
- 3 Under the **Security** folder, double-click **Logins** to display the users in the right pane.



- 4 In the **Logins** list, right-click the Vault Service account, and then click **Properties**.
- 5 In the **Login Properties** dialog box, select the **Server Roles** page.

- 6 In the **Server roles** box, make sure that **dbcreator** and **sysadmin** are checked.



- 7 Click **OK**.

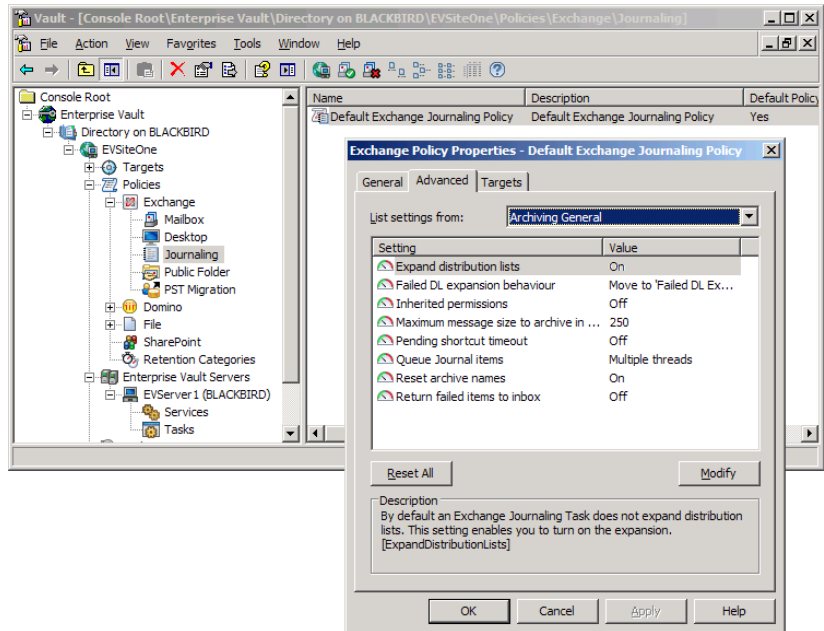
Verifying that Enterprise Vault expands distribution lists

In Microsoft Exchange environments, you must ensure that the Enterprise Vault Exchange Journaling Task expands distribution lists in the To, CC, and BCC fields of items.

To verify that Enterprise Vault expands distribution lists

- 1 Open the Enterprise Vault Administration Console.
- 2 Expand the contents of the left pane until the journaling policies are visible.

- 3 Right-click the required policy, and then click **Properties**. For example:



- 4 Click the **Advanced** tab, and then check the value for the **Expand distribution lists** setting.
- 5 If you need to change the value for the setting, do the following:
 - Click **Modify**.
 - Change the value to **On**.
 - Click **OK** in each dialog box to save the change that you have made.
 - Restart the Journaling task to put the change into effect.

Installing Discovery Accelerator

This chapter includes the following topics:

- [Installing the Discovery Accelerator server software](#)
- [Installing the Discovery Accelerator client software](#)

Installing the Discovery Accelerator server software

Follow the instructions in this section to perform a first-time installation of the Discovery Accelerator server software. If you want to upgrade an existing Discovery Accelerator installation, see the `DAUpgradeInstructions` file.

Before you proceed, note the following:

- Installing this software on a computer on which you have also installed the Compliance Accelerator server software is not supported.
- You can configure Discovery Accelerator for use in a Network Load Balancing cluster. However, installing the software on the nodes in other types of clusters is not supported.
See [“Installing Discovery Accelerator in a clustered environment”](#) on page 45.

To install the Discovery Accelerator server software

- 1 Load the release media, and then do one of the following:
 - When the Install Launcher starts, follow the links to install the Discovery Accelerator server software.
 - In Windows Explorer, browse to the `Symantec Enterprise Vault Discovery Accelerator\Server` folder, and then run `setup.exe`.

The `setup.exe` program launches the Windows Installer (`.msi`) package that is in the same folder with elevated privileges. This is necessary to enable the installation to complete all of its processes.

- 2 Follow the on-screen instructions, which prompt you to submit information at several points.

- Choose between the following setup types:

Typical	Installs all the components. This option is recommended for most users.
Custom	Lets you select the components to install. For example, you can choose to install the Enterprise Vault Accelerator Manager service but not the Custodian Manager website or Discovery Accelerator API website.

- If you are prompted for details of the account under which to run the Enterprise Vault Accelerator Manager service, enter the details of the Vault Service account with which you manage your Enterprise Vault server.
- 3 If you have chosen to install the Accelerator Manager service then, when the installation program has finished, check the option to display the Enterprise Vault Accelerator Manager website. Then you can create the configuration database and customer databases.

The installation program automatically opens the Accelerator Manager website with administrator privileges if you have installed Discovery Accelerator on a server in which User Account Control (UAC) is enabled. (This is a requirement when accessing the website in such environments.) If UAC is not enabled, a Run As dialog box may prompt you for the name and password of the user account under which to access the website. Enter the details of the Vault Service account with which you manage your Enterprise Vault server.

See [“Creating the configuration database and customer databases”](#) on page 31.

- 4 If you want to use the Legal Hold facility to stop users from deleting items from their archives, you must install a Discovery Accelerator license on each storage server in your Enterprise Vault site. To install the license, find the Enterprise Vault license key file on each server, and open it in a text editor. Then paste into the file the Discovery Accelerator license key with which you have been provided.

The following is a typical example of a key:

```
<key>  
<name>EVDA</name>
```

```
<version>1.0</version>  
<start_date>2014-12-31</start_date>  
<end_date>2016-06-31</end_date>  
<warn_policy>1,30</warn_policy>  
</key>
```

Contact Symantec Corporation to obtain your license key, if you do not already have it.

Allowing Enterprise Vault to communicate with Discovery Accelerator through the Windows firewall

You must configure the Windows firewall on the Discovery Accelerator server to permit Enterprise Vault to communicate with Discovery Accelerator through it. Certain interactions between the Enterprise Vault server and the Discovery Accelerator server require unrestricted communication. You can allow Enterprise Vault to communicate with Discovery Accelerator through the Windows firewall by adding the Accelerator service process to the exceptions list for the firewall.

You must be logged on to the computer as an administrator to complete this procedure.

To allow Enterprise Vault to communicate with Discovery Accelerator through the Windows firewall

- 1 In Control Panel, click **System and Security**, and then click **Windows Firewall**.
- 2 Click **Allow a program or feature through Windows Firewall**.
- 3 Click **Change settings**, and then click **Allow another program**.
- 4 Click **Browse**, and then browse to the Discovery Accelerator program folder (typically, C:\Program Files (x86)\Enterprise Vault Business Accelerator).
- 5 Click `AcceleratorService.exe`, and then click **Open**.
- 6 Click **Add**, and then click **OK**.

Creating the configuration database and customer databases

After you have installed the Discovery Accelerator server software, you must set up the required configuration and customer databases with the Accelerator Manager website.

The configuration database specifies the locations of the customer databases, and it stores details of the SQL Server, database files, and log files to use. Each customer

database stores details of cases, user roles, search results, review marks and tags, and more.

You can set up one configuration database only, but you can set up multiple customer databases. The configuration database can reside on one SQL Server, and the customer databases can reside on a different SQL Server. You may find it useful to set up multiple customer databases if, for example, you want to separate the groups who are to perform searches in Discovery Accelerator. Suppose that your legal department and human resources department both need to perform searches. These two departments may not be able to share roles in a Discovery Accelerator system. Setting up two customers lets both departments use Discovery Accelerator without needing access to the same Discovery Accelerator setup.

Before you proceed, note the following:

- If you have installed Discovery Accelerator on a server in which User Account Control (UAC) is enabled, you must open the Accelerator Manager website with administrator privileges.
- If Symantec Endpoint Protection is running on your Discovery Accelerator server, we recommend that you shut it down temporarily.
See [“Cannot create or upgrade Discovery Accelerator customer databases when Symantec Endpoint Protection is running”](#) on page 55.

To create the configuration database

- 1 If you have yet to display the Accelerator Manager website, start Internet Explorer and browse to the following location:

`http://server_name/EVBAAdmin`

where *server_name* is the name of the server on which you installed the Discovery Accelerator server software.

- 2 In the **Configuration Database Details** page, enter your preferred details, and then click **OK**.

SQL Server

Specifies the name or IP address of the SQL Server computer. You can specify the IP address in either IPv4 or IPv6 format. SQL instances are supported.

Database name	<p>Specifies the name of the configuration database. The name cannot contain any of the following characters:</p> <p><code>\/: * ? " < > ' </code></p> <p>Note: Compliance Accelerator and Discovery Accelerator cannot share the same configuration database. So, if you previously created the configuration database for one application, you must create a new database with a different name when setting up the other application.</p>
Use Existing Database	<p>Instructs Discovery Accelerator to use the specified existing database instead of creating a new one. If you choose this option, the remaining boxes in the page are unavailable.</p>
Data File Folder	<p>Specifies a location for the configuration database file. This location should be a valid, existing path on the SQL Server computer, and it must be a local path (not a network share path). For example, you might specify the path as <code>E:\SQLData</code>. A minimum of 300 MB is required for the default configuration database.</p>
Log File Folder	<p>Specifies a location for the database log files. This location should be a valid, existing path on the SQL Server computer, and it must be a local path (not a network share path). For example, you might specify the path as <code>F:\SQLLogs</code>. A minimum of 300 MB is required for the database log files.</p>
Initial Database Size	<p>Sets the initial size in megabytes of the configuration database file. In the Growth % box, you can specify as a percentage of the file size the amount of space that is automatically added to the file each time more is needed.</p>
Initial Log Size	<p>Sets the initial size in megabytes of the database log files. In the Growth % box, you can specify as a percentage of the file size the amount of space that is automatically added to a file each time more is needed.</p>

- 3 When Discovery Accelerator prompts you to do so, restart the Enterprise Vault Accelerator Manager service by using the Services snap-in to Microsoft Management Console.

Note: Restarting the service causes Discovery Accelerator to check the security of various temporary folders that the application uses. If this security check fails, an error event with an ID of 585 is recorded in the Symantec Enterprise Vault event log, and the service does not start.

See [“Security requirements for temporary folders”](#) on page 22.

- 4 In the Accelerator Manager website, click **Upload License** to import your license key file into Discovery Accelerator.

To create the customer databases

- 1 In the left pane of the Accelerator Manager website, right-click the server node, and then click **New Customer**.
- 2 Complete the details in the **Create Customer** page, and then click **OK**.

Customer Type	Specifies whether this database is a customer database for Discovery Accelerator or Custodian Manager.
Name	Specifies a unique name for the customer. The name cannot contain any of the following characters: <code> \ / : * ? " < > ' </code>
Directory DNS aliases	Specifies the DNS alias, server name, or IP address of the Enterprise Vault Directory service computer. You can specify IP addresses in either IPv4 or IPv6 format. If you want to specify multiple Directory service computers, type the details of each one on a line of its own. All the computers must be running exactly the same version of Enterprise Vault. Take care to specify the correct DNS alias information. If the information is wrong, no vault stores will be visible in any area of the Discovery Accelerator client.

Administrator User or Group Optionally nominates an Active Directory user account or group account as an administrator for the Discovery Accelerator customer database. This user or group has full administrative permissions in the customer database and typically assigns application-wide roles to other users. Specify the account details in the form *domain\user_or_group_name*; for example, "OurDomain\Marie.Lopez".

Note that the Vault Service account already has full administrative permissions in the customer database, so there is usually no need to nominate another user or group. However, you may want to do this if your company policy restricts the use of service accounts.

Enable Customer's tasks Enables users to perform activities in the Discovery Accelerator client. If you uncheck this option, only automatic tasks like scheduled searches are permissible.

IIS section

Virtual Directory Specifies the name of the IIS virtual directory for the Discovery API website. This site lets software developers integrate third-party tools with Discovery Accelerator, and thereby retrieve data from or export it to a Discovery Accelerator customer database.

No two customers can share the same virtual directory name. The directory name must not include space characters or any of the following characters:

* ? \ / % ' "

Note that you cannot name the virtual directory for any Discovery Accelerator customer as "EVBAAdmin" because this name is reserved for the Accelerator Manager website.

IIS Server Specifies the name or IP address of the IIS server that is to host the Discovery Accelerator site. You can type the IP address in either IPv4 or IPv6 format. However, you cannot type an IPv6 address that includes colons (:) or is enclosed in square brackets ([]).

The default entry for this field is the server on which you are running the Accelerator Manager website.

Manage Virtual Directory Lets you administer the virtual directory by using the Discovery Accelerator client. By default, the option is checked.

Database Details section

SQL Server Specifies the name or IP address of the SQL Server on which the customer database is to reside. You can specify the IP address in either IPv4 or IPv6 format. SQL instances are supported. The default entry for this field is the server on which you are running the Accelerator Manager website.

Database Specifies the name of the customer database. The name cannot contain any of the following characters:
 \ / : * ? " < > | '

Use Existing Database Instructs Discovery Accelerator to use the specified existing database instead of creating a new one. If you check this option, many of the remaining boxes in the page become unavailable. By default, the option is not checked.

Data File Folder Specifies a location for the customer database file. This location should be a valid, existing path on the SQL Server computer, and it must be a local path (not a network share path). For example, you might specify the path as E:\SQLData.

Log File Folder Specifies a location for the database log files. This location should be a valid, existing path on the SQL Server computer, and it must be a local path (not a network share path). For example, you might specify the path as F:\SQLLogs.

Initial Database Size Sets the initial size in megabytes of the customer database file. In the **Growth %** box, you can specify as a percentage of the file size the amount of space that is automatically added to the file each time more is needed.

Initial Log Size Sets the initial size in megabytes of the database log files. In the **Growth %** box, you can specify as a percentage of the file size the amount of space that is automatically added to a file each time more is needed.

Windows Authentication	Specifies whether to use a Microsoft Windows user account to connect to the customer database. If you uncheck this option, you must set the SQL logon name and password to use for the database connection.
Connection Time Out	Specifies the amount of time in seconds to wait for connections to the customer database to complete before terminating the attempt and generating an error.
Connection Life Time	Specifies the time in seconds that a connection to the customer database is considered valid. When the time has elapsed, the connection is disposed of.
Max Pool Size	Specifies the maximum number of database connections that can be simultaneously opened to the customer database.
DSN	Specifies the full connection string, or Data Source Name (DSN), to use when connecting to the customer database. The process of creating and connecting to the database automatically fills in this field. Do not modify the details unless Symantec Support advises you to do so.

Database Locations For Analytics section

This area of the page lists existing database locations for analytics data, and lets you add new database locations. You must specify at least one database location for analytics. If you do not intend to use the analytics feature with this customer, use the default database location.

See [“Configuring analytics database locations”](#) on page 37.

- 3 Wait for Discovery Accelerator to create the customer database. This process can take several minutes to complete.
- 4 Repeat steps 1 through 3 for each customer database that you want to create.

Configuring analytics database locations

When you enable a case for analytics, Discovery Accelerator must fetch all the case items from Enterprise Vault into the customer database, and index them. This requires a large amount of disk space. Discovery Accelerator lets you define locations to host the analytics table file groups and indexes. You can add more locations when you need more disk space.

The Customer page of the Accelerator Manager website lists existing analytics database locations, and lets you add more. Next to each location, check marks in

the **Table File Group** and **Full Text Indexes** columns show whether the location is used for table files, search indexes, or both.

When you plan and configure analytics database locations, consider the following:

- The volume of data. The collection and indexing of analytics data can generate very large databases and index files. As a rough guide, collecting one million items that are all 20 kilobytes in size can produce a database that is 40 gigabytes or more in size. However, this can vary from one environment to another. The *Best Practices Guide* for Discovery Accelerator provides extensive information on how to size your Discovery Accelerator databases appropriately. You can obtain this guide from the Symantec Support website at <http://www.symantec.com/docs/TECH159520>.
- Performance. Host each database location on a physically separate disk. If you have more than one analytics database location, Discovery Accelerator uses them in rotation to spread the data and the disk access requirements. Each Discovery Accelerator case uses only one location for the search index and one location for the database.

The following examples show two valid configurations for analytics database locations.

Table 3-1 Analytics database locations: example 1

Location	Table File Group	Full Text Indexes
C:\SQL\Data	Checked	Checked
D:\SQL\Data	Checked	Checked
E:\SQL\Data	Checked	Checked
F:\SQL\Data	Checked	Checked

Table 3-2 Analytics database locations: example 2

Location	Table File Group	Full Text Indexes
C:\SQL\Data	Unchecked	Checked
D:\SQL\Data	Unchecked	Checked
E:\SQL\Data	Checked	Unchecked
F:\SQL>Data	Checked	Unchecked

To add a database location for analytics

- 1 Browse to the Accelerator Manager website.
- 2 Right-click the appropriate customer, and then click **Properties**.
- 3 Under **Database Locations For Analytics**, click **New Location**.
- 4 Enter the path to the new database location. Note the following:
 - The database locations must reside on the SQL server, and you must use local paths to refer to them. For example, do not use UNC paths to refer to database locations.
 - The Accelerator Manager website does not verify that the specified locations exist. You must ensure that the paths are valid.
- 5 Check **Table File Group, Full Text Indexes**, or both.
- 6 Click **OK** next to the new location.
- 7 Repeat steps 3 through 6 if you want to add more database locations.

Setting up a Custodian Manager website

Custodian Manager is a browser-based application with which you can store the details of the custodians (individual employees) and custodian groups for which you want to search with Discovery Accelerator. A custodian group is any collection of employees, such as Windows or Domino groups and distribution lists, Active Directory or Domino LDAP searches, and Active Directory containers. After you have added the custodians and custodian groups to Custodian Manager, you can pick from them when you define the criteria for a Discovery Accelerator search.

Note: A Discovery Accelerator configuration database can have one Custodian Manager website only. All customers that share the configuration database share Custodian Manager.

To set up a Custodian Manager website

- 1 Open the Accelerator Manager website.

If you have installed Discovery Accelerator on a server in which User Account Control (UAC) is enabled, you must open the Accelerator Manager website with administrator privileges.
- 2 Right-click the server node in the left pane, and then click **New Customer**.
- 3 In the Create Customer page, set the customer type to **Custodian Manager**.
- 4 Enter your preferred IIS and SQL database details, and then click **OK**.

- 5 Browse to the Custodian Manager website that you have just created. The address of this website takes the following form:

`http://server_name/virtual_directory`

For example:

`http://server2/EVBACustodianManager`

- 6 Use the facilities in Custodian Manager to create and manage the custodians and custodian groups. For instructions on how to do this, see the *Administrator's Guide* and the online Help for Custodian Manager.

Assigning the required Active Directory permissions to the Custodian Manager synchronization account

By default, Custodian Manager uses the account under which the Accelerator Manager service is running when it synchronizes custodians and custodian groups with the corresponding Active Directory accounts. However, if you prefer, you can nominate a different account on a per-domain basis.

For instructions on how to specify a different user account for synchronization purposes, see the *Administrator's Guide*.

The nominated synchronization account must have certain delegated permissions to query the Active Directory domain.

To assign the required delegated permissions to the Custodian Manager synchronization account

- 1 Open Active Directory Users and Computers.
- 2 Right-click the domain object, and then select **Delegate Control**.
- 3 In the Delegation of Control Wizard, click **Next**, and then click **Add**.
- 4 In the Select Users, Computers, or Groups dialog box, enter the required account name, and then click **OK**, and then click **Next**.
- 5 In the Tasks to Delegate page, in **Delegate the following common tasks**, check the following tasks, and then click **Next**:
 - Read all user information
 - Read all inetOrgPerson information
- 6 Click **Finish**.

Enabling the Custodian Manager synchronization account to access the Deleted Objects container

The Custodian Manager synchronization account must also have List Content and Read Property permissions on the Deleted Objects container in Active Directory.

Without these permissions, it is not possible to deactivate any custodians and custodian groups whose Active Directory details have been moved to the Deleted Objects container.

The following article on the Microsoft website provides detailed instructions on how to view and set permissions on the Deleted Objects container:

[http://technet.microsoft.com/en-us/library/cc816824\(WS.10\).aspx](http://technet.microsoft.com/en-us/library/cc816824(WS.10).aspx)

Note: You require a recent version of the `dsacls` command-line utility to complete the instructions in this article. Some older versions of the utility do not support all the required commands.

In brief, the procedure is as described below.

To enable the Custodian Manager synchronization account to access the Deleted Objects container

- 1 Open a Command Prompt window with administrator privileges.
- 2 Take ownership of the Deleted Objects container by running the `dsacls` command-line utility, as follows:

```
dsacls deleted_objects_dn /takeownership
```

where the parameters are as follows:

<code><i>deleted_objects_dn</i></code>	The distinguished name of the Deleted Objects container.
--	--

<code>/takeownership</code>	Take ownership of the Deleted Objects container.
-----------------------------	--

For example:

```
dsacls "CN=Deleted Objects,DC=Contoso,DC=com" /takeownership
```

- 3 Grant the List Content and Read Property permissions to the user account under which Custodian Manager synchronizes custodians and custodian groups, as follows:

```
dsacls deleted_objects_dn /G user_or_group:permissions
```

where the parameters are follows:

<code><i>deleted_objects_dn</i></code>	The distinguished name of the Deleted Objects container.
--	--

<code><i>user_or_group</i></code>	The user or group to whom the permissions apply.
-----------------------------------	--

permissions

The permissions to grant. For List Content and Read Property, specify the permissions as LCRP.

For example:

```
dsacls "CN=Deleted Objects,DC=Contoso,DC=com" /G  
CONTOSO\VaultAdmin:LCRP
```

Uploading the Discovery Accelerator report templates

Using Microsoft SQL Server Reporting Services as the reporting mechanism, Discovery Accelerator provides extensive facilities for monitoring the details of a case and validating compliance with discovery requests. For information on the available reports and guidelines on how to use them, see the *Administrator's Guide*.

To make the reports available to users of the Discovery Accelerator client, you must upload the supplied template (.rdl) files to your SQL reporting server. The template files contain data retrieval and layout information for their respective reports in XML format.

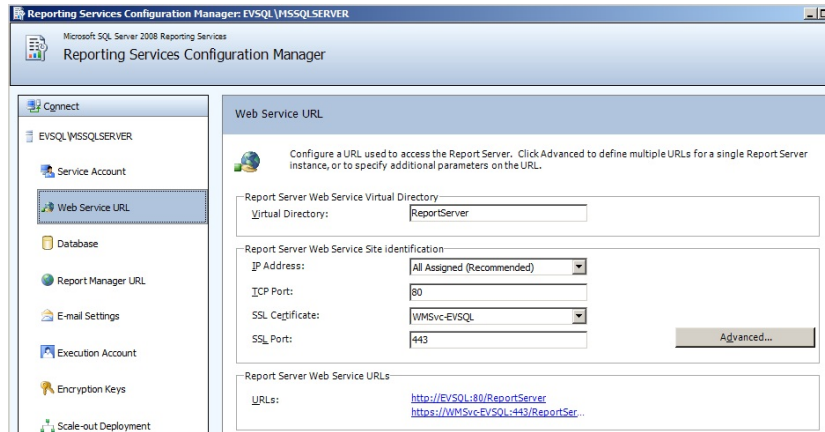
Note: Any reports that you used with Discovery Accelerator 2007 or earlier are not suitable for use with Discovery Accelerator 11.0.

To upload the Discovery Accelerator report templates

- 1 If you have not already done so, install and configure SQL Server Reporting Services on the selected reporting server.

You can check the configuration of SQL Server Reporting Services by using the Reporting Services Configuration Manager on the reporting server. Make a note of the virtual directory name on the Web Service URL page, as you need to specify this name later. The default name of the virtual directory is **ReportServer**.

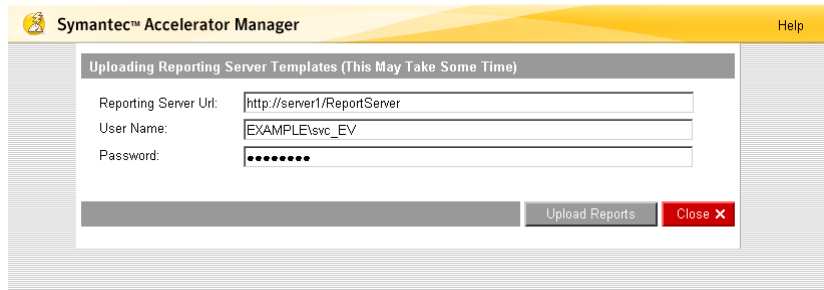
The following figure shows the typical settings in a Web Service URL page.



- 2 On the SQL reporting server, assign the following roles to the Vault Service account:
 - The System Administrator role on the SQL reporting server.
 You can assign this role by using the browser-based Report Manager tool that comes with SQL Server. First click **Site Settings** on the global toolbar in Report Manager and then click **Security**. Then click **New Role Assignment** and assign the System Administrator role to the Vault Service account.
 - The Content Manager role on the Home folder of the SQL reporting server.
 To assign this role in Report Manager, click **Security** on the **Properties** tab for the Home folder. Then click **New Role Assignment** and assign the Content Manager role to the Vault Service account.

See the Microsoft Reporting Services documentation for more information.

- 3 On the Discovery Accelerator server, open the Accelerator Manager website.
- 4 Click **Reporting Server** at the bottom of the page.
 The Uploading Reporting Server Templates page appears.



- 5 In the **Reporting Server URL** field, type the URL with which you access the SQL reporting server in the following form:

`http://server_name/virtual_directory`

where *server_name* is the host name, fully qualified domain name, or IPv4 or IPv6 address of the SQL reporting server, and *virtual_directory* is the name of the required virtual directory. For example:

`http://EVSQL/ReportServer`

Note the following:

- If you have multiple SQL Server instances, type the URL in the following form:
`http://server_name/virtual_directory$instance_name`
 - If you have configured the SQL reporting server to listen for HTTP requests on a port other than the default, 80, type the URL in the following form:
`http://server_name:port_number/virtual_directory`
- 6 In the **User Name** field and **Password** field, type the credentials for the Vault Services account. By doing so, you identify the Vault Services account as the owner of all exchanges between the Discovery Accelerator server and SQL reporting server.

Caution: The Accelerator Manager website does not authenticate the logon credentials that you enter, so it is important to enter the correct ones. If you omit the credentials or enter the wrong ones, Discovery Accelerator client users receive the error message "An error occurred creating the report" when they try to generate reports.

- 7 Click **Upload Reports**.

Note that it can take several minutes to upload the report templates to the server. A confirmation message appears when the process has completed.

Installing Discovery Accelerator in a clustered environment

Symantec does not support installing the Discovery Accelerator server software on any node in a Windows Server failover cluster or Veritas Cluster Server (VCS) cluster. So, if you have configured Enterprise Vault for use in a cluster, you must not install the server software on one of the cluster nodes. However, an unclustered Discovery Accelerator installation can reference a clustered Enterprise Vault virtual server.

In addition, you can enhance the scalability, performance, and high availability of Discovery Accelerator by configuring it for use in a Network Load Balancing cluster.

Configuring Discovery Accelerator for use in a Network Load Balancing cluster

Network Load Balancing (NLB) is a clustering technology that Microsoft offers as part of Windows Server 2008 R2 and Windows Server 2012.

NLB balances the network traffic across all the nodes in a cluster, which work together to run a common set of applications and provide the image of a single system to client users. NLB helps to enhance the scalability and performance of Discovery Accelerator by distributing client requests across the nodes in the cluster; background Discovery Accelerator tasks are unaffected. It also provides high availability by detecting node failures and automatically redistributing traffic to operational nodes.

The process of setting up an NLB cluster requires you to specify a virtual name or IP address for the cluster. When they start the Discovery Accelerator client, your users must specify this virtual name or address as the server to which they want to connect.

For more information on load balancing, see the *Best Practices Guide*. This is available from the following page of the Symantec Support website:

<http://www.symantec.com/docs/TECH159520>

To configure Discovery Accelerator for use in an NLB cluster

- 1 Ensure that each node that you want to include in the NLB cluster has a fixed IP address.

If you do not have these fixed addresses, you can obtain them from your network administrator.

- 2 Use the Network Load Balancing Manager that comes with Windows to set up and manage the cluster.

Consult the documentation that accompanies Network Load Balancing Manager for guidelines on how to do this.

- 3 Install the Discovery Accelerator server software on each node in the cluster.
As a minimum, you must install the Enterprise Vault Accelerator Manager service on each node.

Maximizing security in your Discovery Accelerator databases

By default, the Vault Service account owns all the Discovery Accelerator databases and can access all the objects in them. To maximize security in your SQL Server environment, you may want to change the ownership of each database and revoke many of the Vault Service account's access privileges. The following article on the Symantec Support website describes how to perform these activities:

<http://www.symantec.com/docs/HOWTO80670>

Installing the Discovery Accelerator client software

Caution: The version of the client software that you install on your users' computers must exactly match that of the Discovery Accelerator server software on the Discovery Accelerator server.

Modifying the configuration file for the Discovery Accelerator client

Before you proceed, it is a good idea to modify the configuration file that accompanies the installation package. One of the settings in this file is the name or address of the computer on which you have installed the Discovery Accelerator server software. By providing this information in the configuration file, you can save your users from having to supply the computer name or address when they first start the Discovery Accelerator client.

To modify the configuration file for the Discovery Accelerator client

- 1 Locate the configuration file `AcceleratorClient.Exe.Config` in the installation media for the Discovery Accelerator client software.
- 2 Open the configuration file in a plain text editor such as Windows Notepad.
- 3 Find the following configuration setting:

```
<add key="AcceleratorServer" value="localhost" />
```

- 4 Replace the value with the name, fully qualified domain name, or IPv4 or IPv6 address of the computer on which you installed the Discovery Accelerator server software. For example:

```
<add key="AcceleratorServer" value="server2" />
```

If you have configured Discovery Accelerator for use in a Network Load Balancing cluster, you must specify the virtual name or IP address of the cluster.

- 5 Save and close the file.

Using the MSI installer package to install the Discovery Accelerator client

Typically, you distribute the Discovery Accelerator client software by directing users to a central location from which they can run the MSI installer package. By default, the installer package for the Discovery Accelerator client software performs a per-user installation of the software. This type of installation does not permit other users of the computer to run the application. However, if you have administration privileges on the computer and want to permit all users to run the application, you can perform a per-machine installation.

To install the Discovery Accelerator client software

- 1 Ensure that the configuration file `AcceleratorClient.Exe.Config` file is in the installation folder for the Discovery Accelerator client software.
- 2 Do one of the following:
 - To perform a per-user installation, start the Discovery Accelerator installer package (Symantec Enterprise Vault Discovery Accelerator Client.msi).
 - To perform a per-machine installation, open a Command Prompt window and then type the following:

```
msiexec /I "path_to/Symantec Enterprise Vault Discovery Accelerator Client.msi" INSTALLDIR="install_path" ALLUSERS=1
```

Where:

path_to Specifies the path to the .msi file.

install_path Specifies the path to the folder in which to create an Enterprise Vault Discovery Accelerator subfolder for the client software.

For example, if the .msi file is located at the root of the D: drive, and you want to install the client software in the folder `C:\Program Files`

(x86)\Enterprise Vault Discovery Accelerator, you must type the following:

```
msiexec /I "D:\Symantec Enterprise Vault Discovery Accelerator Client.msi" INSTALLDIR="C:\Program Files (x86)" ALLUSERS=1
```

Caution: If User Account Control (UAC) is enabled on your computer, you must open the Command Prompt window with administrator privileges.

- 3 Follow the on-screen instructions.

Ports that Discovery Accelerator uses

This appendix includes the following topics:

- [Default ports for Discovery Accelerator](#)
- [Changing the ports that Discovery Accelerator uses](#)

Default ports for Discovery Accelerator

[Table A-1](#) lists the default ports that Discovery Accelerator uses.

Table A-1 Default ports for Discovery Accelerator

Port	Used for
80 for HTTP, or 443 for HTTPS	Communications between the SQL reporting server and the Discovery Accelerator clients and server.
1433	Communications between the Discovery Accelerator server and the SQL Server computer.
8085	Communications between the Discovery Accelerator server and the Discovery Accelerator websites (Accelerator Manager, Custodian Manager, and Discovery Accelerator API).
8086	Communications between the Discovery Accelerator server and the Discovery Accelerator clients.

Discovery Accelerator uses standard DCOM ports to communicate with the Enterprise Vault server for searching, reviewing, and exporting. For information on the ports that Enterprise Vault uses, see the Enterprise Vault *Administrator's Guide*.

Changing the ports that Discovery Accelerator uses

You can set Discovery Accelerator to use different ports if another application requires the default ones.

To change the port used for communications with the SQL reporting server

- 1 On the Discovery Accelerator server, open the Accelerator Manager website.
- 2 Click **Reporting Server** at the bottom of the page.

The Uploading Reporting Server Templates page appears.

- 3 In the **Reporting Server URL** field, type the URL with which to access the SQL reporting server in the following form:

http://server_name:port_number/virtual_directory

To change the port used for communications with the SQL Server computer

- 1 If the Enterprise Vault Accelerator Manager service is running on the Discovery Accelerator server, stop it.
- 2 See the following article on the Symantec Support site for instructions on how to amend the configuration files on the Discovery Accelerator server:

<http://www.symantec.com/docs/TECH51129>

The name of the SQL Server computer appears in multiple configuration files. In each case, you must append the required port number to the SQL Server name, as in *server_name:port_number*.

- 3 Restart the Enterprise Vault Accelerator Manager service.
- 4 On the Discovery Accelerator server, open the Accelerator Manager website.
- 5 In the left pane, right-click the name of the SQL Server computer and then click **Properties**.
- 6 In the **Name** field, specify the required SQL Server computer as *server_name:port_number*.
- 7 Click **OK** to save the change that you have made.
- 8 For each customer database, do the following:
 - In the left pane, right-click the name of the database and then click **Properties**.
 - In the **SQL Server** field, specify the required SQL Server computer as *server_name:port_number*.
 - Click **OK** to save the change that you have made.

To change the port used for communications between the Discovery Accelerator server and the Discovery Accelerator websites

- 1 On the Discovery Accelerator server, locate the copies of the `Web.config` file in the `AcceleratorAdminWeb` and `CustodianManagerWeb` subfolders of the Discovery Accelerator installation folder.
- 2 Open each file in a text editor such as Windows Notepad.
- 3 Find the following line, and change the port number to a suitable alternative.

```
<add key="RemotePort" value="8085"/>
```

- 4 Save and close the files.
- 5 Restart the Enterprise Vault Accelerator Manager service.

To change the port used for communications between the Discovery Accelerator server and the Discovery Accelerator clients

- 1 On each Discovery Accelerator client computer, locate the `AcceleratorClient.Exe.Config` file in the installation folder.

This folder is typically `%HOMEPATH%\Local Settings\Application Data\Enterprise Vault Discovery Accelerator\Client`.

- 2 Open the file in a text editor such as Windows Notepad.
- 3 Find the following line, and change the port number to a suitable alternative.

```
<add key="AcceleratorServerPort" value="8086" />
```

- 4 Save and close the file.

Troubleshooting

This appendix includes the following topics:

- [Enterprise Vault Accelerator Manager service not created](#)
- [Enterprise Vault Accelerator Manager service does not start](#)
- [Home page of Discovery Accelerator website not found](#)
- [Cannot create or upgrade Discovery Accelerator customer databases when Symantec Endpoint Protection is running](#)
- [Permissions error when uninstalling the Discovery Accelerator client from a UAC-enabled computer](#)
- [Uninstalling the Discovery Accelerator client from a shared location may prevent other users from starting the client](#)

Enterprise Vault Accelerator Manager service not created

If the installation program is unable to create the Enterprise Vault Accelerator Manager service on the Discovery Accelerator server, you may need to create it manually.

To create the Enterprise Vault Accelerator Manager service manually

- 1 In Windows Explorer, search the folders under your .NET Framework installation for the file `InstallUtil.exe`.
- 2 Open a Command Prompt window.
- 3 Change to the folder that contains `InstallUtil.exe`.

- 4 Run the following command:

```
InstallUtil "InstallFolder\AcceleratorManager.exe"
```

where *InstallFolder* is the path to the folder in which you installed the Discovery Accelerator server software.

- 5 If the command fails, and you have more than one copy of `InstallUtil.exe`, try the same command with each of the other copies.
- 6 If service creation still fails, reinstall the .NET Framework and then type the command again using the newly installed copy of `InstallUtil.exe`.

Enterprise Vault Accelerator Manager service does not start

If you cannot start the Enterprise Vault Accelerator Manager service, check the status of the Windows Management Instrumentation (WMI) service. If the WMI service has stopped, start it and then start the Enterprise Vault Accelerator Manager service.

Home page of Discovery Accelerator website not found

If you receive the message “Page Cannot Be Displayed” when you browse to the home page of the Accelerator Manager website, Custodian Manager website, or Discovery Accelerator API website, start IIS Manager and then check the following:

- The virtual directories have been created.
- The websites are running.
- The virtual directories are configured to use ASP.NET 2.0 rather than an earlier version.

If the installation program failed to create a virtual directory as part of the installation process, you can create it manually.

To create the virtual directory manually

- 1 Open IIS Manager on the server that is hosting the website.
- 2 Right-click the container for your default website and then click **New > Virtual Directory**.
- 3 When the Virtual Directory Creation Wizard appears, click **Next**.

- 4 For the virtual directory alias, type one of the following, and then click **Next**.

EVBAAdmin	Used by the Accelerator Manager website.
EVBACustodianManager	Used by the Custodian Manager website.
EVBADiscovery	Used by the Discovery Accelerator API website.

- 5 For the website home directory, enter the path to the appropriate subfolder of the Discovery Accelerator program folder (`AcceleratorAdminWeb`, `CustodianManagerWeb`, or `DiscoveryWeb`), and then click **Next**.
- 6 When you are prompted to set the access permissions for the virtual directory, click **Next** without changing the default permissions.
- 7 Click **Finish** to close the wizard and create the virtual directory.

To configure the settings for the virtual directory

- 1 Open IIS Manager on the server that is hosting the website.
- 2 Right-click the `EVBAAdmin`, `EVBACustodianManager`, or `EVBADiscovery` virtual directory, and then click **Properties**.
- 3 On the **Virtual Directory** tab, do the following:
 - Make sure that **Read**, **Log visits**, and **Index this resource** are all checked.
 - Remove the entry in the **Application name** box.
 - Make sure that the application pool is set to **EVAcceleratorAppPool**.
- 4 On the **Documents** tab, remove all the entries in the **Enable default content page** box, and then add **Login.aspx**.
- 5 On the **Directory Security** tab, click **Edit** under **Authentication and access control**.
- 6 In the Authentication Methods dialog box, uncheck **Enable anonymous access** and check **Integrated Windows authentication**. (You can select **Basic authentication**, but it is less secure.)
- 7 Click **OK** to save the changes you have made to the Authentication Methods dialog box.
- 8 Click **OK** to close the properties dialog box.
- 9 Check that the website is running.

Cannot create or upgrade Discovery Accelerator customer databases when Symantec Endpoint Protection is running

If Symantec Endpoint Protection is running on your Discovery Accelerator server, you may be unable to create customer databases or upgrade existing ones. We recommend that you shut down Endpoint Protection while you perform these operations.

When the Discovery Accelerator server is running in a centrally managed Endpoint Protection environment, you need only disable the Intrusion Prevention check that is responsible for the issue. Although this disables the Intrusion Prevention check on all servers that are in the same group as the Discovery Accelerator server, it saves you from having to shut down Endpoint Protection completely.

To disable Endpoint Protection's Intrusion Prevention check

- 1 Log on to the computer where the Endpoint Protection Manager Console is running.
- 2 Open the Endpoint Protection Manager Console.
- 3 Click **Policies**.
- 4 Under **View Policies**, click **Intrusion Prevention**.
- 5 In the right pane, right-click your Intrusion Prevention policy, and then click **Edit**.
- 6 Click **Exceptions**.
- 7 Click **Add**.
- 8 Select the signature **ID 20079** in the list, and then click **Next**.
- 9 Set **Action** to **Allow** and **Log** to either option, and then click **OK**.
- 10 Click **OK**.
- 11 Wait a few moments for Endpoint Protection to roll out the policy to the servers in the group.

Permissions error when uninstalling the Discovery Accelerator client from a UAC-enabled computer

When both the following conditions apply, the message "You must be an Administrator to remove this application" appears when you try to uninstall the

Uninstalling the Discovery Accelerator client from a shared location may prevent other users from starting the client

Discovery Accelerator client from a computer in which User Account Control (UAC) is enabled:

- You performed a per-machine installation of the client by using the MSI installer package, `Symantec Enterprise Vault Discovery Accelerator Client.msi`. The issue does not arise when you choose to uninstall a per-user MSI installation.
- You tried to uninstall the client by right-clicking the MSI installer package and then clicking **Uninstall** on the context menu. The issue does not arise when you uninstall the client through the Add or Remove Programs applet in Control Panel.

To uninstall the Discovery Accelerator client in these circumstances

- 1 Open a Command Prompt window with administrator privileges.
- 2 Type the following command:

```
msiexec /x "path_to/Symantec Enterprise Vault Discovery Accelerator Client.msi" /qb!
```

Where the `/x` parameter specifies that you want to uninstall the client, and the `/qb!` parameter displays a basic user interface during the uninstallation process.

Uninstalling the Discovery Accelerator client from a shared location may prevent other users from starting the client

If a user uninstalls the Discovery Accelerator client from the same shared location to which other users have installed the client, these users may no longer be able to start the client. However, they can easily fix the problem by performing a repair installation of their Discovery Accelerator clients.

To perform a repair installation of the Discovery Accelerator client

- 1 On each computer where you want to perform the repair installation, start Control Panel.
- 2 Double-click the **Add or Remove Programs** applet.
- 3 Find and click **Symantec Enterprise Vault Discovery Accelerator Client** in the list of installed programs.
- 4 Click the **Click here for support information** hyperlink.
- 5 Click **Repair**, and then follow the on-screen instructions.

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