About this guide

This section includes the following topics:

- About this guide
- Prerequisite knowledge

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 theCloudLink Google Account Synchronization Guide.

> “ ”

More Information

Prerequisite knowledge

CloudLink revision history

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.

About CloudLink

This section includes the following topics:

- About CloudLink
- Synchronizing user accounts from Microsoft Active Directory
- Synchronizing user accounts from IBM Domino Directory
- Synchronizing user accounts from Google G Suite
- Configuring Personal Archive web folders for Microsoft Exchange mailboxes
- Should I upgrade to CloudLink 4.1.x?
- CloudLink revision history

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 Personal Archive web folders. The Personal Archive web folders enable users to access their 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.

- You can use CloudLink to send welcome email messages to users, informing them about their 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 theCloudLink 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 Arctera Insight 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 Arctera Insight 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 Arctera Insight 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 Arctera Insight Archiving, if required.
- Configure CloudLink to define specific actions in Arctera Insight 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 Arctera Insight 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 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: CloudLink recent revision history provides a version-wise summary of recent application changes.

Table: 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.

CLOUDLINK VERSION	RELEASE DATE	CHANGES
		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
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 VERSION	RELEASE DATE	CHANGES
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 VERSION	RELEASE DATE	CHANGES
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.
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.

CLOUDLINK VERSION	RELEASE DATE	CHANGES
		- 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,

CLOUDLINK VERSION	RELEASE DATE	CHANGES
		the explanatory text was not clear. The text has now been improved.
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 .
		- 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.
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 optionFor user accounts disabled in Active

CLOUDLINK VERSION	RELEASE DATE	CHANGES
		Directorydoes not apply to synchronized accounts with linked mailboxes. SeeConfiguring the additional Active Directory synchronization options.
		- 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 Personal Archive login and archiving for accounts with disabled mailboxes .
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.
		- 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.

CLOUDLINK VERSION	RELEASE DATE	CHANGES
CloudLink 3.3.1	June 2013	Provided support for synchronization of dynamic distribution groups from Microsoft Exchange.

About Exchange mailbox delegation synchronization

This section includes the following topics:

- Introduction to Exchange mailbox delegation synchronization
- About the effects of synchronized delegation permissions
- About the synchronization of delegation permissions with recurring tasks
- Requirements for delegation permissions synchronization
- Synchronizing the delegation permission for a user or a shared mailbox with delegates from different active directory domains

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: Effects of synchronization of delegation permissions granted to a user describes the effects of synchronization of delegation permissions that are granted to a user.

Table: Effects of synchronization of delegation permissions granted to a user

MAILBOX DELEGATION PERMISSION	EFFECT OF THE SYNCHRONIZED PERMISSION IN PERSONAL ARCHIVE
Full Access	The user can read the account's archived items in 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.
Send on Behalf	No effect at this release.

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

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

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

MAILBOX DELEGATION PERMISSION	EFFECT OF THE SYNCHRONIZED PERMISSION IN PERSONAL ARCHIVE
Full Access	Users who are members of the group can read the account's archived items in 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: Requirements for delegate permissions synchronization lists the conditions under which a CloudLink task considers a delegate for delegate permissions synchronization.

Table: 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: Delegate access restrictions if a delegate has a deny permission and synchronization requirements are not met lists the restrictions on delegate access if the synchronization requirement is not met for a delegate with a Deny delegation permission.

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

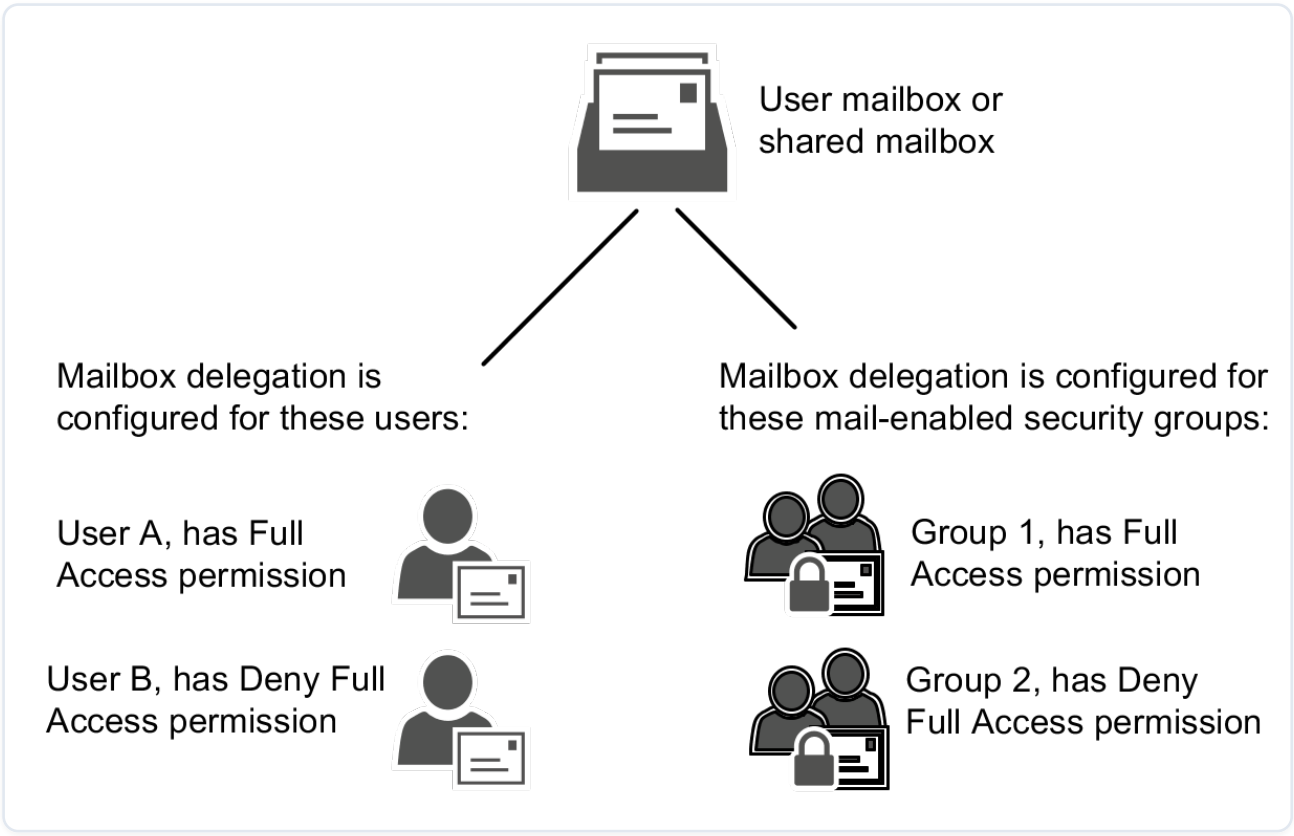
DELEGATE TYPE WITH DENY PERMISSION	IF THIS SITUATION APPLIES	SYNCHRONIZATION TASK TAKES THIS ACTION	RESULT
User	The user does not have a pre-existing archive account.	The task removes any existing synchronized delegate permissions	No-one has delegate access to the mailbox archive.

DELEGATE TYPE WITH DENY PERMISSION	IF THIS SITUATION APPLIES	SYNCHRONIZATION TASK TAKES THIS ACTION	RESULT
		for the delegated mailbox.	
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: Example: Mailbox with delegation permissions set for users and mail-enabled security groups shows a user mailbox or shared mailbox to which the Exchange administrator has assigned a number of mailbox delegation permissions.

Figure: 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 to1.

   > “ ”

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.

System requirements for CloudLink

This section includes the following topics:

- About the requirements for CloudLink
- About the Microsoft Exchange and IBM Domino configurations that are compatible with CloudLink
- CloudLink server requirements
- About the account credentials that CloudLink requires

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.
- See CloudLink server requirements.
- See About the account credentials that CloudLink requires.

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: CloudLink server requirements specifies the requirements for the server on which you run CloudLink.

Table: 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
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.

ITEM	REQUIREMENT
	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 .
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 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 Personal Archive web folders.

See Creating a CloudLink service account for an Exchange environment.

See Creating a CloudLink service account for a Domino environment.

- 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.

Steps to set up CloudLink

This section includes the following topics:

- Steps to set up CloudLink

Steps to set up CloudLink

Table: Principal steps to set up CloudLink lists the major steps that are required to set up CloudLink.

Table: Principal steps to set up CloudLink

STEP	ACTION	REFERENCE
Step 1	Check the requirements for CloudLink.	See About the requirements for CloudLink .
Step 2	Install or upgrade the CloudLink application.	See About installing and upgrading CloudLink .
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 .
		See About setting up CloudLink with Domino .
Step 4	Create the CloudLink tasks to perform the actions you require.	See About creating CloudLink tasks for Domino .
Step 5	Monitor and manage your CloudLink tasks.	-

Installing or upgrading the CloudLink application

This section includes the following topics:

- About installing and upgrading CloudLink
- Performing a new installation of CloudLink
- Upgrading CloudLink
- Uninstalling CloudLink

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.
- See Upgrading CloudLink.

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

- See Uninstalling CloudLink.

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 portal.
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 theAbout CloudLinkchapter 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.

1. Open the **Windows Services MMC**snap-in, and stop the**ArchiveTools CloudLink Server** service.
2. Uninstall the current CloudLink version from **Control Panel**>**Add/Remove Programs**.
3. Download the appropriate CloudLink installation package from the Arctera Support website.
4. 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`
5. 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.

1. 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 (any Arctera app 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.

Setting up CloudLink with Microsoft Exchange

This section includes the following topics:

- About setting up CloudLink with Microsoft Exchange
- Creating a CloudLink service account for an Exchange environment
- Configuring Exchange 2003 servers for CloudLink
- Configuring Exchange Server 2007, 2010, 2013, and 2016 servers for CloudLink
- Starting and closing the CloudLink application
- Configuring CloudLink for Microsoft Exchange
- Reviewing or changing the CloudLink configuration

About setting up CloudLink with Microsoft Exchange

Table: Steps to set up CloudLink with Microsoft Exchange lists the steps that are required to set up CloudLink for use in a Microsoft Exchange environment.

Table: 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 .
Configure the Exchange servers for CloudLink.	Perform the steps for your version of Exchange\:
	- See Configuring Exchange 2003 servers for CloudLink .
	- See Configuring Exchange Server 2007, 2010, 2013, and 2016 servers for CloudLink .
Run the CloudLink configuration wizard.	See Configuring CloudLink for Microsoft Exchange .

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.

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

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: Exchange 2003 server configuration steps lists the configuration steps.

Table: 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 .
Step 2	Assign the required administrator permissions to the CloudLink service account.	See Assigning administrator permissions for the CloudLink service account .
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 .

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”.

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

> “ ”

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: Steps to configure Exchange Server 2007, 2010, 2013, and 2016 for CloudLink lists the configuration steps.

Table: 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 Personal Archive web folders.	See Setting the rights for the CloudLink service account to create and remove web folders .
Step 2	For Exchange 2007 and Exchange 2010 servers, enable Personal Archive web folders in OWA, if required.	See Enabling Personal Archive web folders in OWA .
	Note: Exchange Server 2013 OWA and Exchange Server 2016 OWA do not support web folders.	

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: Commands to set the rights for the CloudLink service account on the Exchange Server lists the required commands for the different versions of Exchange server.

Table: 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 Personal Archive web folders in OWA

If you want Exchange Server 2007 OWA or Exchange Server 2010 OWA to be able to include 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 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

1. 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 selectRun 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 theArchiveTools CloudLinkoption, and then selectRun as administratorfrom 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: CloudLink configuration steps for Microsoft Exchange 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: 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 .
Specify CloudLink Service Account	Provide the credentials of the Windows service account.	See Specifying the CloudLink service account .
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 .
Cloud Archive Credential	Specify the credentials for the Management Console login account that has the System Administrator role.	See Specifying the Management Console credentials .
Configure Sync Properties	Select which properties to synchronize from Active Directory to Arctera Insight Archiving.	See Configuring the Active Directory properties to synchronize .

CONFIGURATION STEP	ACTION	REFERENCE
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 .
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 .
Choose Exchange Servers	Provide the information to enable CloudLink to establish a connection with the Exchange servers whose mailboxes require Personal Archive web folders.	See Choosing the Exchange Server settings for web folder management .
	Note: This step is shown if you select theWeb Folder Management Configurationtask.	
Web Folder Properties	Specify the details for the Personal Archive web folder that CloudLink adds to user mailboxes.	See Configuring the web folder properties .
	Note: This step is shown if you select theWeb Folder Management Configurationtask.	
Report Management	Configure the CloudLink log settings and report settings.	See Configuring report management and logging .
Welcome Message Template	Configure the template for Personal Archive welcome	See Configuring the welcome message template .

CONFIGURATION STEP	ACTION	REFERENCE
	email messages that CloudLink sends.	
	Note: This step is shown only if you select theWelcome Message Templateconfiguration task.	

Additional manual configuration steps

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

Table: CloudLink manual configuration step for Microsoft Exchange

MANUAL CONFIGURATION STEP	DESCRIPTION	REFERENCE
To disable 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 Personal Archive login or both login and archiving for accounts with disabled Exchange mailboxes, you must perform a manual configuration step.	See Disabling Personal Archive login and archiving for accounts with disabled mailboxes .
To disable 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 Personal Archive login or both login and archiving for these accounts, you must perform a manual configuration step.	See Disabling Personal Archive login and archiving for users who leave distribution groups that are targeted with Group-based Sync .

MANUAL CONFIGURATION STEP	DESCRIPTION	REFERENCE
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	See Synchronizing the delegation permission for a user or a shared mailbox with delegates from different active directory domains .
	ArchiveTools.CloudLink.Server.exe.config file.	
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 .

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.

> “ ”

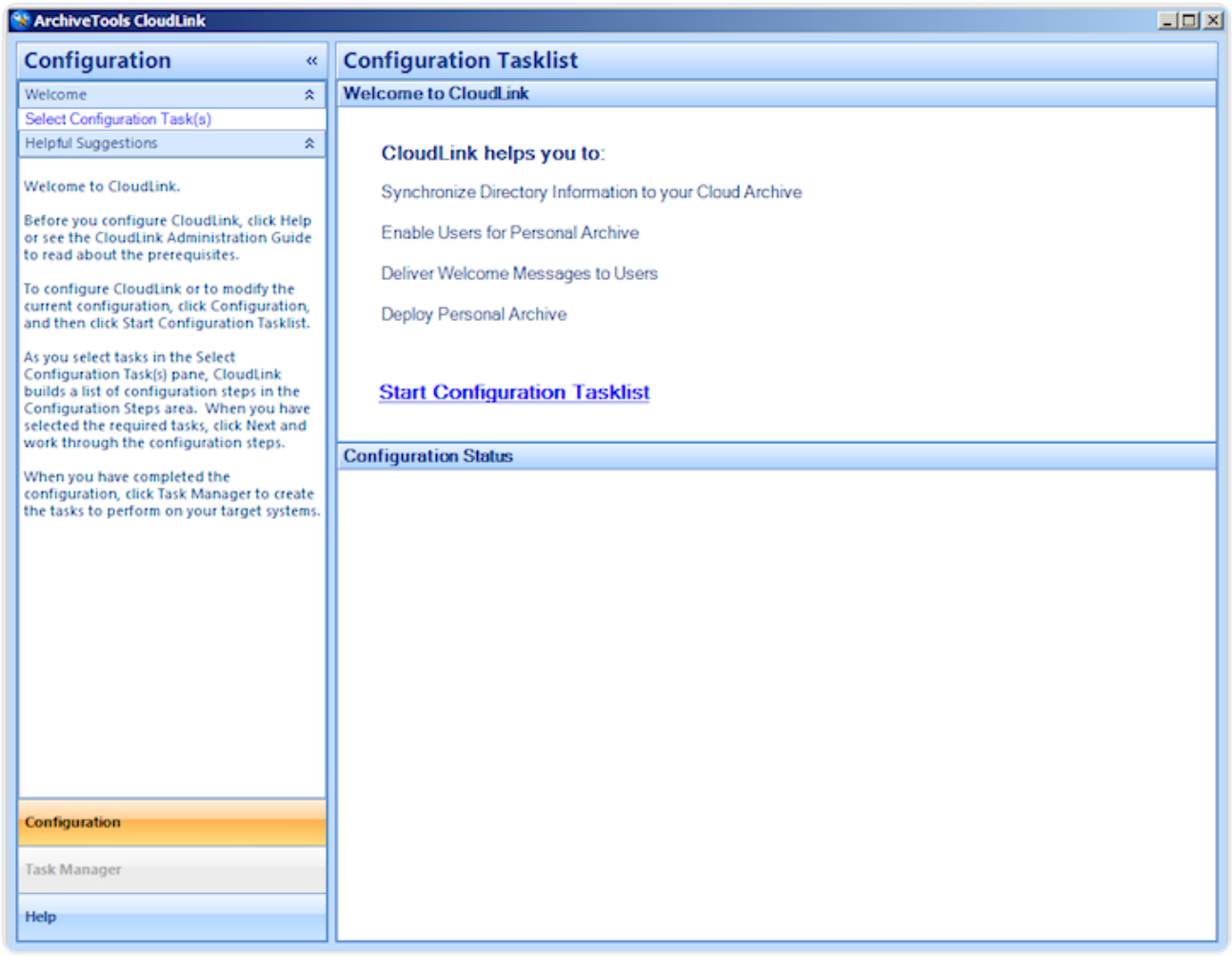
To select the CloudLink configuration tasks

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

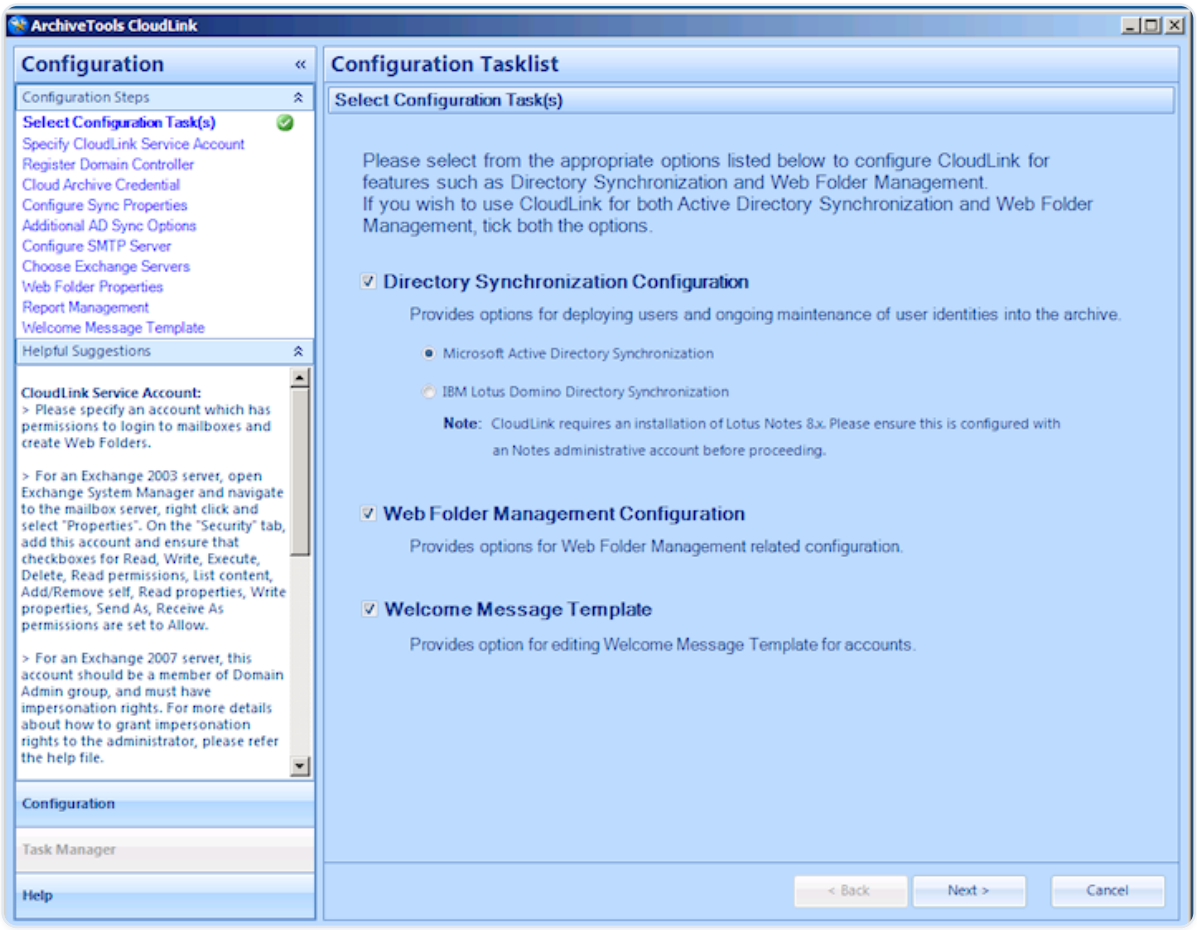
See Starting and closing the CloudLink application.

1. 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.



1. Do one of the following:
    - Click **Select Configuration Task(s)** in the Configuration pane.
    - Or click **Start Configuration Tasklist** in the Configuration Tasklist pane.
2. 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 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 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.

1. 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.

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 formatDomain\Username.

   > “ ”

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

1. In the **Password** box, type the password for the CloudLink service account.
2. In the **Confirm Password** box, re-type the password for the CloudLink service account.
3. To validate the account credentials, you can click the validate account icon that is adjacent to the **Account** box.
4. 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.

1. Click **Add**.
2. 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.

1. Repeat steps 2 to 6 for each domain in the Active Directory forest from which you want to synchronize users with Arctera Insight Archiving.
2. 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.

1. From the **Domain** drop-down list, select a domain from which you want to synchronize the user accounts with Alta Archiving.
2. 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.

1. Select the **Primary** check box.
2. 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 underRegistered 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, thePrimarycolumn displaysYes. If the domain controller is not selected as a primary controller, thePrimarycolumn displaysNo.

  > “ ”

3. Follow the above-mentioned steps for each domain within the Active Directory Forest to synchronize users with Arctera Insight Archiving.
4. 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. SeeShould I upgrade to CloudLink 4.1.x?.

> “ ”

1. 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: IfUserPrincipalNameis selected underAdvanced 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 whenUserPrincipalNamediffers 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 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 .
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**.

1. 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 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 Personal Archive login or login and archiving for all accounts with disabled mailboxes.

See Disabling Personal Archive login and archiving for accounts with disabled mailboxes.

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 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: TheChoose Exchange Server settingsconfiguration step is shown only if you selected theWeb Folder Management Configurationtask on theSelect 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 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.

1. 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.
2. 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.
3. 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 inSelected Email server(s)and then clickRemove.

> “ ”

1. Repeat steps 2 to 7 for each Exchange server whose user mailboxes require Personal Archive web folders.
2. 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 Personal Archive web folder that CloudLink adds to user mailboxes.

> “ ”

Note: TheWeb Folder Propertiesconfiguration step is shown only if you selected theWeb Folder Management Configurationtask on theSelect 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 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. SeeShould I upgrade to CloudLink 4.1.x?.

   > “ ”

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 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.

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.

Configuring the welcome message template

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

> “ ”

Note: TheWelcome Message Templateconfiguration step is shown only if you selected theWelcome Message Templatetask on theSelect Configuration Task(s)page.

> “ ”

To configure the welcome message template

1. Go to the **Welcome Message Template** configuration step.
2. In the **From** box you can change the displayed sender address if required.
3. In the **Subject** box you can change the default subject of the message if required.
4. In the **Body** box you can change the default message body to suit your requirements.

   > “ ”

   Note: CloudLink replaces the{username}and{password}tags with the user name and the temporary password that give initial access to Personal 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 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**.

1. 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.

Disabling Personal Archive login and archiving for accounts with disabled mailboxes

Disabling Personal Archive login and archiving for accounts with disabled mailboxes

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

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

Disabling 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 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 theMailboxDisabledActionparameter and theLeaveCustomQueryOptionparameter to the same value. SeeDisabling Personal Archive login and archiving for users who leave distribution groups that are targeted with Group-based Sync.

> “ ”

To disable 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 Personal Archive login, but do not disable archiving.
- `3`: Disable both Personal Archive login and archiving.

1. Save the changes to the configuration file.
2. 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 Personal Archive login and archiving for mail-disabled users on Exchange 2003

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

To disable 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.

> “ ”

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

> “ ”

1. 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 link.

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

Disabling 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.

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 Personal Archive are not disabled.
- Disable Personal Archive login, but do not disable archiving.
- Disable both 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 theLeaveCustomQueryOptionparameter and theMailboxDisabledActionparameter to the same value. SeeDisabling Personal Archive login and archiving for accounts with disabled mailboxes.

> “ ”

To disable 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 Personal Archive login, but do not disable archiving.
- `3`: Disable both Personal Archive login and archiving.

1. Save the changes to the configuration file.
2. 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.

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

1. 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.

Creating CloudLink tasks for Exchange

This section includes the following topics:

- Accessing Task Manager
- link
- link
- About granting remote account management for CloudLink
- link
- Deselecting task actions for specific users or groups
- link

Accessing Task Manager

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

To access Task Manager

1. If the CloudLink application is not already started, start it.
2. Click the Task Manager tab near the bottom of the left pane.

> “ ”

Note: TheTask Managertab is available only if you have completed some CloudLink configuration steps.

> “ ”

CloudLink displays the Welcome to Task Manager Wizard page.

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

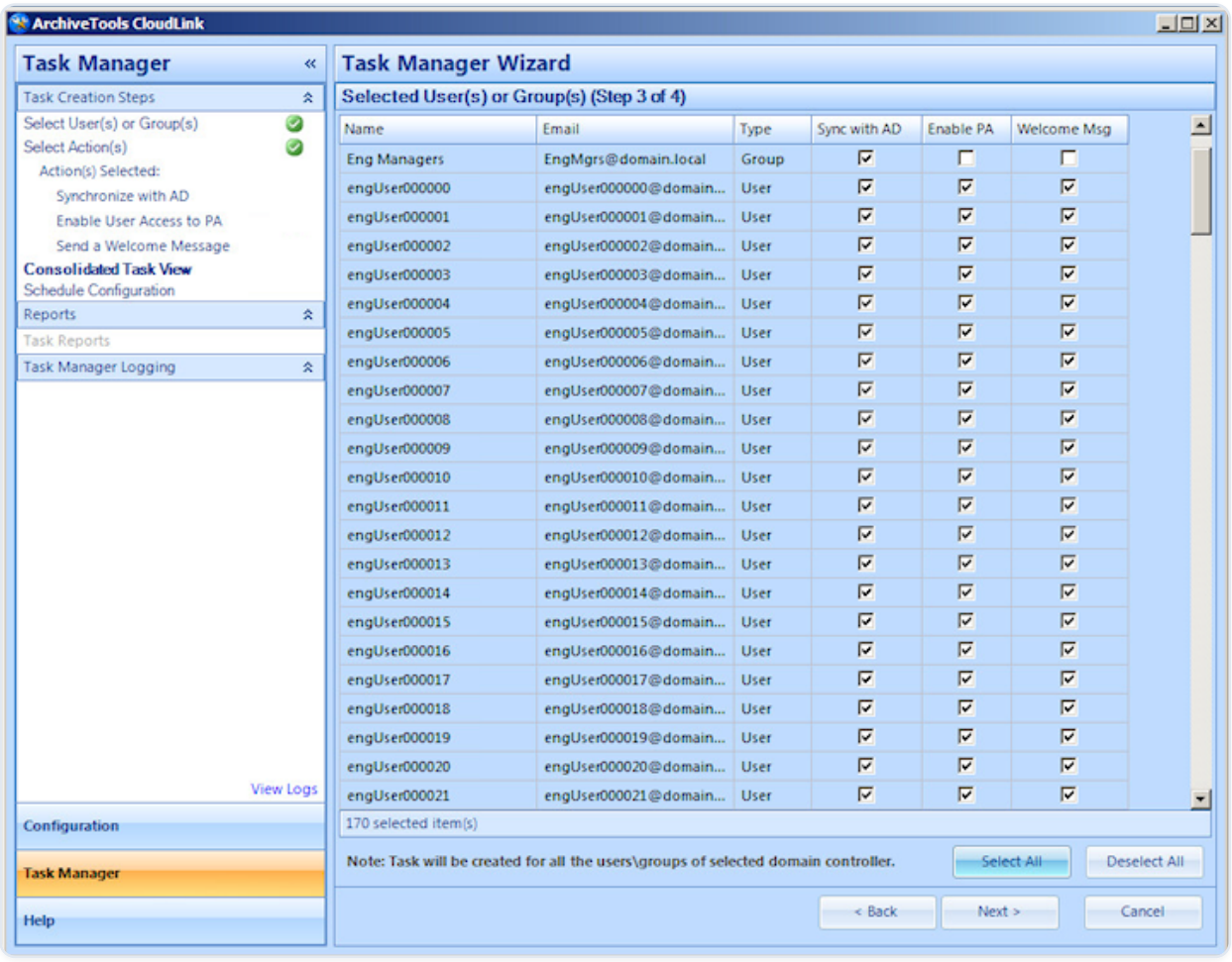
- If you select Yes, CloudLink edits the User Management page for the configured account in the Management Console to select the Manage account provisioning remotely > Using on-premise CloudLink tool option.
- If you select No, CloudLink makes no changes in the Management Console. The actions to enable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

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.

Setting up CloudLink with Domino

This section includes the following topics:

- About setting up CloudLink with Domino
- Creating a CloudLink service account for a Domino environment
- Creating a Notes account for CloudLink and setting up Notes on the CloudLink server
- About configuring the Domino Global Domain Document
- Starting and closing the CloudLink application
- Configuring CloudLink for Domino
- Reviewing or changing the CloudLink configuration

About setting up CloudLink with Domino

Table: Steps to set up CloudLink with IBM Domino lists the steps that are required to set up CloudLink for use in a Microsoft Exchange environment.

Table: 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 .
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 .
Confirm that the Domino Global Domain document is configured.	See About configuring the Domino Global Domain Document .
Run the CloudLink configuration wizard.	See Configuring CloudLink for Domino .

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*.

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 selectRun 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 theArchiveTools CloudLinkoption, and then selectRun as administratorfrom 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: CloudLink configuration steps for IBM Domino lists the configuration steps.

Table: 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 .
Specify CloudLink Service Account	Provide the credentials of the Windows service account for CloudLink to use.	See Specifying the CloudLink service account .
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 .

CONFIGURATION STEP	ACTION	REFERENCE
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 .
Configure Domino Properties to sync	Select the properties to synchronize from Domino Directory to Arctera Insight Archiving.	See Configuring the Domino properties to synchronize .
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 .
Report Management	Configure the CloudLink log settings and report settings.	See Configuring report management and logging .
Welcome Message Template	Configure the template for Personal Archive welcome email messages that CloudLink sends.	See Configuring the welcome message template .
	Note: This step is shown only if you select theWelcome Message Templateconfiguration task.	

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.

> “ ”

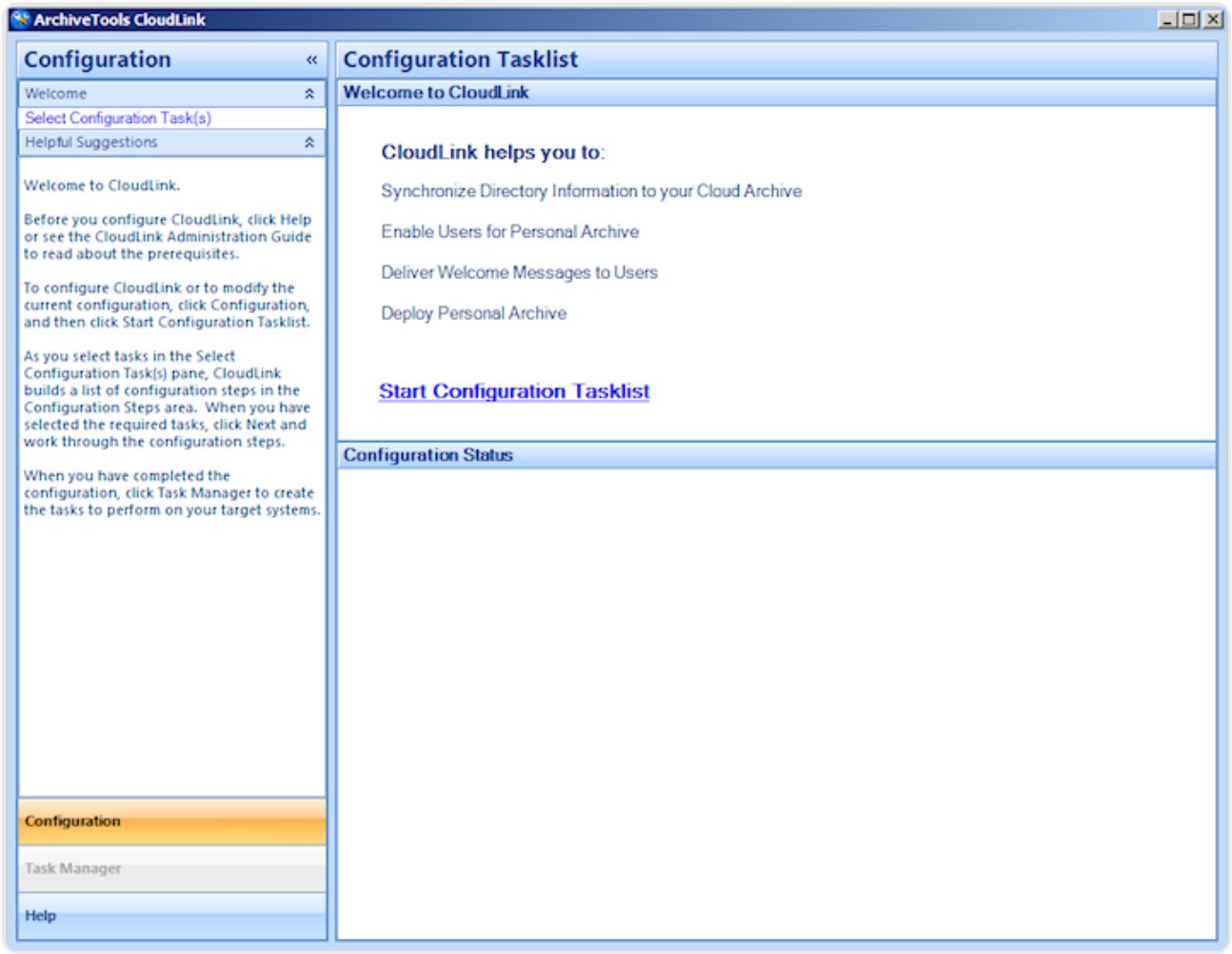
To select the CloudLink configuration tasks

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

See Starting and closing the CloudLink application.

1. 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.



1. Do one of the following:

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

2. On the Select Configuration Task(s) page, select the required configuration tasks:

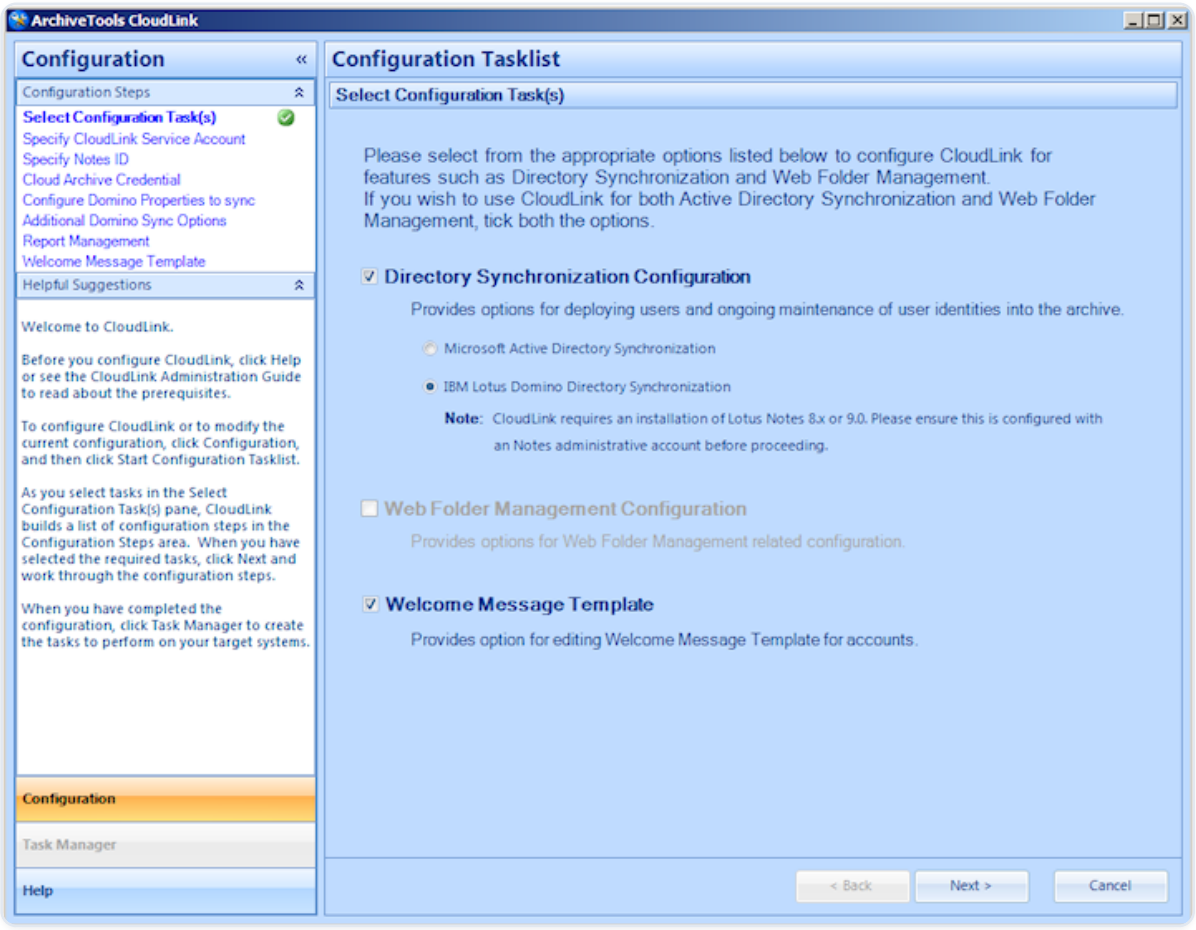
- For a Domino environment, select **Directory Synchronization Configuration**, and then select**IBM Lotus Domino Directory Synchronization**.

> “ ”

Note: When you select IBM Lotus Domino Directory Synchronization, theWeb Folder Management Configurationoption 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.

1. 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.

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 formatDomain\Username.

   > “ ”

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.

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. SeeShould I upgrade to CloudLink 4.1.x?.

> “ ”

1. 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 actionDisable Archiveis 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 theDisable Loginoptions 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.

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.

Configuring the welcome message template

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

> “ ”

Note: TheWelcome Message Templateconfiguration step is shown only if you selected theWelcome Message Templatetask on theSelect 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**.

1. 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.

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.

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

1. 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.

Creating CloudLink tasks for Domino

This section includes the following topics:

- About creating CloudLink tasks for Domino
- Accessing Task Manager
- About the Task Manager Welcome page and Archive User Browser in a Domino environment
- Creating CloudLink tasks for Domino
- Selecting the Domino view on which to perform the task
- Choosing whether to disable Personal Archive access for users in Domino deny groups
- About granting remote account management for CloudLink
- Selecting the actions for a task to perform in a Domino environment
- Scheduling a task
- Reviewing the task parameters

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.

1. Click the Task Manager tab near the bottom of the left pane.

> “ ”

Note: TheTask Managertab is available only if you have completed some of the CloudLink configuration steps.

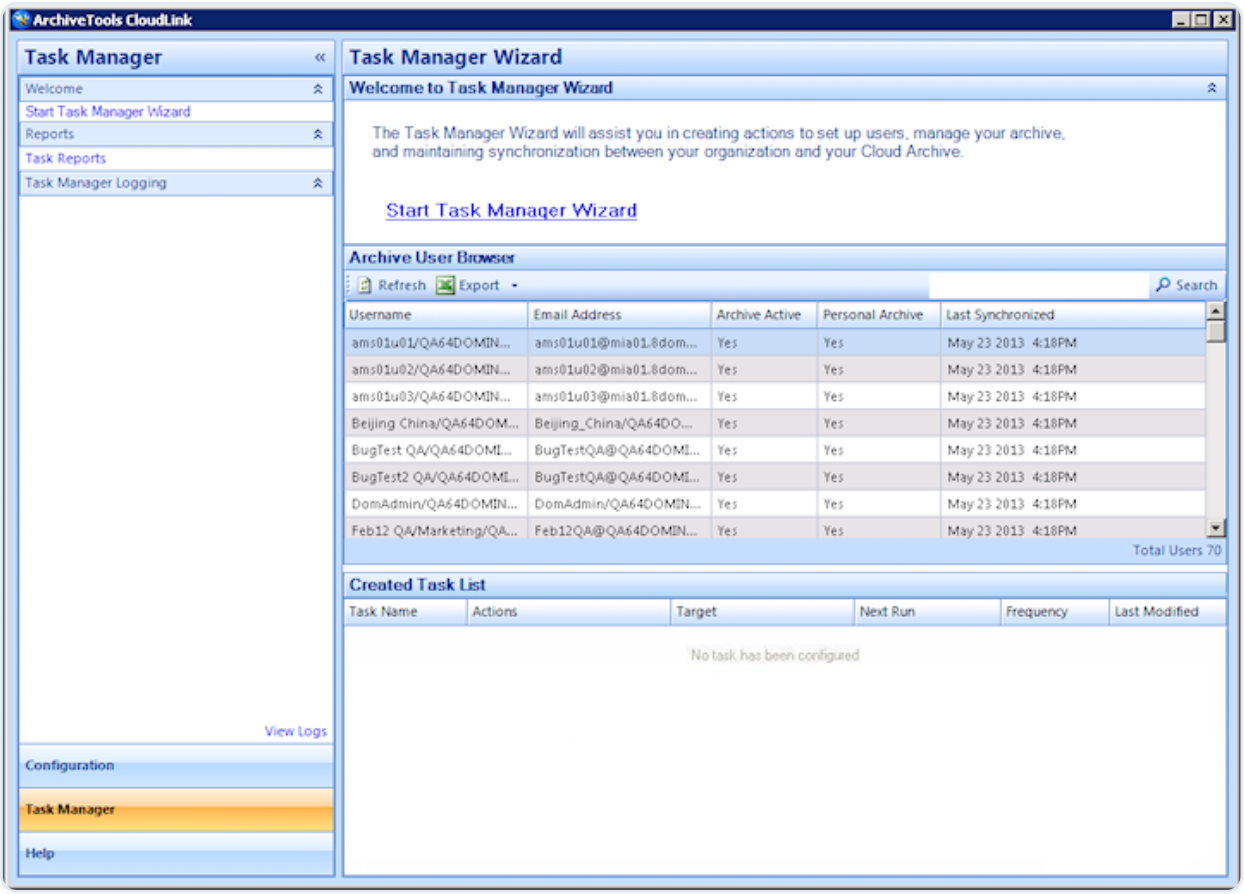
> “ ”

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: Information shown in the Archive User Browser for Domino shows the information that the Archive User Browser displays for each user.

Table: 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.
Archive Active	Yes : Archiving is set to enabled.
	No : Archiving is set to disabled.
Personal Archive	Yes : Access to Personal Archive is set to enabled.
	No : Access to Personal Archive is set to disabled.
Last Synchronized	The date and time of the last synchronization event.

COLUMN	DESCRIPTION
	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 .

> “ ”

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.

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.

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.

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: Creating a CloudLink task for Domino lists the steps that are required to create a task for Domino. The Task Manager wizard takes you through the required steps.

Table: 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 .
Choose whether to disable archive access for users in Domino deny groups.	See Choosing whether to disable Personal Archive access for users in Domino deny groups .
Allow remote account management by CloudLink, if required.	See About granting remote account management for CloudLink .
Select the actions for the task to perform.	See Selecting the actions for a task to perform in a Domino environment .
Schedule the task.	See Scheduling a task .
Review the task parameters and complete the task.	See Reviewing the task parameters .

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.

> “ ”

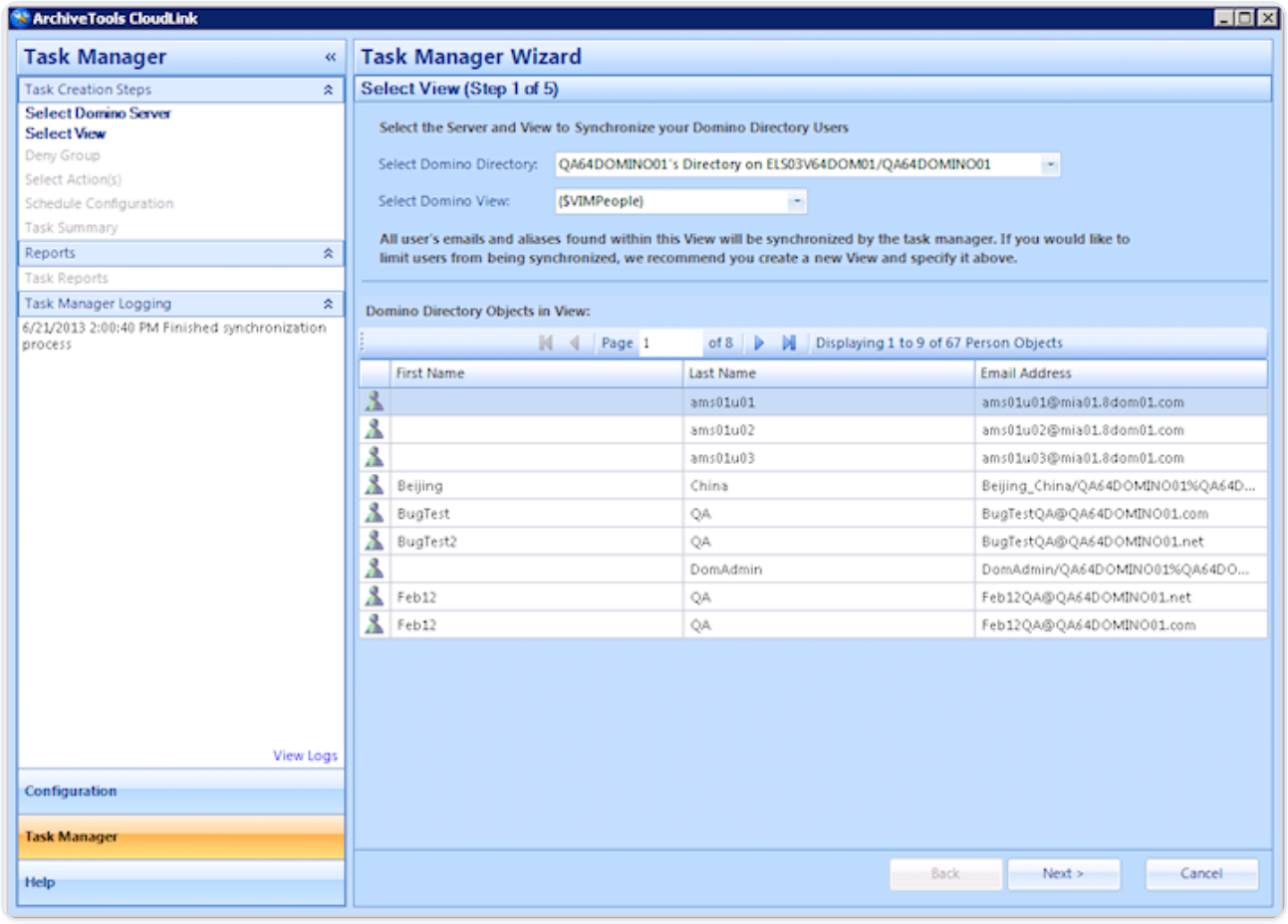
Note: The CloudLink task acts on all of the user accounts that are associated with the selected Domino view. To limit the users on which to perform a task you may want to create a suitable Domino view that contains only the required users, before you continue **Note:** For a Domino mailbox to synchronize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



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

Choosing whether to disable 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 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 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. SeeAbout granting remote account management for CloudLink.

   > “ ”

To disable 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.

1. 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. SeeAbout granting remote account management for CloudLink.

   > “ ”

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 Personal Archive archives
- Create welcome email messages for users with 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 Personal Archive archives and create welcome messages are not selectable in the Task Manager Wizard's Select Action(s) page.

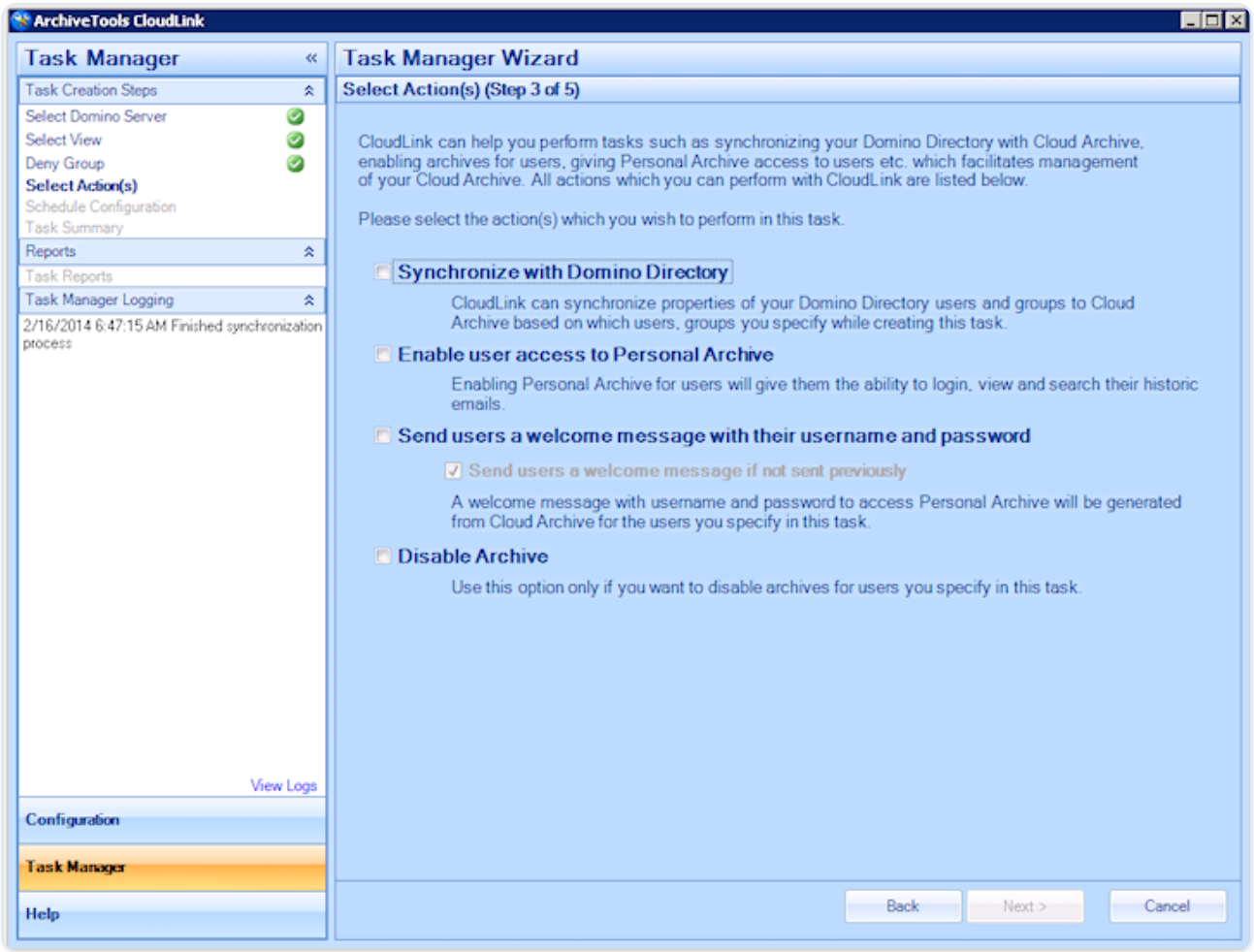
Selecting the actions for a task to perform in a Domino environment

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

> “ ”

Note: The actionsEnable user access to Personal ArchiveandSend users a welcome message with their username and passwordare not available for selection unless the option to manage account provisioning remotely using CloudLink is selected in the Management Console. SeeAbout granting remote account management for CloudLink.

> “ ”



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.

1. 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.

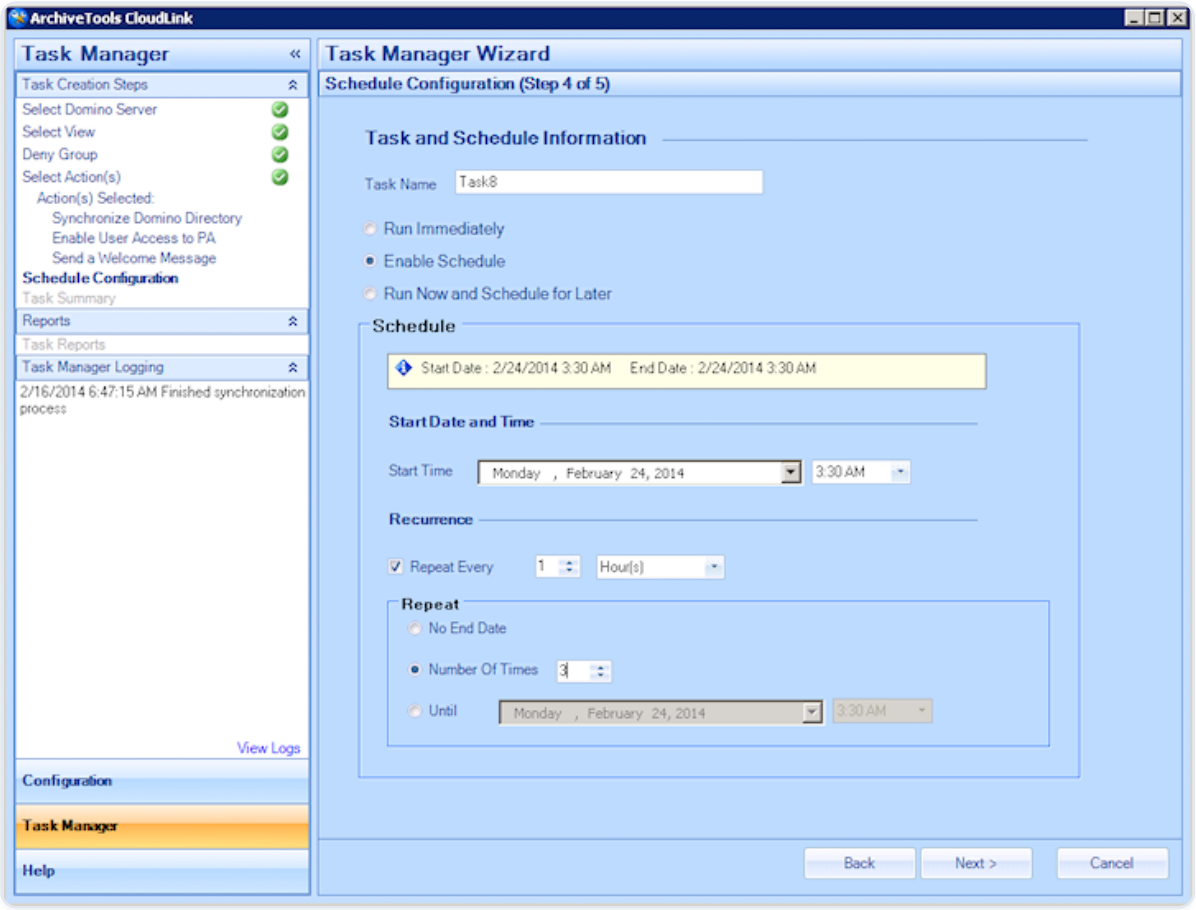
     > “ ”

     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.

- To cancel the creation of the task, click **Cancel**.

Monitoring and managing tasks and archive accounts

This section includes the following topics:

- Viewing the task reports
- About the CloudLink log files
- Optimizing the cloud archive status synchronization
- Exporting archive account information from the Archive User Browser

Viewing the task reports

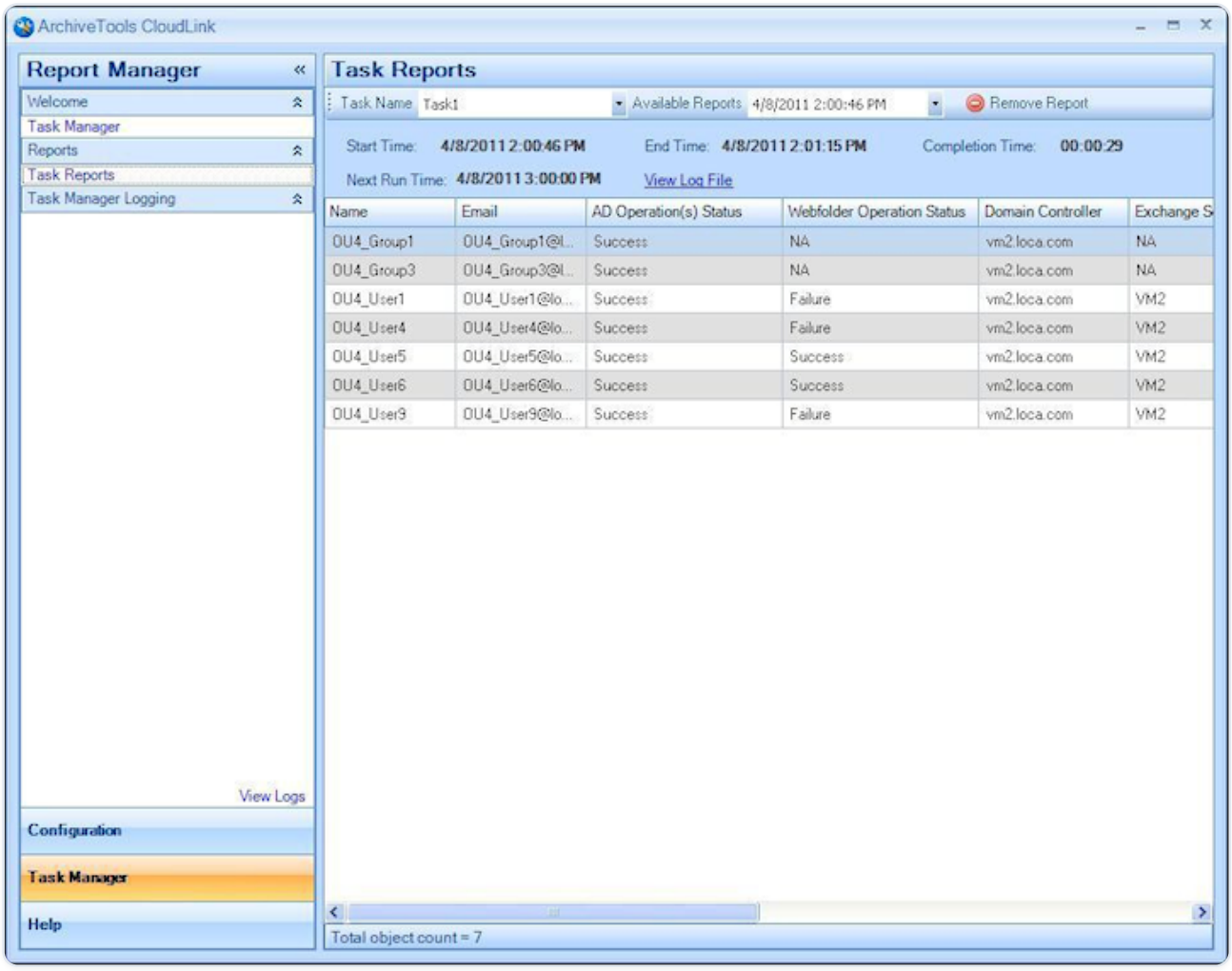
CloudLink generates a report every time a task runs. You can view the task reports to monitor the progress of tasks, including whether each action completed successfully for each user that was a target for the task.

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 statesTask Failedbelow theCompletion 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.

- 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: CloudLink logs lists the details of the log files that CloudLink generates.

Table: CloudLink logs

LOG FILE NAME	DESCRIPTION	QUICK WAYS TO ACCESS THE LOG FILE
`ADSyncLog.txt` (Exchange)	Contains the synchronization details for all executed tasks.	Click View Log File on the Task Reports page.
`DominoSyncLog.txt` (Domino)		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	Click View Log File on the Task Reports page.

LOG FILE NAME	DESCRIPTION	QUICK WAYS TO ACCESS THE LOG FILE
	details such as the creation of web folders.	
		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`	Includes various Active Directory or Domino Directory properties for each user, such as the user principal name.	Not applicable.
(where `nnnnnn` is a timestamp)		

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.

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**.

Known issues and limitations

This section includes the following topics:

- About the known issues and limitations with CloudLink
- CloudLink Personal Archive web folder deployment issues and limitations
- CloudLink Active Directory synchronization limitations
- General CloudLink limitations

About the known issues and limitations with CloudLink

The following sections describe known issues and limitations with CloudLink.

CloudLink Personal Archive web folder deployment issues and limitations

The following issues and limitations relate to CloudLink deployment of 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.