Symantec Enterprise Vault™ Technical Note

Migrating Enterprise Vault to 64-bit hardware

9.0

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Symantec Enterprise Vault: Migrating Enterprise Vault to 64-bit hardware

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About this chapter

This chapter describes the manual procedures you must complete to migrate the 32-bit Enterprise Vault 9.0 servers in your environment to 64-bit servers.

Note: The procedures described in this document do not support the upgrade of Enterprise Vault as part of the migration. On the target servers, you must install the same version of Enterprise Vault that is on the source server. For example, if Enterprise Vault version 9.0.1 is installed on the source server, you must install Enterprise Vault version 9.0.1 on the target server.

This document does not describe the 32-bit to 64-bit migration of other components in your environment, such as Microsoft Exchange Server and Microsoft SQL Server.

You can also use the Enterprise Vault Server Settings Migration wizard to migrate your Enterprise Vault servers. The wizard allows the upgrade of Enterprise Vault during the migration. For more information, see *Migrating Enterprise Vault to 64-bit hardware using the Server Settings Migration wizard* on the Symantec Support website:

http://www.symantec.com/docs/HOWTO42445

If you have any comments on the document, please email them to evdocs@symantec.com.

Preparing your Enterprise Vault environment for the migration

Before you migrate each Enterprise Vault server in your environment, you must disable the archiving options that can cause changes in Enterprise Vault data during the migration.

The procedures in this chapter describe some configuration changes that affect the whole Enterprise Vault environment and that must remain for the duration of the migration. Before you complete each of the procedures, note the current settings so you can revert to the existing configuration when the migration is complete.

Disabling user deletions

For every site in your Enterprise Vault environment, you must prevent users from deleting items from their archives.

To disable user deletions

1   In the Administration Console, right-click the Enterprise Vault site and click **Properties**.

2   Click the **Archive Settings** tab.

3   Clear the **Users can delete items from their archives** option, and then click **OK**.

4   Repeat this procedure for the other sites in your Enterprise Vault environment.

Disabling storage expiry

For every site in your Enterprise Vault environment, you must disable storage expiry.

To disable storage expiry

1   In the Administration Console, right-click the Enterprise Vault site and click **Properties**.

2   Click the **Storage Expiry** tab.

3   Set the **Process Vault Stores** option to **Never**, and then click **OK**.

4   Repeat this procedure for the other sites in your Enterprise Vault environment.

Disabling collections on vault store partitions

For every vault store in your Enterprise Vault environment, you must disable collections.

To disable collections on non-Centera vault store partitions

1   In the Administration Console, right-click the vault store partition and click **Properties**.

2   Click the **Collections** tab.

3   Set the same time in the **Start at** and **End at** times and click **OK**.

4   Repeat this procedure for the other vault store partitions in your Enterprise Vault environment.

To disable collections on Centera vault store partitions

1   In the Administration Console, right-click the Centera vault store partition and click **Properties**.

2   Click the **Collections** tab.

3   Clear the **Enable collections** option and click **OK**.

4   Repeat this procedure for the other Centera vault store partitions in your Enterprise Vault environment.

Disabling archive location updates

For every Exchange mailbox policy in your Enterprise Vault environment, you must prevent users' mailbox item moves from updating their archives.

To prevent mailbox moves from updating archives

1   In the Administration Console, right-click the Exchange mailbox policy and click **Properties**.

2   Click the **Moved Items** tab.

3   Clear the **Update archive location for items moved in the mailbox** option and click **OK**.

4   Repeat this procedure for all the Exchange mailbox policies in all the sites in your Enterprise Vault environment.

Disabling manual archiving

For every Exchange desktop policy in your Enterprise Vault environment, you must prevent users from manually archiving items.

To prevent manual archiving

1   In the Administration Console, right-click the Exchange desktop policy and click **Properties**.

2   Click the **Options** tab.

3   Clear the **Store in vault** options, and then click **OK**.

4   If you see a prompt which asks if you want to apply these changes to OWA, click **Yes**.

5   Repeat this procedure for all the Exchange desktop policies in all the sites in your Enterprise Vault environment.

Disabling user actions in Virtual Vault

For every Exchange desktop policy in your Enterprise Vault environment, you must disable user actions in Virtual Vault.

To disable user actions in Virtual Vault

1   In the Administration Console, right-click the Exchange desktop policy and click **Properties**.

2   Click the **Advanced** tab.

3   In the **List settings from** list, select **Virtual Vault**.

4   Set all the **Users can ...** options to **No** and click **OK**.

5   Repeat this procedure for all the Exchange desktop policies in all the sites in your Enterprise Vault environment.

Applying archiving changes

Some of the configuration changes described in this chapter do not take effect until you complete the actions that are described in the following procedure.

To apply the configuration changes on each Enterprise Vault server

1   Restart IIS.

2   Restart the Storage service.

3   Use the Exchange mailbox archiving task's **Synchronization** tab to synchronize archiving settings for all mailboxes.

Repeat this step for any other Exchange mailbox archiving tasks on the server.

4   Stop the Enterprise Vault provisioning task

5   Repeat this procedure for all the other Enterprise Vault server in your environment.

Preparing each Enterprise Vault server for migration

This section describes the procedures you must complete to prepare each Enterprise Vault server for the migration.

Recording the configuration of the source Enterprise Vault servers

For each 32-bit source server in your Enterprise Vault environment, there must be a replacement 64-bit server that is running the same Enterprise Vault components as its corresponding source server.

Record the Enterprise Vault components that are installed and the roles that the server performs. You can use this information when you deploy the source server's equivalent, 64-bit target server.

Copying the license files from the source Enterprise Vault servers

When you install Enterprise Vault on the target server, you are prompted for a license file. You can copy the installed license file from the source Enterprise Vault servers and place it in a location that is accessible to the target server in preparation for the installation.

Enterprise Vault license files have a `.slf` file extension, and are in the `Installed Licenses` subfolder of the Enterprise Vault installation folder (normally `C:\Program Files\Enterprise Vault`).

Copying the Enterprise Vault Lotus Notes ID file

On each source Enterprise Vault server where you have configured Domino archiving, there is an Enterprise Vault Lotus Notes ID file. Lotus Notes ID files have a `.id` file extension; for example, `EV_archiving_user.id`.

Note: Every Enterprise Vault installation has an `EVStorage.id` file in the Enterprise Vault installation folder (normally `C:\Program Files\Enterprise Vault`). This is not the file you must copy to the new server.

Copy the Enterprise Vault Lotus Notes ID file from the source server, and place it in a location that is accessible to the target server in preparation for the installation of Lotus Notes.

Copying the Domino server ID file

On each source Enterprise Vault Domino Gateway, copy the Domino server ID file, and place it in a location that is accessible to the target server in preparation for the installation of Domino.

Note: If you have partitioned Domino servers on your Enterprise Vault Domino Gateway, ensure you copy the Domino server ID file from each server.

If you have enabled SSL on your Enterprise Vault Domino Gateway, copy the files associated with the certificate, and place them in a location that is accessible to the target server in preparation for the installation of Domino.

Backing up the registry on the source Enterprise Vault servers

On the source server, back up the entire registry and retain it in a secure location.

When you have run the Configuration Wizard on your target server, you can refer to the registry backups and add any customized settings to the registry on the target servers.

Deploying the 64-bit target server

For each 32-bit source server in your environment, you must deploy a new 64-bit target server.

To complete the actions that are listed in this section, refer to the Enterprise Vault documentation, which contains the information you need to configure prerequisites and install Enterprise Vault.

Note: Do not run the Configuration Wizard when you have completed the installation of Enterprise Vault on each server.

For the target server, do the following:

■ Install Windows Server 2008 R2 or later.

■ Install the Enterprise Vault prerequisites on each server to support both Enterprise Vault and the roles it will fulfill. For example, if the server will be used for Exchange Server archiving, refer to the Enterprise Vault documentation to ensure that the prerequisites are satisfied.
Use the Enterprise Vault Deployment Scanner to check the prerequisite software and settings before you install Enterprise Vault.

■ If the target server is an Enterprise Vault Domino Gateway, install Domino.

■ Install Enterprise Vault on the target server.

You must ensure that the target server has the same system locale and time zone as the source server.

To set the system locale and time zone on the target server

1   In Control Panel, open **Regional and Language Options**.

2   Click the **Administrative** tab.

3   Under **Language for non-Unicode programs (System Locale)**, click **Change system locale**.

   If you are prompted for an administrator password or confirmation, type the password or provide confirmation.

4   Select the language, and then click **OK** twice.

5   In Control Panel, open **Date and Time**.

6   On the **Date and Time** tab, click **Change time zone**.

If you are prompted for an administrator password or confirmation, type the password or provide confirmation.

7   Select the time zone. Where applicable, select the option to automatically adjust the clock for Daylight Saving Time, if you used this option on the source server.

Then click **OK**.

Migrating server settings

This section describes the procedures you must complete to migrate files and settings from the source Enterprise Vault server to the target server.

It might not be necessary to complete every procedure on every source server in your environment. For example, if you migrate a server that is not configured to use Centera partitions, it will not have a Centera pool entry authorization file.

Copying shortcut content

The content that appears in Enterprise Vault shortcuts is stored in the following text files in the Enterprise Vault installation folder (normally `C:\Program Files\Enterprise Vault`):

`ShortCutText.txt`   Shortcut content for Exchange mailbox archiving

`LotusShortCutText.txt` Shortcut content for Domino mailbox archiving

Copy these files from the source server to the Enterprise Vault installation folder on the corresponding target server.

Copying automated messages

At certain times, Enterprise Vault sends automated messages. For example, when an Exchange user is enabled for archiving, Enterprise Vault sends a welcome message. Enterprise Vault's automated messages are stored in the following files in the Enterprise Vault installation folder (normally `C:\Program Files\Enterprise Vault`):

■ `ApproachingArchiveQuotaLimit.msg`

- `ArchiveQuotaLimitReached.msg`

- `DisableMailboxMessage.msg`

- `EnableMailboxMessage.msg`

- `EnablePSTMigrationMessage.msg`

- `PSTMigratedMessage.msg`

- `EVMessages.nsf`

If you have customized any of Enterprise Vault's automated messages, copy these files from the source server to the Enterprise Vault installation folder on the corresponding target server.

Copying the Enterprise Vault web application configuration file

The source server might have an Enterprise Vault web application configuration file called `WebApp.ini`, in the Enterprise Vault installation folder (normally `C:\Program Files\Enterprise Vault`).

If `WebApp.ini` exists, copy the file to the Enterprise Vault installation folder on the target server.

Copying Centera pool entry authorization files

If you host vault store partitions on Centera storage devices, one or more pool entry authorization files might exist on the source Enterprise Vault server. These files have a `.pea` file extension.

Copy the pool entry authorization files from the source server to the same folder on the target server. If you copy the files to a different path, you must subsequently update the pool entry authorization file location for each partition on the target server.

See

Copying custom filtering configuration files

If you have configured selective journaling, group journaling, or custom filtering, the following configuration files may exist in the Enterprise Vault installation folder (normally `C:\Program Files\Enterprise Vault`):

- `CF_Replace_Attachment.txt`

- `SelectiveJournal_config.dat`

- `SJGroupFilter.dat`

The Enterprise Vault installation folder also contains an associated subfolder that is called `Custom Filter Rules`. This subfolder contains XML rule definitions and associated files.

Copy these files and the `Custom Filter Rules` subfolder from the source server to the Enterprise Vault installation folder on the corresponding target server.

Copying application configuration files

.NET application configuration files exist by default in the Enterprise Vault installation folder. These files have names that end with `.exe.config`. If you have customized any of these files, copy them to the Enterprise Vault installation folder on the target server.

Copying users' PST and NSF files

If you are migrating PST files or NSF files, and you have manually collected PST and NSF files to a location on the Enterprise Vault server, copy the files to a suitable location. You can copy them to the target Enterprise Vault server or to any other suitable location in your environment.

When the migration to your new environment is complete, you can continue with the migration of PST and NSF files.

Utility configuration files

If you use any of the utilities provided with Enterprise Vault, such as EVSVR and DTrace, additional configuration files and script files may exist in the Enterprise Vault installation folder (normally `C:\Program Files\Enterprise Vault`) or its subfolders. For example:

- EVSVR creates some operation files that have a `.xml` file extension. If you have any EVSVR operation files on your source server, copy them to the Enterprise Vault installation folder on the target server.

- DTrace creates some scripts files that have a `.ini` file extension, and are in the `Scripts for Dtrace` subfolder of the Enterprise Vault installation folder. Copy this folder to the Enterprise Vault installation folder on the target server.

- Enterprise Vault Policy Manager (EVPM) uses some initialization files that have a `.ini` file extension. Copy these files to a suitable location on the Enterprise Vault target server.

Copy these files from the source server to the same folders on the target server.

Enterprise Vault Reports folder

Enterprise Vault places the reports it generates in the `Reports` subfolder of the Enterprise Vault installation folder (normally `c:\Program Files\Enterprise Vault`).

The reports are not required on the target Enterprise Vault server. However, you should copy the `Reports` folder and its subfolders to the target server if you normally retain or post-process the reports.

Suspending Exchange archiving on the source Enterprise Vault server

The Exchange mailbox, public folder, and journal archiving tasks use Microsoft Message Queuing (MSMQ) to communicate with Exchange servers. You must prevent the tasks from adding new messages to the queues. You must also clear the queues before you copy the Enterprise Vault data to the target servers.

The procedures in this section describe how to suspend Exchange archiving on the source server and clear the queues.

Suspending Exchange mailbox and public folder archiving

You must prevent Enterprise Vault from adding new messages to the mailbox task queues. To do this, you must configure the Exchange mailbox and public folder archiving tasks to run to the site schedule, and then clear the site schedule so the tasks never run.

To configure Exchange mailbox archiving tasks to run to the site schedule

1   In the Administration Console, right-click the Exchange mailbox archiving task and click **Properties**.

2   Click the **Schedule** tab.

3   Select the **Use site setting** option and click **OK**.

4   Repeat this procedure for every Exchange mailbox and public folder archiving task on the server.

To clear the site schedule

1   In the Administration Console, right-click the site and choose **Properties**.

2   Click the **Site Schedule** tab.

3   Select the **Selected times** option.

4   Clear the schedule, and click **OK**.

5   Restart the Enterprise Vault Admin service.

Suspending Exchange journal archiving

You must prevent Enterprise Vault from adding new messages to the journal task queues. To do this, you must suspend archiving for each journal mailbox target that is configured on the server.

To suspend archiving for each journal mailbox target

1   In the Administration Console, right-click the journal mailbox and click **Properties**.

2   Clear the **Archive this Journal Mailbox** option and click **OK**.

3   Repeat this procedure for every journal mailbox target that is configured on the server.

Clearing the Enterprise Vault queues

When Exchange mailbox archiving and Exchange journal archiving have been suspended on the source server, you must clear some of the Enterprise Vault queues, and purge some others.

Each Exchange mailbox archiving task has two associated sets of MSMQ queues, each set linked by a common ID. The following example shows the queues associated with one Exchange mailbox archiving task:

■ enterprise vault exchange mailbox task for EVSVR1 080630124740 admin queue

■ enterprise vault exchange mailbox task for EVSVR1 080630124740 r1

■ enterprise vault exchange mailbox task for EVSVR1 080630124740 r2

■ enterprise vault exchange mailbox task for EVSVR1 080630124747 a1

■ enterprise vault exchange mailbox task for EVSVR1 080630124747 a2

■ enterprise vault exchange mailbox task for EVSVR1 080630124747 a3

■ enterprise vault exchange mailbox task for EVSVR1 080630124747 a4

■ enterprise vault exchange mailbox task for EVSVR1 080630124747 a5

■ enterprise vault exchange mailbox task for EVSVR1 080630124747 a6

■ enterprise vault exchange mailbox task for EVSVR1 080630124747 a7

■ enterprise vault exchange mailbox task for EVSVR1 080630124747 admin queue

Each Exchange journal archiving task also has two associated sets of MSMQ queues, each set linked by a common ID. The following example shows the queues associated with one Exchange journal archiving task:

- enterprise vault exchange journaling task for EVSVR1 090707151210 admin queue

- enterprise vault exchange journaling task for EVSVR1 090707151210 r1

- enterprise vault exchange journaling task for EVSVR1 090707151210 r2

- enterprise vault exchange journaling task for EVSVR1 090707151211 admin queue

- enterprise vault exchange journaling task for EVSVR1 090707151211 j1

- enterprise vault exchange journaling task for EVSVR1 090707151211 j2

- enterprise vault exchange journaling task for EVSVR1 090707151211 j3

- enterprise vault exchange journaling task for EVSVR1 090707151211 j4

If you have configured Exchange public folder archiving, the server has an associated set of MSMQs for this task. Some servers also have an Enterprise Vault storage archive queue.

To clear and purge the Enterprise Vault queues

1   Monitor the Enterprise Vault queues and wait for the following queues to reach zero:

- Exchange mailbox task's a2 queue

- Exchange journaling task's j2 queue

- Exchange public folder task's p2 queue

- Storage archive queue (if your server has one)

2   Purge the following queues:

- Exchange mailbox task's a3, a4, a5, a6 and a7 queues

- Exchange public folder task's p3 and p4 queues

3   Wait for the following queues to reach zero:

- Exchange mailbox task's admin queue

- Exchange journaling task's admin queue

- Exchange public folder task's admin queue

Note: Depending on the numbers of message on the queues, these actions might cause warnings to be written to the event log.

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4   Set backup mode on all the server's vault stores and index locations.

5   Wait for the following queues to reach zero:

■   Exchange mailbox task's a1 queue

■   Exchange journaling task's j1 queue

■   Exchange public folder task's p1 queue

Stopping the Enterprise Vault Admin service

When the Enterprise Vault queues are empty, stop the Enterprise Vault Admin service to prevent any further changes to Enterprise Vault data. When you have stopped this service, check that the other Enterprise Vault services also stop.

Stopping Domino on Enterprise Vault Domino Gateways

Before you migrate Enterprise Vault data, stop Domino services on the Enterprise Vault Domino Gateways in your environment.

Migrating Enterprise Vault data

Enterprise Vault's vault store data and index data must be made available to the new server.

For data that is hosted on NAS devices or Windows file servers, there is no need to copy or move the data. It is sufficient to make the storage available to the target server in exactly the same way as it was available to the source server.

SAN-based storage presents itself to servers as locally attached storage. If you use SAN storage, you must detach the storage from the source server and attach it to the target server.

However, when you store your data locally on the Enterprise Vault server, you must copy or move the data to the target servers.

Copying locally stored Enterprise Vault data

If you store any data locally on the source Enterprise Vault server, you must copy or move it to the same locations on the target server. For example, if your vault store partitions are on the `E:\` drive on the source server, you must copy the data to the `E:\` drive on the target server.

Copy the following locations:

- Vault store partitions

- Index locations

- Locations for temporary files that are used in Centera collections

- Shopping service locations

You must also copy the Enterprise Vault cache location to the target server. The path does not have to be the same as it is on the source. If you copy the cache location to a different path, you must subsequently update the cache location entry in the Directory database.

See "Updating the Enterprise Vault cache location" on page 25.

Configuring the Enterprise Vault server name

Note: You do not have to complete this procedure if you have deployed a target server that has the same host name as the source server.

The Enterprise Vault Directory database stores the DNS alias that points to the server, and the server's host name. In each database entry, you must replace the host name of the source server with that of the target server.

At the same time, you must update the DNS aliases that point to your Enterprise Vault servers.

To update the host name of the server and reconfigure its DNS alias

1   Run the following SQL script:

```
Use EnterpriseVaultDirectory
Update ComputerEntry
Set ComputerNameAlternate = 'target_server_name'
Where ComputerNameAlternate = 'source_server_name'
```

where:

target_server_name is the host name of the target server.

source_server_name is the host name of the source server.

2   Reconfigure the DNS alias to point to the new Enterprise Vault server.

Configuring the hostname on the Enterprise Vault Domino Gateway

If the target server is an Enterprise Vault Domino Gateway, you must configure the new hostname in Domino.

Configure the new hostname in the following documents in the Domino directory:

■   Server documents, including port settings

■   Connection documents

■   Internet site documents

Updating the Enterprise Vault installation path

When you install Enterprise Vault on your target server, the installation path may be different from the path on the source server.

Note that the default Enterprise Vault installation path on a 64-bit server is `C:\Program Files (x86)\Enterprise Vault` which is different from the default installation path on a 32-bit server.

If the installation path on your target server is different from the path on the source server, you must update the installation path entry in the Directory database.

To update the installation path

◆ Run the following SQL script:

```
Use EnterpriseVaultDirectory
Update ComputerEntry
Set ComputerRootPath = 'target_server_installation path'
Where ComputerNameAlternate = 'target_server_name'
```

where:

target_server_installation path is the Enterprise Vault installation path on the target server.

target_server_name is the host name of the target server.

Updating the Enterprise Vault cache location

The Enterprise Vault Directory database stores the server's Enterprise Vault cache location.

When you copied the Enterprise Vault cache location from the source server to the target, if it was not possible to use the same path on the target server, you must update the cache location in the Directory database.

To update the entry in the Directory database to match the path you have created on your target server

◆ Run the following SQL script:

```
Use EnterpriseVaultDirectory
Update ComputerEntry
Set CacheLocation = 'target_server_cache_location'
Where ComputerNameAlternate = 'target_server_name'
```

where:

target_server_cache_location is the cache location on the target server.

target_server_name is the host name of the target server.

Making final database changes

To make the final changes to the Directory database

◆ Run the following SQL script.

Remember to change *target_server_name* to the name of your target server.

```
Use EnterpriseVaultDirectory
DECLARE @ComputerNameAlternate EVComputerName
SET @ComputerNameAlternate = 'target_server_name'

UPDATE StorageServiceEntry
SET StorageArchive = '', StorageRestore = '', StorageReplayIndex
= '', StorageSpool = ''
FROM StorageServiceEntry
inner join ComputerEntry on StorageServiceEntry.ComputerEntryId
= ComputerEntry.ComputerEntryId
WHERE ComputerEntry.ComputerNameAlternate = @ComputerNameAlternate

UPDATE ArchivingRetrievalTask
SET MessageQueue = ''
FROM ArchivingRetrievalTask
inner join Task on ArchivingRetrievalTask.TaskEntryId
= Task.TaskEntryId
inner join ComputerEntry on Task.ComputerEntryId =
ComputerEntry.ComputerEntryId
WHERE ComputerEntry.ComputerNameAlternate = @ComputerNameAlternate

UPDATE RetrievalTask
SET RetrievalSpoolQueue = '', MessageQueue = ''
FROM RetrievalTask
inner join Task on RetrievalTask.TaskEntryId = Task.TaskEntryId
inner join ComputerEntry on Task.ComputerEntryId =
ComputerEntry.ComputerEntryId
WHERE ComputerEntry.ComputerNameAlternate = @ComputerNameAlternate

UPDATE JournalTask
SET MessageQueue = ''
FROM JournalTask
inner join Task on JournalTask.TaskEntryId = Task.TaskEntryId
inner join ComputerEntry on Task.ComputerEntryId =
ComputerEntry.ComputerEntryId
WHERE ComputerEntry.ComputerNameAlternate = @ComputerNameAlternate

UPDATE PublicFolderTask
SET MessageQueue = ''
FROM PublicFolderTask
inner join Task on PublicFolderTask.TaskEntryId = Task.TaskEntryId
inner join ComputerEntry on Task.ComputerEntryId =
ComputerEntry.ComputerEntryId
WHERE ComputerEntry.ComputerNameAlternate = @ComputerNameAlternate
```

Running the Configuration Wizard

On the target server, you must run the Enterprise Vault Configuration Wizard.

In new Enterprise Vault installations, the Configuration Wizard lets you add a server to your environment and make configuration choices based on the roles that you want the server to perform. However, based on the procedures you have already completed in the migration to a 64-bit server, the Configuration Wizard recognizes the new server and configures the services that existed on the server that it replaces.

Use one of the procedures in this section depending on whether you have an Enterprise Vault Directory service running in your environment.

- If you are migrating one of a number of servers and have an Enterprise Vault Directory service running on another server, use the first procedure.

- If there is no Enterprise Vault Directory service running in your environment, use the second procedure.

To configure the target server in an environment where another Enterprise Vault Directory service is running

1   Ensure that the Enterprise Vault Directory service is running on at least one server in your environment.

2   Run the Enterprise Vault Configuration Wizard on the target server.

3   On the first wizard page, select the **No, use existing remote Vault Directory** option, and enter the **Computer name** of the server running the Enterprise Vault Directory service.

4   On the final wizard page, click **Close** to close the wizard without starting the Enterprise Vault services.

To configure the target server in an environment without another Enterprise Vault Directory service

1   Run the Enterprise Vault Configuration Wizard on the target server.

2   On the first wizard page, select the **Yes** option and click **Next**.

3   Select the language Enterprise Vault should use and click **Next**.

4   Enter the Vault Service account's credentials and click **Next**.

5   Enter the name of your SQL server and click **Next**.

6   If you see a prompt asking for the Vault Service account's password, enter the password again.

7   When the repair is complete, click **OK**.

Configuring the FSA Reporting web service

Note: This section applies if you want to use FSA Reporting in the 64-bit environment.

You must configure the FSA Reporting web service manually before you can use FSA Reporting. Perform the following procedure on each Enterprise Vault server.

To configure the FSA Reporting web service

1   Open a command prompt window on the Enterprise Vault server.

2   Navigate to the Enterprise Vault installation folder, typically `C:\Program Files (x86)\Enterprise Vault`.

3   Enter the following command on a single line:

    `FSAReportingWebServiceConfig create` *`folderpath EVServer_alias`*

    Where the variables are as follows:

    ■ *`folderpath`* is the path to the FSA Reporting web service binary files. Typically the path is `C:\Program Files (x86)\Enterprise Vault\FSAReporting`. Enclose the path in quotes if it contains spaces.

    ■ *`EVServer_alias`* is the fully qualified computer alias for the Enterprise Vault server, for example `server1.demo.local`.

        To obtain the value of *`EVServer_alias`*, do as follows:

        ■ Start SQL Server Management Studio or SQL Query Analyzer and connect to the SQL Server that runs the Enterprise Vault Directory database.

        ■ Examine the **ComputerEntry** table in the **EnterpriseVaultDirectory** database. Use the value of **ComputerName** that corresponds to this Enterprise Vault server.

    If the configuration of the web service is successful, the utility returns "successful".

4   Open Internet Explorer and enter the following URL to check whether you
    can access the ReportingServer web page:

    ```
    http://EVServer_alias/FSAReporting/FSAReporting.asmx
    ```

    where *EVServer_alias* is the fully qualified computer alias for the Enterprise
    Vault server that you used in step 3.

    If you are prompted for a user name and password, add the required entries
    to Internet Explorer's Local intranet zone.

    See "Adding the FSA Reporting web service locations to Internet Explorer's
    local intranet zone" on page 29.

5   If Internet Explorer displays an error that begins as follows when you attempt
    to access the ReportingServer web page, the trust level is insufficient:

    ```
    [PolicyException: Required permissions cannot be acquired.]
    System.Security.SecurityManager.ResolvePolicy(Evidence
    evidence, PermissionSet
    reqdPset, PermissionSet optPset, PermissionSet denyPset,
    PermissionSet& denied,
    Boolean checkExecutionPermission) +2737909
    System.Security.SecurityManager.ResolvePolicy(Evidence
    evidence, PermissionSet
    reqdPset, PermissionSet optPset, PermissionSet denyPset,
    PermissionSet& denied,
    Int32& securitySpecialFlags, Boolean checkExecutionPermission)
    +57
    ```

    If you see this error, do as follows:

    ■ Navigate to the **FSAReporting** folder in the Enterprise Vault installation
      folder.

    ■ Open the file Web.config with a text editor such as Notepad.

    ■ Find the <system.web> node and add the following tag within it:
      ```
      <trust level="Full"/>
      ```

    ■ Save the Web.config file.

    ■ Check that you can now access the ReportingServer web page successfully.

Adding the FSA Reporting web service locations to Internet Explorer's local intranet zone

Use the following procedure to make sure that the URLs for the FSA Reporting
web service locations are included in Internet Explorer's Local intranet zone.

To add the FSA Reporting web service locations to Internet Explorer's Local intranet zone

1   Start SQL Server Management Studio or SQL Query Analyzer and connect to the SQL Server that runs the Enterprise Vault Directory database.

2   Enter and run the following query:

```
USE EnterpriseVaultDirectory
SELECT WSLocation FROM FSAReportingWSLocations
```

3   Note down all the WSLocation entries that the query returns.

4   Perform the remaining steps of this procedure on the following computers:

   ■ All Enterprise Vault servers.

   ■ Any computer on which a standalone Administration Console is installed.

   ■ Each file server that is enabled for FSA Reporting.

   ■ Any FSA Reporting proxy server, if you find that its scans fail with event log errors.

5   Right-click **Internet Explorer** on the Windows Start menu and click **Run as Administrator**. Then on Internet Explorer's **Tools** menu, select **Internet Options**.

6   On the **Security** tab, click **Local Intranet** and then click **Sites**.

7   On the **Local intranet** dialog, click **Advanced**.

8   Make sure that all of the WSLocation entries that you noted in step 3 are present in the **Local intranet** zone. Add the entries if they are not already present in the Local intranet zone.

   You must add the entries to the Local intranet zone. It is not sufficient to add the entries to the Trusted Sites zone.

9   On the **Security** tab, with **Local intranet** selected, click **Custom level** and make sure that the Local intranet zone's user authentication is set to "Automatic logon only in Intranet zone".
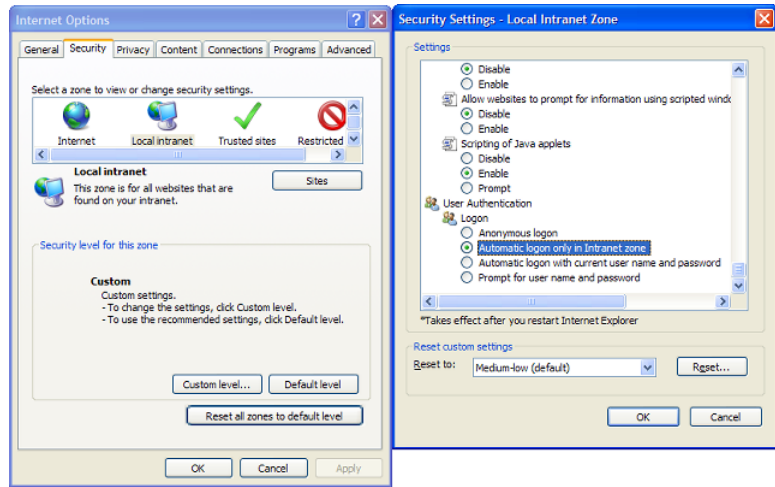
10 Save the Internet Explorer settings and close Internet Explorer.

Customizing the registry

If you customized any registry values on the source server to change the way Enterprise Vault or the operating system operates, you must apply these settings to the registry on the target server.

You can examine the registry backup from your source server to identify the registry values that you must customize on your target server.

See "Backing up the registry on the source Enterprise Vault servers" on page 15.

Enterprise Vault's registry values are set in the following registry key on the 32-bit source server:

```
HKEY_LOCAL_MACHINE
\Software
 \KVS
  \Enterprise Vault
```

However, on the 64-bit target server, Enterprise Vault's registry values are set in the following registry key:

```
HKEY_LOCAL_MACHINE
\Software
 \KVS
  \Wow6432Node
   \Enterprise Vault
```

Note: When you set custom registry values on the target server, ensure that you set them under this registry key.

Updating the Centera pool entry authorization file location

When you copied the Centera pool entry authorization files from the source server to the target, if it was not possible to use the same path on the target server, you must update the path for each Centera partition.

Note: If you use the CENTERA_PEA_LOCATION environment variable to specify the location of the pool entry authorization file, you do not have to complete this procedure.

To update the Centera pool entry authorization file location for a Centera partition

1 On the target server, start the Directory service.

2 In the Administration Console, right-click the Centera partition and click **Properties**.

3 Click the **Connection** tab.

4 In the **Pool Entry Authorization File Location** field, enter the path to the pool entry authorization file, and click **OK**.

5 Repeat this procedure for each Centera partition on the server.

Clearing backup mode

Before you start the remaining Enterprise Vault services on target server, clear backup mode from all the server's vault stores and index locations.

Starting Enterprise Vault services on the target server

When you have completed the procedures described in this document, you can start the remaining Enterprise Vault services on the target server.

Moving Compliance Accelerator servers to new hardware

This chapter includes the following topics:

■ Preparing your Compliance Accelerator environment for the migration

■ Moving the Compliance Accelerator servers to new hardware

Preparing your Compliance Accelerator environment for the migration

This chapter describes how to move an existing 32-bit installation of the Compliance Accelerator server software to 64-bit hardware. Before you begin the process, we recommend that you do the following in the order listed:

■ Instruct all users of the Compliance Accelerator client software to close their clients.

■ Open the Accelerator Manager website, and make a note of the current settings for the Compliance Accelerator configuration and customer databases. The address of the website is typically as follows: http://*server_name*/EVBAAdmin

■ Stop the Enterprise Vault Accelerator Manager service on each server where you have installed Compliance Accelerator. You can use the Services snap-in to Microsoft Management Console to stop the service.

■ Stop the Journaling task on all Enterprise Vault servers.

- Use the facilities in SQL Server Management Studio to do the following:

    - Make a backup copy of the database and transaction log for Compliance Accelerator.

    - Truncate the transaction log.

    Consult the documentation that accompanies SQL Server Management Studio for instructions on how to perform these activities.

Moving the Compliance Accelerator servers to new hardware

Only undertake the following steps after you have completed the preparatory steps described in the previous section.

To move a Compliance Accelerator server to new hardware

1   If you want to move the Compliance Accelerator customer databases and report server database as well as the configuration database and server installation, perform the following activities. If you do not want to move the customer databases and report server database, proceed to step 3.

    - Detach the configuration database, customer databases, and report server database from the current SQL Server instance.

    - Move the detached data files and log files to the new location.

    - Attach the databases to the new SQL Server instance.

    Consult the SQL Server documentation for more information on how to perform these activities. You may find the following articles on the Microsoft website useful:

    - *How to move SQL Server 2005 databases to a new location by using Detach and Attach functions* (http://support.microsoft.com/?kbid=224071)

    - *Moving a Report Server Database to Another Computer in SQL Server 2005* (http://msdn.microsoft.com/en-us/library/ms156421(v=SQL.90).aspx)

    - *How to: Move a Database Using Detach and Attach in SQL Server 2008 R2* (http://msdn.microsoft.com/en-us/library/ms187858.aspx)

    - *Moving the Report Server Databases to Another Computer in SQL Server 2008 R2* (http://msdn.microsoft.com/en-us/library/ms156421.aspx)

2   On each Enterprise Vault server where you have installed the Journaling Connector, update the configuration file for the Journaling Connector as follows:

- Ensure that the Journaling task is not running.

- Locate the appropriate configuration file: `JournalTask.exe.config` for
  Microsoft Exchange environments or
  `EVLotusDominoJournalTask.exe.config` for Lotus Domino environments.
  These files are typically in the folder `C:\Program Files
  (x86)\Enterprise Vault`.

- Make a backup copy of the configuration file.

- Open the configuration file in a text editor such as Windows Notepad.

- Locate the key with the name "DSNConfiguration". For example:

  ```
  <add key="DSNConfiguration" value="server=SQLServer;
    Integrated Security=true;Initial Catalog=EVConfiguration;
    Connection Timeout=500" />
  ```

- Replace *SQLServer* with the fully-qualified domain name of the new SQL
  Server that holds the Compliance Accelerator configuration database.
  Replace *EVConfiguration* with the new name of the Compliance
  Accelerator configuration database.

- Save and close the file.

3 Install the following software on the new Compliance Accelerator server:

- The prerequisite software for the Compliance Accelerator server.

- The Compliance Accelerator server software.

  See the documentation that accompanies Compliance Accelerator for
  guidelines.

4 Copy the following four files from the original server to the Compliance
   Accelerator installation folder on the new server:

- `AcceleratorManager.exe.config`

- `AcceleratorManagerConsole.exe.config`

- `AcceleratorService.exe.config`

- `ADSynchroniser.exe.config`

5 Check and modify the folder paths that are specified in all four configuration
   files. The files contain multiple references to the following:

- The Enterprise Vault installation folder

- The Compliance Accelerator `Reports` folder

■ The Compliance Accelerator `Reports\Share` folder

For example, the files may include the following references to the Compliance Accelerator `Reports` and `Reports\Share` folders:

```
<add key="ReportSourceLocation" value="C:\Program Files\
   Enterprise Vault Business Accelerator\Reports" />
<add key="ReportShare" value="C:\Program Files\
   Enterprise Vault Business Accelerator\Report\Share" />
```

The default installation folder for Compliance Accelerator on 64-bit computers is under the `C:\Program Files (x86)` folder, so you must amend the folder paths in the configuration files accordingly.

```
<add key="ReportSourceLocation" value="C:\Program Files (x86)\
   Enterprise Vault Business Accelerator\Reports" />
<add key="ReportShare" value="C:\Program Files (X86)\
   Enterprise Vault Business Accelerator\Report\Share" />
```

There are other lines within the configuration files that you must update to specify the new installation path for Enterprise Vault.

For more information on editing the configuration files, including additional steps that you need to take when the name of the new Compliance Accelerator server differs from that of the original server, see the following article on the Symantec website:

http://www.symantec.com/docs/TECH55065

6   Save and close the configuration files.

7   Open the Accelerator Manager website on the new Compliance Accelerator server.

8   In the **Configuration Database Details** page, specify the details of your SQL Server and configuration database, and then click **OK**.

Unless the name of your SQL Server has changed, you must specify exactly the same details as you supplied when setting up the configuration database. In particular, check **Use Existing Database** to instruct the Accelerator Manager website to use the specified existing database instead of creating a new one.

9   When the Accelerator Manager website prompts you to do so, restart the Enterprise Vault Accelerator Manager service. You can use the Services snap-in to Microsoft Management Console to restart the service.

10 In the Accelerator Manager website, check and amend the properties of each customer database for which you have moved the existing Compliance Accelerator server to a new server. To amend the properties of a customer

database, right-click its name in the left pane of the Accelerator Manager website and click **Properties**.

Note the following:

- You must ensure that the names of the customer's task server and IIS Server are correct.

  You cannot upgrade a customer database until you have set its **Customer's tasks server** field to a new, running Compliance Accelerator server. In addition, until you have set the **Customer's tasks server** field to the new server, the Accelerator Manager website shows the wrong status for the customer database (Installed rather than Upgrade).

  If you are upgrading to a later version of Compliance Accelerator then, after you have selected the appropriate customer's task server, you can click **Upgrade** to update the customer database and migrate it to the new server. Clicking **OK** migrates the database without upgrading it.

- If you have moved the customer databases to a different SQL Server, you must check that the specified SQL Server and database names are correct.

11 If you have moved the report server database to a different SQL Server, check and amend the details in the **Reporting Server** page of the Accelerator Manager website.

12 Restart the Journaling task on all Enterprise Vault servers.

Moving Discovery Accelerator servers to new hardware

This chapter includes the following topics:

- Preparing your Discovery Accelerator environment for the migration

- Moving the Discovery Accelerator servers to new hardware

Preparing your Discovery Accelerator environment for the migration

This chapter describes how to move an existing 32-bit installation of the Discovery Accelerator server software to 64-bit hardware. Before you begin the process, we recommend that you do the following in the order listed:

- Pause analytics data collection in all cases where you have enabled analytics.

- Instruct all users of the Discovery Accelerator client software to close their clients.

- Open the Accelerator Manager website, and make a note of the current settings for the Discovery Accelerator configuration and customer databases. The address of the website is typically as follows:
  http://*server_name*/EVBAAdmin

- Stop the Enterprise Vault Accelerator Manager service on each server where you have installed Discovery Accelerator. You can use the Services snap-in to Microsoft Management Console to stop the service.

- Use the facilities in SQL Server Management Studio to do the following:

  - Make a backup copy of the database and transaction log for Compliance Accelerator or Discovery Accelerator.

  - Truncate the transaction log.

  Consult the documentation that accompanies SQL Server Management Studio for instructions on how to perform these activities.

Moving the Discovery Accelerator servers to new hardware

Only undertake the following steps after you have completed the preparatory steps described in the previous section.

To move a Discovery Accelerator server to new hardware

1   If you want to move the Discovery Accelerator customer databases and report server database as well as the configuration database and server installation, perform the following activities. If you do not want to move the customer databases and report server database, proceed to step 3.

   - Detach the configuration database, customer databases, and report server database from the current SQL Server instance.

   - Move the detached data files and log files to the new location.

   - Attach the databases to the new SQL Server instance.

   Consult the SQL Server documentation for more information on how to perform these activities. You may find the following articles on the Microsoft website useful:

   - *How to move SQL Server 2005 databases to a new location by using Detach and Attach functions* (http://support.microsoft.com/?kbid=224071)

   - *Moving a Report Server Database to Another Computer in SQL Server 2005* (http://msdn.microsoft.com/en-us/library/ms156421(v=SQL.90).aspx)

   - *How to: Move a Database Using Detach and Attach in SQL Server 2008 R2* (http://msdn.microsoft.com/en-us/library/ms187858.aspx)

   - *Moving the Report Server Databases to Another Computer in SQL Server 2008 R2* (http://msdn.microsoft.com/en-us/library/ms156421.aspx)

2   Install the following software on the new Discovery Accelerator server:

   - The prerequisite software for the Discovery Accelerator server.

   - The Discovery Accelerator server software.

See the documentation that accompanies Discovery Accelerator for guidelines.

3 Copy the following four files from the original server to the Discovery Accelerator installation folder on the new server:

- `AcceleratorManager.exe.config`

- `AcceleratorManagerConsole.exe.config`

- `AcceleratorService.exe.config`

- `ADSynchroniser.exe.config`

4 Check and modify the folder paths that are specified in all four configuration files. The files contain multiple references to the following:

- The Enterprise Vault installation folder

- The Discovery Accelerator `Reports` folder

- The Discovery Accelerator `Reports\Share` folder

For example, the files may include the following references to the Discovery Accelerator `Reports` and `Reports\Share` folders:

```
<add key="ReportSourceLocation" value="C:\Program Files\
   Enterprise Vault Business Accelerator\Reports" />
<add key="ReportShare" value="C:\Program Files\
   Enterprise Vault Business Accelerator\Report\Share" />
```

The default installation folder for Discovery Accelerator on 64-bit computers is under the `C:\Program Files (x86)` folder, so you must amend the folder paths in the configuration files accordingly.

```
<add key="ReportSourceLocation" value="C:\Program Files (x86)\
   Enterprise Vault Business Accelerator\Reports" />
<add key="ReportShare" value="C:\Program Files (X86)\
   Enterprise Vault Business Accelerator\Report\Share" />
```

There are other lines within the configuration files that you must update to specify the new installation path for Enterprise Vault.

For more information on editing the configuration files, including additional steps that you need to take when the name of the new Discovery Accelerator server differs from that of the original server, see the following article on the Symantec website:

http://www.symantec.com/docs/TECH55065

5 Save and close the configuration files.

6 Open the Accelerator Manager website.

7   In the **Configuration Database Details** page, specify the details of your SQL
    Server and configuration database, and then click **OK**.

    Unless the name of your SQL Server has changed, you must specify exactly
    the same details as you supplied when setting up the configuration database.
    In particular, check **Use Existing Database** to instruct the Accelerator Manager
    website to use the specified existing database instead of creating a new one.

8   When the Accelerator Manager website prompts you to do so, restart the
    Enterprise Vault Accelerator Manager service. You can use the Services
    snap-in to Microsoft Management Console to restart the service.

9   In the Accelerator Manager website, check and amend the properties of each
    customer database for which you have moved the existing Discovery
    Accelerator server to a new server. To amend the properties of a customer
    database, right-click its name in the left pane of the Accelerator Manager
    website and click **Properties**.

    Note the following:

    ■   You must ensure that the names of the customer's task server and IIS
        Server are correct.
        You cannot upgrade a customer database until you have set its **Customer's
        tasks server** field to a new, running Discovery Accelerator server. In
        addition, until you have set the **Customer's tasks server** field to the new
        server, the Accelerator Manager website shows the wrong status for the
        customer database (Installed rather than Upgrade).
        If you are upgrading to a later version of Discovery Accelerator then, after
        you have selected the appropriate customer's task server, you can click
        Upgrade to update the customer database and migrate it to the new server.
        Clicking **OK** migrates the database without upgrading it.

    ■   If you have moved the customer databases to a different SQL Server, you
        must check that the specified SQL Server and database names are correct.

    ■   You must check the specified database locations for analytics, and change
        them if you have also changed the SQL Server.

10 If you have moved the report server database to a different SQL Server, check
    and amend the details in the **Reporting Server** page of the Accelerator
    Manager website.