Veritas Enterprise Vault™ Upgrading from Backup Exec Archiving Option 2010 to Enterprise Vault



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Chapter

Introduction

This chapter includes the following topics:

- About this technical note
- Compatibility between Backup Exec Archiving Option and Enterprise Vault versions
- Notes and recommendations
- Where to get more information about Enterprise Vault

About this technical note

When you install Backup Exec Archiving Option, Backup Exec installs Enterprise Vault with limited features for archiving data. To use all the archiving features of Enterprise Vault, you must upgrade to the full version of Enterprise Vault.

This technical note provides instructions on how to upgrade to Enterprise Vault from Backup Exec Archiving Option.

You can upgrade to Enterprise Vault on the same computer as the media server or on a separate server. Refer to the instructions that are appropriate for your upgrade:

- See "About upgrading to Enterprise Vault on the media server" on page 10.
- See "About upgrading to Enterprise Vault on a separate server" on page 22.

Compatibility between Backup Exec Archiving Option and Enterprise Vault versions

The following table shows the supported combinations of Backup Exec Archiving Option and the Enterprise Vault versions.

Backup Exec Archiving Option versions	Embedded version of Enterprise Vault	Supported full versions of Enterprise Vault	Notes
2010	8.0 SP2	8.0 SP3 or later 9.0 or later 10.0 or later. Direct upgrades are not supported.	To upgrade to Enterprise Vault 10.0, first upgrade to Backup Exec Archiving Option 2010 R3 or to Enterprise Vault 9.0 (or any 9.0 service pack), then upgrade to Enterprise Vault 10.0 (or any 10.0 service pack).
2010 R2	8.0 SP2	8.0 SP3 or later 9.0 or later 10.0 or later. Direct upgrades are not supported.	To upgrade to Enterprise Vault 10.0, first upgrade to Backup Exec Archiving Option 2010 R3 or to Enterprise Vault 9.0 (or any 9.0 service pack), then upgrade to Enterprise Vault 10.0 (or any 10.0 service pack).
2010 R3	9.0.1	9.0.2 or later 10.0 or later 11.0. Direct upgrades are not supported.	To upgrade to Enterprise Vault 11.0, first upgrade to Enterprise Vault 10.0 (or any 10.0 service pack), then upgrade to Enterprise Vault 11.0.

Table 1-1 Backup Exec Archiving Option and Enterprise Vault versions

Notes and recommendations

Note the following:

- Check that the prerequisites for Enterprise Vault are satisfied, as described in the Installing and Configuring guide. The manual is in the Documentation folder of the Enterprise Vault media.
 - Also see the Enterprise Vault Compatibility Charts at http://www.veritas.com/docs/000097605 for the latest information on supported software and storage devices.
- Backup Exec Archiving Option does not support installation on clustered servers. Consequently, each upgraded installation of Enterprise Vault has its own Directory database. For this reason:
 - You cannot convert such Enterprise Vault servers to servers with cluster support using the Convert to Cluster wizard.

- If you upgrade to Enterprise Vault from multiple Backup Exec Archiving Option deployments, you cannot add the Enterprise Vault servers within a single site.
- You cannot have a multi-site Enterprise Vault deployment after you upgrade from the Backup Exec Archiving Option. This is because during the Backup Exec Archiving Option installation, Backup Exec adds a hard-coded value for the Enterprise Vault site alias in the hosts file. You cannot create multiple Enterprise Vault site aliases of the same name in the domain controller.
- If you delete an archive job for a particular volume in Backup Exec Archiving Option then archiving is disabled for these volumes after the upgrade. You need to manually enable archiving for these volumes.
- Do not uninstall Backup Exec from media servers where you have upgraded from Backup Exec Archiving Option to Enterprise Vault. Uninstalling Backup Exec from such media servers uninstalls Enterprise Vault. Veritas is working to resolve this issue.

Where to get more information about Enterprise **Vault**

Table 1-2 lists the documentation that accompanies Enterprise Vault.

Table 1-2 Enterprise Vault documentation set

Document	Comments
Veritas Enterprise Vault Help	Includes all the following documentation so that you can search across all files. You can access this file by doing either of the following:
	 On the Windows Start menu, click Start > Programs > Enterprise Vault > Documentation. In the Administration Console, click Help > Help on Enterprise Vault.
Introduction and Planning	Provides an overview of Enterprise Vault functionality.
Deployment Scanner	Describes how to check the required software and settings before you install Enterprise Vault.
Installing and Configuring	Provides detailed information on setting up Enterprise Vault.

Enterprise Vault documentation set (continued) Table 1-2

Document	Comments
Upgrade Instructions	Describes how to upgrade an existing Enterprise Vault installation to the latest version.
Setting up Exchange Server Archiving	Describes how to archive items from Microsoft Exchange user mailboxes, journal mailboxes, and public folders.
Setting up Domino Server Archiving	Describes how to archive items from Domino mail files and journal databases.
Setting up File System Archiving	Describes how to archive the files that are held on network file servers.
Setting up SharePoint Server Archiving	Describes how to archive the documents that are held on Microsoft SharePoint servers.
Setting up SMTP Archiving	Describes how to archive SMTP messages from other messaging servers.
Administrator's Guide	Describes how to perform day-to-day administration, backup, and recovery procedures.
Reporting	Describes how to implement Enterprise Vault Reporting and FSA Reporting. Enterprise Vault Reporting provides reports on the status of Enterprise Vault servers, archives, and archived items. FSA Reporting provides additional reports for file servers and their volumes.
Utilities	Describes the Enterprise Vault tools and utilities.
Registry Values	A reference document that lists the registry values with which you can modify many aspects of Enterprise Vault behavior.
Help for Administration Console	The online Help for the Enterprise Vault Administration Console.
Help for Enterprise Vault Operations Manager	The online Help for Enterprise Vault Operations Manager.

The release notes provide information about new features, fixes, and known issues in the release.

For the latest information on supported software and storage devices, see the Enterprise Vault Compatibility Charts at

Where to get more information about Enterprise Vault

http://www.veritas.com/docs/000097605.

For the latest information on Enterprise Vault sizing and performance, see the Enterprise Vault Performance Guide at

http://www.veritas.com/docs/000005725.

Chapter 2

Upgrading to Enterprise Vault on the media server

This chapter includes the following topics:

- About upgrading to Enterprise Vault on the media server
- Upgrading to Enterprise Vault on the media server
- Manually configuring Enterprise Vault after the upgrade

About upgrading to Enterprise Vault on the media server

When you install the Backup Exec Archiving Option component, Backup Exec creates a Directory database for Enterprise Vault. During the upgrade you cannot choose an existing Directory database of another Enterprise Vault server.

After you upgrade to the full version of Enterprise Vault, all archiving options disappear from the Backup Exec Administration Console.

Upgrading to Enterprise Vault on the media server

The upgrade from Backup Exec Archiving Option to the full version of Enterprise Vault disables the archiving option in Backup Exec. After the upgrade you must use Enterprise Vault for archiving data.

To upgrade to Enterprise Vault on the media server

- 1 Log on to the Vault Service account on the computer where the media server is installed.
- 2 Load the Enterprise Vault media.

- 3 Open the Veritas Enterprise Vault version folder.
- 4 Open the Server folder.
- Double-click SETUP. EXE to start the upgrade.
- 6 In Welcome to Enterprise Vault, click Next.
- In Software License Agreement, click Yes.

In Select Features to Install, the Enterprise Vault services and Administration Console options are selected by default.

Note: The default install path is \Program Files\Veritas\Backup Exec\Enterprise Vault. You cannot change the installation path.

- 8 In Select Software License Files, browse to select the new Enterprise Vault license file you want to use. Confirm that the full path and file name of the license file is displayed correctly and click Next.
- 9 In **Installation Summary**, click **Next**. The installation may take a few minutes. You may be prompted to restart your computer. The installation continues after you have restarted the computer. A confirmation message informs you that the installation is complete.

Manually configuring Enterprise Vault after the upgrade

You need to manually configure the following settings to use Enterprise Vault after the upgrade:

- Create the Enterprise Vault server and Site DNS aliases. See "Creating Enterprise Vault DNS Aliases" on page 12.
- Add the Shopping service. See "Adding the Shopping service" on page 13.
- Start all the Enterprise Vault services. See "Starting the Enterprise Vault services" on page 13.
- Start all the tasks. See "Starting the Enterprise Vault tasks" on page 14.
- Update Vault Store properties. See "Configuring Vault Store properties for removal of safety copies" on page 14.
- Set up Exchange server archiving.

See "Setting up Exchange Server archiving" on page 15.

- Set up File System Archiving. See "Setting up File System Archiving" on page 16.
- Configure Enterprise Vault Reporting. See "Configuring Enterprise Vault Reporting" on page 18.

Creating Enterprise Vault DNS Aliases

During the Backup Exec Archiving Option installation, Backup Exec updates the hosts file on the media server with the DNS aliases required to connect to the Enterprise Vault server. The associated IP address is the loopback address 127.0.0.1.

For example.

```
# Created by Backup Exec Archiving Option
127.0.0.1
               EnterpriseVaultSite
# Created by Backup Exec Archiving Option
127.0.0.1
               EV-BE-2a3a1b4f.greenwood.com
```

Use these entries to manually create the Enterprise Vault DNS aliases in the domain controller. You need to do this before you use an EMC Celerra device as a target for file server archiving, or before you use the Enterprise Vault Move Archive feature.

Note: If you are upgrading from Backup Exec Archiving Option 2010 R3 to Enterprise Vault 9.0.2 or later, and if you have installed the Backup Exec Exchange Mailbox Archiving Option, you need to create only the site alias. The Backup Exec installer creates the Enterprise Vault server alias in the domain controller during the upgrade.

To create Enterprise Vault DNS aliases

On the media server, open the hosts file. The hosts file contains the following entries:

```
# Created by Backup Exec Archiving Option
127.0.0.1
               EnterpriseVaultSite
# Created by Backup Exec Archiving Option
               EnterpriseVaultServerAlias
```

Make a note of the entries for the Enterprise Vault server and Enterprise Vault site aliases.

- **2** On the computer that is a domain controller, create the following aliases:
 - Use Enterprise Vault Server Alias to create the Enterprise Vault server alias.

Note: When you start the Enterprise Vault Administration Console for the first time after the upgrade, you need to enter this value in the **Directory Service Computer** box to connect to the correct server.

- Use EnterpriseVaultSite to create the Enterprise Vault site alias.
- In the hosts file, comment out the entries for the Enterprise Vault server and Enterprise Vault site aliases.
- Run ping from a command prompt window to verify that both the aliases resolve to the correct computer.
- Remove the entries from the hosts file.

Adding the Shopping service

Backup Exec does not install the Shopping service during the Archiving Option installation. You need to add this service manually.

The Shopping service is a Windows service that lets you select items from various archives for restore when you use the Browser Search or Archive Explorer.

To add the Shopping service

- 1 Start the Enterprise Vault Administration Console.
- In the left pane, expand the Enterprise Vault site hierarchy until the **Enterprise** Vault Servers container is visible.
- 3 Expand the **Enterprise Vault Servers** container.
- Expand the computer to which you want to add a service.
- Right-click Services and, on the shortcut menu, click New and then Service. The **Add Service** dialog box appears listing only the Shopping service.
- Select Shopping Service and click Add.

Starting the Enterprise Vault services

After the upgrade, all the Enterprise Vault services are in a **Stopped** state. You need to manually start all the services from the Windows Service Control Manager.

To start the Enterprise Vault services

- In the Windows Control Panel, double-click Services.
- 2 In the list of services, right-click each service and click Start.

Starting the Enterprise Vault tasks

Only the following two tasks are created by Backup Exec Archiving Option:

- Exchange Mailbox Archiving Task
- File System Archiving Task

These tasks do not start automatically. You need to start them manually. You can edit each task's properties to set its Startup type to **Automatic**, so that the tasks start automatically when you restart the Task Controller Service.

To start Enterprise Vault tasks

- In the Administration Console, expand Enterprise Vault Servers, and then your Enterprise Vault server.
- 2 Click Tasks.
- In the right-hand pane, right-click Exchange Mailbox Archiving Task and select Properties.
- On the General tab, change the Startup Type to Automatic.
- Click OK.
- Right-click the task again and select Start.
- Similarly, edit the properties of File System Archiving Task and start it.

Configuring Vault Store properties for removal of safety copies

When Enterprise Vault archives an item, it makes a safety copy as part of the archiving process. Backup Exec Archiving Option provides the following two options for deleting safety copies:

- Immediately after archive
- Delete archived item after vault store backup

If you chose Delete archived item after vault store backup in Backup Exec Archiving Option then, in Enterprise Vault, the vault store setting to remove safety copies is configured to After backup. You may want to change the way Enterprise Vault manages safety copies.

To configure settings for removing safety copies

- In the Administration Console, expand the Vault Store Groups container and find the vault store.
- 2 Right-click the vault store and click **Properties**.

- 3 On the **General** tab of the **Vault Store Properties** page, choose an option from the Remove safety copies list.
- Click OK

Setting up Exchange Server archiving

If you have installed the Backup Exec Exchange Mailbox Archiving Option, Enterprise Vault Exchange Server archiving is set up as follows:

- The Exchange Server sources are added as targets under Targets > Exchange > DomainName.
- The Exchange mailbox groups appear as provisioning groups under Targets > Exchange > DomainName > Provisioning Group.
- Each provisioning group has an associated mailbox policy with the same name as the provisioning group under **Policies** > **Exchange** > **Mailbox**.
- Each provisioning group's properties are configured as follows:
 - **General** tab: Displays the name of the group and the associated mailbox policy.
 - Archiving Defaults tab: Displays the retention category associated with the
- All the retention categories you create in Backup Exec Exchange Mailbox Archiving Option appear under **Policies** > **Retention Categories**.
- Each mailbox policy's properties are populated as follows:
 - General tab: Displays the name of the policy.
 - Archiving Rules tab: Displays the settings you configured in Backup Exec Archiving Option.
 - Archiving Actions tab: Create shortcut to archived item after archiving is not selected by default. Select this option to create shortcuts.
 - Shortcut Content tab: Content of shortcut body is set to None by default. Edit this option as required.

If required you can configure Enterprise Vault Reporting, which provides operation reports on Enterprise Vault and Exchange Server archiving.

See "Configuring Enterprise Vault Reporting" on page 18.

Setting up File System Archiving

If you have installed the Backup Exec File System Archiving Option, you need to configure File System Archiving in Enterprise Vault to work with the Backup Exec File System Archiving Option file server sources.

To set up File System Archiving in Enterprise Vault for existing Backup Exec File System Archiving Option targets you need to do the following:

- Install the FSA Agent. See "Installing the FSA Agent on a Windows file server" in the Setting up File System Archiving guide.
- Update Volume and Folder policies. See "Updating volume and folder policies" on page 16.
- If required you can configure Enterprise Vault Reporting, which provides operation reports on Enterprise Vault. If you also configure FSA Reporting you can obtain additional data analysis reports for your file server targets. See "Configuring Enterprise Vault Reporting" on page 18.

This section describes the settings you need to configure to use Enterprise Vault with existing Backup Exec File System Archiving Option file server sources. For more information about how to add and work with additional file servers, see the Setting up File System Archiving guide.

Updating volume and folder policies

Enterprise Vault creates the following policies by default:

- Under Policies > File > Volume Default Share Archive Settings
- Under Policies > File > Folder Default Folder Archive Settings

Backup Exec File System Archiving Option creates the following policies by default:

- Under Policies > File > Volume BEAO FSA Volume Policy with zero rules
- Under Policies > File > Folder BEAO FSA Folder Policy with zero rules

Additionally, the rules you create for archiving jobs in Backup Exec File System Archiving Option are populated as policies in Enterprise Vault. These folder policies are named after the archiving jobs that they were associated with. For example, Archive 00001.

You can change the policy settings by updating the properties of the volume and folder policies.

To update volume policies

- In the Administration Console, expand the Enterprise Vault site until the Policies container is visible.
- 2 Expand the **Policies** container.
- 3 Expand the **File** container.
- 4 Click the **Volume** container.
- In the list of policies, right-click the policy you want to modify and, on the shortcut menu, click Properties.
- 6 Click the Shortcuts tab.

The setting for the type of shortcut to leave to an archived file is set to **Internet** Link by default. You can edit this setting if you want Enterprise Vault to leave placeholders instead of links.

Note that if you choose to leave placeholder shortcuts, you must install the FSA Agent on any Windows file servers to which this policy is applied.

See "Installing the FSA Agent on a Windows file server" in the Setting up File System Archiving guide for instructions on how to install the FSA Agent.

7 Click the **Archiving Rules** tab.

There are no rules defined in Enterprise Vault for the volume policy. You need to define the set of rules you want Enterprise Vault to include in this policy.

- 8 Similarly, you can define any File Blocking rules in the File Blocking Rules tab.
- 9 Click the **Permissions** tab.

The setting for archiving files with explicit permission is set to **Ignore them**. You may choose to select **Archive them** to make Enterprise Vault include files with explicit permissions when archiving.

To update folder policies

- In the Administration Console, expand the Enterprise Vault site until the Policies container is visible.
- 2 Expand the **Policies** container.
- 3 Expand the **File** container.
- 4 Click the **Folder** container.
- In the list of policies, right-click the policy you want to modify and, on the shortcut menu, click Properties.
- Click the **Shortcuts** tab and do the following:

- Clear Use Volume Policy Settings if you want to define specific settings for the folder.
- Select the type of shortcuts to leave to archived files. You can choose to leave either placeholders or Internet links. Note that if you choose to leave placeholder shortcuts, you must install the FSA Agent on all the Windows file servers to which this policy is applied. See "Installing the FSA Agent on a Windows file server" in the Setting up File System Archiving guide for instructions on how to install the FSA Agent.
- 7 Click the **Rules** tab, then click **Edit** to display the **Rule** window.
- On the rule's **Shortcut Creation** tab, **None. Archive and delete file** is selected by default.
 - Select the required shortcut creation option and click **OK**.
- 9 Click the **Permissions** tab to define settings for archiving files with explicit permission. The setting for archiving files with explicit permission is set to Ignore them by default. Do the following:
 - Clear **Use Volume Policy Settings** if you want to define specific settings for the folder.
 - You may choose to select **Archive them** to make Enterprise Vault include files with explicit permissions when archiving.

Configuring Enterprise Vault Reporting

Backup Exec provides reports to help you monitor your Archiving Option environment. After the upgrade, if you want to continue to get reports on Enterprise Vault archiving you need to configure Enterprise Vault Reporting. If you use File System Archiving and you want to obtain data analysis reports for your file server targets, you also need to configure FSA Reporting.

For information on how to configure Enterprise Vault Reporting and FSA Reporting see the Enterprise Vault Reporting guide.

Note: Before you configure FSA Reporting, you must perform an additional step to manually configure the FSA Reporting web service on the Enterprise Vault server.

See "Configuring the FSA Reporting web service" on page 18.

Configuring the FSA Reporting web service

Before you configure FSA Reporting you must perform an additional procedure to manually configure the FSA Reporting web service on the 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\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\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".

Open Internet Explorer and enter the following URL to check whether you can now 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 the Local intranet zone" on page 20.

If Internet Explorer displays an error that begins as follows when you attempt to access the ReportingServer web page:

```
[PolicyException: Required permissions cannot be acquired.]
System.Security.SecurityManager.ResolvePolicy(Evidence
evidence, PermissionSet
```

```
regdPset, PermissionSet optPset, PermissionSet denyPset,
PermissionSet& denied,
Boolean checkExecutionPermission) +2737909
System.Security.SecurityManager.ResolvePolicy(Evidence
evidence, PermissionSet
regdPset, PermissionSet optPset, PermissionSet denyPset,
PermissionSet& denied,
Int32& securitySpecialFlags, Boolean checkExecutionPermission)
+57
```

Then proceed 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 and try accessing the ReportingServer web page again.

Adding the FSA Reporting web service locations to the Local intranet zone

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

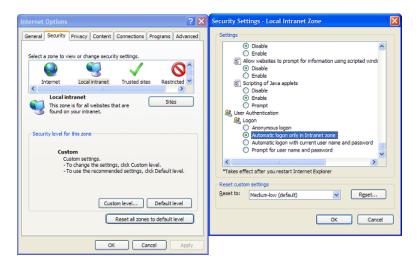
To add the FSA Reporting web service locations to the Local intranet zone

- 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 guery returns.
- On the Enterprise Vault server, start Internet Explorer and on the **Tools** menu, select Internet Options.
- 5 On the **Security** tab, click **Local intranet** and then click **Sites**.
- 6 On the **Local intranet** dialog, click **Advanced**.

- 7 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 them to the Trusted Sites zone.
- 8 Ensure that the Local intranet zone's user authentication is set to "Automatic logon only in Intranet zone".



Save the Internet Explorer settings and close Internet Explorer.

Chapter 3

Upgrading to Enterprise Vault on a separate server

This chapter includes the following topics:

- About upgrading to Enterprise Vault on a separate server
- Updating the Enterprise Vault site alias

About upgrading to Enterprise Vault on a separate server

Upgrading from Backup Exec Archiving Option to Enterprise Vault involves the following steps:

- Upgrading to Enterprise Vault on the media server.
 See "About upgrading to Enterprise Vault on the media server" on page 10.
- Moving Enterprise Vault to the new server.
 See the following technical note for detailed instructions on how to move Enterprise Vault to a new server:
 http://www.veritas.com/docs/TECH55377
- Updating the Enterprise Vault site alias in the domain controller and pointing it to the new server.
 - See "Updating the Enterprise Vault site alias" on page 22.

Updating the Enterprise Vault site alias

After you move Enterprise Vault to the new server, you need to update the site alias to point to the new server.

To update the site alias

- On the SQL Server computer, click **Start > Programs > Administrative Tools** > DNS.
- 2 Expand Forward Lookup Zones and click DomainName.
- 3 In the right-hand pane, right-click EnterpriseVaultSite and click Properties.
- In Fully qualified domain name (FQDN) for target host, browse to select the new server.
- 5 Click **OK** to save the change.
- Restart the DNS server. Right-click the server and click **All Tasks**, and then 6 Restart.